



FILE ARCHIVE BEST PRACTICES

in

contentACCESS version 6.3



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Use case: Steps for File archive configuration

This document gives you an overview about how to configure a **File archive** job, including the **Indexing** job for the files.

Important: Please keep in mind that the names, configurations, and units that we chose in this use case have only an informative character.

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 recommended 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.

Goal:	TECH-ARROW's file archive
Folders to be archived:	Share <u>\\TACATEST\Microsoft materials</u>
Archiving method:	using shortcuts
contentACCESS single server:	tacatest
CPU:	2.4 GHz quadcore
Memory:	24 GB
Storage:	single disk store
Database:	single database
Retention time:	10 years
Scheduler:	provisioning job running daily from 1 AM; file archive process running every hour
Monitoring:	troubleshooting of potential system and job related misconfiguration.



Installation of the product

Install **contentACCESS** on a server and open the [Central administration](#) interface of the software. Log in with the system user credentials. (For more details, refer to the [contentACCESS Manual](#)).

Installation of virtual drive

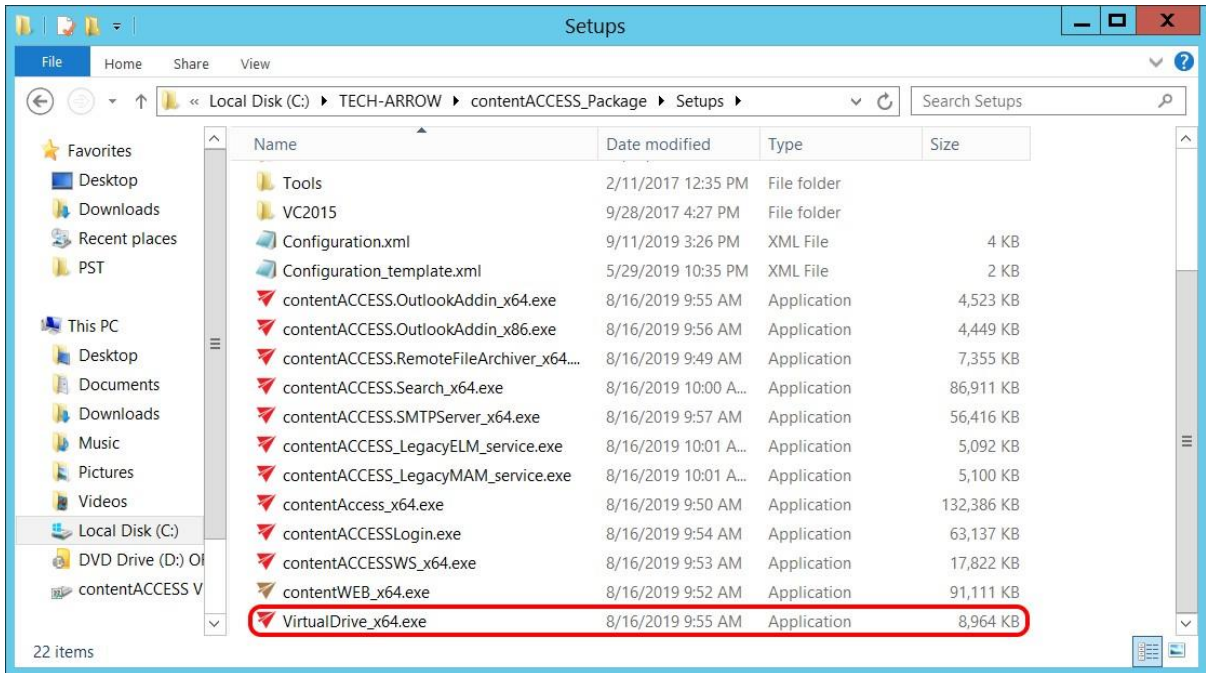
If you are archiving with the “Keep original” method: It is not a must to have virtual drive if you are archiving your files by keeping them in the original file location. However, it can be used to browse the archived data or to share the archived files with other users (e.g., if you do not use [contentACCESS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

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

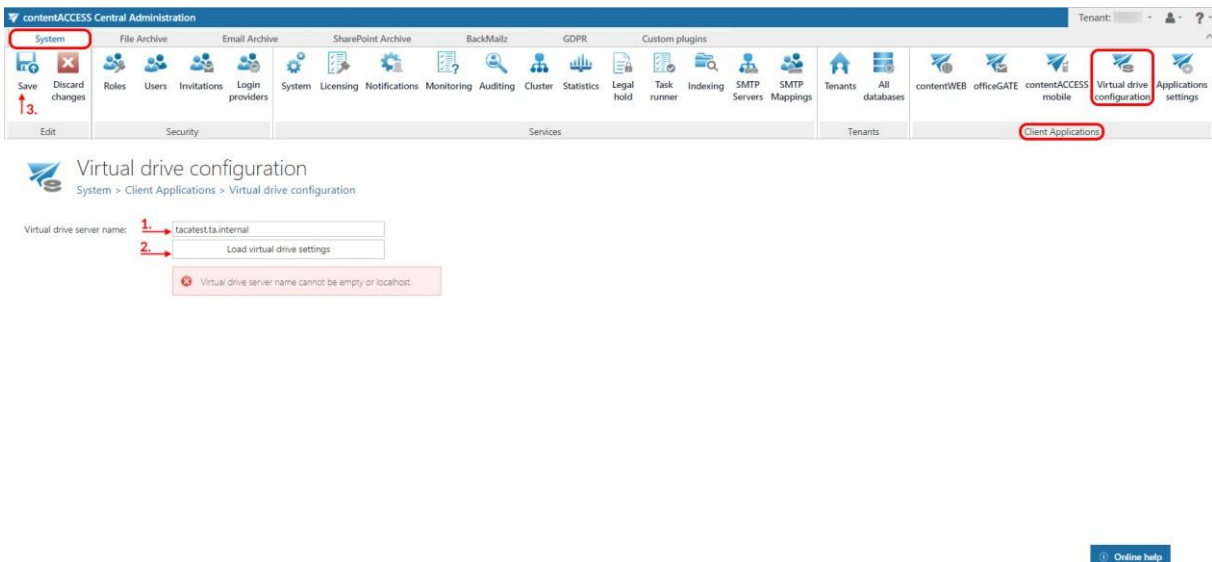
- **if the files are archived using shortcuts** and they need to be retrieved using these shortcuts
- **if the drive is used as a substitute of contentACCESS Portal** archive interface

Virtual drive is by default unzipped to C:\TECH-ARROW\contentACCESS_Package\Setups. For more information on how to install virtual drive, read the [contentACCESS Virtual Drive Installation Manual](#).



