Arcsys Web End User

Interface Guide

25.3.1.STS
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Preface

1. Introduction

This manual describes all the features of the Arcsys Web End User interface.

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**

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. Introduction

The purpose of the Web Agent End User interface is to offer a simple and efficient graphical interface used to manage and check the archiving and retrieval functions available in Arcsys product.

2. Principles

2.1. Design

2.1.1. Standard Screens

All screens shown in the Arcsys Web Agent have the same structure and comply with the same design.

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.

2.1.2. Icons

The design used for the Arcsys End User interface also defines a series of icons each with a special meaning within the software package.

Icon	Clickable?	Meaning
	**No**	This icon represents a 'directory' type object.
	**No**	This icon represents a 'file' type object.
	**No**	This icon represents a **non** archived lot.
	**No**	This icon represents an archived lot.
	**No**	This icon represents a lot in disposal hold.
	**Yes**	Icon displayed when disposal hold is possible.
	**Yes**	Icon displayed when deletion is possible.
	**No**	Icon displayed when deletion is not possible.
	**Yes**	Icon displayed when editing is possible.
	**No**	Icon displayed when editing is not possible.
	**Yes**	Icon displayed when details (content) can be displayed.
	**Yes**	Icon displayed when a record can be displayed online.
	**Yes**	Icon displayed when archiving is possible.
	**No**	Icon displayed when archiving is not possible.
	**Yes**	Icon displayed when retrieval is possible.
	**No**	Icon displayed when retrieval is not possible.
	**Yes**	Icon displayed to contact the administrator.
	**No**	This icon represents a value meeting a criterion.
	**Yes**	This icon displays the details of the successfully terminated request
	**No**	This icon represents a value that **does not** meet a criterion.
	**Yes**	This icon displays the details of the request showing an error
	**No**	This icon represents a user.
	**No**	This icon represents a user group.
	**Yes**	Icon displayed when a calendar can be used.

2.2. Error Pages

2.2.1. Description

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 2.1, “Error Page” [5] displays the error page shown when a user has not been identified by the application:

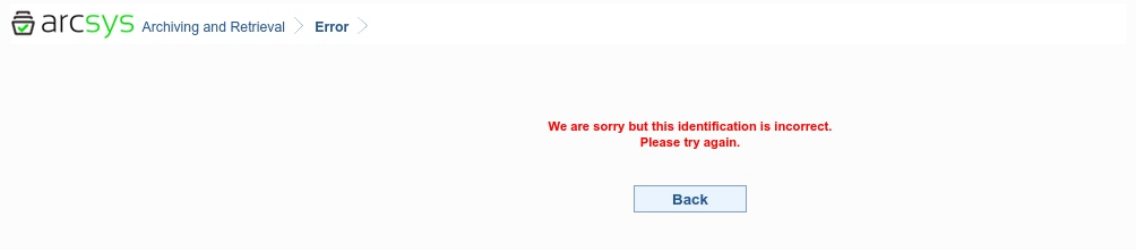

Figure 2.1. Error Page

3. Internationalization

The Arcsys Web End User 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:

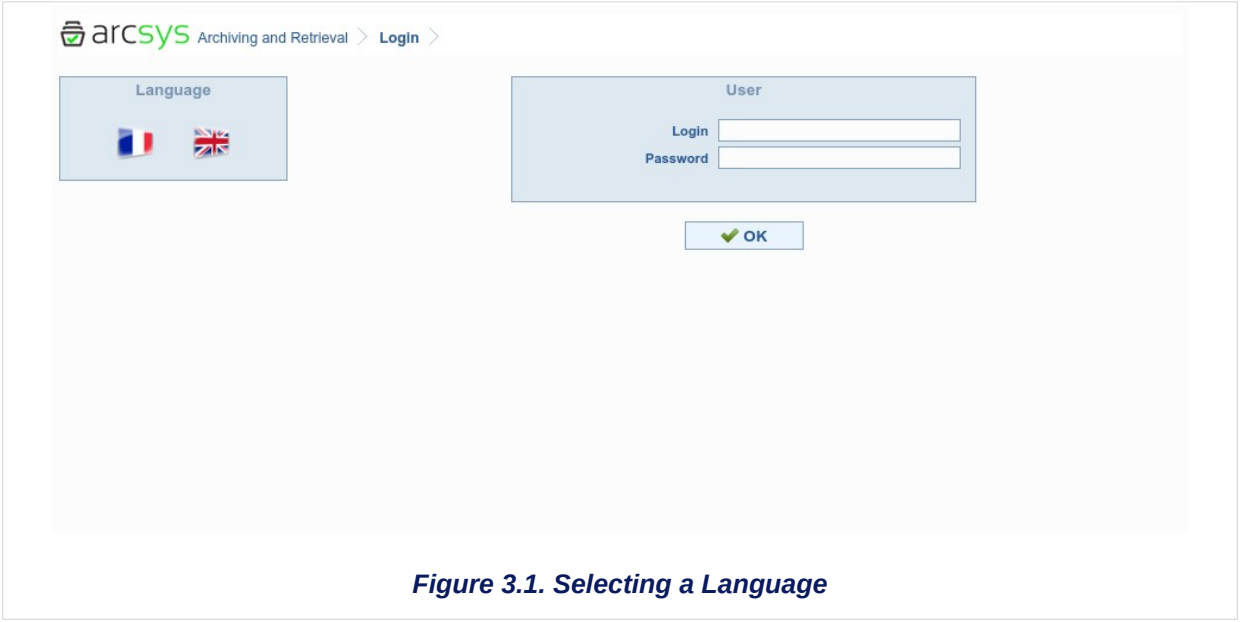

Figure 3.1. Selecting a Language

4. Concepts

4.1. Arcsys Elements

The *Repository* and *Collection* concepts used in this manual are defined in the glossary. You can also refer to the NAME_PRESENTATION_MANUAL, which explains these concepts in greater detail.

