techarrow

contentACCESS

BEST PRACTICES
FILE ARCHIVE

Use case: 15 steps for File archive configuration

This guide gives an overall overview about the required settings of a File Archive job.

⚠ Please remember that the names, configurations, and units that we chose in this use case have an informative character only.

A company is using contentACCESS File Archive with 2 criteria: a) the Keep original method (backup files with versioning) is often used daily, while b) files older than 1 year are archived with the shortcutting method. The main advantage of the b) method is the spared space on the computer. It is much easier to restore/reopen files stored with method a). It depends on a particular situation which method is advisable to use. You can use both methods simultaneously to have your daily backup (with versions when files are changed) and archive your old files using shortcuts.

USE CASE:

Goal:	**TECH-ARROW's file archive**
Folders to be archived:	Share *\\tanews\EBA\FA_TestFiles* on the *\\tanews\EBA* root
Archiving method:	using shortcuts
contentACCESS single server:	tanews
Storage:	single disk store
Database:	single database
Retention time:	10 years
Scheduler:	provisioning job running daily from 1 AM; file archive process running every day from 6 PM
Monitoring:	troubleshooting of potential system and job related misconfiguration.

1. **Install contentACCESS** on a server and open the *central administration* interface of the software using this sample URL:
http://[SERVER_NAME]:3333/CentralAdministration/Login.aspx.

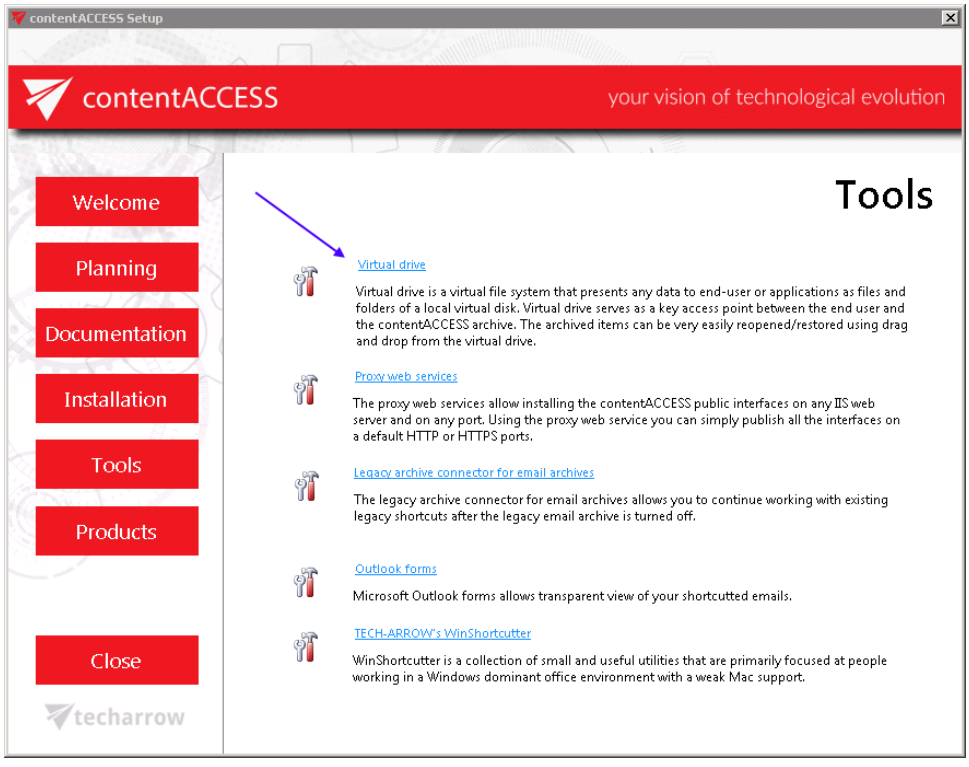
Log in with the system user credentials. (For more details, refer to the contentACCESS Manual).

2. **Install virtual drive.**

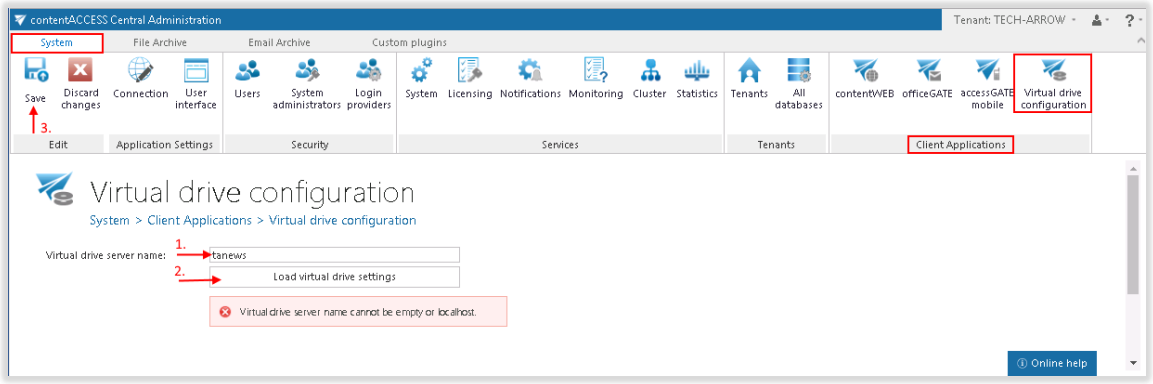
If you are archiving with the "Keep original" method: It is not a must to have virtual drive if you are archiving your files by keeping them in the original file location. However, it can be used to browse for the archived data or to share the archived files with other users (e.g., if you do not use contentWEB).

If you are archiving using shortcuts: When a file is archived using shortcuts, it is replaced with the respective shortcut that links to the virtual drive. This helps to save storage space. The user can easily retrieve the archived items using these shortcuts if the virtual drive is installed. If the drive is not installed, the shortcut retrieve does not work. As we will use shortcuts in this use case, we need to have it installed.

The rule is to install virtual drive **a) if the files are archived using shortcuts** and they need to be retrieved using these shortcuts, and/or **b) if the drive is used as a substitute of contentWEB** archive interface. Virtual drive is accessible in the Tools of the contentACCESS setup package. For more information on how to install virtual drive, read the contentACCESS Virtual Drive Installation Manual.



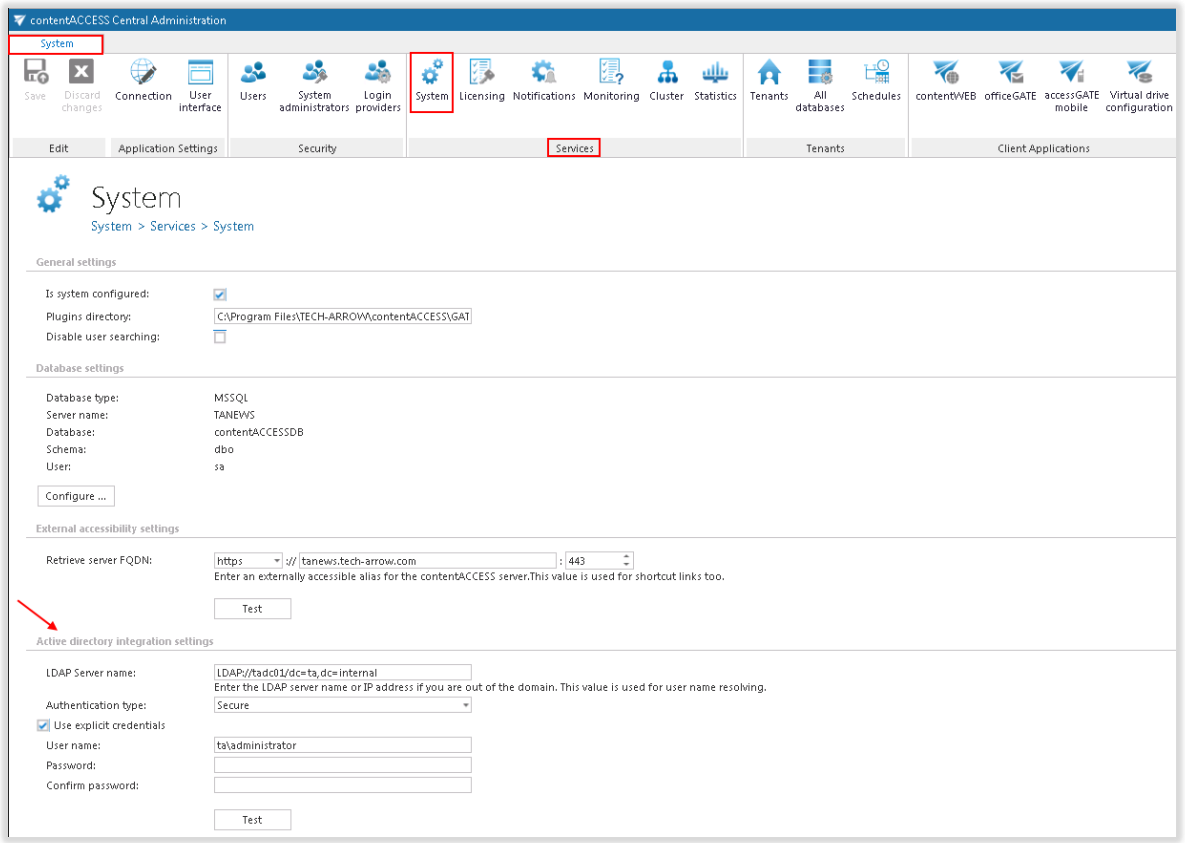
3. **Configure Virtual drive.** Open the **Virtual drive configuration** page (***System*** tab → ***Client Applications*** group→ ***Virtual drive configuration*** button) in the Central Administration ribbon, and 1) specify the Virtual drive server name, 2) load the virtual drive settings, and 3) save your changes.



