



# Arcsys Web

## Arcsys Web Interface User Manual

25.3.1.STS  
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	Arcsys Web Interface User Manual	

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# Preface

## 1. Introduction

This document describes the Arcsys Web Agent of the **Arcsys** software as well as its functionalities.



### Note

The Arcsys Web Agent will be discontinued and replaced by the ArcWeb Module. ArcWeb will encompass all the current functionalities of the Arcsys Web Agent, plus several new features. The Arcsys Web Agent will continue to be supported but won't be updated with any new features.

ArcWeb already offers a range of capabilities, including archiving, archive consultation, editing, search, workflow management, and functional administration. We encourage new users or those exploring new use cases to start with the current version of ArcWeb to fully benefit from its functionalities, rather than investing time in the soon-to-be-phased-out Arcsys Web Agent.

## 2. Reference Documents

### 2.1. Concepts

Arcsys Presentation Manual: **[Arcsys-presentation-25.3.1.STS-en.pdf](#)**

Arcsys Functional Description Manual: **[Arcsys-functional-description-25.3.1.STS-en.pdf](#)**

### 2.2. Installing and Updating

Arcsys Prerequisites Manual: **[Arcsys-requirements-25.3.1.STS-en.pdf](#)**

Arcsys Installation Manual: **[Arcsys-installation-25.3.1.STS-en.pdf](#)**

### 2.3. Operations

Arcsys Administration Manual: **[Arcsys-administration-25.3.1.STS-en.pdf](#)**

Arcsys Errors Manual: **[Arcsys-error-25.3.1.STS-en.pdf](#)**

	<b>Arcsys</b>	ARCCO- EN09-25.3.1.STS-0
	Arcsys Web Interface User Manual	

## 2.4. GUI

Arcsys Web Interface User Manual: **Arcsys-web-25.3.1.STS-en.pdf**

Interface Guide: **Arcsys-web-end-user-25.3.1.STS-en.pdf**

## 2.5. Development

Arcsys API Manual: **Arcsys-api-25.3.1.STS-en.pdf**

## 2.6. Option guides

ArcHP Option Guide: **Arcsys-option-archp-25.3.1.STS-en.pdf**

ArcREF Option Guide: **Arcsys-option-arcref-25.3.1.STS-en.pdf**

## 2.7. Optional modules

BatchReporting: **BatchReporting-UserGuide-25.3.1.STS-en.pdf**

ClassAssigner: **ClassAssigner-UserGuide-25.3.1.STS-en.pdf**

MetadataReplacement: **MetadataReplacement-UserGuide-25.3.1.STS-en.pdf**

StartRetentionDateAssigner: **StartRetentionDateAssigner-UserGuide-25.3.1.STS-en.pdf**

## 3. Symbols and Meanings



### Note

Identifies information of particular interest



### Important

Identifies important information

## 4. Definitions and Abbreviations

See the [Glossary](#)

# Part 1. General overview

# 1. Overview

The purpose of the Arcsys Web Agent is to offer a simple and efficient graphical interface to manage and control all archiving and retrieval functions available with Arcsys.

## 1.1. Principles

### 1.1.1. Design

All screens shown in the Arcsys Web Agent have the same structure and respect the same flowchart.

Furthermore, all elements found in the top right corner of the web interface provide information on the connected user.

- User account details: This button displays the name of the current user and the group to which they belong.
- Sign out: This button enables users to sign out of the system.
- Password: This button enables users to change their password.

The top left corner of the web interface contains information regarding the software version and the current page.

- Arcsys: Displays the Arcsys logo and version.
- Current page: This banner reminds users of the sections displayed on the current page. These tabs cannot be clicked.

The left column displays different information.

- Main menu: This menu contains all the functions that users can access.
- Current selection: This area contains the elements selected in the current session (*repository, lot, collection, etc.* – see [glossary](#)). It also designates the items on which the current operation is being applied.

### 1.1.2. Error Pages

Error pages are always identical in structure. A clear message enables users to identify the cause of the error and a button allows them to return to the previous page.

Figure 1.1, “Error Page” [3] displays the error page shown when a user has not been identified by the application:



### 1.1.3. List of Elements: Advanced Functionalities

Each screen depicting a list of items includes advanced search and sort features:

- "Filter zone": These filters refine searches when accessing the relational database (required for large volumes of data).
- "Sort": Users can sort the results using the white arrows.



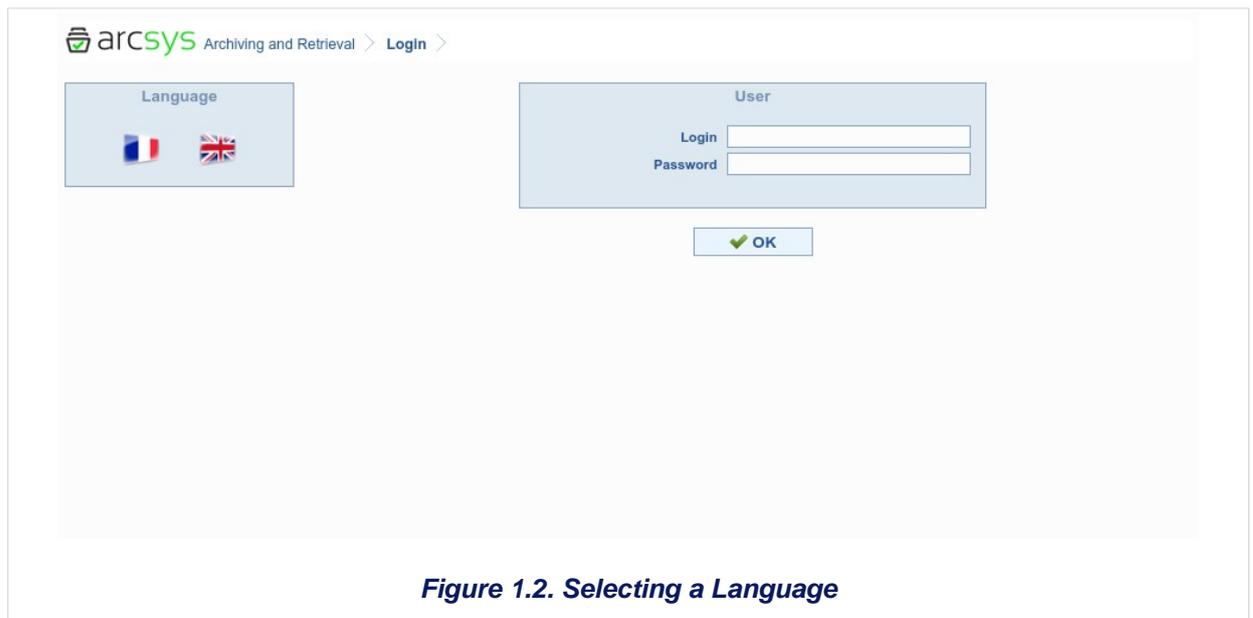
#### Note

The number of items displayed per page can be set in the web configuration file.

The values of this setting can be defined, screen by screen, through configuration files. See the [Arcsys Administration Manual](#).

## 1.2. Internationalization

The Arcsys web interface is available in two languages: French and English. The language selection is made on the first screen of the application, choosing one of the flags available:



## 1.3. Concepts

The concepts of *Repository*, *Collection*, *Lot*, *Object*, *Keyword*, *Mask* and *Value* used in this manual are defined in the [glossary](#). You can also refer to the [Arcsys Presentation Manual](#), which explains these concepts in greater detail.



### Important

The label values in the GUI may differ from the names used in this manual. For example, the label "Base" is still used instead of "Repository".

## 2. Functions: How do I...?

This chapter contains several tutorials explaining the different actions to be performed when using most of the functions of the web interface.

Further details and screenshots on the functions can be found in the second half of this manual.

### 2.1. Creating a storage policy

A storage policy describes the way in which the records are managed over time. It contains a number of user-defined rules describing the media used and the retention time on the media (see the [Glossary](#)).

#### 2.1.1. Instructions

Creating a storage policy involves three stages:

- Defining the physical storage media in the relational database;
- Creating the storage policy
- Associating the storage policy with the physical storage media.

#### 2.1.2. Physical Media

The physical media are the storage resources used when archiving. They are also referred to as "storage zones" by Arcsys.

The definition of new storage zones is described in [page 63](#), « [Managing Zones](#) ». The zones thus defined are valid for all repositories registered in Arcsys.

#### 2.1.3. Creating a storage policy

Storage policy creation is detailed in [page 68](#), « [Managing and Selecting Storage Policies](#) ». A storage policy is associated with a collection when the collection is created (detailed in [page 20](#), « [Managing and Selecting Collections](#) »).

#### 2.1.4. Associating Storage Policies–Storage Zones

This section defines the order in which the physical media are used, the time the records will remain on each media, and the number of record copies to be made on each of them.

The screens for these settings are explained in detail in [Page 71](#).

## 2.2. Archiving a File List

This chapter describes all the stages in which a list of files is archived using an empty Arcsys repository.

In this way, together with the second part of this manual, the overall operation of the Arcsys Web Agent is described.

The order given here for the different tasks to be completed to create an archiving order must be followed. Each stage essentially requires that the previous stage be fully completed.

### 2.2.1. 1 – Creating a Mask

A mask consolidates a list of keywords for easy referencing of records. Each mask can contain as many keywords as required.

Creating a mask is described in [page 48](#), « [Managing and Selecting Masks](#) ».

### 2.2.2. 2 – Creating Keywords

After mask creation, the keyword that will be assigned to this mask must be created. Each record using this mask will have the same list of keywords, although these may have different values. They must describe the created records as well as facilitate searches.

The screens used to create keywords are described in [page 42](#), « [Managing and Selecting Keywords](#) ». For certain types of keywords (controlled types), you may need to create values and assign them to the keywords. The screens used to perform these tasks are described in [page 46](#), « [Gestion des types controles](#) »

### 2.2.3. 3 – Assigning Keywords

All keywords should be associated with the created mask. This operation is described in [page 48](#), « [Managing and Selecting Masks](#) ».

### 2.2.4. 4- Creating a Storage Policy

A storage policy is required to create a collection. Storage policy creation is described in [page 5](#), « [Creating a storage policy](#) ».

## 2.2.5. 5 – Creating a Collection

A collection is a set of rules used by the records. These rules can be used by a number of different records.

The screens used to create a collection are described in [page 20](#), « [Managing and Selecting Collections](#) ».

## 2.2.6. 6 – Creating a Lot

The lot is the archiving unit. It can group together an unlimited number of objects.

To create a lot, refer to [page 27](#), « [Managing and Selecting Lots](#) ».

## 2.2.7. 7 – Creating Objects

For each file to be archived, an object needs to be created, indicating the location of the file on the target machine.

Creating an object is described in [page 34](#), « [Managing Objects](#) ». This stage should be repeated as many times as there are files to be added to the record.

## 2.2.8. 8 – Selecting an Agent

All the files in a lot must be located on the same target machine. For archiving purposes, you must select an Arcsys Application Agent located on this target machine.

To select the agent on which the archiving must be performed, refer to [page 85](#), « [Listing and Selecting Agents](#) ».

## 2.2.9. 9 – Creating the Archiving Order

Once the whole system is set up; only the archiving order remains to be created.

This part is described in [page 75](#), « [Archiving: Creation](#) ».

The progress of the archiving process can be followed on the archiving tracking screen.

## 2.2.10. Retrieval

All the screens for retrieving records are explained in detail in [page 76](#), « [Retrieval: Creation](#) ».

## 2.3. Searching for a Record

See Interface Guide.

## Part 2. Detailed Overview

# 1. Identification

The first page of the application is a sign-on page. When users enter their username and password, they are automatically redirected to:

- An error page if authentication fails;
- A specific page if the user belongs to a redirected group (see [Arcsys Administration Manual](#));
- The page for selecting the repository where the user wishes to work, as well as an administration menu.



**Figure 1.1. Identification**

## 2. Data Management

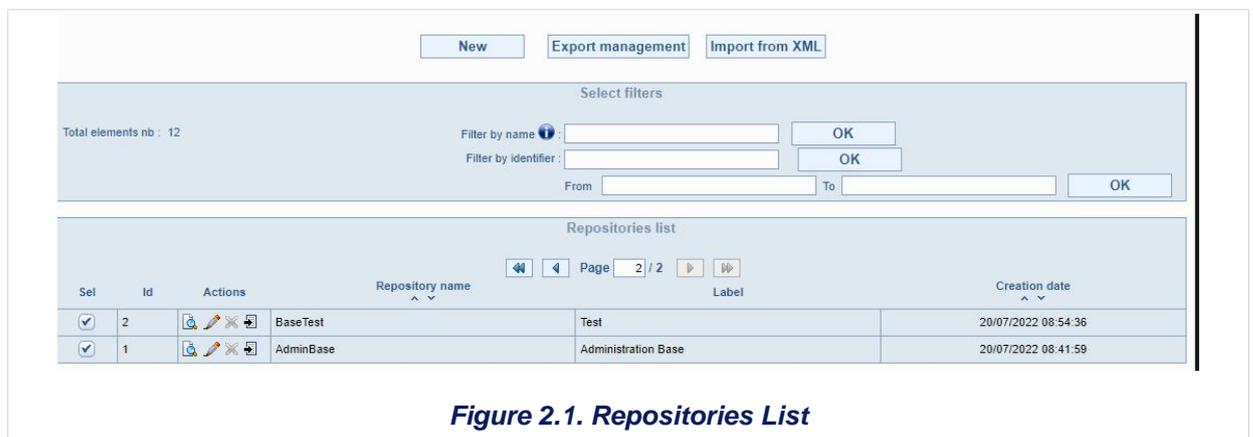
### 2.1. Managing and Selecting Repositories

The screens for managing repositories are accessed from the **Repositories Administration** menu.

This menu is used to:

- List and search existing repositories
- Create new repositories
- Edit existing repositories
- Delete repositories
- Select a repository
- Export a profile in XML format
- Manage exports backed up on the server (downloads, imports, deletes)
- Import a repository in XML format using an external backup (upload)

The following screen [Figure 2.1, “Repositories List” \[11\]](#) lists the application's repositories. Use the search bar to add filters for the repository names or IDs.



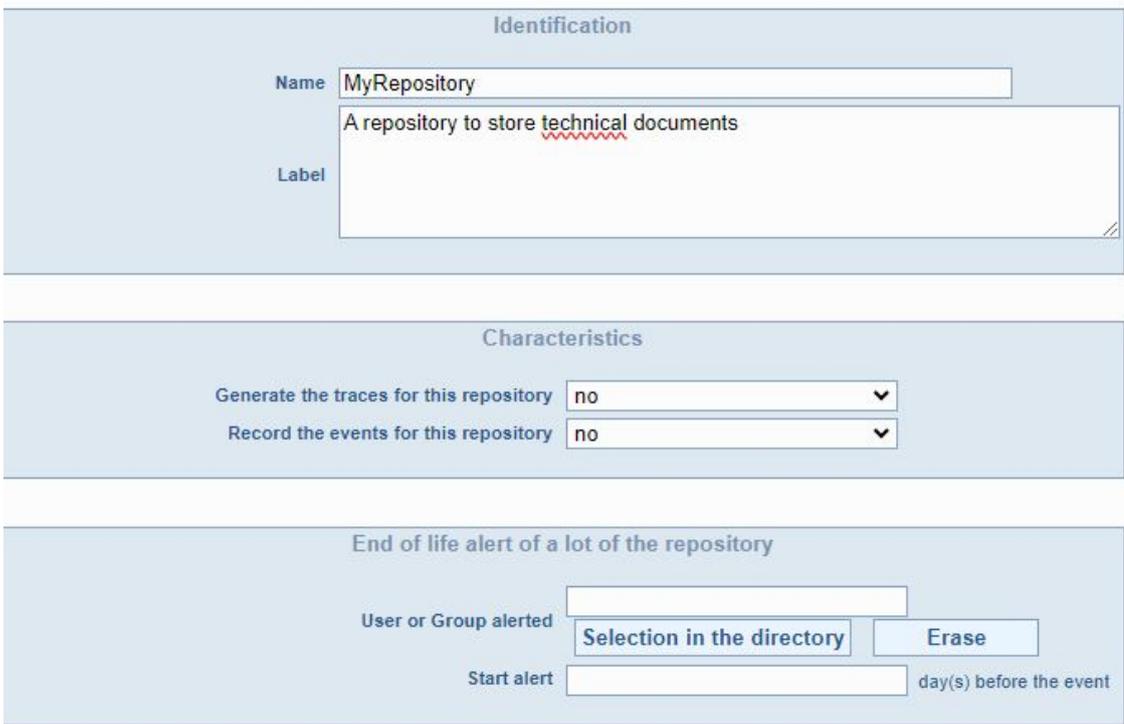
#### 2.1.1. Selection

Most of the software's functions refer to objects contained in a specific repository. You must therefore select the working repository.

To select a repository, simply click on the symbol  at the start of the line. Once the repository is selected, the main menu changes and the repository appears in the "Current Selection" zone (see [Figure 2.10, “Collection List” \[21\]](#)).

## 2.1.2. Creation

Click on the **New** button located at the top of the page to access the page for creating a new repository (Figure 2.2, “Creating a Repository” [12]).



**Figure 2.2. Creating a Repository**

- **Identification:** The code for this entity must be unique and must not include the following characters: ;, \, /, ", ' . The label of this entity must not include the following characters: ;, \, /, " (the ' character is authorized). All other UTF-8 characters in the code or label are authorized.
- *Alert for disposal or migration of a repository lot:* You can choose a user or group of users to receive an alert when a lot in the repository is about to reach its scheduled end of retention date or be migrated. Click the **Directory Selection** button to directly select it in the LDAP directory (free entry is not possible).

You can also set the number of days before the event at which the alert will be sent.



### Note

When the **EVENT\_ALERT\_TO\_ADMIN** Arcsys Engine setting is true, an email will be sent to the alert administrator list specified in the **EVENT\_ALERT\_ADMIN\_MAIL\_LIST** setting (see [Arcsys Administration Manual](#)).

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- **Permissions:** You can precisely define the rights of other Arcsys users for a specific repository.

To do this, you can add users or groups for the repository and allocate *Base Visibility* or *Base Management* rights to them.

The *Add my groups* button adds all the groups of the current user account to the list of permissions.

The *Default* button cancels all permission modifications that have not yet been validated.

See the *NAME\_FUNCTIONAL\_DESCRIPTION\_MANUAL* for full information on managing rights and permissions in Arcsys.

- **Saving:** After informing the fields and selecting the options, click the **Finish** button to conclude repository creation. The **Cancel** button returns you to the repository list, disregarding any changes made to the page.

### 2.1.3. Edition or Display

You can access the edit page of an existing repository (identical to [Figure 2.2, “Creating a Repository” \[12\]](#)) by clicking on the icon  of the repository to be edited in the list.

You can access the page where an existing repository can be viewed (identical to [Figure 2.2, “Creating a Repository” \[12\]](#)) by clicking on the icon  of the repository to be displayed in the list.

The editing and display screens are largely identical to the screens for creating a repository, so they will not be detailed here. See the section on creating a repository for an explanation of each of the fields.

### 2.1.4. Export

In the folder specified by the *STOCK\_USER\_REP* parameter in the Arcsys Web Agent, the export of the repository exports (in XML form):

- The repository with its details (code, label, etc.);
- The permissions associated with this repository and their features (type, rights, etc.);
- The disposal and migration alerts associated with this repository and their details (user, group, etc.);

- The entities associated with the repository (storage policies, keywords, masks, collections and classifications schemes) and their details (code, label, permissions, etc.).

## 2.1.5. Managing Exports

Click the *Export Management* button to access the list of repositories previously exported in the backup directory (see Figure 2.3, “Managing Repository Exports” [14]): You can also:

- Download the repository export (compressed file containing the different XML files associated with the repository export) via the *Zoom* button;
- Import the repository via the *Import from XML* button (a new code will be requested before import of the repository);
- Delete the export of a repository via the Trash bin button (the associated storage policy, mask and collection XML files are not deleted).

Date of export	Repository code	Action	Repository label
24/09/2021 10:55:41	Category5135		For documents of category 5135
24/09/2021 10:55:39	Native files		Used for native files
24/09/2021 10:55:32	Sales		All sales documents
24/09/2021 10:55:31	Native files		Used for native files
24/09/2021 10:55:22	Category5135		For documents of category 5135
24/09/2021 10:55:18	AdminBase		Administration Base
24/09/2021 10:55:03	Sales		All sales documents
24/09/2021 10:54:40	Catagory 47		For Category 47
24/09/2021 10:54:36	Arvitam		Arvitam documents
24/09/2021 10:52:23	Native files		Used for native files

[Repositories list](#)

Figure 2.3. Managing Repository Exports

## 2.1.6. Importing a Repository

The *Import from XML* button is used to download the export server of a repository. The downloaded file must be a compressed file containing the information required to import a repository. Once the file is selected, you can choose a code for this new repository or keep the existing code in the export (if a repository with the same code already exists in the relational database, the import will not take place).

## 2.1.7. Deletion

For each of the repositories for which the connected user has deletion rights, the icon is enabled (Figure 2.1, “Repositories List” [11]). Click on this button to

display a confirmation window. The selected repository is then deleted from the Arcsys Database.



## Warning

**Deletion is only possible if no lot has been archived in this item.**

## 2.2. Managing Classification Schemes

The classification scheme can be viewed and edited. You can access it in two different ways:

- After selecting a repository and clicking on the "Classification Scheme" submenu in the "Entities" menu;
- By clicking on the "Classification Scheme" submenu in the "End user" menu.

### 2.2.1. General

The classification scheme is depicted as a tree, organizing the classes according to their hierarchy in the classification scheme they belong to.

- If the classification scheme was accessed via the "End user" menu, all classification schemes are available in the tree root (reminder: There is one classification scheme per available repository in the Arcsys system).
- If the classification scheme is accessed after selecting a repository, a single classification scheme is available in the tree root (that associated with the selected repository).

A lot and/or objects associated with the parent class and whose organization is identical to that displayed in the search results in tree form can be added to the ends of the branches of a classification scheme (leaf nodes).

The lot is not displayed unless it contains objects.

### 2.2.2. Details

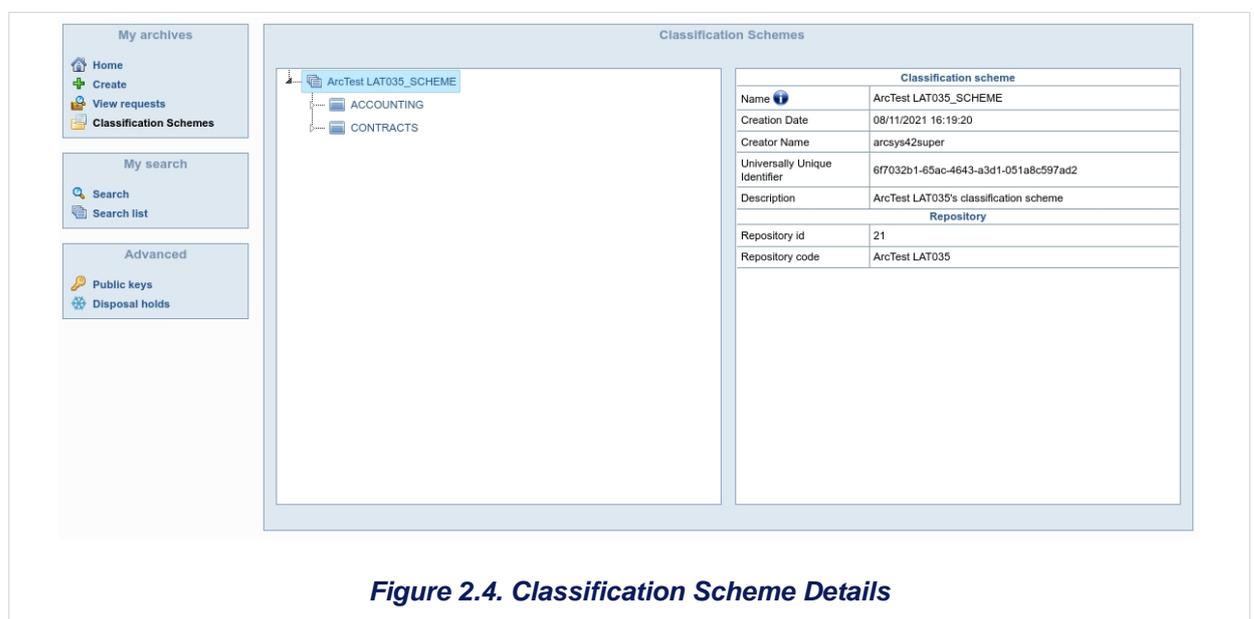
When an item of the tree is selected (classification scheme, class, lot or object), the detail of the item is displayed in the right screen.

When a directory is selected, the list of files included in the directory is displayed.

Here is the information for each file: file privileges, file size, and date of last modification. (see Figure 2.4, "Classification Scheme Details" [16]).

The view of the details of the classification scheme displays the following information:

- Title
- Creation date
- Author
- Unique Universal ID (UUID)
- Description
- Associated repository code



**Figure 2.4. Classification Scheme Details**

The view of the details of a single class displays the following information:

- Title (path of the class in the classification scheme)
- Creation date
- Author
- Status (Active/Inactive)
- Unique Universal ID (UUID)
- Description
- Subtitle (class name)
- Comments

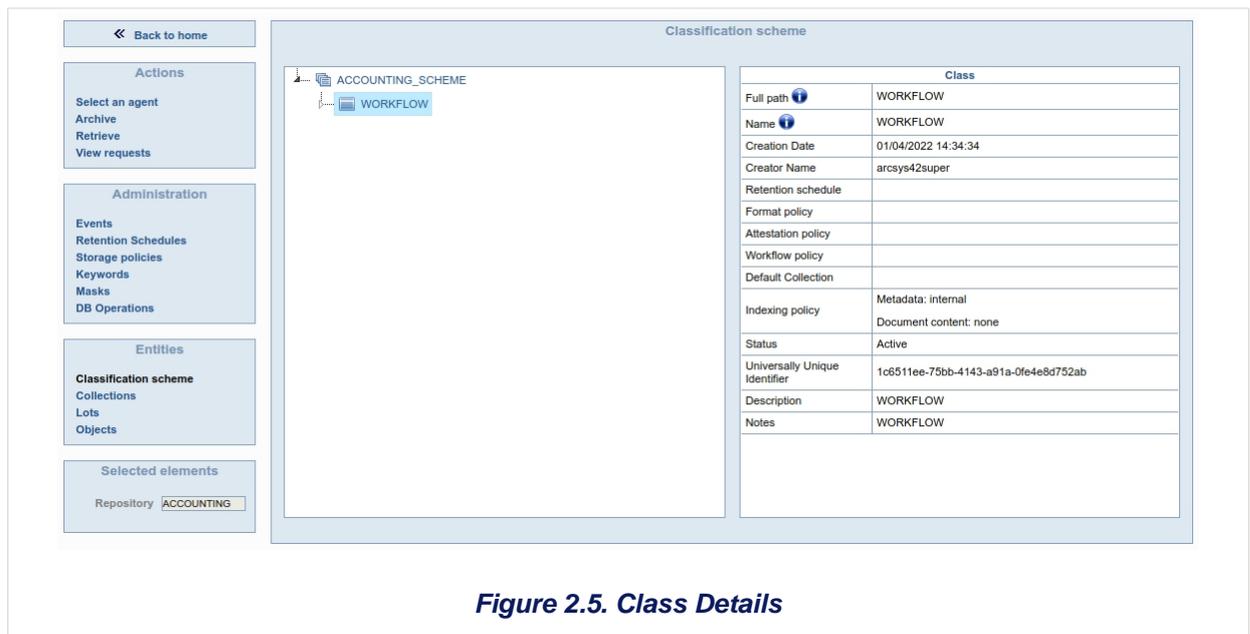


Figure 2.5. Class Details

### 2.2.3. Edition

When an edit request is made for an item in the classification scheme tree, you can edit the modifiable details of the item on the right. The changes are applied when you click on the "Apply" button. The changes are canceled when you click on another item in the tree without previously clicking on the "Apply" button.

### 2.2.4. Possible Actions

In the tree, right-click on the classification scheme, class, repository, lot or directory (provided the directory is an object in the Arcsys context) to access the entity's display screen.

You can also double-click on the repository, collection or lot in the lot detail display screen to access the entity display screen.

Double-click on a file in the display screen of the list of files in a directory to access the object display screen.

*Edit:* This action is available for all entities in the tree to edit its properties if you have the appropriate permissions. For the classes and the classification scheme, modification takes place in the right part of the screen and is validated with the *Apply* button. For lots and objects, a page for editing opens (see the chapter relating to editing lots and objects).

*Add a class:* This action is available for both the classification scheme and for each of the classes if you have the appropriate permissions.

Note: You cannot create a class under an inactive class

*Delete*: This action is available for classes and for lots if you have the appropriate permissions. You must confirm the deletion by clicking on the *Delete* button.

*Permissions*: This action is available for the classification scheme and all classes to allow permission modification if you have the appropriate permissions.

*Move*: A class can be moved from one parent class to another (or to the root of the classification scheme). For this action, use the "drag and drop" feature:

1. Left click on the class to move.
2. Hold the button while moving the class.
3. Release the mouse button above the new parent class (or above the classification scheme) to validate the move.

Note: You cannot move a class from one classification scheme to another using the "drag and drop" feature.

## 2.2.5. Changing Classification Scheme Details

For the classification scheme, only the title and the description can be modified.

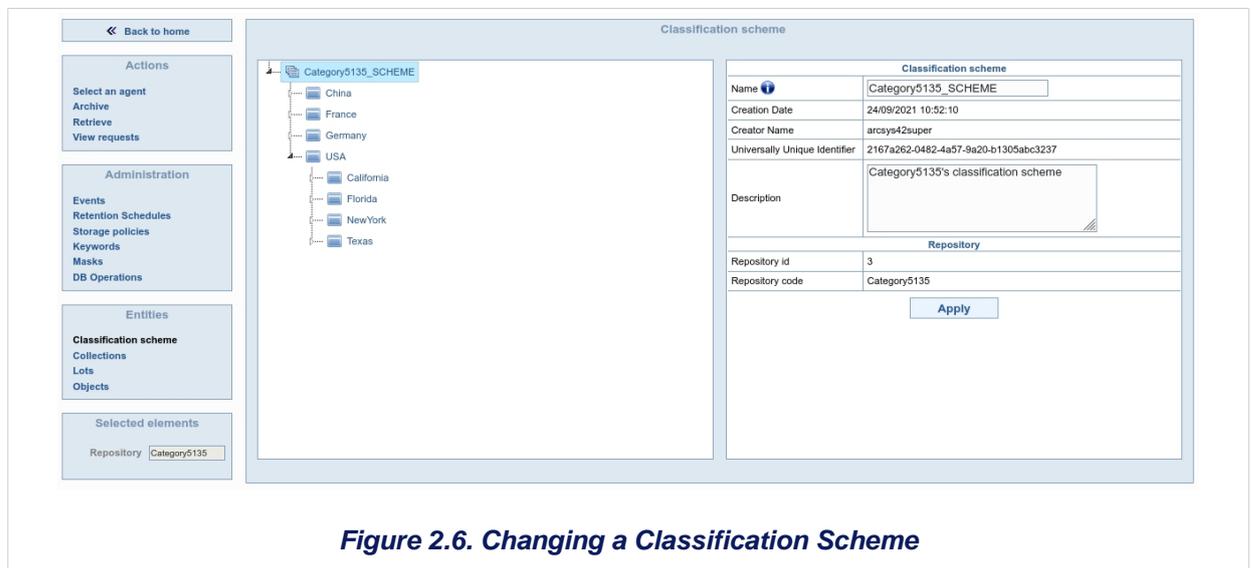


Figure 2.6. Changing a Classification Scheme

## 2.2.6. Editing the Details of a Class

You can change the status (active or inactive), description, comments of a class, as well as its retention schedule, its format policy, its indexing policy, its attestation policy and its workflow policy.

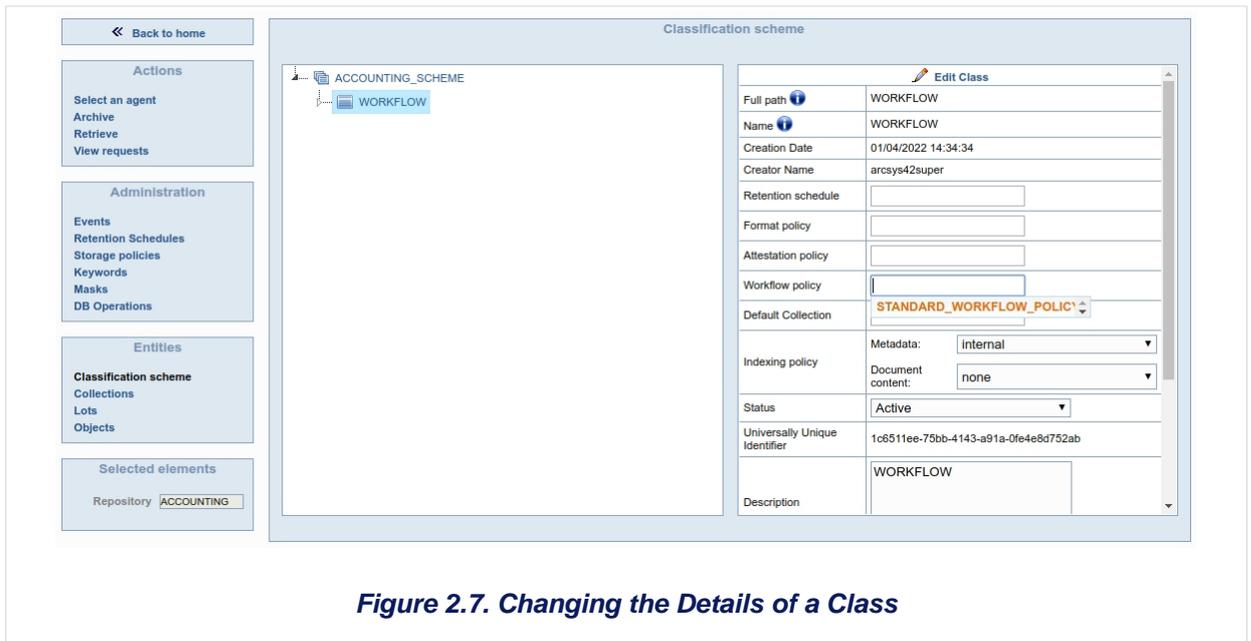


Figure 2.7. Changing the Details of a Class

## 2.2.7. Adding a Class

You can add a new class to a classification scheme or to a class. It is thus inserted as a child class of this element in the classification scheme. The title (access path to the class in the classification scheme), the UUID, the creation date, the status and the author are inserted automatically on class creation. You therefore only have to enter the subtitle, the description and the comments.

Click "OK" to confirm.

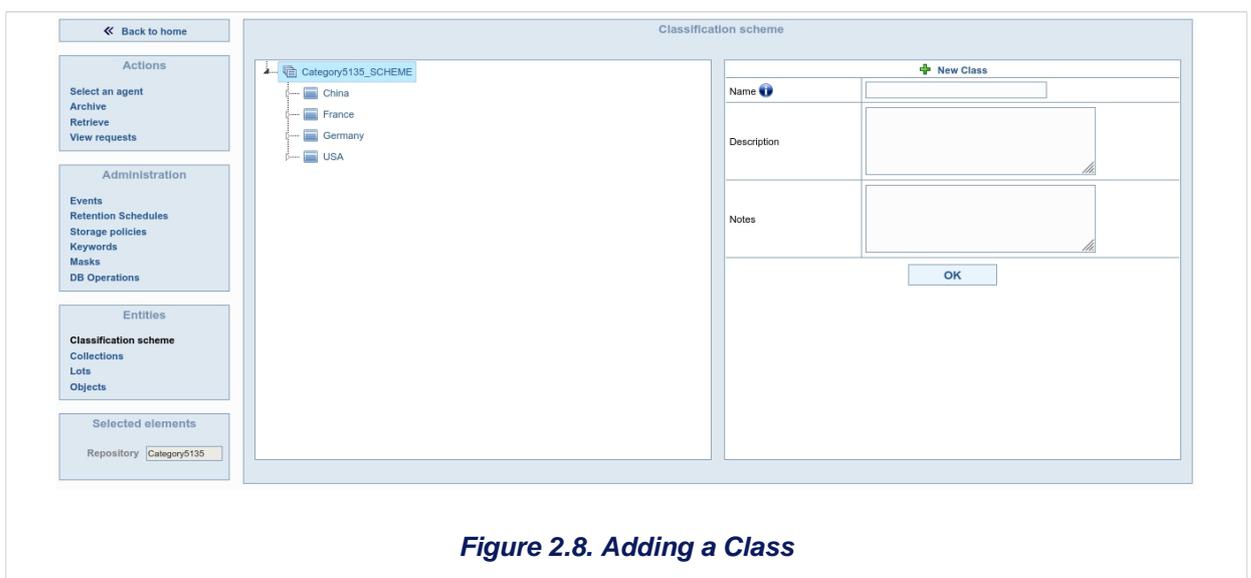


Figure 2.8. Adding a Class

## 2.2.8. Displaying/Editing Permissions

You can edit the permissions associated with a class. The principle is the same as that for managing repositories, collections and lot permissions.

