

Archive Assistant[©] v1.0

Expiration and Deletion Property Update Program
for use with Xerox DocuShare
from
Criteria First

<http://www.CriteriaFirst.com>

Archive Assistant[®] v1.0
Expiration and Deletion Date Update Program
From Criteria First

This page is intentionally left blank.

Archive Assistant[®] v1.0
Expiration and Deletion Date Update Program
From Criteria First

Table of Contents

Table of Contents	1
Introduction	2
Requirements	2
Microsoft .Net Installation.....	2
Installation	2
Licensing	3
Starting Archive Assistant	3
Configuring Archive Assistant	4
Using Archive Assistant	6
Support	7

Archive Assistant[®] v1.0

Expiration and Deletion Date Update Program From Criteria First

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.

Review the following sections for more details.

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 v1.1 Service Pack 1 (go to <http://windowsupdate.microsoft.com> if not already installed)

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.

Microsoft .Net Installation

Before Archive Assistant is installed, it is recommended that you ensure the Microsoft .Net Framework v1.1 Service Pack 1 is installed on your computer. If you do not know if it is installed, you can perform the following procedure to verify the setting:

1. Start->Run
2. Type **appwiz.cpl** and click the OK button to display the Add/Remove Applications dialog box.
3. Search for the following entry: Microsoft .Net Framework 1.1. If you do not see this installed, you can obtain the installer at <http://www.microsoft.com/downloads/details.aspx?familyid=A8F5654F-088E-40B2-BBDB-A83353618B38&displaylang=en>
4. Click the X button at the upper right button to close the Add/Remove Applications dialog box.
5. Download and install the Microsoft .Net Framework 1.1, if needed.

Installation

- CDROM setup
 - Install the CDROM in your CDROM drive.
 - In the root directory, double-click on Setup.exe.
 - Accept the default properties to install Archive Assistant.
- Downloaded file setup
 - 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 Archive Assistant.

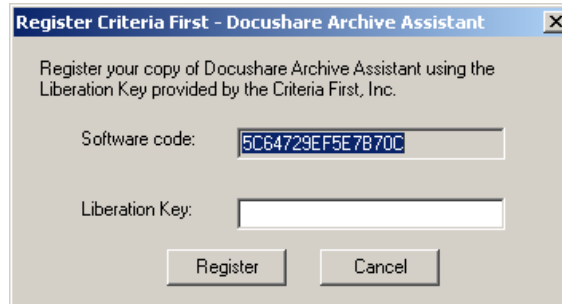
Use the Windows Control Panel's Add/Remove Programs to uninstall Archive Assistant. If necessary, you can run Setup.exe again to repair Archive Assistant.

Archive Assistant[®] v1.0

Expiration and Deletion Date Update Program From Criteria First

Licensing

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



Registration Window

Contact CriteriaFirst for the Liberation Key. You must provide the value of the Software code field to obtain the value. Once CriteriaFirst has provided the Liberation Key, enter the key into the Liberation Key field and press the Register button. This will register Archive Assistant and enable it for use.

Pressing the Cancel button will exit Archive Assistant.

This Window will only appear if 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, select Start ► Program Files ► CriteriaFirst ► Archive Assistant. The application main window will be displayed. The main Archive Assistant window is shown in the following illustration.