4. **Configure the Active directory integration settings**. Open the **System** page (by navigating to ***System*** tab → ***Services*** group → ***System*** button on the ribbon) and enter the Lightweight Directory Access Protocol (LDAP) server name in the corresponding section, like the picture below.

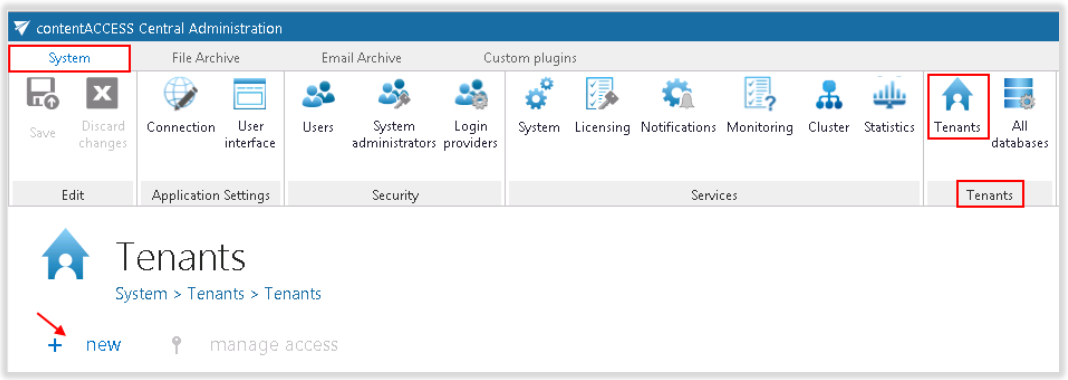
Enter the user and user credentials, run a test connection, and save your settings.

Note: The values will be used for user name resolving.

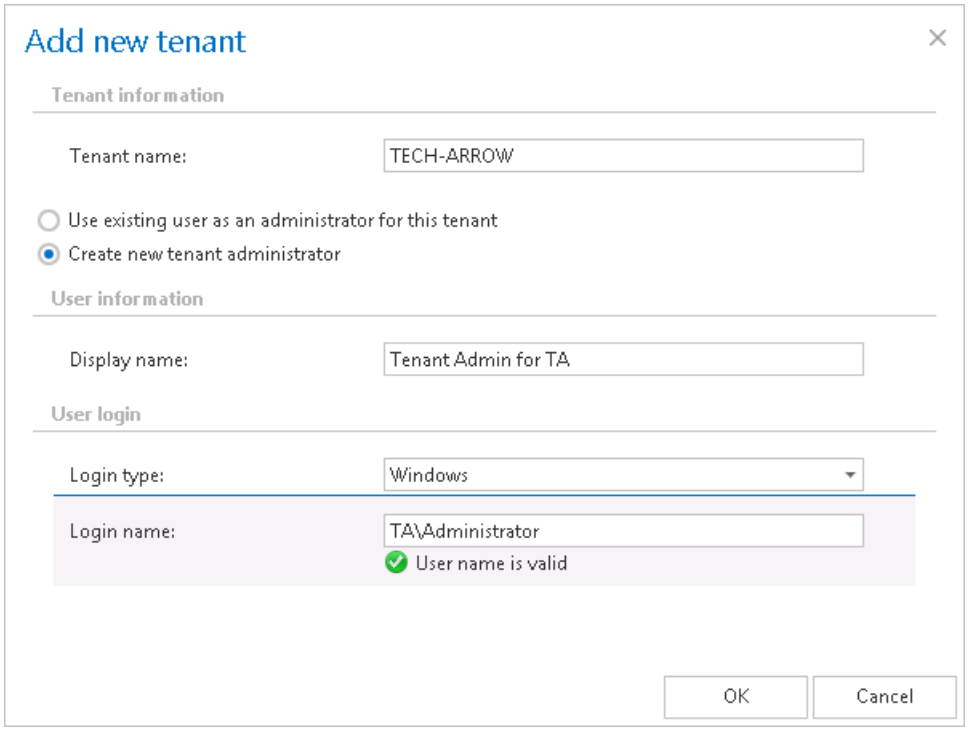


5. **Add a Tenant.** Open the **Tenants** page (***System →Tenants →Tenants)*** and click **+ new** (Screenshot A). Create a new tenant **(*TECH-ARROW*)** and tenant administrator (***Tenant Admin for TA***) like on Screenshot B.

Note: If you have a single tenant-license, you can skip this step, as the **Default** tenant will be automatically created.

