

contentACCESS Remote File archiving Manual - version 3.7



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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). It can be also used to upload PST files to contentACCESS server.

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

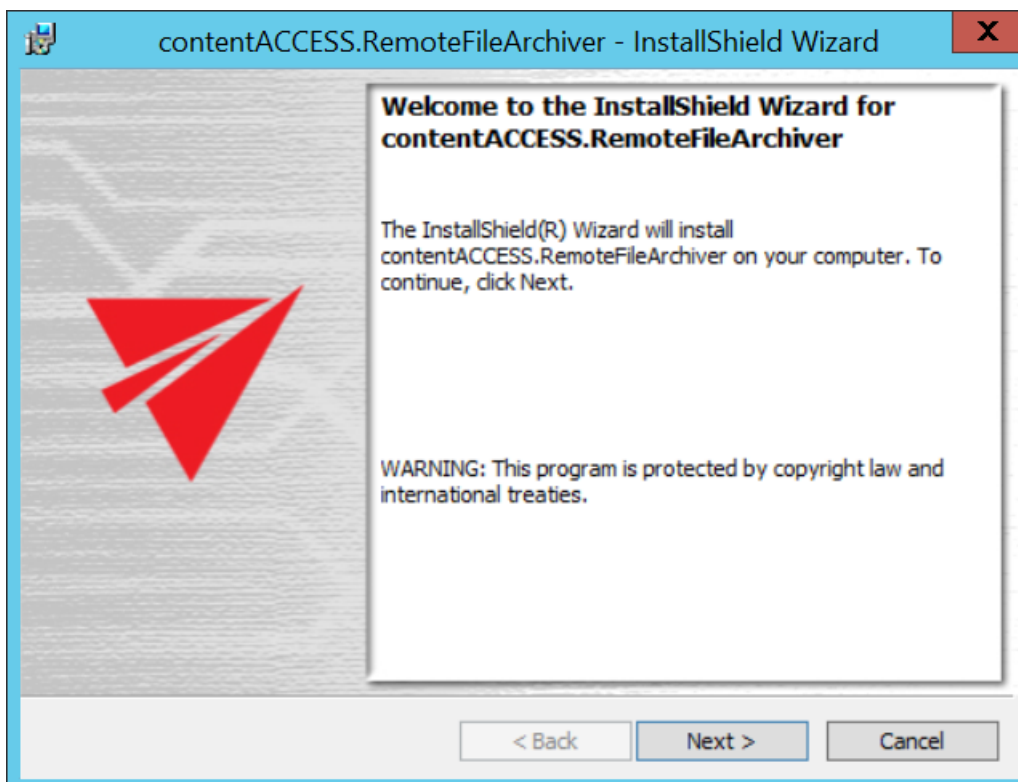
Installation

There are two ways to reach the setup:

- download it from the [Remote agents](#) tab in Central administration (**File archive** => Remote agents => Remote agents)
- download it from the [Remote agents](#) tab in Central administration (**Email archive** => Remote agents => Remote agents)

Run the setup. The installation process goes as follows:

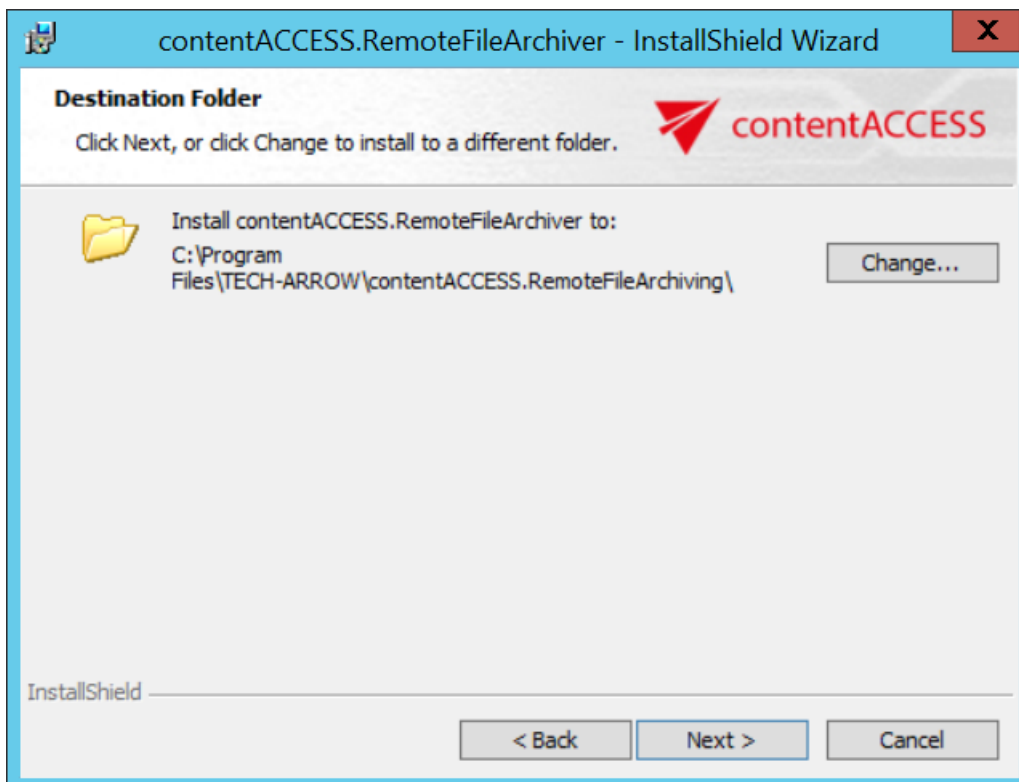
1. Click **Next**.



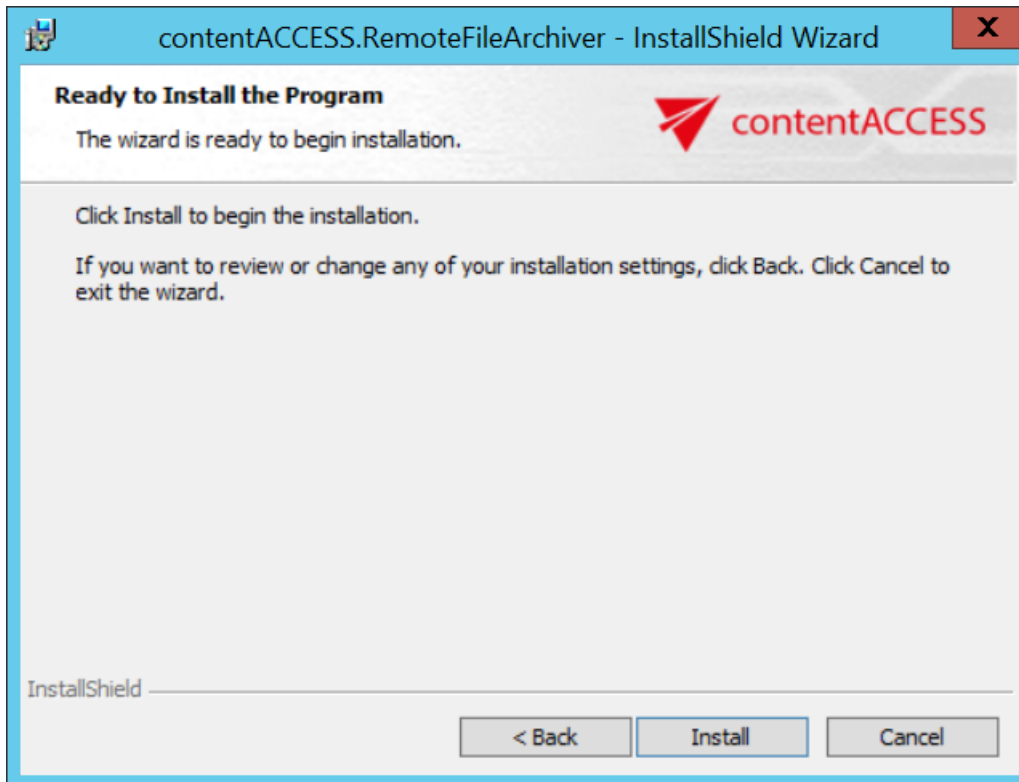
2. Choose **I accept the terms in the license agreement** and click **Next**.



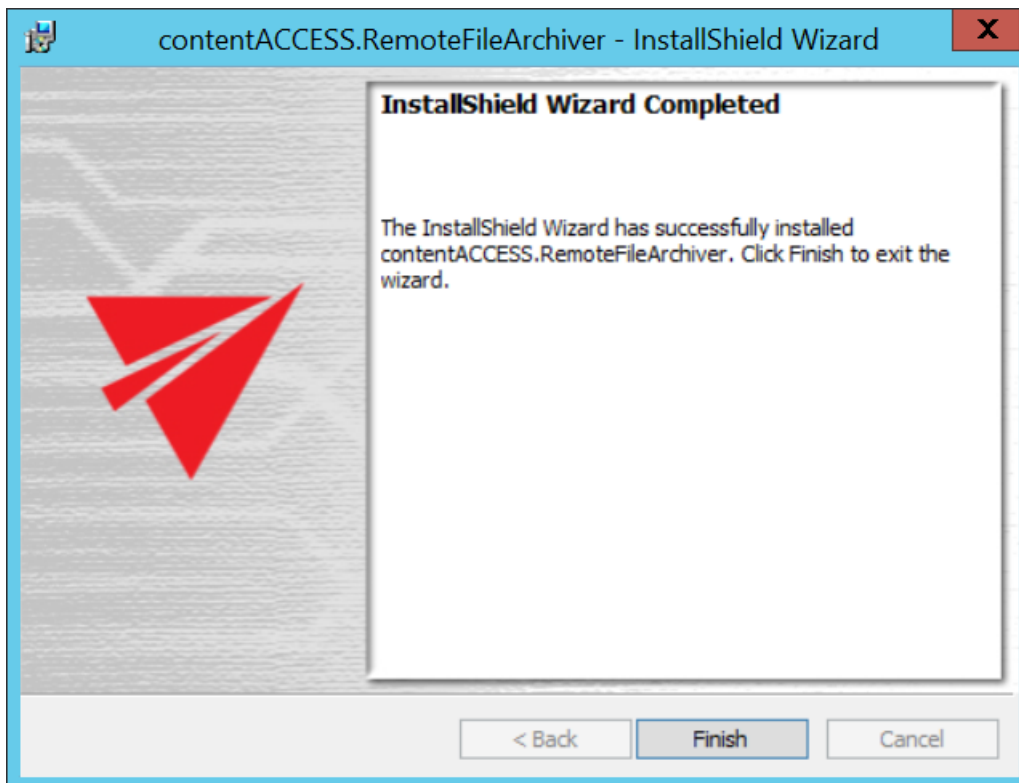
- Here you can choose the folder, to which Remote File Archiver (Remote FA further in text) will be installed. We recommend to leave it like this. Click **Next**.



