

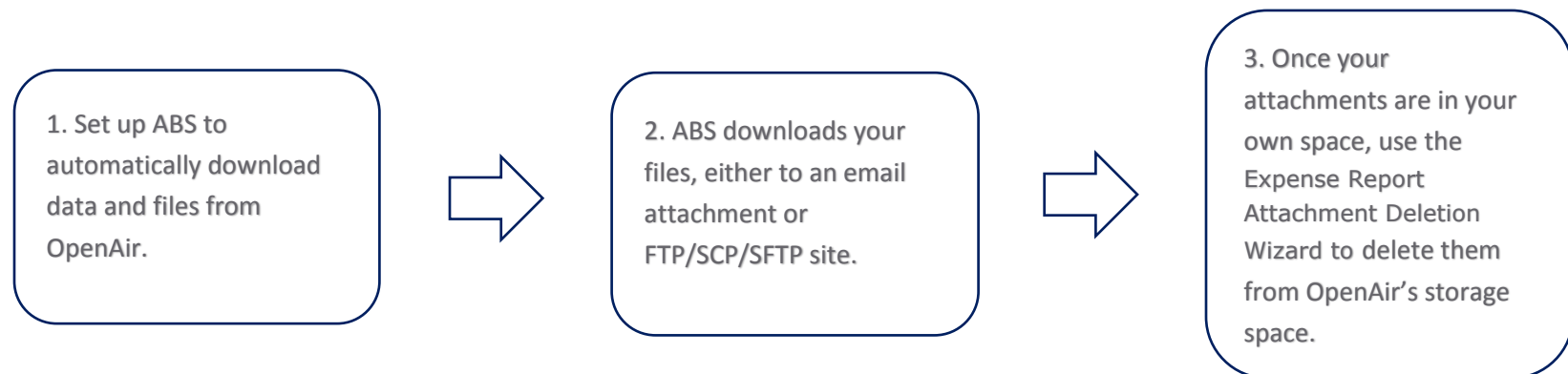
Spend less on file attachment storage space

Reliably back up your data or file attachments

Use your OpenAir data in your reporting tools

With OpenAir's Automatic Backup System (ABS) and Workspace downloads, you can extract files from your OpenAir account and store them wherever you'd like.

How does ABS work? **It's easy!**



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Using the Automatic Backup Service (ABS) to Download Attachments

The ABS allows you to setup a regular delivery of your OpenAir account data to an email address or FTPS/SCP/SFTP server. Your data is compressed as a ZIP and can be PGP encrypted for additional security. It can be used to download all of your data and attachments.

To enable the Automatic Backup Service feature, please contact your OpenAir AMO Representative.

Setting up ABS

Once enabled, navigate to Administration > Global Settings > Account > Automatic backup service and select your backup settings.

Data to include in the backup

- ☒ Data dictionary
☒ Text files ☒ Comma-delimited ☐ Tab-delimited
☐ MySQL import file ☐ UTF-8 ☐ Apply relationships

To apply table relationships, the MySQL Import file contains statements to:

- Change the storage engine to "InnoDB"
- Change foreign key columns to allow null values
- Set "0"s in foreign keys to null values

Select which data will be exported in each backup. You can include:

- The OpenAir Data Dictionary
- Text files (either Comma- or Tab-delimited) OR MySQL import files
- Documents and attachments

Here you can also choose to set the default CHARSET for MySQL import files to UTF-8 or to Apply table relationships to MySQL import files.

When do you want the backup run

Day: at Hour: Minute:

Times are in U.S. Eastern Time. We recommend running the backup at night for better performance.

Schedule when you would like the backup to run. You can run the schedule on particular days of the week or month, or every day. You can also set the time for the backup to run. We recommend running the backup in the evening for better performance.

How do you want the data sent

For large amounts of data we recommend using Implicit FTPS, Explicit FTPS, SCP, or SFTP. Email will not be sent if the file is larger than 60 MB.