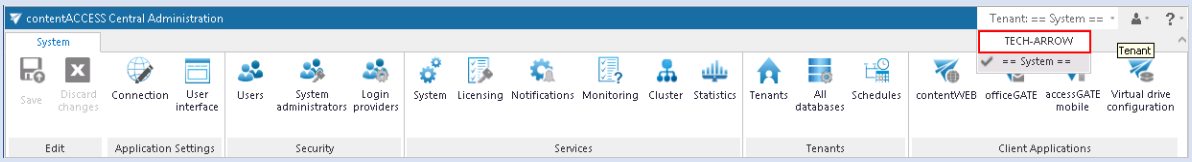


Screenshot A



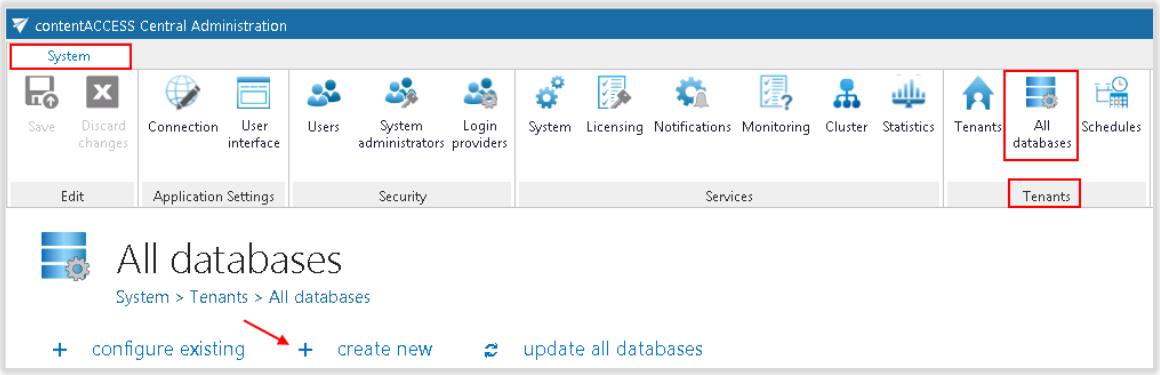
Screenshot B

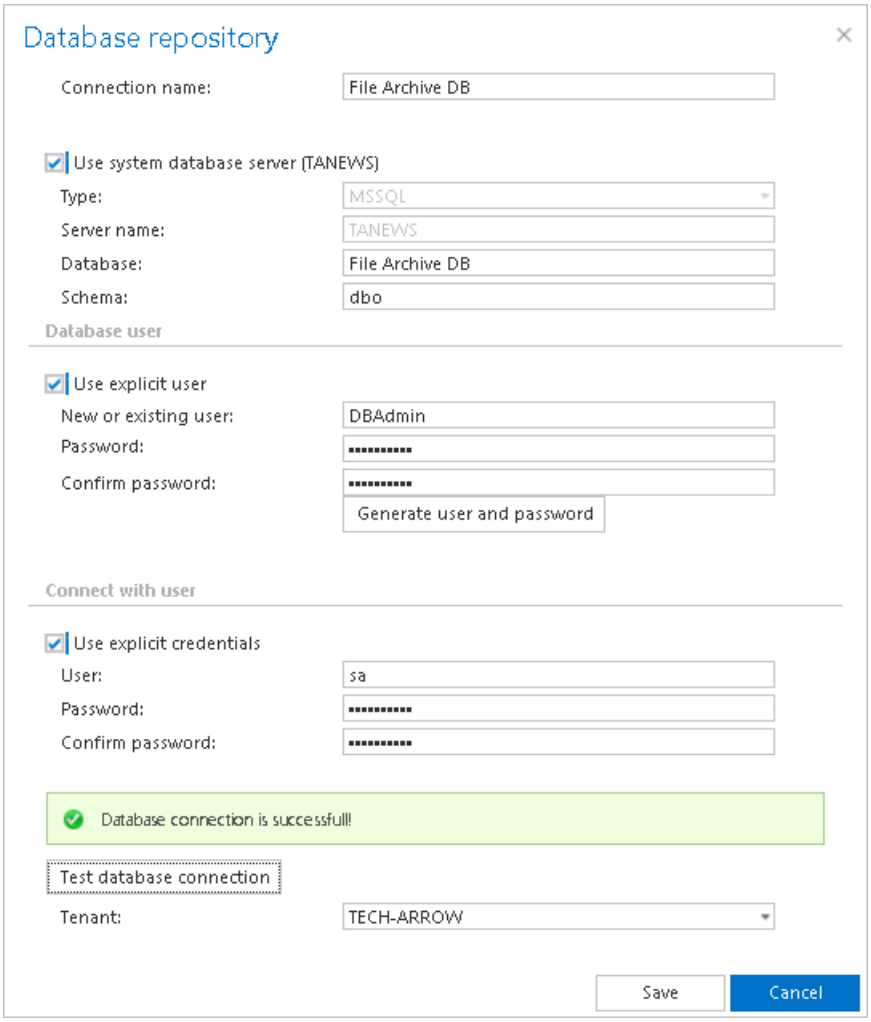
The newly created tenant appears in the upper right menu of central administration, like the screenshot below.



6. **Create the needed database(s) for your tenant**. Open page **All databases** (***System*** → ***Tenants*** → ***All databases)***, click **+ create new** and create a single SQL database to TECH-ARROW tenant with connection name "File Archive DB" and Database user "DBAdmin".

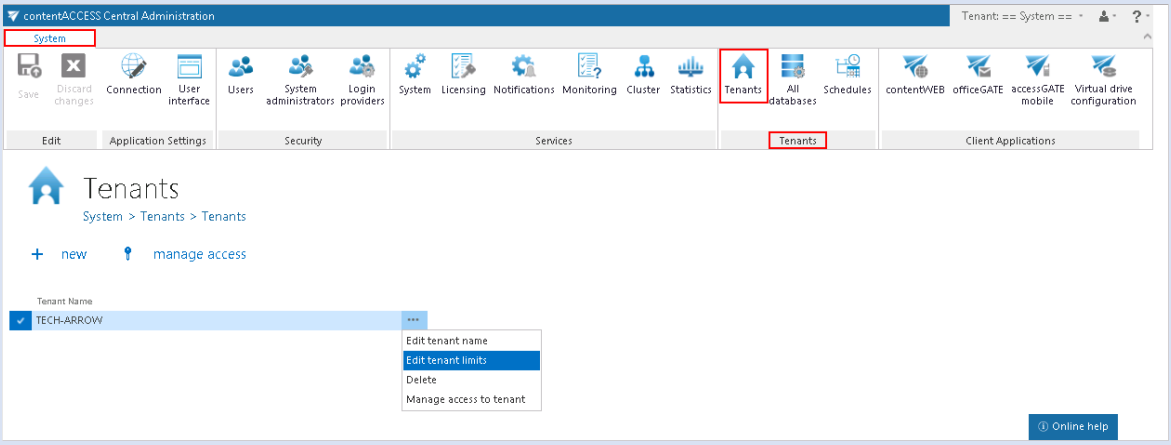
When creating databases, consider the size of the company and the number of files archived. For bigger companies, with a high number of files, it is recommended to create separate databases to ensure the transparency of processes. The database created first will be automatically set to default database for the respective tenant. This option is configurable on the page of **Databases** using the context menu.



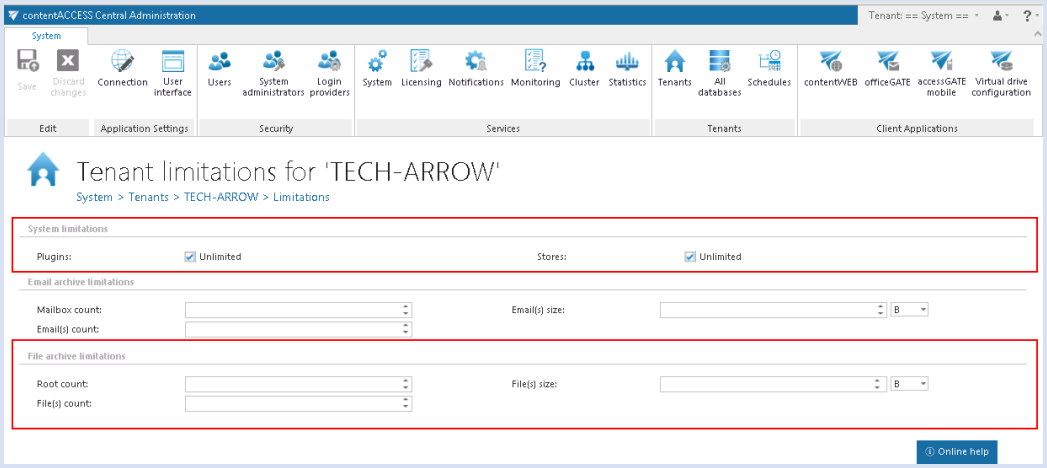


Configuration details:
Connection name: the display name of the database in contentACCESS
Option "Use system database server": if the database must be created on the system database server (like in this use case), select this option; otherwise, specify the required database values (**Server name**, **Database**, **Schema**) manually.
In section **Database user,** you need to specify a user for the newly created database:
Enter the credentials of the existing MSSQL user or create a new user and password by clicking on the **Generate user and password** button. contentACCESS will give access rights to the database on MSSQL for this user. This newly created user will have access permissions only to the created database. If you specify no explicit user in this section, then the service user will be used to access the database.
In section **Connect with user,** you must specify the MSSQL admin credentials**:**
Use explicit credentials: if this checkbox is not checked, then contentACCESS will automatically connect to the database (MSSQL) under the contentACCESS service account. If you wish to connect with an explicit user, then specify an admin user with the rights to create a new database on the database server.
Tenants: select the database owner tenant from the dropdown list (in our case **TECH-ARROW**)

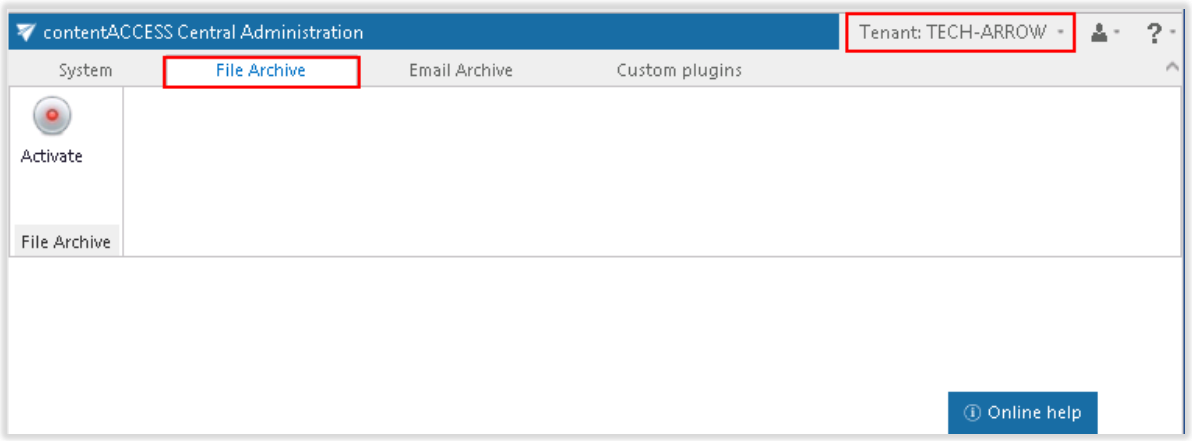
Note: Limitations to the newly created tenant can be set on the **Tenants** page. using the given tenant's context menu. Select "Edit tenant limits" in the context menu.



