

# contentACCESS Remote File archiving Manual - version 3.5



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## Table of Contents

Introduction to Remote File archiving.....	3
Installation.....	3
How to use the Remote File Archiver .....	6
Connection tab.....	7
Archive tab.....	11
Recovery tab.....	19
Active Directory tab.....	24

## Introduction to Remote File archiving

The Remote File archiving feature is used to archive files located on network shares, even if these shares are not accessible to contentACCESS (when installed in cloud).

**Note:** To use Remote File archiving, contentACCESS must be installed first.

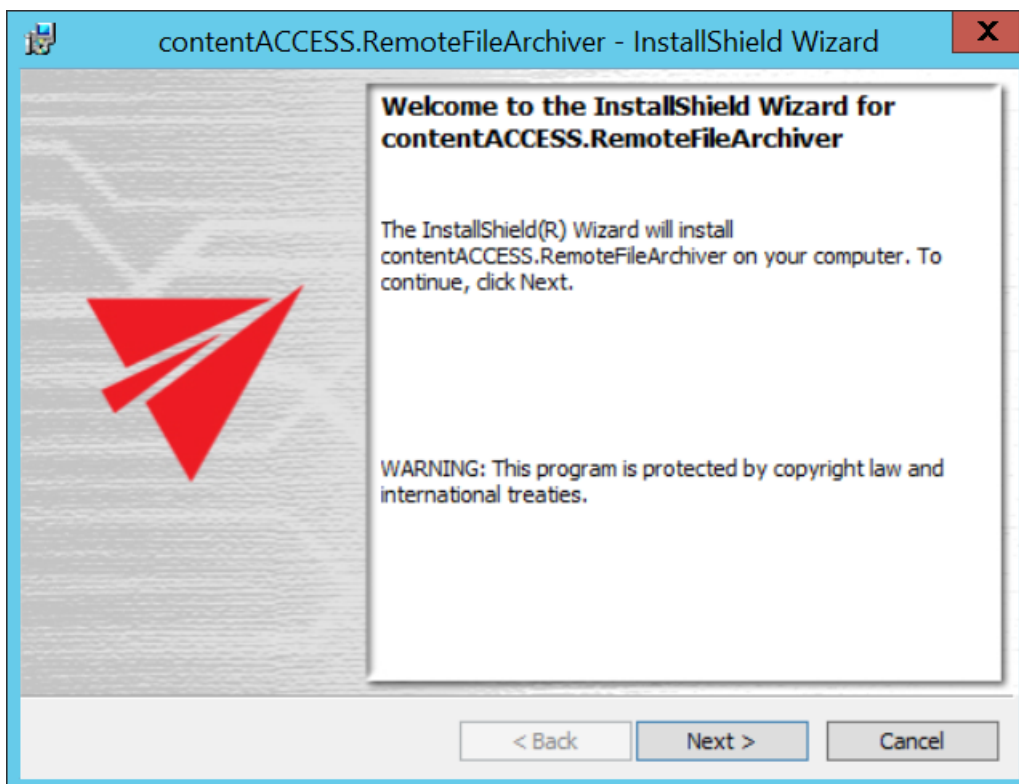
## Installation

There are two ways to reach the setup:

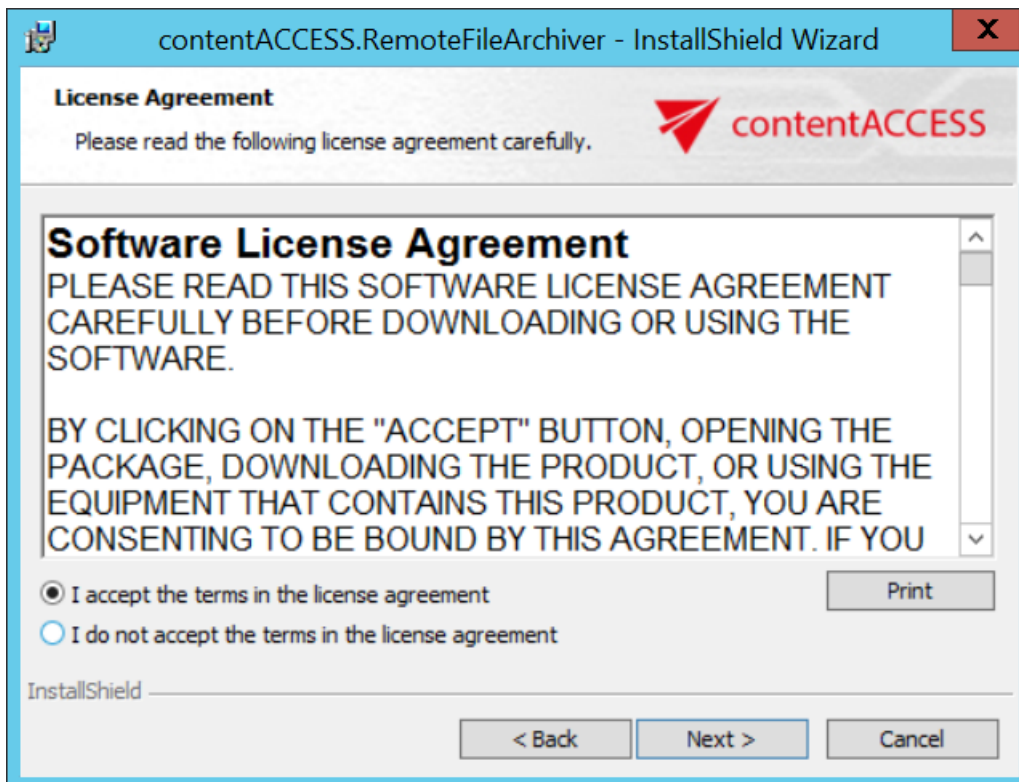
- download it from the [Remote agents](#) tab in Central administration (File archive => Archive => Remote agents)
- go to **C:\TECH-ARROW\contentACCESS\_Package\Setups** or locate the folder to which you unzipped **contentACCESS\_Package** when installing contentACCESS. Find the file with name **contentACCESS.RemoteFileArchiver\_x64.exe**.

Run the setup. The installation process goes as follows:

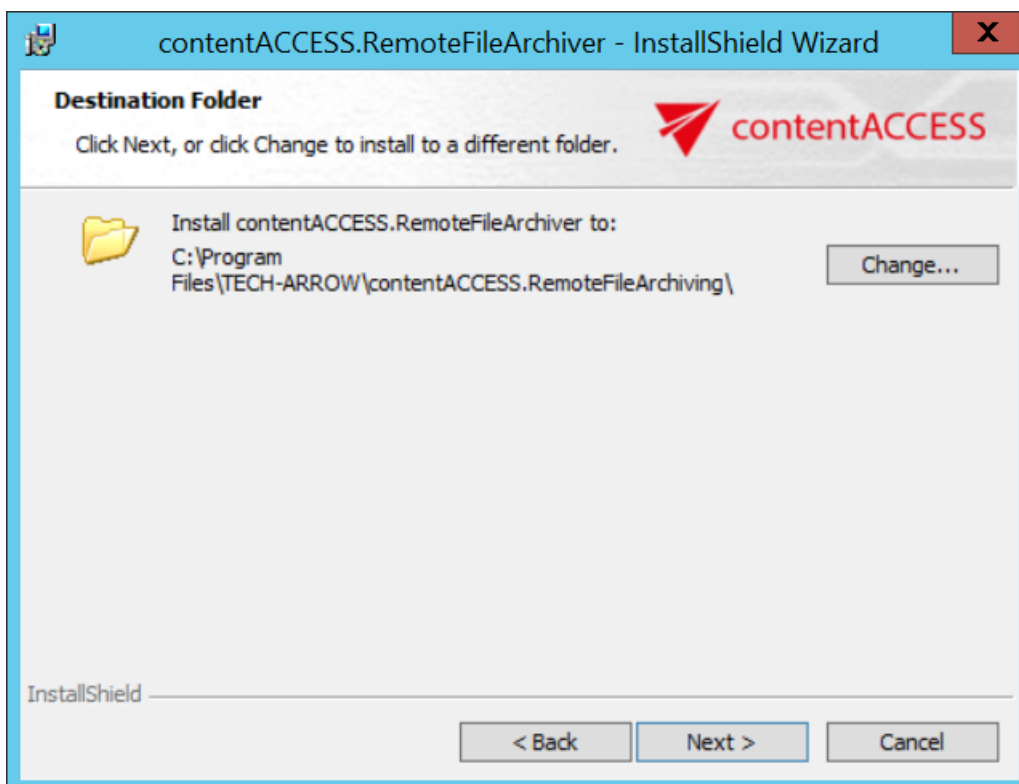
1. Click **Next**.