Virtual drive configuration

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.

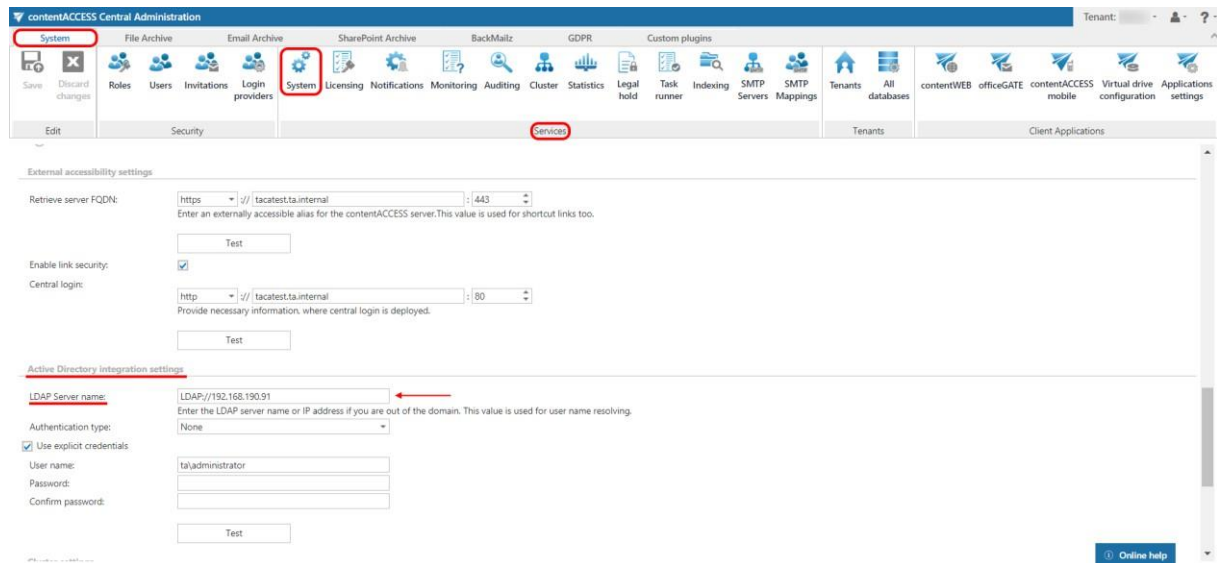


Active directory integration settings.

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.



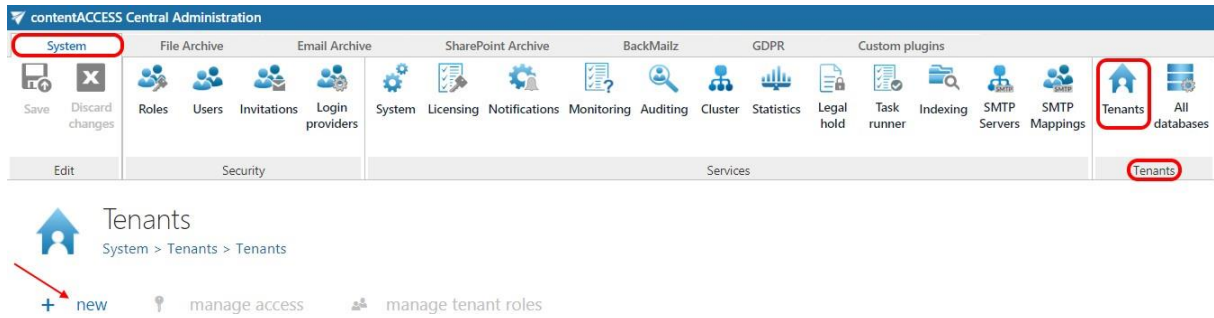
The screenshot shows the 'contentACCESS Central Administration' interface. The 'System' tab is selected, and the 'System' button in the ribbon is highlighted. The 'Active Directory integration settings' section is expanded, showing the following fields:

- Retrieve server FQDN:** https://tacatest.ta.internal:443
- Enable link security:**
- Central login:** http://tacatest.ta.internal:80
- Active Directory integration settings:**
 - LDAP Server name:** LDAP://192.168.190.91 (indicated by a red arrow)
 - Authentication type:** None
 - Use explicit credentials:**
 - User name:** ta/administrator
 - Password:** [Redacted]
 - Confirm password:** [Redacted]

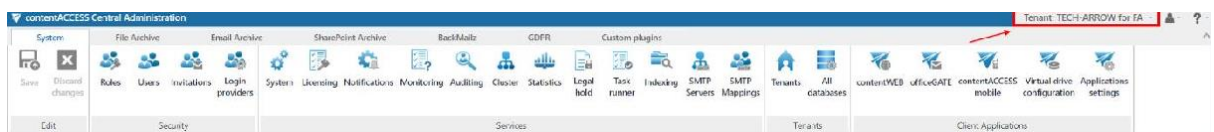
Adding a Tenant

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

Open the [Tenants](#) page (**System** => **Tenants** => **Tenants**) and click **+ new. Add and Configure** a new tenant & tenant administrator into the system.



The newly created tenant appears in the upper right corner of the **Central Administration** user interface, like on the picture below:



Note: If you want to read the detailed description of tenant creation and configuration, please, check [this](#) section of our online documentation.

Create the needed database(s) for your tenant

Open page [All databases](#) (**System => Tenants => All databases**), click **+ create new** and specify the required values in the **Database repository** window. Create a single SQL database to **TECH-ARROW for FA** tenant with connection name “File Archive DB” and Database user “DBAdmin”. The application will automatically set this first created database to default.

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



contentACCESS Central Administration

System

Save Discard changes

Roles Users Invitations Login providers

System Licensing Notifications Monitoring Cluster Statistics SMTP Servers

Tenants **All databases** Schedules

Edit Security Services Tenants

All databases
System > Tenants > All databases

+ configure existing + create new update all databases

Database repository

Connection name:

Use system database server (TANEWS)

Type:

Server name:

Database:

Schema:

Database user

Use explicit user

New or existing user:

Password:

Confirm password:

Connect with user

Use explicit credentials

User:

Password:

Confirm password:

✔ Database connection is successful!