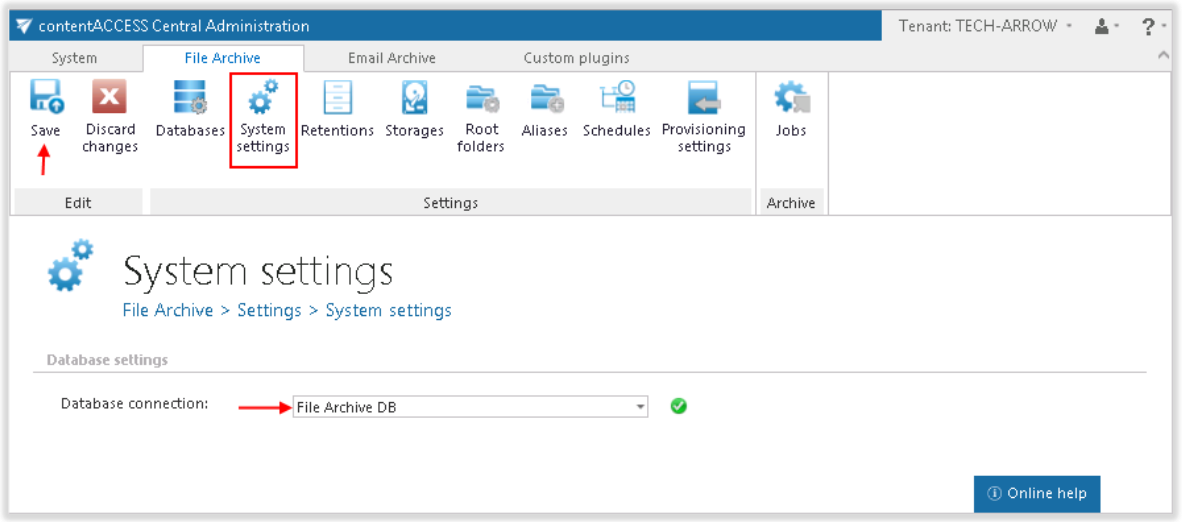
On the next page. you may set the plugins and stores, the maximum root count, file size. and file count that the TECH-ARROW tenant may archive. By default, these values are set to unlimited:



7. **Activate File Archive. Select TECH-ARROW tenant** in the upper right menu of the central administration user interface, and **open the File Archive** tab on the ribbon. **Activate File Archive** by clicking on the "Activate" button.

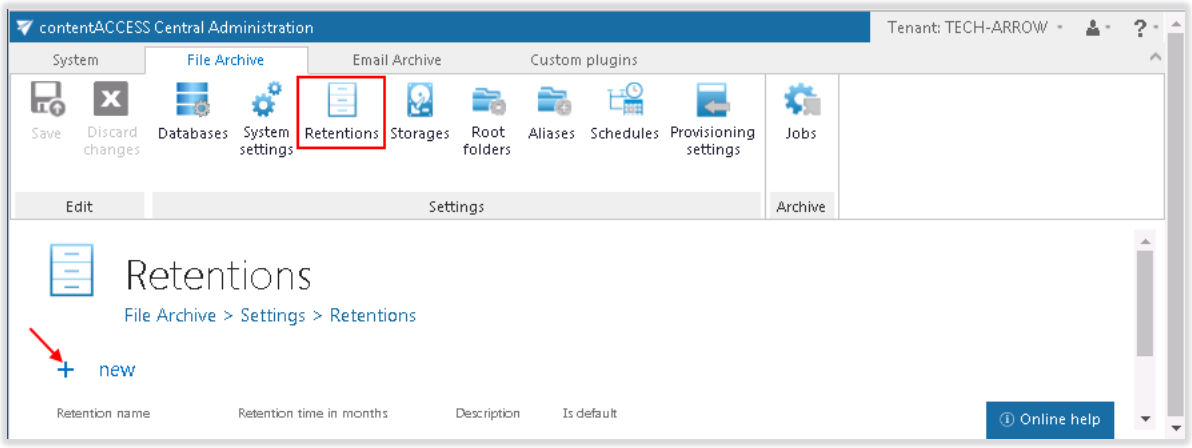


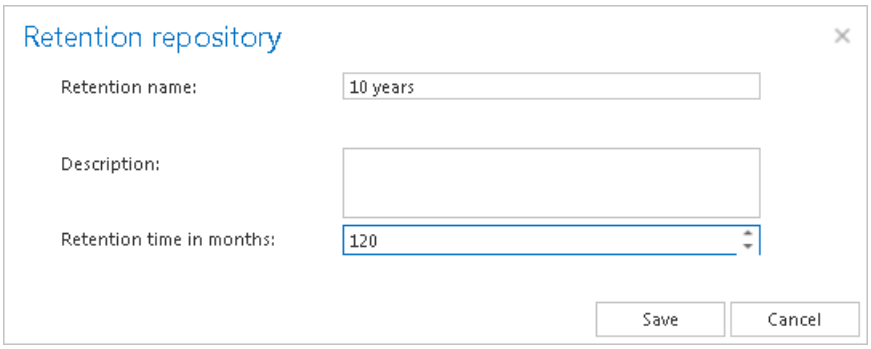
8. **Set the system database.** Open the **System setting** page (***File Archive*** tab → ***Settings*** group→ ***System settings*** button) and select the above created "File Archive DB" from the dropdown list. Deploy it and save your changes.



Note: All the archived root folders (and its settings) are kept in this database.

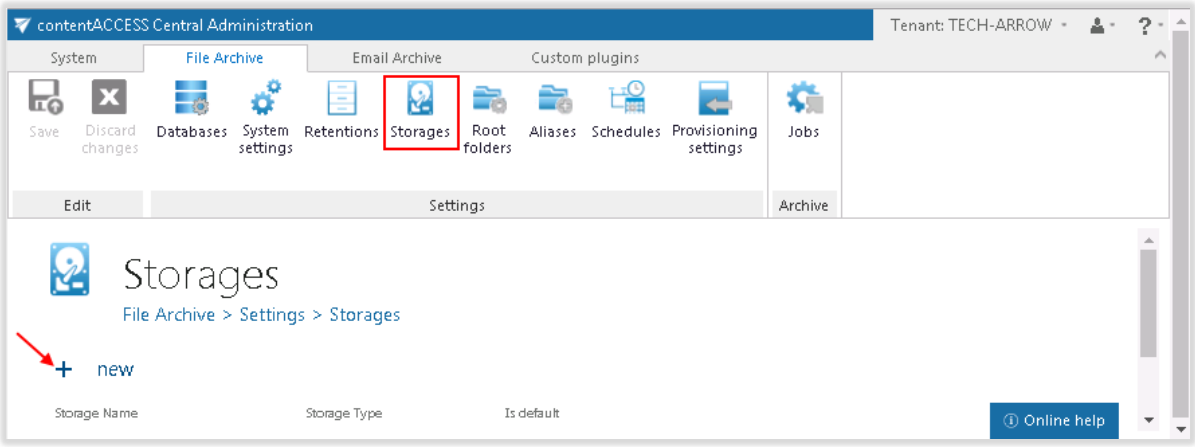
9. **Set retention(s).** Open the **Retentions** page (***File Archive*** tab → ***Settings*** group → ***Retentions*** button) and create retention(s) to be used. In this use case, we will create one retention "10 years". Click **+ new** and enter the required values into the repository window, like the pictures below. Once the retention is created, save your changes.

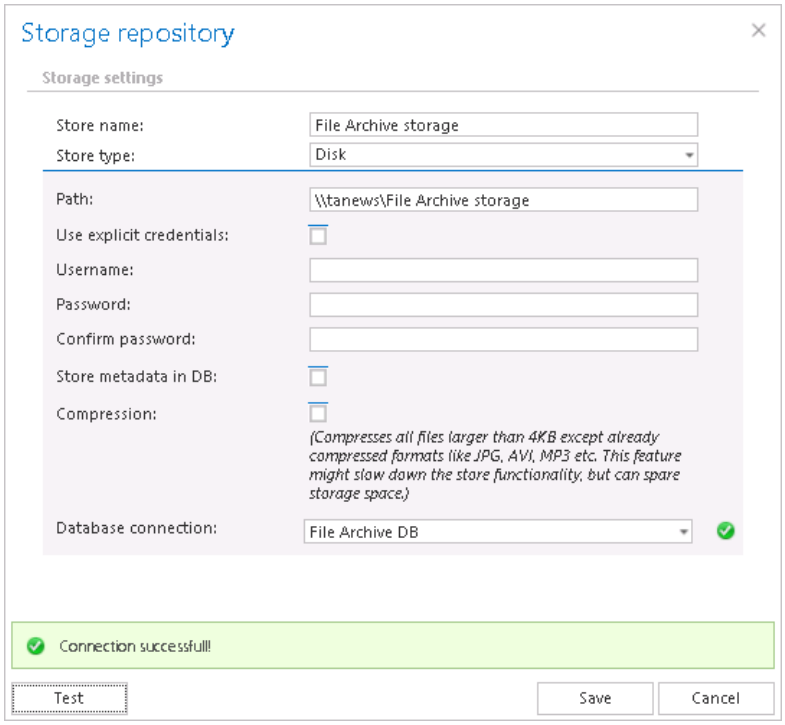




Note: Retentions define the time of storing the binaries in the selected storage. When setting retentions in contentACCESS, consider the data retention requirements of your country. The retentions set on this page can be selected on the archive job's configuration page later.