4.2. Record

A record is considered to be a set of digital objects (files and folders) that comprise the archiving entity within Arcsys.

A record has a name, a description, a list of items (files and folders), a unique number and a set of keywords that define it.

A record can have one of the following statuses:

- Archived / Not archived
- Disposal hold / Not on hold

You can archive a record if it has not yet been archived. You can retrieve a record if it is archived.

A record on disposal hold is archived by definition.

A non-archived record is a record that is prepared, ready to archive, but for which no archive request has been made.

A record is considered archived when the archive request is made, and the corresponding procedure has been performed.

5. Functions Offered

5.1. List of Functions

Arcsys offers the following functions via its End User interface:

- **Send emails to an administrator**: Contacts the software package administrator in the event of a problem, for example.
- **Change password**: Changes the password of the connected user.
- **Create records**: Defines all the data comprising the record as well as a description (name and description).
- **Search for records**: Finds any created record, whether archived or not, using its number, predefined criteria or keyword value.
- **Display records**: Displays the list of objects it contains as well as the data describing the record.
- **Edit records**: Edits the content and/or descriptive data for any record that has not yet been archived.
- **Delete records**: Deletes any record that has been created but not archived or at the end of its life.
- With **Record downloading**, you can download one or more records or one or more documents in ZIP format.
- **Create archiving request**: Archives a record created but not yet archived.
- **Create retrieval request**: Retrieves a complete or partial record.
- **Display archiving and retrieval requests**: Displays requests made (by repository) and establishes the current status of each request.
- **Manage disposal holds**: Creates, displays, modifies and deletes existing disposal holds.

Note

Record display, modification and deletion functions as well as archive, retrieval and disposal hold creation requests can be accessed from the search result screen only. You must therefore perform a search of the records before performing an action on records found.

5.2. How do I...?

5.2.1. Introduction

This section 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.

5.2.2. Displaying an Online Record

Displaying an online record is done in three steps:

1. Search for the record to display;
2. View the record description;
3. Select the file to display online.

5.2.3. 1 – Search for the Record

The first step consists of searching for the record you wish to display.

The procedure for searching a record is described in this manual in the chapter Detailed Overview of Functions – Searching for a Record.

5.2.4. 2 – View the Record Description

The second step consists of displaying the record description. This is available from the search result screen.

The procedure for viewing a record description is described in this manual in the chapter Detailed Overview of Functions – Record Description.

5.2.5. 3 – Select the File to Display

Once the record description screen appears and if the record is online, clickable icons  appear in the table listing the record contents, to the right of each file.

The procedure for viewing a record description is described in this manual in the chapter Detailed Overview of Functions – Record Description.

Part 2. Detailed Overview of Functions

1. Identification

1.1. Description

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 the Arcsys Administration Manual);
- The home page.

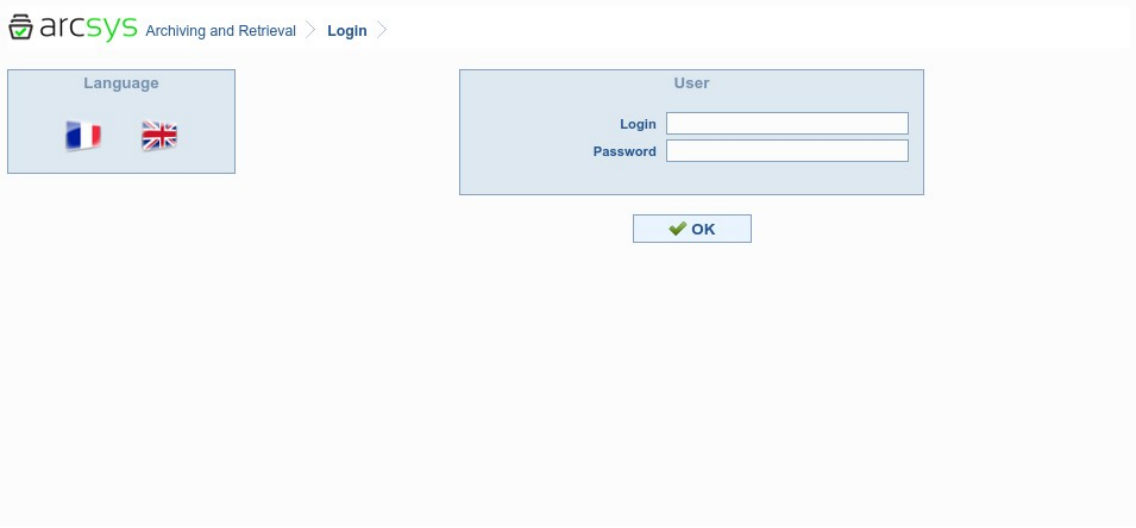

Figure 1.1. Logging on

2. Logout

2.1. Access

To log out, use the "**Logout**" link in the menu. This closes the current section and returns you to the login screen (Figure 1.1, “Logging on” [11]).