- Click on **Install**.



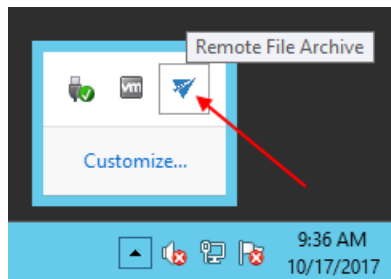
5. Click on **Finish** to complete the installation process.



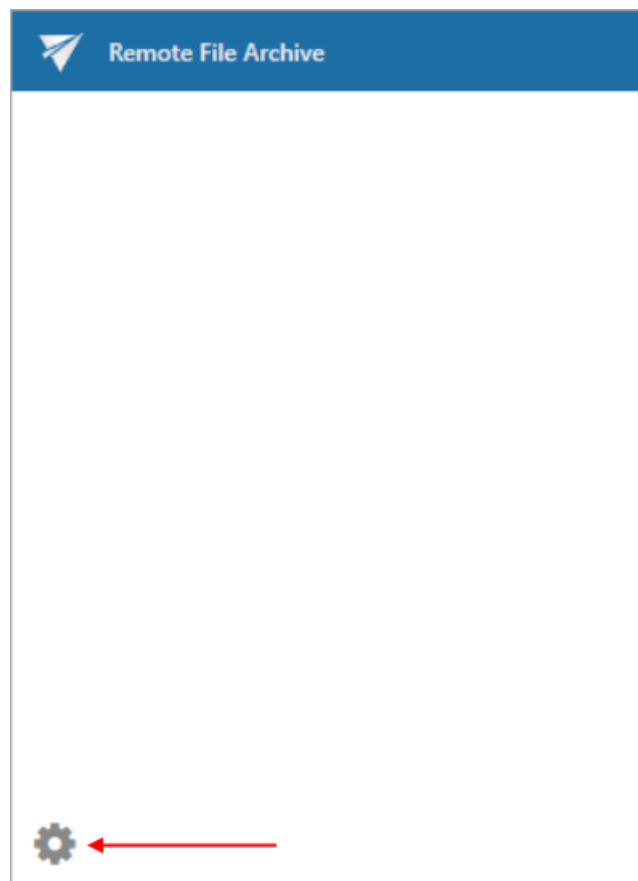


How to use the Remote File Archiver

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.

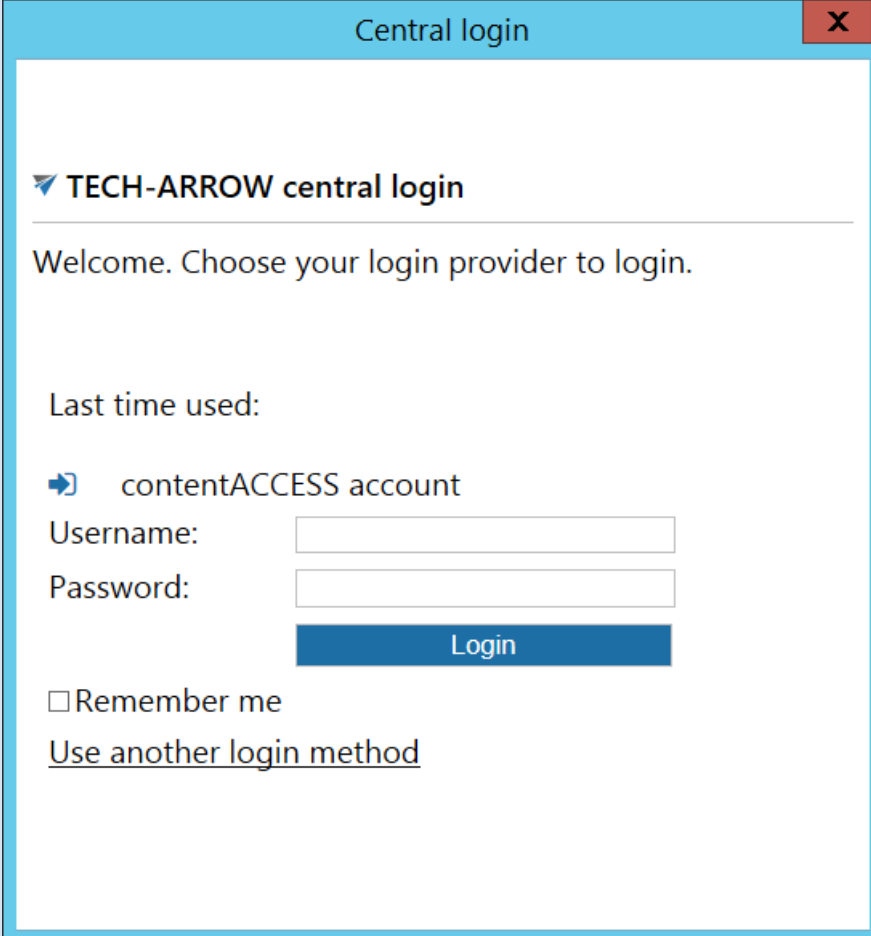


A pop-up window will open. Here it's possible to see the list of items archived by Remote FA (since we haven't archived any files yet, it is empty in our case). Click on the settings button to open the Remote FA settings. It is also possible to open the settings window by right-clicking on the icon and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

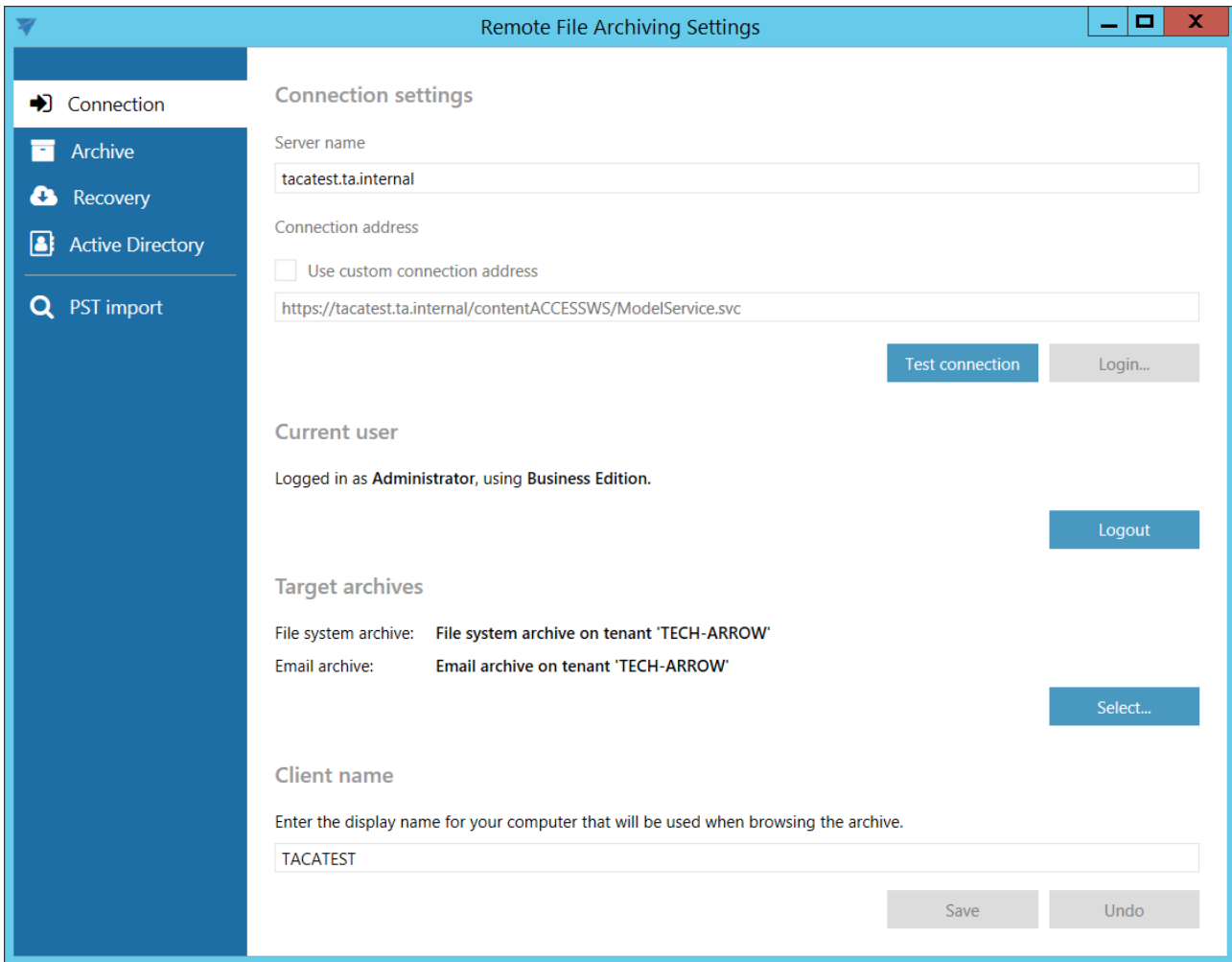
Login

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

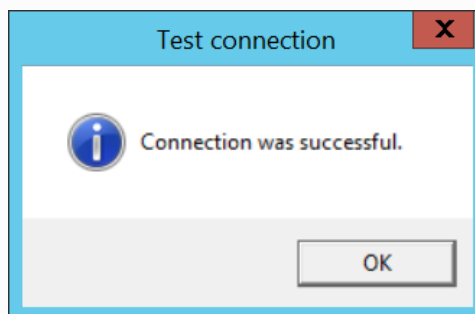


- Enter the HTTP connection URL with the correct server name into the **Custom connection address** field: [http://\[ServerName\]/contentACCESSWS/ModelService.svc](http://[ServerName]/contentACCESSWS/ModelService.svc) (or just delete the “s” from https)

