

Archive Assistant[©] v2.0.0
Expiration and Deletion Property Update Program
for use with Xerox DocuShare
from
Criteria First

<http://www.CriteriaFirst.com>

Archive Assistant[®] v2.0.0
Expiration and Deletion Date Update Program
From Criteria First

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Introduction

Archive Assistant from CriteriaFirst is an application allowing for the setting of Expiration and Deletion date properties of objects in the DocuShare Content Management System. Setting of these properties is critical in the maintenance of the data as well as for archival purposes. The Archive Assistant can be configured to perform different processing based on user expiration / deletion date needs.

Xerox' offering of an integrated DocuShare Archive Server can be a significant asset to your lifecycle management plans. By shifting the number of documents from your primary DocuShare server to an archive server you make the primary server easier to maintain and more responsive to your users. Moving your older, less frequently accessed documents to an archive server allows you to maintain most of your documents with a lesser degree of urgency for maintenance and upgrades. It may also be the only DocuShare server that ever requires a High Scalability Kit after a period of time or accumulation of documents. When it comes time to delete documents, you can delete them from the archive server without impacting the performance of your primary DocuShare server.

Requirements

For Archive Assistant to work properly, you will need to have previously installed:

- Xerox DocuShare Windows Client (found in DocuShare's Help section when viewed by browser). You may need to consult with your DocuShare system administrator to obtain the correct installation software and perform the installation procedure.
- Microsoft .NET Framework 4.0 Client. This should be installed automatically for you during installation of this program. Download and install the Microsoft .Net Framework 4.0 Client, if needed.

You will need to have a user account on the DocuShare server for adding content and a collection (web folder) into which you can upload your documents. We recommend using a pseudo-user such as Scriptbot with a strong password so that others can't use it. Your pseudo-user account should be a member of the Content Administrators group so that it has access to all content.

Installation

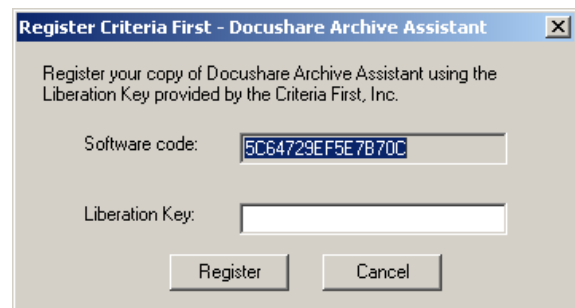
- Download the trial to a common directory to view in Windows Explorer.
- Open the compressed folder or unzip the compress file.
- Extract the files to another folder.
- Double-click on Setup.exe program file.
- Accept the default properties to install DocuShare Archive Assistant. If installing on a server or shared PC, be sure to allow Everyone on that unit to be able to run DocuShare Archive Assistant.

Use the Windows Control Panel's Add/Remove Programs to uninstall DocuShare Archive Assistant. If necessary, you can run Setup.exe again to repair DocuShare Archive Assistant.

Licensing

Archive Assistant must be registered by a user with administrator privileges before it can be used. On initial startup, if the application is not registered, the following dialog box will be displayed:

Contact Criteria First for your Liberation Key by sending your software code, as shown in the Registration Window illustration to support@criteriafirst.com noting it is for the DocuShare Archive Assistant. Once Criteria First has provided the Liberation Key, enter the key into the Liberation Key