Click **Apply** to confirm the changes in the permissions.

The *Default* button cancels all permission modifications that have not yet been validated.

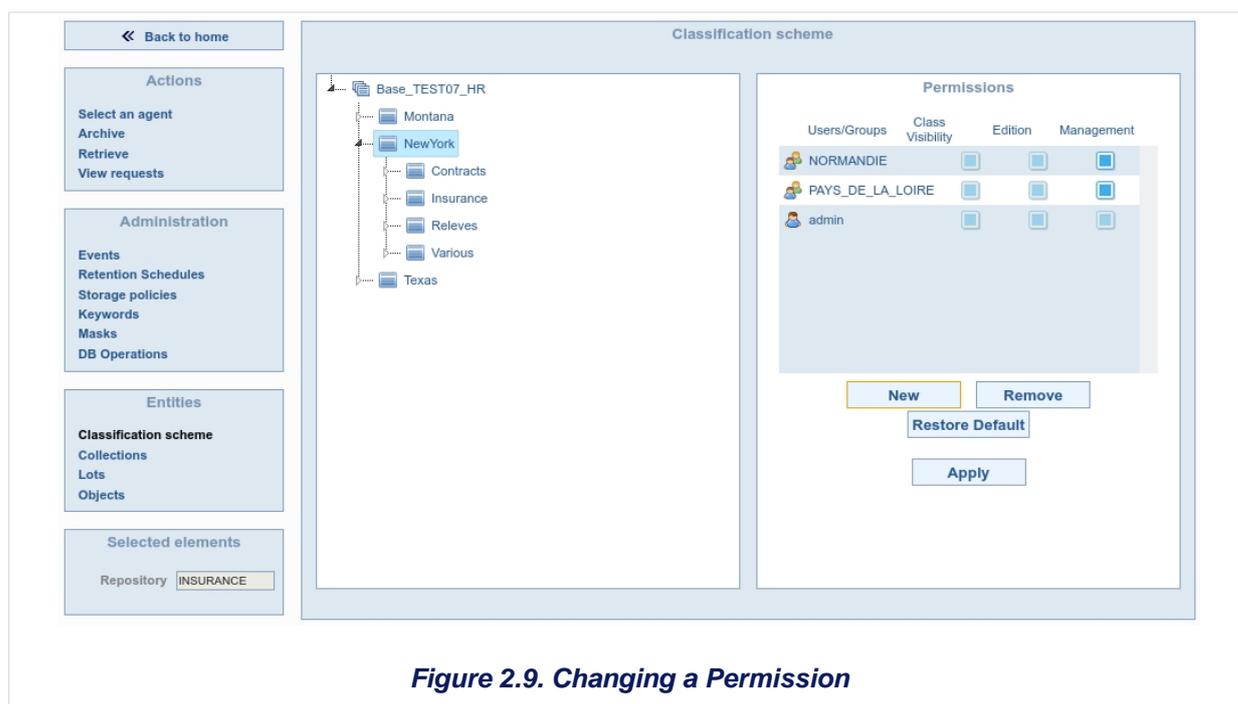


Figure 2.9. Changing a Permission

## 2.3. Managing and Selecting Collections

You can access the screens for managing collections from the **Collections** option in the main menu. To access this section, you must first select a repository.

This menu is used to:

- List and search existing collections
- Select a collection
- Create new collections
- Edit existing collections
- Export a collection in XML format

- Manage exports backed up on the server (downloads, imports, deletes)
- Import a collection in XML format using an external backup (upload)
- Delete collections

### 2.3.1. List

The following screen (Figure 2.10, “Collection List” [21]) lists the collections present in the selected repository. Only those collections for which the connected user has at least read rights are present.

Use the search bar to add filters for the collection names or IDs.



### 2.3.2. Selection

A number of Arcsys Web Agent functions require selection of a collection.

The collections that can be selected are represented by the icon . To select a collection, simply click on this icon. The collection then appears in the "Current selection" field.

### 2.3.3. Creation

The **New** button located at the top of the page provides access to the page for creating a new collection (Figure 2.11, “Creating a Collection” [22]).

However, before being able to create a new collection, you must select a mask (page 48, « Managing and Selecting Masks ») and a storage policy (page 68, « Managing and Selecting Storage Policies »). These elements are required to define a collection.

**Identification**

Name: AccountingFlorida

Label: Collection for Accounting in Florida

**Characteristics**

Storage policy: test

Mask: MA

Default class for the new lots: [ ]

Type: Archiving

Delete the objects after archiving: no

Generate the traces for this collection: no

External timestamp: no

**TAR Characteristics**

Max size of the TAR files: 100000 KiB

**Encryption Characteristics**

Encryption policy: [ ]

**Permissions**

Users/Groups	Collection Visibility	Archive preparation	Collection Management
arcsys42super	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Figure 2.11. Creating a Collection

- **Identification:** The code for this entity must be unique and must not include the following characters: ;, \, /, ", ' . The label of this entity must not include the following characters: ;, \, /, " (the ' character is authorized). All other UTF-8 characters in the code or label are authorized.
- **Storage policy and mask:** The storage policy and the mask that appear in the creation screen are those present in the current selection field.
- **Default class for new lots:** you can specify a default class that will be assigned to the new lots in the collection. This class can be characterized by a retention schedule and a format policy. This means you can automatically assign a retention schedule and a format policy to new lots of the collection.

- **Max size of .TAR files:** .TAR files are record files. This parameter defines a maximum size for these files, beyond which the records will be divided into several parts.



## Note

A single file will never be divided into several records. Thus, when archiving a file of 20 MB, the `fichier .TAR` record containing this file will be at least 20 MB. Only records containing more than one file can be divided up.

- **Trace:** You can generate functional traces by collection.

If this option is enabled, then `collection_<id collection>.log` trace files will be generated and then archived during the launch of the specific auto archiving client for traces.

- **Permissions:** You can precisely define the rights of other Arcsys users for a specific collection.

To do this, you can add users or groups to the repository and allocate **Collection Visibility**, **Archive Creation** or **Collection Management** rights to them.

The **Inherit** button adds all the users and groups with the **Base Visibility** right over the repository containing the collection to the list of permissions.

The *Add my groups* button adds all the groups of the current user account to the list of permissions.

The *Default* button cancels all permission modifications that have not yet been validated.

Refer to the [Arcsys Functional Description Manual](#) for all information on permissions applicable to a collection user.

- **Default permissions for new lots:** You can define a default permissions template for the new lots created in the collection (when a new lot is created in the collection, permissions for the lot will be initialized by default with this template).

To do this, you can add users or groups of the repository to which the collection belongs and allocate the **Lot Visibility**, **Archive**, **Retrieval**, **Download** or **Management** rights to them (there are no checks run on the consistency of this permissions template with respect to permissions allocated to the collection).

The *Default* button cancels all permission modifications that have not yet been validated.

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Refer to the [Arcsys Functional Description Manual](#) for all information on rights applicable to a lot user.

- **Saving:** After informing the fields and selecting the options, click the **Finish** button to create the collection in the Arcsys Database with the settings provided. Click on the **Cancel** button to return to the previous page, disregarding the data entered on the page.

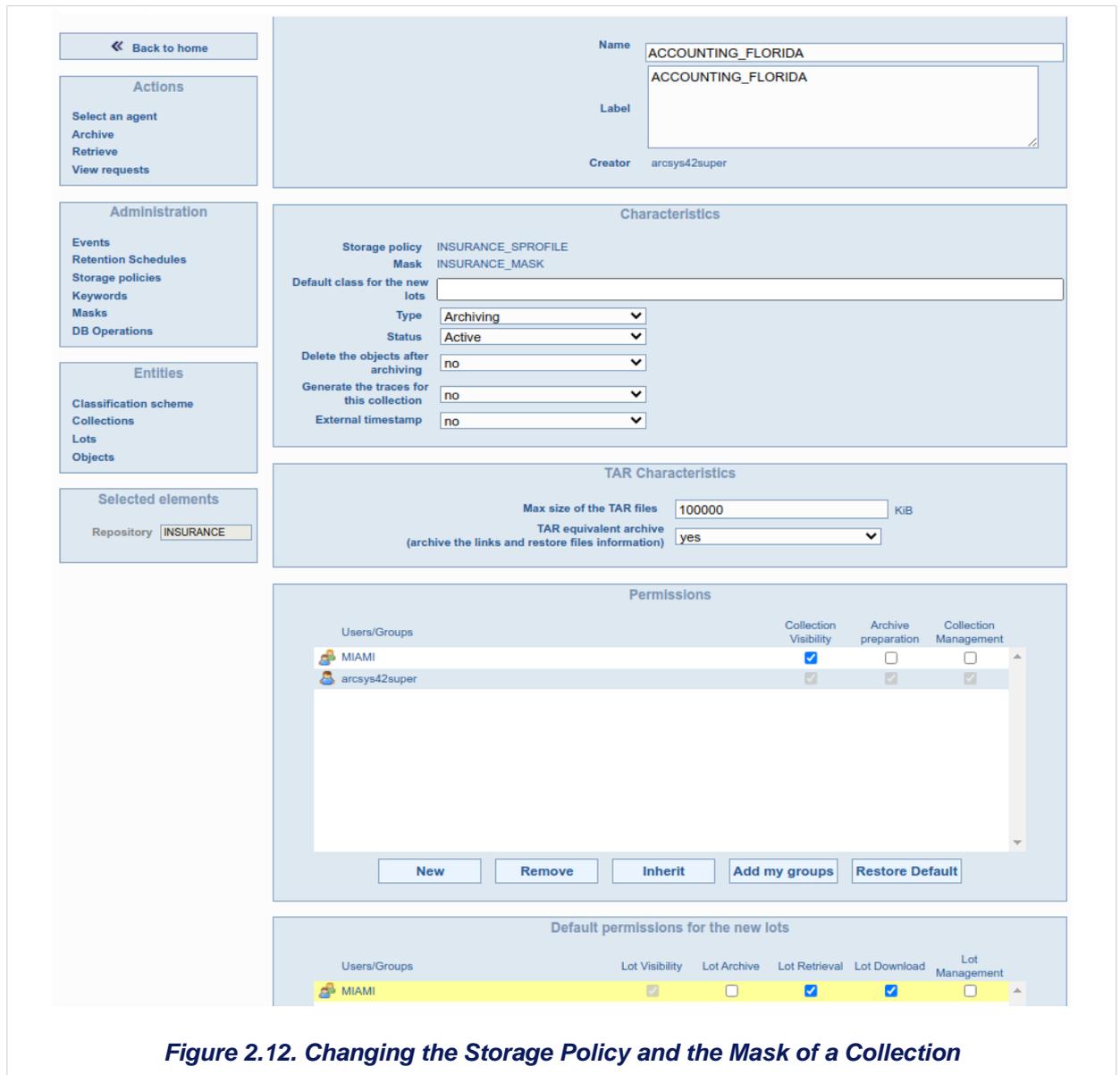
## 2.3.4. Edition or Display

You can access the edit page of an existing collection by clicking on the icon  of the collection to be edited in the list (Figure 2.10, “Collection List” [21]).

You can access the display page of an existing collection by clicking on the icon  of the collection to be viewed in the list (Figure 2.10, “Collection List” [21]).

The fields and functions shown on the edit screen for a collection are globally identical to those shown on the creation screen (Figure 2.11, “Creating a Collection” [22]).

## 2.3.5. Changing the Storage Policy and the Mask



**Figure 2.12. Changing the Storage Policy and the Mask of a Collection**

This screen (shown on the collection edit page) is used to easily change the storage policy and the mask of a collection.

This takes place in two steps:

- First select the new storage policy (page 68, « Managing and Selecting Storage Policies ») and/or the new mask (page 48, « Managing and Selecting Masks »).
- On the edit page of a collection, click on the button  to the right of the field to edit.

The name of the new storage policy or the new mask replaces the old one.

Once the fields and options are edited, the **OK** button saves the changes in the collection in the Arcsys Database. The **Cancel** button returns to the previous page, disregarding the corrections.

### 2.3.6. Deletion

For each of the collections over which the connected user has deletion rights, the icon  is enabled (Figure 2.10, “Collection List” [21]). Click on this button to display a confirmation window. The selected collection is then deleted from the Arcsys Database.



#### **Important**

**Deletion is only possible if no lot has been archived in that element or if all the lots of the collection have the "not archived" or "disposal" status.**

### 2.3.7. Export

In the folder specified by the *STOCK\_USERS\_REP* parameter of the Arcsys Web Agent the collection export exports in XML format:

- The collection with its details (code, label, etc.);
- The associated permissions (permissions for the collection and permissions concerning the lots) and their details (group, user, rights, etc.);
- The profile and the mask associated with the collection and their details (if the user wishes).

### 2.3.8. Managing Exports

Click the *Export Management* button to access the list of collections previously exported (see Figure 2.13, “Managing Collection Exports” [27]), and then:

- Download the collection in XML format via the *Zoom* button;
- Import the collection in the current repository via the *Import from XML* button (the import will not take place if there is a conflict at code level). If the storage policy and/or the mask associated with the collection does not exist in the current repository, a list of exports that may correspond will be suggested for import before continuing.
- Delete the collection export via the *Trash bin* button (deletion is not possible if the collection export results from the export of an existing repository).

Date of export	Collection code	Action	Collection label	From repository with code
01/10/2021 12:15:16	BankStatements		Bank Statements	Screenshot
01/10/2021 12:15:09	BankStatements		Bank Statements	Screenshot
01/10/2021 12:15:09	ACCOUNTING_FLORIDA		ACCOUNTING_FLORIDA	Screenshot
01/10/2021 12:15:08	ARCSYSL-10936		afp de plus de 2Go	AFP
01/10/2021 12:15:07	LogDefault		Log Default Collection	AdminBase
01/10/2021 12:15:03	LogDefault		Log Default Collection	AdminBase
01/10/2021 12:14:56	FS_BIS		test du forward de demande d'archivage	Test
01/10/2021 12:14:41	ARCSYSL-10936		afp de plus de 2Go	AFP
01/10/2021 12:13:04	BankStatements		Bank Statements	Screenshot
01/10/2021 11:56:39	ACCOUNTING_FLORIDA		ACCOUNTING_FLORIDA	Screenshot

**Figure 2.13. Managing Collection Exports**

### 2.3.9. Import

The *Import from XML* button imports a collection via an external XML file. If the associated storage policy and/or the mask does not exist in the current repository, a list of corresponding exports will be suggested for import before continuing.

## 2.4. Managing and Selecting Lots

You can access the screens for managing lots from the **Lots** option in the main menu. To access this menu, you must have selected a repository and a collection.

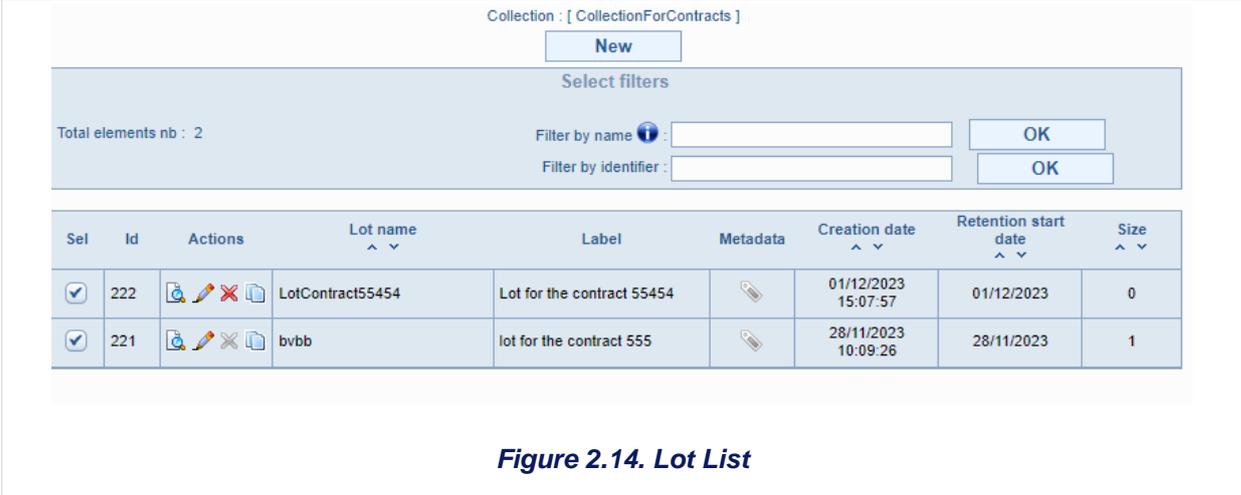
This menu is used to:

- List and search existing lots
- Select a lot
- Create new lots
- Edit existing lots
- Manage the metadata associated with a lot
- Delete lots

## 2.4.1. List

The following screen (Figure 2.14, “Lot List” [28]) lists the lots for the selected collection. Only those lots for which the connected user has read rights at least are shown.

Use the search bar to add filters for lot names or IDs.



Collection	[ CollectionForContracts ]							
<input type="button" value="New"/>								
Select filters								
Total elements nb : 2		Filter by name 				<input type="button" value="OK"/>		
		Filter by identifier :				<input type="button" value="OK"/>		
Sel	Id	Actions	Lot name	Label	Metadata	Creation date	Retention start date	Size
<input checked="" type="checkbox"/>	222	  	LotContract55454	Lot for the contract 55454		01/12/2023 15:07:57	01/12/2023	0
<input checked="" type="checkbox"/>	221	  	bvbb	lot for the contract 555		28/11/2023 10:09:26	28/11/2023	1

**Figure 2.14. Lot List**

## 2.4.2. Selection

A lot must be selected so it can be used on other pages of the interface.

The lots that can be selected are represented by the icon . To select a lot, simply click on this icon. The lot then appears in the "Current selection" field (see Figure 2.14, “Lot List” [28]).

## 2.4.3. Creation

The **New** button located at the top of the page provides access to the page for creating a new lot (Figure 2.15, “Creating a Lot” [29]).

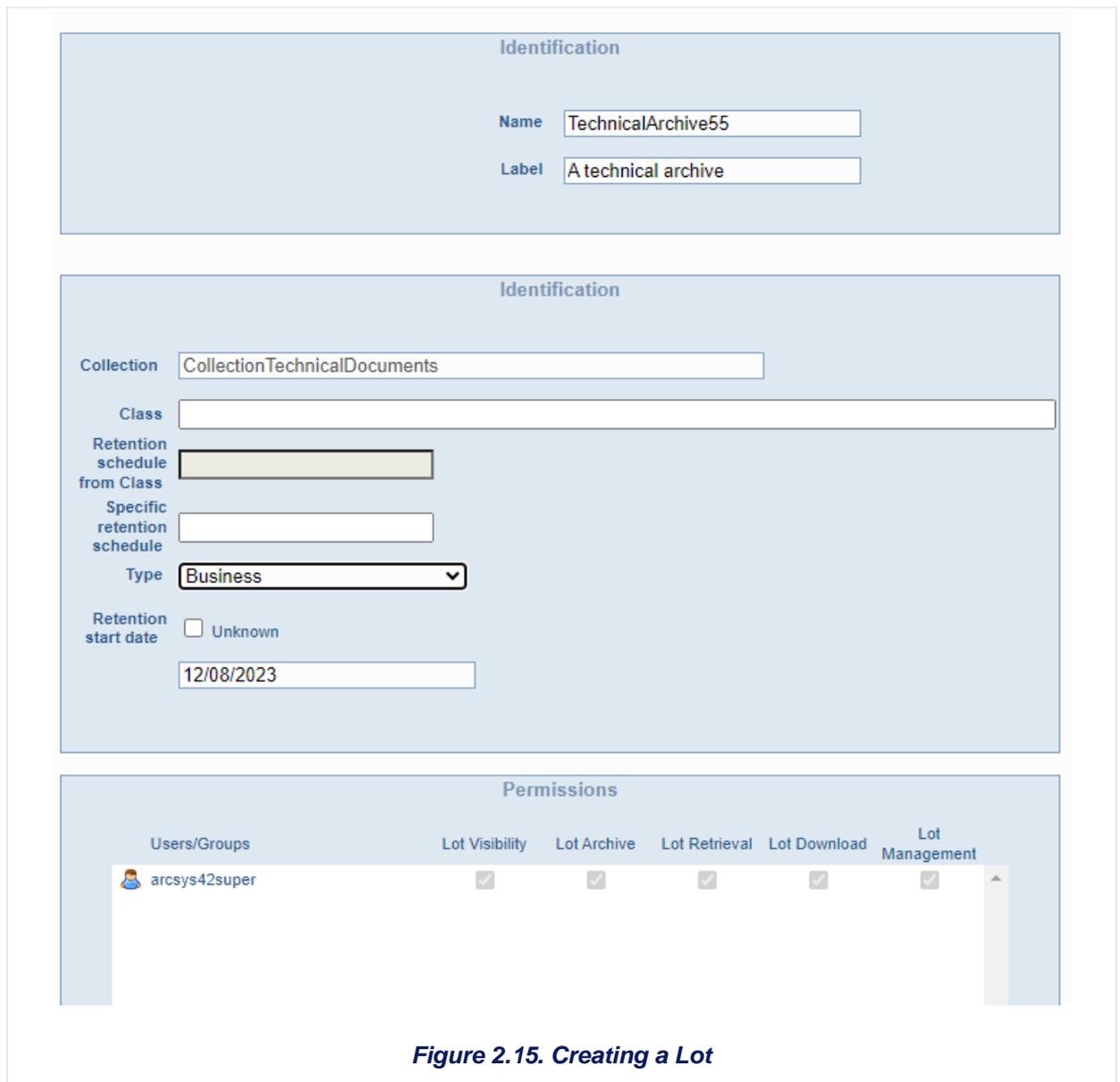


Figure 2.15. Creating a Lot

- **Identification:** The code for this entity must be unique and must not include the following characters: ;, \, /, ", '. The label of this entity must not include the following characters: ;, \, /, " (the ' character is authorized). All other UTF-8 characters in the code or label are authorized.
- **Collection:** The collection that appears is that present in the current selection field.
- **Retention start date:** Lot retention starts at a specific date. You can specify this date when creating the lot. It is also possible to have an unknown date; simply check the "unknown" box.
- **Permissions:** You can precisely define the rights of other Arcsys users for a specific lot.

To do this, you can add users or groups from the collection to which the lot belongs and allocate **Lot Visibility**, **Archive**, **Restore**, **Download** or **Management** rights to them.

The **Inherit** button adds all the users and groups with the **Collection Visibility** right for the collection containing the lot to the list of permissions.

The *Add my groups* button adds all the groups of the current user account to the list of permissions.

The *Default* button cancels all permission modifications that have not yet been validated.

Refer to the [Arcsys Functional Description Manual](#) for all information on rights applicable to a lot user.

- **Saving**: After informing the fields, click **OK** to create the lot in the Arcsys Database with the populated settings. Click on the **Cancel** button to return to the previous page, disregarding the data entered on the page.

## 2.4.4. Editing or Displaying

For each lot that can be edited, the icon  is enabled (Figure 2.14, “Lot List” [28]). Click on this button to access the edit page for a lot.



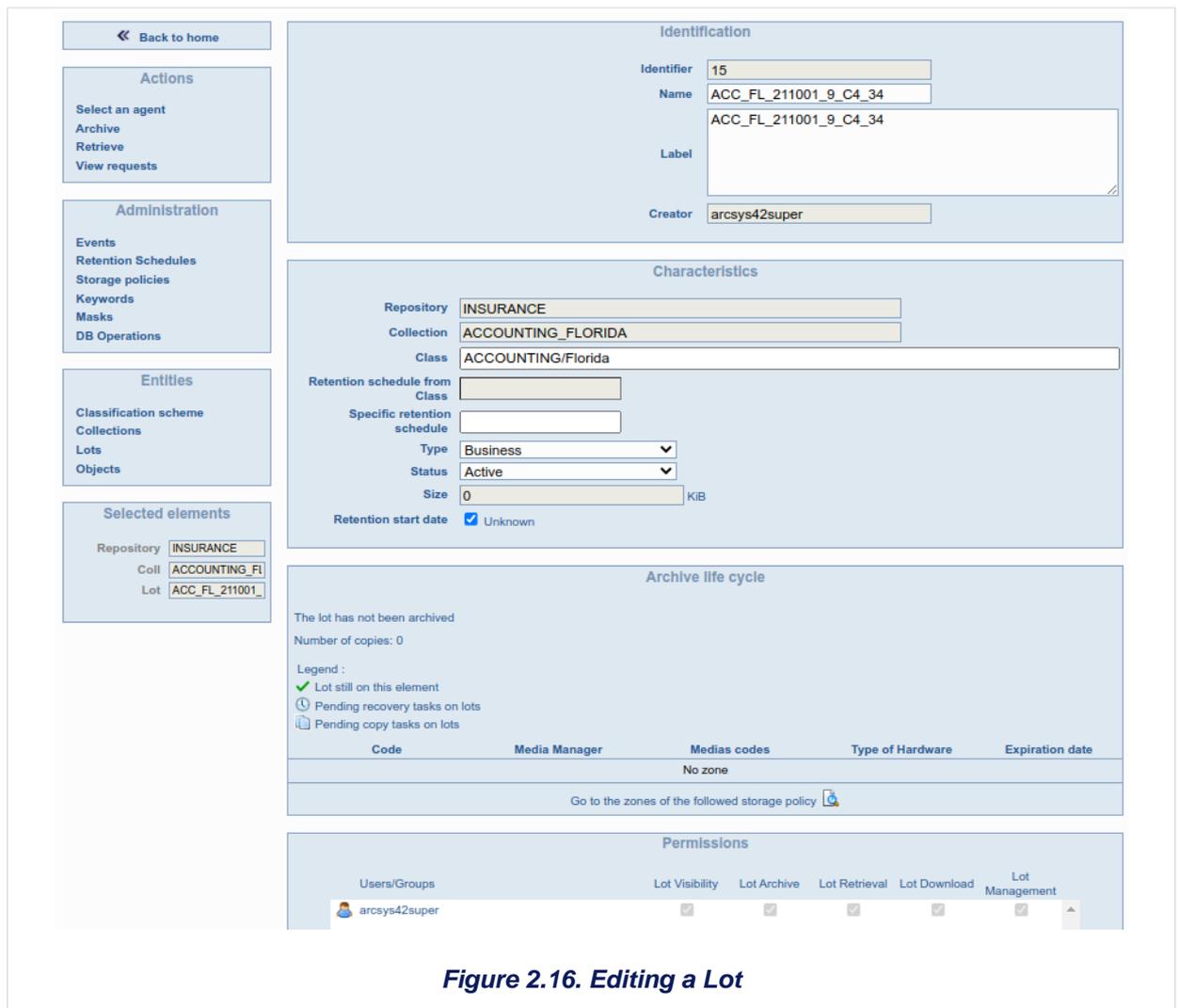
### Note

The lot can only be edited if it is not archived, or in the end-user interface.

The modification of archived lot in the administration interface of the Arcsys Web Agent can be activated by setting the `KEEP_DEPRECATED_LOT_MODIFICATION_SCREEN` parameter to `true`. See [Arcsys Administration Manual](#) for more information.

You can access the display page of an existing lot by clicking on the icon  of the lot to display in the list.

The fields and functions shown on the edit screen for a lot are globally identical to those shown on the creation screen (Figure 2.15, “Creating a Lot” [29]).



**Figure 2.16. Editing a Lot**

- **Lot type:** There are two types of lots: "Business" lots and "trace" lots. Trace lots are lots created by the auto archiving client for traces by collection. (The lot type is not modifiable)
- **Lot size:** Once archived, the exact size of a lot is determined and it is moved to the relational database. It is displayed in the lot edit screen, represented on the Figure 2.16, "Editing a Lot" [31].
- **Retention start date:** The retention start date can be edited.
- **Archiving zone:** When a lot is archived in special zones (other than the retention zone), its related data appears in the lot edit screen. This table is automatically modified when a lot is migrated from one zone to another (depending on the storage policy defined).
- **Record life cycle:** This tab lists the different zones in which the lot is present (zones preceded by the icon) and also zones in which it is pending recovery (zones

preceded by the  icon) and the zones to which it is to migrate. For a lot archived on ArcMover, the list of file systems or tapes on which the lot(s) is present is also specified.

The **Record expiration date** field corresponds to the date from which Arcsys no longer guarantees access to it. If this field is undetermined, Arcsys guarantees its recovery for the moment, but does not determine the date at which the record will reach its scheduled end of retention date (because the retention start date has not yet been specified).

The **Number of copies** field represents the number of copies Arcsys has made of the original record.

- **Disposal holds** (display screen for the lot only): This tab presents the list of disposal holds active on the lot. The table contains the code, the author, the reason and the creation date for each disposal hold.

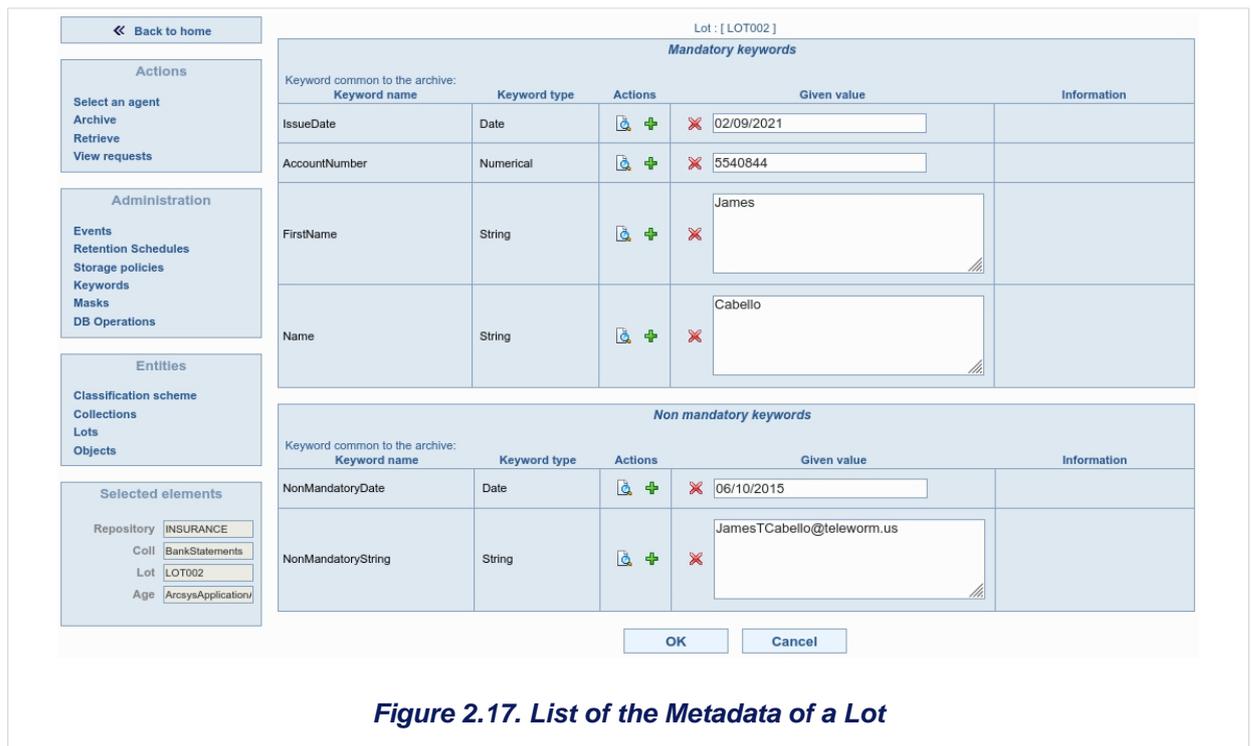
If no disposal hold is active on the lot, this tab is not displayed.

This tab is only present in the display screen, because a lot cannot be modified if it includes a disposal hold.

## 2.4.5. Managing Metadata

You can associate one or more "Lot"-level metadata items for business lots to each keyword of the lot (association of keywords and values – see [glossary](#)).

On the lot list screen (Figure 2.14, "Lot List" [28]), click on the icon  ("Metadata" column) for the lot to modify. The Figure 2.17, "List of the Metadata of a Lot" [33] screen appears; you can add/delete/change metadata.



## Important

**You cannot edit, create or delete metadata if the lot is subject to one or more disposal holds.**

To edit a metadata value, in the metadata list screen for a lot (Figure 2.17, “List of the Metadata of a Lot” [33]), click on the value to edit.



## Note

The list of previous metadata values in the history tab of this keyword appears.

To delete metadata previously added to a lot, simply click on the icon (Figure 2.17, “List of the Metadata of a Lot” [33]). A confirmation message then appears and the metadata item is deleted.

## 2.4.6. Deletion

For each lot that can be deleted, the icon is enabled (Figure 2.14, “Lot List” [28]). Click on this button to display a confirmation window. The selected lot is deleted logically from the Arcsys Database.

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## 2.4.7. Copy

For each lot that can be copied, the icon  is enabled. Click this button to trigger the logical copy of the lot. The lot and all its linked entities (objects, metadata, classification scheme, permissions) are copied **logically** (if the lot copied is archived, there is no physical copy of the lot, only its definition).

## 2.4.8. Classification

Lots can be classified during creation and their classification can be changed once they have been created.

During lot creation, you can choose a class and associate it with the lot being created or modified. Inversely, you can disassociate the class from the lot.

The list of available classes is composed of class leaf nodes present in the classification scheme of the repository associated with the lot being created/edited.

Only users with the appropriate rights can edit the classification of a lot.

**An object cannot be associated with an inactive class.**

## 2.5. Managing Objects

You can access the screens for managing objects from the **Objects** option in the main menu. To access this menu, you must first select a repository, a collection and a lot.

This menu is used to:

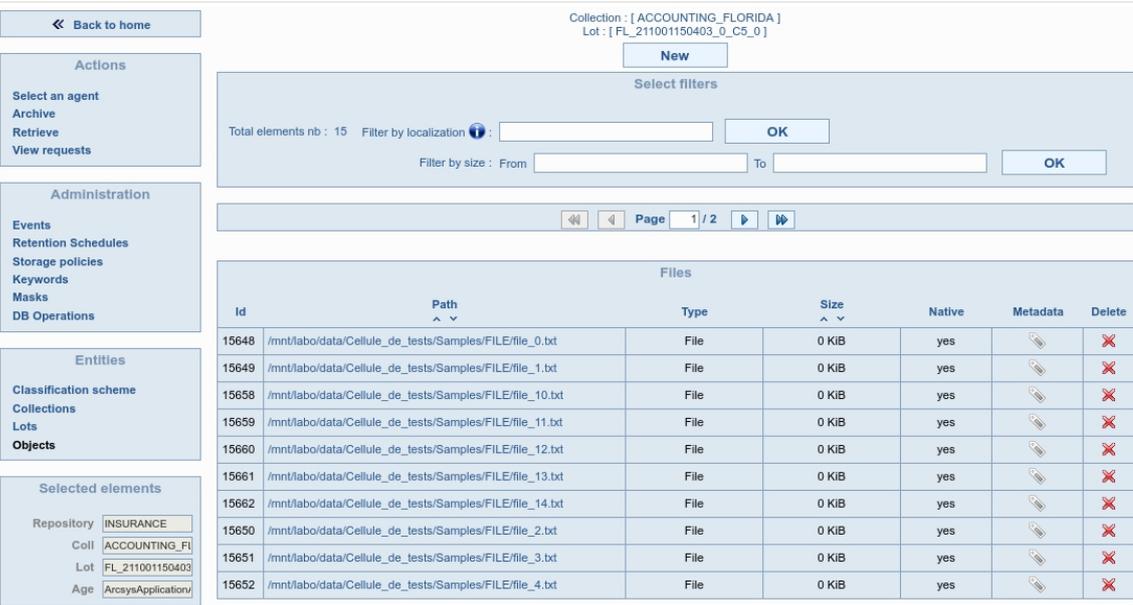
- List and search objects in a lot
- Manage the metadata associated with an object
- Create a new object
- Edit an existing object
- Delete an object

### 2.5.1. List

The following screen (Figure 2.18, “Object List” [35]) lists the objects belonging to the selected lot. The search bar is used to add filters for location (for example, file location) or the size of objects (in kilobytes).

This screen contains:

- "Directory" objects: These are directories (or a set of directory files) physically present on the target machine; when they are successfully archived, their component files are displayed.
- "File" objects: These are the files physically present on the target machine.
- "Native file" objects (ArcAFP Option, ArcPAK Option): These are object container files, physically present on the target machine. A format handler is required for analysis.