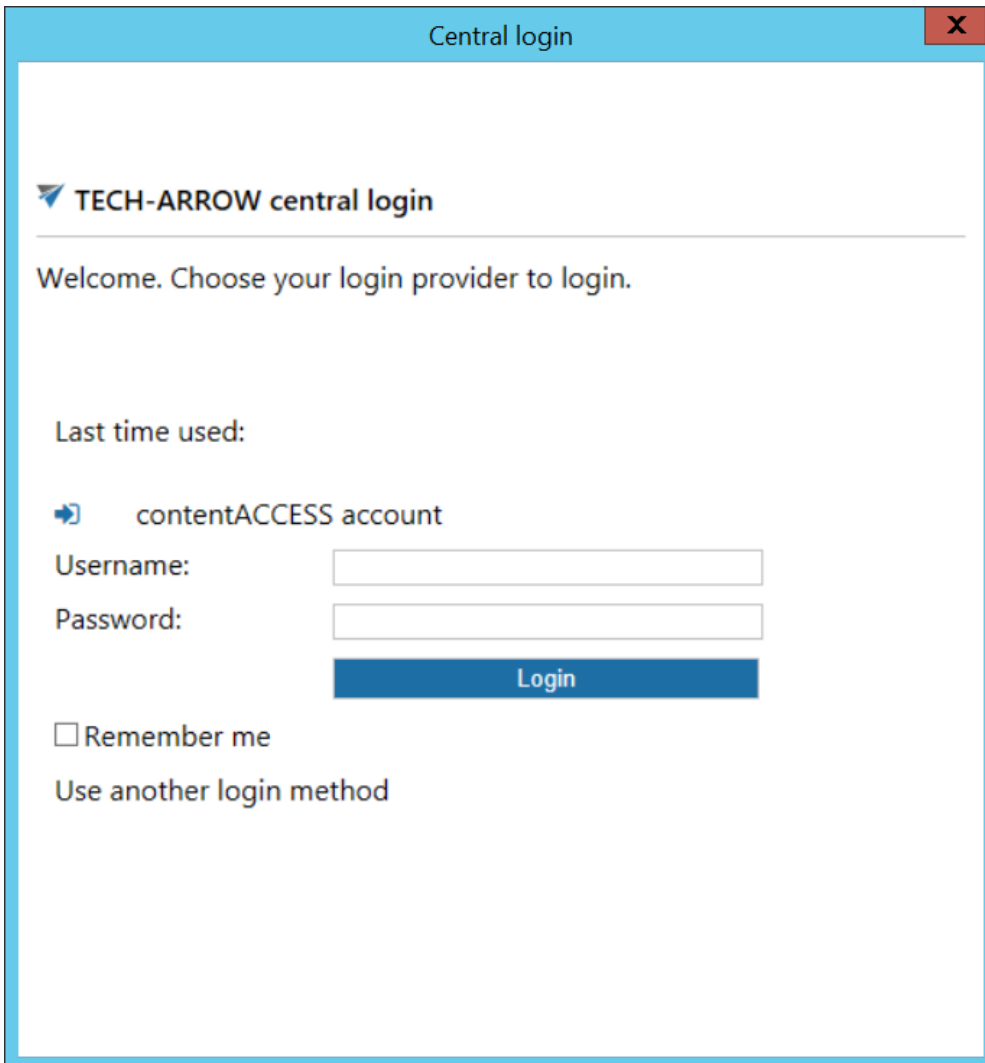
If you use direct connection to connect to contentACCESS (no proxy is installed), configure the connection as follows:

- 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

Welcome. Choose your login provider to login.

Last time used:

➔ contentACCESS account

Username:

Password:

Login

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**, using **Business Edition**.

Logout

In the **Target archive** section, click on the **Select...** button. If you want to use remote file archiving, check the **Enable file archiving** checkbox. From the archive dropdown list, select one of the **previously configured tenants** with **File system archive model**. From the respective dropdown lists, select one of the available **Databases**, one of the available **Storages** and one of the available **Index zones**.



If you want to use PST importing, check the **Enable PST importing** checkbox. From the archive dropdown list, select one of the **previously configured tenants** with **Email archive model**.

File archive is allowed by default for every tenant, **Email archive** must be first specifically allowed in the license. In the next tabs, only retentions and schedules that were configured for these tenants can be selected from the dropdown lists.

Important: The **Archive tab** and **PST finder tab** will be displayed depending on archives selected in this section – if no tenant with File system archive was selected here, **Archive tab won't be visible**; if no tenant with Email archive was selected here, **PST finder tab won't be visible**.

Target archives

File system archive: **File system archive on tenant 'TECH-ARROW'**

Email archive: **Email archive on tenant 'TECH-ARROW'**

Select...

X
Select archiving targets

Select archiving targets

Enable file archiving

Select an existing archive where files will be stored.

File system archive on TECH-ARROW

↻

Database

MNEtestDB

↻

Store

TestingStorage

↻

Index zone

Default index zone

↻

Enable PST import

Select an existing archive where PST files will be imported.

Email archive on TECH-ARROW

↻

OK

Cancel

The **Client name** displays the name of the computer that will be shown when viewing the archive. It is possible to change it.

Client name

Enter the display name for your computer that will be used when browsing the archive.

TACATEST

Save your settings.

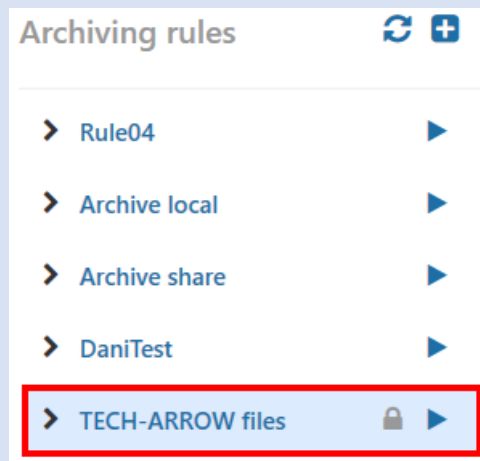


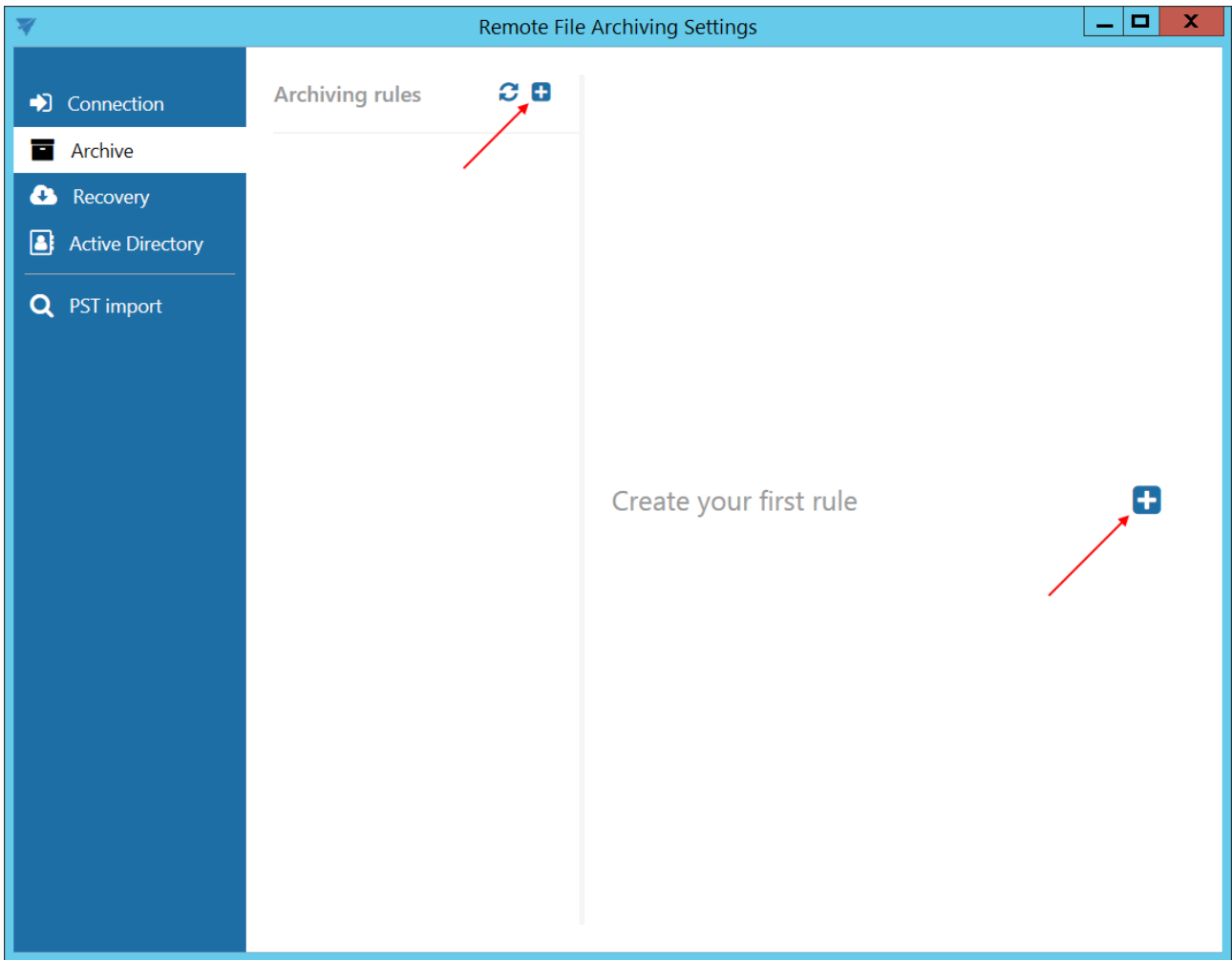
Archive tab

The archiving rules can be configured on the archiving tab.