Send via

- ☐ Email to:
- ☐ Implicit FTPS
☐ Explicit FTPS
☐ SCP
☐ SFTP
☐ Suspend service

Decide how you'd like the data to be sent. Email cannot be used for files larger than 60 MB.

The FTP option for receiving your ABS data has been deprecated and FTPS options with SSL-encrypted connections have been added.

- Implicit FTPS – Server is already expecting everything encrypted in SSL
- Explicit FTPS – Server is immediately switched to SSL mode

You can also choose to suspend the service from here.

Documents and attachments

- ☒ Documents and attachments
☒ Add original names and extensions to Documents and attachments

Date range filter

Date range filter will limit amount of data for backup. All documents and attachments created or updated during selected period will be backed up.

Date range filter: Start (MM/DD/YY): End (MM/DD/YY):

File size of selected documents is 5.72 Mb. Final compressed zip file will be smaller

Select whether you want to include documents and attachments in the backup. You can add original names and extensions to these downloaded files. Lastly, if the size of the backup is too large, you can limit the affected time period using the Date range filter or by selecting a date range. The file size of the selected documents before compression is indicated.

Setting up ABS, continued

Once enabled, navigate to Administration > Global Settings > Account > Automatic backup service and select your backup settings.

Type the IP address or DNS name for your FTPS, SCP, or SFTP connection.

Enter the user name used for your FTPS, SCP, or SFTP connection.

Enter the Remote Port here. If you leave this blank, the default is used. The default is 21 for Explicit FTPS, 990 for Implicit FTPS, and 22 for SCP and SFTP.

Select which events are included in status emails. You can include all events or errors only.

If you want to use PGP encryption, copy and paste the PGP key here.

Text files don't include an audit trail by default, but by selecting this checkbox, an audit trail will be included. This can make the text files difficult to parse.

MySQL import files always include an audit trail.

Some tables with typically large datasets are excluded from the export by default. Selecting this option includes all tables in text and MySQL backups, including these large tables.

Select this to include a small status file with data about the transfer.

SCP/SFTP settings

SCP/SFTP file will be given a unique name for each transfer based on the following format openair_YYYY-MM-DD.zip (e.g., openair_2006-06-28.zip)

Address

IP address or DNS name

Directory

Optional directory to put the file in

User name

Password

Remote Port

Leave blank for default.
Default for SCP and SFTP is 22.
Default for Explicit FTPS is 21.
Default for Implicit FTPS is 990.

Status email

A status email will be sent to this email address after every transfer

Status notification

All

Which events to include in status emails

Specify a directory to put the exported file in.

Enter the password for the FTPS, SCP, or SFTP service here.

Enter an email address for status emails to be sent to.

PGP Encryption

Copy and paste your PGP key into the text box if you want the data to be encrypted using PGP

You can exclude tables from a MySQL import file here. Type the table list, separated by commas, here.

Other

☐ Include the audit trail in the text backup
The audit trail can make the text files difficult to parse. The MySQL import file always has the audit trail.

☐ Include all tables in the text and MySQL backups
Certain tables that typically have large data sets are excluded by default.

☐ Include status file with backup
Send a secondary status file that will transfer after the backup file has transferred.

Tables to exclude

A comma separated list of tables to exclude from the MySQL import file

Exporting All OpenAir Attachments

When set up, each export will contain a folder within the main ZIP file containing all attachments, labelled with a numeric attachment ID.

Data to include in the backup

- ☒ Data dictionary
- ☒ Text files ☒ Comma-delimited ☐ Tab-delimited
- ☐ MySQL import file ☐ UTF-8 ☐ Apply relationships

Documents and attachments

- ☒ Documents and attachments
- ☒ Add original names and extensions to Documents and attachments

Date range filter
Date range filter will limit amount of data for backup.
All documents and attachments created or updated during selected period will be backed up.