3. Contacting an Administrator

3.1. Access

The screen that enables you to contact the Arcsys administrator can be accessed by clicking the "**Contact an administrator**" icon, located in the top right corner.

There are two main types of request:

- Account opening request for a user who does not have permissions
- A more general request

3.2. Account Opening Request

The following screen Figure 3.1, “Account Opening Request” [13] enables a number of settings to be completed (some mandatory, others not) so that the administrator has sufficient information to open a user account in Arcsys.

When the mandatory fields have been completed, click **Send** to send the mail to the administrator.

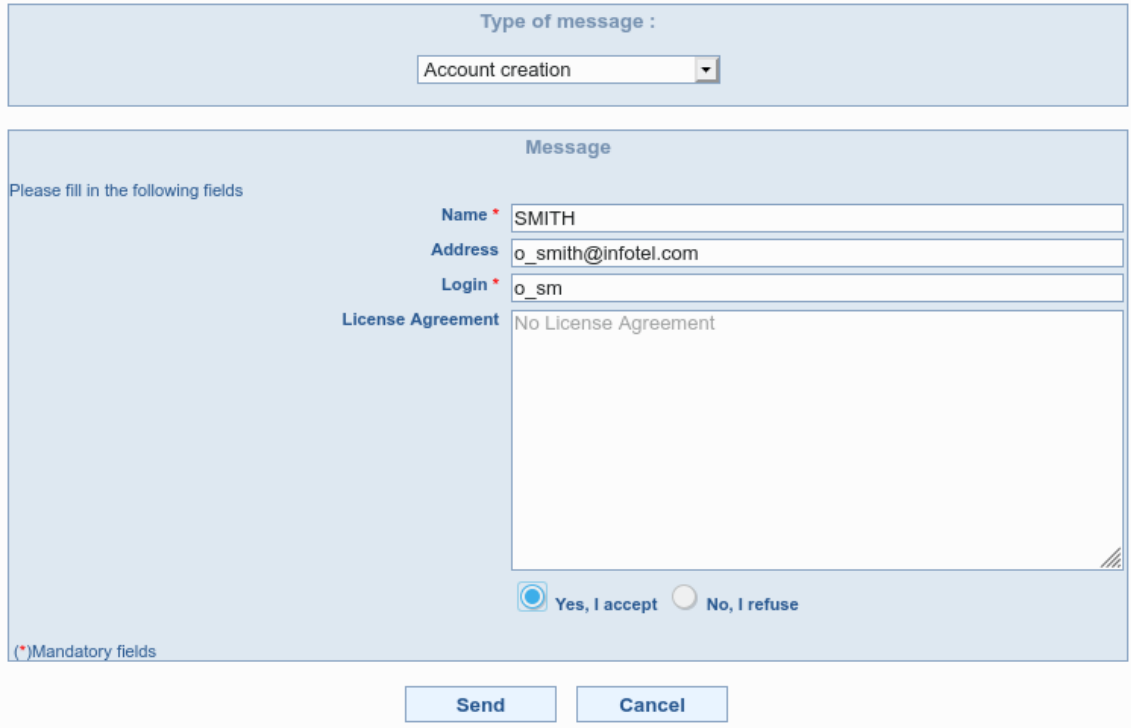

Figure 3.1. Account Opening Request

4. Changing the Password

4.1. Prerequisites

To carry out the LDAP password change, the LDAP_ADMIN_xxx (see Arcsys Administration Manual) parameter must be completed by a user with sufficient write permissions in the LDAP; otherwise the password change in the LDAP will fail.

4.2. Access

The screen allowing the connected user to change the LDAP password can be accessed by clicking the **Change password** icon in the top right corner. This link provides access to the screen where the password can be changed.

4.3. Editing

To change the user's password, enter the old password and the new password, and then reconfirm the new password to prevent any keystroke error. Then click the **OK** button.

If the password has been changed correctly, an icon will be displayed at the top of the page Figure 4.1, “Changing the Password” [14].

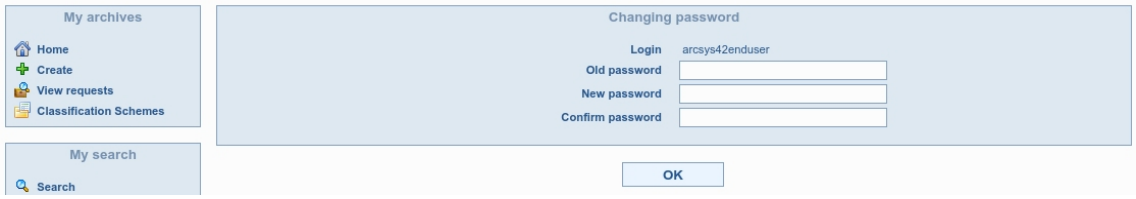

Figure 4.1. Changing the Password

5. Home

5.1. Access

Users are redirected to the home screen after logging in.

5.2. Description

The home screen contains a summary of the last actions performed by the user. It is divided into four sections:

- Last records archived (described in the See requests chapter)
- Last saved searches (described in the search section of the Searching for a Record chapter)
- Last deliveries (described in the See requests chapter)
- Last synchronous retrieval (described in the See requests chapter)

In each section, the **More** button can be clicked to access the corresponding detailed section.