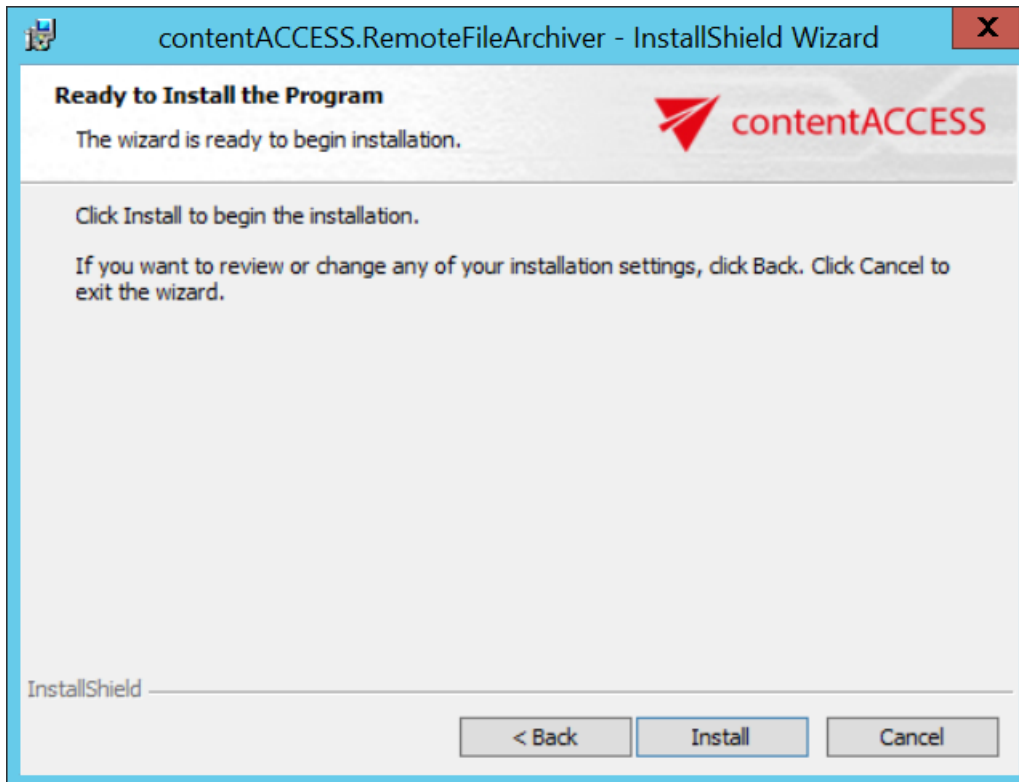
2. Choose **I accept the terms in the license agreement** and click **Next**.



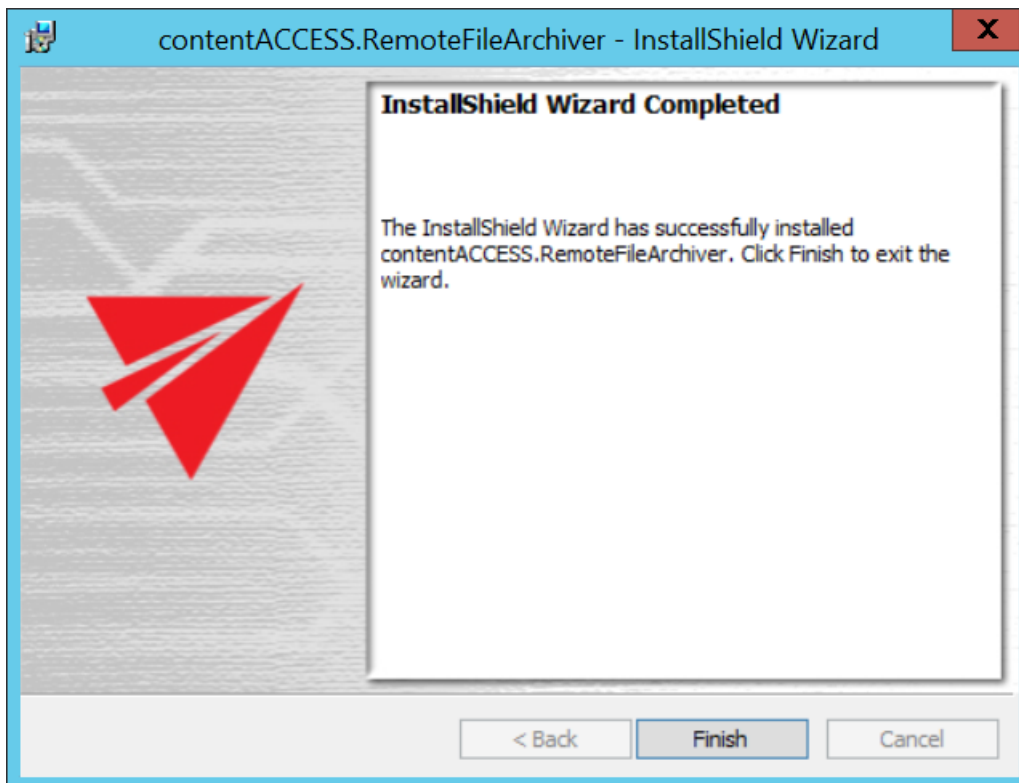
- Here you can choose the folder, to which Remote File Archiver (Remote FA further in text) will be installed. We recommend to leave it like this. Click **Next**.



- Click on **Install**.



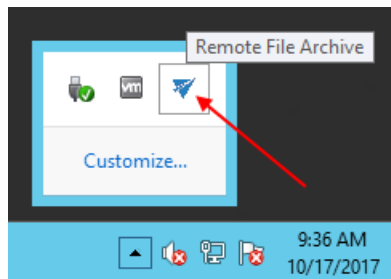
5. Click on **Finish** to complete the installation process.



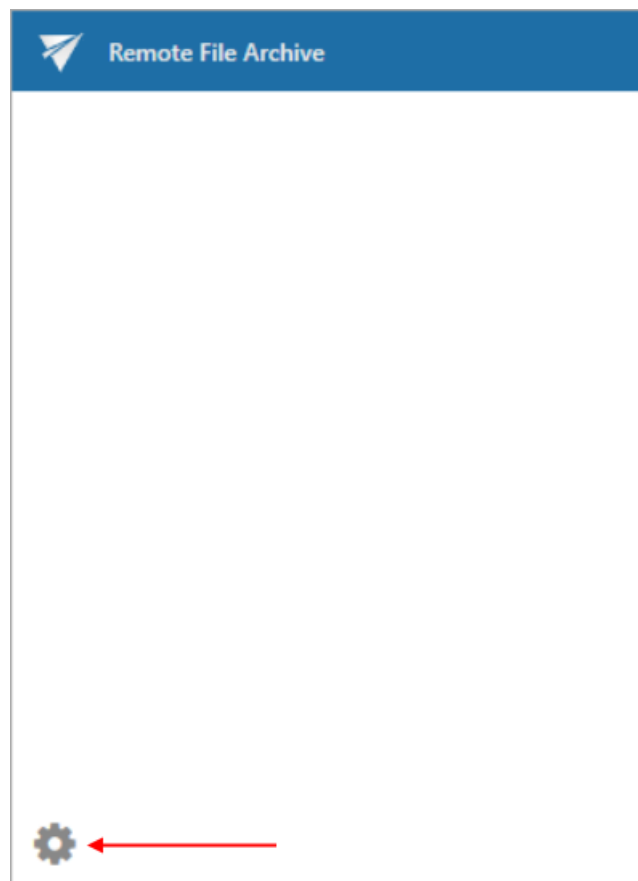


## How to use the Remote File Archiver

In the lower right corner on the taskbar (sometimes it's needed to click on **Show hidden icons**), a blue arrow will appear – this is the icon of Remote FA. Click on it.

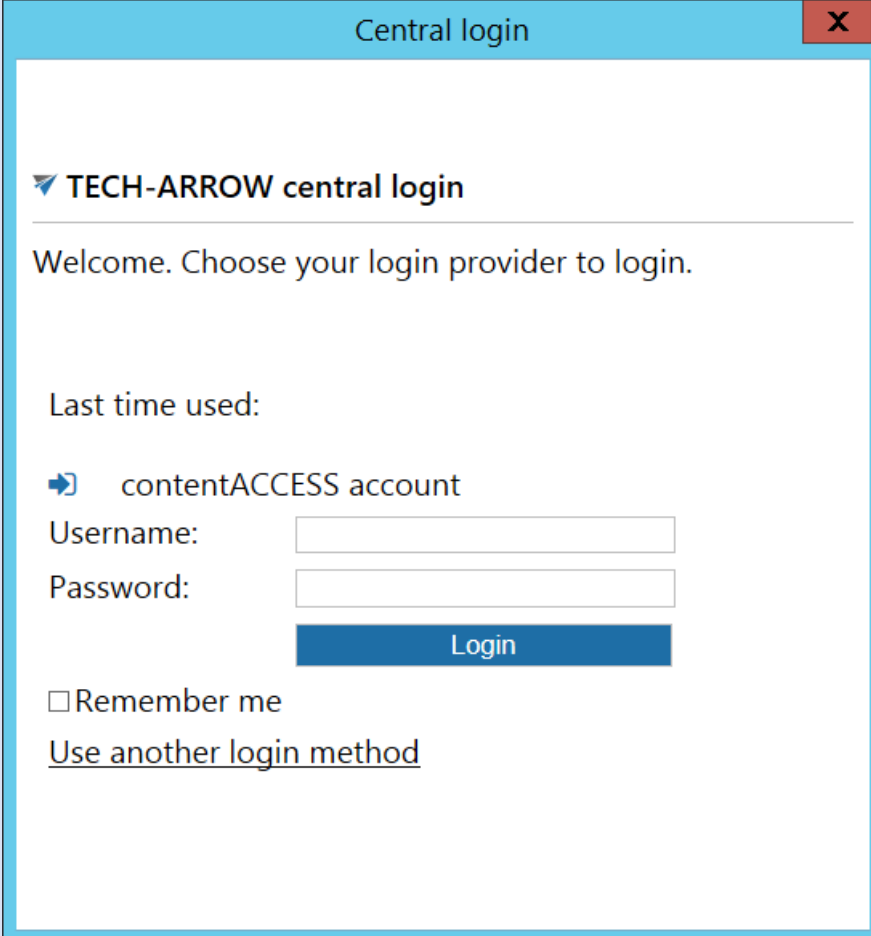


A pop-up window will open. Here it's possible to see the list of items archived by Remote FA (since we haven't archived any files yet, it is empty in our case). Click on the settings button to open the Remote FA settings. It is also possible to open the settings window by right-clicking on the icon and selecting **Settings...** in the context menu.