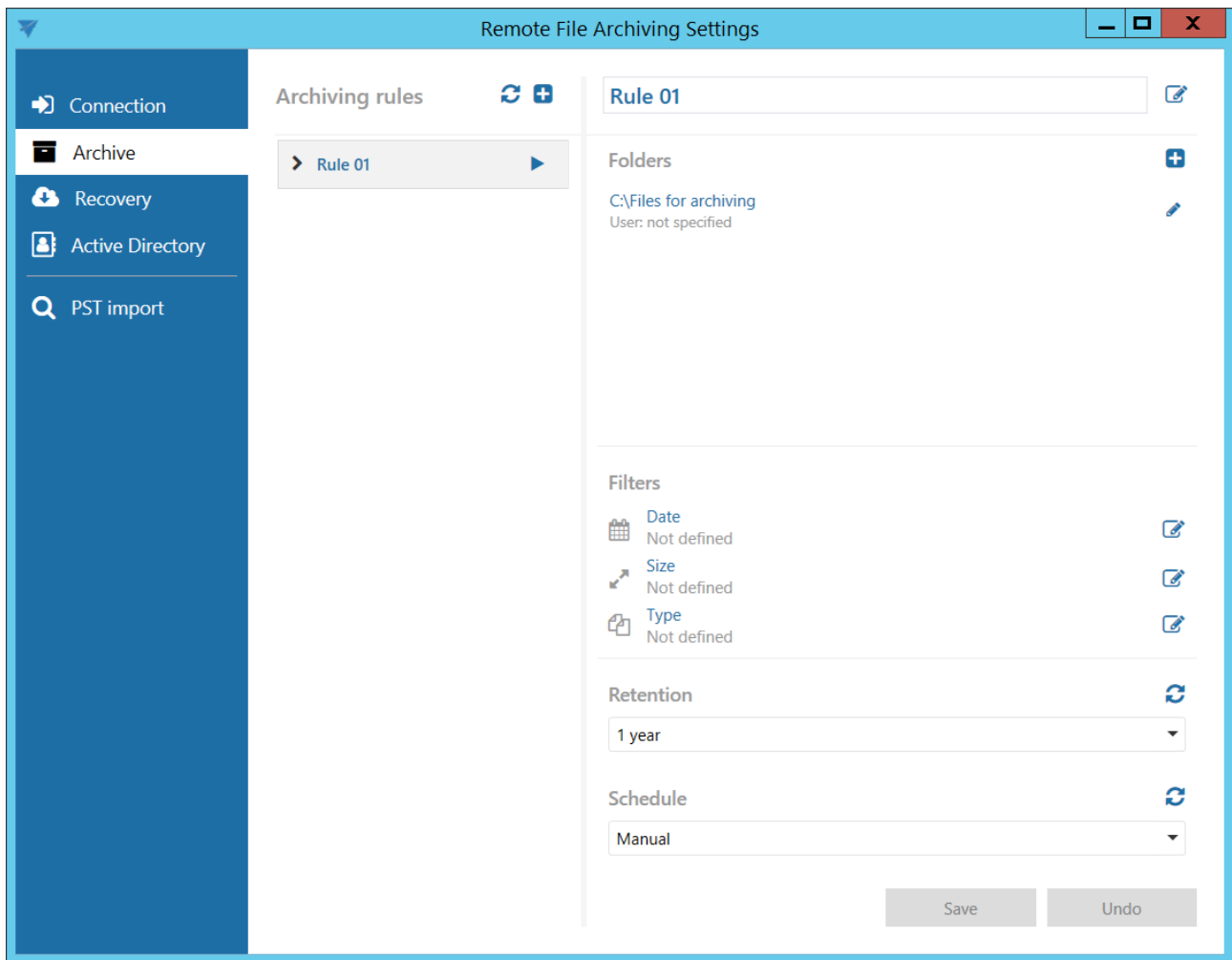
Add a new rule by clicking on the **+** button (the **+** button next to the **Create your first rule** is available only when creating the first rule).

Note: A new rule can be also added from **Central Administration**. To read more about this possibility, please check [this](#) section.




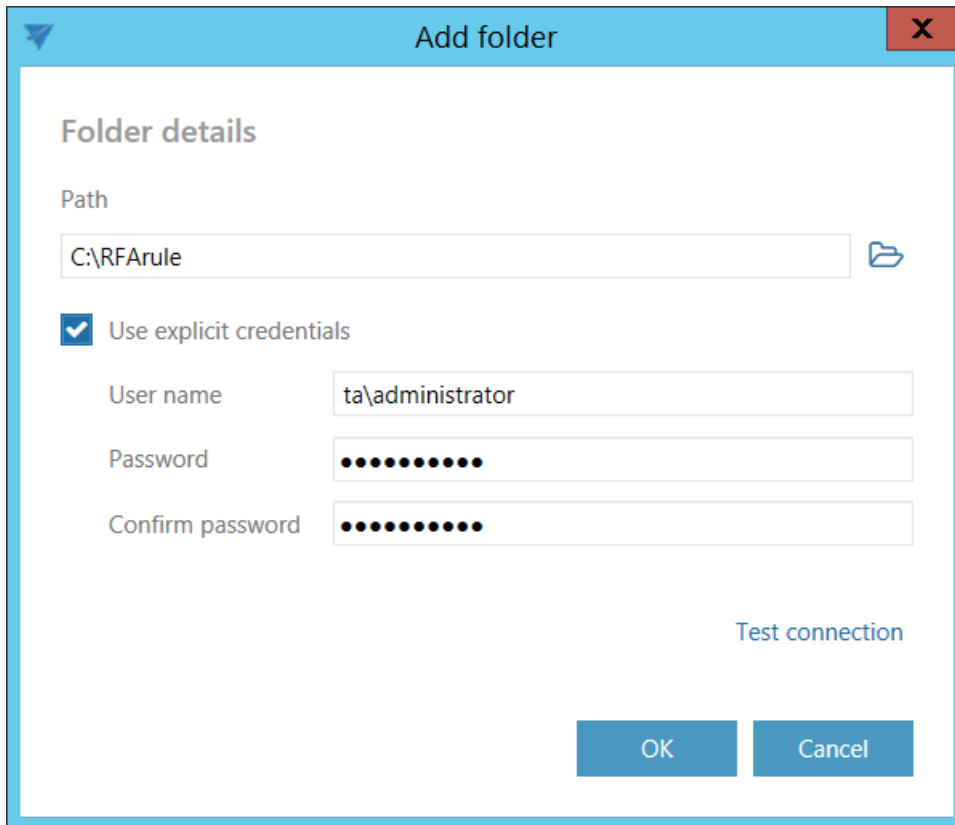



The archiving rules have very similar properties to [File archive jobs](#) in contentACCESS.



✓ Folders

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



Enter the UNC path of the shared folder or path of a local 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

Absolute

10/18/2017
15

To

Absolute

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 [x]

File size filter

Process all files

Process files larger than

0 [up/down] KB [v]

Process files smaller than

0 [up/down] KB [v]

Process files having size between

0 [up/down] KB [v]

0 [up/down] KB [v]

OK Cancel

Filter settings [x]

File size filter

Process all files

Process files larger than

0 [up/down] KB [v]

Process files smaller than

0 [up/down] KB [v]

Process files having size between

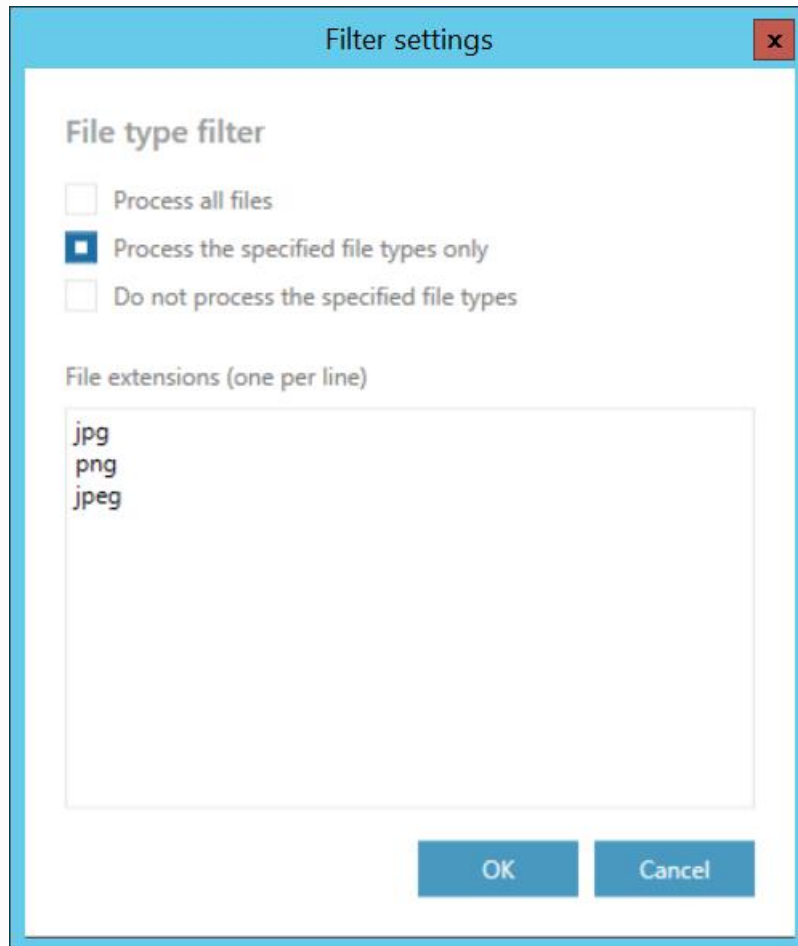
64 [up/down] KB [v]

2 [up/down] MB [v]


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.