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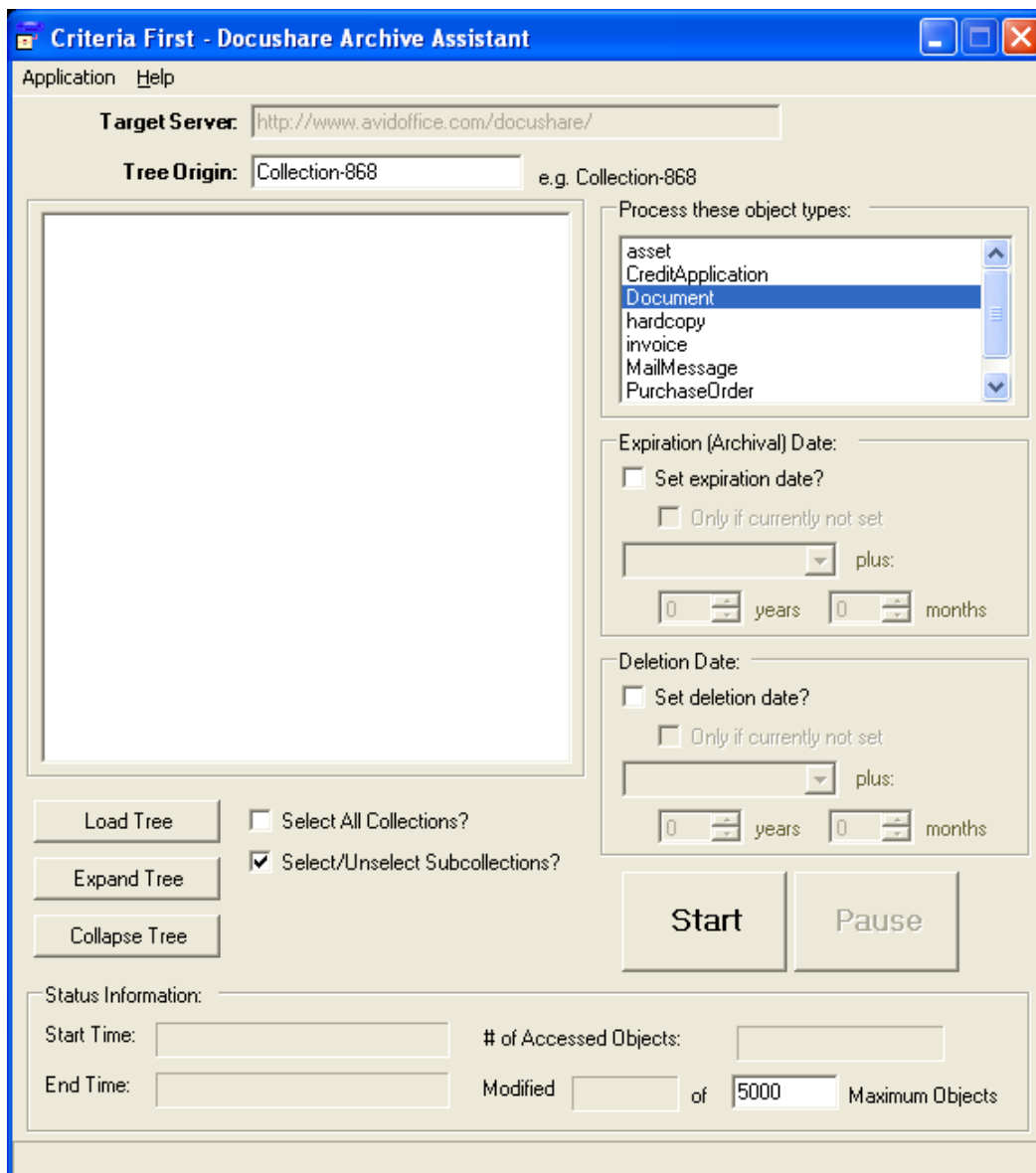
field and press the Register button. This will register Archive Assistant and enable it for use. Pressing the Cancel button will exit DocuShare Archive Assistant. This Window will only appear if DocuShare Archive Assistant has not been registered.

Starting Archive Assistant

Archive Assistant must first be configured before using it to load files to your DocuShare server. To launch Archive Assistant, from the “Start” button select:

Program Files ► CriteriaFirst ► DocuShare Archive Assistant ► DocuShare Archive Assistant

The application main window will be displayed. The main Archive Assistant window is shown in the following illustration.