Archive Assistant[®] v1.0

Expiration and Deletion Date Update Program From Criteria First

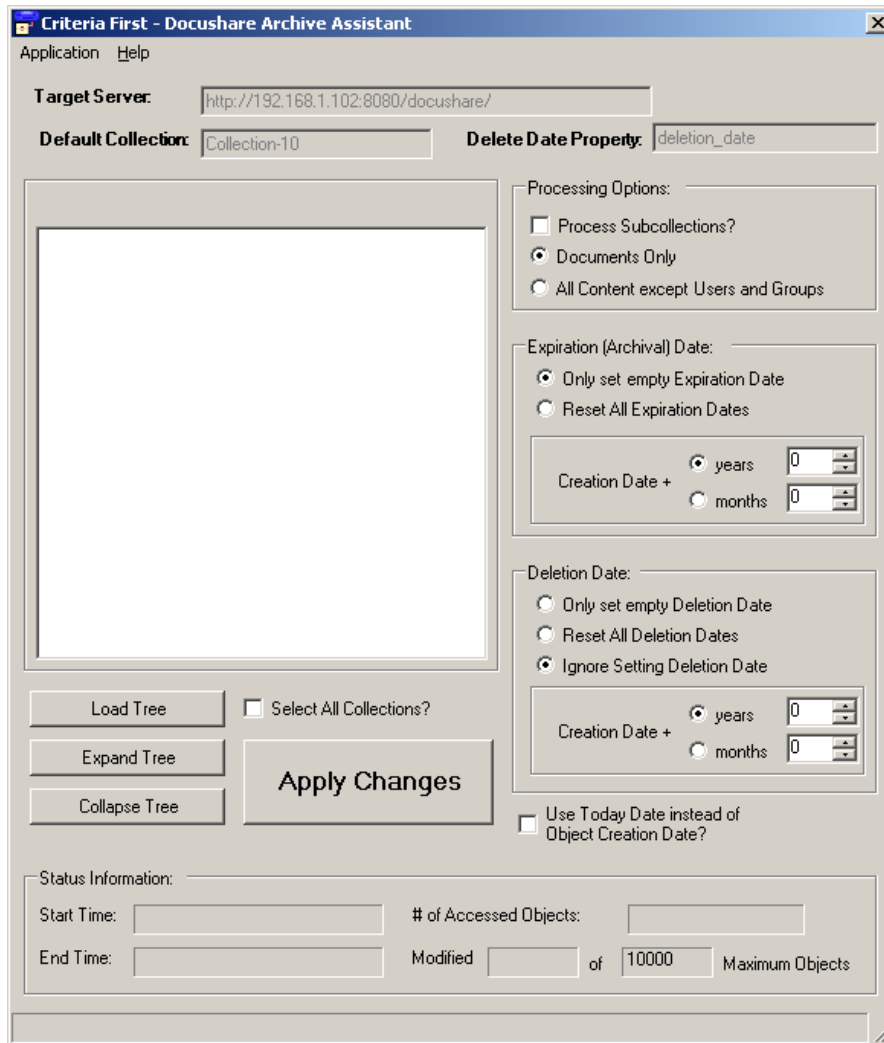


Figure 1. Archive Assistant Main Interface

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. From the main interface, select the Application->Configure menu to display the Archive Assistant Configuration dialog box shown below.

Archive Assistant[®] v1.0

Expiration and Deletion Date Update Program From Criteria First

Figure 2. Configuration Dialog Box

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

Property Name	Status	Property Description
Target Server	Required	Enter the full URL to the Docushare server
Proxy Server	Optional	Enter the full URL to the proxy 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.
DsAcess Path	Required	Select the full path to the Xerox DsAcess.exe application.
User Name	Required	Enter the name of the account to be used to load 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)
Maximum Docs to Process	Required	Select the maximum number of documents to process in a single session. This setting is to prevent too many files from being updated in a single session.

Archive Assistant[®] v1.0

Expiration and Deletion Date Update Program From Criteria First

Property Name	Status	Property Description
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.

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 Logon.
3. Click OK when you have successfully connected to your Docushare server.

Using Archive Assistant

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

Run the CriteriaFirst Archive Assistant (Start->Program Files->CriteriaFirst->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 may take a few seconds to load.

In the tree view, 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. Use the Select All Collections checkbox to select / unselect all of the entries in the tree view.

In the **Processing Options** group, check either to process **Documents Only** or **All Content except Users and Groups**.

If the **Process SubCollections** is checked, everytime a node is checked or unchecked in the Tree, all of the nodes children will be unchecked or checked accordingly.

In the Expiration (Archival) Date group, check either to **Only set empty Expiration Date** or **Reset All Expiration Dates**

Select the Expiration Date to be based on Creation Date + Years or Months. Specify a non-0 value to be used.

The default setting for Deletion Date processing is to be ignored. To use the Deletion Date, check either to **Only set empty Deletion Date** or **Reset All Deletion Dates**. Select the Deletion Date to be based on Creation Date + Years or Months. Specify a non-0 value to be used.

By default, the Expiration and Creation date will be set based on the objects Creation Date property. To override this and use the current date to set expiration / deletion dates, check the **Use Today Date instead of Object Creation Date** checkbox.

Click the **Apply Changes** button. A configuration settings dialog box will be displayed listing the changes to be applied during this process run. Read the notes very carefully. Click **OK** to confirm or **Cancel** to cancel the process.

NOTE: Only checked nodes in the Tree will be processed to apply the settings.

Archive Assistant[®] v1.0

Expiration and Deletion Date Update Program From Criteria First

NOTE: If **Use Today Date instead of Object Creation Date** is selected, the Deletion Months / Years cannot be the same as the Expiration Months / Years 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.

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: ___X___	
Modified ___Y___ of ___Z___ Maximum Objects	

Where

- 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 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

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.