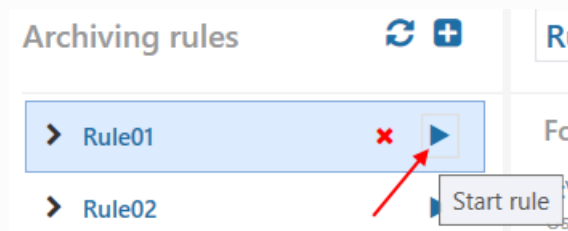


✓ Schedule

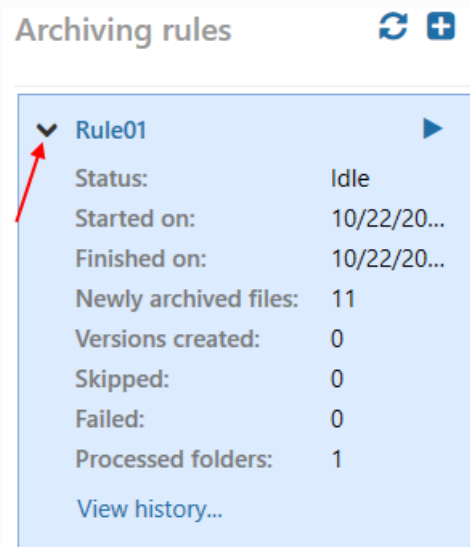
In this step the running times of the archive rule must be selected. It is possible to select only a schedule that was previously configured in contentACCESS. It is possible to refresh the list of schedules by clicking on the  button.



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



It is possible to view the details of the last run of the selected rule.



By clicking on [View history...](#), it is possible to view the last run of the rule in more details. The pop-up window will show exactly which file was newly archived, which file had a version created and which file couldn't be processed (was failed) on the respective tabs. The **general error** shows the error message if the rule suddenly crashed (connection fail etc.).

Execution history

-
□
X

Execution history of "Test"

Started on	6/14/2018 3:40:39 PM
Finished on	6/14/2018 3:40:48 PM
Duration	0:00:09
Processed folders	1
Skipped files	0
General error	None

Newly archived files (11)	Versions created (0)	Failed files (0)
Path	Date processed	Size
C:\00\microsoft-e1452011064246.jpg	6/14/2018 3:40:44 PM	230
C:\00\ms-office.jpg	6/14/2018 3:40:46 PM	21 K
C:\00\MS_cloud.jpg	6/14/2018 3:40:46 PM	81 K
C:\00\myca_185325812-small.jpg	6/14/2018 3:40:47 PM	172
C:\00\office-101-badge.png	6/14/2018 3:40:47 PM	4 KB
C:\00\office-insider-pc.jpg	6/14/2018 3:40:47 PM	43 K
C:\00\office-search.jpg	6/14/2018 3:40:47 PM	66 K
C:\00\pros-and-cons-2028471_1920-e1493803542700-300x179.jpg	6/14/2018 3:40:47 PM	14 K

Close

Recovery tab

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

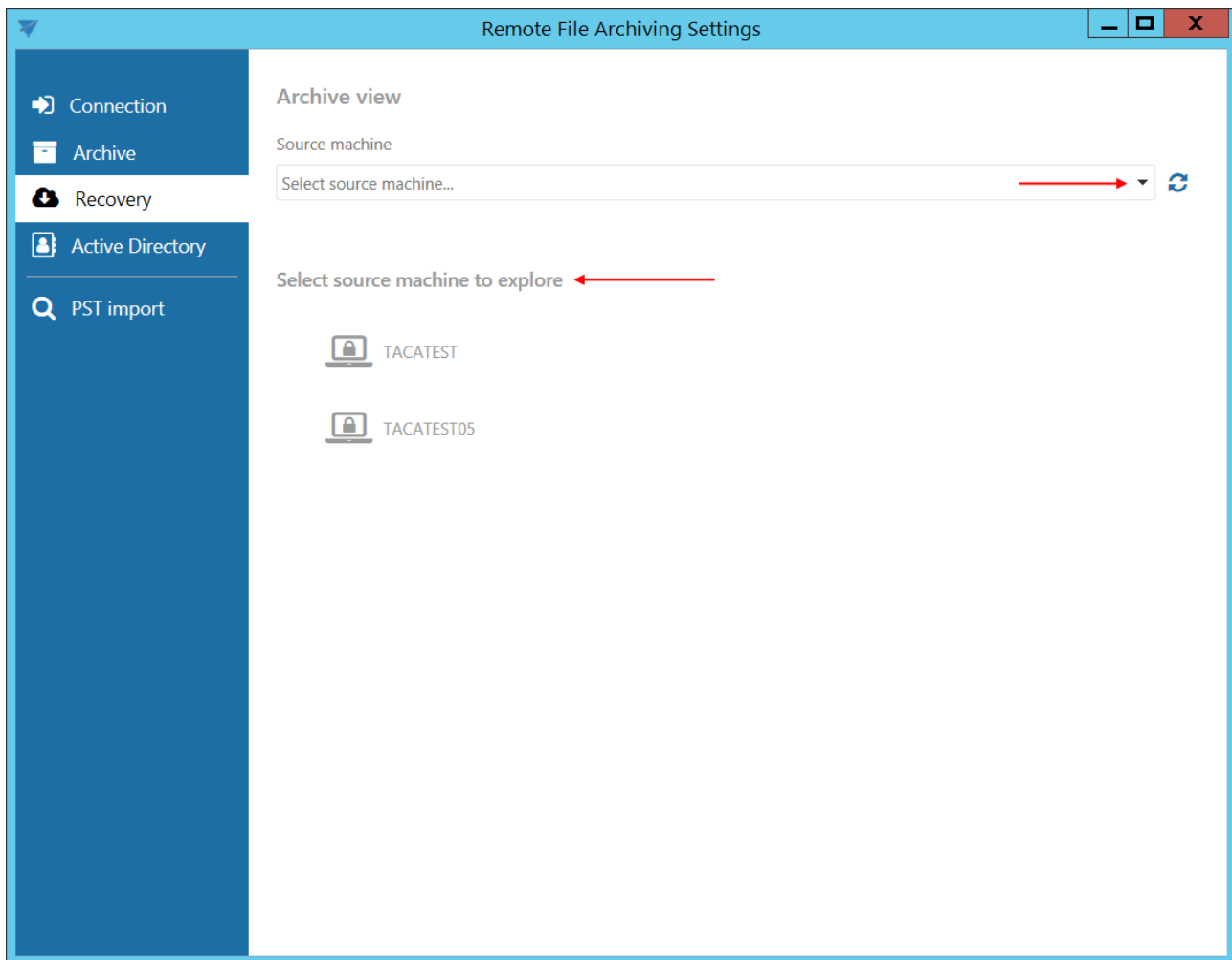
Select a source machine from the dropdown list or from the list under **Select source machine to explore**. The machines are marked as follows:



- fully accessible




- read only, archived by other agent



The following tasks are available:

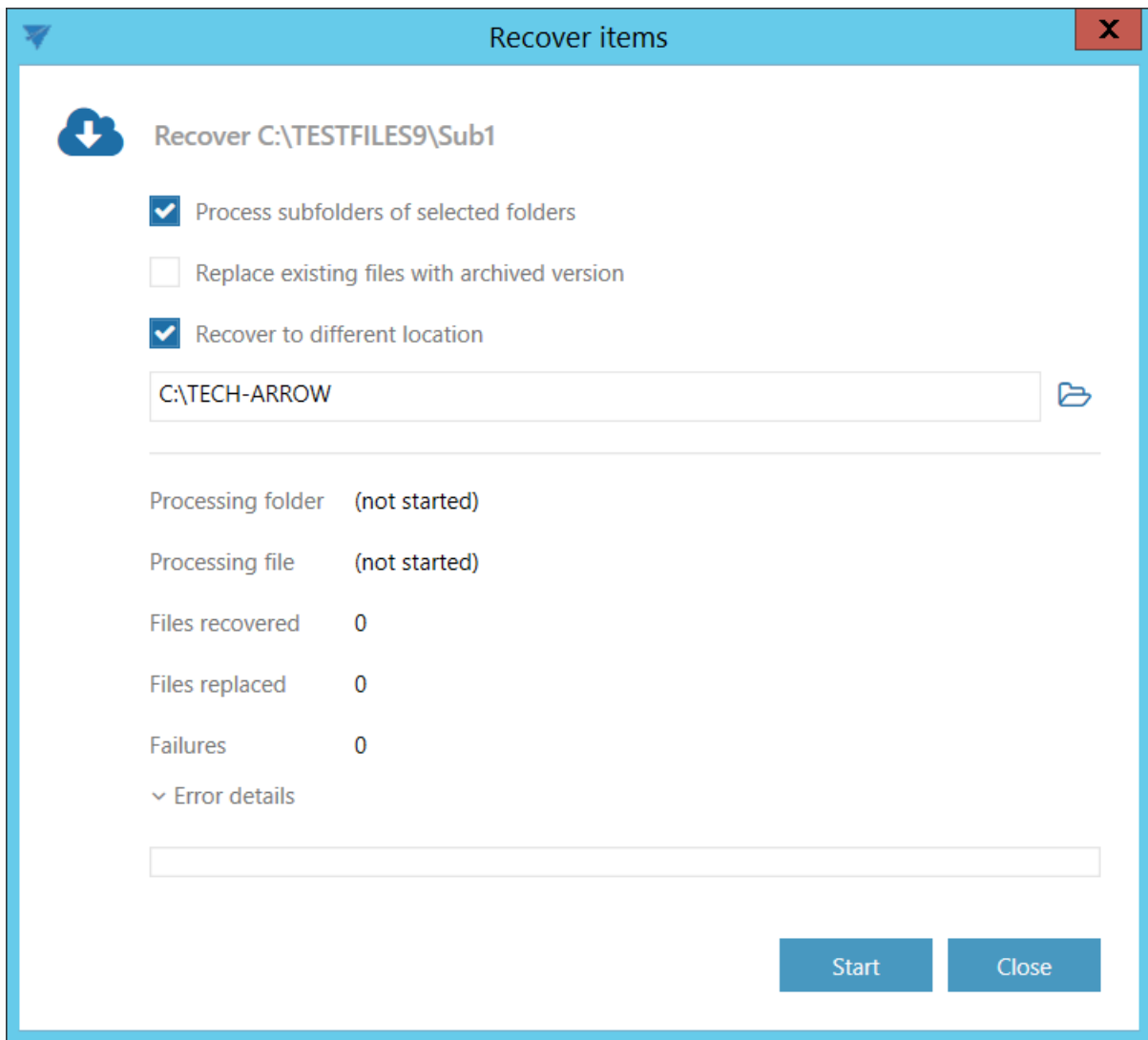
1. Recover – recover deleted files from the archive or restore file versions from the archive.