Test database connection

Tenant:

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:

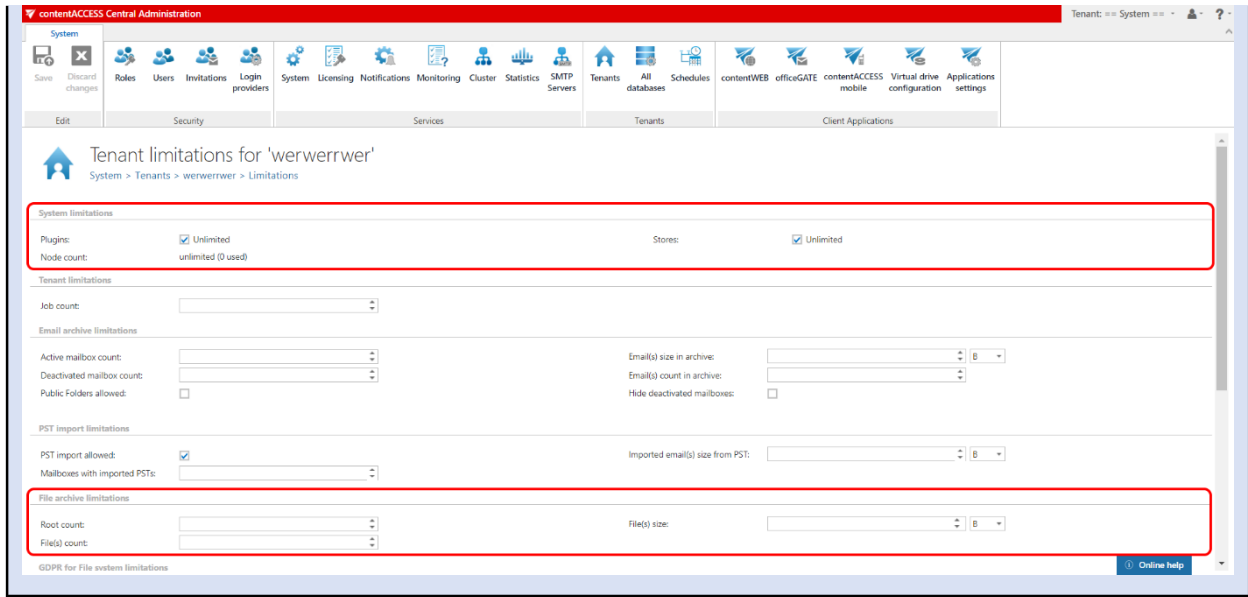
Use explicit credentials: if this checkbox is not checked, then contentACCESS will automatically connect to the database (MSSQL) under the contentACCESS service account. If you wish to connect with an explicit user, then specify an admin user with the rights to create a new database on the databaseserver.

Tenants: select the database owner tenant from the dropdown list (in our case **TECH-ARROW for FA**)

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.

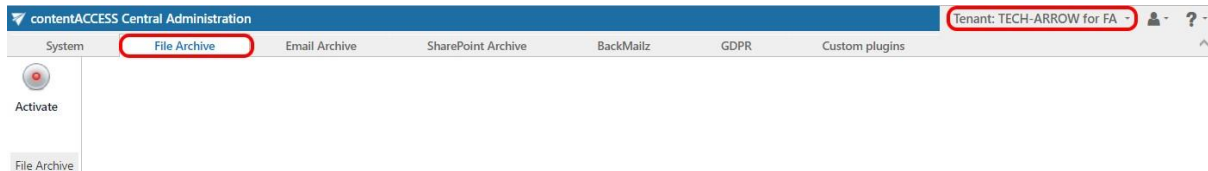
Tenant name	Tenant database	Search server url	Cluster group	Is enabled
TECH-ARROW for FA	MNEstestDB		Default	True

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:



File archive activation

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.



System settings

Open the [System settings](#) page (**File Archive** tab **Settings** group **System settings** button) and select the above created “File Archive DB” from the dropdown list. Deploy it.

The date, from which the retention of the documents will be calculated, can be selected here. Choose the setting to be applied from the dropdown list. Save your settings.



contentACCESS Central Administration Tenant: TECH-ARROW for FA

System	File Archive	Email Archive	SharePoint Archive	BackMailz	GDPR	Custom plugins
Save Discard changes	Databases System settings	Retentions Storages	Root folders Aliases Schedules Provisioning settings	Jobs	Remote agents Global rules	
Edit	Settings			Archive	Remote agents	

System settings

File Archive > Settings > System settings

Database settings

Database connection: → File Archive DB Change ✓

Retention settings

The retention of documents is either calculated from the time of archiving or from the file date. If file date is specified, here you can define which file date should be used for the retention calculation (reference date).

Retention reference date:

[Online help](#)

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

Retention settings

Open the [Retentions](#) page (**File Archive** tab **Settings** group **Retentions** button) and click **+ new** to create a 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 on the pictures below. Once the retention is created, save your changes.

contentACCESS Central Administration Tenant: TECH-ARROW for FA

System	File Archive	Email Archive	SharePoint Archive	BackMailz	GDPR	Custom plugins
Save Discard changes	Databases System settings Retentions	Storages	Root folders Aliases Schedules Provisioning settings	Jobs	Remote agents Global rules	
Edit	Settings			Archive	Remote agents	

Retentions

File Archive > Settings > Retentions

→ **+ new** manage access

Retention name	Protected retention time in months	Has unprotected retention time	Unprotected retention time in months	Is default	Calculated from	Description
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Retention repository ✕

Retention name:

Description:

Calculated from:

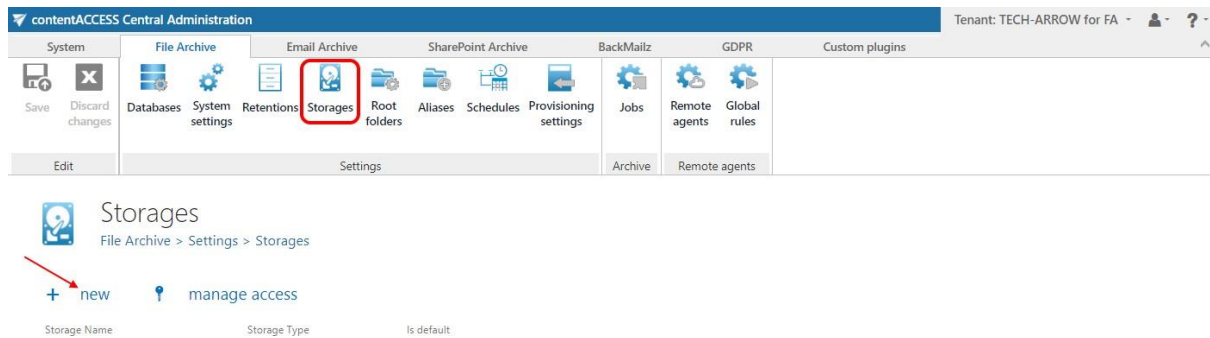
Protected retention time in months:

Has unprotected retention time

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.