**Note:** If you were previously logged in, but you logged out of the app, the login pop-up window will appear after this step. You can log in now or you can close the window. If you close it, you will be

able to log in the way as if you were using Remote FA for the first time (read more about logging in in the section [Connection tab](#)). The app will open after this.



Central login

TECH-ARROW central login

Welcome. Choose your login provider to login.

Last time used:

contentACCESS account

Username:

Password:

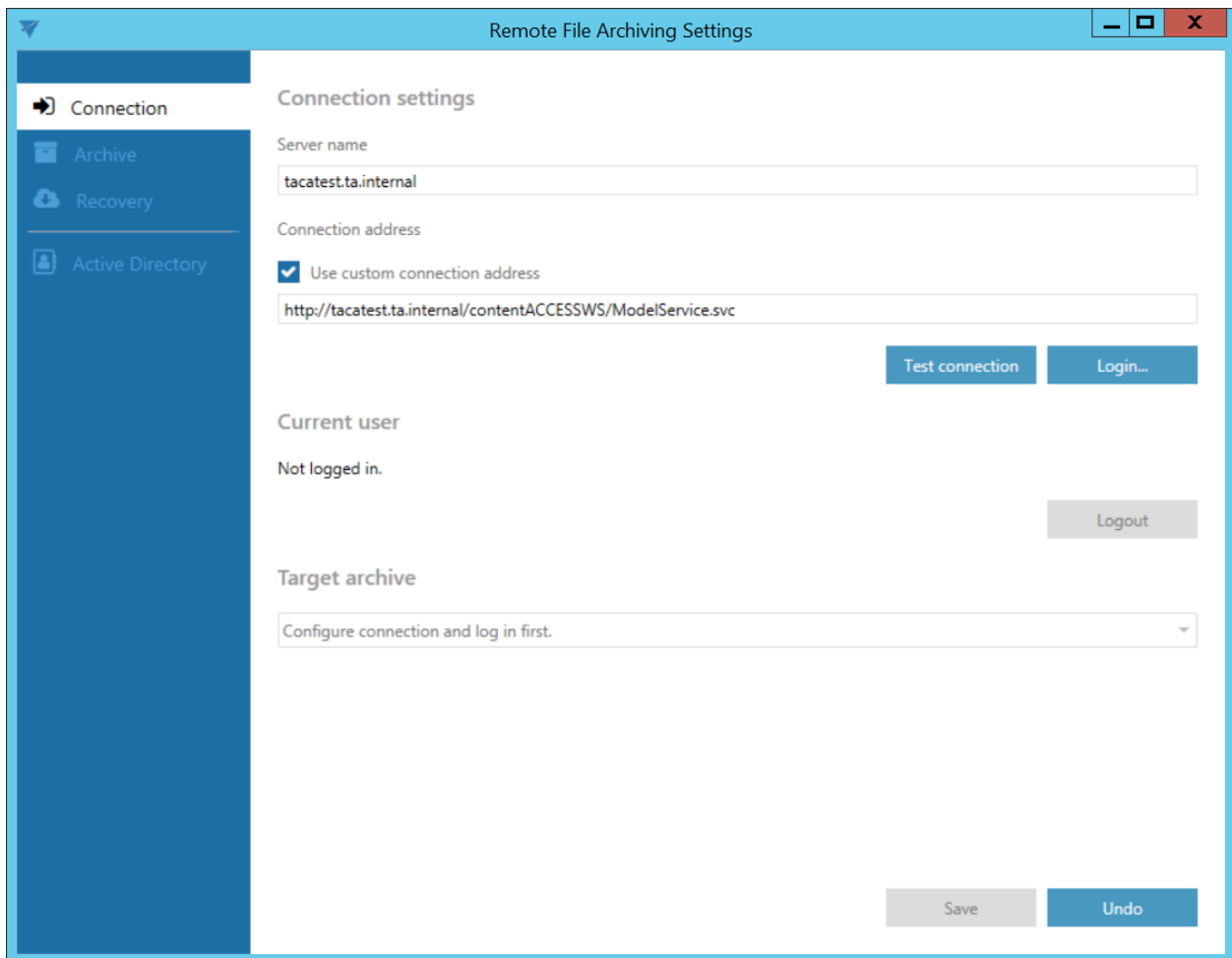
Login

Remember me

[Use another login method](#)

### Connection tab

On the connection tab, the server, where contentACCESS is installed, must be specified.



If you use proxy (contentACCESSWS) with secure (HTTPS) connection to connect to contentACCESS, configure the connection as follows:

- Leave the **Use custom connection address** checkbox unchecked
- Enter the contentACCESS server name into the **Server name** field - with this action the connection URL will be generated automatically

If you use proxy (contentACCESSWS) with unsecure (HTTP) connection to connect to contentACCESS (i.e. you use proxy but do not have a valid certificate), configure the connection as follows:

- Enter the contentACCESS server name into the **Server name** field
- Check the **Use custom connection address** checkbox
- Enter the HTTP connection URL with the correct server name into the **Custom connection address** field: [http://\[ServerName\]/contentACCESSWS/ModelService.svc](http://[ServerName]/contentACCESSWS/ModelService.svc) (or just delete the “s” from https)

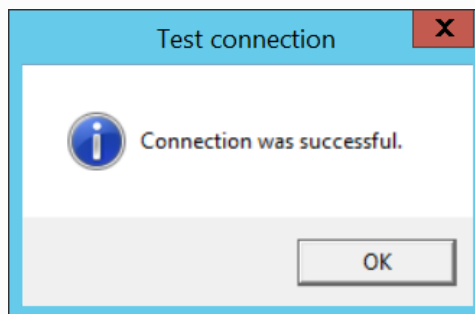




If you use direct connection to connect to contentACCESS (no proxy is installed), configure the connection as follows:

- Enter the contentACCESS server name into the **Server name** field
- Check the **Use custom connection address** checkbox
- Enter the HTTP/HTTPS (appropriate to your configuration) connection URL with the correct server name into the **Custom connection address** field: [http://\[ServerName\]:8736/contentACCESSWS/ModelService.svc](http://[ServerName]:8736/contentACCESSWS/ModelService.svc) (delete the "s" from https and add 8736 port) or [https://\[ServerName\]:8736/contentACCESSWS/ModelService.svc](https://[ServerName]:8736/contentACCESSWS/ModelService.svc) (add the 8736 port)

After setting the connection, click on the **Test connection** button under the custom connection address textbox. If everything was set correctly, this message will appear:



Click on the **Login...** button next to the **Test connection** button. Log in using the Forms method, or choose another login provider previously configured in contentACCESS by clicking on **Use another login method**.



Central login

**TECH-ARROW central login**

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Welcome. Choose your login provider to login.

Last time used:

➔ contentACCESS account

Username:

Password:

Remember me

Use another login method

After successfully logging in, the current user's name will be displayed. The **Logout** button becomes accessible.

#### Current user

Logged in as Administrator

In the **Target archive** dropdown list, select one of the previously configured tenants, for which the Remote FA will be run. In the next tabs, only retentions and schedules that were configured for this tenant can be selected from the dropdown lists.