Archive Assistant Main Interface

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The menu structure is as shown:

Application	
Configure...	Displays the Configuration dialog box
Exit	Exits the Archive Assistant
Help	
Topics...	Displays the help file (this file)
About...	Displays the Archive Assistant About dialog box

Configuring Archive Assistant

Archive Assistant must first be configured before it is used. It will automatically display the configuration screen the first time it is run. At any other time, you can access the configuration screen from the main interface by selecting the Application->Configure menu to display the Archive Assistant Configuration dialog box shown below.

Criteria First - DocuShare Archive Assistant Configuration

Docushare Configuration

Target Server:
http://dev.avidoffice.com/docushare/

Domain: DocuShare **User Name:** admin **Password:** xxxxxxxxxxxx **Check Login**

Deletion Date Property Name: deletion_date e.g. deletion_date

Default Collection: Collection-868 e.g. Collection-868

Login Timeout (ms): 3000

Delay (ms): 0

Save **Cancel**

Configuration Dialog Box

The red items in the configuration file are REQUIRED. These contain the key information to connect to your DocuShare server.

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Property Name	Status	Property Description
Target Server	Required	Enter the full URL to the DocuShare server
Domain	Optional	Specify the domain for the username / password combination. If no value is specified, the DocuShare default of "DocuShare" will be assumed. If your domain is different, contact your system administrator for the correct domain name.
User Name	Required	Enter the name of the DocuShare account to be used to access the data files and properties.
Password	Required	Enter the password of the username to be used to load the data files and properties.
Default Collection	Required	Enter the Default starting collection (ex: Collection-868)
Deletion Date Property Name	Optional	Enter the name of the DocuShare property identifying the deletion date. Note: This is not a standard DocuShare property. The property name must be the database field name and not the screen display name (ex: deletion_date)
Login Timeout (ms)	Required	The specified number of milliseconds before a login request times out.
Delay (ms)	Optional	The number of milliseconds to delay between processed objects. This is normally 0ms.

To configure Archive Assistant to connect to your server, perform the following steps:

1. Enter your required fields in the Configuration dialog box
2. Click the Check Login button to verify that Archive Assistant can connect to your server. If the connection was successful, Archive Assistant will inform you. If an error occurs, check the configuration settings and try again to Login.
3. Click OK when you have successfully connected to your DocuShare server.

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Using Archive Assistant

To use the DocuShare Archive Assistant, the following steps should be performed.

Run the DocuShare Archive Assistant:

Program Files ► CriteriaFirst ► DocuShare Archive Assistant ► DocuShare Archive Assistant

In the Main Interface, click the **Load Tree** button to load the DocuShare tree for the **Default Collection** from the **Target Server**. The tree will take a few seconds to load. You can easily change from the default collection to another at the top of the main page in the **Tree Origin** field. You can specify a large major collection and process it branch by branch or select smaller subcollections. Only documents which are updated count against the Maximum Objects value shown.

The screenshot shows the 'Criteria First - DocuShare Archive Assistant' window. The 'Target Server' field contains 'http://www.avidoffice.com/docushare/'. The 'Tree Origin' field contains 'Collection-868'. A tree view on the left shows a hierarchy of collections, with 'ABC Company' and 'ARGONAUTICS, INC.' expanded. The 'Process these object types' list includes 'CreditApplication', 'Document', 'hardcopy', 'invoice', 'MailMessage', 'PurchaseOrder', and 'PurchaseRequest'. The 'Expiration (Archival) Date' section has 'Set expiration date?' checked, 'Only if currently not set' checked, and 'Creation Date' selected with a plus sign, set to 2 years and 0 months. The 'Deletion Date' section has 'Set deletion date?' checked, 'Only if currently not set' checked, and 'Creation Date' selected with a plus sign, set to 17 years and 0 months. The 'Start' and 'Pause' buttons are visible. The 'Status Information' section shows 'Start Time', 'End Time', '# of Accessed Objects', and 'Modified' fields, with a 'Maximum Objects' value of 50000.

Criteria First - DocuShare Archive Assistant

Application Help

Target Server:

Tree Origin: e.g. Collection-868

Process these object types:

- CreditApplication
- Document
- hardcopy
- invoice
- MailMessage
- PurchaseOrder
- PurchaseRequest

Expiration (Archival) Date:

☒ Set expiration date?