It is also possible to recover the files to location different from the original one. To do this, check the **Recover to different location** checkbox, enter the UNC path of the shared folder or path of a local folder to the textbox, or click on the  Browse button and select the target folder.

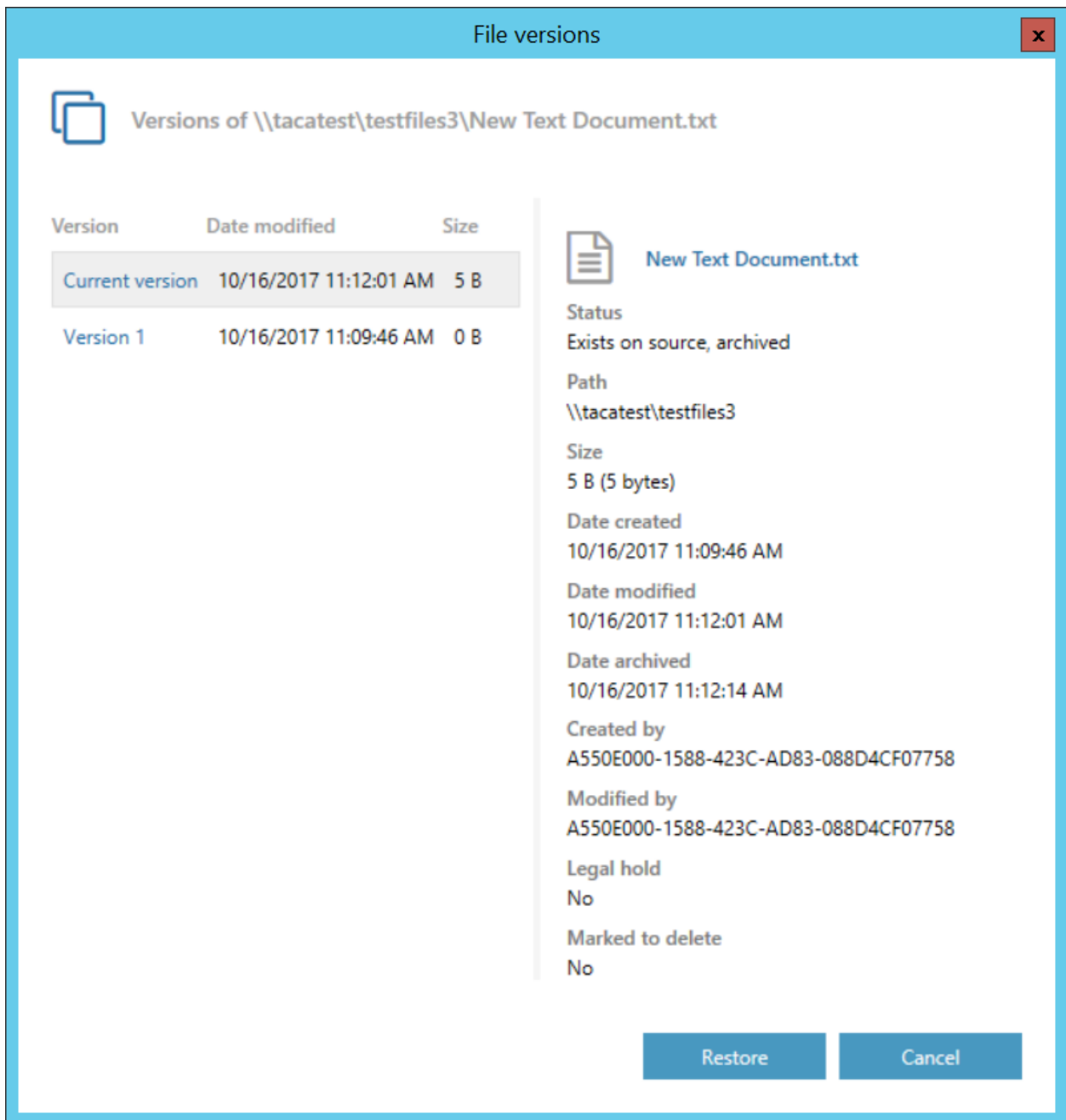
Note: The recover function works only for the files and folders selected on the right side, not for the folder structure on the left side.



Name	Date modified
Sub1	
Sub2	
38010_mahou.jpg	5/10/2017 1:11:44 F
960x0.jpg	1/18/2017 4:25:52 F
a35bb6d3af7c808a.jpg	6/5/2017 1:10:08 PI
Address book modifications.docx	1/22/2018 6:18:11 F
bdb3d7041f7adb74399289a440f0f275.jpg	2/1/2017 12:13:19 F
business and burgers.png	3/3/2017 1:32:49 PI
cloud.mail_.jpg	2/7/2017 2:40:14 PI
contentACCESS.Email_Archive.be_safe_1-1.jpg	1/20/2017 2:41:03 F
Testing.rar	1/19/2018 5:26:43 F
Versions testing.txt	6/20/2018 11:20:43



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:

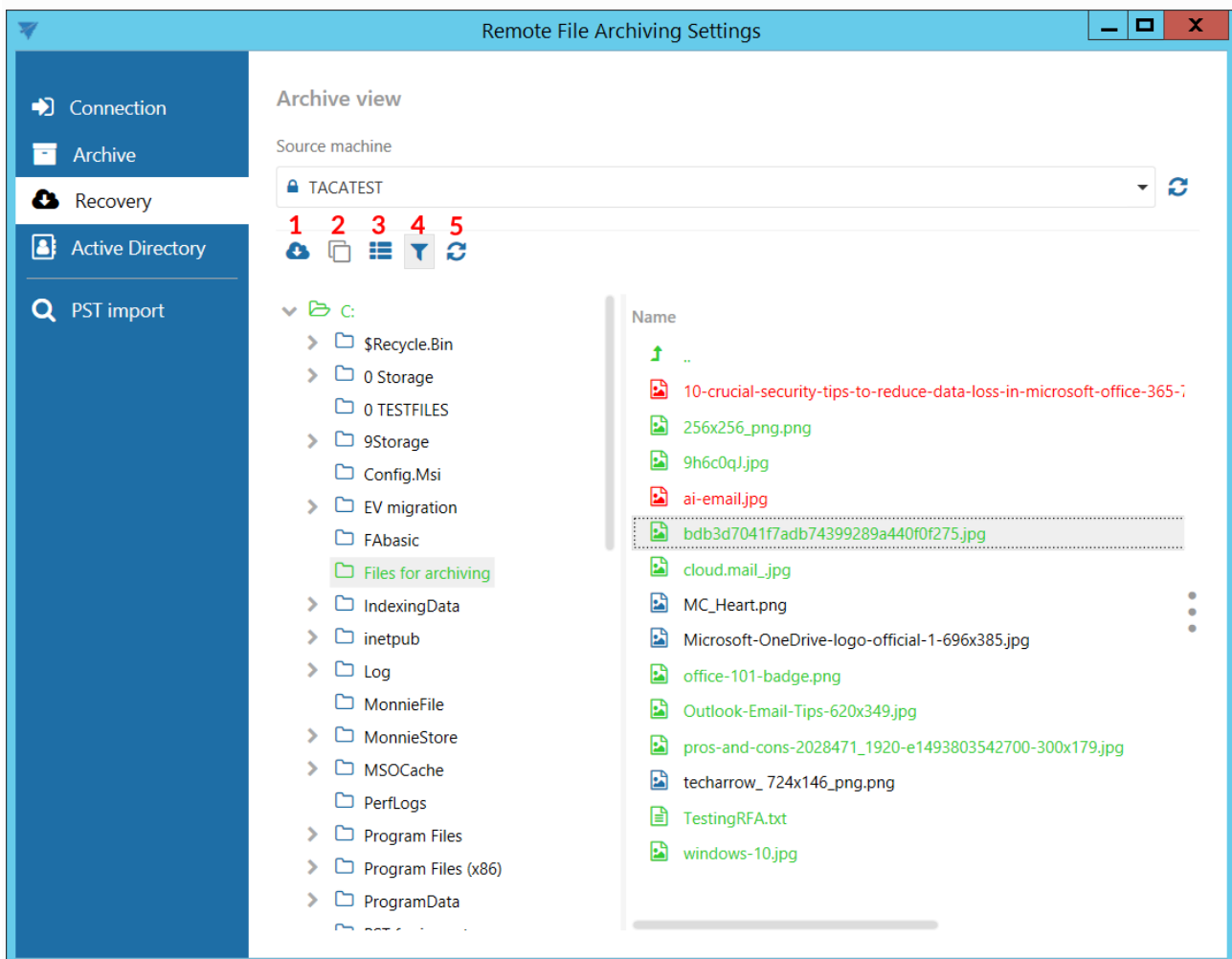
Black – item is available in the source location

Red – item is available only in the archive

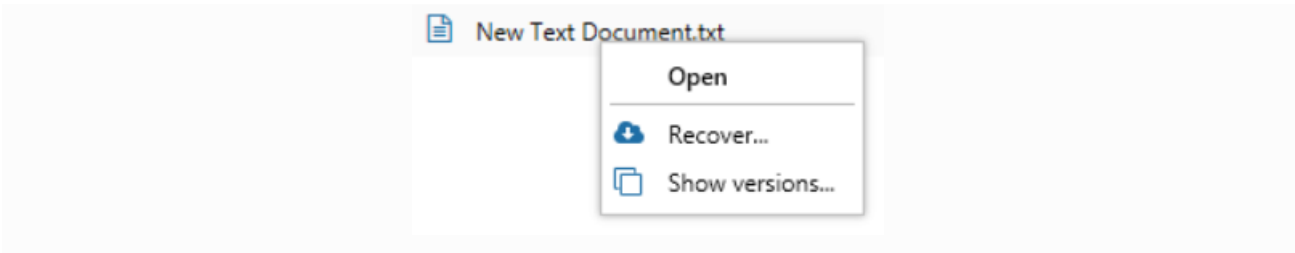
Green – item was archived, available also in the source location