10. **Create a single disk store.** Open the **Storages** page (***File Archive*** tab → ***Settings*** group → ***Storages*** button) and create your "File Archive storage". Click **+ new,** select "Disk" store type, and enter the correct file path into the repository window, like the second picture below. Select the above created "File Archive DB", where this storage will write the metadata and save your settings.

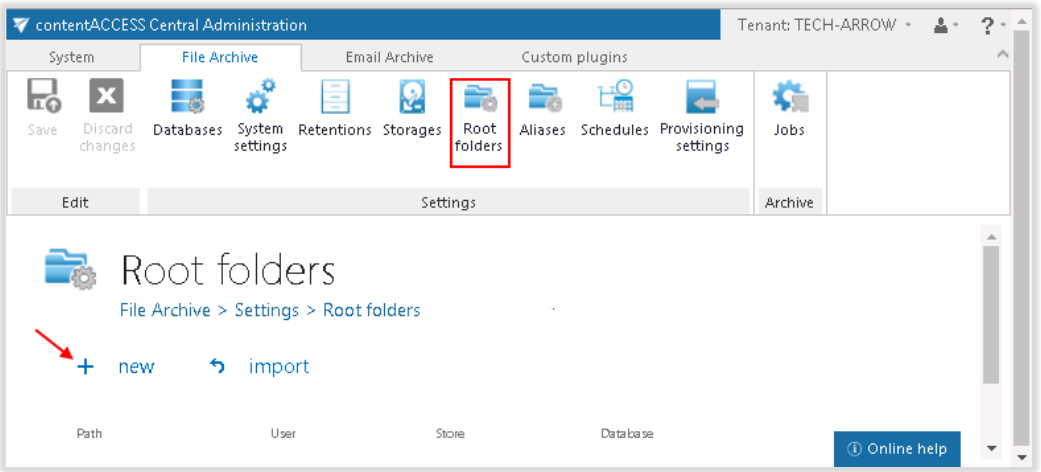


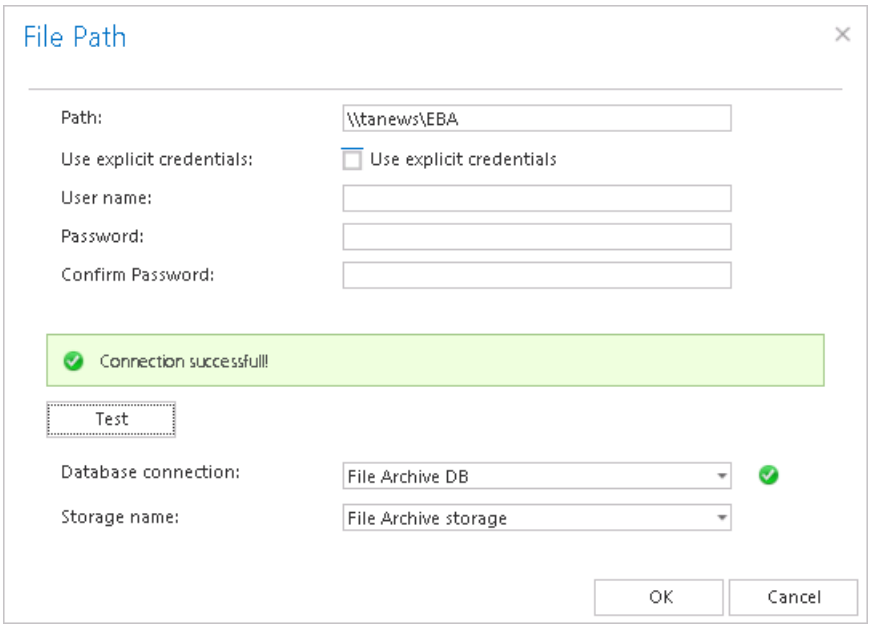


Note: Available storage types are listed in the Store type dropdown list. If you want to use another storage, refer to this chapter of the online guide.

Disk store allows to store further metadata in the database (option "Store metadata in DB"). By unchecking this field, it is possible to spare even more database space, if these metadata are redundant for the user. If an explicit user is not selected for this storage, then the contentACCESS service user is automatically used. The storage created first is set to default automatically.

11. **Specify root folder(s).** The root folder(s) to be archived are configured on the **Root folders** page (***File Archive*** tab → ***Settings*** group → ***Root folders*** button). Click **+ new** to add a root folder and specify the required fields in the next window.
    You will have to assign a database and a storage to the root. Assign "File Archive DB" and "File Archive storage" created a few steps earlier.

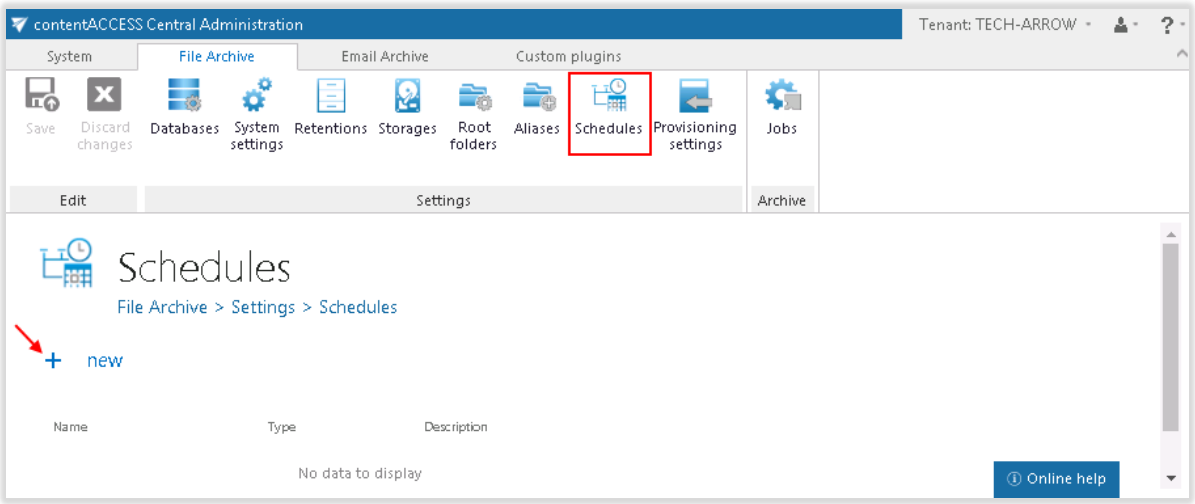




Note: The root folders define the start point of the archive process. The archive job that processes a root writes the data into the database and storage assigned to it. It is not recommended to change these settings later, as this may result problems in the file retrieve. The relative file path can be set on the archive job's configuration page later.

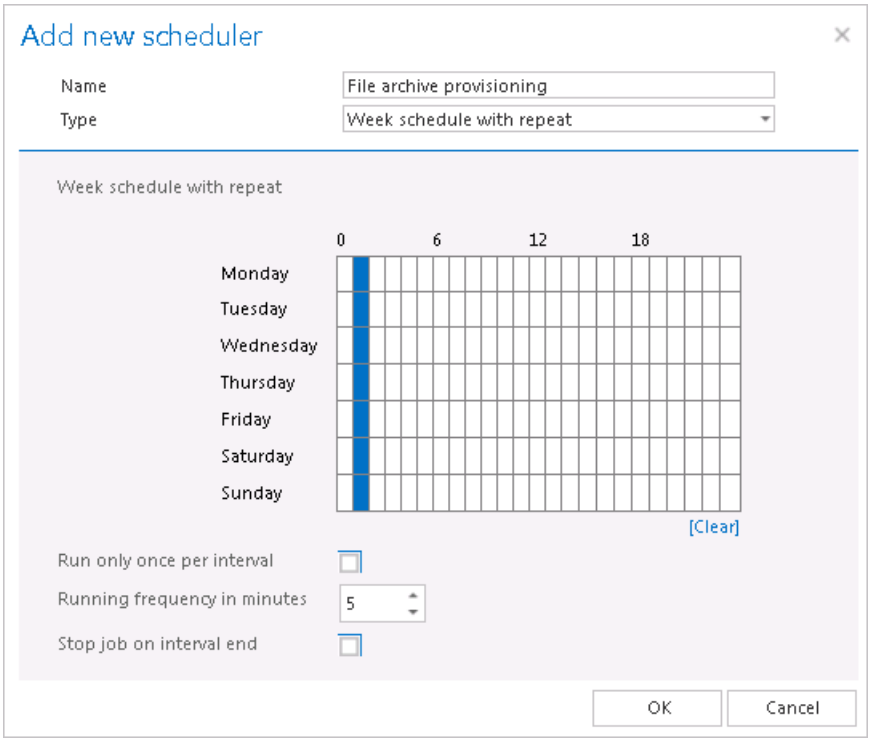
The import option on the same page allows to import the list of root folders from a file. For more information about this feature, read this section of the online guide.