Collection : [ ACCOUNTING\_FLORIDA ]  
Lot : [ FL\_211001150403\_0\_C5\_0 ]

Actions: Select an agent, Archive, Retrieve, View requests

Administration: Events, Retention Schedules, Storage policies, Keywords, Masks, DB Operations

Entitles: Classification scheme, Collections, Lots, Objects

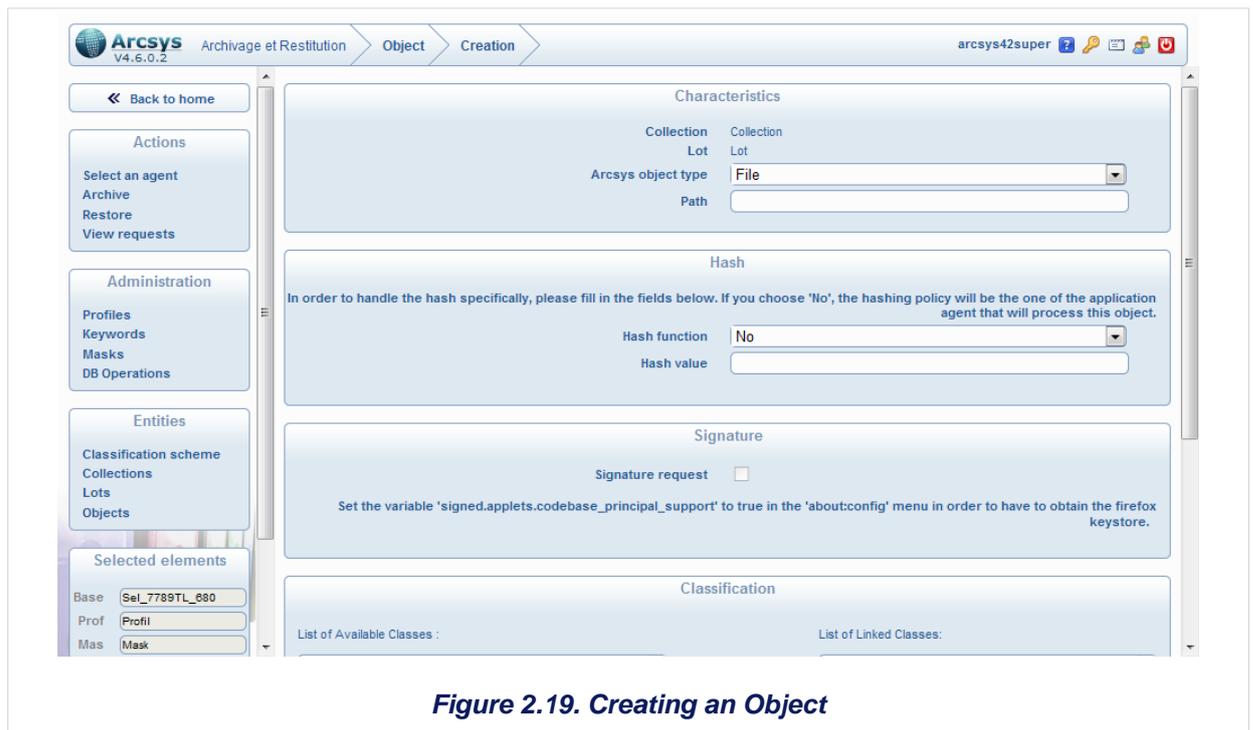
Selected elements: Repository: INSURANCE, Coll: ACCOUNTING\_FL, Lot: FL\_211001150403, Age: ArcsysApplication

Files						
Id	Path	Type	Size	Native	Metadata	Delete
15648	/mnt/labo/data/Cellule_de_tests/Samples/FILE/file_0.txt	File	0 KIB	yes		
15649	/mnt/labo/data/Cellule_de_tests/Samples/FILE/file_1.txt	File	0 KIB	yes		
15658	/mnt/labo/data/Cellule_de_tests/Samples/FILE/file_10.txt	File	0 KIB	yes		
15659	/mnt/labo/data/Cellule_de_tests/Samples/FILE/file_11.txt	File	0 KIB	yes		
15660	/mnt/labo/data/Cellule_de_tests/Samples/FILE/file_12.txt	File	0 KIB	yes		
15661	/mnt/labo/data/Cellule_de_tests/Samples/FILE/file_13.txt	File	0 KIB	yes		
15662	/mnt/labo/data/Cellule_de_tests/Samples/FILE/file_14.txt	File	0 KIB	yes		
15650	/mnt/labo/data/Cellule_de_tests/Samples/FILE/file_2.txt	File	0 KIB	yes		
15651	/mnt/labo/data/Cellule_de_tests/Samples/FILE/file_3.txt	File	0 KIB	yes		
15652	/mnt/labo/data/Cellule_de_tests/Samples/FILE/file_4.txt	File	0 KIB	yes		

**Figure 2.18. Object List**

## 2.5.2. Creation

The **New** button located at the top of the page provides access to the page for creating a new object (Figure 2.19, "Creating an Object" [36]).



**Figure 2.19. Creating an Object**

- **Collection and lot:** The collection and the lot that appear in the creation screen are those present in the current selection field. The objects created will thus be part of the selected lot, with the rules defined in the selected collection.
- **Type:** This field is used to select the type of object to create. The type of objects managed are "File", "Directory" and "Native File" objects.
- **Native file type** (ArcAFP Option): This field appears only if the "Native file" object type is selected and allows selection of native file objects. This is mandatory for a "Native file" object.
- **Format** (ArcAFP Option): This field appears only if the "Native file" object type is selected and is used to select a native file format. The format matches the format handler file name (XML file), which must be stored at archiving Arcsys Engine level (see [Arcsys Administration Manual](#)).
- **File location:** Use this field to enter the path and full name to access the file or directory to archive. It is mandatory for an object of the type:
  - File
  - Directory
  - Native file
  - MVS sequential file
  - Group of sequential files

- VSAM file (see the *following section*)

For a "Directory" object, you can specify either a directory in the real sense of the term (for example, /home/user1) or a set of files using wildcards (POSIX standard, for example /home/user1/\*.log). For QSAM MVS files, use the MVS specific format (e.g. USER.PROD.DATA) is used.



## Note

*The files to archive must be located on a target machine (see the architecture schema in the Arcsys Presentation Manual ).*

- *File location* ("VSAM file"): For VSAM datasets, do not specify the name of the dataset; instead you must provide the location of a configuration file whose structure is defined below. This file must be located in an HFS file (e.g. /usr/m\_kh/ksds.cfg).
- *Configuration file structure* ("VSAM file"): For a KSDS, archiving and retrieval does not take place on the entire dataset, but rather on some of its records. This is why it is more like database archiving than file archiving. Archiving takes place on a selection of records. Sorting is based on a key that does not necessarily match the "primary" key of the record, defined by an offset and a length in the record.

Thus a minimum and maximum value for this key is defined and a sort type is informed that matches the comparison type used to sort (numeric, character string or date).

This information is currently contained in a configuration file that is passed as the name of a file to archive — unlike other file types. This file has the following structure:

```
NAME=<vsam cluster name > START_KEY=<key start value> END_KEY=<key end value> REC_LEN=
<record length> KEY_OFF=<key offset> KEY_LEN=<key length> KEY_TYPE=<key type> KEY_FORMAT=
<key format>
```

For an ESDS or an RRDS, archiving and retrieval takes place on the entire data set; therefore no filtering is applied. The configuration file therefore has the following structure:

```
NAME=<name of VSAM cluster> REC_LEN=<record length>
```

*Detailed explanation of the parameters:*

**NAME:** References the full name of the VSAM cluster in which the archiving selects the records.

**START\_KEY** and **END\_KEY**: Designates the minimum and maximum values of the key, respectively, for the records to archive.

**REC\_LEN**: Maximum length of a record.

**KEY\_OFF**: Designates the offset of the key, i.e. the index of the key in the record. It starts with 0 for the first byte.

**KEY\_LEN**: Length of the key.

**KEY\_TYPE**: Designates the type of comparison to use for the sort. Three values are possible: NUMERICAL, CHARACTER or DATE.

- If the type is NUMERICAL, key comparison takes place on the value of the remainder of the key byte. Comparison takes place on whole unsigned numbers in big endian.
- If the type is CHARACTER, comparison takes place on the lexicographic value of the string, i.e. the characters are compared from left to right until a difference is found.
- If the type is DATE, the KEY\_FORMAT pattern is used which defines the format and the date. For each date value, it applies the pattern and you can thus compare it with the START\_KEY and END\_KEY values that must also comply with this pattern.

**KEY\_FORMAT** defines the pattern to use in the event of a DATE type key. Possible characters are:

<i>Letter</i>	<i>Definition</i>	<i>Example</i>	
D	Day	DD	13 -> the 13th of the month
M	Month	MM	05 -> the month of May
Y	Year	YYYY	1985 -> year 1985
H	Hour	HH	15 -> 3 pm
m	Minute	mm	25 -> 25 minutes
S	Second	SS	36 -> 36 seconds

- **Hash function and hash value**: The fixity of each of the archived objects is checked by a hash function and a hash value defined for each object. This hash can either be calculated automatically by the Arcsys Application Agent when the object is archived or entered manually by the user who creates the object in the relational database.

To allow the archiving agent to calculate the hash value with the hashing function defined by default, you should leave these two fields blank. If the hash value is already determined at the time of object creation, you can enter it in this screen.

- **Saving:** After informing the fields and selecting the options, click **OK** to create the object in the Arcsys Database with the settings provided. Click on the **Cancel** button to return to the previous page, disregarding the data entered on the page.

## 2.5.3. Edition

You can access the edit page for an existing object by clicking on the location of the object ("file", "directory" or "Native file" type) or on the command group ("database" type).

The fields and functions shown on the edit screen for an object are globally identical to those shown on the creation screen (Figure 2.19, "Creating an Object" [36]). Certain information on the file is informed on archiving the lot. Therefore, if the lot was archived, it is possible to have the following type of information: file type (regular file, link, special character file directory, special FIFO or special block), date of last edit, date of last access, date of last status change, rights, UID and GID (Figure 2.20, "Editing an Object" [39])

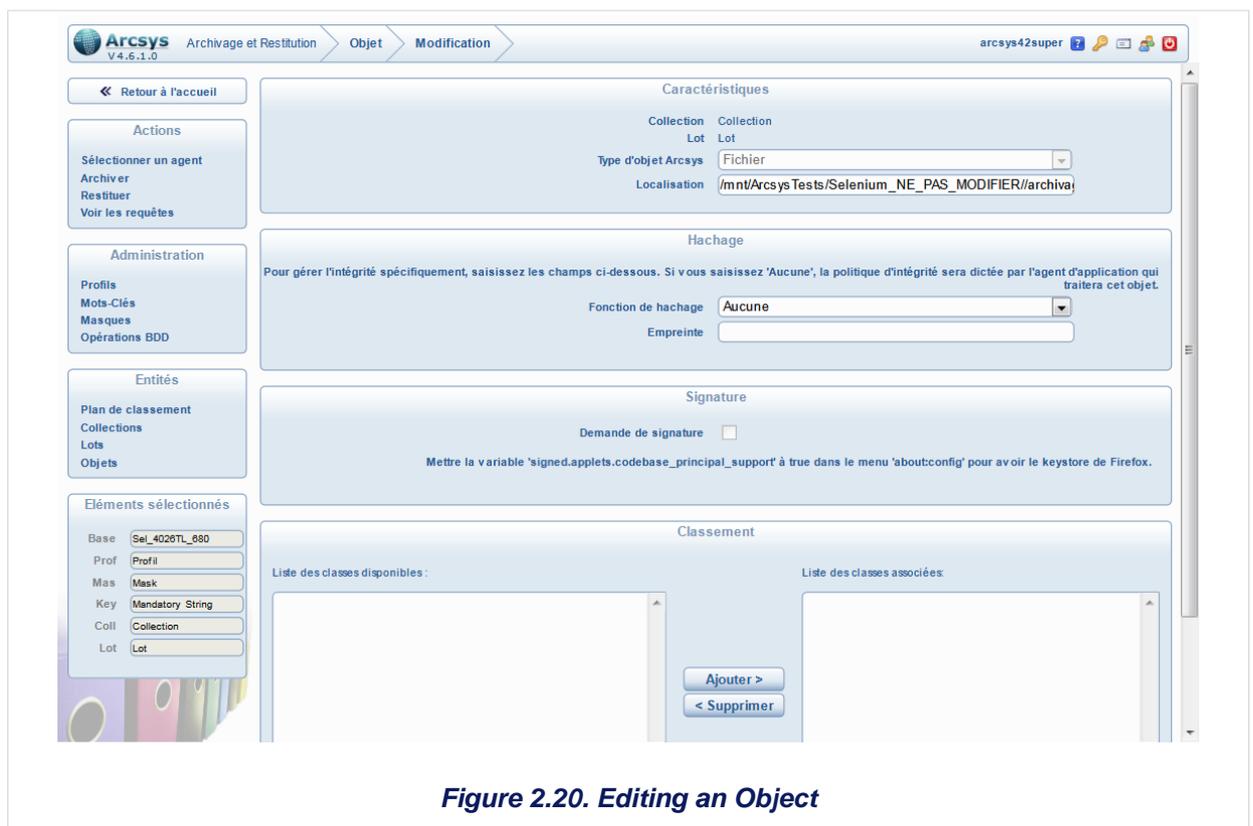
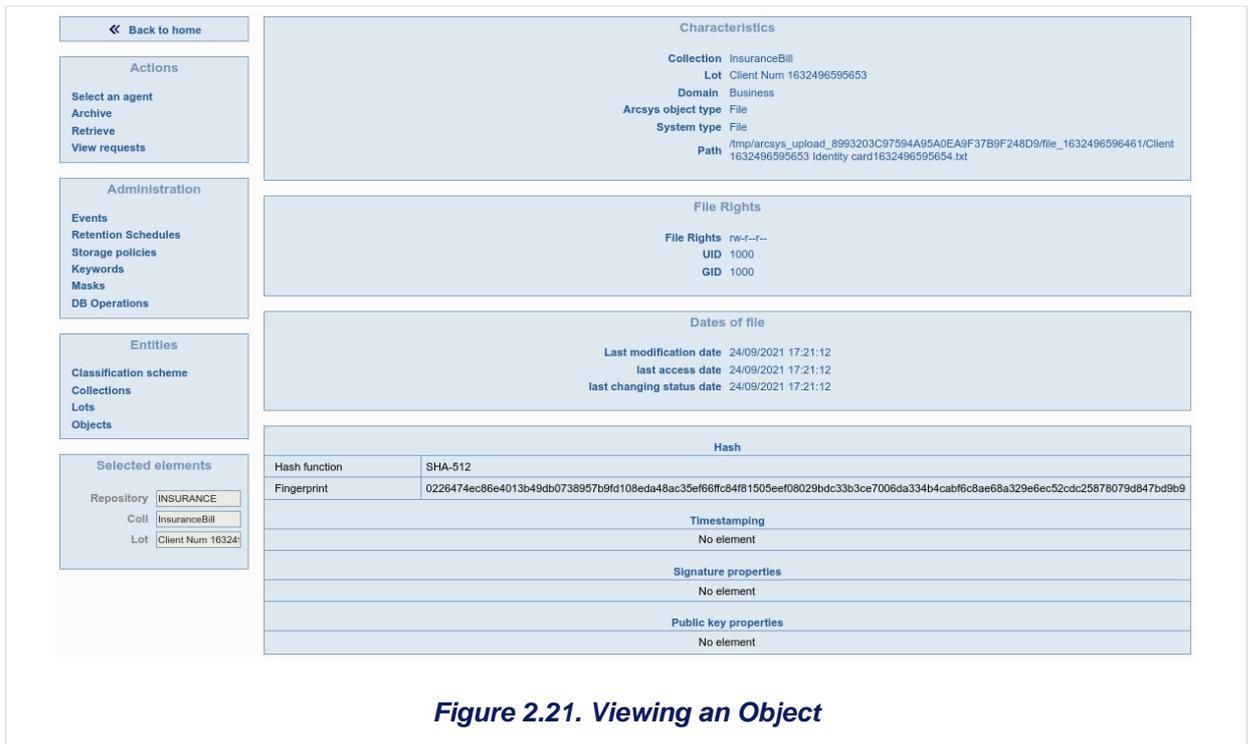


Figure 2.20. Editing an Object



**Figure 2.21. Viewing an Object**

## 2.5.4. Managing Metadata

In the same way as for a lot, you can associate several metadata items at "object" level to each keyword (association of keywords and values – see [glossary](#)).

This management is identical to that of lot metadata management (see [Managing and Selecting Lots page 27](#)). Thus, to access metadata at Object level, on the object list screen (Figure 2.18, "Object List" [35]), click on the icon ("Metadata" column) for the object to modify.

## 2.5.5. Deletion

For each object that can be deleted, the icon  is enabled (Figure 2.18, "Object List" [35]). Click on this button to display a confirmation window. If the object belongs to a lot that is not archived, it will be deleted from the Arcsys Database, otherwise it will be flagged as deleted in the Arcsys Database and will not be retrievable

## 2.6. Managing Public Keys

You can access the various screens for managing objects by selecting **Public Key** from the main menu.

This menu:

- Lists and searches the public keys used by signature
- Displays the detail of these public keys

## 2.6.1. List

The following screen (Figure 2.22, “List of Public Keys” [41]) lists the public keys used by at least one signature for an object. Use the search bar to add filters for the identifiers.

This screen lists the main information for public keys (creator, algorithm, validity date, etc.).

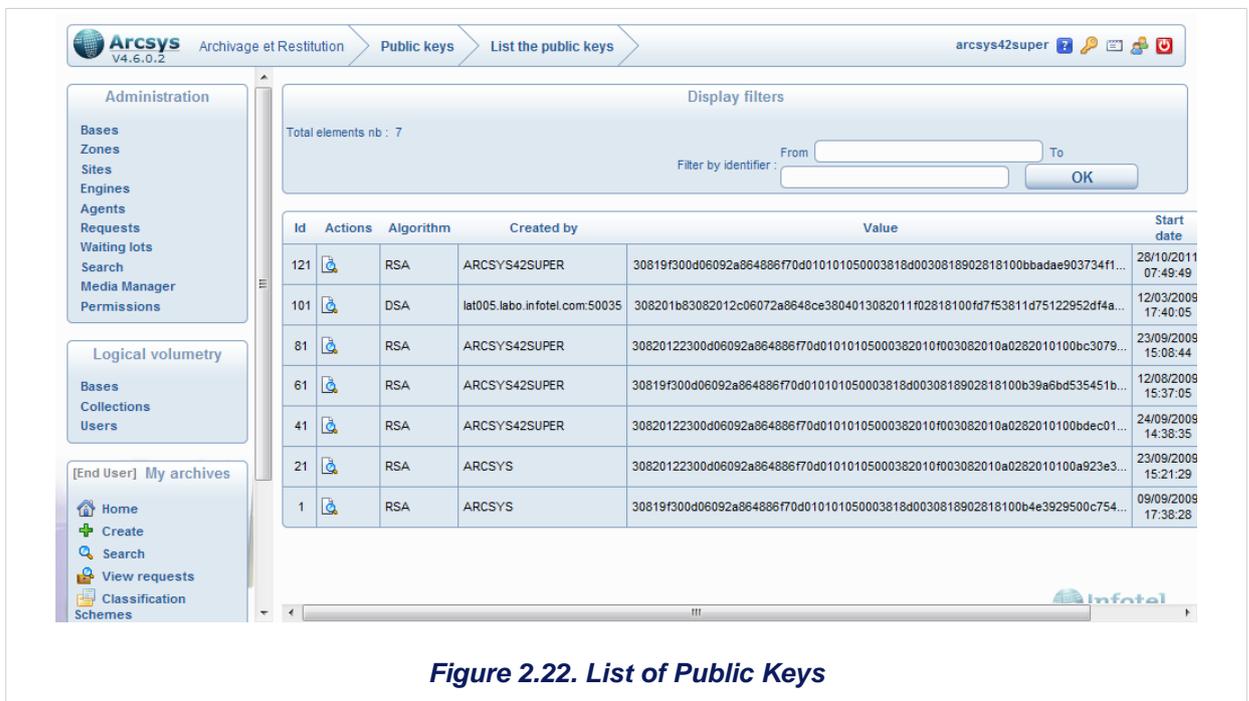


Figure 2.22. List of Public Keys

## 2.6.2. Display

The display screen shows information on the issuer and owner of the selected public key.

## 3. Indexing

### 3.1. Managing and Selecting Keywords

You can access the various screens for managing keywords by selecting **Keywords** from the main menu. To access this section, you must first select a repository.

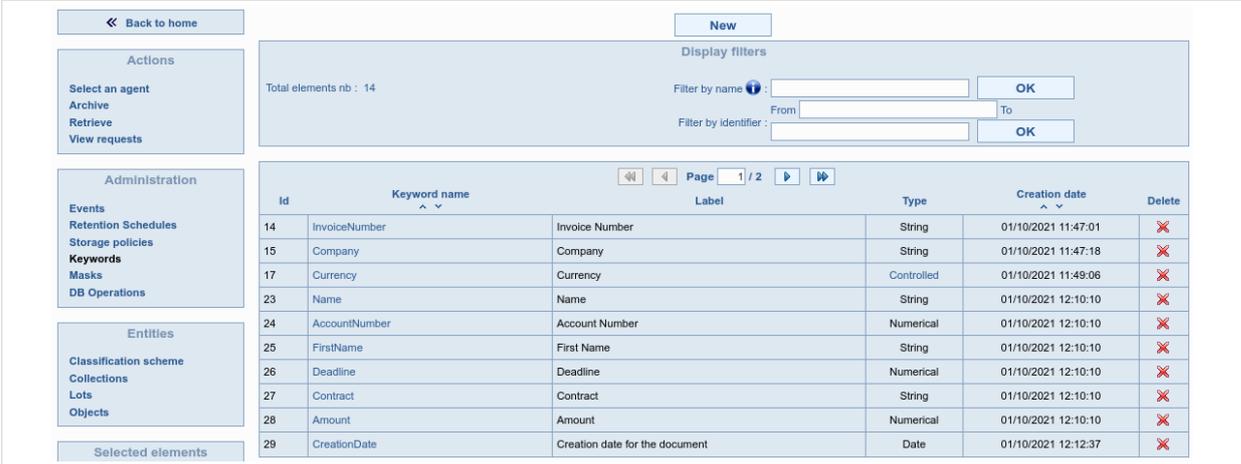
This menu is used to:

- List and search existing keywords
- Create a new keyword
- Change an existing keyword
- Manage the controlled types of keywords
- Delete keywords

#### 3.1.1. List

The following screen (Figure 3.1, “Keyword List” [42]) lists the keywords present in the selected repository.

Use the search bar to add filters for the keyword names or IDs.



The screenshot shows the 'Keyword List' interface. It includes a navigation bar with 'Back to home' and 'New' buttons. A sidebar on the left contains menu items like 'Actions', 'Administration', and 'Entities'. The main area features a search bar with 'Filter by name' and 'Filter by identifier' options. Below the search bar is a table with the following data:

Id	Keyword name	Label	Type	Creation date	Delete
14	InvoiceNumber	Invoice Number	String	01/10/2021 11:47:01	✖
15	Company	Company	String	01/10/2021 11:47:18	✖
17	Currency	Currency	Controlled	01/10/2021 11:49:06	✖
23	Name	Name	String	01/10/2021 12:10:10	✖
24	AccountNumber	Account Number	Numerical	01/10/2021 12:10:10	✖
25	FirstName	First Name	String	01/10/2021 12:10:10	✖
26	Deadline	Deadline	Numerical	01/10/2021 12:10:10	✖
27	Contract	Contract	String	01/10/2021 12:10:10	✖
28	Amount	Amount	Numerical	01/10/2021 12:10:10	✖
29	CreationDate	Creation date for the document	Date	01/10/2021 12:12:37	✖

Figure 3.1. Keyword List

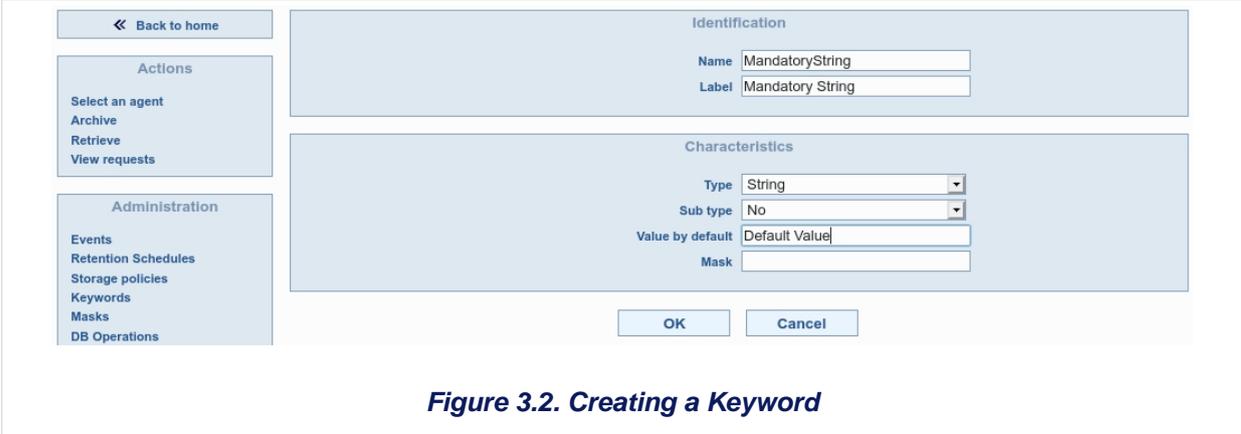
#### 3.1.2. Selection

Associating keywords with a mask takes place in the mask interface (associated keywords). First of all, the interface displays the keywords already associated with

this mask. Then to associate new keywords, select the *Add keyword* button. Finally, a table containing all the keywords available appears so that you can select them. (see Figure 3.1, “Keyword List” [42]).

### 3.1.3. Creation

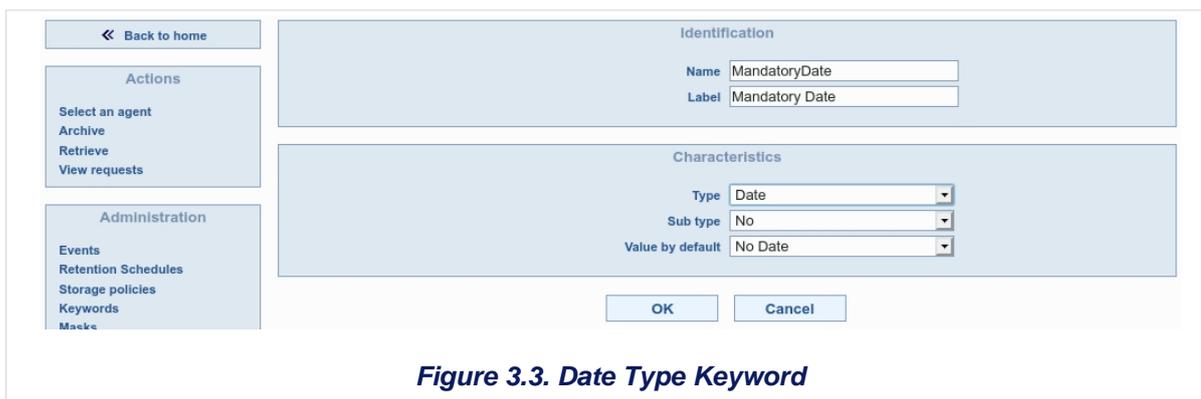
The **New** button located at the top of the page provides access to the page for creating a new keyword (Figure 3.2, “Creating a Keyword” [43]).



**Figure 3.2. Creating a Keyword**

- **Identification:** The code for this entity must be unique and must not include the following characters: ;, \, /, ", '. The label of this entity must not include the following characters: ;, \, /, " (the ' character is authorized). All other UTF-8 characters in the code or label are authorized.
- **Type:** Arcsys supports the following types of keywords:
  - Character strings: Can contain any characters
  - Date
  - Numerical
  - Controlled: List of predefined values.

The fields to enter can be defined according to the type selected. Thus, for the Date type, the input screen becomes the following:



- **Sub-Type:** For string-type keywords, Arcsys supports the following sub-type:
  - *Extended date:* Contains a string representing a date. To be valid, the metadata associated with a keyword of this sub-type must comply with the following formatting rules:
    - The field can start with a '+' or '-' (if there is nothing, the date is considered to be positive);
    - 1, 2, 3 or 4 digits must follow to represent a millennium, century, decade or year respectively;
    - If the year is specified (with 4 digits), the month can be specified. It must be preceded by a hyphen '-' and must be 2 digits.
    - If the month is specified, the day can be specified. It must be preceded by a hyphen '-' and must be 2 digits.
    - If the day is specified, the hour can be specified. It must be preceded by a space ' ' and must be 2 digits.
    - If the hour is specified, the minutes can be specified. They must be preceded by the character ':' and must have two digits;
    - If the minutes are specified, the seconds can be specified. They must be preceded by the character ':' and must have two digits;

Examples:

-05: 5th century BC

197: The 1970s

01/09/0881 1st September 881

2008-11-21 15:12: 21st November 2008 at 3:12pm

- **Default value:** You can define a default value for certain keywords. This value then appears automatically during archiving. For the date type, it is possible to select predefined dates such as the 1st day of the month or today's date.

This value is also used when changing the keyword type, deleting the association of a value to a controlled keyword, and changing the keyword level (see Mask/Keyword Association).

- **Mask:** The mask forces keyword values to comply with a certain format. When you enter a character string in this field, all the values for this keyword will then start with the entered string.
- **Saving:** After informing the fields and selecting the options, click *OK* to create the keyword in the Arcsys Database with the settings provided. Click on the **Cancel** button to return to the previous page, disregarding the data entered on the page.

### 3.1.4. Edition

You can access the edit page for an existing keyword by clicking on the name of the keyword to change in the list (Figure 3.1, “Keyword List” [42]).

The fields and functions shown on the edit screen for a keyword are globally identical to those shown on the creation screen.

To change a keyword type from string to date (and from date to string), you must fill in another field specifying the used date format. Date formats are specified by date and time pattern strings where letters from 'A' to 'Z' and from 'a' to 'z' are interpreted as pattern letters representing the components of a date or time string as detailed in the table below.



#### **Important**

**Before making this change, you need to be sure that all the values of the keywords have the same date format. Otherwise, data inconsistencies may appear after conversion.**

Letter	Component	Overview	Example
<b>G</b>	Era designator	Text	<i>AD</i>
<b>y</b>	Year	Year	<i>1996; 96</i>
<b>M</b>	Month in year	Month	<i>July; Jul; 07</i>
<b>w</b>	Week in year	Number	<i>27</i>
<b>W</b>	Week in month	Number	<i>2</i>
<b>D</b>	Day in year	Number	<i>189</i>
<b>d</b>	Day in month	Number	<i>2</i>
<b>F</b>	Day of week in month	Number	<i>2</i>
<b>E</b>	Day in week	Text	<i>Tuesday; Tue</i>
<b>a</b>	Am/pm marker	Text	<i>PM</i>
<b>H</b>	Hour in day (0-23)	Number	<i>0</i>
<b>k</b>	Hour in day (1-24)	Number	<i>24</i>
<b>K</b>	Hour in am/pm (0-11)	Number	<i>0</i>
<b>h</b>	Hour in am/pm (1-12)	Number	<i>12</i>
<b>m</b>	Minute in hour	Number	<i>30</i>
<b>s</b>	Second in minute	Number	<i>55</i>
<b>S</b>	Millisecond	Number	<i>978</i>
<b>z</b>	Time zone	General time zone Pacific Standard	<i>Time; PST; GMT-08:00</i>
<b>Z</b>	Time zone	RFC 822 time zone	<i>-0800</i>

For example, the date **2020-06-30** has the date format **yyyy-MM-dd**.

For more details, refer to <https://docs.oracle.com/javase/10/docs/api/java/text/SimpleDateFormat.html>.



## Note

Editing a keyword can result in the migration of the manifest for the lots affected by this modification. A dialog box appears requesting confirmation of the modification.

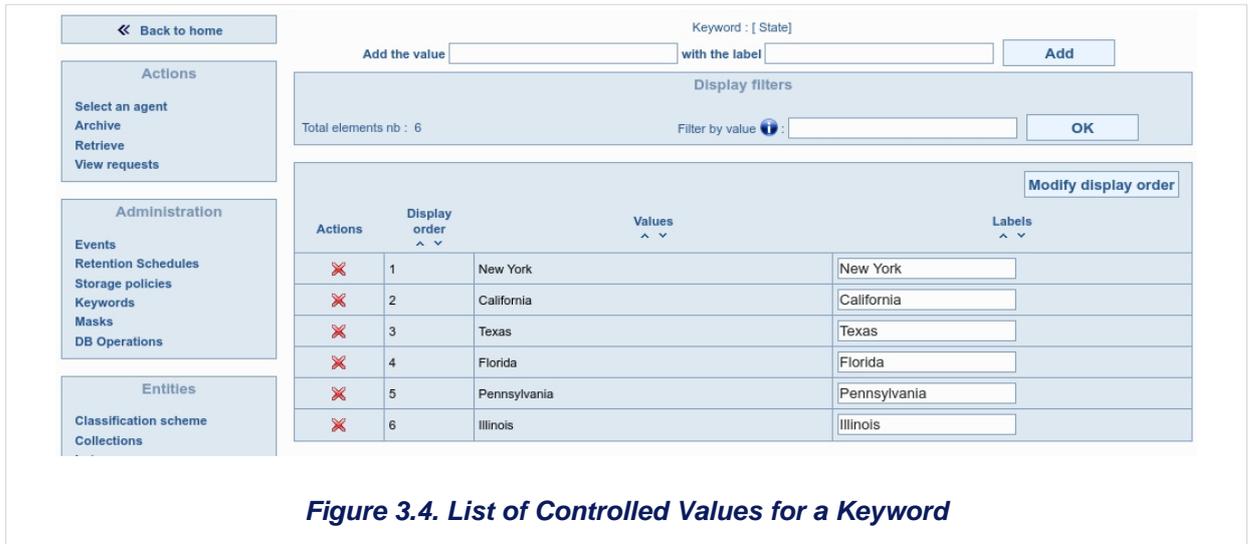
### 3.1.5. Managing Controlled Types

A controlled-type keyword is a keyword that can only have a list of predefined values. Each value can be associated to a label. If a label is associated to a value, this label will be added wherever the value appears. Otherwise, if no label is associated with the value, it is the value that is added.

Adding a new possible value for a keyword is done in two stages:

- In the keyword list screen (Figure 3.1, “Keyword List” [42]), click on "Controlled" for the keyword to edit. The screen shown Figure 3.4, “List of Controlled Values for a Keyword” [47] appears.
- Inform the **value** and/or **label** fields and click **Add** to add the specified value to the chosen keyword.

You can then order controlled values by clicking on the "**Modify display order**" button.



**Figure 3.4. List of Controlled Values for a Keyword**

To delete a value previously added to a controlled-type keyword, simply click on the icon  (Figure 3.4, “List of Controlled Values for a Keyword” [47]). A confirmation message then appears and the value is deleted.

Deleting a value has the following result:

- If the keyword is not mandatory: metadata associated with this value is deleted.
- If the keyword is mandatory: metadata associated with this value is changed for the default value of the keyword.

Therefore, if the keyword is used via a mask in mandatory mode and there is no default value (or if the default value is the value that you wish to delete), then you cannot delete this value.

### 3.1.6. Deletion

For each keyword that can be deleted, the icon  is enabled (Figure 3.1, “Keyword List” [42]). Click on this button to display a confirmation window. The selected keyword is deleted from the Arcsys Database.

## 3.2. Managing and Selecting Masks

You can access the screens for managing masks from **Masks** in the main menu. To access this section, you must first select a repository.

This menu is used to:

- List and search existing masks
- Select a mask
- Create new masks
- Edit existing masks
- Manage keywords allocated to masks
- Export a mask in XML format
- Manage exports backed up on the server (downloads, imports, deletes)
- Import a mask in XML format using an external backup (upload)
- Delete masks

### 3.2.1. List

The following screen (Figure 3.5, “Mask List” [48]) lists the masks present in the selected repository.

Use the search bar to add filters for the mask names or IDs.

The screenshot shows the 'Mask List' interface. At the top, there are buttons for 'New', 'Export management', 'Import from XML', and 'Export to Excel format'. Below these are filter options: 'Filter by name' and 'Filter by identifier', each with a search input and an 'OK' button. The main content is a table with the following data:

Sel	Id	Actions	Mask name	Label	Attached keywords	Creation date
<input checked="" type="checkbox"/>	4		EMPTY_MASK	Mask with no metadata		01/10/2021 11:43:02
<input checked="" type="checkbox"/>	5		MASK_ACCOUNTING	Basic mask for Invoices		01/10/2021 11:46:33
<input checked="" type="checkbox"/>	7		Contracts	Contracts		01/10/2021 12:10:10
<input checked="" type="checkbox"/>	8		BankStatements	Bank Statement		01/10/2021 12:12:37

Below the table, the caption reads: **Figure 3.5. Mask List**

### 3.2.2. Selection

To be associated with a collection, a mask must first be selected.

The masks that can be selected are represented by the icon . To select a mask, simply click on this icon. The mask then appears in the "Current selection" field (see Figure 3.5, "Mask List" [48]).

### 3.2.3. Creation

The **New** button located at the top of the page provides access to the page for creating a new mask (Figure 3.6, "Creating a Mask" [49]).



*Figure 3.6. Creating a Mask*

- **Identification:** The code for this entity must be unique and must not include the following characters: ;, \, /, ", '. The label of this entity must not include the following characters: ;, \, /, " (the ' character is authorized). All other UTF-8 characters in the code or label are authorized.
- **Saving:** After informing the fields, click **OK** to create the mask in the Arcsys Database with the settings provided. Click on the **Cancel** button to return to the previous page, disregarding the data entered on the page.

### 3.2.4. Edition

You can access the edit page of an existing mask by clicking on the  icon of the mask to edit in the list.

You can access the display page of an existing mask by clicking on the icon  of the mask to display in the list.