Figure 5.1. Home Screen

6. Creating/Editing a Record

6.1. Access

The screen letting you create/edit a record can be accessed from the menu, using the link **Create a record** or by clicking on the **Edit** icon in a search results (see the chapter Searching for a Record). This screen is divided into several tabs that let you perform all the actions necessary in creating/editing a record.

6.2. "General Data" Tab

The tab below (Figure 6.1, “"General Data" tab in Creating/Editing a Record” [17]) contains general information on the record. It lets you:

- Select a repository from a list (creation mode). If you can only access one repository, it is automatically selected.
- Select a collection from a list (creation mode). If you can only access one collection, it is automatically selected.
- Enter the record name (64 characters max.).
- Enter a description for the record (250 characters max.).
- Select the classification scheme for the record.

In creation mode, when no collection is selected, only this tab appears. Once the collection has been selected, the other tabs required for creating/editing a record appear. Nonetheless, two buttons appear that let you:

- Prepare the record: This action saves the changes made in the record without checking the mandatory keywords. You will be redirected to the same page, except in **Edit a record** mode.
- Archive: This action performs all the checks necessary in creating an archiving request. If all the checks are correct, an archiving request will be created and you will be redirected to the request query page in order to track the evolution of your archiving request. If an error occurs, it will be shown below the tabs in list form.

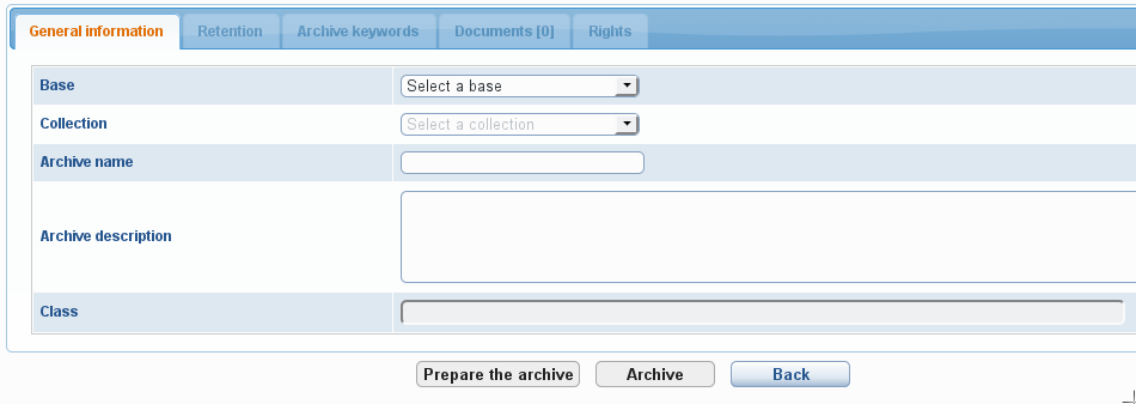

Figure 6.1. "General Data" tab in Creating/Editing a Record

6.3. "Retention" tab

The "Retention" tab is used to display and modify the retention information of a record:

- Retention schedule stemming from the record class selected in the first general information tab (note that in the current version, you must click on "Prepare the record" for this retention schedule to be correctly calculated)
- Specific retention schedule to overwrite the retention schedule stemming from the class
- Archiving date
- Retention start date
- Final sort date

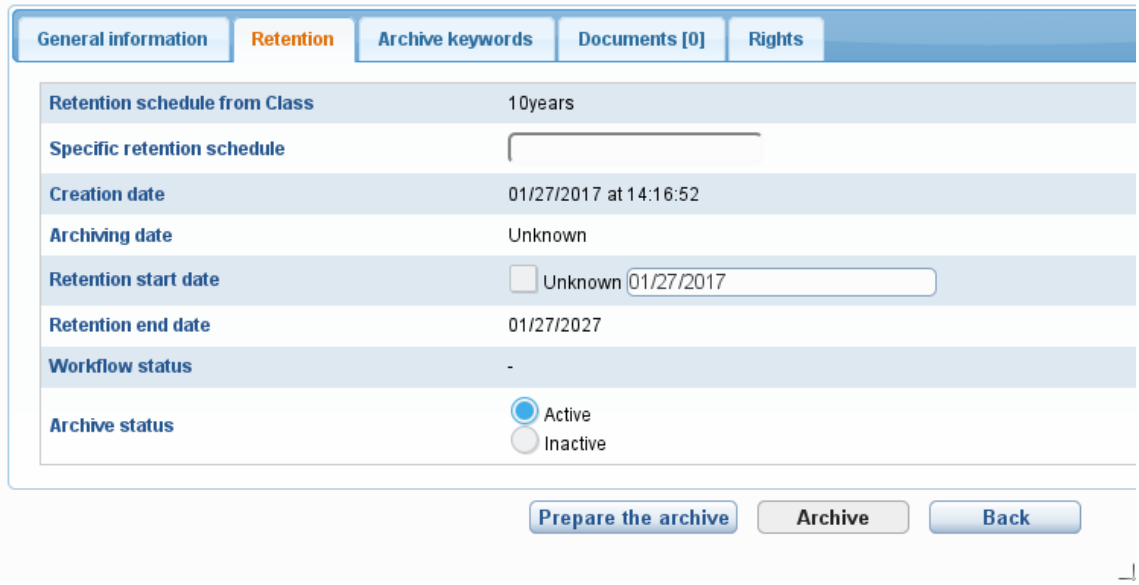

Figure 6.2. "Retention" tab in Creating/Editing a Record

6.4. "Record Keywords" Tab

The following tab (Figure 6.3, “"Record Keywords" Tab in Creating/Editing a Record” [18]) contains to the record's keywords. It is used to attach/delete/change metadata for the record. To archive a record, at least one metadata must be informed for all mandatory keywords. Non-mandatory keywords are optional. A keyword can be any of four different types:

- Character string (it may have a mask and/or a format that must be followed)
- Numerical
- Date
- Controlled (list of values) If a label is informed for a controlled value, this label will be taken into account.

If a metadata is left blank, it will be deleted on saving the record, unless the associated keyword is mandatory and it must contain a metadata.

You can also set a child metadata for a keyword with a child keyword.

Figure 6.3. "Record Keywords" Tab in Creating/Editing a Record

6.5. "Documents" Tab

The following tab (Figure 6.4, “"Documents" tab in Creating/Editing a Record in Edit Mode” [19]) contains the documents for the record. It lets you:

- Add files or folders to the record by clicking the button **Add documents**. According to the Web interface configuration (`USE_FILE_UPLOADER` option of WEBAGENT_GUIPREFERENCES.xml), the file paths accessed by an agent or the files to send can be selected.
  - File sending: Select the files on the client side and send these files to the server so that they can be archived.
  - File path selection: A file or folder can be selected in the input field or by clicking the **Browse** button and selecting a file or folder using the file explorer. In both

cases, whether entering the file directly or selecting it, click the **Attach item** button to continue.

- Delete a document by clicking the **Delete** icon in the **Actions** column.
- Attach/delete/change metadata in a document. To archive a record, at least one metadata must be informed for all mandatory keywords. Non-mandatory keywords are optional. A keyword can be any of four different types:
  - Character string (it may have a mask and/or a format that must be followed)
  - Numerical
  - Date
  - Controlled (list of values) If a label is informed for a controlled value, this label will be taken into account.
- To view details of the document hash, click on the **Hash details** icon in the **Actions** column.
- Filter the documents by name by entering a value in the "**Name**" field and click on the **Filter** button.

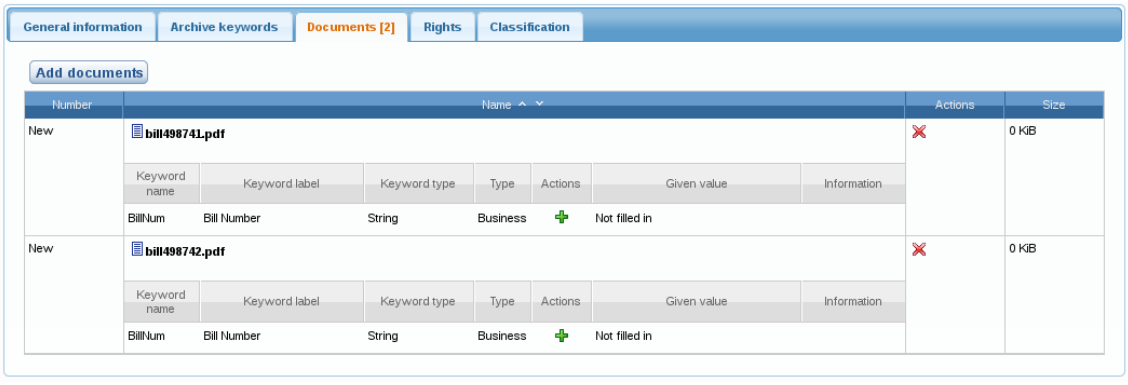

Figure 6.4. "Documents" tab in Creating/Editing a Record in Edit Mode

6.6. "Permissions" Tab

The following tab (Figure 6.5, “"Permissions" tab in Creating/Editing a Record” [20]) contains the permissions for the record. It lets you:

- Add one or more user groups with a click on the **New** button.
- Delete a user or a group with a click on the **Delete** button.
- Cancel any changes to permissions, with a click on the **By default** button.

- Modify permissions for a user or group by selecting/deselecting the check boxes on the line for the user or group.

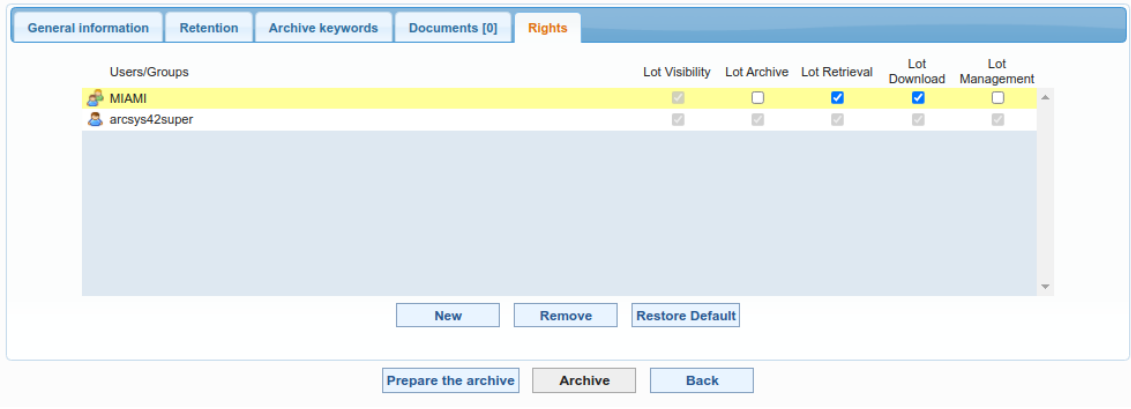

Figure 6.5. "Permissions" tab in Creating/Editing a Record

7. Searching for a Record

The search form (Figure 7.1, “Searching for a record” [21]) is available when clicking on the "Search" entry of the end user menu.