12. **Configure 2 schedulers: one scheduler running every hour for the archive job; another scheduler running daily for the provisioning job.** Open the **Schedules** page (***File archive*** tab → ***Settings*** group → ***Schedulers*** button) and create them.



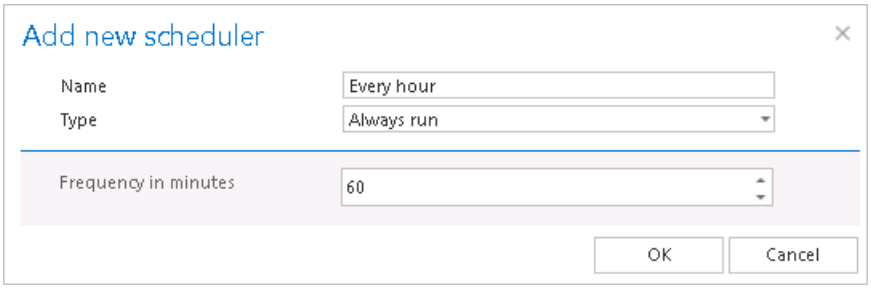
1st: "File archive provisioning" scheduler properties:

Click option **+new** on the **Schedules** page. In the next pop-up dialog, name your scheduler – "File archive provisioning". Select type "Week schedule with repeat" and fix the running times in the calendar, e.g., to 1 AM like in this use case.



2nd: "Every hour" scheduler for the File Archive job:

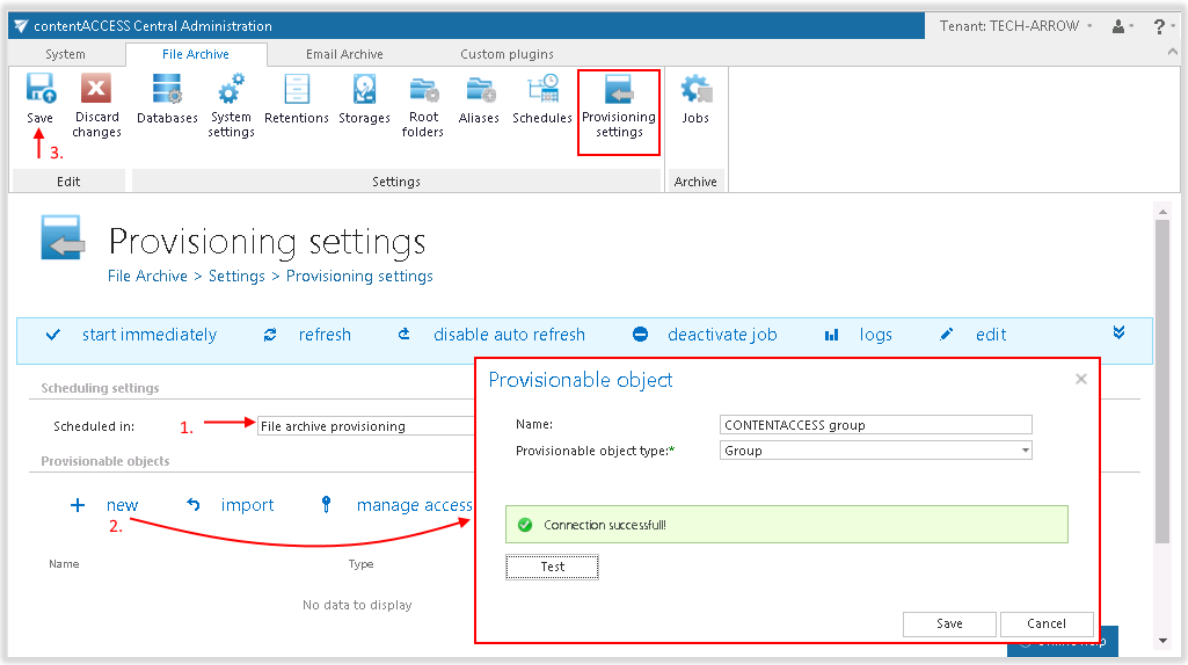
Click **+new** on the **Schedules** page. In the next pop-up dialog, name your scheduler – "Every hour" in this use case. Select "Always run" and set the frequency to 60 minutes.



Save your changes.

13. **Configure and run the File archive provisioning job.** Open the **Provisioning settings** page (***File Archive*** tab → ***Settings*** group→ ***Provisioning settings*** button) and set the "File archive provisioning" scheduler created in step 11 above, and configure the Active Directory objects (in this use case CONTENTACCESS group) to be provisioned. Save your settings.

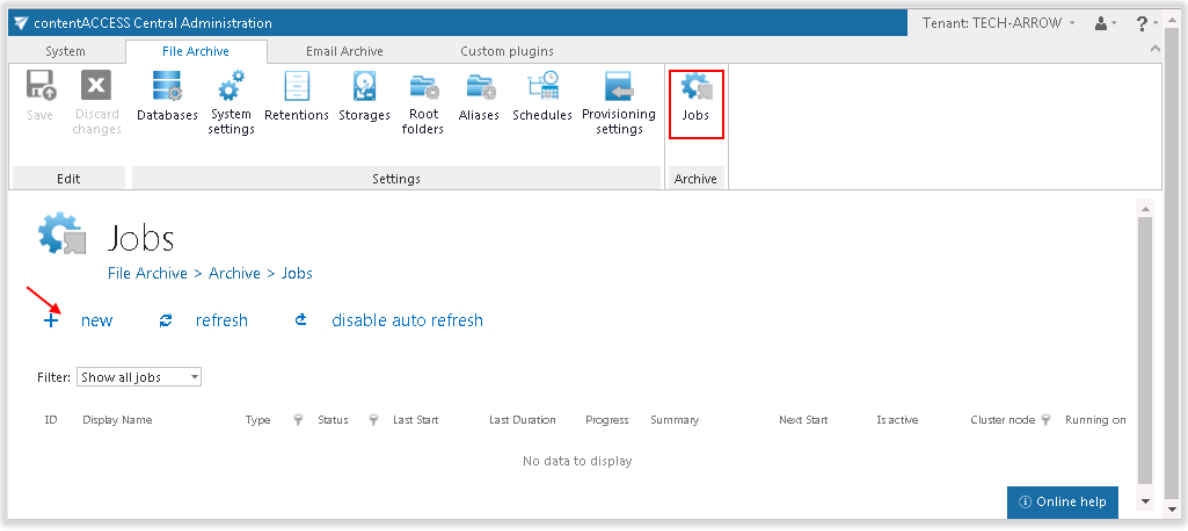
If you do not want to wait until the scheduler starts the provisioning, start it manually by clicking on "Start immediately" in the blue status bar.



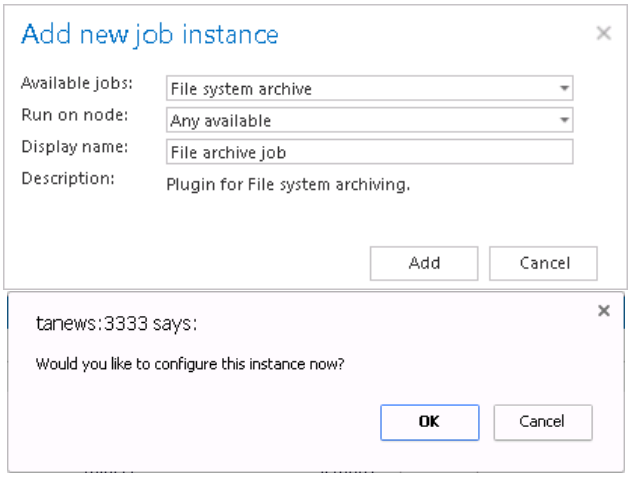
Note: The provisioning job synchronizes the Active Directory with contentACCESS. The provisioned object (this may be a group or LDAP path in the Active Directory) will automatically get log on rights to the contentWEB File Archive and can view its associated archive folders. Provisionable objects can be also imported from files using the "import" option on the same page. contentWEB access right for a single user can be granted using the "manage access" option. For more information, refer to the online guide here.