The editing and display screens are largely identical to the screens for creating a mask, so they will not be detailed here. See the section on creating a mask to learn the meaning of each of the fields.

### 3.2.5. Export

A mask is exported in XML format in the folder specified by the `STOCK_USERS_REP` parameter of the Arcsys Web Agent application agent:

- The mask with its details (code, label...);
- Association of the keywords with their details (lot or object level, mandatory or not);
- The details of these keywords (code, type, default value, etc.);
- Any controlled values associated with these keywords.

### 3.2.6. Managing Exports

Click the *Export Management* button to access the list of masks previously exported in the backup directory (see Figure 3.7, “Managing Mask Exports” [50]). The different actions allowed are as follows:

- Download the mask export in XML format via the *Zoom* button;
- Import the mask to the current repository via the *Run* button (import cannot take place if there is a conflict at associated mask code and/or associated keyword level);
- Delete the mask export via the *Trash bin* button (deletion is not possible if the mask export results from the export of an existing repository).



### 3.2.7. Import

The *Import from XML* button imports a mask via an external XML file.

Importing a mask manages conflicts: Thus:

- If a mask with the same code already exists in the repository, the import is not allowed;

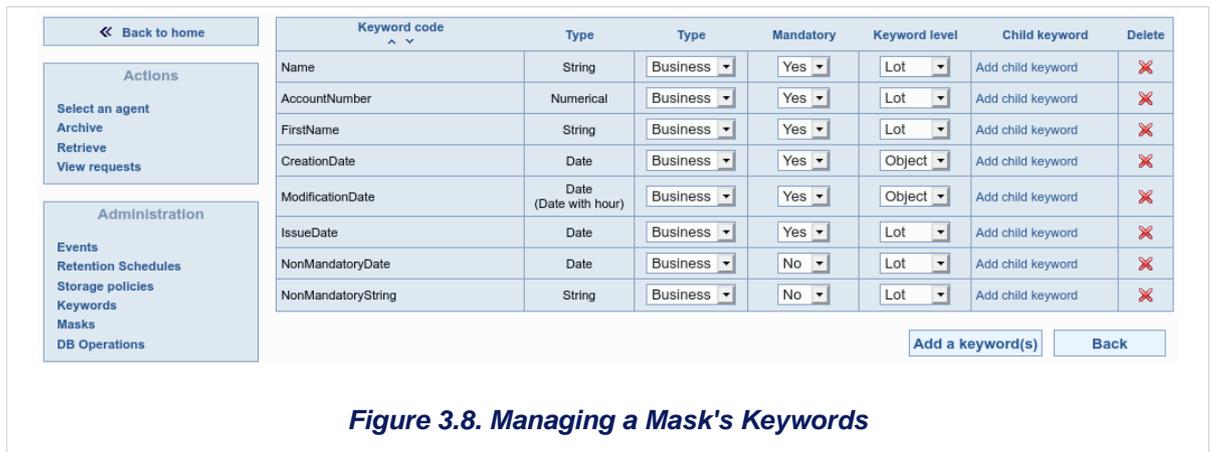
- If a keyword linked to the mask already exists in the repository, if it has exactly the same details as those of the original keyword, it is used; otherwise (for example, if it has the same code but a different type), the import is not allowed.
- The same goes for controlled values associated with an imported keyword; if the keyword of the destination repository has different controlled values, the import is not allowed.

### 3.2.8. Managing Keywords Associated with the Mask

A mask groups a set of keywords.

Adding keywords to a mask takes place in two stages:

1. In the mask list screen (Figure 3.5, “Mask List” [48]), click on the icon  (“Metadata” column) for the mask to edit. The screen shown Figure 3.8, “Managing a Mask's Keywords” [51] appears.



Keyword code	Type	Type	Mandatory	Keyword level	Child keyword	Delete
Name	String	Business	Yes	Lot	Add child keyword	✖
AccountNumber	Numerical	Business	Yes	Lot	Add child keyword	✖
FirstName	String	Business	Yes	Lot	Add child keyword	✖
CreationDate	Date	Business	Yes	Object	Add child keyword	✖
ModificationDate	Date (Date with hour)	Business	Yes	Object	Add child keyword	✖
IssueDate	Date	Business	Yes	Lot	Add child keyword	✖
NonMandatoryDate	Date	Business	No	Lot	Add child keyword	✖
NonMandatoryString	String	Business	No	Lot	Add child keyword	✖

**Figure 3.8. Managing a Mask's Keywords**

2. Click on the *Add keyword* button to display the interface used to select the keyword(s) to associate with the mask. This interface displays the key words that are not already present in the mask.

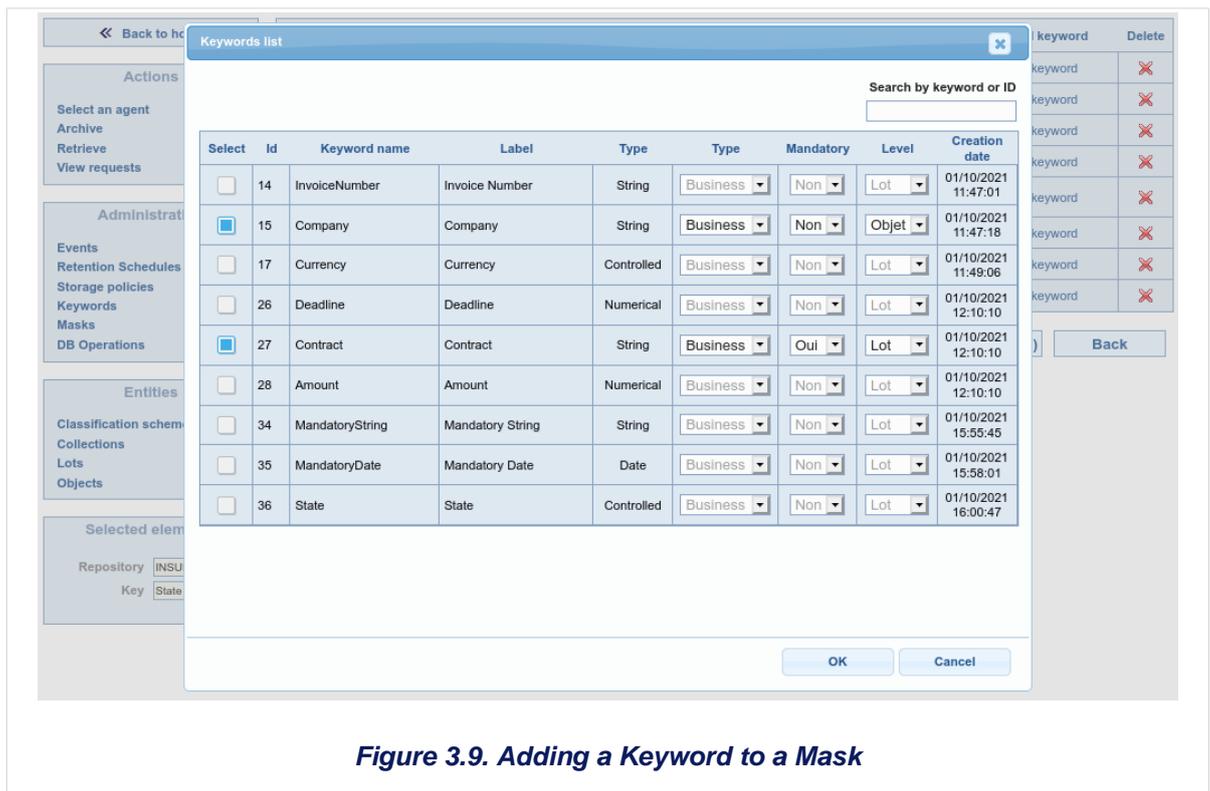


Figure 3.9. Adding a Keyword to a Mask

A keyword in a mask has the following characteristics:

- **Domain:** You can choose the domain (business or technical) of the keyword in the mask.
- **Mandatory/Optional:** You can make a keyword mandatory in a mask. This means that during an archiving procedure for a lot using this keyword, you must enter a value for this keyword. This parameter is entered on selecting the keyword in the attachment interface as described above for entry of the keyword level.
- **Keyword level:** You can choose whether, in a given mask, a keyword will have a Lot level or an Object level. A metadata item can thus be applied at the level of a lot or at the level of each of its objects.

The choice of keyword level is done in the interface used to attach one or more keywords to the mask. When you select the keyword to attach, you can also choose its level (Lot or Object). Figure 3.9, “Adding a Keyword to a Mask” [52].

- **Child keyword:** You can attach child keywords to a keyword. You cannot attach a child keyword to a keyword that already has a child keyword.

To delete metadata previously added to a mask, simply click on the icon (Figure 3.8, “Managing a Mask’s Keywords” [51]).

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## Note

A change of level or mandatory status for a keyword impacts the metadata, and therefore generates migration of the manifest of archived lots.

## 4. Retention Schedule

### 4.1. Managing Retention Schedules

To access the screens for managing retention schedules, choose **Retention Schedules** and **Events** in the main menu. To access these menus, you must first select a repository.

These menus let you:

- Create or change an event
- Delete an event
- Import or export an event in XML format
- Create or Change a retention schedule
- Delete a retention schedule
- Import or export a retention schedule in XML format

#### 4.1.1. Event

An event is characterized by:

- **Identification:** The code for this entity must be unique and must not include the following characters: ;, \, /, ", '. The label of this entity must not include the following characters: ;, \, /, " (the ' character is authorized). All other UTF-8 characters in the code or label are authorized.
- An optional date

#### 4.1.2. Retention schedule

A retention schedule is characterized by:

- **Identification:** The code for this entity must be unique and must not include the following characters: ;, \, /, ", '. The label of this entity must not include the following characters: ;, \, /, " (the ' character is authorized). All other UTF-8 characters in the code or label are authorized.
- An event triggering the start of retention (which is either a specified code generic event, the archiving date, or the retention start date)

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- An event triggering the end of retention (which is either nonexistent, or a set date, or a duration)

The retention schedule can then be attached to a classification scheme class or directly to a record.

# 5. Configuring Sites and Arcsys Engines

## 5.1. Managing Sites

You can access screens used to manage sites by clicking **Sites**.

This menu entry is available in the **Administration menu** and can be accessed without selecting a repository.

This menu is used to:

- List the existing sites
- Create new sites
- Edit or display the details of existing sites
- Delete sites



### Important

There must be at least one site for Arcsys to run correctly.

### 5.1.1. List

The following screen (Figure 5.1, “Site List” [56]) lists the sites registered in the Arcsys Database, with for each site:

- Its code
- Its label
- Its status, active or inactive.

Id	Actions	Code	Label	Site state
3		SECONDARY_SITE	SECONDARY_SITE	✗
2		CLUSTER	CLUSTER	✗
1		PRIMARY_SITE	PRIMARY_SITE	✓

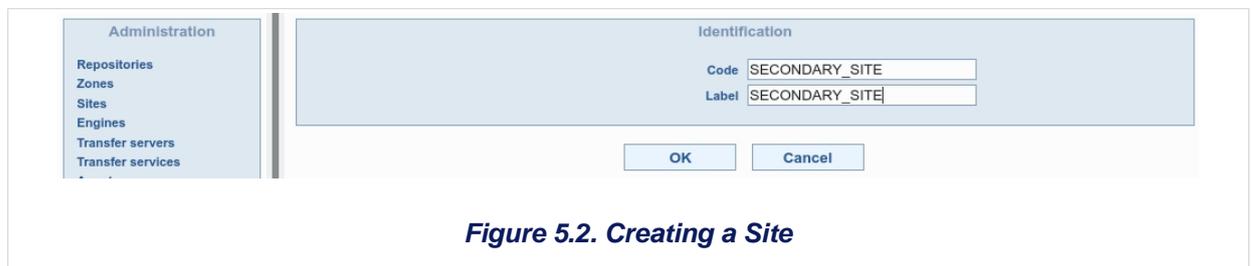
Figure 5.1. Site List

## 5.1.2. Creation

The **New** button located at the top of the page provides access to the page for creating a new site (Figure 5.2, “Creating a Site” [57]).

The site details to enter are:

- **Code:** This code will be used in the SITE\_CODE parameters of the property files for Arcsys components (see [Arcsys Administration Manual](#)) to link them to a site. It must be unique.
- **Label:** You can enter here a description to identify the site.



*Figure 5.2. Creating a Site*

## 5.1.3. Edition

You can access the edit page of an existing site by clicking on the icon.  icon of the site to edit in the list.

You can access the display page of an existing site by clicking on the icon.  icon of the site to display in the list.

The editing and display screens are largely identical to the screens for creating a site, so they will not be detailed here. See the section on creating a site to learn the meaning of each of the fields.

## 5.1.4. Deletion

For each of the sites over which the connected user has deletion rights, the icon  is enabled. Click on this button to display a confirmation window. The selected site is deleted from the Arcsys Database.

## 5.2. Managing Arcsys Engines

You can access screens used to manage Arcsys Engines by selecting **Engines**.

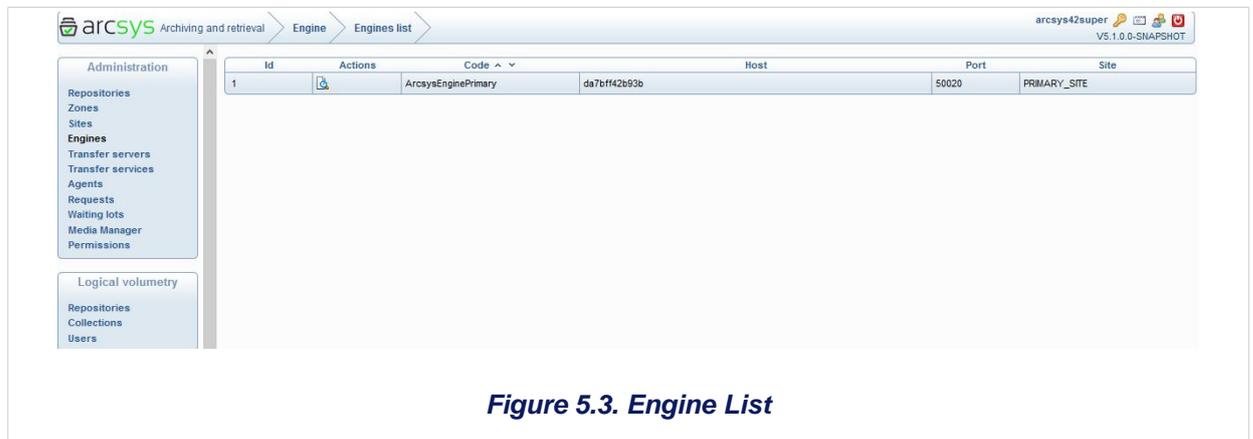
This menu entry is available in the **Administration menu** and can be accessed without selecting a repository.

This menu is used to:

- List the existing Arcsys Engines.
- Display the details of existing Arcsys Engines

### 5.2.1. List

The following screen (Figure 5.3, “Engine List” [58]) lists the Arcsys Engines registered in the Arcsys Database.



**Figure 5.3. Engine List**

### 5.2.2. Display

Display an engine by clicking on the button  to display certain settings, such as:

- Arcsys Engine host and port
- Version
- Site where the Arcsys Engine is installed
- Specialisations (whether it processes archiving, retrieval, migration, etc. requests)

These settings are specified in the `ENGINE.properties` properties file (see the [Arcsys Administration Manual](#)) and can only be modified using the properties file.

Restitution > Moteur > Consultation >

arcsys42auper 

Caractéristiques générales	
Champs	Valeurs
Code	ArcsysEnginePrimary
Libellé	ArcsysEnginePrimary
Version	V4.7.0.0
Site	PRIMARY_SITE

Caractéristiques système du moteur	
Champs	Valeurs
OS	Linux
Hôte	lat103.labo.infotel.com
Port	50020
Répertoire d'installation	/home/arcsys/ArcsysRelease/workspace/HEAD/ArcsysDeployed/ArcsysEngine
Traite les requêtes d'archivage	✓
Traite les requêtes de restitution	✓
Traite les requêtes de migration	✓
Traite les requêtes de reprise	✗
Traite les requêtes de copie	✗
Traite les requêtes de vérification de zone	✗
Traite les requêtes de synchronisation	✗
Traite les requêtes différées	✓

[Retour](#)

**Figure 5.4. Querying an Arcsys Engine**

## 6. Managing Arcsys Transfer Servers

This interface is used to manage Arcsys Transfer Servers and is accessed by selecting **Transfer servers**.

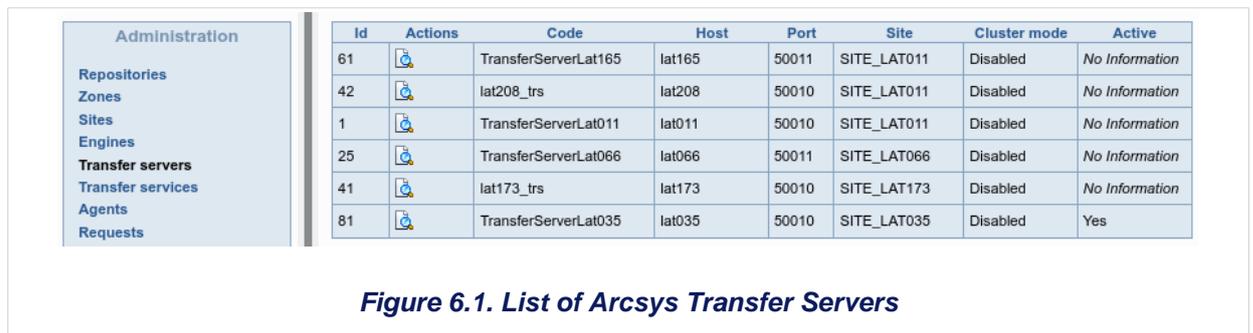
This menu entry is available in the **Administration menu** and can be accessed without selecting a repository.

This menu is used to:

- List the existing Arcsys Transfer Servers
- Display the details of existing Arcsys Transfer Servers

### 6.1. List

The following screen (Figure 6.1, “List of Arcsys Transfer Servers” [60]) lists the Arcsys Transfer Servers registered in the Arcsys Database.



Id	Actions	Code	Host	Port	Site	Cluster mode	Active
61		TransferServerLat165	lat165	50011	SITE_LAT011	Disabled	No Information
42		lat208_trs	lat208	50010	SITE_LAT011	Disabled	No Information
1		TransferServerLat011	lat011	50010	SITE_LAT011	Disabled	No Information
25		TransferServerLat066	lat066	50011	SITE_LAT066	Disabled	No Information
41		lat173_trs	lat173	50010	SITE_LAT173	Disabled	No Information
81		TransferServerLat035	lat035	50010	SITE_LAT035	Disabled	Yes

**Figure 6.1. List of Arcsys Transfer Servers**

### 6.2. Display

Display a Arcsys Transfer Server by clicking on the button  to display certain settings, such as:

- Arcsys Transfer Server code, host and port
- Installation directory
- Operating system (OS) of the server

These different parameters are inserted by each Arcsys Transfer Server on startup.

**Administration**

- Repositories
- Zones
- Sites
- Engines
- Transfer servers
- Transfer services
- Agents
- Requests
- Pending tasks on lots
- Media Manager

**Security center**

- Permissions

**Logical volumetry**

- Repositories
- Collections
- Users

[End User] My archives

General properties	
Fields	Values
Code	TransferServerLat035
Site	SITE_LAT035

System properties	
Fields	Values
OS	Linux
Host	lat035
External Host	
Port	50010
Install folder	/opt/Infotel/Arcsys/ArcsysTransferServer/
Cluster mode	Disabled
Cluster port	
Last start	18/02/2022 15:11:14
Last up	18/02/2022 15:17:14
Up interval (seconds)	30

[Back](#)

**Figure 6.2. Querying a Arcsys Transfer Server**

## 7. Managing Arcsys Transfer Services

This interface is used to manage Arcsys Transfer Services and is accessed by selecting **Transfer servers**.

This menu entry is available in the **Administration menu** and can be accessed without selecting a repository.

This menu is used to:

- List the existing Arcsys Transfer Services
- Display the details of existing Arcsys Transfer Services

## 8. Storage

### 8.1. Managing Zones

You can access screens used to manage zones by clicking **Zones**.

This menu entry is available in the **Administration menu** and can be accessed without selecting a repository.

This menu is used to:

- List and search existing zones
- Create new zones
- Change existing zones
- Delete zones



#### Important

**When a media manager other than ArcMover is used:**

- **for Cloud media manager: the Arcsys zones match the bucket names defined on the Cloud provider. They must have exactly the same name; otherwise the archiving and migration procedures do not work.**

#### 8.1.1. List

The following screen (Figure 8.1, “Zone List” [64]) lists the zones registered in the Arcsys Database.

Use the search bar to add filters for the zone names or IDs.

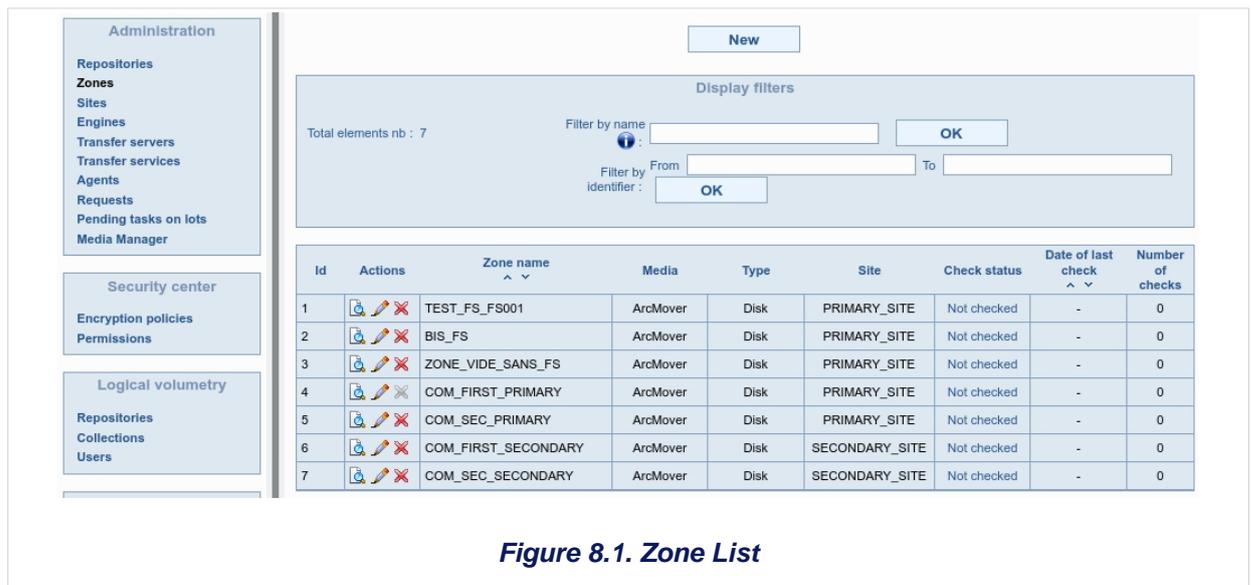


Figure 8.1. Zone List

## 8.1.2. Creation

The **New** button located at the top of the page provides access to the page for creating a new zone (Figure 8.2, “Creating a Zone” [64]).

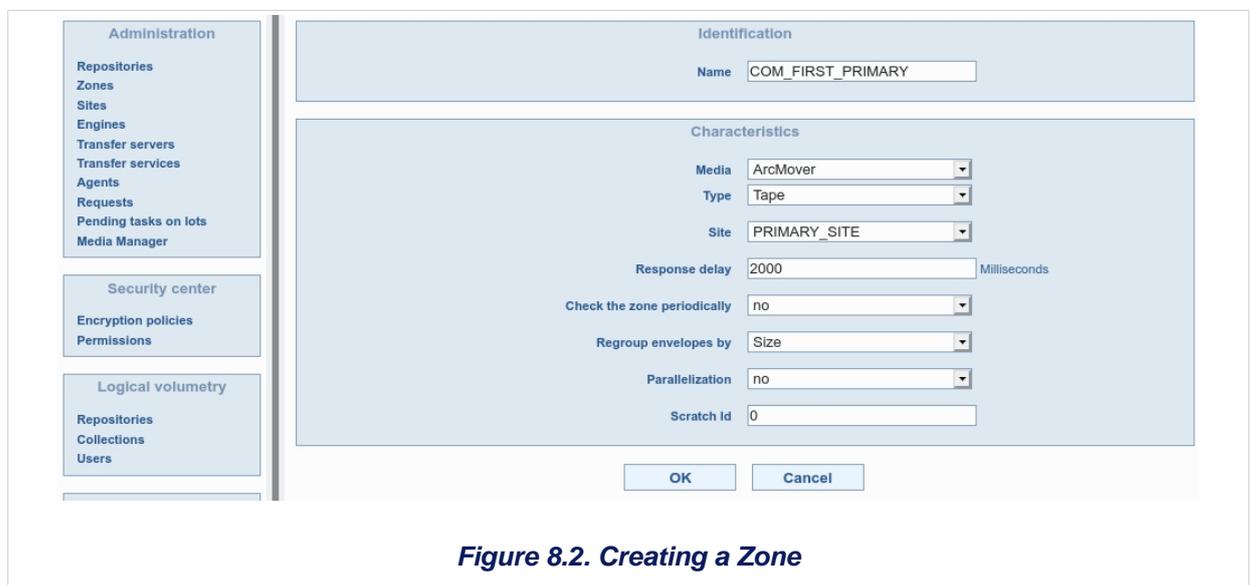


Figure 8.2. Creating a Zone

- **Identification:** A zone must be identified by a name and a media that must be unique. For a Cloud or Generic type zone, the configuration field is added. The name, media and configuration must be unique.
- **Name:** A zone must be identified by a name, which must be unique and contain only letters, numbers, hyphens (-), underscores (\_) or spaces. For a Cloud type zone, the name must correspond to the bucket name.

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- **Media:** The "Media" field is used to select the *media manager* to be used for this zone (see the Arcsys functional architecture schema in the [Arcsys Presentation Manual](#)).

Arcsys supports three *media managers*: ArcMover™, Cloud and Generic, which manage how to access the storage zones. You can nonetheless select "External to Arcsys", but if this media is selected, archiving in this zone will be **dummy**.

- **Type** (only available for ArcMover™ and Cloud medias): ArcMover™ supports two types of zones: `tape` and `disk`. Cloud zone supports one type of zones: `s3` (for S3-compatible cloud providers).
- **Site:** A zone must belong to a given site. This is the site that physically contains the storage hardware that will be associated with the zone.
- **Configuration** (only available when `media` is set to `Cloud` or `Generic`): A Cloud or Generic type zone must be associated with a configuration of the media manager.

For more details, please refer to the [Arcsys Installation Manual](#).

The field is not case-sensitive and must contain only letters, numbers, hyphens (-), underscores (\_) or spaces.

- **Response times:** This field is used to enter the average time when archiving in this zone.
- **Check the zone periodically:** This field indicates if you want this zone to be taken into account by the automatic zone checking process.
- **Zone check frequency:** If the response to the previous question is "yes", you can then specify the frequency of the zone check in days.
- **Regroup envelopes by:** This field indicates the type of algorithm that will be used to regroup envelopes on the media.

For more details, please refer to the [Arcsys Functional Description Manual](#).

Depending on the type of grouping chosen, additional fields may be available:

- **Parallelization** (only available when `regroup envelopes by` is set to `size`): is used to minimize the number of media used (without parallelization) or to maximize the number of drives used and also fasten the archiving process (with parallelization). It can be set to: `no` or `yes`.
- **Maximal size of spool** (only available when `regroup envelopes by` is set to `Spooler`): records will be regrouped until they reach the size specified (in MiB). When this size is reached, a chunk is created and archived on the media. When set to `0`, this limit is ignored.

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The maximal size of spool is limited by the maximal size of lot in spooler and the number of *async\_archive\_session*. Please consider to set a maximal size of spool to a value that is less than or equal to the maximal lot size in spooler multiplied by the value specified for the *async\_archive\_session* parameter. In any other case, this limit will never be reached.

- **Spooler waiting time for a new lot** (only available when *regroup envelopes by* is set to *Spooler*): after a record is added to the spooler, the Arcsys Transfer Server waits for the delay specified (in seconds). If no more archiving request is received on the zone at the end of this delay, the chunk is archived whatever the value of other parameters.
- **Maximal lot size in spooler** (only available when *regroup envelopes by* is set to *Spooler*): allows to limit the size of lots in the spooler. If a record exceeds this size (in MiB), it is archived directly on the media, as if the zone was set to *regroup envelopes by size* option with no parallelization. When set to 0, this limit is ignored.

The maximal lot size in spooler can not exceed 8 GiB, whatever the value specified. When set to a value greater than 8 GiB, this limit will never be reached.

- **Maximal number of lots in spooler** (only available when *regroup envelopes by* is set to *Spooler*): set the maximal number of records that will constitute the chunk. When set to 0, this limit is ignored.

The number of lots that can be processed simultaneously by the Arcsys Transfer Server is limited by the number of *async\_archive\_session*. Please consider to set a limit of maximal number of lots in spooler less than or equal to the value specified for the *async\_archive\_session* parameter. In any other case, this limit will never be reached.

- **Scratch Id:** The *ScratchId* field is only required if Arcsys is configured to operate with ArcMover Tape Option.

This number represents a set of tapes known to the tape library. Thus, if an archiving/retrieval procedure takes place on this zone, the tape library will automatically recognize the concerned tapes.

The number specified in this field must correspond to the one set for the tapes in the *[scratchpools]* section of *etc/arcmove/<peripheral>.conf* file. See [Arcsys Administration Manual](#) and [Section 12.3, "Tape Management" \[99\]](#).

- **Saving:** After informing the fields and selecting the options, the **ok** button creates the zone in the Arcsys Database with the settings provided. Click on the **Cancel** button to return to the previous page, disregarding the data entered on the page.

### 8.1.3. Display or Edition

You can access the edit page of an existing zone (identical to Figure 8.2, “Creating a Zone” [64]) by clicking on the icon  of the zone to be edited in the list.

You can access the display page of an existing zone (identical to Figure 8.2, “Creating a Zone” [64]) by clicking on the icon  of the zone to display in the list.

The editing and display screens are largely identical to the screens for creating a zone, so they will not be detailed here. See the section on creating a repository to learn the meaning of each of the fields.

### 8.1.4. Deletion

For each of the zones for which the connected user has delete rights, the icon  is enabled. Click on this button to display a confirmation window. The selected zone is deleted from the Arcsys Database.

## 8.2. Displaying Zone Check Status

Click on the check status for a zone to access the history of all its check statuses.

This menu is used to:

- List all the check statuses for the zone
- List of any error messages

### 8.2.1. List

The following screen (Figure 8.3, “Check Status List” [68]) lists the check status of the selected zone.

Use the search bar to add filters for the check status, as well as its ID.

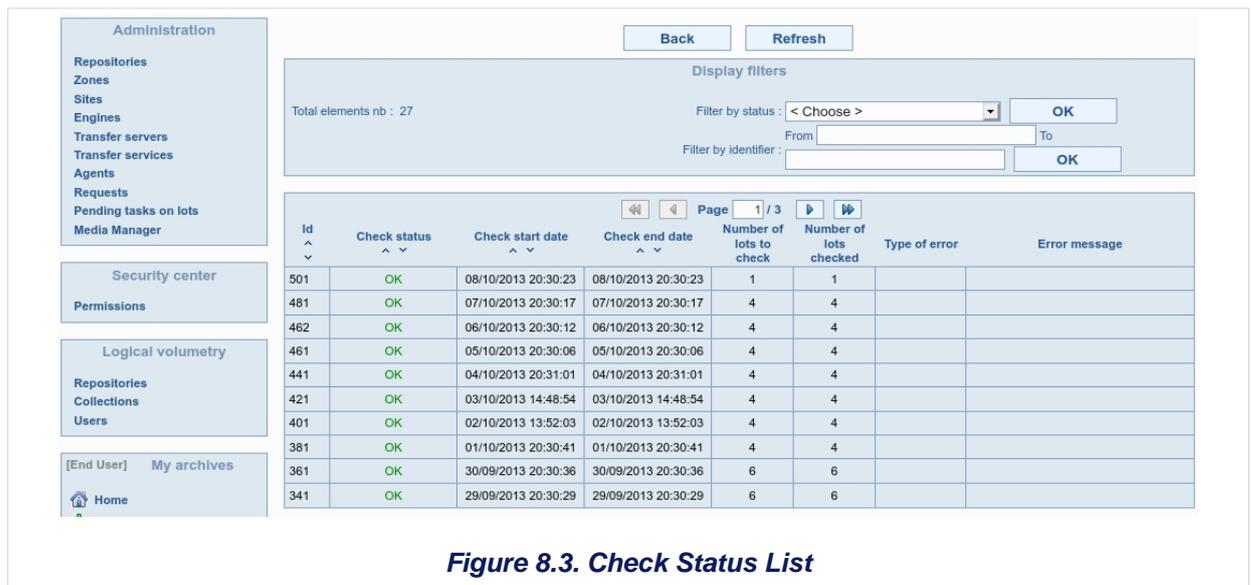


Figure 8.3. Check Status List

As represented in Figure 8.3, “Check Status List” [68], the history also contains details on errors that may have occurred. Error codes, as well solutions, are explained in the Arcsys Errors Manual.

## 8.3. Managing and Selecting Storage Policies

You can access the screens for managing storage policies from **Storage Policies** in the main menu. To access this section, you must first select a repository.

This menu is used to:

- List and search existing profiles
- Select a storage policy
- Create new storage policies
- Edit existing storage policies
- Manage zones associated with storage policies
- Export a storage policy in XML format
- Manage exports backed up on the server (downloads, imports, deletes)
- Import a storage policy in XML format using an external backup (upload)
- Delete storage policies

### 8.3.1. List

The following screen (Figure 8.7, “Storage Policy Zone List” [72]) lists the storage policies present in the selected repository.

Use the search bar to add filters for the storage policy names or IDs.



Figure 8.4. Storage Policies Lists

### 8.3.2. Selection

To associate a storage policy to a collection, it must first be selected.

The storage policies that can be selected are represented by the icon . To select a storage policy, simply click on this icon. The storage policy then appears in the "Current selection" field (see Figure 8.4, "Storage Policies Lists" [69]).

### 8.3.3. Creation

The **New** button located at the top of the page provides access to the page for creating a new storage policy (Figure 8.5, "Creating a Storage Policy" [69]).

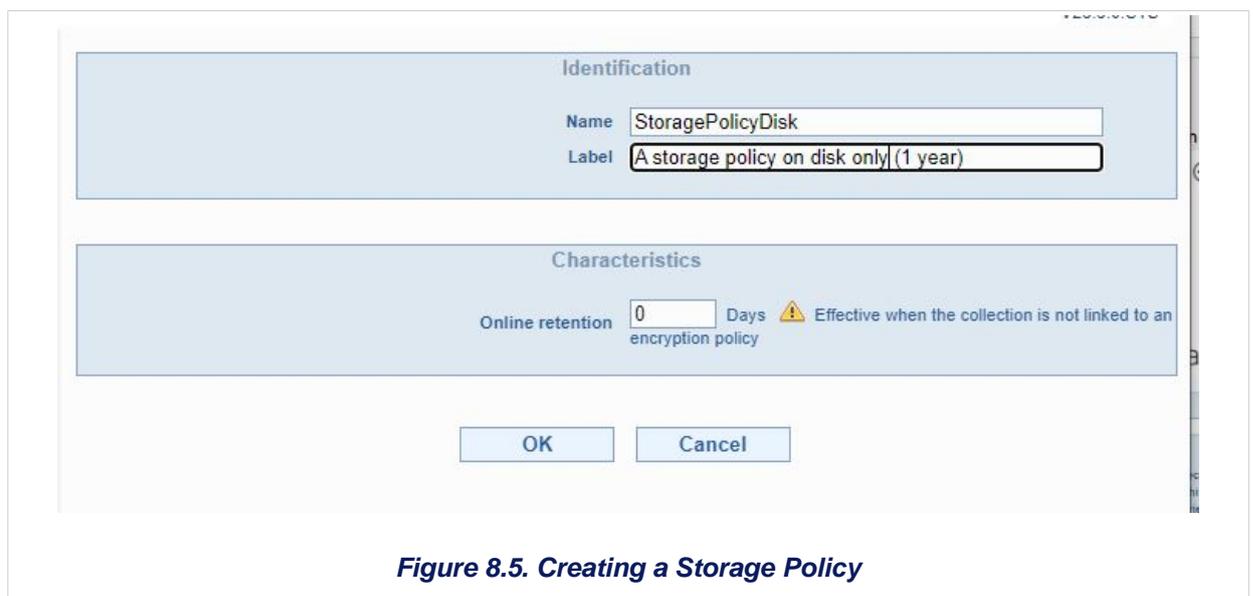


Figure 8.5. Creating a Storage Policy

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- **Identification:** The code for this entity must be unique and must not include the following characters: ;, \, /, ", ' . The label of this entity must not include the following characters: ;, \, /, " (the ' character is authorized). All other UTF-8 characters in the code or label are authorized.
- *Online retention:* The "Online retention" field determines the number of days or the lot is available online, i.e. viewable via the web.
- *Saving:* After informing the fields and selecting the options, the **ok** button creates the storage policy in the Arcsys Database with the settings provided. Click on the **Cancel** button to return to the previous page, disregarding the data entered on the page.