☒ Only if currently not set

Creation Date plus: 2 years 0 months

Deletion Date:

☒ Set deletion date?

☒ Only if currently not set

Creation Date plus: 17 years 0 months

Load Tree Expand Tree Collapse Tree

Select All Collections? Select/Unselect Subcollections?

Start Pause

Status Information:

Start Time: End Time: # of Accessed Objects: Modified of 50000 Maximum Objects

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Your collection tree should appear in the tree view area just below the **Tree Origin** field. Navigate and select the specific collections to be processed. Use the **Expand Tree** button to expand the tree and the **Collapse Tree** button to collapse the tree or use the familiar + and – indicators at each node. Use the **Select All Collections** checkbox to select / unselect all of the entries in the tree view. If you want to process only a branch or two of the tree, you'll find it faster and easier to use the checkbox for **Select/Unselect Subcollections** to avoid having to click on all the subcollections for your branches.

On the right side of the interface In the **Processing these object types** group you will see a default selection of Document. You can hold down CTRL and click on additional objects you'd like to process, such as MailMessage. This list will also include custom object types cloned from the Document object, such as Invoice, PurchaseOrder, and CreditApplication. The program will detect them and list them for you. If you have different retention policies for your various object types, then process them in separate passes. For example, you may want to retain standard Document objects for five years on your main DocuShare server and delete them after seven years from your DocuShare Archive Server while you prefer to maintain your CreditApplication types of documents for one year before archiving them and delete them in five years. MailMessage and Invoice documents would be handled under other policies and retention periods.

Before continuing, it's important to note that you can set the expiration date and deletion date for your objects independently or at the same time. If you have already set your expiration date for archival and later add a deletion date property, preferably as a global property (see the DocuShare Administrators Guide for instructions), then you can sweep your collections and set only the deletion date without affecting your current expiration date properties. Updating a property takes a little bit of time and updating many properties will add to your overall processing time, so there's an option to change the setting **Only if currently not set** for greater efficiency.

In the **Expiration (Archival) Date** group, check **Set expiration date** if you wish to update this property for your objects to prepare them for archiving. The option for **Only if currently not set** appears for you. By default, the Expiration and Creation date will be set based on the objects Creation Date property. Select one of the following from the drop-down list to determine the baseline for setting the date: Creation Date, Last Modified Date, or Today. Then enter or dial in the number of years and/or months to add to the baseline for the expiration date to be set.

The **Deletion Date** group works in the same manner. Your property name must be specified in the configuration to allow the date to be applied. Property names are case sensitive.

NOTE: The Deletion Years / Months cannot be the same as the Expiration Years / Months otherwise files will be modified to be deleted on the same day they are expired. By the same token, the Deletion date cannot be less than the Expiration Date.

Click on **Start** to begin. A Confirmation of Settings page will show reiterating all your selections for your review. Click Cancel if you want to change your settings or OK to continue and begin processing your documents. While processing a collection, a small clock will appear next to the active collection which changes to a green checkmark once it's completed. This provides visual feedback and status. Should the indication be that not all collections were completely updated, you can click on Start again and it will continue from the collection where it previously quit. Be sure to review that all documents were processed before moving on to another area or processing other types of documents.

During a processing run, the following information will be displayed in the bottom portion of the Archive Assistant Window and will be updated dynamically:

Start Time Indicates the process start time

End Time Indicates the process end time

of Accessed Objects:

Modified of Maximum Objects

where

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- X is the current object being processed. Incremented for each accessed object
- Y is the total number of objects that have been modified by setting either the expiration or deletion date (or both)
- Z is the total number of maximum objects set to be processed.

The process will finish when either of the following occurs:

- Number of Modified Objects = Maximum Objects or
- All DocuShare Objects have been processed and are less than the Maximum Objects

Support

DocuShare Archive Assistant customer support is available Monday through Friday from 8:00 AM to 6:00 PM CST via email to support@criteriafirst.com or by calling 972-492-4428.