Now, you can create a File archive job.

14. **Create a File archive job on the Jobs page**. Open the **Jobs** page (***File Archive*** tab→ ***Archive*** group→ ***Jobs*** button) and click on **+ new**.

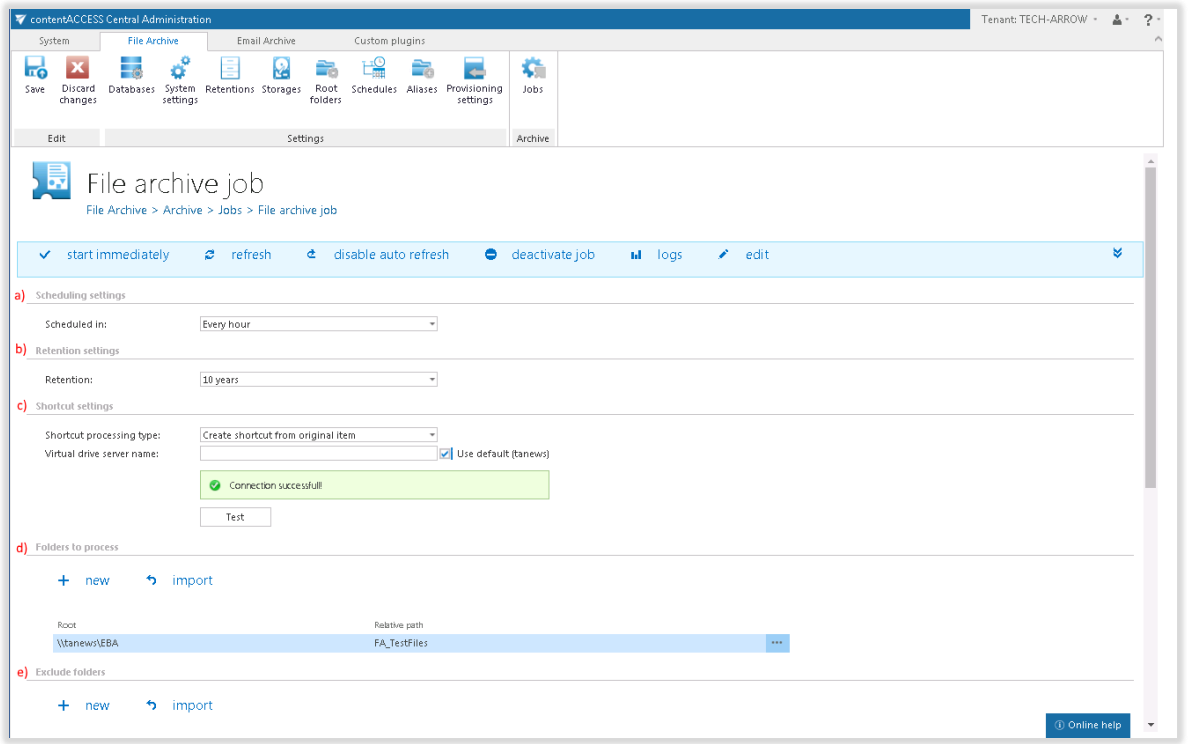


Name your job in the next dialog and click on “Add”. The application will prompt you to configure this newly created job immediately. Answer OK.



15. **Configure your archive job on its configuration page.**

By clicking “OK” one step earlier, the job configuration page opens. Configure the storage, database, folder(s) to archive etc., based on your File Archive settings (***File Archive*** tab → ***Settings*** group), set the filters and select the archive method that should be applied. Our File archive job will archive documents older than 1 year on our share \\tanews\EBA\FA_TestFiles. Archived documents will be replaced with shortcuts to save space.



Configuration details:

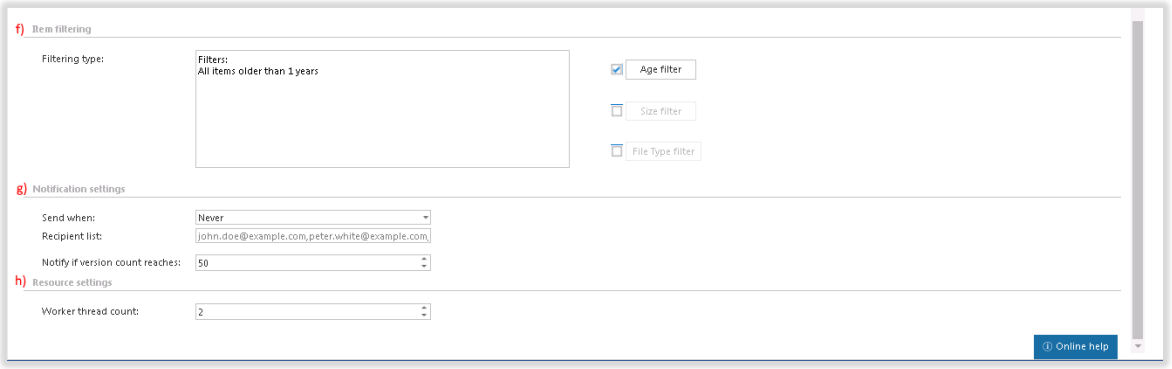
a) **Scheduling settings**: Set the configured "Every hour" scheduler that will start your job every hour, as defined.

b) **Retention settings**: Set the configured "10 years" retention.

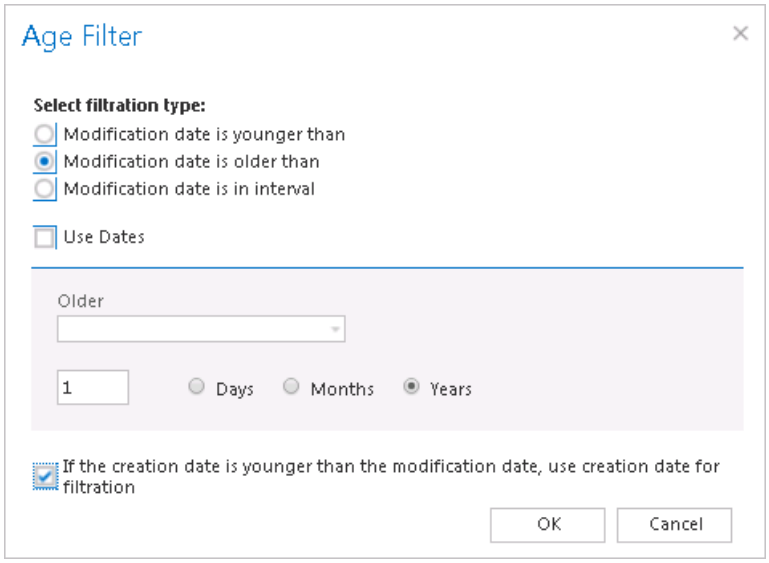
c) **Shortcut settings**: Open the dropdown list and select option "Create shortcut from original item" and specify the virtual drive server name. Virtual drive is used to retrieve the original item(s) from the shortcut(s). Test the connection with the virtual drive server.

d) **Folders to process**: Specify the folder(s) to process manually or import the list from a file. Now, we will specify it manually, so we click **+new**. Select the configured root folder from the first dropdown list and enter the relative folder path if the archive job should start from a lower level. In this use case, the \\tanews\EBA\FA_TestFiles share will be archived. Test the connection and click "OK".

e) **Exclude folder:** If there are any folders that shouldn't be archived, exclude them from the process using this option. As we do not have such excludable folders in this use case, we skip these settings.