Date range filter: Start (MM/DD/YY) End (MM/DD/YY)

File size of selected documents is 6.07 Mb. Final compressed zip file will be smaller



55-sign_in	Text Document	1 KB	No
56-Status_Meeting_Agenda_12-7-09	Microsoft Word 97 - 2003 ...	7 KB	No
57-Common_NS_Event_Errors	Text Document	1 KB	No
58-allegiance	GIF image	2 KB	No
59-todo	Text Document	1 KB	No
60-Delete_an_envelope_on_sandbox	Text Document	1 KB	No
README	Text Document	1 KB	No

Selecting the **Add original names and extensions to Documents and attachments** option adds the original attachment filenames to each attachment in addition to the numeric attachment ID.

Deleting Expense Report Attachments

Once you've setup ABS and downloaded your attachments, you can delete them from OpenAir's storage space using the Expense Report Attachment Deletion wizard on the OpenAir Home Page. This allows you to delete all of the attachments from an expense report and its receipts, freeing up the storage space which the attachments are using.

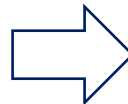
IMPORTANT: Once an attachment has been deleted from OpenAir's storage space it cannot be recovered there. We highly recommend only deleting attachments which you have downloaded using ABS, and only deleting attachments which you won't readily need to match to an expense item, for example, attachments for older expense items.

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Wizards

- Bulk employee change wizard
- Exp report attachment deletion wizard**
- Bulk task change wizard

Click here to open the Expense Report Attachment Deletion wizard.



Delete exp report attachments

The exp report date is between

Start (MM/DD/YY) End (MM/DD/YY)

Start and end dates are required

The exp report status is

☒ Reimbursed ☐ Approved

Cancel **Delete the attachments**

You can delete expense report attachments for a specific date range by setting the Start and End dates here.

You must choose to delete expense reports either with reimbursed or approved status.

Two Ways to Download Documents from Workspaces

To enable these download methods, please contact OpenAir Support and ask them to enable the following switches:

- **Enable downloading all documents in all workspaces to a single zip**
- **Enable bulk document deletion when downloading all documents**

Note: The Download Workspace Document options only download or delete documents from within Workspaces. For more comprehensive download and deletion functions, use the ABS system.

Downloading Workspace Documents from One Workspace

Easily download or delete documents in bulk from the desired Workspace.

1. Select the Workspace you would like to download and/or delete all attachments from.
2. From the Workspace Dashboard, choose **Download all documents**.
3. Select your desired options, and click **Download**.

Downloading Workspace Documents from All Workspaces

Easily download all documents in all of your Workspaces. This feature does not provide deletion functionality.

1. Navigate to Administration > Application Settings > Workspaces Settings > Download all documents.
2. Click **Download**.

Select this option to include all folders and preserve the folder or document structure.

Select this option to include document revisions in a sub-folder.

Select this option if you want to delete all documents.

Cancel Download

Download all documents

☐ Include folders
The folder/document structure will be preserved

☐ Include document revisions
Revisions for each document will be placed in a sub-folder

☐ Delete all documents
All documents will be deleted!

Cancel Download

Download all documents

Download all documents in all workspaces.

This will include all folders and all document revisions.

Cancel Download

Click here to download all documents in all workspaces.

Configuring Storage Alerts

Storage Alerts can be used to tell you when your account storage has reached a certain percentage of capacity. You can set storage alerts by navigating to Administration > Application Settings > Workspaces Settings > Alerts. From here, you can click Create to create new alerts, or edit existing ones in the list view.

Type an alert name here.

Account storage alert 80% of storage

Alert name

80% of storage

Set the date and time the alert runs.

Alert runs on

Day

Monday

at

Hour

12am

Minute

00

Times are in U.S. Eastern Time.

Set the percentage of capacity used which triggers the alert.

Rule

Send email if account storage reaches 80 % of capacity.

Type the email address which will indicate who the email is from.

Email notification

The email is from

Type the email address of the alert recipient.

The email will be sent to

Type the subject of the alert email.

Subject

Account storage limit alert

Enter any additional text to include in the email.

Additional text to include in email

This is an automatic reminder. Account storage now exceeds 80% of your contract amount.

Contact your account manager for more storage.

Other

Notes

Active alert

Select whether this is an active alert or not.