Creating a single disk store

Open the [Storages](#) page (**File Archive** tab **Settings** group **Storages** button) and click on “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.



Storage repository ✕

Storage settings

Store name:	<input type="text" value="File Archive storage"/>
Store type:	<input type="text" value="Disk"/>
Path:	<input type="text" value="\\TACATEST\File Archive storage"/>
Use explicit credentials:	<input type="checkbox"/>
Username:	<input type="text"/>
Password:	<input type="password"/>
Confirm password:	<input type="password"/>
Compression:	<input checked="" type="checkbox"/> <i>(Compresses all files larger than 4KB except already compressed formats like JPG, AVI, MP3 etc. This feature might slow down the store functionality, but can spare storage space.)</i>
Enable SnapLock:	<input type="checkbox"/>
Use single instancing:	<input checked="" type="checkbox"/> <i>Only one instance of the physical file will be present on the store.</i>
Use file encryption:	<input type="checkbox"/> Files will be stored in encrypted form. Download the encryption key and store on a safe place.
Database connection:	<input type="text" value="File Archive DB"/> ✔

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.



Setting the 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, storage and index zone to the root. Assign “File Archive DB” and “File Archive storage” created a few steps earlier and the default index zone.

The screenshot shows the 'contentACCESS Central Administration' interface. The 'Root folders' button in the 'File Archive' settings group is highlighted with a red box. Below it, the 'Root folders' configuration page is visible, with the '+ new' button highlighted by a red arrow. A 'File Path' dialog box is open, showing the following configuration:

- Path:** \\TACATEST\Microsoft materials
- Use explicit credentials:** Use explicit credentials
- User name:** [Empty field]
- Password:** [Empty field]
- Confirm Password:** [Empty field]
- Type of connection:** On-premise file server
- Version:** -
- Server:** [Empty field]
- Test:** [Button]
- Database connection:** File Archive DB (with a green checkmark icon)
- Storage name:** File Archive storage
- Index zone:** Default index zone

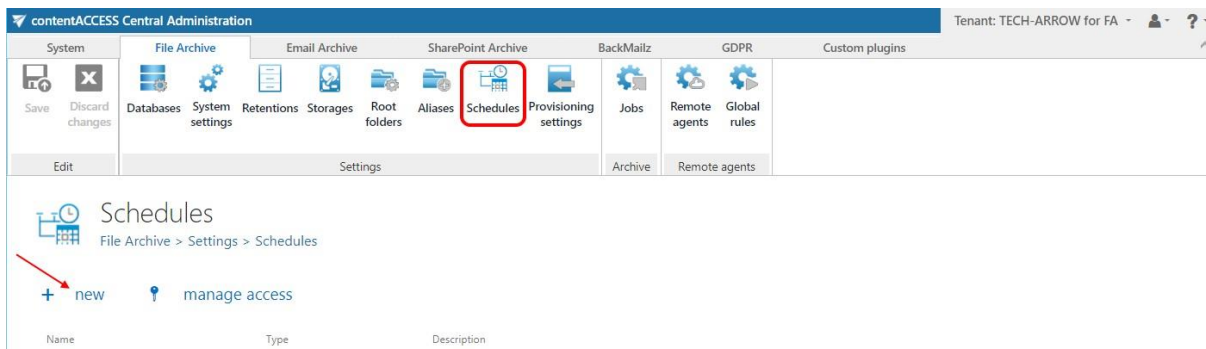
At the bottom of the dialog are 'OK' and 'Cancel' buttons.

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 in problems with 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.

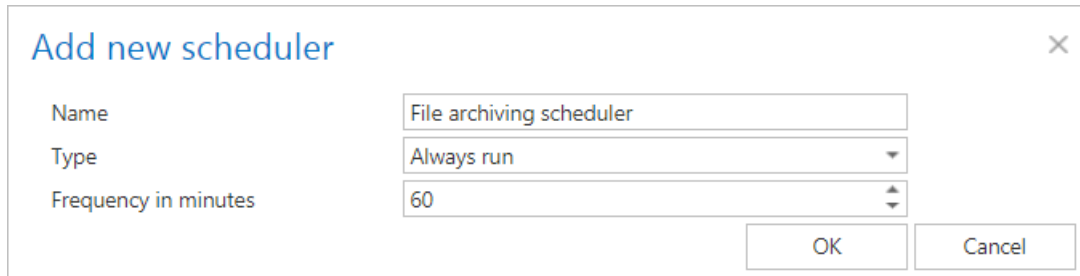
Creating the provisioning and archive schedulers

Create and 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 archiving scheduler properties:

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



Add new scheduler ✕

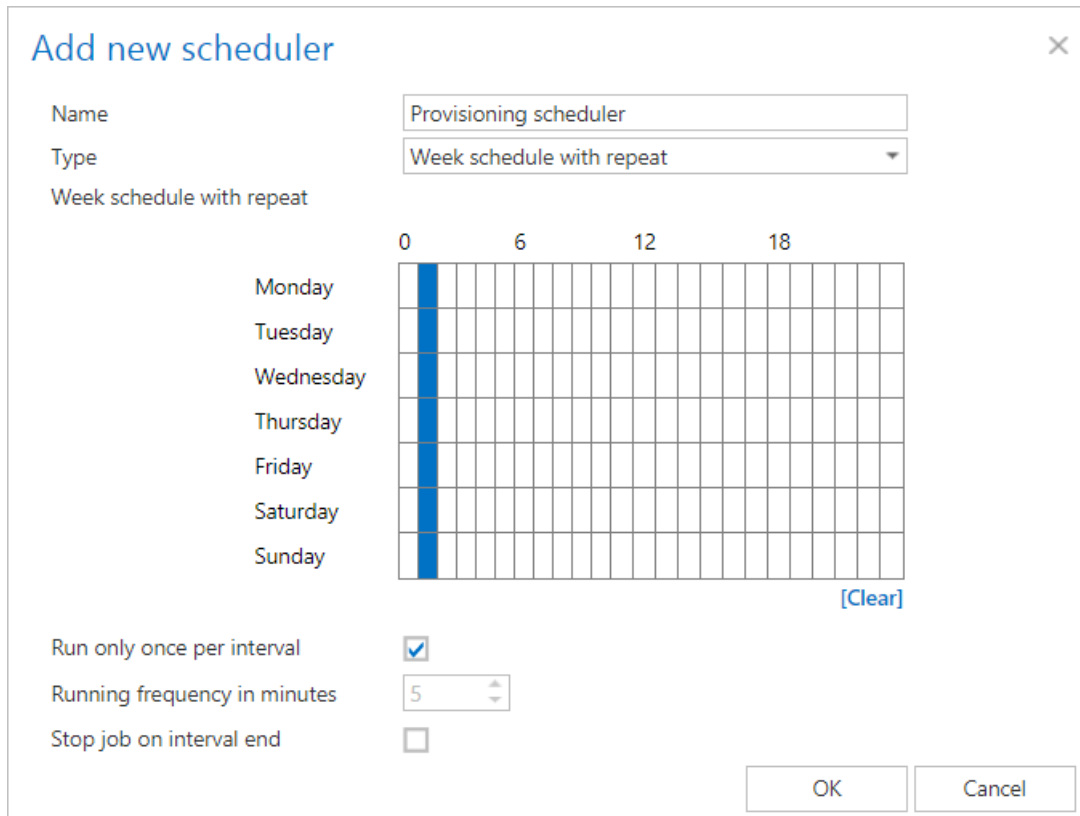
Name

Type

Frequency in minutes

2nd: Provisioning scheduler properties:

Click **+new** on the **Schedules** page. Create a “Week schedule with repeat” scheduler with name “Provisioning scheduler”. Fix the start time 1 AM – of the provisioning running in the week map. Check the **Run only once per interval** checkbox (we do not need to run the job multiple times in the interval).



Add new scheduler ✕

Name

Type

Week schedule with repeat

	0	6	12	18
Monday				
Tuesday				
Wednesday				
Thursday				
Friday				
Saturday				
Sunday				

[\[Clear\]](#)




Run only once per interval

Running frequency in minutes

Stop job on interval end

Save your changes.

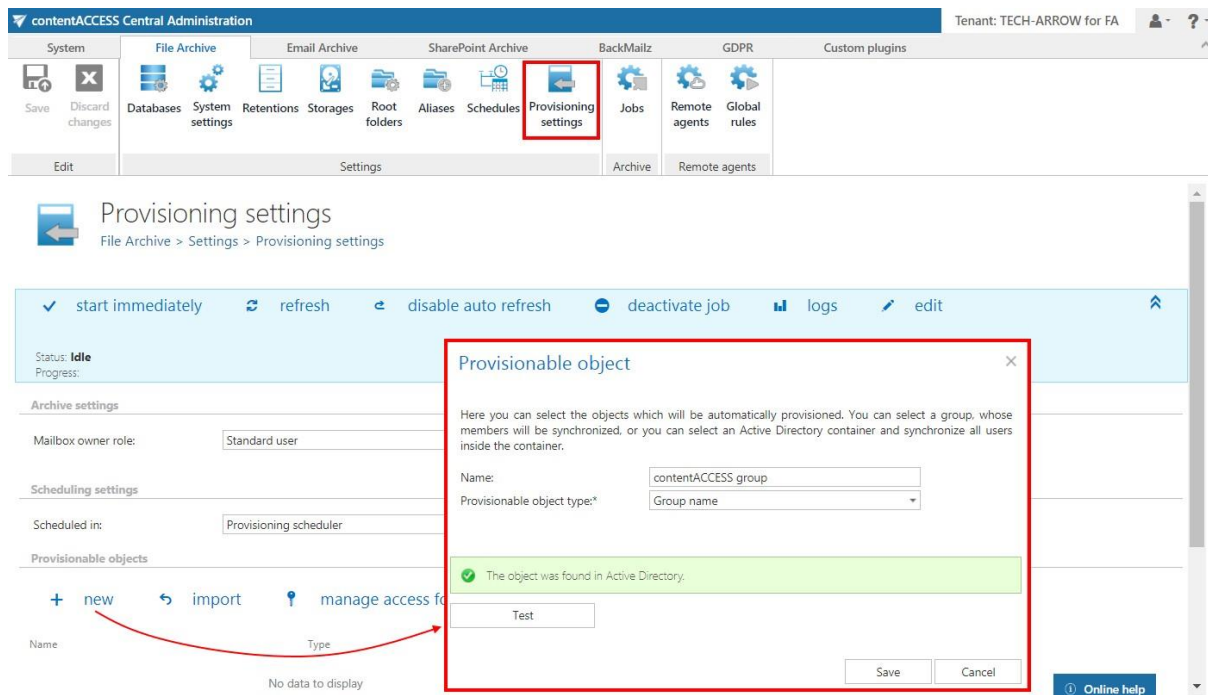
Configuring and running the File archive provisioning job

Open the [Provisioning settings](#) page (**File Archive** tab  **Settings** group  **Provisioning**  button).

To configure the File archive provisioning, the administrator is required to set

1. The role that will define the file archive user's permissions in contentACCESS Portal. Standard user role is available in the list by default, other roles with other permissions must be first configured on the **Roles** page.
2. The time periods, when the provisioning will run – this must be configured in section “Scheduling settings” – in our case, we will use the “Provisioning scheduler”
3. The objects to be provisioned – must be set in section “Provisionable objects”
4. Notification settings (optional)

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.



The screenshot displays the 'contentACCESS Central Administration' interface. The 'Provisioning settings' page is active, with the 'Provisionable objects' section highlighted. A modal dialog titled 'Provisionable object' is open, showing a success message: 'The object was found in Active Directory.' Below the message is a table with one row containing the name 'Test'. The modal also includes fields for 'Name' (contentACCESS group) and 'Provisionable object type*' (Group name), along with 'Save' and 'Cancel' buttons.