### 8.3.4. Edition

You can access the edit page for an existing storage policy by clicking on the name of the storage policy to modify in the list (Figure 8.4, "Storage Policies Lists" [69]).

The fields and functions shown on the edit screen for a storage policy are globally identical to those shown on the creation screen (Figure 8.5, "Creating a Storage Policy" [69]).

### 8.3.5. Export

A storage policy is exported in XML format in the folder specified by the `STOCK_USERS_REP` parameter of the Arcsys Web Agent:

- The storage policy with its details (code, label, retention, etc.);
- The associations with the zones (pools) with their details (duration, compression, priority, mandatory or not).

### 8.3.6. Managing Exports

Click the *Export Management* button to access the list of storage policies previously exported in the backup directory (see Figure 8.6, "Managing Storage Policy Exports" [71]), and then:

- Browse the XML file online (zoom button);
- Import one of these files in the current repository (run button);
- Delete one of these files (trash bin button).

Num.	Profile code	Action	Profile label	From repository with code
1	PROFIL_COM		Profil de stockage des documents comptables	Screenshot
2	NAS_Storage		NAS Storage	Screenshot
3	FS simple		FS simple	AFP
4	FS_BIS		sur TS bis	Test
5	LogSpaceDefault		Log Space Default Profile	AdminBase
6	LogSpaceDefault		Log Space Default Profile	AdminBase
7	FS simple		FS simple	AFP
8	NAS_Storage		NAS Storage	Screenshot
9	PROFIL_COM		Profil de stockage des documents comptables	Screenshot
10	NAS_Storage		NAS Storage	Screenshot

[Storage policies list](#)

**Figure 8.6. Managing Storage Policy Exports**

### 8.3.7. Import

The *Import from XML* button imports a mask via an external XML file.

### 8.3.8. Managing Associated Pools

storage policies define the storage duration and media for a collection. All lots belonging to this collection therefore comply with the same storage policy.

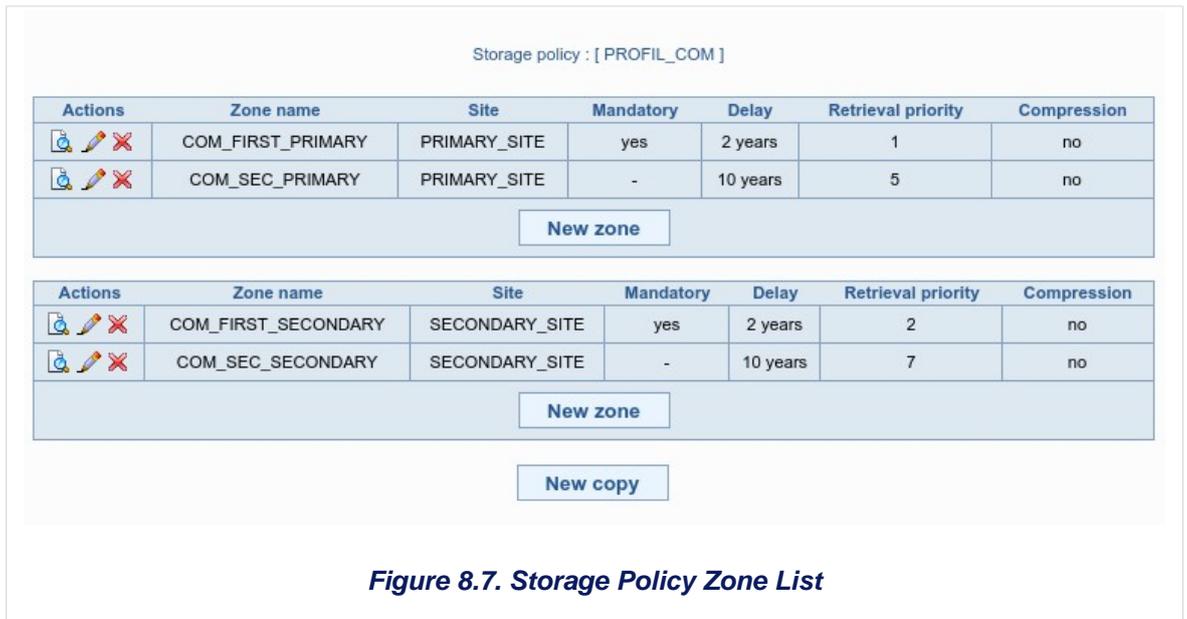
For each storage policy, you can specify as many "copies" as you wish.

*Example:* You can configure a storage policy so that, during archiving, data is stored on several media at a time (Figure 8.7, "Storage Policy Zone List" [72]). A lot can therefore be located on several zones at any given time.

### 8.3.9. Adding a Zone to a storage policy

Adding a storage media (called "zone" in Arcsys) to a storage policy is done in three steps:

1. In the storage policy list screen, click on the icon (in the "Associated Zones") to change a storage policy. The screen shown Figure 8.7, "Storage Policy Zone List" [72] appears.
2. Click on the **New copy** button to add a new zone sequence to the storage policy. Each zone sequence can belong to a different site, however within the same sequence, all zones must belong to the same site.



- On each Figure 8.8, “Adding a Zone to a Storage Policy” [73] screen, enter the different data requested:
  - Zone:** Defines which zone you wish to associate with this storage policy.
  - Mandatory:** Specifies whether you want successful data archiving on the zone to be mandatory in order for the archiving to be successful.
  - Priority:** If a lot is present on more than one zone at a given time, the priority will determine from which zone the retrieval must take place. The zone with the highest priority will be requested to retrieve the data. If this zone fails, Arcsys tries again on a zone with a lower priority. **[1=high priority]**
  - Duration and Unit:** Defines the time period during which the record will remain on the selected zone.
  - Compression:** You can choose to compress data as well as the level of compression desired. The compression level goes from 1 to 9, 1 for the highest speed and 9 for the best compression rate. This compression concerns files archived on the media but does not affect the manifest.

Figure 8.8. Adding a Zone to a Storage Policy

### 8.3.10. Adding a New Zone to a Sequence Already Created

Once the first zone is associated with the storage policy, a new button *new zone* will appear. This button adds a new zone to the sequence already created. This zone must be part of the same site as the previous zone.

### 8.3.11. Changing a Zone

To change the way in which a zone is associated with a storage policy, click in the screen shown Figure 8.7, “Storage Policy Zone List” [72] on the icon . If the icon appears, you cannot change the details of this zone in the storage policy. Hover the cursor over it for an explanation.

The screen used to edit the storage zone/profile association is identical to Figure 8.8, “Adding a Zone to a Storage Policy” [73].

### 8.3.12. Deleting a Zone

To delete a storage policy zone, click in the Figure 8.7, “Storage Policy Zone List” [72] screen on the icon .

By clicking on this icon, a confirmation window is displayed. The association between the zone and the storage policy selected is then deleted from the Arcsys Database.

If the icon appears, you cannot delete this zone from this storage policy. Hover the cursor over it for an explanation.

### 8.3.13. Displaying a Zone

Click on the icon to display the details of the zone without changing it.

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### 8.3.14. Note

If you select a zone whose media is not managed by Arcsys, you cannot add a copy or a zone.

# 9. Archiving, Retrieving and Migrating

## 9.1. Archiving: Creation

You can access the screens used to create records for archiving by selecting **Actions** => **Archive** from the main menu. To access this menu, you must first select a repository, a collection, and a lot containing objects and an agent (unless the storage policy media is not managed by Arcsys).

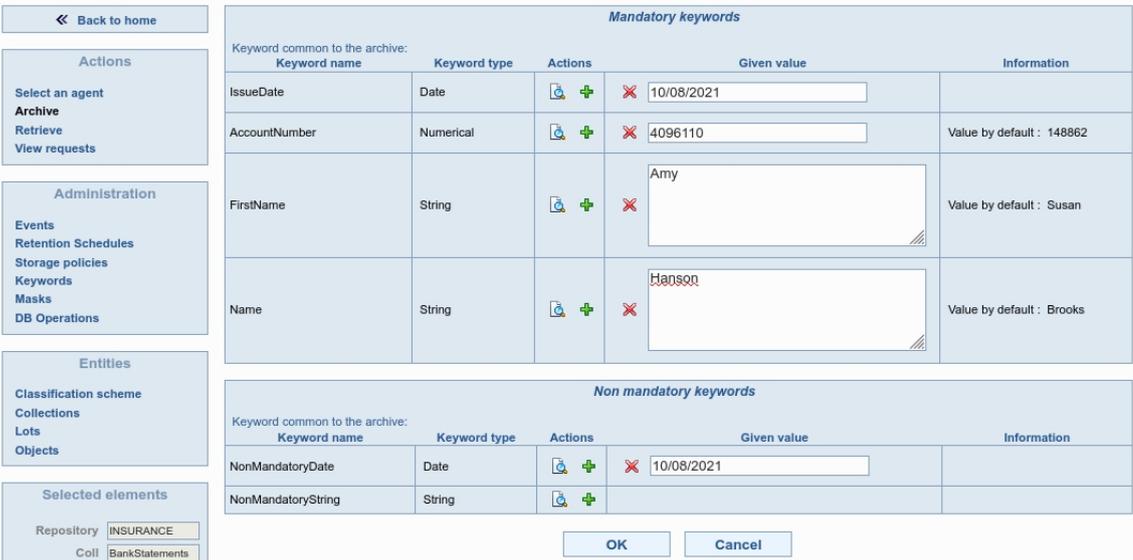
Use this menu to create new archiving orders only.

### 9.1.1. Entering Keyword Values

The first step when creating an archiving request is to enter the metadata for each keyword registered in the collection of the lot to archive.

Each value entered is checked according to its type and input mask. Only optional keywords can be left blank.

When entering date-type values, you can click on a button to select the date from a calendar.



Mandatory keywords				
Keyword common to the archive:				
Keyword name	Keyword type	Actions	Given value	Information
IssueDate	Date		<input type="text" value="10/08/2021"/>	
AccountNumber	Numerical		<input type="text" value="4096110"/>	Value by default : 148862
FirstName	String		<input type="text" value="Amy"/>	Value by default : Susan
Name	String		<input type="text" value="Hanson"/>	Value by default : Brooks

Non mandatory keywords				
Keyword common to the archive:				
Keyword name	Keyword type	Actions	Given value	Information
NonMandatoryDate	Date		<input type="text" value="10/08/2021"/>	
NonMandatoryString	String		<input type="text"/>	

**Figure 9.1. Creating an Archiving Request - Entering Keyword Values**

### 9.1.2. Choosing the Priority

As described in Arcsys Functional Description Manual a priority must be assigned to a request.

### 9.1.3. Retention Start Date

On archiving, you can change the start date of the lot retention.



When the **OK** button is enabled, the archiving request is immediately saved, and the archiving tracking screen appears.

## 9.2. Retrieval: Creation

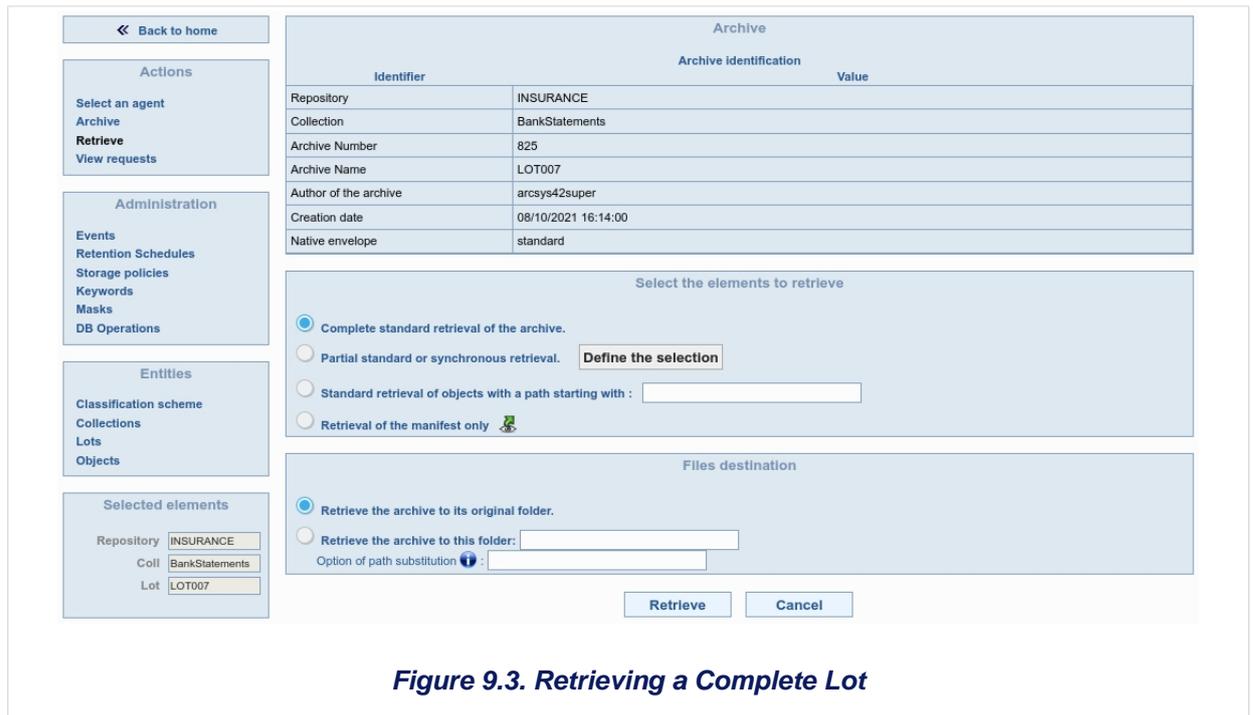
You can access the screens used to create retrieval requests by selecting **Actions => Retrieve** from the main menu. To access this menu, you must first select a repository, an agent and a lot.

This menu retrieves a lot or a part of a lot.



### Important

**For security reasons, you cannot create an archive restitution request through the web interface.**



## 9.2.1. Elements to Retrieve

Retrieval can be full or partial. A partial retrieval can be performed using the retrieval by item selection, or by using a path-based retrieval (restoring all the items where the path starts with the indicated path). You can retrieve the manifest only.

If there are several lots to be retrieved (via, for example, global retrieval action on the search result screen), an option to retrieve each lot in a sub-folder is available. The name of this sub-folder is configured with the **REST\_PREFIX\_PATH** parameter in the configuration file.

If the lot belongs to at least one category, a confirmation window appears when you click the **Retrieve** button. To continue the retrieval operation, you must validate all the categories to which the lot belongs.

Then, the retrieval request is saved and the retrieval tracking screen is displayed. Click on the **Cancel** button to return to the previous screen.

The agent used to perform the retrieval is the agent selected (present in the "Current selection" field).

### ArcAFP Option:

For a partial retrieval, the objects retrieved can be retrieved in different files or merged in a single file.

By default, the results files are merged in a single file. Where you do not want to merge the result, the results files are named via the `DEFAULT_AFP_RENAME_MASK` parameter of the Arcsys Engine configuration file.

If this parameter is not entered, the default mask will be used  
(result<reqid>\_<objid>.afp)

You can also convert documents to PDF format (*by default no conversion takes place*) by selecting the *Conversion of retrieved documents to PDF format* option. If this option is selected, the *Use default fonts* option appears to reduce the size of PDF files generated by substituting the character fonts used in the AFP files with standard character fonts.

- **Priority:** Arcsys can be used to define different levels of priority for retrieval tasks. The possible levels are: immediate, high, normal and low.
- **Retrieval directory:** For the retrieval directory, you can choose between the original directory and a specific directory.

For a specified directory, you can directly retrieve the items located in a specific path in this directory. More specifically, this means that for a lot that contains the `home/arcsys/test1/test1.txt` and `home/arcsys/test2/test2.txt` files, if you choose `/tmp` as a retrieval directory, and you choose `/home/arcsys/test1/` as the path for items to retrieve directly in the retrieval directory, then you retrieve both lot files in the `/tmp/test1.txt` and `home/arcsys/test2/test2.txt` paths. `/tmp/home/arcsys/test2/test2.txt`

#### ArcAFP Option

If the lot contains native files, you can retrieve them using the default directory specified at the configuration file level in the Arcsys Application Agent (this is the `NATIVE_DEFAULT_DIRECTORY` parameter of the `APPAGENT.properties` file).



### **Important**

**For MVS objects, this directory is ignored; the object is retrieved in its original location. If the file already exists, it is deleted before the retrieval operation. You should therefore back up the file before retrieval if it already exists, so as not to lose data.**

## 9.2.2. Choosing Objects for Partial Retrieval

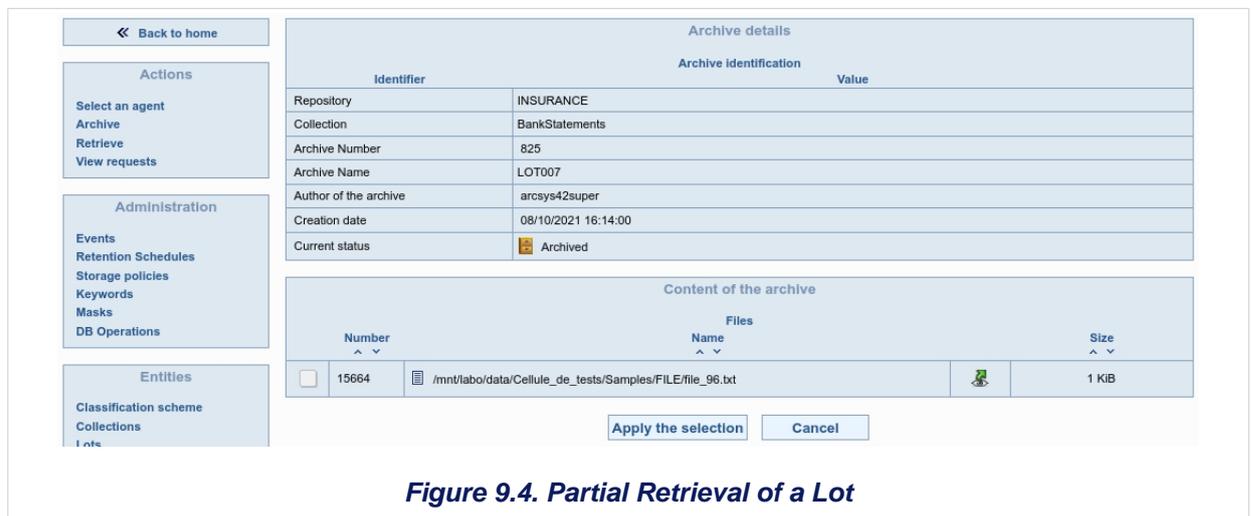
To choose the objects to retrieve, simply click on the *Define selection* button (see Figure 9.3, “Retrieving a Complete Lot” [77]). A new page then appears (see Figure 9.4, “Partial Retrieval of a Lot” [79]) with the list of lot files.

Select the checkboxes for objects to retrieve. When you select/deselect a directory-type object, all files archived in this directory are automatically selected/deselected.

If a directory is selected and you deselect one of the archived files, this deselects the directory.

The type specifies if the file is:

- A link (the target is also displayed)
- A regular file
- A directory
- A special character file
- A special block file
- A special FIFO file



### 9.2.3. Online Retrieval of an Object

With the Arcsys web interface, you can display or directly download archived files from this interface. To do this, click on the  **Online Retrieval** icon on the object selection page (see Figure 9.4, “Partial Retrieval of a Lot” [79]).

After clicking on this icon, the object retrieval begins and a “wait” pop-up window is displayed. Once the retrieval is complete, a link to the selected file is shown in the pop-up window.

If the lot belongs to at least one category, a confirmation window has to be validated before accessing the download link.



#### Note

Note: Online retrieval of a directory or a link cannot be done. Link and directory-type objects are therefore not visible in this screen.

## 9.2.4. Retrieving to the Retention Zone

The storage policy associated with the collection determines the location where the lot will be stored. Depending on the configuration, the lot might not be available in the retention zone of the Arcsys Transfer Server. In this case, it is only available via the *media manager*.

In these cases, when you click on the *Online Retrieval* button, the following message appears:

*"The lot is no longer located in the online zone. You must retrieve this lot in online mode first to be able to download it using your browser. Followed by the "Back" and "Launch retrieval" buttons.*

When you click on "Launch retrieval", a retrieval request to the retention zone of the Arcsys Transfer Server is created, thus making the lot available for an synchronous retrieval.

*There are two cases where there is no need to retrieve the lot in online zone mode:*

- *If the media manager is ArcMover and the data is stored on a file system managed by the Arcsys Transfer Server, then you get the document directly from the file system if the corresponding option is activated at file system level. In this case, the document is directly extracted from the lot.*
- *If the media manager is Cloud and the data is stored on a zone that can be accessed by the Arcsys Transfer Server, then you get the document directly. In this case, the Arcsys Transfer Server retrieves the envelope of the lot containing the document in its stage directory, and then extracts the requested document.*



### Note

If the lot to retrieve is present on a zone whose media is neither managed by Arcsys, nor managed by a Cloud media manager, then only a full retrieval is possible.

## 9.3. Request List

The screens displaying the requests can be accessed by choosing:

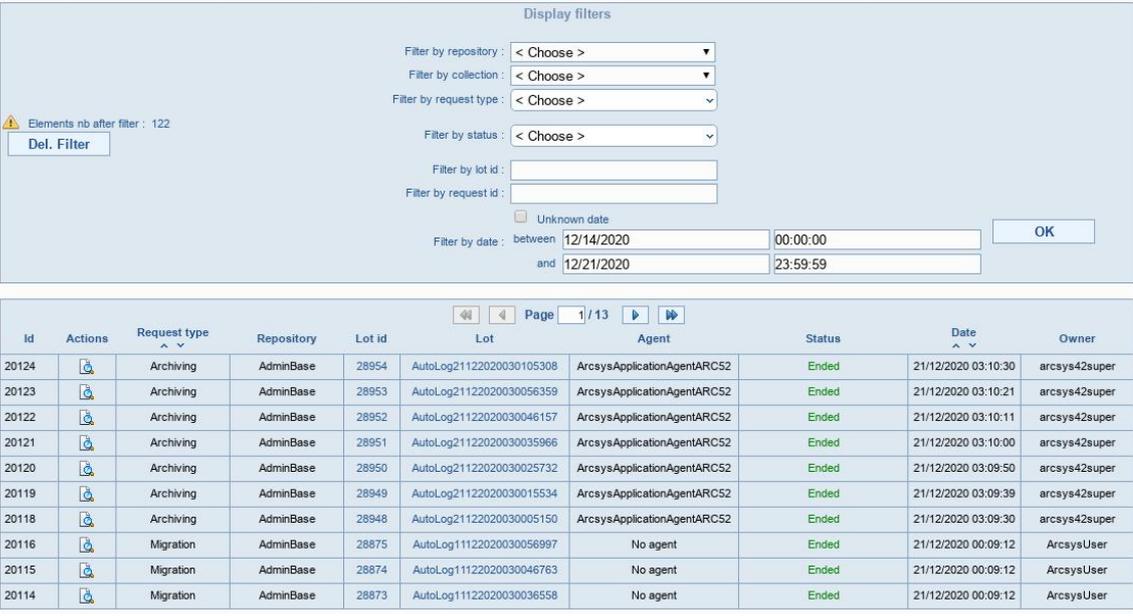
- **Requests** via the Administration menu (without a selected repository; in this case, you can display the requests of all the repositories).
- **See requests** from the **Actions** menu (accessible only if a repository is selected; in this case, only requests from the repository selected appear).

This menu is used to:

- Check if the requests were sent successfully
- Access the list of objects contained in the lots
- View the details of the request

It is possible to filter requests:

- Of a given type
- With a special status
- For a lot identifier
- For a request identifier
- Between two dates and times
- From a tape identifier (only if the request type selected is "**Media migration**")



The screenshot displays the 'Request List' interface. At the top, there is a 'Display filters' panel with several dropdown menus for filtering by repository, collection, request type, and status. Below these are input fields for lot ID and request ID, and a date range filter. A warning icon indicates 'Elements nb after filter : 122'. Below the filters is a table with the following columns: Id, Actions, Request type, Repository, Lot id, Lot, Agent, Status, Date, and Owner. The table contains 10 rows of data, including archiving and migration requests.

Id	Actions	Request type	Repository	Lot id	Lot	Agent	Status	Date	Owner
20124		Archiving	AdminBase	28954	AutoLog21122020030105308	ArcsysApplicationAgentARC52	Ended	21/12/2020 03:10:30	arcsys42super
20123		Archiving	AdminBase	28953	AutoLog21122020030056359	ArcsysApplicationAgentARC52	Ended	21/12/2020 03:10:21	arcsys42super
20122		Archiving	AdminBase	28952	AutoLog21122020030046157	ArcsysApplicationAgentARC52	Ended	21/12/2020 03:10:11	arcsys42super
20121		Archiving	AdminBase	28951	AutoLog21122020030035966	ArcsysApplicationAgentARC52	Ended	21/12/2020 03:10:00	arcsys42super
20120		Archiving	AdminBase	28950	AutoLog21122020030025732	ArcsysApplicationAgentARC52	Ended	21/12/2020 03:09:50	arcsys42super
20119		Archiving	AdminBase	28949	AutoLog21122020030015534	ArcsysApplicationAgentARC52	Ended	21/12/2020 03:09:39	arcsys42super
20118		Archiving	AdminBase	28948	AutoLog21122020030005150	ArcsysApplicationAgentARC52	Ended	21/12/2020 03:09:30	arcsys42super
20116		Migration	AdminBase	28875	AutoLog11122020030056997	No agent	Ended	21/12/2020 00:09:12	ArcsysUser
20115		Migration	AdminBase	28874	AutoLog11122020030046763	No agent	Ended	21/12/2020 00:09:12	ArcsysUser
20114		Migration	AdminBase	28873	AutoLog11122020030036558	No agent	Ended	21/12/2020 00:09:12	ArcsysUser

**Figure 9.5. Request List**

### 9.3.1. Contents of a Lot

To access the display screen for a lot affected by a request (screen Figure 2.16, "Editing a Lot" [31]), click on the name of the lot on the request tracking window.

### 9.3.2. Details of the Request

To view the history of the different statuses held by a request (figure below), click on the icon in the Actions column.

**Characteristics**

Request identifier 506  
 Lot LOT007  
 Lot identifier 825  
 Agent ArcsysApplicationAgentPrimary  
 Engine handling the request ArcsysEnginePrimary  
 Site of the engine handling the request PRIMARY\_SITE  
 Owner arcsys42super  
 Retrieval folder Target source  
 Standard retrieval of objects with a path starting with -  
 Option of path substitution -

**Actions**

Actions	Status	Date
	Initialized	08/10/2021 16:42:49
	Validated	08/10/2021 16:42:49
	Working	08/10/2021 16:42:49
	Proceeded	08/10/2021 16:42:50
	Closed	08/10/2021 16:42:50
	Ended	08/10/2021 16:42:50

**Error message**

Error message	Date
No error	

Figure 9.6. Details of a Retrieval Request

**Characteristics**

Request identifier 35  
 Lot ARCSYSL-10814  
 Lot identifier 17  
 Agent ArcsysApplicationAgentPrimary  
 Engine handling the request ArcsysEnginePrimary  
 Site of the engine handling the request PRIMARY\_SITE  
 Owner arcsys42super  
 Priority 2

**Actions**

Actions	Status	Date
	Initialized	20/08/2021 15:09:02
	Validated	20/08/2021 15:09:02
	Working	20/08/2021 15:09:03
	Proceeded	20/08/2021 15:09:03
	Closed	20/08/2021 15:09:05
	Ended	20/08/2021 15:09:05

**Error message**

Error message	Date
No error	

Figure 9.7. Details of an Archiving or Synchronization Request



## Note

When requests have an error status, the details of this error appear in the history (Figure 9.7, “Details of an Archiving or Synchronization Request” [82]). Error codes, as well solutions, are explained in the Arcsys Errors Manual.



## Note

Certain statuses of a request contain information on the processes performed. You can see this information by clicking on the icon  when the icon is present.

### 9.3.3. Displaying Jobs

A job is a business term that represents a process performed by the Arcsys Transfer Server to archive a lot.

You can access the jobs of a request by clicking on the icon  of the status. The screen for the list of jobs appears.

**Request details**

Fields	Values
Request	505
Lot code	LOT007
Agent	ArcsysApplicationAgentPrimary
Owner of the request	arcsys42super
Request type	Archiving

**Zone COM\_FIRST\_PRIMARY**

Fields	Values
Identifier	4
Code	COM_FIRST_PRIMARY
Media Manager	ArcMover
Creation date	2021-09-17 12:06:41.0

**Job list**

Id	Lot identifier	State of the process	Actions	Num. envelope	Start date	End date	Delay
954	825	✓		Wrap number 1 (manifest)	2021-10-08 16:19:52.0	2021-10-08 16:19:54.0	2 (s)
955	825	✓		Wrap number2	2021-10-08 16:19:52.0	2021-10-08 16:19:54.0	2 (s)

Refresh Back

**Figure 9.8. List of Jobs for a Request**



## Note

Jobs are consolidated by zone on which the lot must be archived. The fixity of the record in a zone is only guaranteed if all the jobs on the zone are successful.



## Important

A job archives an envelope of the record on the zone media. A record has at least two envelopes:

- The first envelope contains the manifest of the record: this file describes the record;
- The other envelope contain record segments.



## Note

Each job has a list of basic actions ('JobActions'), which you can display by clicking on the  icon for jobs.

### 9.3.4. Displaying Job Actions

Job actions are basic processes that the Arcsys Transfer Server can perform to carry out a job.

The screen shown **Figure 9.9, "List of Job Actions for a Job" [84]** displays the job progress in real time.

The **Update** button refreshes the list of job actions.

The screenshot displays a web interface with a sidebar on the left and a main content area. The sidebar contains navigation menus for 'Actions', 'Administration', 'Entitles', and 'Selected elements'. The main content area is titled 'Details of the Job' and contains two tables. The first table lists job details, and the second table lists the job actions in progress.

Fields	Values
Job identifier	954
Request	905
Lot code	LOT007
Lot identifier	825
Wrap number	Manifest (envelope n°1)
Owner of the request	arcsys42super
Zone attached	COM_FIRST_PRIMARY
Start date	2021-10-08 16:19:52.0
End date	2021-10-08 16:19:54.0
Delay	2 (s)
State of the process	✓ (Ended)

Actions list	
Start date	Message
2021-10-08 16:19:52.0	Starting with envelope number [1][2] ([2740] bytes)
2021-10-08 16:19:52.0	Proceeding [1] fragment(s)
2021-10-08 16:19:52.0	Begin open Session for fragment [1]
2021-10-08 16:19:52.0	End open Session for fragment [1]
2021-10-08 16:19:52.0	Begin writing for fragment [1]
2021-10-08 16:19:52.0	End writing for fragment [1]
2021-10-08 16:19:52.0	Begin close Session for fragment [1]
2021-10-08 16:19:52.0	End close Session for fragment [1]
2021-10-08 16:19:52.0	Job ended with return code [0] (0=Successful / Other=Failed)

Buttons: Refresh, Back

**Figure 9.9. List of Job Actions for a Job**

## 9.4. Listing and Selecting Agents

The screens displaying the requests can be accessed by choosing:

- **Agents** from the Administration menu (without selecting a repository):
- **Select Agents** from the main menu (accessible only if a repository is selected).

This menu is used to:

- List and search agents
- Select an agent (only if a repository is selected)

### 9.4.1. List

The following screen (Figure 9.10, “Agent List” [85]) lists the engines registered in the Arcsys Database.

Use the search bar to add filters for the agent names or IDs.



**Figure 9.10. Agent List**

### 9.4.2. Selection

An agent must be selected first in order to associate it to archiving and retrieval operations.

The agents that can be selected are represented by the icon . To select an agent, simply click on this icon. The agent then appears in the "Current selection" field (see Figure 9.10, “Agent List” [85]). To be selected, an agent must be active.

# 10. Permissions Administration

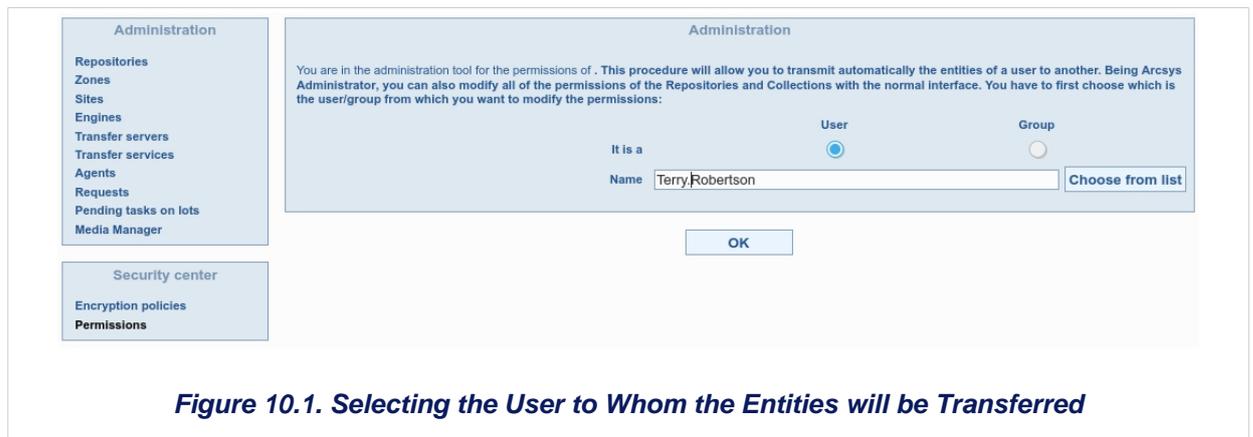
## 10.1. Permissions Administration

With Arcsys, an Administrator user can automatically transfer entities from one user to another.

This section describes the functions Arcsys offers to facilitate this entity transfer.

### 10.1.1. Selecting the User to Whom the Entities will be Transferred

This screen allows the administrator to choose a user (or a group) by selecting in the LDAP of the system (clicking on the "**Choose from a list**" button). It is also possible to enter the name directly (useful if the user is not already in the company's information system).



*Figure 10.1. Selecting the User to Whom the Entities will be Transferred*

### 10.1.2. Displaying the Entities Relative to a User

When the user is selected, the screen shown below lists the entities where the user/group is directly referenced (i.e. a specific permission has been given to the user/group).

Here is the detail of the permissions given to the user 'arcsys42super' :

Select All    Deselect All

Entity	Identifier	Actions	Code	Transfer
Base	4		INSURANCE	<input type="checkbox"/>
Collection	6		BankStatements	<input type="checkbox"/>
Lots	Not given		There is 19 lot(s) referenced by the user.	<input type="checkbox"/>
Collection	5		ACCOUNTING_FLORIDA	<input type="checkbox"/>
Lots	Not given		There is 779 lot(s) referenced by the user.	<input type="checkbox"/>
Base	3		AFP	<input type="checkbox"/>
Collection	3		ARCSYSL-10936	<input type="checkbox"/>
Lots	Not given		There is 5 lot(s) referenced by the user.	<input type="checkbox"/>
Base	2		Test	<input type="checkbox"/>
Collection	4		Migration FS	<input type="checkbox"/>
Lots	Not given		There is 9 lot(s) referenced by the user.	<input type="checkbox"/>
Collection	2		FS_BIS	<input type="checkbox"/>
Lots	Not given		There is 16 lot(s) referenced by the user.	<input type="checkbox"/>

Transfer Automatically

You can decide to transfer automatically the rights of the selected entities or proceed manually by modifying each of the entities

New User :  ...

**Figure 10.2. User Entities List**

- **Individual transfer.** With this screen, you can manually change the repository or collection permissions by clicking on the icon relating to the entity. The administrator thus has read/edit rights over all Arcsys repository/collections.

However, the administrator has no rights over collection lots and cannot individually change the permissions of a given lot.

- **Automatic transfer.** You can automatically transfer permissions by selecting the entity or entities you wish to transfer and by specifying the user to whom you wish to transfer them. As soon as this is done, the **transfer** button performs the permission transfer.

# 11. Media Manager Administration

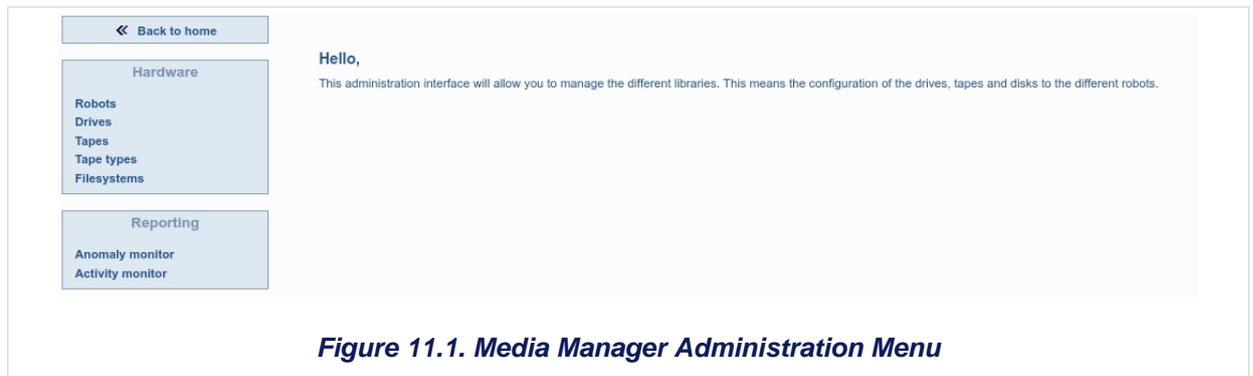
## 11.1. Media Manager Administration

Many Web functions are linked to media manager management and in particular to **ArcMover**, the Arcsys media manager.