### Target archive

- MNEtest
- TestTenant

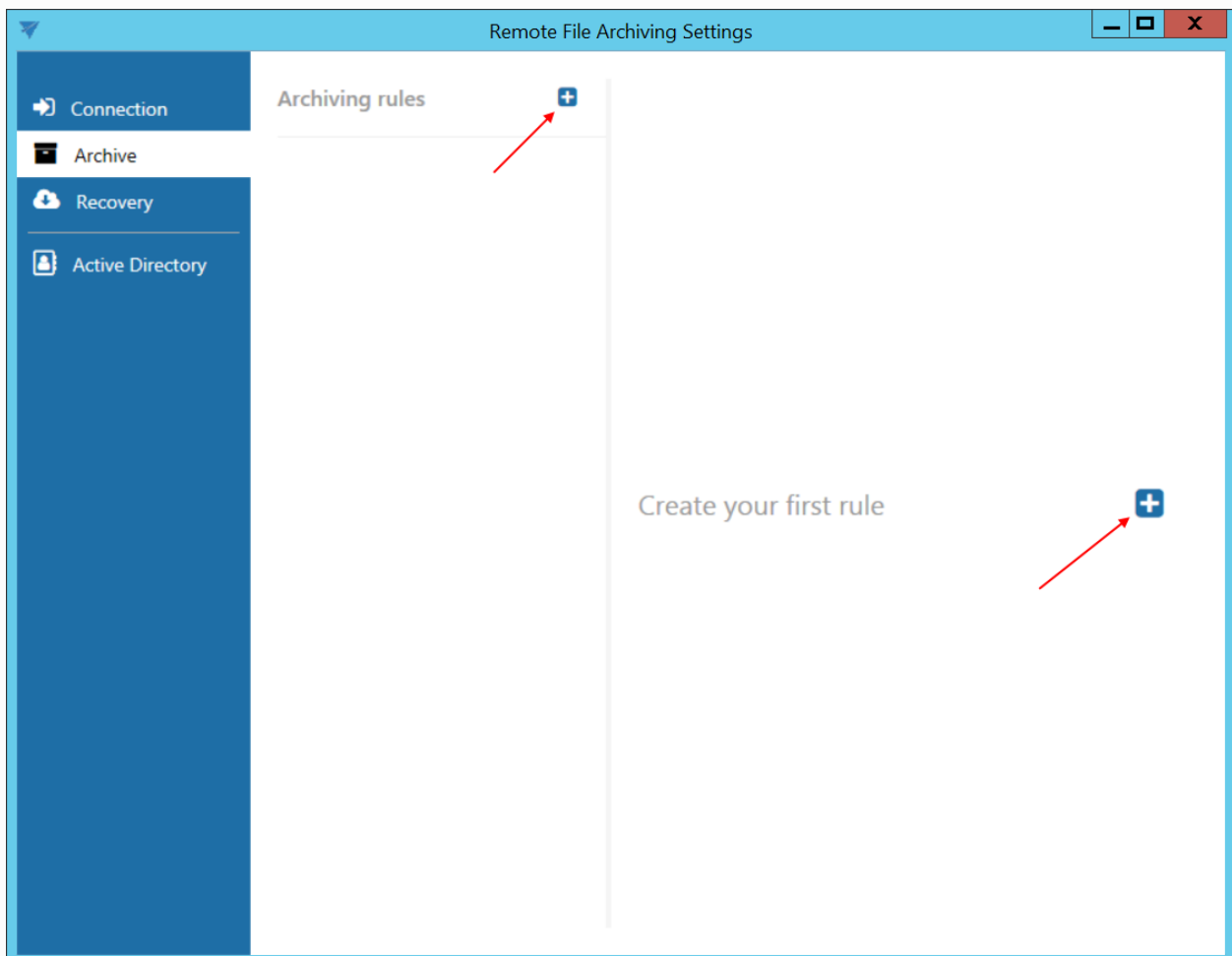
Save your settings.

**Note:** After selecting a tenant and saving the settings, it won't be possible to change the tenant.

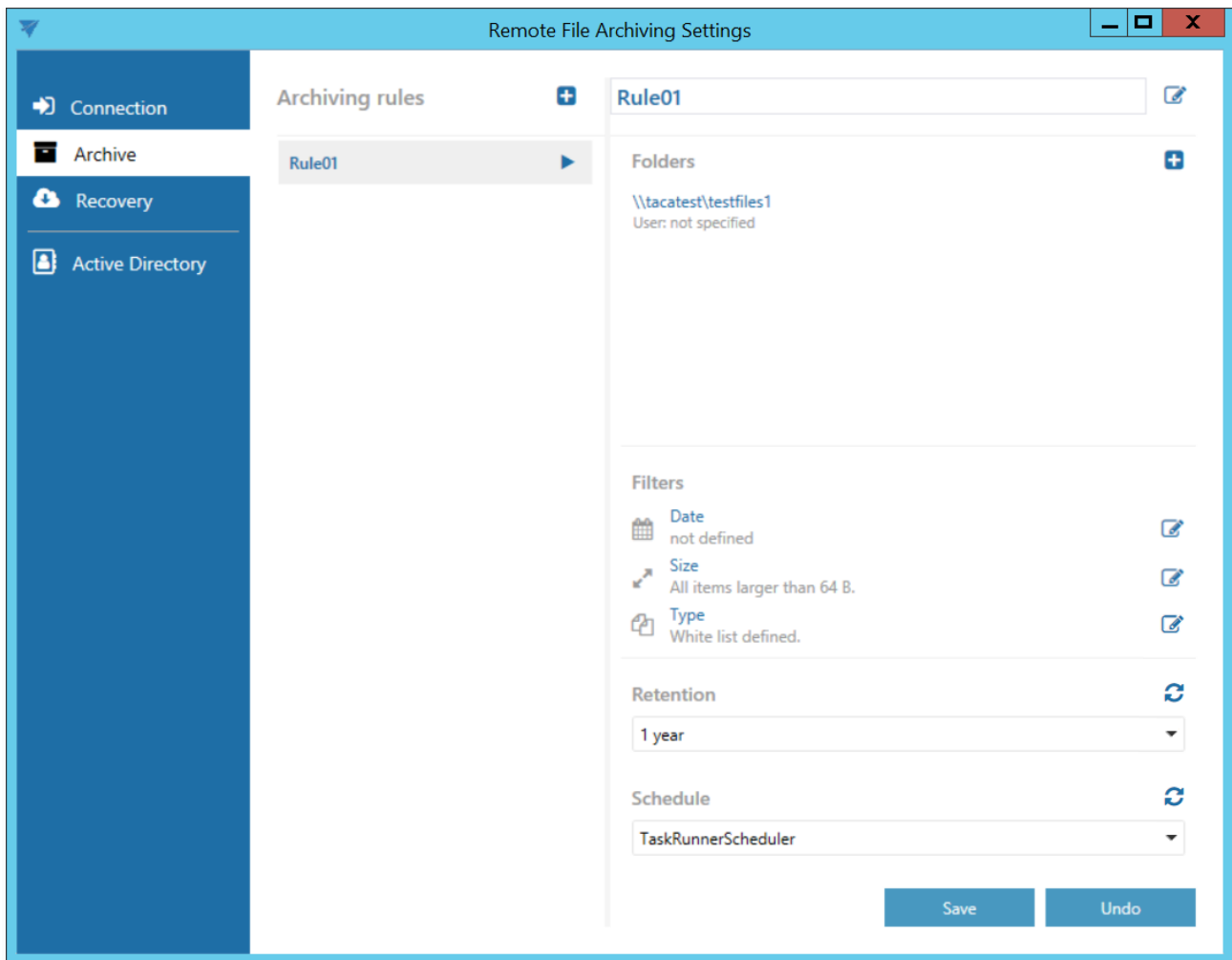
### Archive tab

The archiving rules can be configured on the archiving tab.


Add a new rule by clicking on the **+** button (the **+** button next to the **Create your first rule** is available only when creating the first rule).

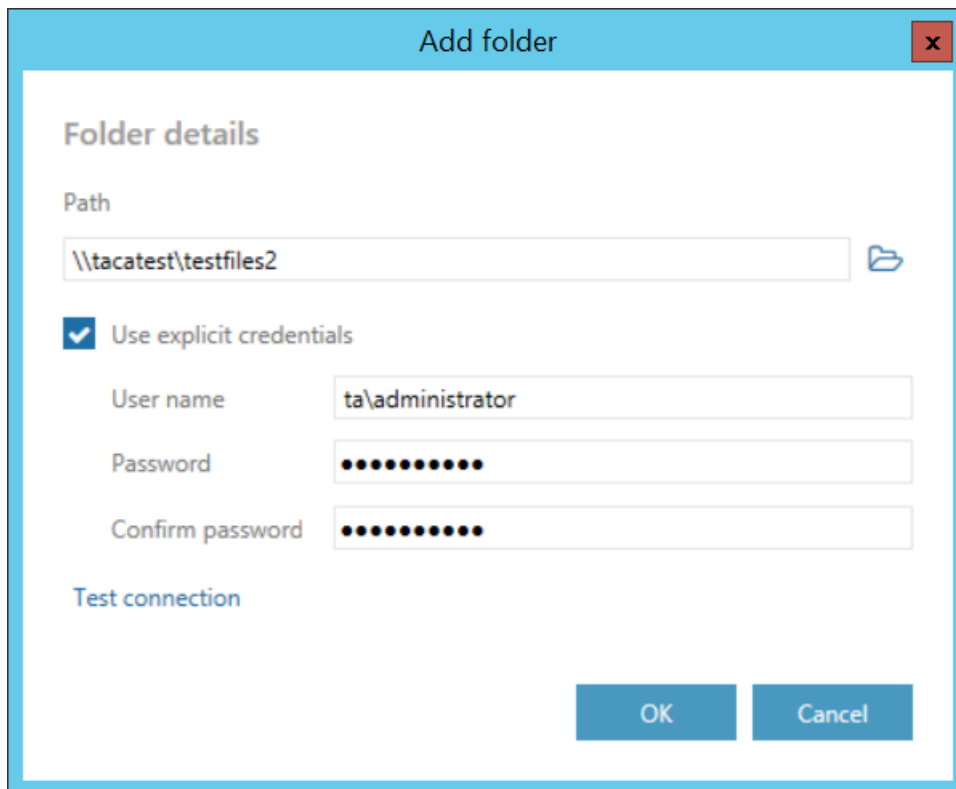



The archiving rules have very similar properties to [File archive jobs](#) in contentACCESS.