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 [contentACCESS Portal](#) File Archive and can view its associated

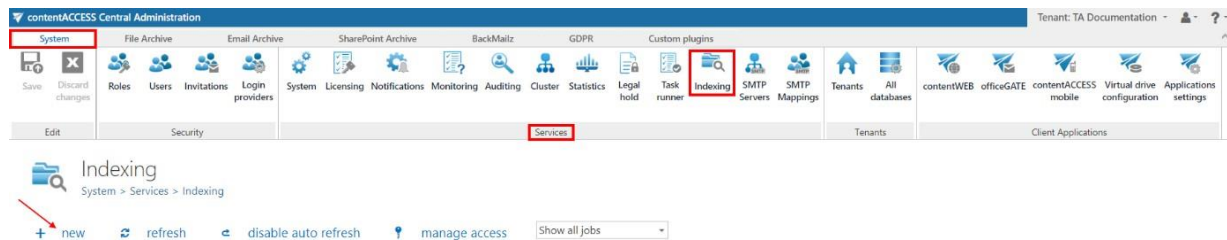
Provisionable objects can be also imported from files using the “import” option on the same page. contentACCESS Portal access right for a single user can be granted using the “manage access” option. For more information, refer to the online guide [here](#).

Now, you can create a File archive job.

Creating a Content indexing job

Now we create a **Content indexing** job, which will assign the selected index zone to emails of the selected entities.

- a) On the page of **Indexing** (*System* → *Services* → **Indexing**) click on **+ new** option under **Indexing**.



- b) **Name** the indexing job (in our case, FileArchive indexing) and select the node it will run on. Click on **Add**. When the system asks if you would like to configure this instance now, select **Yes**.

Add new job instance

Run on node:

Display name:

The administrator must configure these sections on the job's configuration page:

- c) **Scheduling settings** – run every 5 minutes
d) **Resource settings** – specify the number “4”



- e) **Filtering settings** – set here the file types that should and shouldn't be processed
- f) **Entities to index** – select the entities that will be processed by the job (in our case the EmailArchive group)
- g) **Index zone settings** - set the index zone that will be assigned to items by the indexing job (in our case, we will use the default one)
- h) **Notification settings** - you can set where and when to send emails about the potential errors

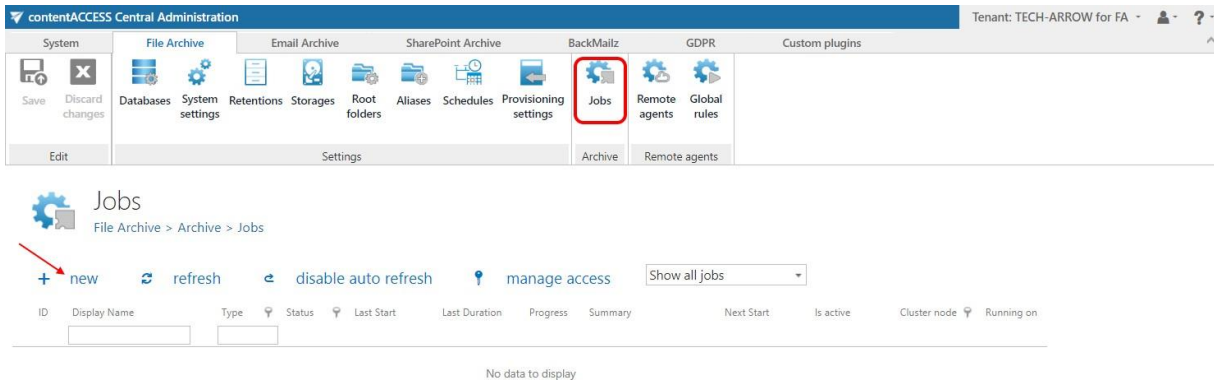
The screenshot shows the 'FileArchive indexing' configuration page in the contentACCESS Central Administration interface. The page is titled 'FileArchive indexing' and is located under 'System > Services > Indexing > FileArchive indexing'. The status is 'Idle'. The page includes several sections for configuration:

- Scheduling settings:** Scheduled in: Every 5 minutes.
- Resource settings:** Worker thread count: 4.
- Filtering settings:**
 - White listed file types: Process ONLY the selected file types. (Select file types)
 - Black listed file types: DO NOT process the selected file types. (Select file types)
- Entities to index:** A table with columns for Entity name, Tenant, Model type, and Entity type. One entity is listed: '\\TACATEST\Microsoft materials' with Tenant 'TECH-ARROW for FA', Model type 'FileSystemArchive', and Entity type 'Folder'.
- Index zone settings:** Index zone: Default index zone.
- Notification settings:** Send when: Never. Recipient list: john.doe@example.com, peter.white@example.com.

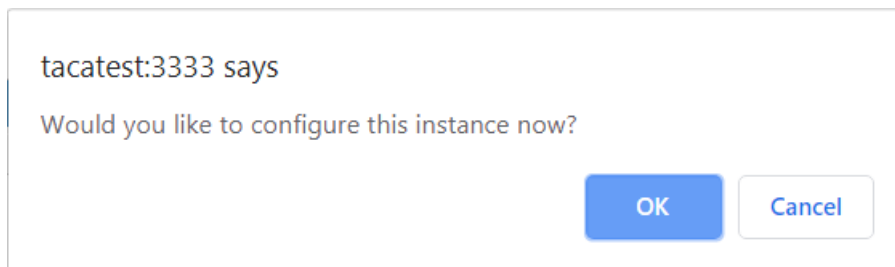
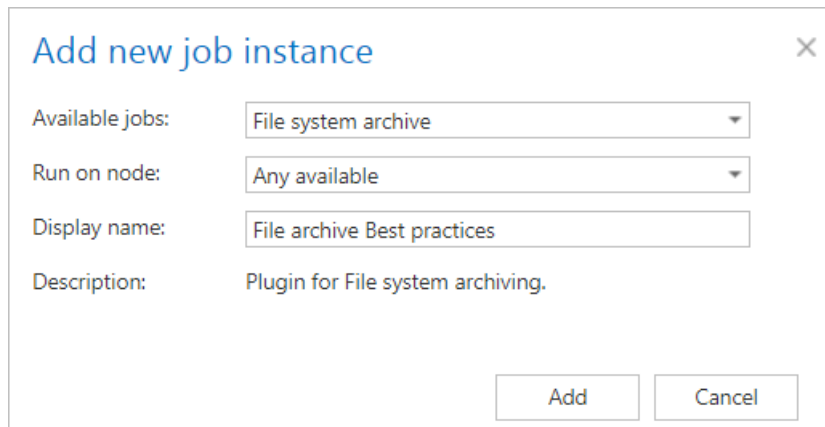
At the bottom right, there is an 'Online help' button.