To access all these functions, first go to the Media Manager menu by clicking on the **Media Manager** link.

The menu accessing these new functions consists of two parts:

- **Hardware:** Controls the media manager devices.
- **Reporting:** Used to view the events occurring on the devices.



# 12. Hardware Management

## 12.1. Tape library Management

You can access the tape library screens by selecting **Tape library** from the Media Manager Administration menu.



### Important

**This features set can only be used by buying ArcMover Tape Option.**

This screen is used to:

- List the tape libraries detected by Arcsys
- Display the details of a particular tape library
- Lock/Unlock a given tape library.

### 12.1.1. List

The next screen (Figure 12.1, “Tape library List” [90]) lists the tape libraries that the Arcsys Transfer Server has detected.

This screen contains information on each tape library.

*Id*: Arcsys tape library ID

*Online?*: indicates whether the tape library can be accessed by the Arcsys Transfer Server or not

-  The tape library is online
-  The Arcsys Transfer Server is offline or does not recognize the tape library (network failure, hardware problem, etc.)
- *Audit...*: The Arcsys Transfer Server tries to re-establish contact with the tape library

*Lock*: A lock is a means of preventing the application user from using the hardware, whether for archiving or retrieval. Three settings are possible for tape libraries:

-  : Locked, the tape library cannot be used
-  : Unlocked, the tape library can be used

-  *In progress*: The tape library is being locked

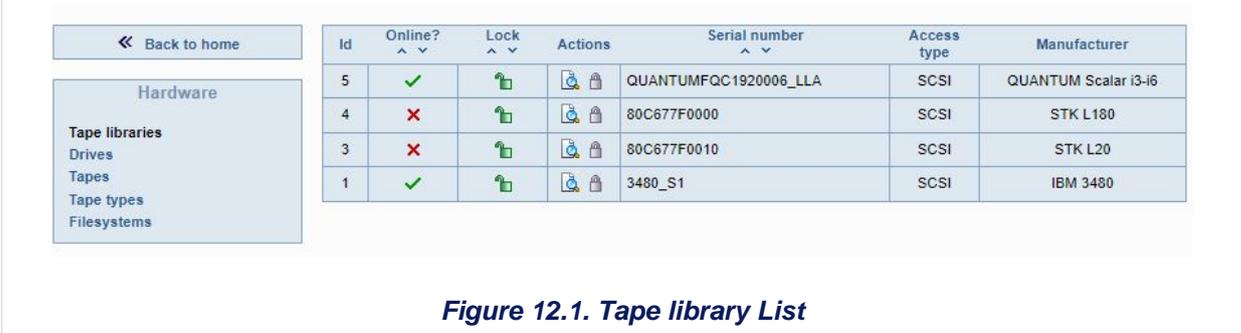
*Actions*: Enables interaction with the tape library

- : Displays tape library details
- : Locks an unlocked tape library
- : Unlocks a locked tape library

*Serial number*: Serial number of the tape library

*Access type*: SCSI

*Manufacturer*: Tape library manufacturer



Id	Online? ^ v	Lock ^ v	Actions	Serial number ^ v	Access type	Manufacturer
5	✓		 	QUANTUMFQC1920006_LLA	SCSI	QUANTUM Scalar i3-i6
4	✗		 	80C677F0000	SCSI	STK L180
3	✗		 	80C677F0010	SCSI	STK L20
1	✓		 	3480_S1	SCSI	IBM 3480

**Figure 12.1. Tape library List**

## 12.1.2. Locking/Unlocking a Tape library

To lock a tape library, click on the icon of the line corresponding to the tape library to lock in the tape library list screen (Figure 12.1, “Tape library List” [90]). Confirmation is required. The tape library is then locked.

To unlock a tape library, click on the icon of the line corresponding to the tape library to unlock in the tape library list screen (Figure 12.1, “Tape library List” [90]). Confirmation is required. The tape library is then unlocked.



### Important

***A locked tape library is no longer recognized by ArcMover.***



### Note

***All the Arcsys Transfer Servers of the site must be stopped and restarted for the change to be taken into account.***

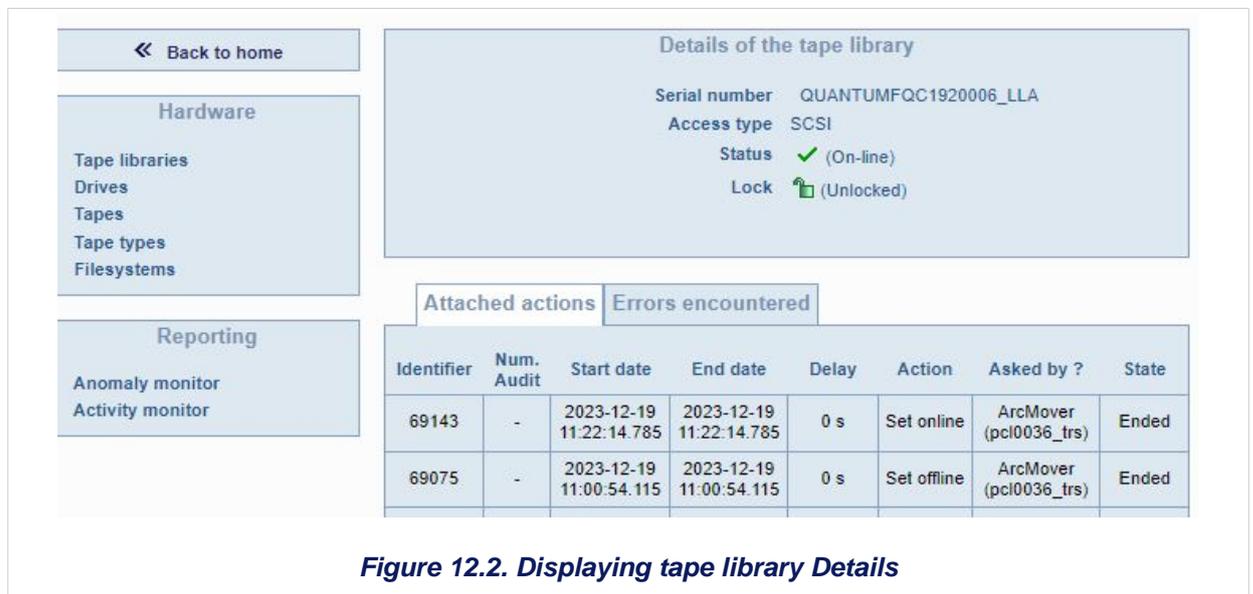
### 12.1.3. Displaying Details

You can access the screen for displaying tape library details by clicking on the icon  in the **Tape libraries** screen.

Several tabs are available:

- *Tape library details*: Gives the overall tape library characteristics
- *Association actions*: Lists the actions taken on a tape library
- *Errors detected*: Lists the errors detected on a library

The details of each tab are explained below.



**Figure 12.2. Displaying tape library Details**

- *Associated actions*: This tab gives the list of actions taken on a tape library. The fields for each of these actions are:
  - **Identifier**: Arcsys action identifier
  - *Audit No*: Associated audit number ('-' if none)
  - **Start date**: Action start date
  - *End date*: Action end date ('-' if not ended)
  - *Duration*: Total duration of the action ('-' if not ended)
  - **Action**: The action requested
  - **Requested by?**: Person who requested the action

- **Status:** The status of the action progress
- **Anomalies detected:** This tab lists the errors detected for a tape library. The fields for each of these errors are:
  - **Identifier:** Arcsys error identifier
  - *Detection date:* Date of error detection by Arcsys
  - *Message:* Message explaining the reasons for this error

## 12.2. Drive Management

You can access the Drive Management screens by selecting **Drives** from the Media Manager Administration menu.



### Important

**This features set can only be used by buying ArcMover Tape Option.**

This screen is used to:

- List the drives for each tape library
- Display the details of a particular drive
- Change certain drive details
- Lock/Unlock a given drive

### 12.2.1. List

The following screen (Figure 12.3, “List of Drives by Tape Library” [93]) lists the drives according to the chosen tape library.

The **Tape library Selection** tab contains information on this tape library.

The **Associated Drives** tab contains information on each of the drives.

*Id:* Arcsys drive ID

*Status:* indicates whether the drive can be accessed by the Arcsys Transfer Server or not

– : The drive is online

– : The Arcsys Transfer Server is offline or does not recognize the drive (network failure, hardware problem, etc.)

– **Audit...**: The Arcsys Transfer Server tries to re-establish contact with the drive

**Lock:** The lock is a means of preventing the application from using the drive. Three settings are possible for drives:

–  : Locked, the drive cannot be used (read/write)

–  : Unlocked, the drive can be used

–  In progress: The drive is being locked

**Actions:** Enables interaction with the drive

– : Displays drive details

– : Modifies certain drive details

–  : Locks an unlocked drive

–  : Unlocks a locked drive

**Serial number:** The serial number of the drive

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Hardware

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Reporting

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[Activity monitor](#)

Choice of the tape library

Fields	Values
Label	STK L180 - 80C677F0000 <span style="float: right;">▼</span>
Manufacturer	STK L180
Access type	SCSI
Status	 (Off-line)
Lock	 (Unlocked)

Attached drives

Identifier	Status	Lock	Actions	Serial number <span style="float: right;">^ v</span>
8			  	80C6700001
9			  	80C6700002
10			  	80C6700003
11			  	80C6700004

**Figure 12.3. List of Drives by Tape Library**

12. Hardware Management

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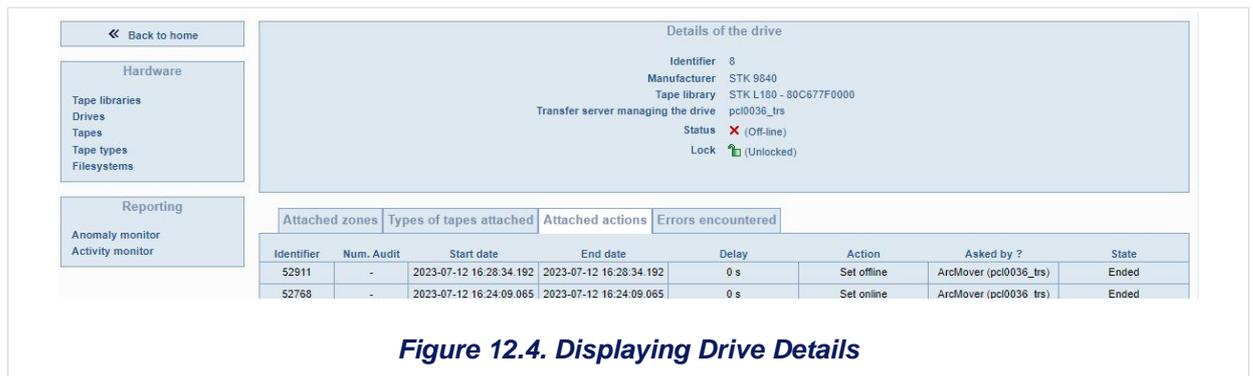
## 12.2.2. Display

You can access the screen for displaying drive details by clicking on the icon  in the **Tape libraries** screen.

Several tabs are available:

- *Drive details*: Gives the overall drive characteristics
- *Attached actions*: Lists the actions taken on a drive
- *Errors encountered*: Lists the errors detected on a drive
- *Types of tapes attached*: Lists the tape types that can be used by the drive
- *Attached zones*: Lists the zones related to a drive

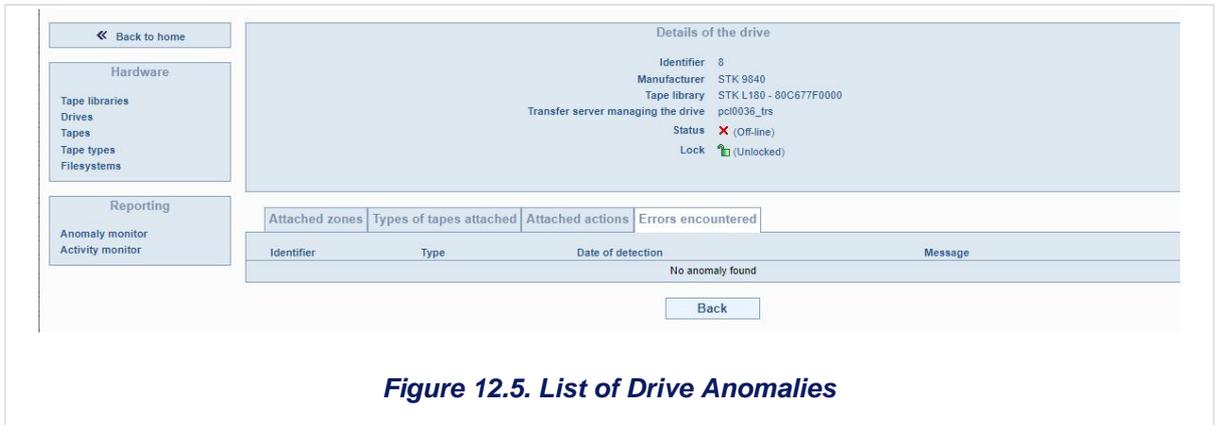
The details of each tab are explained below.



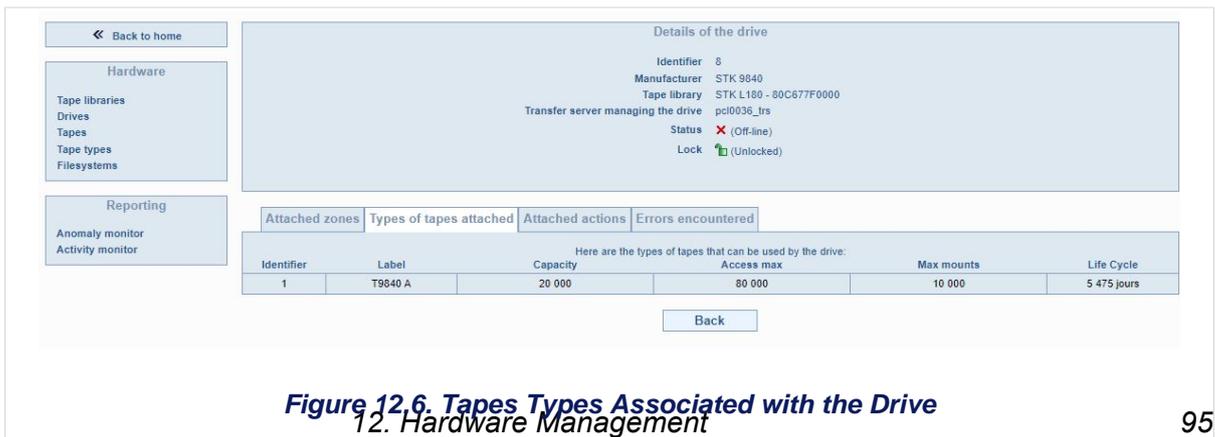
**Figure 12.4. Displaying Drive Details**

- *Attached actions*: This tab gives the list of actions performed on a drive. The fields for each of these actions are:
  - *Identifier*: Arcsys action identifier
  - *Audit No*: Associated audit number ('-' if none)
  - *Start date*: Action start date
  - *End date*: Action end date ('-' if not ended)
  - *Duration*: Total duration of the action ('-' if not ended)
  - *Action*: The action requested
  - *Requested by?*: Person who requested the action
  - *Status*: The status of the action progress

- **Errors encountered:** This tab lists the various errors detected on a drive. The fields for each of these errors are:
  - **Identifier:** Arcsys error identifier
  - **Detection date:** Date of error detection by Arcsys
  - **Message:** Message explaining the reasons for this error



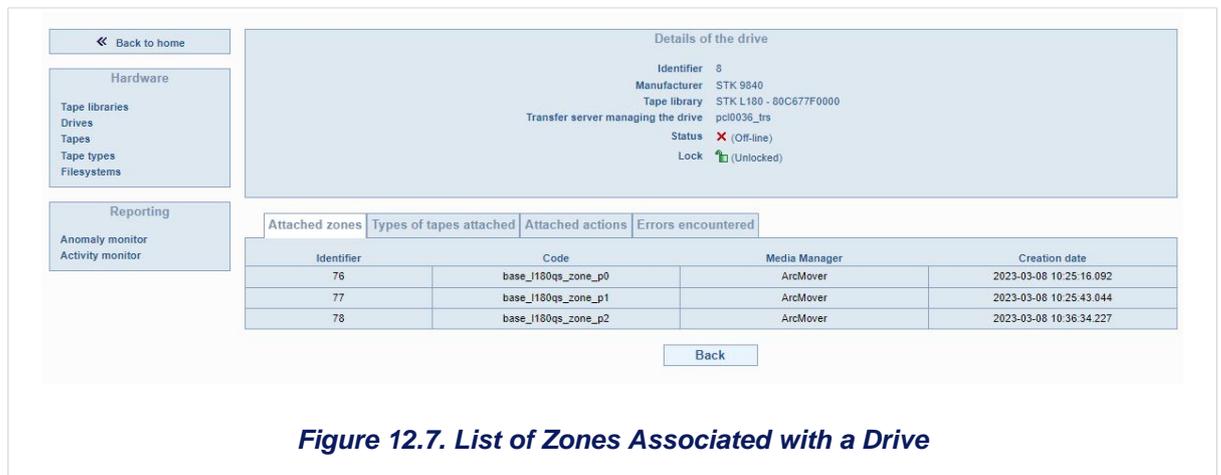
- **Types of tapes attached:** This tab lists the tape types compatible with the drive. The fields for each of these tape types are:
  - **Identifier:** Arcsys tape type identifier
  - **Label:** Tape type name
  - **Capacity:** Maximum capacity of this tape type
  - **Max access:** Maximum number of access for this type of tape
  - **Max mounts:** Maximum number of mounts for this type of type
  - **Service life:** Service life of this tape type



- **Attached zones:** To set the drives to be used for archiving, you must associate zones with this drive. This tab lists the zones associated with this drive.

The fields for each of these zones are:

- **Identifier:** Arcsys zone identifier
- **Code:** Zone code
- **Media manager:** Media manager that manages the zone
- **Creation date:** Creation date of the zone.



**Figure 12.7. List of Zones Associated with a Drive**

- **Locking/Unlocking a Drive:** To lock a drive, click on the icon  of the line corresponding to the drive to lock in the drive list screen (Figure 12.3, “List of Drives by Tape Library” [93]). Confirmation is required. The drive is then locked.

To unlock a drive, click on the icon  of the line corresponding to the drive to lock in the drive list screen (Figure 12.3, “List of Drives by Tape Library” [93]). Confirmation is required. The drive is then unlocked.



### Important

***A locked drive is no longer recognized by ArcMover.***



### Note

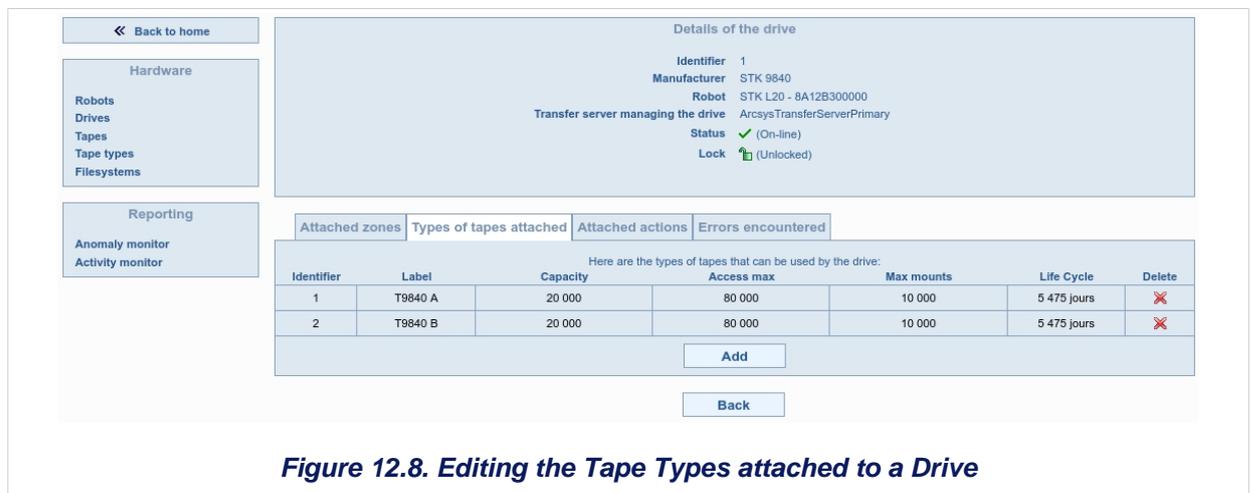
***All the Arcsys Transfer Servers of the site must be stopped and restarted for the change to be taken into account.***

### 12.2.3. Edition

You can access the screen for editing drive details by clicking on the icon in the **Drive** screen.

The same tabs are available as for display. Two tabs are different, however:

- *Types of tapes attached*: This tab lists the tape types compatible with the drive. The tab is also used to add and remove a new tape type for this drive
- *Associated zones*: Lists the zones related to a drive The tab is also used to add or remove a new zone for this drive

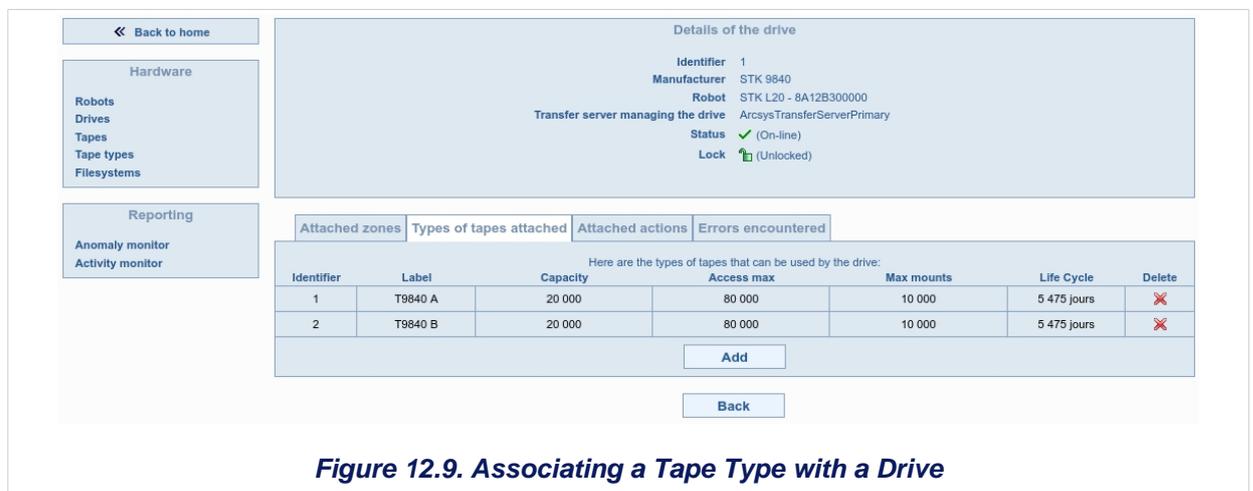


**Figure 12.8. Editing the Tape Types attached to a Drive**

To determine the details of each field, go to the display section.

To each tape type, an icon is associated. Click on this button to display a confirmation window. The tape type is then disconnected from this drive.

The **Add** button connects a new tape type to this drive. This button directs you to the screen below.



**Figure 12.9. Associating a Tape Type with a Drive**

The **Add** button associates the chosen tape type with the list of tape types for the drive.



### Note

A drive can only have the same tape type once. For this reason, only those not yet referenced by the drive are available for selection in the list of tape types.

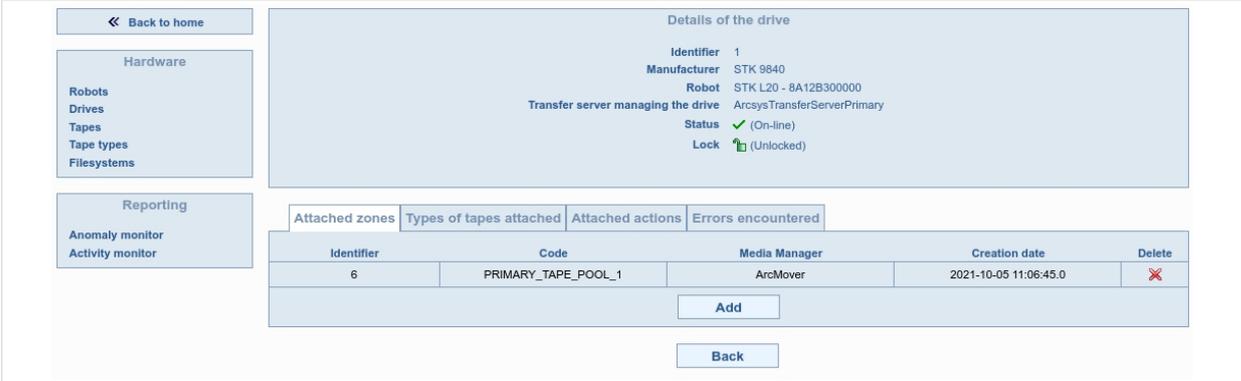


### Note

*When attaching or detaching a tape type from a drive, all the Arcsys Transfer Servers of the site must be stopped and restarted for the changes to be taken into account.*

## 12.2.4. Associated Zones

This tab lists the different zones in which the drive is active.



The screenshot shows the 'Details of the drive' section with the following information:

- Identifier: 1
- Manufacturer: STK 9840
- Robot: STK L20 - 8A12B300000
- Transfer server managing the drive: ArcsysTransferServerPrimary
- Status: ✓ (On-line)
- Lock: 🔒 (Unlocked)

Below this, the 'Attached zones' tab is active, displaying a table:

Identifier	Code	Media Manager	Creation date	Delete
6	PRIMARY_TAPE_POOL_1	ArcMover	2021-10-05 11:06:45.0	✖

Buttons for 'Add' and 'Back' are visible below the table.

**Figure 12.10. Editing the Zones associated to a Drive**

To determine the details of each field, go to the display section.

A delete icon ✖ is associated with each zone. Click on this button to display a confirmation window. The tape type is then disconnected from this drive.

The **Add** button connects a new tape type to this drive. This button directs you to the screen below.

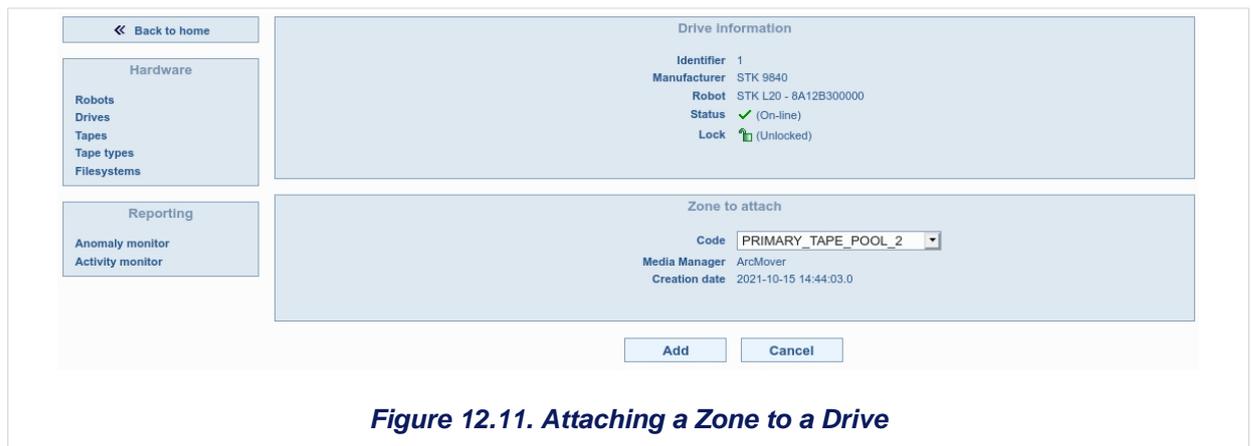


Figure 12.11. Attaching a Zone to a Drive

The **Add** button associates the selected zone with the drive's zone list.



### Note

*A drive can only have the same zone once. For this reason, only those not yet referenced by the drive are available for selection in the list of zones.*



### Note

*When attaching or detaching a zone to/from a drive, all the Arcsys Transfer Servers of the site must be stopped and restarted for the changes to be taken into account.*

## 12.3. Tape Management

You can access the Tape Management screens by selecting **Tapes** from the Media Manager Administration menu.



### Important

**This features set can only be used by buying ArcMover Tape Option.**

This screen is used to:

- List all tape types detected by Arcsys
- Display the tape details
- Edit tapes
- Lock/Unlock tapes
- Exclude tapes
- Suspend/Restart migration of an expired tape

## 12.3.1. Tape List

As the number of tapes can be very high, to accelerate the search for one or more specific tapes, search criteria have been implemented as shown on the screen Figure 12.12, “Tape List” [100].

There are several search types:

- *Search by Arcsys identifier:* If you know the tape identifier you can access directly.
- *Search by barcode:* If you know the barcode you can access directly.
- *Search by criteria:* All tapes fulfilling the required criteria are displayed.

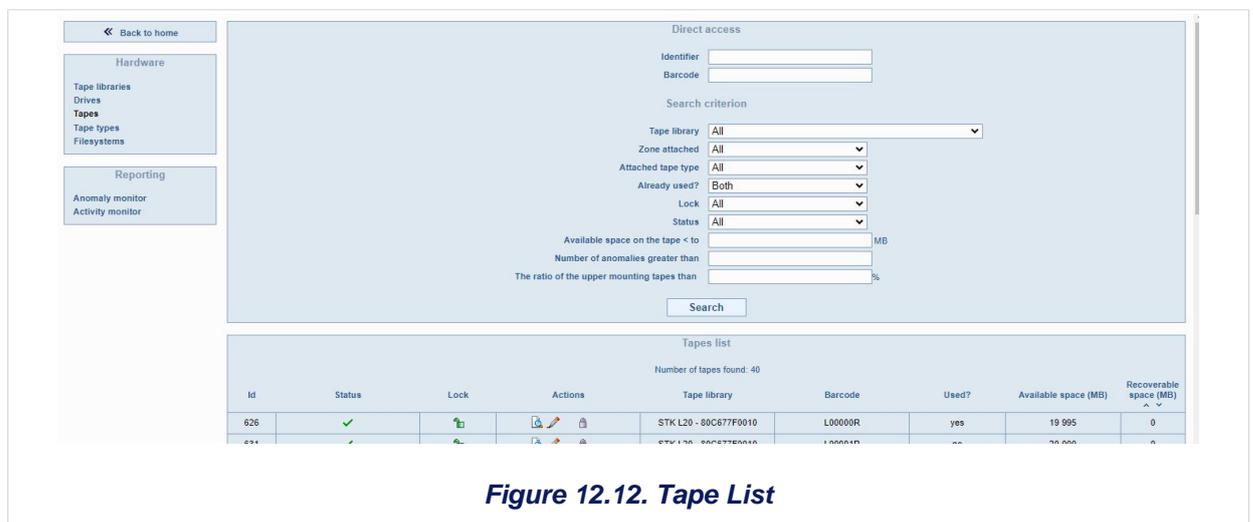


Figure 12.12. Tape List

### 12.3.1.1. Direct access

Direct access with the Arcsys tape identifier: If you know the identifier of the tape you want to access, you can enter it in the **Identifier** field of the **Direct Access** tab, then click on the **Search** button just to the right.

The tape then appears in the **Tape List** tab.

Direct access with the tape barcode: If you know the barcode of the tape you want to access, you can enter it in the **Barcode** field of the **Direct Access** tab, then click on the **Search** button just to the right.

The tape then appears in the **Tape List** tab.

### 12.3.1.2. Search Criterion

The search criteria are:

- *Tape library*: Only the tapes associated with this tape library are displayed.
- *Associated zone*: Only the tapes associated with this zone are shown.
- *Associated tape type*: Only the tapes detected as having the same type are displayed.
- *Already used?*:
  - *Yes*: Only tapes containing lots are displayed
  - *No*: Only empty tapes are displayed
  - *Both*: No filtering on this criterion
- *Lock*:
  - *All*: No filter on this criterion
  - *Locked*: Only locked tapes are displayed
  - *Unlocked*: Only unlocked tapes are displayed
  - *Locking*: Only tapes being locked are displayed
  - *Excluded*: Only excluded tapes are displayed
  - *Unknown*: Only tapes with an unknown lock are displayed
- *Status*:
  - *All*: No filter on this criterion
  - *Online*: Only online tapes are displayed
  - *Off-line*: Only offline tapes are displayed
  - *Audit*: Only tapes in audit mode (their status is pending detection by the Arcsys Transfer Server) are displayed
  - *In migration*: Only tapes being migrated are displayed
  - *Expired*: Only expired tapes are displayed
  - *Migration suspended*: Only tapes whose migration has been suspended are displayed
- *Space remaining on tape*: Only tapes with remaining space less than that specified in this field are displayed (if this field is empty, there is no filter on this criterion).

Once the search criteria are fulfilled (by default, these criteria are set to find all tapes), click on the **Search** button in the **Search Criteria** tab to start the search.

The list of tapes fulfilling these criteria is then displayed in the **Tape List** tab (see below).

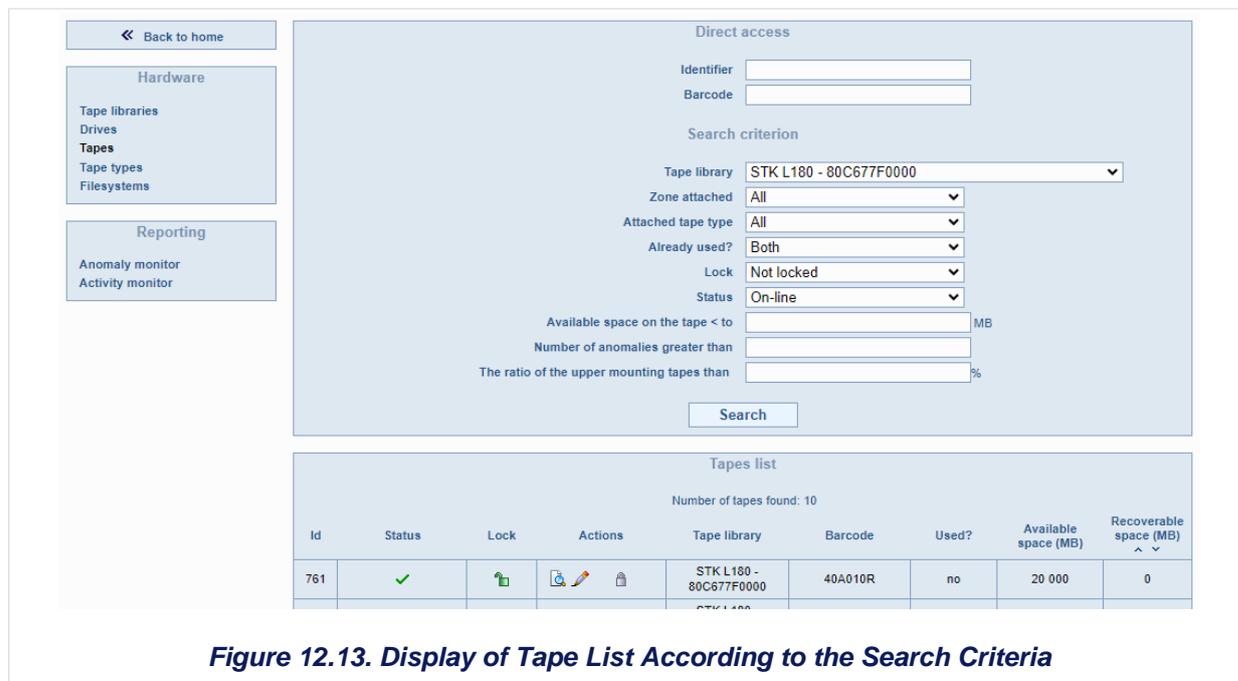


Figure 12.13. Display of Tape List According to the Search Criteria

### 12.3.1.3. Tapes List tab

The **Tapes List** tab contains information on each of the tapes.

*Id*: Arcsys Tape identifier

*Status*: Status of the tape

- The tape is online
- The Arcsys Transfer Server does not recognize the tape (network failure, hardware problem, etc.)
- *Audit...* The Arcsys Transfer Server tries to re-establish contact with the tape
- *In migration*: The tape is considered expired and its migration is in progress
- *Expired*: The tape is expired and can no longer be used by Arcsys
- : The tape is expired, but its migration has been manually suspended

*Lock*: The lock is a mean of preventing the application from using a tape in write mode. Five settings are possible for tapes:

-  : Locked, The tape cannot be used for writing
-  : Unlocked, the tape can be used
-  *In progress*: The tape is being locked
- *Excluded*: The tape has been excluded and cannot be used by Arcsys
- *Unknown*: The tape cannot be used for the moment because a user has not determined if it should be managed by Arcsys.