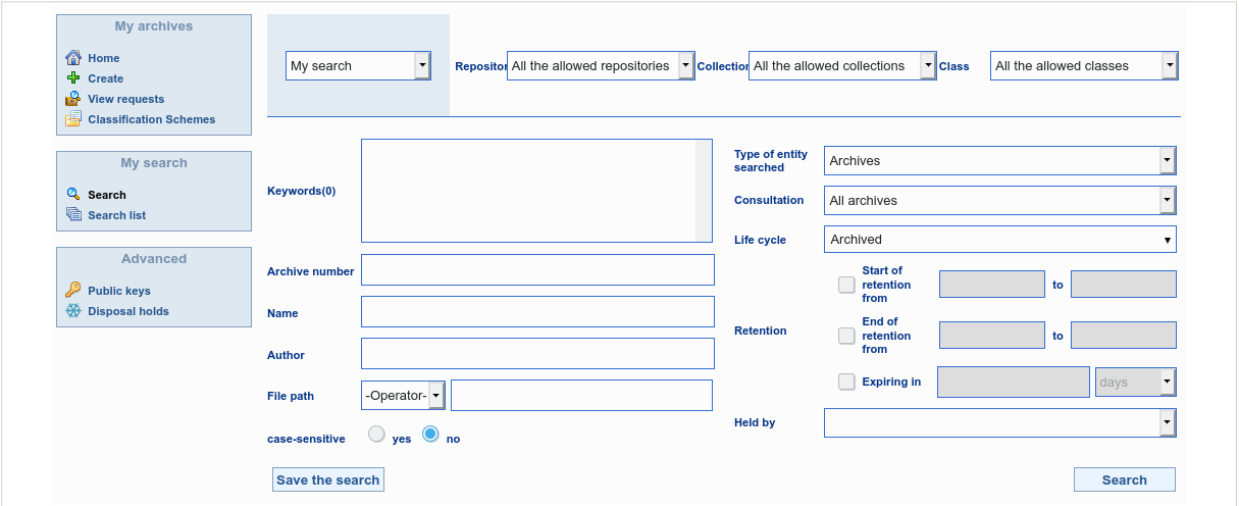

Figure 7.1. Searching for a record

7.1. Criteria

7.1.1. Loading a previous search field

The upper right field, named "My search", enables you to load previously saved search. Loading a search will automatically populate the values of the search criteria.

7.1.2. Basic criteria fields

By default the search occurs on all repositories, all collections and all classes. The upper part of the screen enables you to choose a specific repository, collection or class to use to restrict the search.

Important

Please note that the "Keywords" field stays empty as long as a specific repository is not choosed.

7.1.3. Full text fields (ArcRFT Option)

- The field "Document contains" enables you to search for strings in **document contents**, indexed in GenericSearch. The syntax of the field is detailed in its tooltip.

- The field "Keyword contains" enables you to search for strings either in all indexed fields (including document contents if they are properly indexed) or in specific fields only. The syntax of the field is detailed in its tooltip.

The full text fields may be used in addition to other fields.

7.1.4. Other fields

The other fields enables to search for archives by various criteria:

- metadata; please note that this field stays empty as long as a specific repository is not choosed.
- archive number;
- archive author (name of the LDAP user that created the archive);
- file path (part or complete path);
- type of entity searched (archive or document). This choice will have a consequence on what is displayed in the results view, and on the available actions (the available actions on a document are not the same as the actions available on an archive).
- consultation status (available for synchronous retrieval);
- life cycle: Awaiting Archiving, Expired, or Archived ; a combination of criteria may be performed (a OR clause is applied between them). By default, the returned archives are in any state of their life cycle.
- retention characteristics: you may search for archives start of retention, or end of retention. The end of retention may be a variable range (a given number of days, months or years). This is particulary useful for a saved search. For example, you can search for archives which end next year.

Important

Searching for end of retention characteristics is possible only for archives which have a retention schedule.

- hold;
- Workflow status.

7.1.5. Customizing the screen

The Arcsys Administration Manual details the way to customize the fields displayed in this screen by using the `WEBAGENT_guipreferences.xml` configuration file. Thus, some fields listed in this manual might not be displayed depending on the users.

7.2. Results

7.2.1. Display mode

The results are displayed on the same page as the criteria (the page automatically scrolls down to the results). Three display modes are available:

- Tree mode;
- Table (default view);
- Classification scheme.

7.2.1.1. Tree mode

The result is divided into two panes: the left pane contains the tree structure and the right contains a data display area.

The tree mode displays the documents in a tree with four types of nodes: repositories, collections, archives, and files.