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

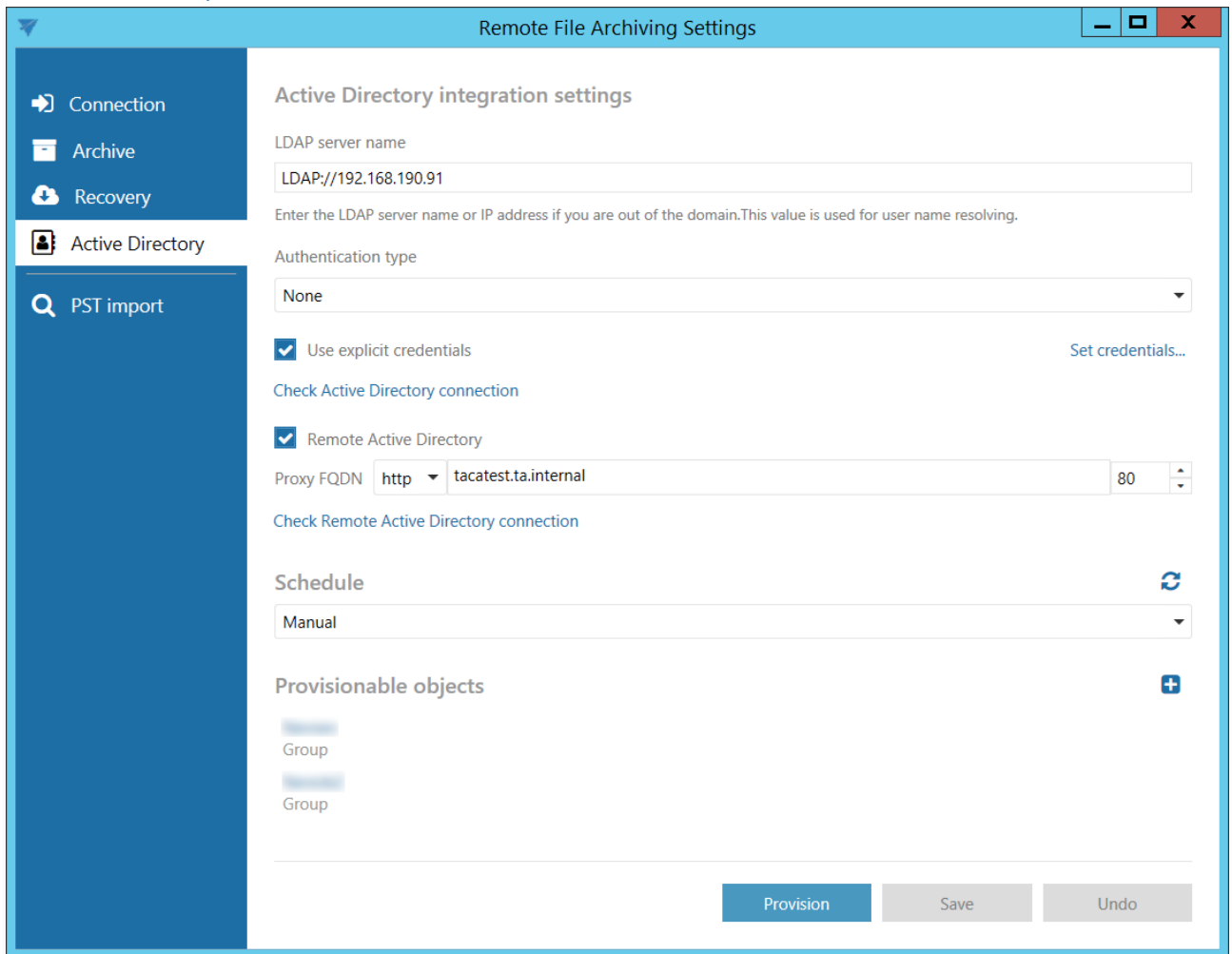
The selected item can be opened by double-clicking on it.



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

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

 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

Password

Confirm password

[Check credentials](#)

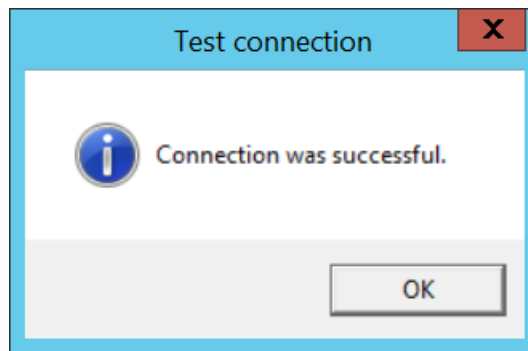
Click on **Check Active Directory connection** to see, if everything was set correctly.

LDAP server name

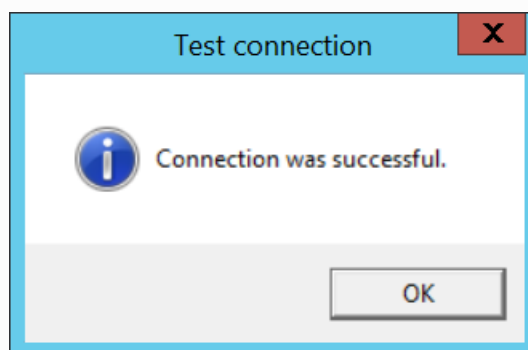
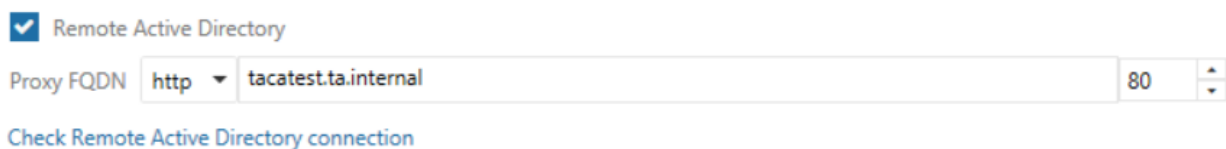
Enter the LDAP server name or IP address if you are out of the domain. This value is used for user name resolving.

Authentication type


 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.



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

TaskRunnerScheduler



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

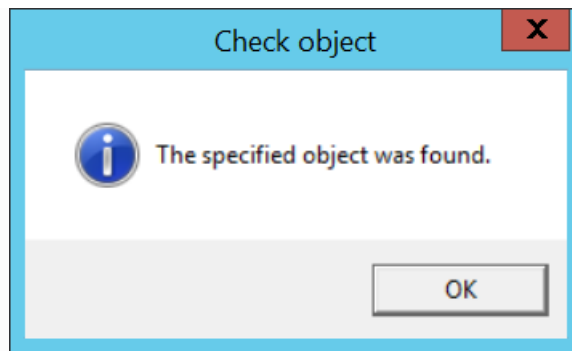
Example: Administrators or CN=Users,DC=domain,DC=com

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](#).

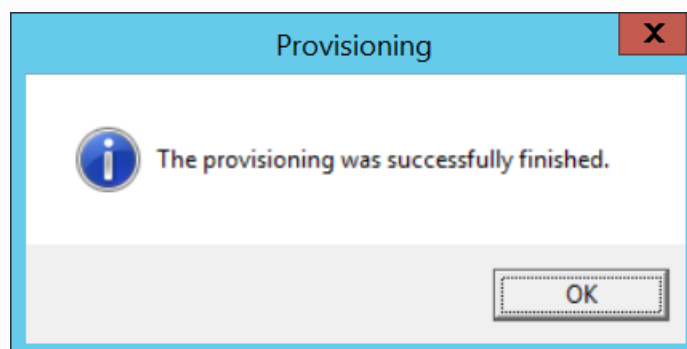
Provisionable objects

Administrators
Group



Provision

Save

Undo

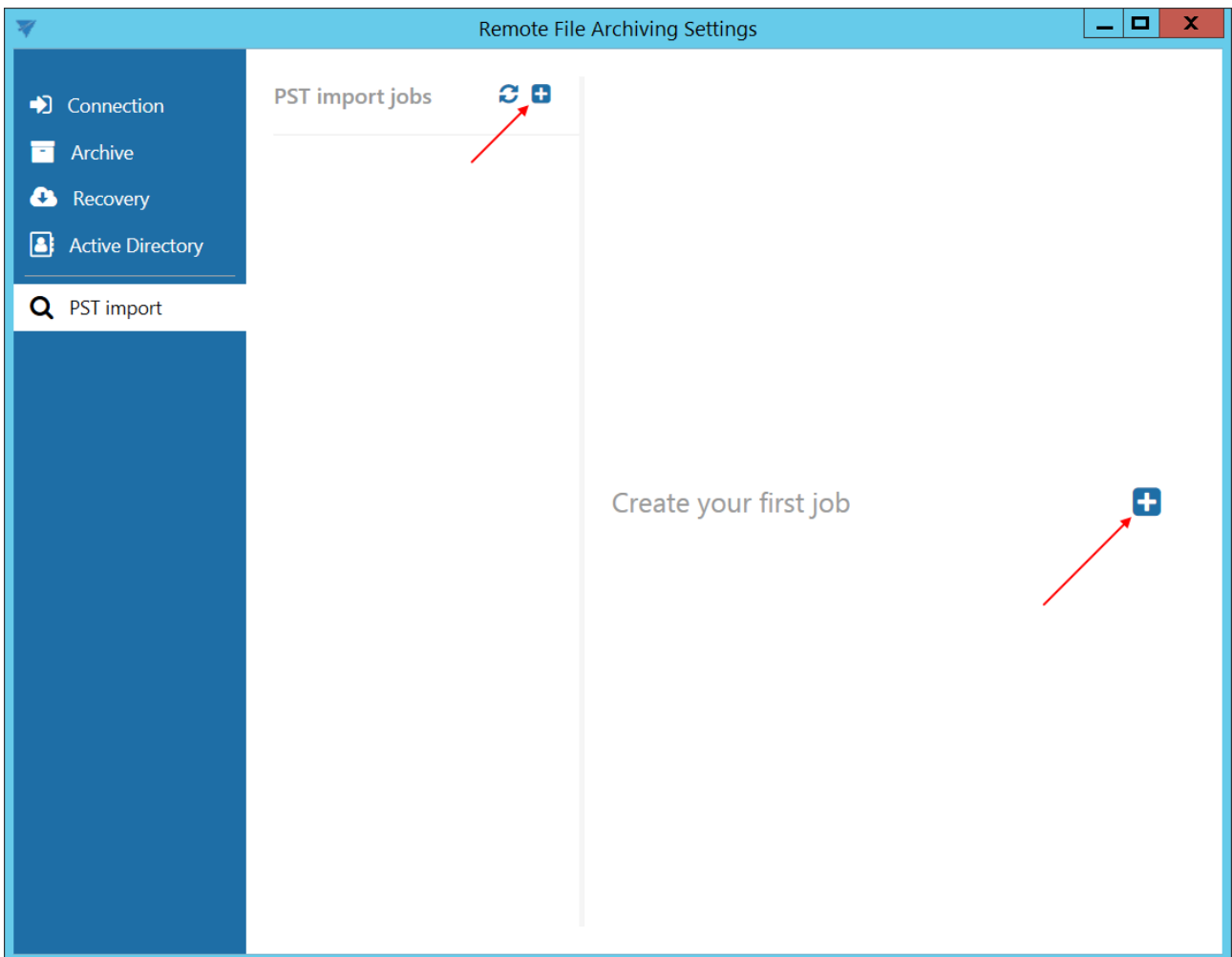
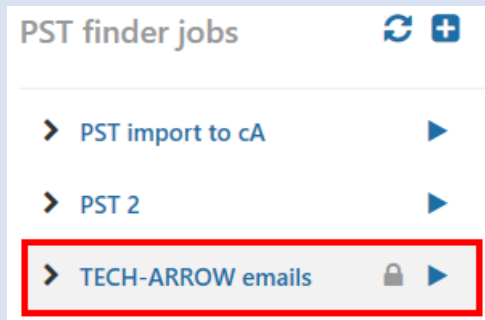