*Actions*: Allows interaction with the tape

-  : Displays tape details
-  : Modifies certain tape details
-  : Locks an unlocked or unknown tape
-  : Unlocks an locked or unknown tape
-  : Excludes an unknown tape
-  : Suspends migration
-  : Resumes a tape migration

*Tape library*: The tape library managing this tape

*Barcode*: The tape barcode

*Used?*: No, if the tape is empty; otherwise yes

*Space remaining*: Space remaining on the tape

*Recoverable space*: Recoverable space on the tape (via recycling)

*Compression*: Files compressed on the tape

## 12.3.2. Locking/Unlocking a Tape

To lock a tape, click on the icon of the line corresponding to the tape to lock in the tape list screen (). Confirmation is required. The tape is then locked.

To unlock a tape, click on the icon of the line corresponding to the tape to unlock in the tape list screen (). Confirmation is required. The tape is then unlocked.



## Note

*A locked tape cannot be used in write mode, but it remains usable in read mode.*



## Note

*When locking or unlocking a tape, all the Arcsys Transfer Servers of the site must be stopped and restarted for the change to be taken into account.*

### 12.3.3. Excluding a Tape

If a tape has an "Unknown" lock, you can notify Arcsys that the ArcMover media manager must not manage it.

To switch the tape to "Excluded" status, click on the icon . This tape can then no longer be used by ArcMover.

Confirmation is required.

Suspending/restarting tape migration: To suspend migration of a tape, click on the icon of the line corresponding to the tape whose migration is to be suspended in the tape list screen (). Confirmation is required. Migration is then stopped. This action will not be taken into account until the launch of the next tape migration process.

To resume migration of a tape, click on the icon of the line corresponding to the tape whose migration is to be resumed in the tape list screen (). Confirmation is required. Tape migration is re-activated. This action will not be taken into account until the launch of the next tape migration process.



## Note

*A tape whose migration is in progress or suspended cannot be used in write mode but remains available in read mode. If the tape contains disposal holds, these are also migrated.*

### 12.3.4. Display

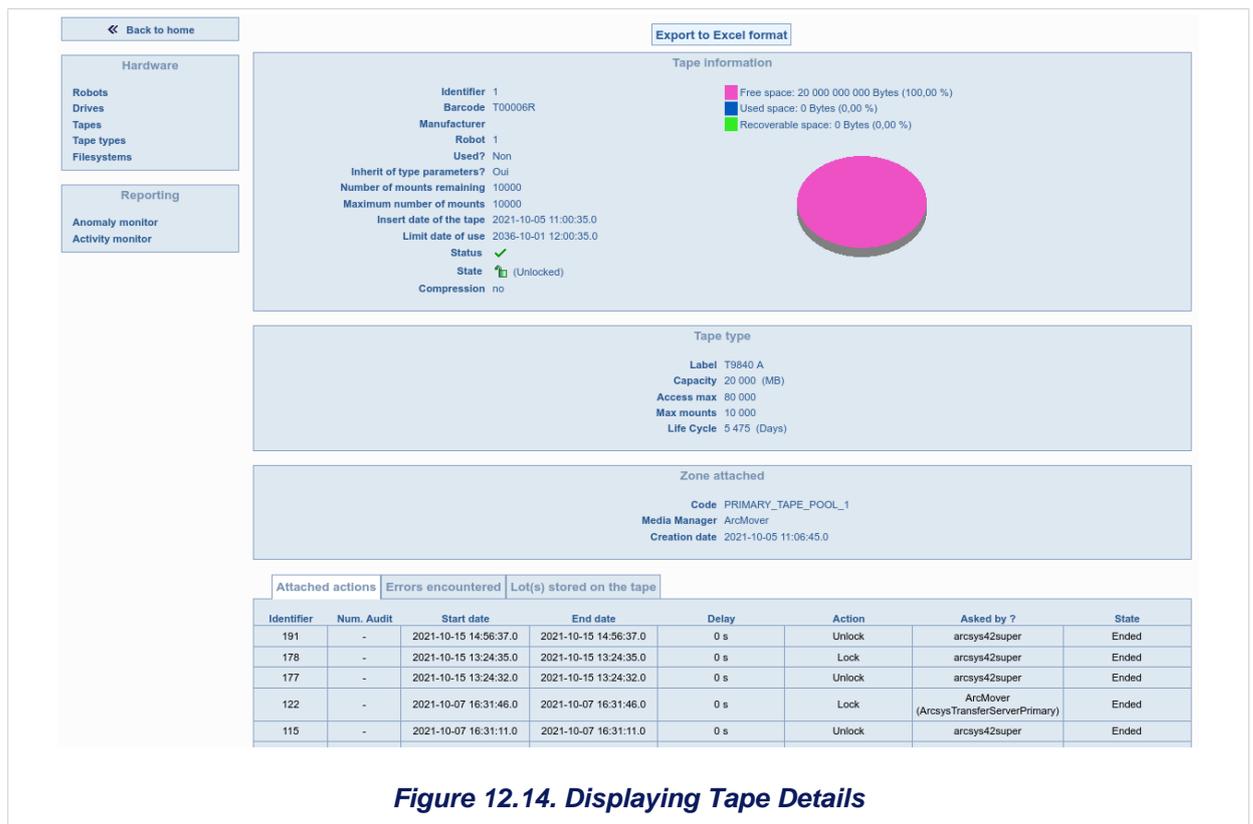
You can access the screen for displaying tape details by clicking on the icon  in the **Tape** screen.

Several tabs are available:

- *Tape details*: Displays the general details of the tape

- *Association actions*: Lists the actions taken on the tape
- *Anomalies detected*: Lists the errors detected on the tape
- *Associated tape types*: Lists the tape types that can be used by the drive
- *Associated zones*: Lists the zones related to a drive

The details of each tab are explained below.



**Figure 12.14. Displaying Tape Details**

- *Tape information*: This tab displays general details of a tape. The fields that do not appear in the **Tape List** screen are:
  - *Manufacturer*: Tape manufacturer
  - *Tape insertion date*: Date on which the Arcsys Transfer Server detected the tape
  - *Number of accesses remaining*: The number of accesses remaining to guarantee the quality of the tape and thus the integrity of the records
  - *Number of mounts remaining*: The number of mounts remaining to guarantee the quality of the tape and thus the integrity of the records
  - *Expiration date*: Date beyond which the manufacturer cannot guarantee the integrity of the data on the tape

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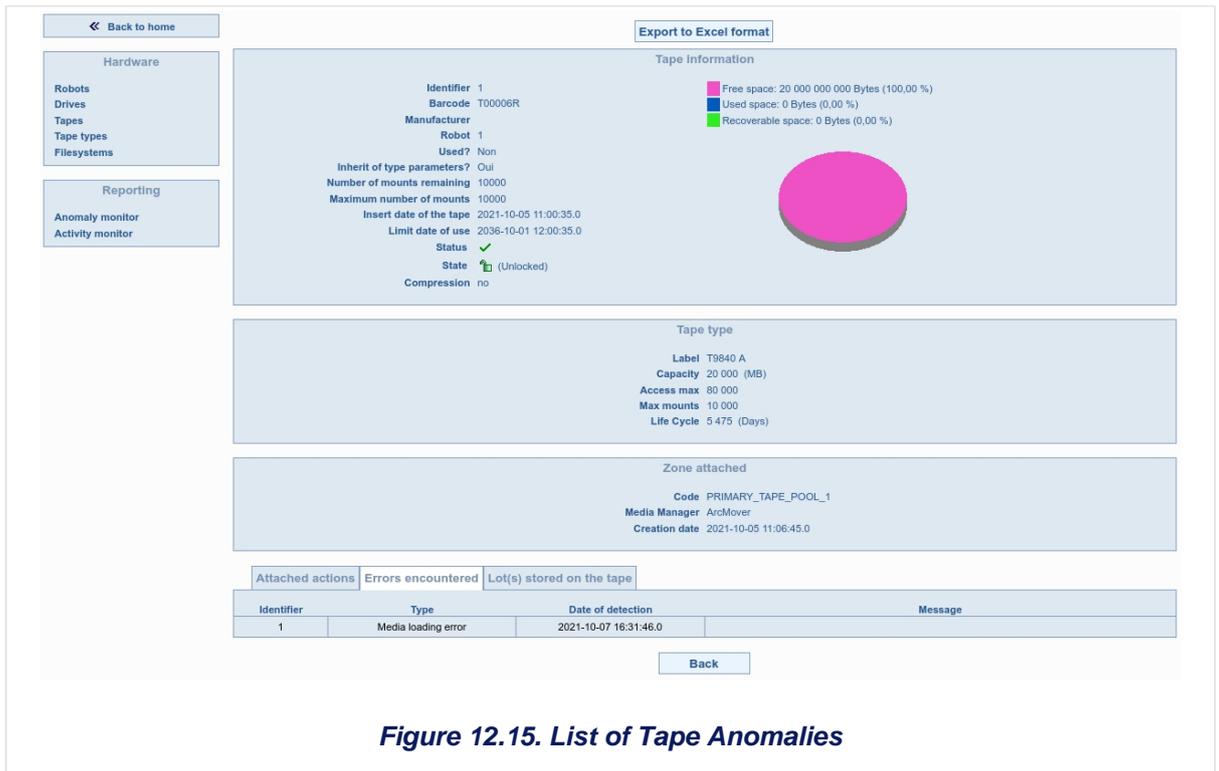
- **Status:** Status of the tape. If the status is "in migration" or "migration suspended", the progress status is displayed (Number of lots processed/Number of lots present on the tape).

To the left, a diagram representing the occupied status of the tape with the amount of space occupied, the recoverable space (occupied by lots reaching scheduled end of retention date) and the remaining space.

- **Tape type:** This tab represents the tape type with which this tape is associated. Certain tape fields depend directly on the tape type to which it is attached.
- **Associated zones:** This tab details the zone with which this tape type is associated. During all archiving/migration/retrieval or archive restitution operations of a lot in this zone, the tape can be used.
- **Associated actions:** This tab gives the list of actions performed on the tape. The fields for each of these actions are:
  - **Identifier:** Arcsys action identifier
  - **Audit No:** Associated audit number ('-' if none)
  - **Start date:** Action start date
  - **End date:** Action end date ('-' if not ended)
  - **Duration:** Total duration of the action ('-' if not ended)
  - **Action:** The action requested
  - **Requested by?:** Person who requested the action
  - **Status:** The status of the action progress
- **Detected anomalies:** This tab lists the errors detected on the tape.

The fields for each of these errors are:

- **Identifier:** Arcsys error identifier
- **Detection date:** Date of error detection by Arcsys
- **Message:** Message explaining the reasons for this error

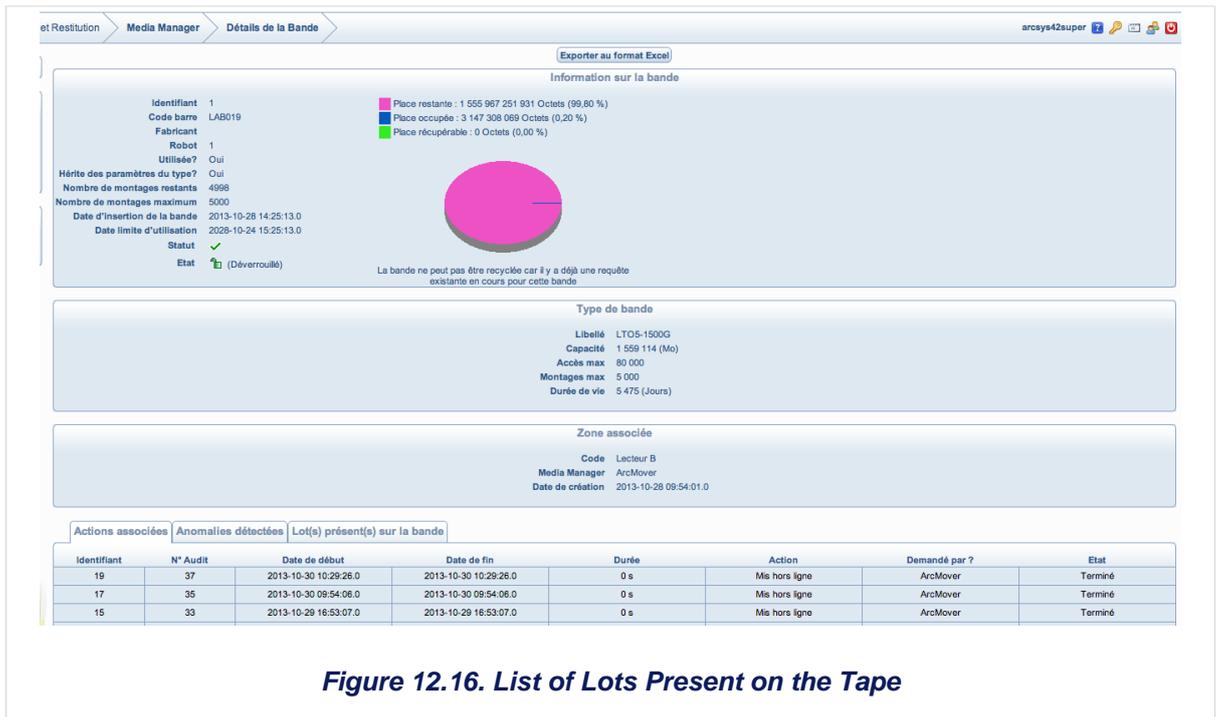


**Figure 12.15. List of Tape Anomalies**

- **Lots present on the tape:** This tab lists the lots detected on the tape. A lot might not be entirely archived on a single tape. The list of lots displayed in reality represents the lots with envelopes (group of files) on the tape.

The fields for each of these lots are:

- **Identifier:** Arcsys lot identifier
- **Size:** Lot size
- **Repository code:** Code of the repository in which the lot is located
- **Collection code:** Code of the collection in which the lot is located
- **Lot code:** Lot code



**Figure 12.16. List of Lots Present on the Tape**

### 12.3.5. Edition

You can access the screen for editing a tape by clicking on the icon of the tape you want to modify.

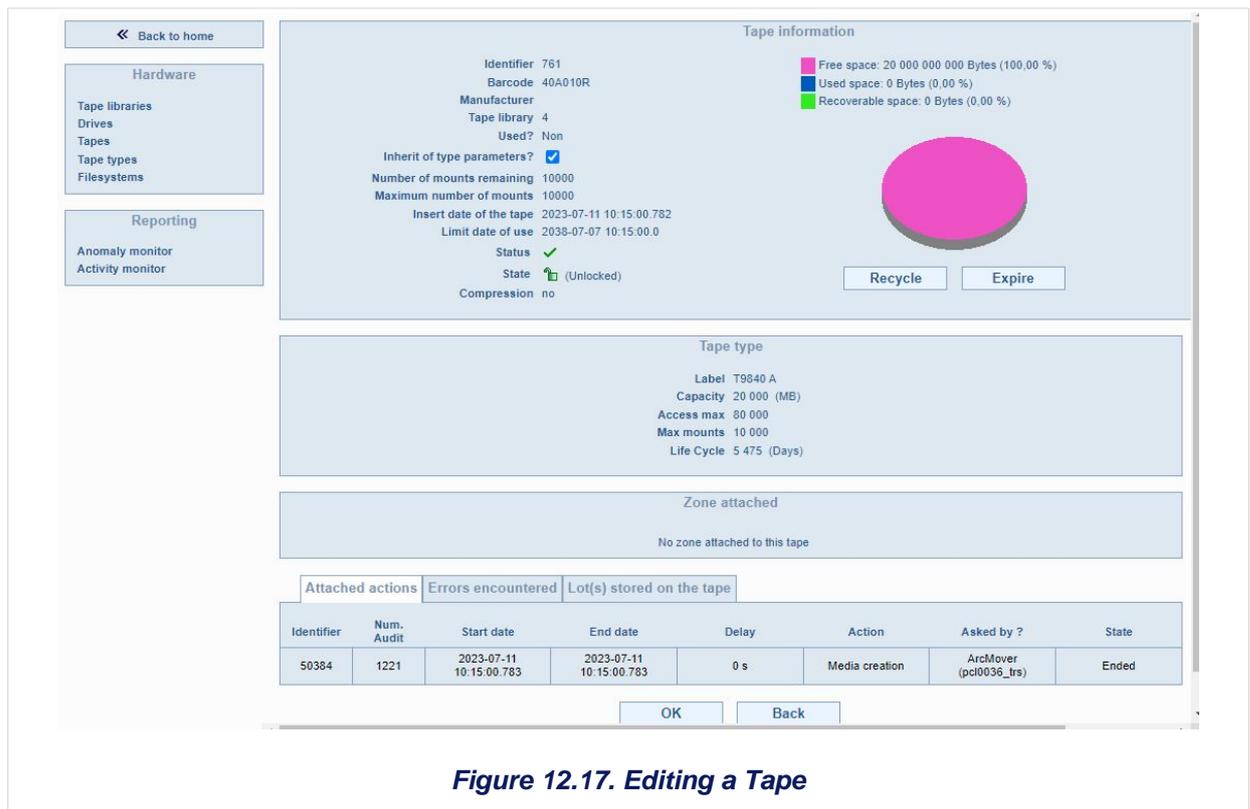


Figure 12.17. Editing a Tape

The same tabs are available as for display, but there are also two buttons available:

- **Recycle:** Execute a recycling request, which leads to the migration of all the lots that have not reached the scheduled end of retention date to another tape followed by tape formatting. The source tape is reset as blank;
- **Expire:** Execute a media migration request, which, as for recycling, leads to the migration of all the lots that have not reached the scheduled end of retention date to another tape followed by tape formatting. However, the source tape is no longer usable.

Two tabs are also present:

- **Tape types:** This tab represents the tape type with which this tape is associated.

For details on the fields, go to the paragraph on displaying tape details.

- **Associated zone:** The zone associated with this tape

For details on the fields, go to the paragraph on displaying tape details.

## 12.4. Managing Tape Types

You can access the Tape Type Management screens by selecting **Tape Types** from the Media Manager Administration menu.



## Important

This features set can only be used by buying ArcMover Tape Option.

This screen is used to:

- List all tape types managed by Arcsys
- Display tape type details
- Edit tape types

### 12.4.1. Tape Type List

All tape types managed by Arcsys are listed.

Tape types list							
Number of tape types found: 45							
Id	Actions	Label	Capacity (MiB)	Maximum authorized access number	Maximum authorized mount number	Life-cycle (Days)	Recycling threshold (%)
45		E07-JY	3 814 697	10 000	5 000	10 950	100.0
44		E07-JC	3 814 697	10 000	5 000	10 950	100.0
43		LTO8-12.0W	11 444 091	80 000	5 000	5 475	100.0
42		LTO8-12.0T	11 444 091	80 000	5 000	5 475	100.0
41		LTO7-6.0W	5 722 045	80 000	5 000	5 475	100.0
40		LTO7-6.0T	5 722 045	80 000	5 000	5 475	100.0
39		E06-JX	953 674	10 000	5 000	10 950	100.0
38		E06-JB	953 674	10 000	5 000	10 950	100.0
37		E06-JW	610 351	10 000	5 000	10 950	100.0
36		E06-JA	610 351	10 000	5 000	10 950	100.0

**Figure 12.18. Tape Type List**

The **Tape Type Management** screen contains information on each tape type.

*Id*: Arcsys tape type identifier

*Actions*: Allows interaction with the tape type

– : Displays tape type details

– : Edits certain tape type details

*Label*: Name of the tape type

*Capacity*: Capacity of tape type

**Maximum number of accesses allowed**: Maximum number of accesses authorized for this media

*Maximum number of mounts allowed:* Maximum number of mounts authorized for this media

**Service life:** Length of service life for this media type

## 12.4.2. Display

You can access the screen for displaying tape type details by clicking on the icon  in the **Tape Type Management** screen.



**Figure 12.19. Displaying Tape Type Details**

The **Display Tape Type** screen contains information on each of the tapes.

*Label:* Name of the tape type

**Capacity:** Capacity of tape type

*Maximum number of accesses allowed:* Maximum number of accesses authorized for this media

*Maximum number of mounts allowed:* Maximum number of mounts authorized for this media

**Service life:** Length of service life for this media type

The link " Tapes associated with this type" displays the list of tapes associated with this type.

## 12.4.3. Edition

You can access the screen for editing tape type details by clicking on the icon  in the **Tape types** screen. This screen is identical to the display screen, except that the fields for "Maximum number of accesses allowed", "Maximum number of mounts allowed" and "Service life" can be modified.



Figure 12.20. Changing Tape Type Details

## 12.5. Managing File Systems

You can access the Drive Management screens by selecting **File Systems** from the Media Manager Administration menu.

This screen is used to:

- List all file systems created
- Create file systems
- Display file system details
- Edit file systems
- Lock/Unlock file systems.

### 12.5.1. File System List

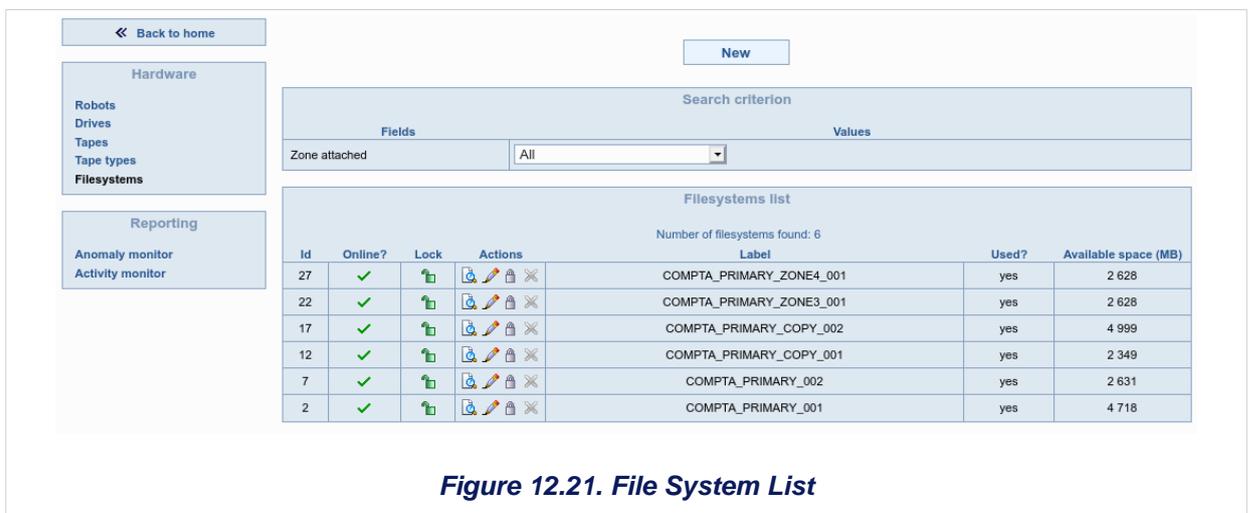


Figure 12.21. File System List

The **File System List** tab contains information on each of the file systems.

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*Id*: File system identifier

*Online?*: the online status is carried by the association with a Arcsys Transfer Server. The general status of a file system may be:

-  : online when all its associated Arcsys Transfer Servers are online and can access the media
-  : offline when none of its associated Arcsys Transfer Servers can access the media. This can occur when the Arcsys Transfer Servers are off or do not recognize the file system (network failure, hardware problem, incorrect path, etc.)
-  : partially online, otherwise. It can be accessed by at least one of its associated Arcsys Transfer Servers, but at least one of them does not have access to it.

*Lock*: A lock is a means of preventing the application of writing to the file system, but the application can still read data from it. Two settings are possible for file systems:

-  : Locked, the file system cannot be used for writing.
-  : Unlocked, the file system can be used

*Actions*: Enables interaction with the file system

-  : Displays file system details
-  : Modifies certain file system details
-  : Locks a file system
-  : Unlocks a file system

*Label*: The name given to the file system

*Used?*: No, if the file system is empty; otherwise yes

*Space remaining*: Space remaining on the file system

*Compression*: Percentage of compression if the file system is compressed

## 12.5.2. Search Criteria

You can filter file systems according to their association with a particular zone.

To do this, simply change the values in the drop-down menu in the **File System Management** screen; the new list appears automatically.



## Note

Not all the zones appear in the drop-down menu. This is normal: Only the zones using the **ArcMover** media manager and that are **Disk** type can be associated with a file system.

### 12.5.3. Creating a File System

Click the **New** button at the top of the page to access the page for creating a new file system.

**Figure 12.22. Creating a File System**

**Label:** The label you wish to give a file system.

**Zone:** A disk zone which will be associated with this file system.

**Capacity:** The capacity you wish to allocate to a file system. The unit can be selected from a drop-down list (TB, MB, GB, bytes).

**Number of Simultaneous Accesses:** The maximum number of simultaneous accesses allowed for the file system. This number is used by ArcMover to parallelize read/write operations on the file system.

**Lock:** The initial state desired for the file system.

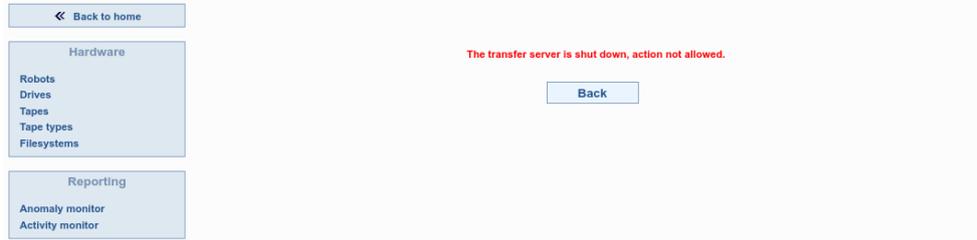
**Authorize direct access for synchronous retrieval:** During synchronous retrieval, if the Arcsys Transfer Server is on the same site as the file system, this option authorizes direct access to the file system when the file is not present either in the cache zone or in the synchronous retrieval zone. You are advised not to use this option when the file system in question is an NFS mount (slow access).

**WORM disk access type:** Specifies if the file system is WORM (Write Once, Read Many). This type of media allows data writing but not deletion. It is thus possible to write once and read as many times as needed without ever being able to physically delete the written data.



## Note

To create a file system, the Arcsys Transfer Server must be running. If it is not, the action is not authorized and a message appears:



### 12.5.4. Locking/Unlocking a File System

To lock a file system, click on the icon  of the line corresponding to the file system to lock the file systems list screen. Confirmation is required. The file system is then locked.

To unlock a file system, click on the icon  of the line corresponding to the file system to unlock in the file systems list screen. Confirmation is required. The file system is then unlocked.



## Note

You cannot write to a locked file system, but you can still read from it.



## Note

To lock/unlock a file system, the Arcsys Transfer Server must be running. If it is not, the action is not authorized and a message appears:



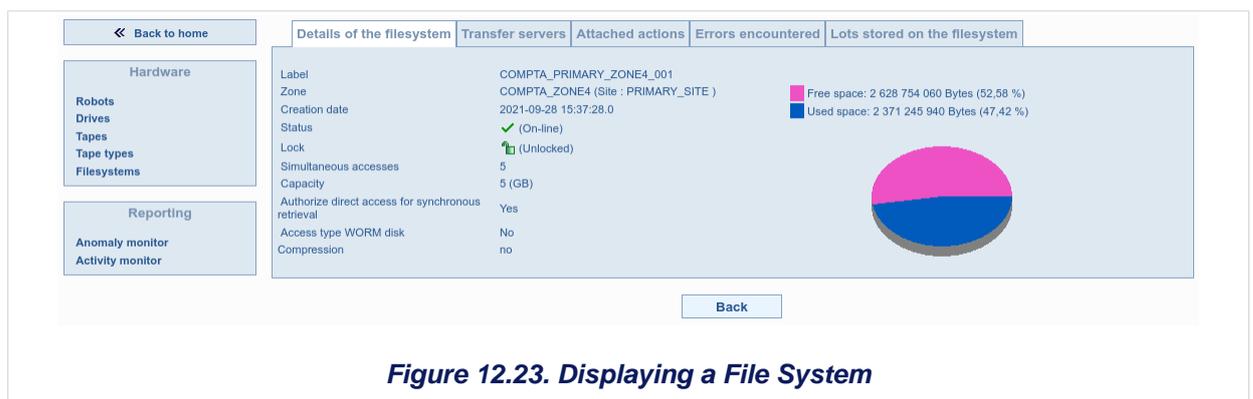
### 12.5.5. Display

You can access the screen for displaying the details of a drive by clicking on the icon  in the **File System Management** screen.

Several tabs are available:

- *Details of the filesystem*: Displays the overall details of the filesystem
- *Transfer servers*: Lists the transfer servers associated with the filesystem
- *Attached actions*: Lists the actions taken on the filesystem
- *Errors encountered*: Lists the errors detected on the filesystem
- *Lots stored on the filesystem*: Lists the lots that are stored on the filesystem

The details of each tab are explained below.



**Figure 12.23. Displaying a File System**

### 12.5.5.1. Details of the filesystem

This tab shows the general details of a file system. The fields that do not appear in the **File System List** screen are:

- *Capacity*: Number of bytes allocated to a file system
- *Zone*: Zone associated with this file system
- *Creation date*: Date when a user created this file system

### 12.5.5.2. Transfer Servers

This tab gives the list of transfer servers associated with the file system.

The fields for each of these transfer servers are:

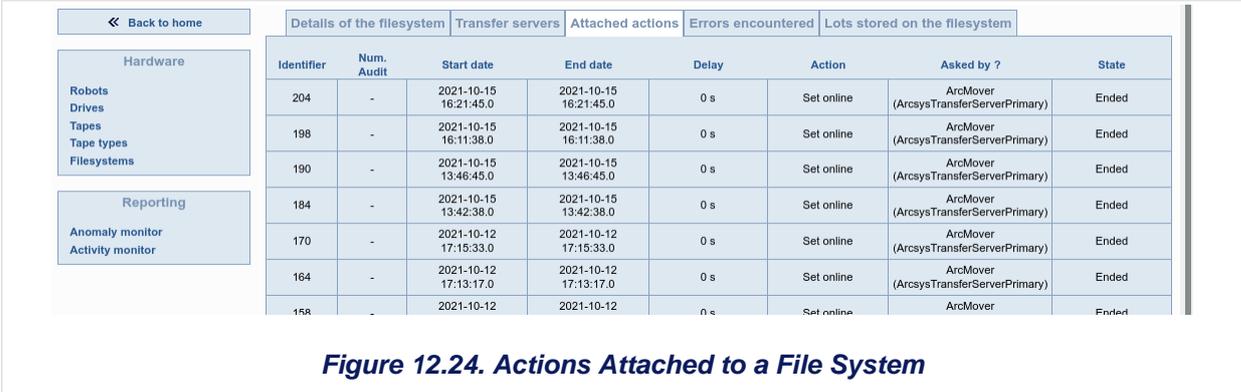
- *Arcsys Transfer Server code*: Identifier code of the Arcsys Transfer Server
- *Path*: Mount point of the file system on the associated transfer server

### 12.5.5.3. Attached actions

This tab gives the list of actions performed on a file system.

The fields for each of these actions are:

- *Identifier*: Arcsys action identifier
- *Audit No*: Associated audit number ('-' if none)
- *Start date*: Action start date
- *End date*: Action end date ('-' if not ended)
- *Delay*: Total duration of the action ('-' if not ended)
- *Action*: The action requested
- *Asked by?* : Person who requested the action
- *State*: The state of the action progress



Identifier	Num. Audit	Start date	End date	Delay	Action	Asked by ?	State
204	-	2021-10-15 16:21:45.0	2021-10-15 16:21:45.0	0 s	Set online	ArcMover (ArcsysTransferServerPrimary)	Ended
198	-	2021-10-15 16:11:38.0	2021-10-15 16:11:38.0	0 s	Set online	ArcMover (ArcsysTransferServerPrimary)	Ended
190	-	2021-10-15 13:46:45.0	2021-10-15 13:46:45.0	0 s	Set online	ArcMover (ArcsysTransferServerPrimary)	Ended
184	-	2021-10-15 13:42:38.0	2021-10-15 13:42:38.0	0 s	Set online	ArcMover (ArcsysTransferServerPrimary)	Ended
170	-	2021-10-12 17:15:33.0	2021-10-12 17:15:33.0	0 s	Set online	ArcMover (ArcsysTransferServerPrimary)	Ended
164	-	2021-10-12 17:13:17.0	2021-10-12 17:13:17.0	0 s	Set online	ArcMover (ArcsysTransferServerPrimary)	Ended
158	-	2021-10-12	2021-10-12	0 s	Set online	ArcMover	Ended

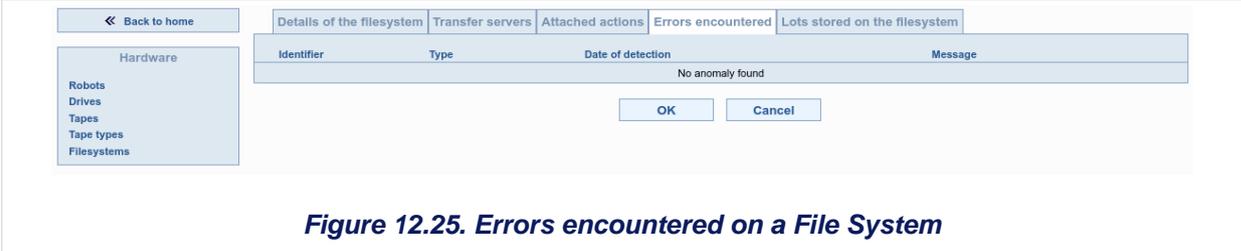
**Figure 12.24. Actions Attached to a File System**

### 12.5.5.4. Errors encountered

This tab lists the various errors encountered on a File System.

The fields for each of these errors are:

- *Identifier*: Arcsys error identifier
- *Detection date*: Date of error detection by Arcsys
- *Message*: Message explaining the reasons for this error



Identifier	Type	Date of detection	Message
No anomaly found			

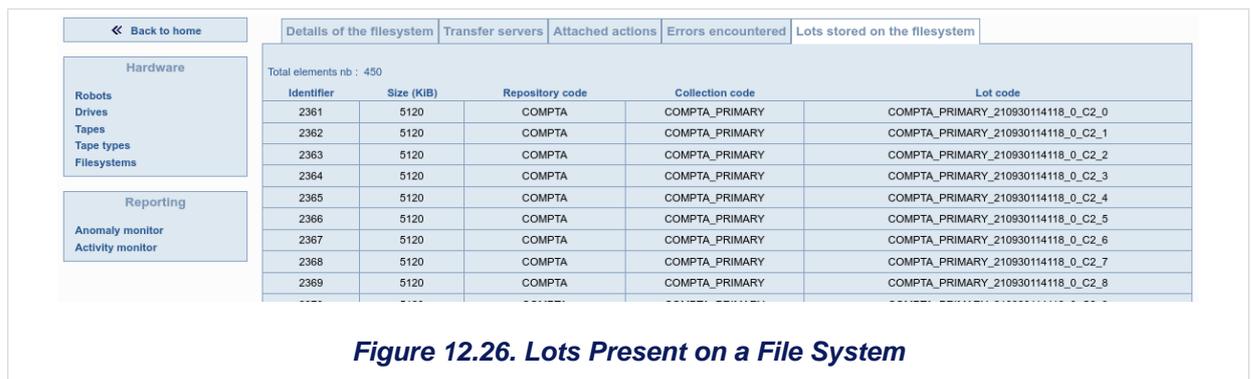
**Figure 12.25. Errors encountered on a File System**

### 12.5.5.5. Lots stored on the filesystem

This tab lists the lots detected on the file system. A lot might not be entirely archived on the same file system. The list of lots displayed in reality represents the lots possessing envelopes (set of files) on the file system.

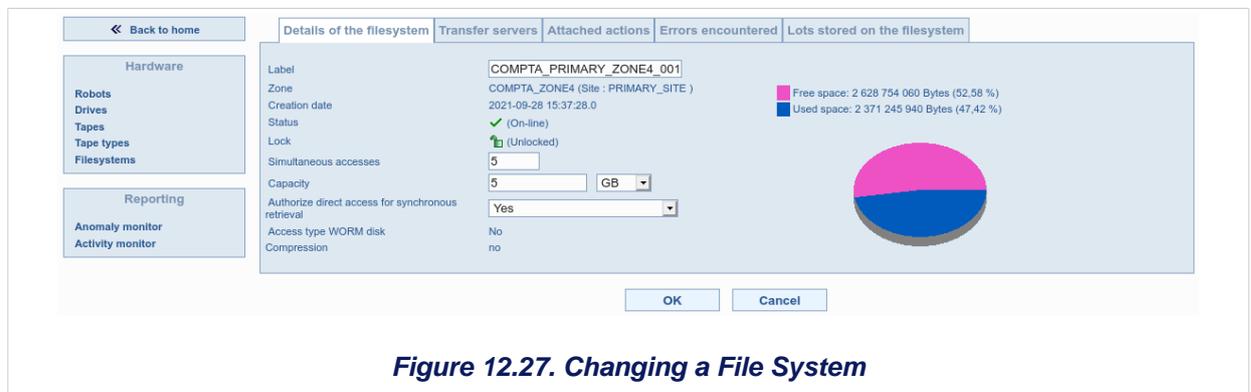
The fields for each of these lots are:

- *Identifier*: Arcsys lot identifier
- *Size*: Lot size
- *Repository code*: Code of the repository in which the lot is located
- *Collection code*: Code of the collection in which the lot is located
- *Lot code*: Lot code



### 12.5.6. Edition

You can access the screen for editing a file system by clicking on the icon  of the file system you want to modify.