Actions (page 24, « Available actions ») are available on a contextual menu when right-clicking on a node.

7.2.1.2. Table mode

The table mode displays the archives or the documents with configurable columns. A Parameters button on the right of the screen enables you to choose the displayed columns. Please note that some of these columns might not be sortable.

Actions may be performed either by using the contextual menu (by right-clicking on the bottom arrow in front of the line), or by choosing an action at the bottom of the page.

Actions (see page 24, « Available actions ») are available at the bottom of the page either:

- On selected archives;
- On all results of the current page;
- On all results of all pages.

7.2.1.3. Classification scheme

The tree only contains the classes that are included in the lots or objects found following the search.

The root node is the classification scheme associated with the repository in which the search was made. The following nodes are the child classes for which at least one lot/object has been found during the search.

All the leaf nodes on the tree are therefore lots/objects.

Each Lot node can be expanded as a subtree in file explorer format to view the objects it contains.

The lot is not displayed unless it contains objects.

Actions (page 24, « Available actions ») are available on a contextual menu when right-clicking on a node.

Note

Collections are never displayed in a classification scheme tree.

7.3. Available actions

Whatever the display mode chosen, the following actions are available on an archive:

- Open a separate page, if this is authorized, to Modify, Archive, or Retrieve an archive;
- Delete an archive. This operation may be asynchronous if many objects are contained by the archives;
- Download or View an archive. The created file consists of a ZIP file containing all the files of the archive.
- Create a hold on the archive;
- Create an Excel export.

8. Record Description

8.1. Access

The screen enabling the description of a record to be viewed can be accessed from the search result screen (see chapter Searching for a record):

The link to the record description screen is represented by the clickable icon located in the action column for each record found.

This screen is the same as the create/edit a record screen (see the chapter Creating/ Editing a Record) with the following differences:

- The screen is read-only. Data of the record cannot be changed.
- In the **Documents** tab, the icon  lets you display or download the document online (see the chapter Synchronously retrieving)
- If there is a disposal hold on a record, the Disposal Hold tab will appear.

9. Deleting a Record

9.1. Access

A record can be deleted by accessing it in a search result screen (see chapter Searching for a record). You can delete a record using the clickable icon ✕ located in the actions column for each deletable record found (only prepared non-archived records or records reaching the end of their retention period can be deleted).

For undeletable records, the icon is grayed out and cannot be clicked.

A click on the icon ✕ generates a deletion confirmation request. By confirming, the record is deleted; otherwise, the delete request is ignored.

9.2. Confirmation

The following screen (Figure 9.1, “Confirmation of Record Deletion” [26]) confirms correct progress when deleting a record.

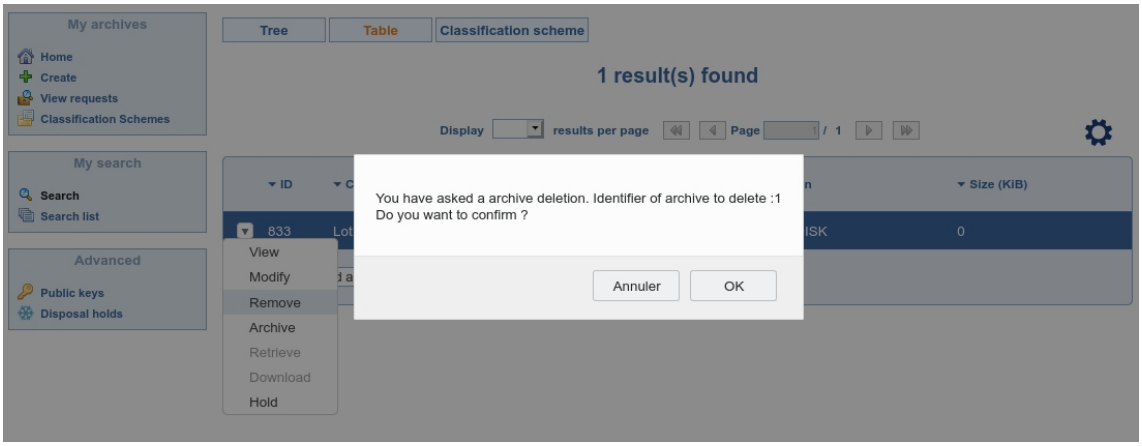

Figure 9.1. Confirmation of Record Deletion

10. Archiving

10.1. Access

A “prepared record” can be archived by accessing it from a search result screen. A record can be archived using the clickable icon located in the actions column for each record found (only prepared, non-archived records can be archived).

For non-archivable records, the icon is grayed out and cannot be clicked.

Clicking on the icon systematically generates a confirmation request. By confirming the request, an archiving request is created for the chosen record; otherwise, the request is ignored.

10.2. Confirmation

The following screen (Figure 10.1, “Confirmation of Archiving Request Creation” [27]) confirms correct progress when creating an archiving request.