### ✓ Folders

In this section the user is required to select the remote share(s) where the data to be archived are located. Click on  to specify the folder to be archived.



Enter the UNC path of the folder to the **Path** textbox or click on the  Browse button and select the folder that you want to archive.

The **GATE.contentACCESS.RemoteFileArchiving.Agent** service is responsible for running the rules. The service is approaching the specified folder under account, under which the service is running. If the folder is accessible to the user running the service, the **Use explicit credentials** checkbox doesn't need to be checked. If the folder is **not** accessible to the user running the service, check the checkbox and enter the credentials of the user/account, which has access to the folder you want to archive.

**Note:** A folder cannot be assigned to a single rule multiple times, so if the user will try to set a new archiving rule with the same folder assigned multiple times, he will get an error when saving the settings at the bottom of the Archive tab.

## ✓ Filters

### Date filter

With this filter the user may select files to process with a specific age. **Using the creation date or modification date for filtering:** By default the modification date is the determinative date, but this can be changed by checking the **“Use the creation date for filtering if it is younger than the modification date”** checkbox. In certain cases the creation date of a file is set to younger date than



the modification date of a file. This happens when a file is copied to another external disk (for example from disk G to disk I). In this case the creation date is set to the date of the copy action. If the user would like to use this file in the future and would not like to archive it, this enhancement can solve the problem. With this feature it is possible to exclude the file with the newer creation date from the archiving process.

The **Modification date** can be **Absolute** or **Relative**. If **Absolute** was chosen, the Remote FA will process files younger/older than the specified date or files with date from the interval set. If **Relative** was chosen, the Remote FA will process files that were created/modified the specified number of days/months/years before the run of the Remote FA. If **Process all files** is selected, the Modification date does not count.

Examples of **filtering**:

**Filter settings**

**File age filter**

- Process all files
- Process files modified before the specified date
- Process files modified after the specified date
- Process files modified between the specified dates

---

**Modification date**

- Absolute  
10/18/2017
- Relative  
0 days

---

Use the creation date for filtering if it is younger than the modification date

OK Cancel



Filter settings ✕

**File age filter**

- Process all files
- Process files modified before the specified date
- Process files modified after the specified date
- Process files modified between the specified dates

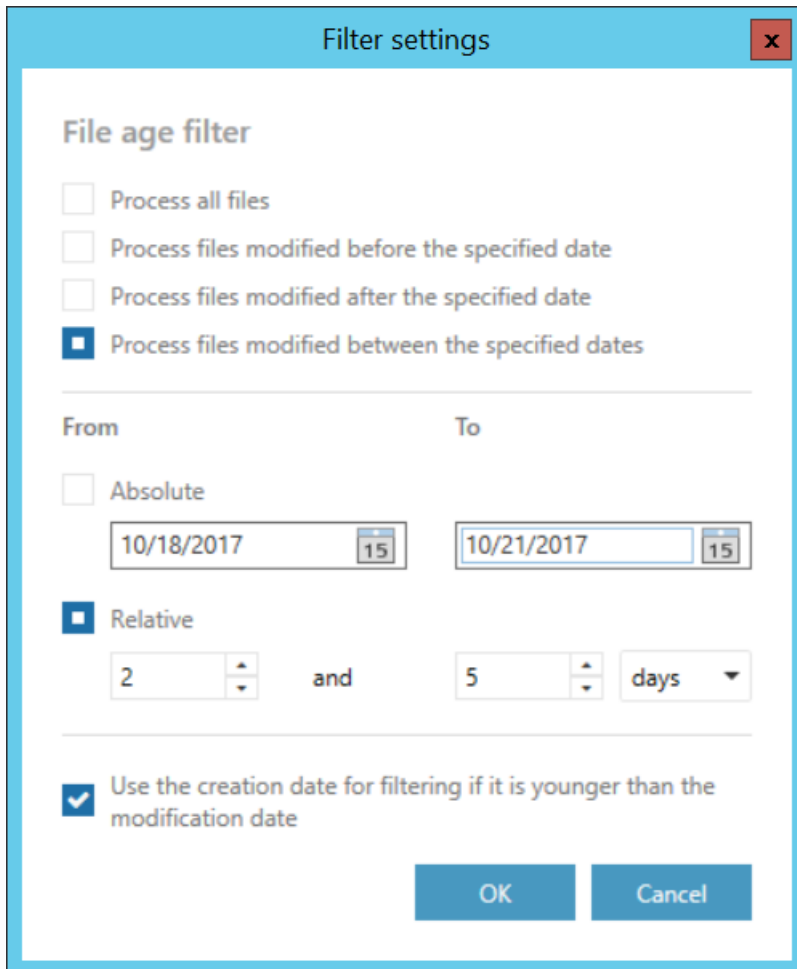
---

**Modification date**

- Absolute  
 15
- Relative  
 ▲ ▼

---

- Use the creation date for filtering if it is younger than the modification date



**Filter settings**

**File age filter**

Process all files

Process files modified before the specified date

Process files modified after the specified date

Process files modified between the specified dates

---

**From** **To**

Absolute

10/18/2017 15 10/21/2017 15

Relative

2 and 5 days

---

Use the creation date for filtering if it is younger than the modification date

OK Cancel

If the age filter has been set, click **OK**.

### Size filter

This filter can be very useful because it enables to find the biggest files and save space. You can choose from the filtering types (**All**, **Larger than**, **Smaller than**, or **Having size between**), enter the size in kilobytes, megabytes or gigabytes and click **OK**.

Examples of **filtering**:



**Filter settings** ✕

**File size filter**

Process all files

Process files larger than

0  KB

Process files smaller than

0  KB

Process files having size between

0  KB

0  KB

OK Cancel

**Filter settings** ✕

**File size filter**

Process all files

Process files larger than

0  KB

Process files smaller than

0  KB

Process files having size between

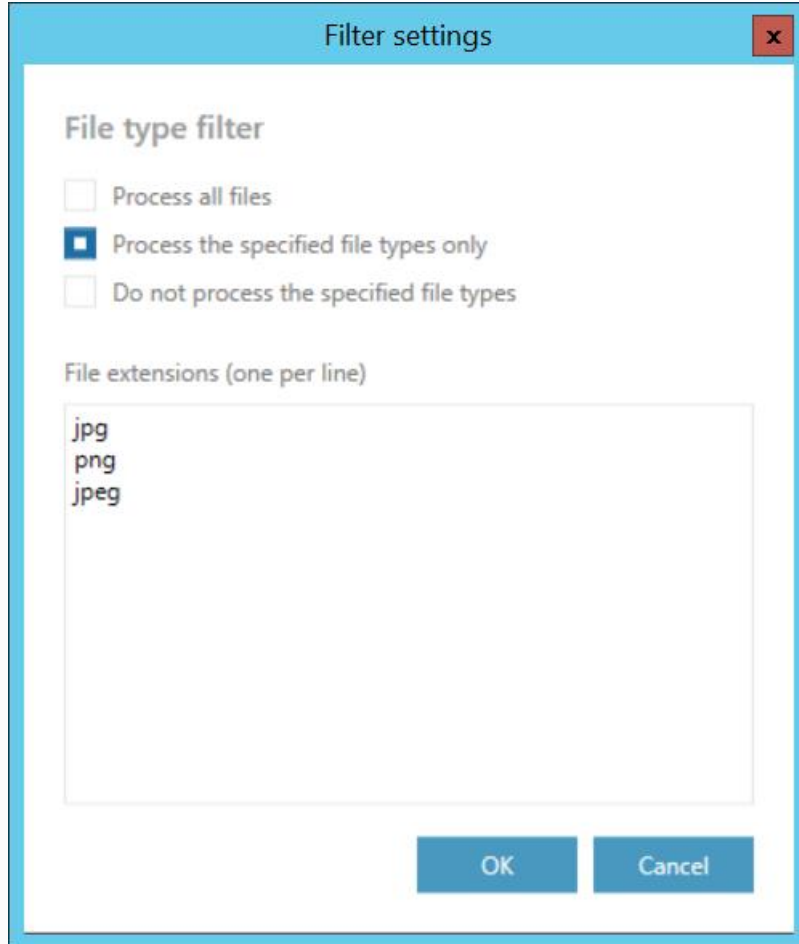
64  KB

2  MB


OK Cancel

## Type filter

This filter was improved to select certain file types for processing. The user may select and specify the file types, which will be/won't be processed.