For the details of the fields, go to the **Creating a File System** section.

When editing a file system, you cannot modify the **Zone** and *WORM disk access type* fields. You can, however, edit the "Label", "Capacity", "Simultaneous Access" and "Authorize direct access for synchronous retrieval" fields.

If you try to reduce the capacity of the file system below the size occupied by the records on the file system, an error message appears.

The **Associated transfer servers** tab is used to add transfer servers with a file system path on each of them, as well as to change the paths of the file system for the transfer servers added previously.



The **Associated Actions**, **Anomalies Detected** and *Lots present on the disk* tabs are the same for displaying a file system. See this section for more details.

# 13. Reporting

## 13.1. Activity Monitor

The **Activity Monitor** screen can be accessed via the Media Manager Administration menu. This lists the last processes performed by the Arcsys media manager to handle requests for archiving/migration/retrieval of certain records.

There are a number of search criteria available.

State	Id	Details	Start date	End date	Delay
✓	966		2021-10-15 09:14:27.0	2021-10-15 09:14:29.0	2 (s)
✓	973		2021-10-15 09:14:27.0	2021-10-15 09:14:29.0	2 (s)
✓	975		2021-10-15 09:14:27.0	2021-10-15 09:14:29.0	2 (s)
✓	974		2021-10-15 09:14:27.0	2021-10-15 09:14:29.0	2 (s)
✓	987		2021-10-15 09:14:27.0	2021-10-15 09:14:29.0	2 (s)
✓	969		2021-10-15 09:14:27.0	2021-10-15 09:14:29.0	2 (s)
✓	972		2021-10-15 09:14:27.0	2021-10-15 09:14:29.0	2 (s)
✓	967		2021-10-15 09:14:27.0	2021-10-15 09:14:29.0	2 (s)
✓	970		2021-10-15 09:14:27.0	2021-10-15 09:14:29.0	2 (s)
✓	968		2021-10-15 09:14:27.0	2021-10-15 09:14:29.0	2 (s)

**Figure 13.1. Activity Monitor**

### 13.1.1. Search Criteria

The search criteria are:

*Number of jobs:* Limits of number of processes (jobs) displayed

*Job status:* Displays the processes in a particular status

- *Success:* Only the jobs that have ended successfully
- *Fail:* Only the jobs that have ended unsuccessfully
- *In progress:* Only the jobs that have not yet ended

When the criteria are entered, click on the **Search** button to display the jobs that meet those criteria.

## 13.1.2. Job List

Once the search is complete, a list of jobs is displayed. You can see the details of each one via the different table fields. These fields are:

**Status:** Status of the Job

-  : Ended successfully
-  : Ended unsuccessfully
- **In progress:** Not ended

*Id:* Arcsys job ID

*Details:* When clicked, the icon  displays all job actions (unit processes). This redirects you to the screen.

**Start date:** Start date of the process

**End date:** Date when the process has ended

*Duration:* Process duration



The screenshot displays the 'Details of the Job' page. On the left, there are navigation menus for 'Actions', 'Administration', 'Entitles', and 'Selected elements'. The 'Selected elements' menu shows 'Repository' with 'INSURANCE' selected. The main content area is divided into two sections: 'Details of the Job' and 'Actions list'.

Fields	Values
Job identifier	954
Request	505
Lot code	LOT007
Lot identifier	825
Wrap number	Manifest (envelope n°1)
Owner of the request	arcsys42super
Zone attached	COM_FIRST_PRIMARY
Start date	2021-10-08 16:19:52.0
End date	2021-10-08 16:19:54.0
Delay	2 (s)
State of the process	 (Ended)

Start date	Message
2021-10-08 16:19:52.0	Starting with envelope number [1][2] ([2740] bytes)
2021-10-08 16:19:52.0	Proceeding [1] fragment(s)
2021-10-08 16:19:52.0	Begin open Session for fragment [1]
2021-10-08 16:19:52.0	End open Session for fragment [1]
2021-10-08 16:19:52.0	Begin writing for fragment [1]
2021-10-08 16:19:52.0	End writing for fragment [1]
2021-10-08 16:19:52.0	Begin close Session for fragment [1]
2021-10-08 16:19:52.0	End close Session for fragment [1]
2021-10-08 16:19:52.0	Job ended with return code [0] (0=Successful / Other=Failed)

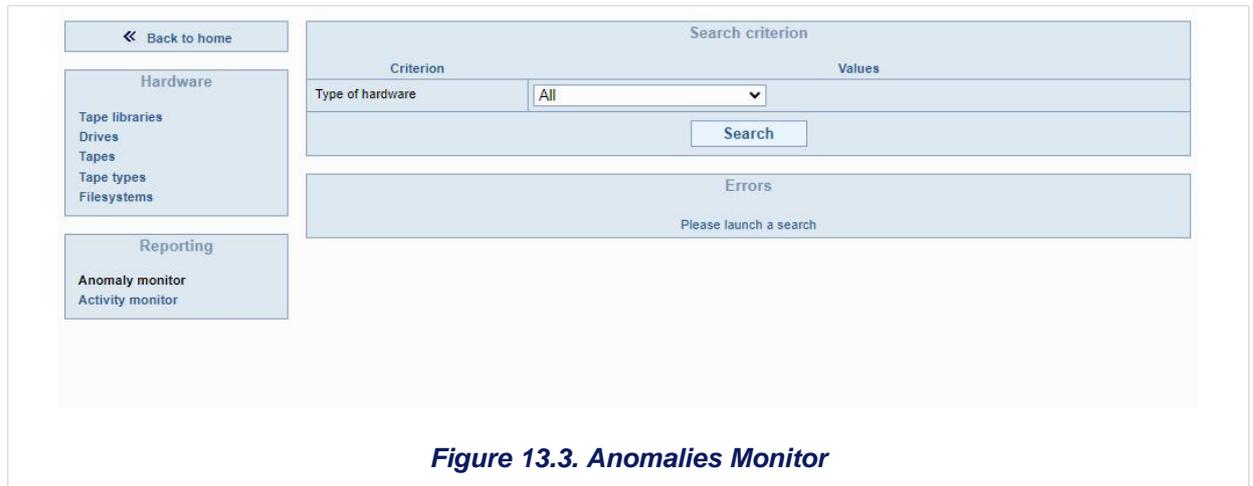
At the bottom of the 'Actions list' section, there are 'Refresh' and 'Back' buttons.

**Figure 13.2. Job Action List**

## 13.2. Anomalies Monitor

You can access the **Anomalies Monitor** screen from the Media Manager Administration menu. This lists all the errors of the different hardware types that the media manager manages.

As the number of devices can be high, there are a number of search criteria available: you can view errors for a given hardware type only.



*Figure 13.3. Anomalies Monitor*

### 13.2.1. Search Criteria

You can view errors for a given hardware type only. The different hardware types are:

- Tape library
- Drive
- Tape
- File system
- All

When a selection is made, click on the **Search** button to start the search.

### 13.2.2. Anomaly List

The fields visible for each of these errors are:

- **Identifier:** Arcsys error identifier
- **Actions:** Two types of actions are possible.

-  : Displays the hardware details that present this error.
-  : Edits the hardware details that present this error.
- *Detection date*: Date on which this error was detected
- *Hardware type*: Type of hardware that presents this error
- **Hardware identifier**: Arcsys identifier of the hardware that presents this error
- *Message*: Presumed reason for the error

# 14. Search

Refer to: Interface Guide

# 15. Exporting to Microsoft Excel Format

## 15.1. Introduction

### 15.1.1. Screens with Microsoft Office Excel Export Option

The "Search Result", "storage policy List", "Masks List" and "Tape Details" screens offer an option to export to Microsoft Office Excel format.

## 15.2. Getting a Report in Microsoft Office Excel Format

### 15.2.1. Export Button

Getting a report for the **current page** can be done by clicking on the **Export to Microsoft Office Excel format** button.

### 15.2.2. Saving a File

The browser will open a dialog box that allows you to save or immediately open the generated Microsoft Office Excel report (see Figure 15.1, "Selecting to Save or Open a Report" [126]).

The generated Microsoft Office Excel report gives exactly the same data as the current page, but without the images and links (see Figure 15.2, "Microsoft Office Excel File Generated" [126]).

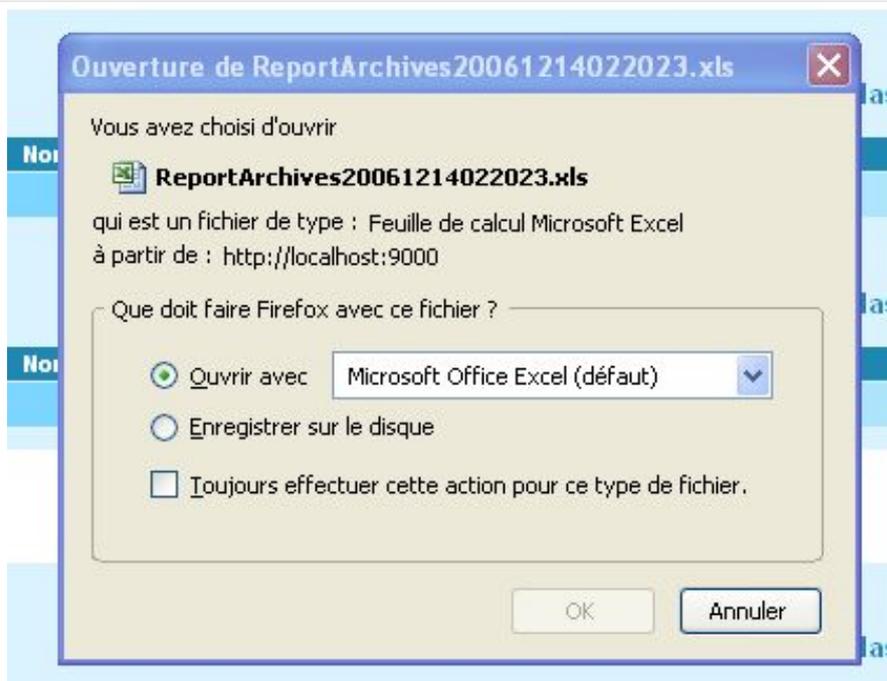


Figure 15.1. Selecting to Save or Open a Report

Information sur la bande	
Champs	Valeurs
Identifiant	301
Code barre	000000
Fabricant	
Robot	1
Utilisée?	Oui
Date d'insertion de la bande	2008-07-04 16:32:07.0
Nombre de montages restants	80000
Date limite d'utilisation	2023-06-11 20:06:06.0
En ligne?	(On-line)
Etat	(Déverrouillé)

Type de bande	
Champs	Valeurs
Libelle	LTO-400G
Capacité	429 496 (Mo)
Accès max	80 000
Montages max	5 000
Durée de vie	5 475 (Jours)

Zone associée	
Champs	Valeurs
Code	AMV_LTO3_001
Media Manager	ArcMover
Date de création	2007-12-31 12:06:47.0

Identifiant	N° Audit	Date de début	Date de fin	Durée	Action	Demandé par?	Etat
Aucune action trouvée							

Identifiant	Date de détection	Message
Aucune anomalie trouvée		

Voici la liste de lots (en partie ou en totalité) présents sur la bande

Identifiant	Taille (Ko)	Code de la base	Code de la collection	Code du lot
16021	605819	AdminBase	NBU_LTO3_5J	LOT_NBU_20080613193449309
16023	605819	AdminBase	NBU_LTO3_5J	LOT_NBU_20080613205341373
16025	605819	AdminBase	NBU_LTO3_5J	LOT_NBU_20080613211328606

Figure 15.2. Microsoft Office Excel File Generated



## Note

*If the browser is configured to open this kind of document, the "Save as" dialog box will not open but the report will open directly in the browser.*

# 16. Business Continuity Plan

## 16.1. Lots Pending Recovery

### 16.1.1. Introduction

This page is used to view the list of lots pending recovery to a given site. You can access it from the Administration menu (only if the you have the LDAP\_STORAGE\_MANAGEMENT right).

### 16.1.2. Page Description

The page is divided into two parts:

- List of sites and their code
- List of lots awaiting recovery

#### 16.1.2.1. Site

This table includes:

- Code: Drop-down list for selecting a site
- Label of the selected site

#### 16.1.2.2. Pending Tasks on Lots

This tab includes:

- Id: Identifier of the lot in the relational database
- Lot name: Code of the lot in the relational database
- Collection name: Code of the collection of the lot
- Repository name: Code of the repository of the collection of the lot
- Retention start date: start retention date for the lot
- Volume of the lot: Disk space (in KiB) needed to archive this lot
- Nb Zones: Number of zones where this lot in recovery mode.



Figure 16.1. List of Lots Pending Recovery

## 16.2. Recovery: Monitoring

The screens for monitoring recoveries can be accessed:

- For all repositories; click on **"Requests"** from the main menu then select **"Recovery"** in **"Filter by request type"**;
- On a repository that was selected beforehand, click on **"See requests"** then select **"Recovery"** in **"Filter by type of request"**.

This menu is used to:

- List all recovery orders for the lots
- Access the list of objects contained in the lots
- Display the details of the recovery

### 16.2.1. Recovery List

The following screen (Figure 16.2, "Tracking Recoveries" [130]) lists the recovery orders registered in the selected repository.

Use the search bar to add filters for its current status or its identifier.

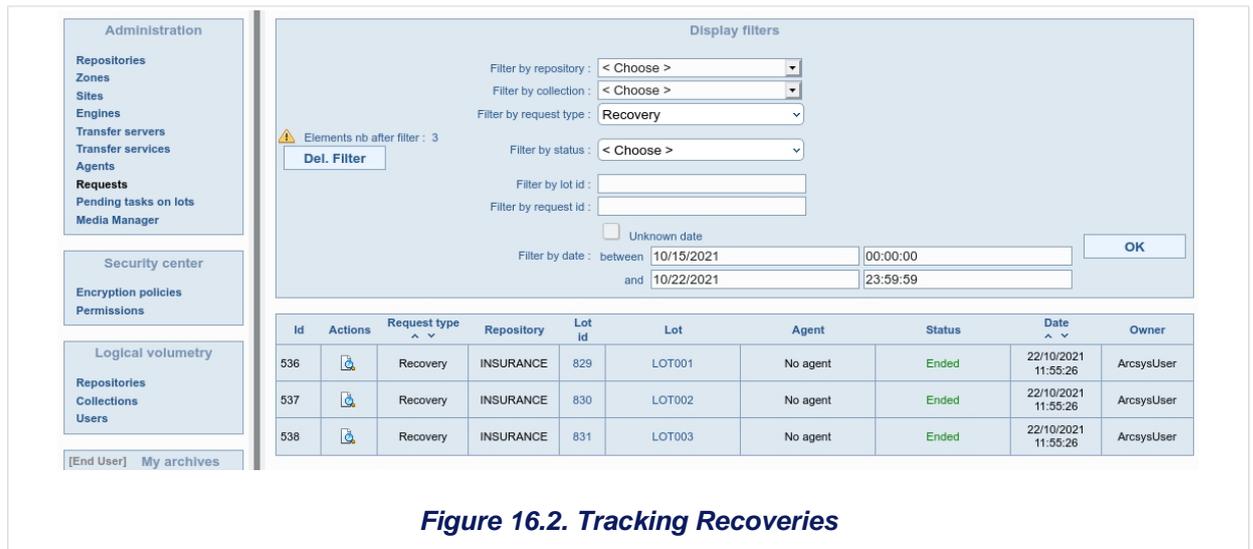


Figure 16.2. Tracking Recoveries

## 16.2.2. Contents of a Lot

To access the object list for a lot affected by a recovery order (Figure 2.18, “Object List” [35] screen), click on the name of the lot from the recovery tracking window.

## 16.2.3. Recovery Details

To view the history of the statuses held by a recovery order, click in the "Actions" column on the icon . The relevant screen then appears.

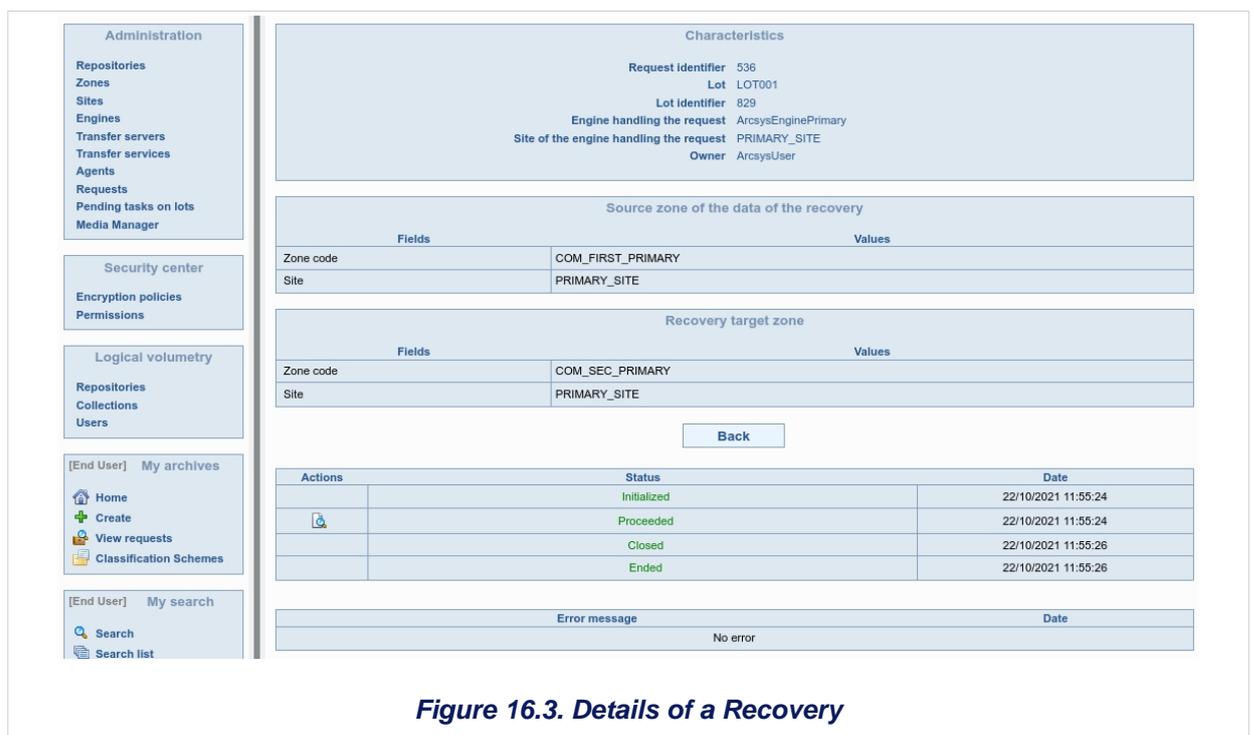


Figure 16.3. Details of a Recovery



## Note

*When orders have an error status, the details of this error appear in the history of the recovery order (Figure 9.6, “Details of a Retrieval Request” [82]). Error codes, as well solutions, are explained in the Interface Guide*



## Note

*Certain statuses of a request contain information on the processes performed. You can see this information by clicking on the icon  when the icon is present. The interface operates in the same as that for tracking archive requests.*

# 17. Logical Volume

## 17.1. Overview

### 17.1.1. Introduction

The Volume module makes analysis of volumetric data more accessible for Arcsys administrators.



#### Important

The volume is "logical" as it corresponds to the data entering Arcsys: It is not a "physical" volume which is the total volume used by all copies + manifests + object handlers, etc.

### 17.1.2. Access to Functions

Volume monitoring is a function present in the "**Logical Volumetry**" part of the main menu; only "GRANT\_ALL" type users have access to it. You can access this screen without previously selecting a repository.

## 17.2. Description of Volume Screens

### 17.2.1. General

There are three types of Arcsys objects that can be tracked by volume monitoring. These items are as follows:

- Repositories
- Collections
- Users

Each of these elements has a space for volume monitoring. Nevertheless, with a few small differences, they all have the same functionalities and layout, from top to bottom:

- A drop-down list to select the desired type of volume
- Several fields to change the volume filter
- A reset button to delete all filters and item selections
- A list of items on a number of pages if necessary
- A line displaying the total volume of the filtered list

A drop-down list to change the unit in which the volume is displayed

The screenshot displays the 'Logical volumetry by Repositories' interface. On the left is a navigation menu with sections: Administration (Repositories, Zones, Sites, Engines, Transfer servers, Transfer services, Agents, Requests, Pending tasks on lots, Media Manager), Security center (Encryption policies, Permissions), Logical volumetry (Repositories, Collections, Users), and [End User] My archives (Home, Create). The main area is titled 'Search criterion' and contains several search filters: 'Type of Volume' (Current volume), 'Repositories created between the' and 'Archives created between the' (date pickers), 'Minimum repositories volume' and 'Maximum repositories volume' (input fields with MiB dropdowns), 'Repository code' (input field), and 'Creator' (input field). There are 'Reset' and 'Filter' buttons, and a warning: 'This operation will delete all selection in progress.' Below is the 'Elements table' showing 'Reposities selected : 0'. The table has columns: Id, Repository code, Creator, Creation date, and Volume (MiB). The data rows are:

Id	Repository code	Creator	Creation date	Volume
2	BaseTest	arcsys42super	07/20/2022 08:54:36	143 461,84668 MiB
1	AdminBase	arcsys42super	07/20/2022 08:41:59	52,125977 MiB
5	BaseClea	arcsys42super	06/14/2023 14:05:36	0,454102 MiB
11	BaseTestJournal	arcsys42super	11/27/2023 10:56:49	0,000977 MiB
Total				143 514,427734 MiB

Figure 17.1. Logical volumetry by Repositories

## 17.2.2. Volume Type

Two types of volume are offered to the user:

- The **Current volume** is the size of the lots currently present in the system.
- The **Cumulated volume** matching the size of all the lots archived in Arcsys since the start of operation, as well as the size of those lots whose end retention date has expired, are counted.

### 17.2.2.1. Selection

Select the volume type via the drop-down menu located at the top of each page.



#### Note

*The default volume type is "Current Volume".*

To change this option, click on the drop-down list to display the options, select "Cumulated Volume" and click again.

This action automatically reloads the page, taking into account the volume type change.



## Important

**Important: If filters have been applied or items chosen, they will be kept.**

### 17.2.3. Reset

Resetting an item page rapidly deletes all current selections and applied filters and resets the type of default volume type, i.e. "Current Volume".

### 17.2.4. Filters

The purpose of filtering is to limit the displayed list of items and thus those that can be selected.

This takes place in two stages. First, you must enter the appropriate values in the fields provided for this purpose.

For Repository and Collection items, you can filter the list according to:

- Minimum and/or maximum creation date for the entity
- Minimum and/or maximum creation date for a record
- Item code
- Minimum and/or maximum volume (as well as the volume unit)
- Owner (creator) of the item

For User Monitoring, you can filter according to:

- Minimum and/or maximum creation date for a record
- User login
- Minimum and/or maximum volume

Then click on the validation button called *Filter*.

Once the filters are validated, a new list of items is provided by applying the filters informed and **cancelling all previous selections**.

### 17.2.5. Overview of Items

The items list has the same Arcsys design. These lists are recovered from the relational database.

To the left of the list, a selection option is available with a checkbox to select or deselect an item.



## Note

*In the "selection" column, use the checkbox to select or deselect all items in the current page.*

# Glossary

## Access Zone

An access zone is an independent entity within Arcsys that defines a controlled network area from which resources can be accessed. These entities can then be attached to permissions (at the repository, collection, lot, or class level) to restrict or grant access based on the client's IP address when authenticating to the Arcsys REST API, the Arcsys Web Agent or ArcWeb Module.

## API (*Application Programming Interface*)

The APIs provided by Arcsys enable the product holder to fully customize a new application or user interface according to the specific ergonomic needs of their use case. Arcsys exposes several types of APIs:

- REST APIs are the recommended interface. They offer broad coverage of Arcsys's functionalities, including administration, operations, archiving, search, and archive retrieval.
- Legacy APIs based on RMI and SOAP protocols are still available for compatibility purposes but are deprecated and should no longer be used in new developments.

## Application Agent

There are two different types of agents at archiving level: application interface agents and user interface agents. An **application agent** can archive all the objects specific to an application (files, RDBMS table records, etc.), whereas a **web agent** performs both administration functions and manual archiving functions initiated by the user.

## Archiving By Reference

Archiving by reference is a method in which data remains in its original storage location when added to an archive system, and the system generates references and metadata entries for the files. Eventually, the files are transferred to the archive system's defined storage using the copy and migration mechanism.

## Archive Restitution

Archive restitution is the return and transfer of archived documents to their originator, or to a duly appointed person or organization. An Archive Restitution is in Arcsys an Archive Retrieval operation that ends with a Destruction. An Archive restitution operation can only be created through the appropriate operation in the REST API, or by using ArcEP module. See Also [Archive Retrieval](#), [Destruction](#).

## Archive Retrieval

Archive retrieval is an operation that makes a copy of a record available to a record requester. This term takes precedence over the term *restore*, which has another meaning at archiving level (restore in the sense of handing back the documents to the organization that created them or to its representatives, then destroying them). Archive retrieval can be

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complete (misleadingly called a "complete retrieval") or partial (*Partial Archive Retrieval*, misleadingly called a "partial retrieval").

See Also **Archive Restitution**.

## Arcsys

ERM published by Infotel. Arcsys refers to both the Arcsys Core product and all of its connectors and options.

## Arcsys Connector

An Arcsys connector is an operational module generally requiring an additional license used to interface with an external software package (ECM, ERP, Mail) for archiving and/or archive retrieval to and from Arcsys.

## Arcsys Core

The Arcsys Core represents all "essential" Arcsys modules, which are: Arcsys Database, the Arcsys RMI, TCP/IP and SOAP API, the Arcsys REST API, the Arcsys Transfer Server, the Arcsys Transfer Service, the Arcsys Engine, the Arcsys Web Agent, the Arcsys Application Agent, the Arcsys Auto-Archive Agent, the ArcFF format control module, the CopyRequestManager, the Arcsys standard Clients, the ArcsysFsComparator File systems comparator, the ArcProofFolder Proof Folder module and the ArcsysBatchs batch module. See Also **Arcsys**.

## Arcsys Engine

Central archiving platform on which synchronous and asynchronous archiving, indexing and retrieval processes operate. The engine can spread threads over multiple processors. This guarantees dialogue and traceability between the agents that are associated to it.

## Arcsys Option

Arcsys options are added to the Arcsys Core for additional functionalities. They do not necessarily require an additional architectural module. They may be subject to a separate license. The main options are:

- ArcAFP Option (AFP format management)
- ArcMover Tape Option (media manager managing file systems and tape libraries)
- ArcIP (record ingestion)
- ArcEP (record extractor)
- ArcPAK Option (record compression on ArcMover and native ingestion of compressed files)
- ArcRFT Option (full text search)
- ArcSIGN Option (internal digital signature generation) and ArcVERIF (external digital signature verification)

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- ArcCrypt Option (encryption of data at rest)
- ArcCFN (digital vault)
- ArcREF Option (record ingestion by reference)
- ArcMOVS3 Option (media manager allowing to archive and retrieve data on any Cloud media compatible with the Amazon S3 REST API)

### Attestation policy

An attestation policy allows to define which type of attestation can be generated as well as a set of parameters concerning their generation.

### Classification Scheme

A classification scheme in archiving and digital preservation refers to an organized framework for categorizing records and archival materials based on a hierarchical structure. It facilitates systematic retrieval, management, and preservation of information. In the context of Arcsys, the classification scheme is defined as the structural entity that contains a hierarchy of classes. These classes are used for organizing archives and records and for implementing specific archival policies such as retention schedules and format management. Within Arcsys, a classification scheme is linked to a specific repository, providing an organizational backbone for multiple collections. It also serves as a navigational tool for end users, enabling them to explore archives through the hierarchical structure of classes, alongside navigation by repository and collection.

### Collection

Set of rules that a record must comply with. The collection is defined via the Web agent or Arcsys API, and comprises information contained in the relational database tables. A collection always refers to two rules: one concerning the **storage policy** and one relating to the **indexing mask**. A collection is assigned to the record on the initial record request. See Also **Storage policy**, **Indexing mask**.

### Deletion

MOREQ2010 provides the following definition for this concept: the act of deleting data from the relational database so that no trace remains. Generally speaking, an entity can only be deleted if is not used in a stored record. Otherwise, it can only be destroyed and not deleted, thus leaving a residual entity. See Also **Destruction**.

### Destruction

Irreversible action that deletes the documents by applying disposal criteria. It can be associated with the retention of residual information in the relational database.

### Disposal

Outcome of archived documents when the retention period ends, i.e. generally, destruction or transfer. See Also **Destruction**, **Transfer**.

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### **Disposal due date** (or retention end date)

Scheduled end of retention date.

### **Disposal Hold**

Arcsys can be used to place a "disposal hold" on one or more lots archived in the application. This prevents certain sensitive operations, such as transitioning the lots to end-of-life status or migrating them to a different storage medium. All other operations remain authorized. The disposal hold guarantees that no irreversible change affecting the archival integrity or status of the lot can occur while the hold is active.

### **Electronic Attestation**

Document produced to attest that an action or an electronic transaction has occurred.

### **Envelope**

Arcsys groups documents stored in the system in envelopes, either created by Arcsys during the archiving process (in this case, files in TAR format), or created prior to Arcsys processing by the user or third-party processes (*native envelopes* in AFP or ZIP format, for example). The representation of an envelope in the Arcsys Database is called a **logical envelope**. Its technical implementation is also called *MoverReference*. Last but not least, the representation of information of where the envelope is physically stored in the optional ArcMover module is called *MoverMedia*.

### **Event**

In Arcsys, a retention schedule can associate the start of record retention with an event with a known or unknown date. This event, created in an Arcsys repository, can thus be attached to a number of different retention schedules.

See Also [Retention schedule](#).

### **Feature preview**

A Preview status on a feature enables early access to non-production features, allowing users to explore and provide feedback for improvement.

Features in Preview status should not be used in production environment, as they are not fully implemented yet.

### **Fixity**

The quality of a document that has not been subject to intentional or accidental destruction, alteration or modification.

### **Format policy**

A format policy is used to define a set of rules concerning format checks for a given file type. These rules are used to specify the action that will be performed, the expected results of these actions, as well as the error cases, triggering archiving failure.

### **Hash value**

Also called an "integrity certificate" in cryptography, the hash value is the digest of a message which guarantees a practically unique result that is impossible to reverse calculate. The most commonly used algorithms are MD5 (128 bits), SHA-1 (160 bits), SHA256 (256

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bits) and SHA512 (512 bits). Arcsys includes a module that is capable of dynamically calling several algorithms. The choice of an algorithm type is valid for all archived objects within the same Arcsys product version; compatibility with algorithms from the previous version is guaranteed. The associated term *hash function* is also used.

### **Indexing mask**

As is the case with the storage policy, an indexing mask is a rule that is referenced by a collection. An indexing mask can be referenced by several collections. An indexing mask refers to the use of a set of Keyword = Value pairs. The keyword component is set to make sense in a specific business application (e.g. Accounting Day, Department, Account No., Account Holder, etc.). The value component can be either unrestricted, or restricted to a set of acceptable values (e.g. A, B or C), or in date format, or restricted by an input mask. Some pairs are defined as mandatory whereas others may be optional.

An application which uses an indexing mask through a collection must supply all Keyword=Value pairs as they are defined using this mask. Any indexing-related errors lead to the record being rejected for conformity. This record is then added to the list of records with errors.

The indexing mask is defined by an administrator via the Arcsys interface or APIs. It is comprised of a set of metadata element definitions.

### **Journal**

A journal is an XML file which contains a list of PREMIS events.

### **Lot**

Arcsys can consolidate several different objects that form a functional set in a client application in the same physical record. It is comprised of different types of objects: files, databases, or any other type of object managed by Arcsys. It is possible to retrieve the entire lot or one of the objects contained in the lot. The MOREQ2010 record is translated in Arcsys implementation by a lot; the lot, as opposed to a MOREQ2010 record, can represent documents that are not yet archived.

### **Lot enrichment**

The process of adding new objects to an existing archive.

### **Manifest**

The manifest is an XML file that defines precisely the content of a record. The manifest contains: metadata associated with the record, structure metadata, a description of the physical files of the record(s) that follow, the object-by-object content of the record, object formats, object names, their size, hash value, the algorithm used to calculate the hash value, etc. The manifest is a type of complete ID card for the record.

The manifest is always written on the storage media and precedes the record that it describes. This process is used to automatically describe storage media (irrespective of the medium). With this system, users can understand media content and metadata without installing the software that generated the records.

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### **Metadata element definition** (or keyword)

Component of an indexing mask. We use the term "metadata element definition" rather than the term "keyword" as it is closer to MOREQ2010. The metadata element definition in particular defines the type of metadata (date, string, digital, controlled) and its input mask, for example.

See Also **Indexing mask**.

### **Object**

The object is a basic archived unit that can be retrieved via Arcsys. Lots contain one or more objects. An object can be: a file, a directory, a table, a relational table, etc. The MOREQ2010 component is implemented by this object concept; the object, as opposed to a MOREQ2010 component, can represent a document that has not yet been archived.

### **Online**

Storage level, which must be disk type, that makes records permanently available within an extremely reduced time period.

### **Permissions**

Permissions refer to the user profiles or groups authorized to access documents or sets of documents archived in the system.

### **Program exit**

Place in the standard workflow for picking up and executing specific code.

See Also **Workflow**.

### **Proof folder**

A proof folder consists of a record, a proof slip, and, where appropriate, additional items (common signature or timestamp response, for example) that are used, by demonstrating the fixity and the authenticity of a document, for admission as proof. A proof slip can be generated using Arcsys Web Agent, ArcWeb Module, or Arcsys REST API. A proof folder can only be generated using ArcEP.

### **Record**

A record is an evidential document that is deemed sufficiently important by the creator to be managed by an ERM that will manage its life cycle (retention, disposal, etc.). A record represents an archived lot. A record is archived via a *record request*. Archiving a document *creates a record*.

### **Relational database** (or referential)

Essential component of the system, it contains all the data (excluding archived data) used by Arcsys for its operation. It includes logical entities called "repositories" (see definition).

### **Repository**

Logical entity in the Arcsys relational database. The company can define as many repositories as it wants, either to define a test set, to isolate an application, or for any other reason. These repositories are entirely independent of each other. They all have their own pattern and all have the same structure.

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### **Restore**(or retrieval)

This term is used misleadingly in Arcsys to refer to the concept of archive retrieval. It is not accepted in archiving terminology as to mean transfer and then destruction.

See Also **Archive Retrieval**.

### **Retention and disposal schedule**

This comprises all the rules defining the record retention period for a company or an organization, according to risks of unavailability and information system access requirements. It specifies the disposal after these time periods.

See Also **Retention schedule**.

### **Retention period**

A duration expressed in days, months or years of object retention. The retention period is a concept used notably in MOREQ2010.

### **Retention schedule**

A retention schedule defines the start and the end of the retention of records that are attached to it, either directly or through their class.

### **Retention start date**

Date from which a retention period must be taken into account. The retention start date is a concept used notably in MOREQ2010.

### **Security**

An ERMS requirement that involves including documents whose use (confidentiality, risk of exposure) and/or fixity (non modification of content, non-alteration of media) should be closely monitored.

### **Storage policy**

A storage policy is a rule that is referenced by a collection. The policy dictates the storage media which are successively implemented to hold a record, as well as the retention period for each media. The storage policy is defined through the graphical interface. Applications or business users use it indirectly through the reference to a collection. A storage policy can be changed over time to reflect new retention periods or new storage media. The policy covers storage units by logical pool.

### **Storage pool**

Logical storage pool, characterized in particular by its time period (e.g. 10 years). The storage policy assigns a "zone" to a "policy".

### **Storage zone**

The storage zone is a logical entity representing a physical storage space (e.g. set of file systems, tape libraries, cloud storage).

### **Synchronous retrieval**

Archive retrieval that takes place in the form of a direct retrieval of a document (for direct viewing or downloading) in a Web browser.

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See Also [Archive Retrieval](#).

### **Time stamping**

Time stamping is a technique used to associate a document with a certain date in reference to a given and recognized time system. The date set in this way is an essential element for document authentication. Time stamping can be performed internally or by a third-party time stamp.

### **Tracking**

Result of continuously creating, capturing and maintaining information about the movement and use of the system and objects (ISO 15489-1:2001, 3.19).

### **Transfer**

In an archival sense, this operation sends an archived object to another IT system. Once the transfer is performed, the object can be removed from the ERMS as needed. In OAIS terminology, a transfer represents more specifically the physical transmission of a record or a set of records by a service supplying an archive service. Not to be confused with the transfer of data in the purely technical sense, as with the Arcsys Transfer Server module.

### **Transit Zone**

Entity logically connecting an application agent and a directory, along with additional configuration.

### **Workflow**

A set of operations carried out from the beginning to the end of a process. In Arcsys, this refers to all actions carried out on archives and objects, either directly or indirectly, in the case of archives, from their pre-archiving or preparation to their removal from the system (after they have reached end-of-life). There are other workflows in Arcsys besides the archiving workflow, which are more administration-oriented. Customized workflow involves the use of at least one drop-off point to carry out customer processing.

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