Creating 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.



File archive job configuration

By clicking “OK” one step earlier, the job configuration page opens. Configure the storage, database, folder(s) to archive etc. 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 [\\TACATEST\Microsoft materials](#). Archived documents will be replaced with shortcuts to save space.



contentACCESS Central Administration Tenant: TECH-ARROW for FA

System | File Archive | Email Archive | SharePoint Archive | BackMailz | GDPR | Custom plugins

Save | Discard changes | Databases | System settings | Retentions | Storages | Root folders | Schedules | Aliases | Provisioning settings | Jobs | Remote agents | Global rules

Edit | Settings | Archive | Remote agents

File archive Best practices
File Archive > Archive > Jobs > File archive Best practices

start immediately | refresh | disable auto refresh | deactivate job | logs | edit

Status: **idle**
Progress:

a) Report mode settings
Use report mode:

b) Scheduling settings
Scheduled in: File archiving scheduler

c) Retention settings
Retention: 10 years

d) Shortcut settings
Shortcut processing type: Create shortcut from original item
Virtual drive server name: Use default (tacatest.internal)

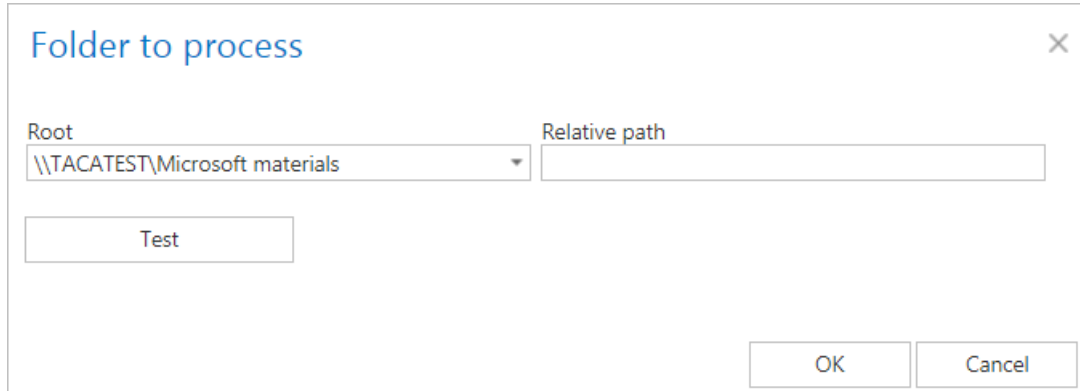
e) Folders to process
+ new | ↶ import
Root: \\TACATEST\Microsoft materials | Relative path: ...

f) Exclude folders
+ new | ↶ import
Pattern: No data to display

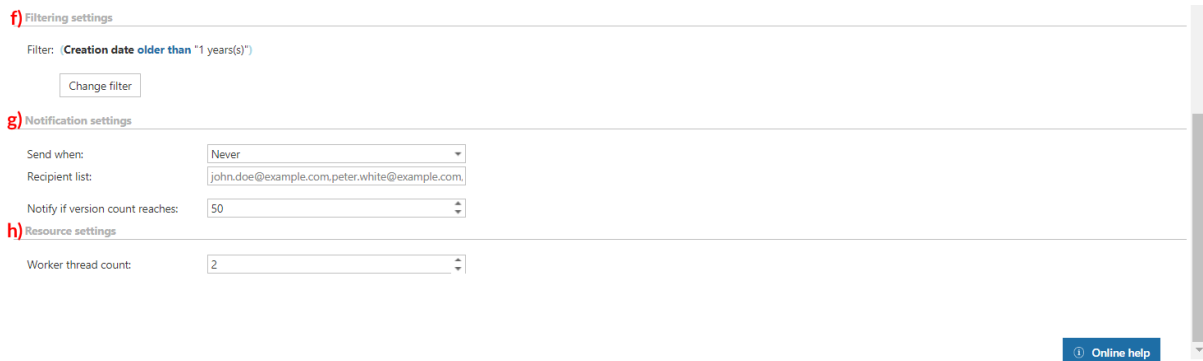
Configuration details:

- a) **Report mode settings:** In this case, we can skip this section.
- b) **Scheduling settings:** Set the configured “File archiving scheduler” scheduler that will start your job every hour, as defined.
- c) **Retention settings:** Set the configured “10 years” retention.
- d) **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.

- e) **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 [\\TACATEST\Microsoft materials](#) share will be archived. Test the connection and click “OK”.



- f) **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.



- g) **Filtering settings:** Use this option to set any filters that must be used. In this use case, we will archive everything older than 1 year. Click on the “Change filter” button and set the required time period in the next dialog:

Filter settings ✕

visual text

**A
N
D** ▼

Creation date ▼ Older than ▼ 1Y 📅 ✕

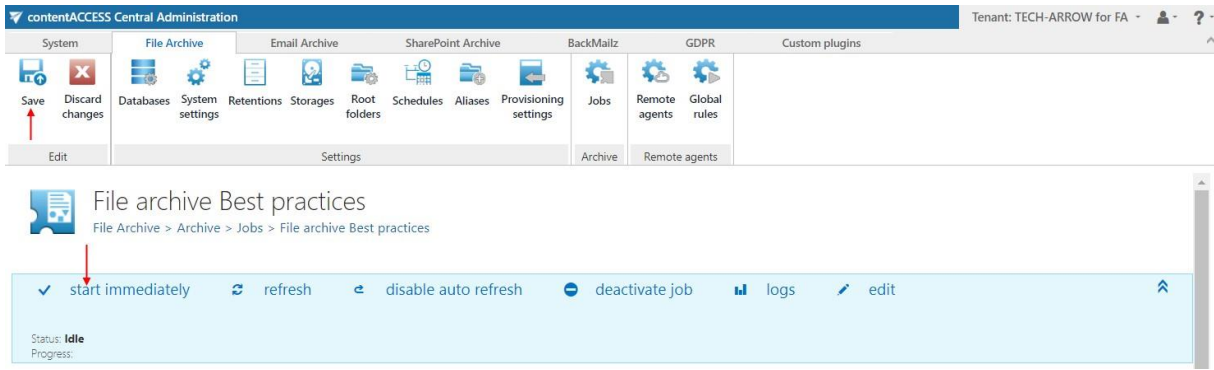
[+add group](#) [+add condition](#)

[+add new group](#)