## ✓ Retention

Under retention settings the user may select a previously configured time period from the dropdown list. During this time it will be disabled to delete the archived items from the storage. It is recommended to set here a time interval based on data recording regulations required either by the law of the country, or by internal company policies. It is possible to refresh the list of retentions by clicking on the  button.



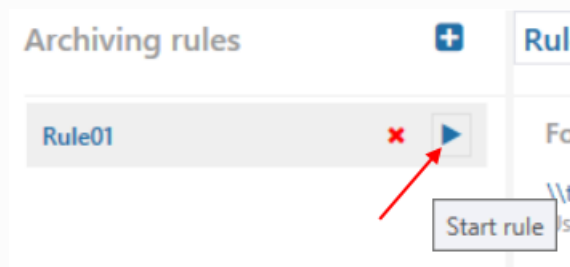
## ✓ Schedule



In this step the running times of the archive rule must be selected. It is possible to select only a schedule that was previously configured in contentACCESS. It is possible to refresh the list of schedules by clicking on the  button.





After setting all the parameters, save your settings. Start the rule by clicking on the button next to its name.

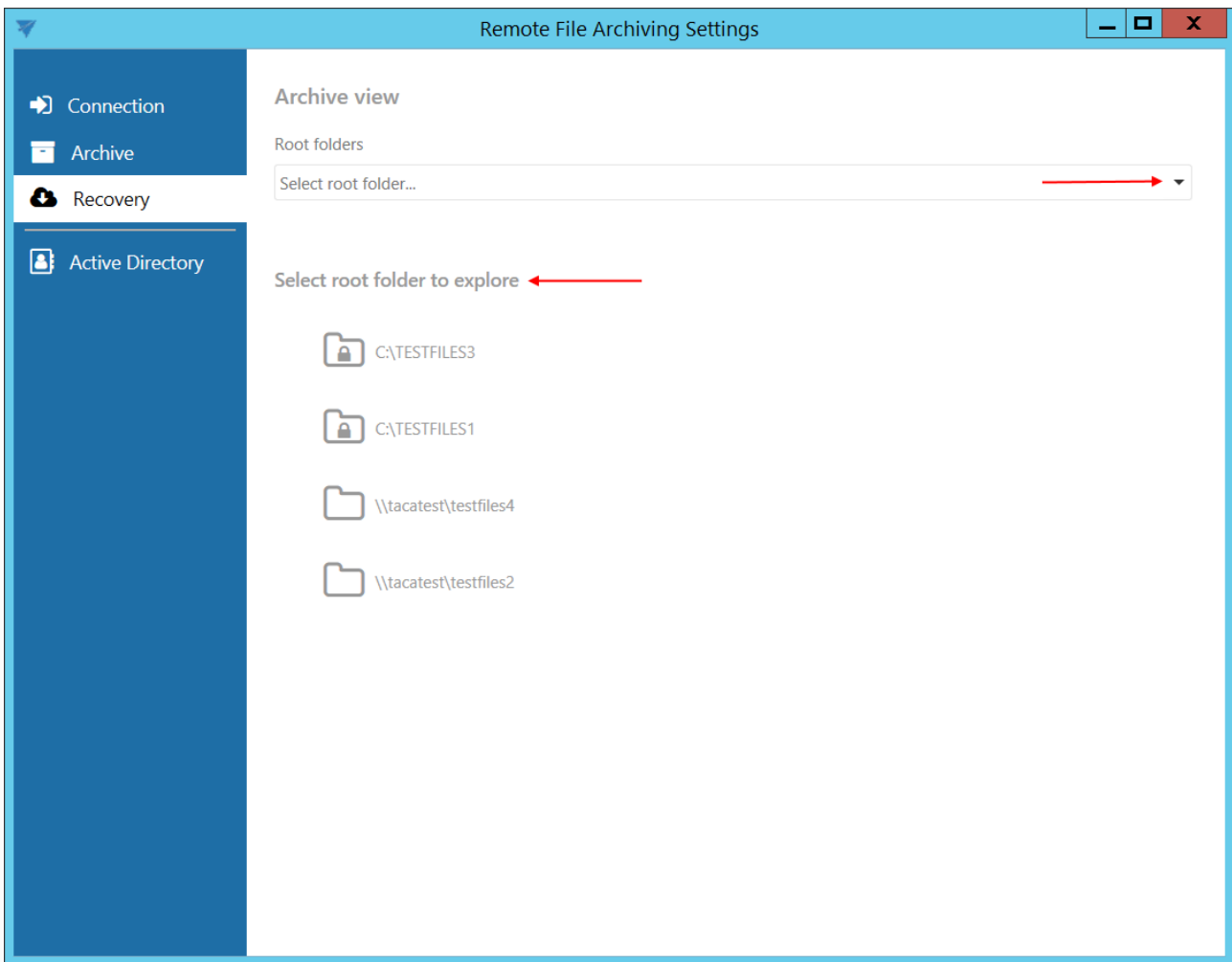


### Recovery tab

On this tab, the already archived folders can be explored. The view and actions are similar to those in [contentWEB](#).

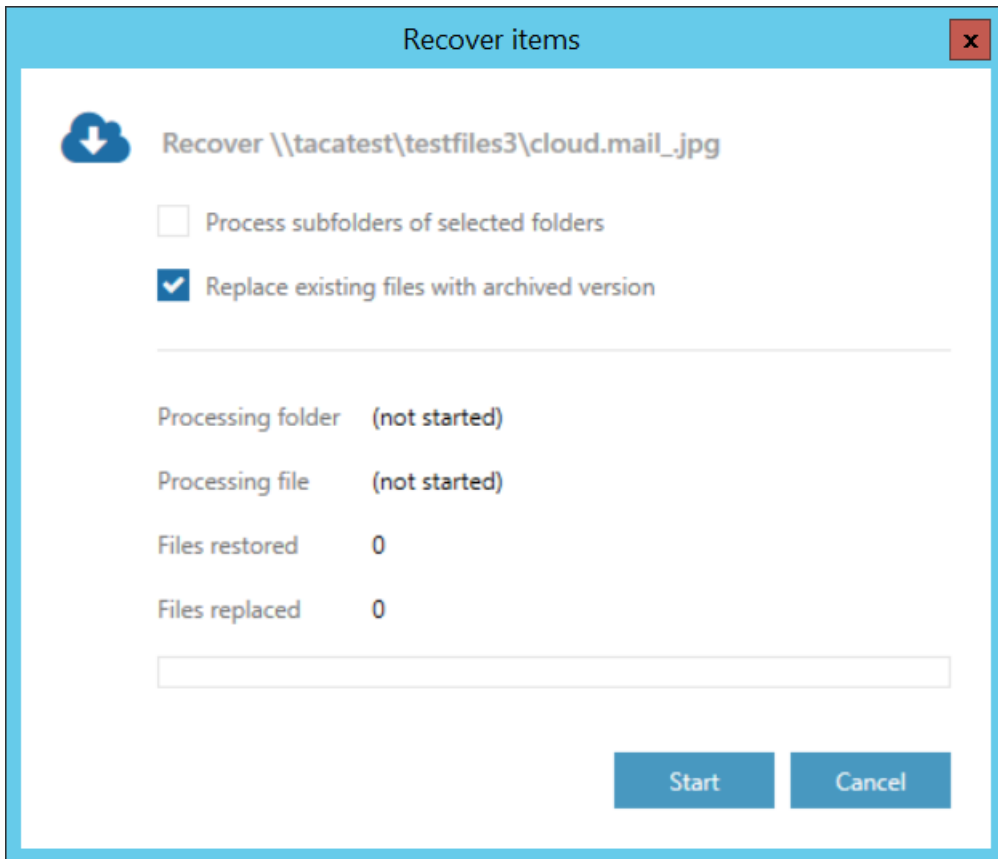
Select a root folder (archived folder) from the dropdown list or from the list under **Select root folder to explore**. The folders are marked as follows:

-  - fully accessible
-  - read only, created by other agent

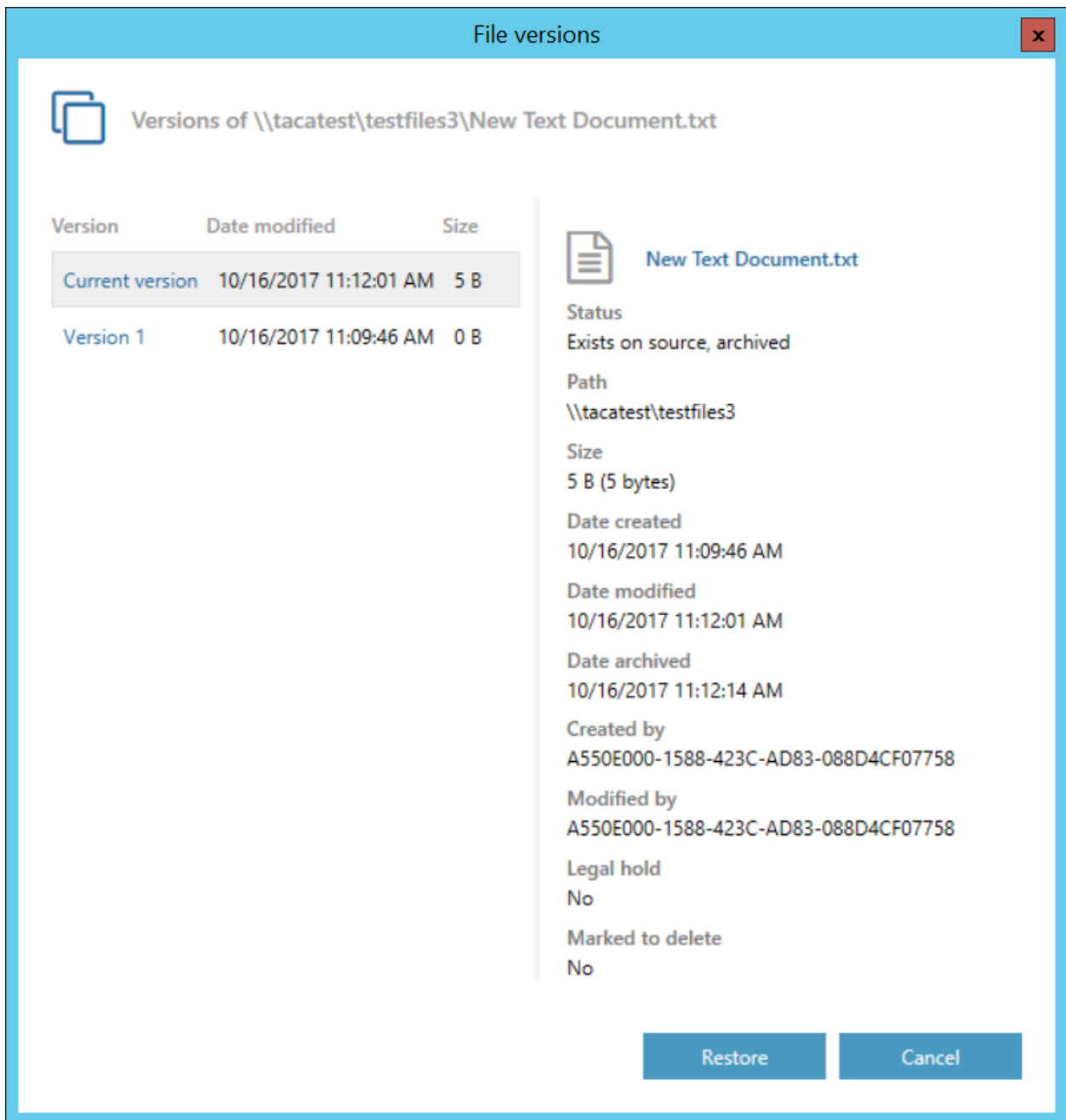


The following tasks are available:

- 1. Recover** – recover deleted files from the archive or restore file versions from the archive



2. Show versions – if the file has versions, this will show them



**3. Show properties** – shows properties of the selected item, like date, path, size, etc.

**Note:** Properties can be viewn also by clicking on the three dots button on the right side.

business and burgers.png	3/3/2017 12:32:49 PM	52 KB	
camera.png	6/21/2017 11:56:31 AM	647 KB	⋮
cloud.mail_jpg	2/7/2017 1:40:14 PM	15 KB	⋮
contentACCESS.Email_Archive.be_safe_1-1.jpg	1/20/2017 1:41:03 PM	135 KB	⋮
New Text Document.txt	10/16/2017 11:12:01 AM	5 B	

4. **Hide/show inactive items** - active/inactive item view can be applied from here

5. **Refresh** - the button is used to manually update the item list

Items are marked with different colors, depending on their availability:

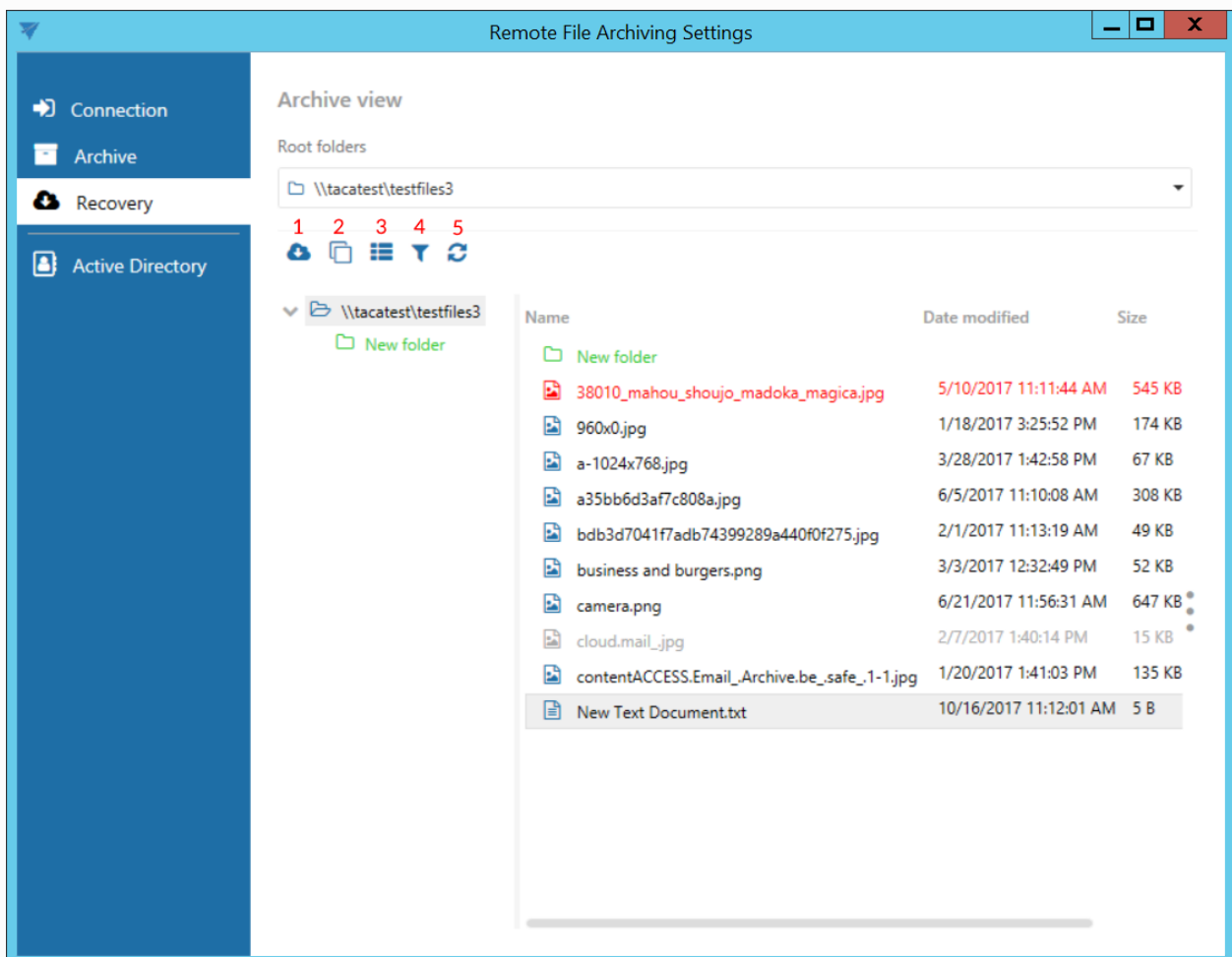
**Black** – item is available in the source location and also in the archive

**Red** – item is available only in the archive

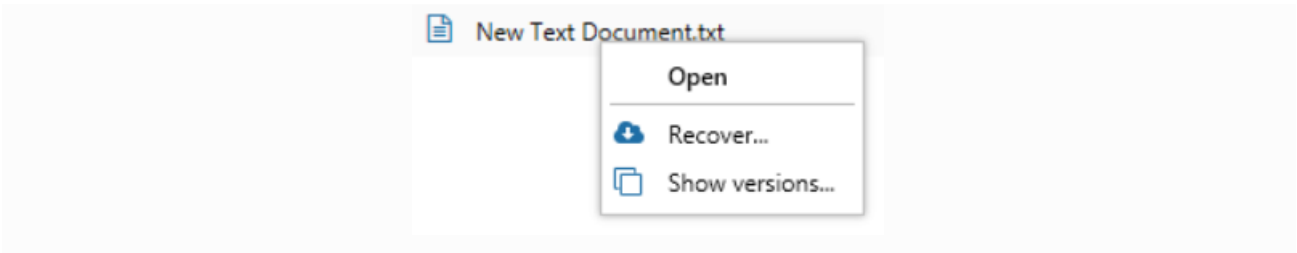
**Green** – item was not yet archived, available in the source location