PST import tab

A new job can be added by clicking on the  button (the  button next to the **Create your first job** is available only when creating the first job). This job is used for uploading PST files to the contentACCESS server.

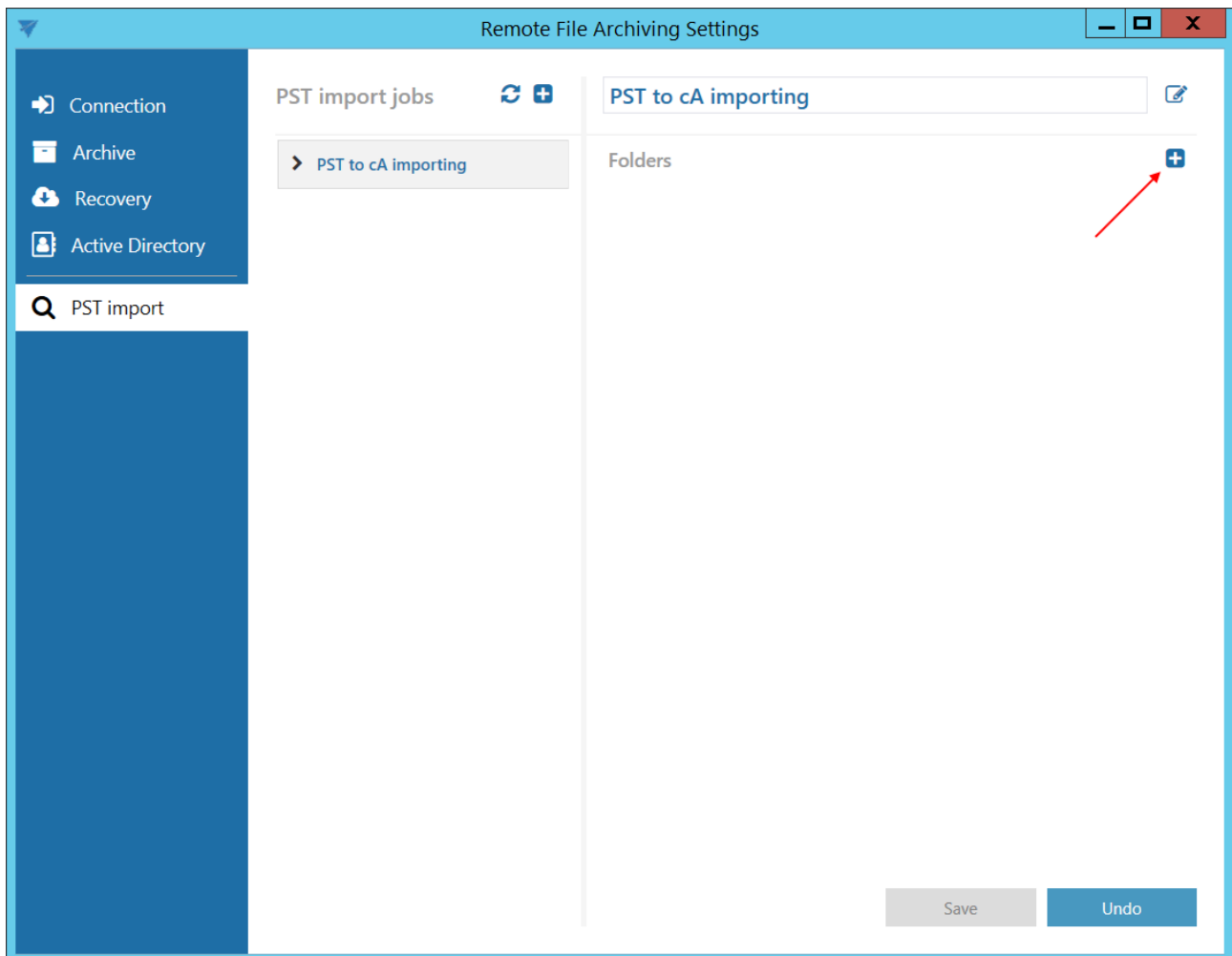



Note: A new job can be also added from **Central Administration**. To read more about this possibility, please check [this](#) section.



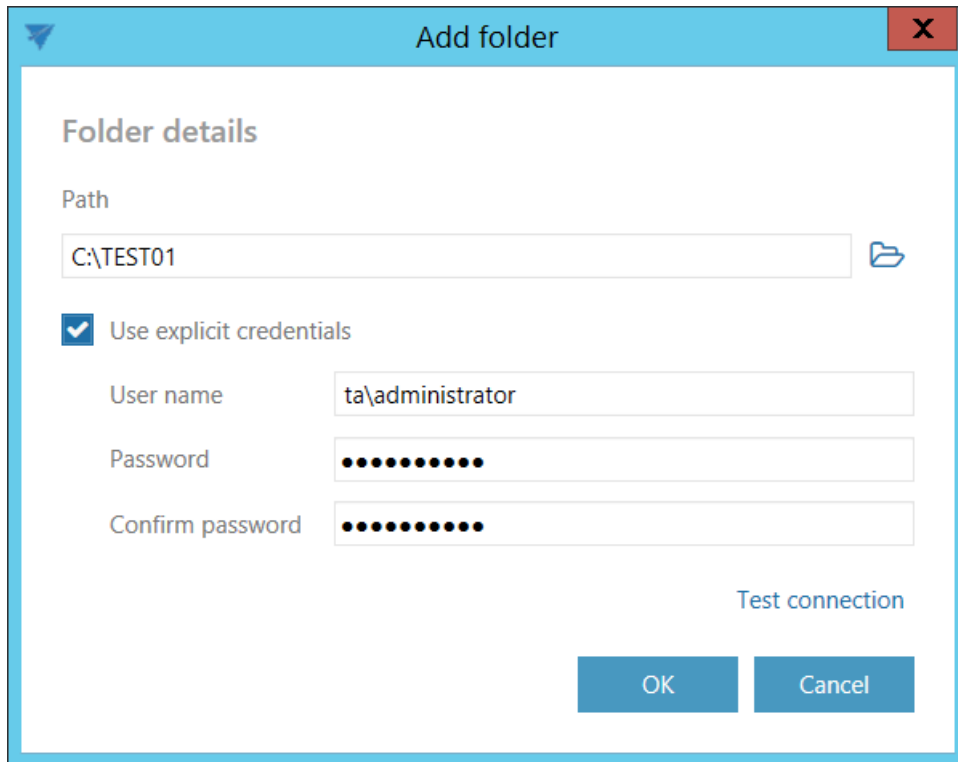
✓ **Folders**

In this section the user is required to select the folder(s) where the PST files to be uploaded are located. Click on **+** to specify the folder.

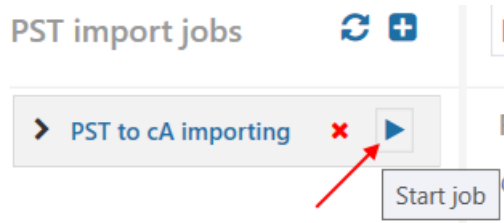


Enter the UNC path of the shared folder or path of a local folder to the **Path** textbox, or click on the  Browse button and select the folder containing the PST files that you want to process.

The **GATE.contentACCESS.RemoteFileArchiving.Agent** service is responsible for running the jobs. 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 with PST files that you want to process.



Save your settings. Start the job by clicking on the button next to its name.



It is possible to view the details of the last run of the selected job.



PST import jobs



▼ PST to cA importing ▶

Status:	Idle
Started on:	10/22/20...
Finished on:	10/22/20...
Added:	3
Updated:	0
Uploaded:	0
Skipped:	0
Failed:	0
Processed folders:	1

[View history...](#)

By clicking on [View history...](#), it is possible to view the last run of the job in more details. The pop-up window will show exactly which file was newly processed and which file couldn't be processed (was failed) on the respective tabs. The **general error** shows the error message if the job suddenly crashed (connection fail etc.).



Execution history
-
□
X

Execution history of "PST import to cA"

Started on	6/28/2018 3:26:28 PM
Finished on	6/28/2018 3:26:34 PM
Duration	0:00:05
Processed folders	2
Skipped files	0
General error	None

Processed files (3)

Path	Date processed	Size
C:\PST import\ABAL.pst	6/28/2018 3:26:29 PM	0 B
C:\PST import\██████_Inbox.pst	6/28/2018 3:26:32 PM	0 B
C:\PST import\Lsl.pst	6/28/2018 3:26:34 PM	0 B

Failed files (0)

Path	Date processed	Size
------	----------------	------

Close

PST files processed here can be later used in contentACCESS PST import.