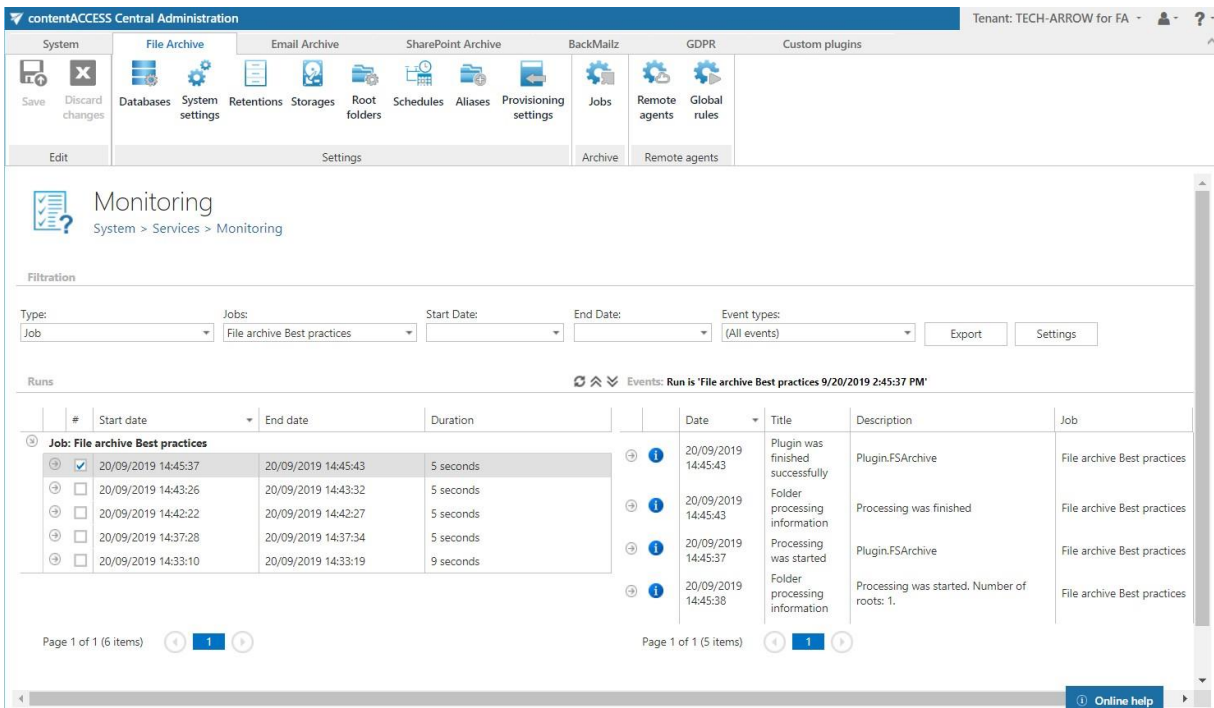
h) **Notification settings:** If you want to get notification emails about any errors or warning that might occur due to any misconfigurations, you can set it here. Now, we skip these settings.

i) **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. 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 if desired:



Access your archived files using the shortcuts (screenshot A) or search in the archive using the virtual drive (screenshot B). You can also view your archived files in [contentACCESS Portal](#). Enjoy it 😊



Name	Date modified	Type	Size
10-crucial-security-tips-to-reduce-data-l...	5/19/2017 3:26 PM	Shortcut	2 KB
a-1024x768.jpg	3/28/2017 3:42 PM	Shortcut	2 KB
ai-email.jpg	2/22/2017 3:26 PM	Shortcut	2 KB
cloud.mail_.jpg	2/7/2017 2:40 PM	Shortcut	2 KB
microsoft_patch.png	5/15/2017 3:50 PM	Shortcut	2 KB
microsoft-building.jpg	3/10/2017 3:16 PM	Shortcut	2 KB
microsoft-e1452011064246.jpg	7/12/2017 3:29 PM	Shortcut	2 KB
microsoft-european-union.jpg	4/25/2017 3:08 PM	Shortcut	2 KB
microsoft-office-365-logo-100630074-pr...	2/17/2017 3:02 PM	Shortcut	2 KB
microsoft-office-365-logo-100684405-la...	1/24/2017 12:55 PM	Shortcut	2 KB
Microsoft-OneDrive-logo-official-1-696x...	2/23/2017 1:58 PM	Shortcut	2 KB
MS_cloud.jpg	3/21/2017 4:19 PM	Shortcut	2 KB
ms-office.jpg	4/11/2017 2:24 PM	Shortcut	2 KB
office-101-badge.png	3/17/2017 2:10 PM	Shortcut	2 KB
office-365-1024x640.jpg	2/28/2017 2:34 PM	Shortcut	2 KB
office365-box-1024x1024.jpg	2/3/2017 2:01 PM	Shortcut	2 KB

Screenshot A

Name	Date modified	Type	Size
10-crucial-security-tips-to-reduce-data-l...	5/19/2017 3:26 PM	JPEG image	41 KB
a-1024x768.jpg	3/28/2017 3:42 PM	JPEG image	67 KB
ai-email.jpg	2/22/2017 3:26 PM	JPEG image	127 KB
cloud.mail_.jpg	2/7/2017 2:40 PM	JPEG image	16 KB
microsoft_patch.png	5/15/2017 3:50 PM	PNG image	62 KB
microsoft-building.jpg	3/10/2017 3:16 PM	JPEG image	37 KB
microsoft-e1452011064246.jpg	7/12/2017 3:29 PM	JPEG image	231 KB
microsoft-european-union.jpg	4/25/2017 3:08 PM	JPEG image	71 KB
microsoft-office-365-logo-100630074-pr...	2/17/2017 3:02 PM	JPEG image	10 KB
microsoft-office-365-logo-100684405-la...	1/24/2017 12:55 PM	JPEG image	22 KB
Microsoft-OneDrive-logo-official-1-696x...	2/23/2017 1:58 PM	JPEG image	14 KB
MS_cloud.jpg	3/21/2017 4:19 PM	JPEG image	81 KB
ms-office.jpg	4/11/2017 2:24 PM	JPEG image	22 KB
office-101-badge.png	3/17/2017 2:10 PM	PNG image	5 KB
office-365-1024x640.jpg	2/28/2017 2:34 PM	JPEG image	28 KB
office365-box-1024x1024.jpg	2/3/2017 2:01 PM	JPEG image	60 KB

Screenshot B