**Gray** – inactive item - available in the source location, but was deleted from the archive

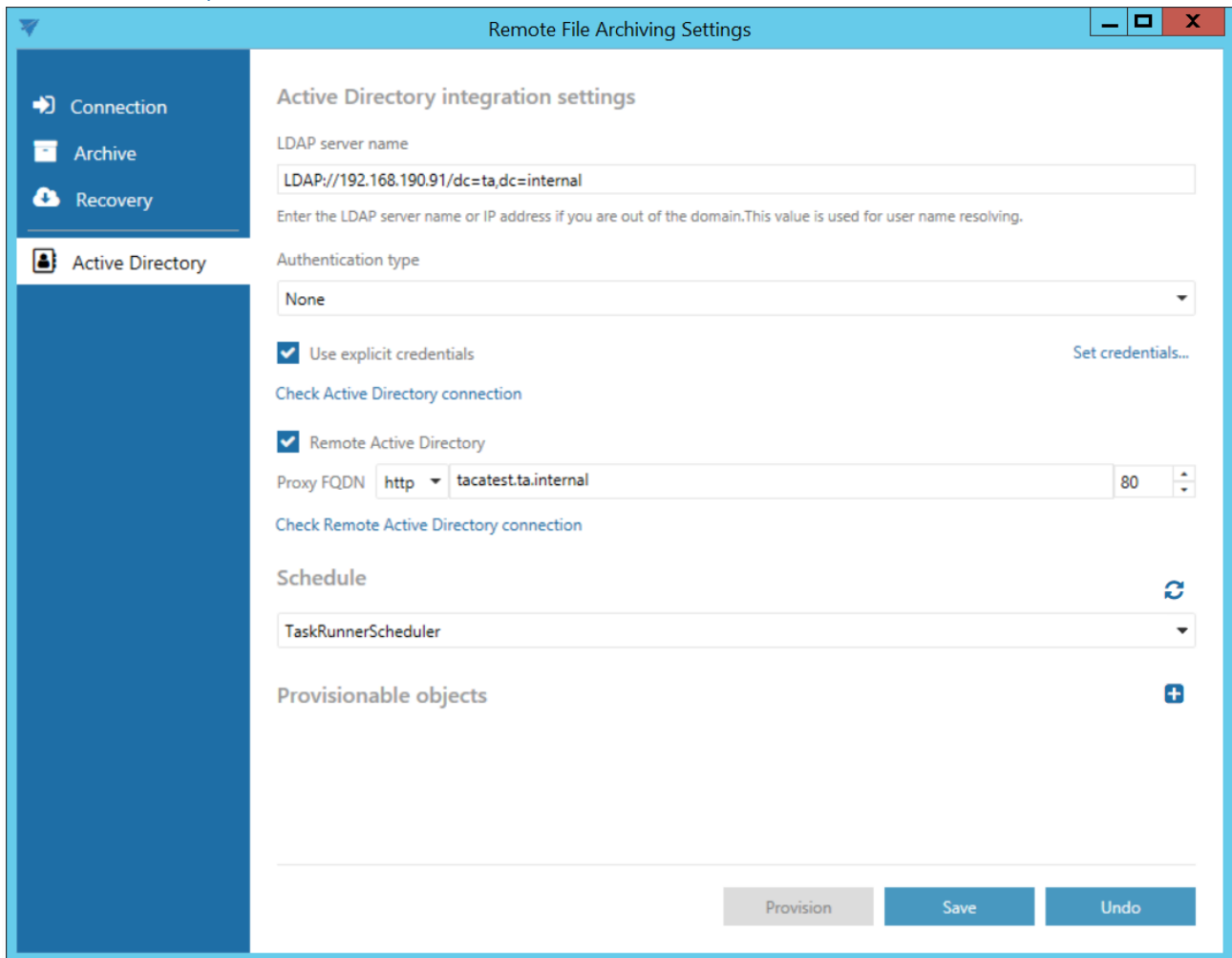
The selected item can be opened by double-clicking on it.



After right-clicking on an object, the context menu with available tasks opens.



## Active Directory tab



### Active directory integration settings

Some contentACCESS functionalities require LDAP connection.

Enter the required LDAP server name. If explicit credentials need to be used to connect to the active directory, check the **Use explicit credentials** checkbox and click on **Set credentials...** on the right.





LDAP server name

LDAP://192.168.190.91/dc=ta,dc=internal

Enter the LDAP server name or IP address if you are out of the domain. This value is used for user name resolving.

Authentication type

None

Use explicit credentials

Set credentials...

Check Active Directory connection

Enter the credentials and then click on **Check credentials** to verify if they are valid. If yes, click **OK**.

**Set credentials** ✕

**Enter credentials**

User name

ta\administrator

Password

●●●●●●●●

Confirm password

●●●●●●●●

Check credentials

OK
Cancel

Click on **Check Active Directory connection** to see, if everything was set correctly.

LDAP server name

LDAP://192.168.190.91/dc=ta,dc=internal

Enter the LDAP server name or IP address if you are out of the domain. This value is used for user name resolving.

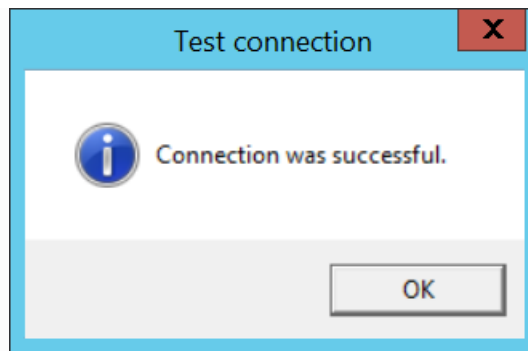
Authentication type

None

Use explicit credentials

Set credentials...

Check Active Directory connection

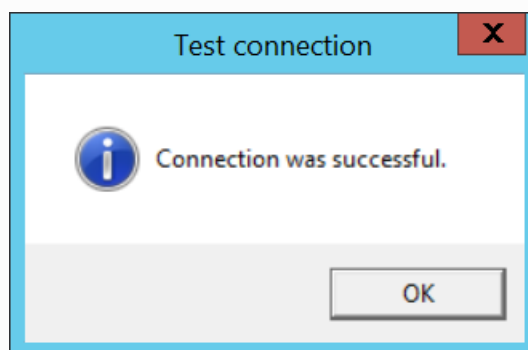


If the web service, through which the user needs to connect to the local active directory, is on a remote computer, check the **Remote Active Directory** checkbox. Enter the Proxy server FQDN (if you don't know how, copy the **Retrieve server FQDN** from contentACCESS [System](#) -> section **External accessibility settings**). Click on **Check Remote Active Directory connection** to see, if everything was set correctly.


Remote Active Directory

Proxy FQDN

[Check Remote Active Directory connection](#)



## Schedule

In this step the running times of the archive rule must be selected. It is possible to select only a schedule that was previously configured in contentACCESS. It is possible to refresh the list of schedules by clicking on the  button.

### Schedule



## Provisionable objects



The provisioning job synchronizes the Active directory with contentACCESS. When the provisioning job is started, it automatically **adds the new Active Directory users into contentACCESS** based on provisioning settings. The provisioned users will automatically get **log on rights for Remote FA** and the **External AD login provider** will be assigned to them.

**Note:** External AD login provider must be enabled in contentACCESS before provisioning.

To add object, click on **+** and specify the object(s) in the respective dialog. You can select a **group**, of which objects will be provisioned, or you can select an **Active Directory container**, and synchronize all users inside this container. Choose the object type and enter the data in the following format:

- in case of a **Group**: enter the name of the group
- in case of a **Container**: enter the distinguished name (DN)

**Add provisionable object**

**Provisionable object**

Select objects that will be automatically provisioned. You can select a group to synchronize its members or an Active Directory container to synchronize all users inside that container.

Object name

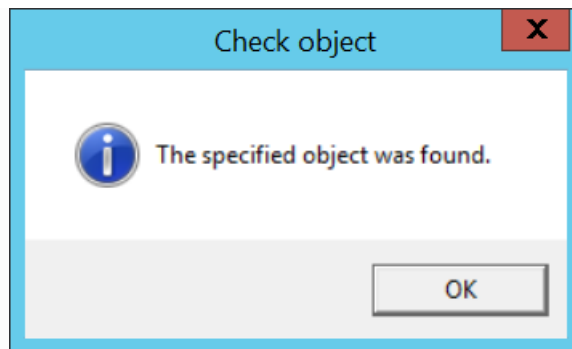
Example: Administrators or CN=Users,DC=domain,DC=com

Object type

[Check object](#)

**OK** **Cancel**

Click on **Check object** to verify if the specified object can be found.



**Note:** Do not specify some built-in groups (such as Domain Users, Users etc.) as provisionable objects. These groups use a computed mechanism based on the primary group of the user to determine membership and most probably will not contain any members by default.

After specifying the objects to be provisioned, click on **Save** and then on **Provision**. After the provisioning is finished, you can verify the created users and logins in [contentACCESS Central Administration](#).

#### Provisionable objects

Administrators  
Group

Provision

Save

Undo