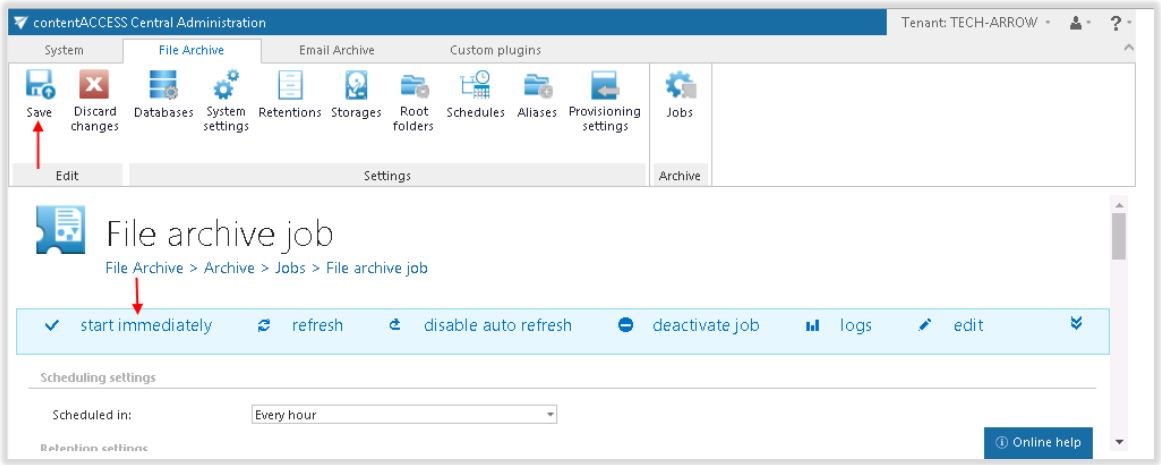
f) **Item filtering:** Use this option to set any age, size, file type filters that must be used. In this use case, we will archive everything older than 1 year. Click on the "Age filter" button and set the required time period in the next dialog:



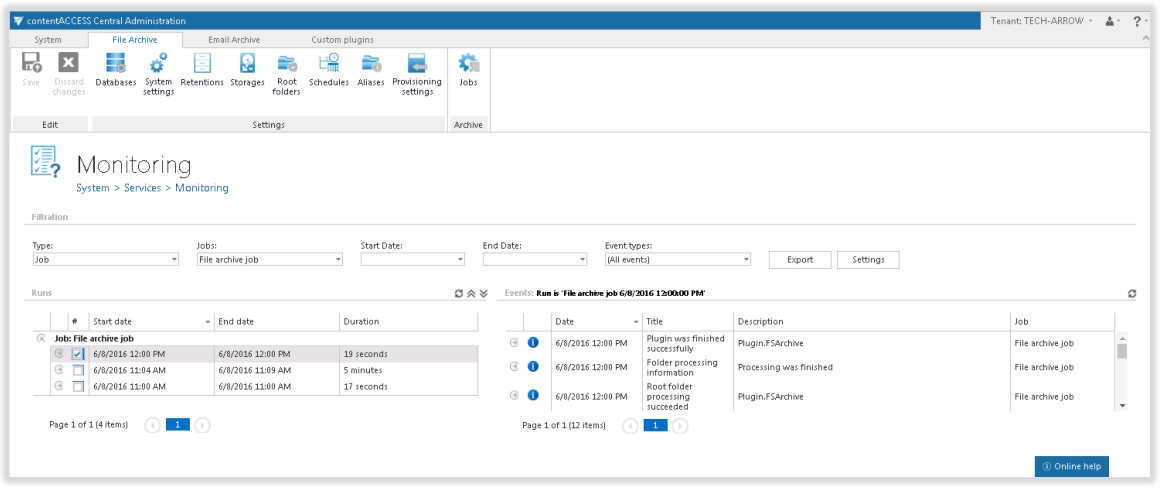
g) **Notification settings:** If you want to get notification emails about any errors or warning that might occur due to any misconfigurations, you can set it here. Now, we skip these settings.

h) **Resource settings:** already set to the recommended value

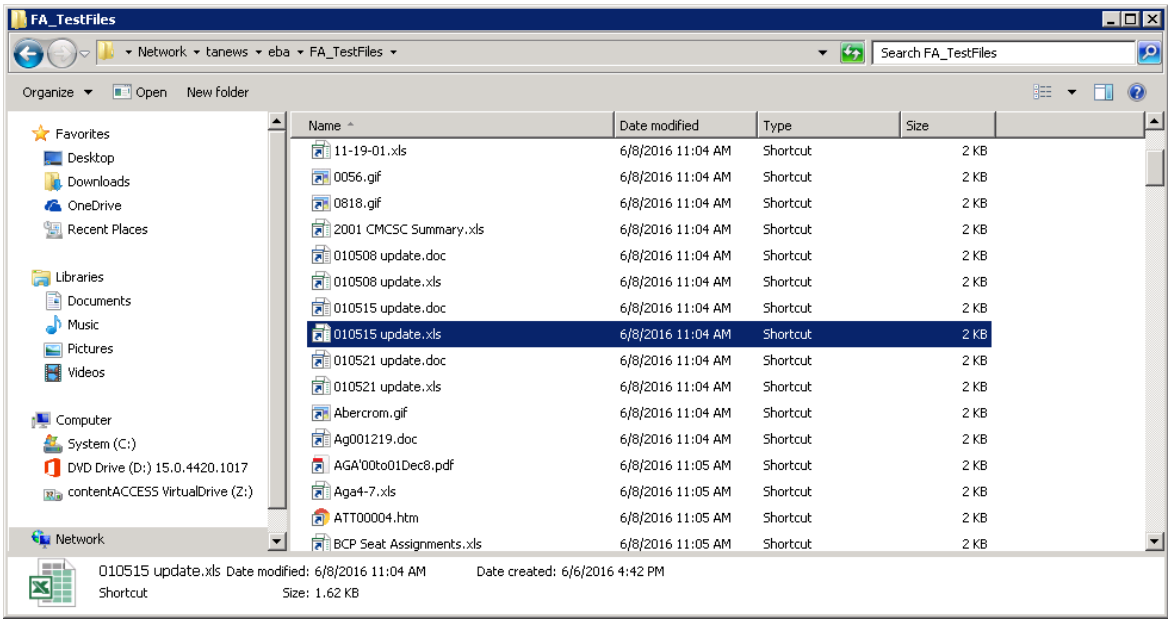
For more information about these settings, refer to the online guide here. Now, the job configuration is ready. Save your settings in the top left corner of the user interface. Wait until the scheduler starts the job in the next hour or start it manually by clicking on "start immediately" in the blue status bar:



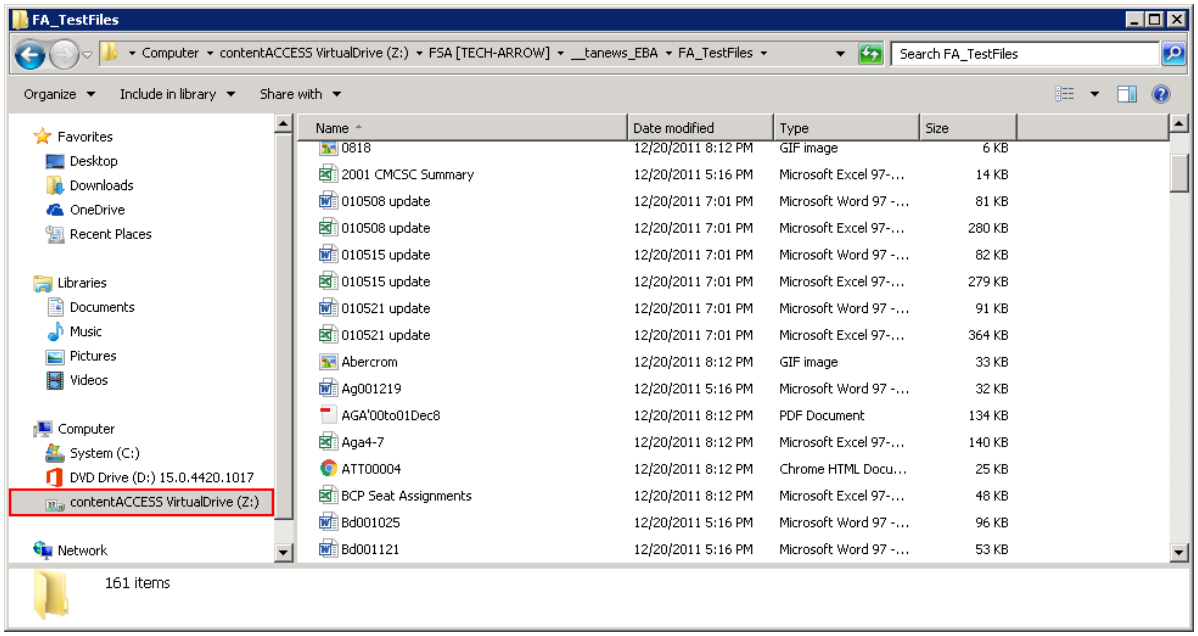
Now, we will check the "File archive job" events to see if everything has run properly. Open the **Monitoring** page (***System → Services → Monitoring)*** using the "logs" option in the job's header bar. Under "Events", you can see the job has finished the task successfully. Use the **Export** function to export the events into an HTML, XML or CSV file format:



Access your archived files using the shortcuts (screenshot A) or search in the archive using the virtual drive (screenshot B). Enjoy it☺



Screenshot A



Screenshot B