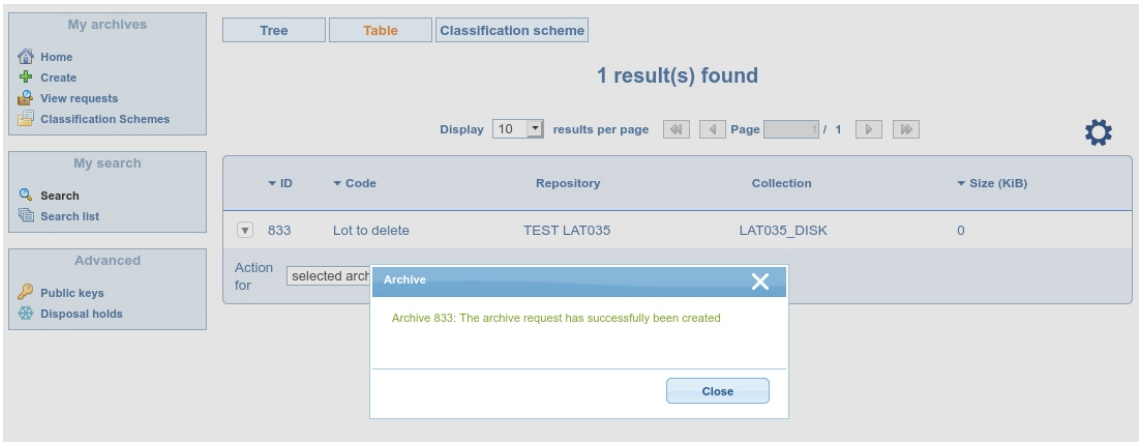

Figure 10.1. Confirmation of Archiving Request Creation

11. Retrieval

11.1. Access

A record can be retrieved by accessing it from a search result screen (see chapter Searching for a record). Access the first retrieval screen using the clickable icon located in the action column for each deliverable record found (only archived records can be retrieved).

For non-deliverable records, the icon is grayed out and cannot be clicked.

Exception:

If you have lot display rights but not retrieval rights, you can expressly request that the administrator provide that right by clicking on the Envelope icon.

The icon (impossible to retrieve) will remain visible until the administrator accepts and processes the request.

11.2. Step 1

The following screen (Figure 11.1, “First Step in Retrieving a Record” [29]) is the first step in retrieving the record. It lets you:

- Choose whether retrieval is to be total or partial, i.e. if the record should be retrieved in full or only certain elements should be retrieved. A partial retrieval can be performed using the retrieve by item selection, or by using a path-based retrieval (retrieving all the items where the path starts with the indicated path).
- Access the selection definition screen by pressing the **Define selection** button.
- Choose if the record should be retrieved to its original location or another location that must be taken.
- Create a retrieval request using the **Retrieve** button.

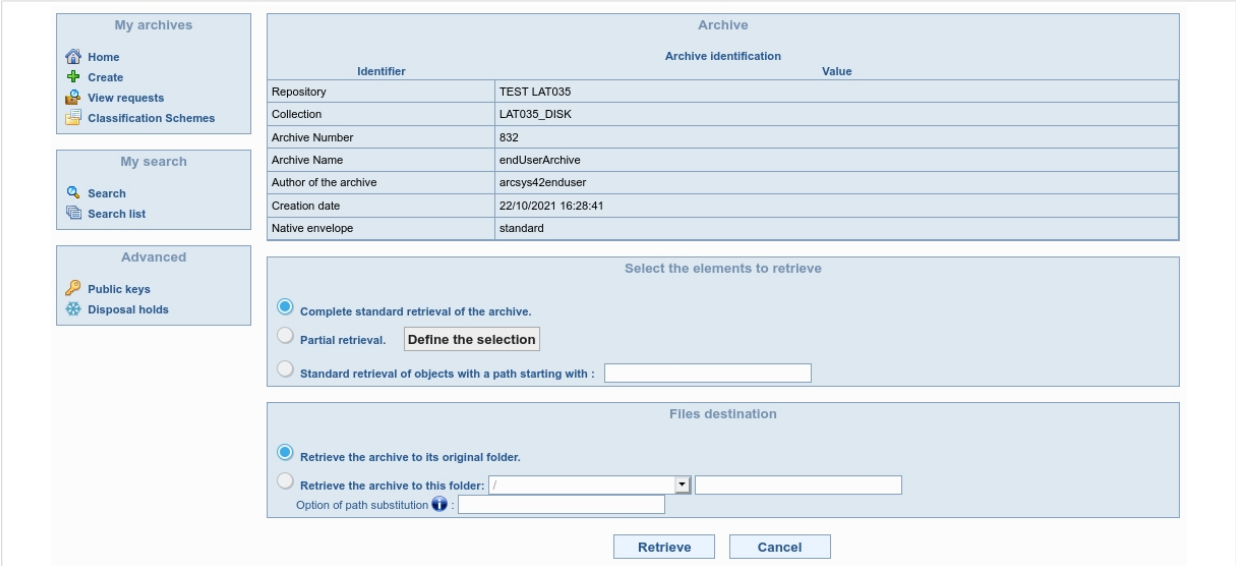

Figure 11.1. First Step in Retrieving a Record

11.3. Step 2 (optional)

The following screen (Figure 11.2, “Second Step in Retrieving a Record” [30]) constitutes the second step in retrieving a record, which consists of a partial selection of the record to be retrieved (this step is optional).

This screen is used to:

- Mark all the files and folders to be retrieved. If a folder is selected, all the files in the folder will be selected.
- Apply partial selection using the **Apply selection** button.
- Cancel the selection using the **Cancel** button, which returns to the previous screen ignoring any partial selection.
- View online with the icon (See the chapter Synchronously retrieving).

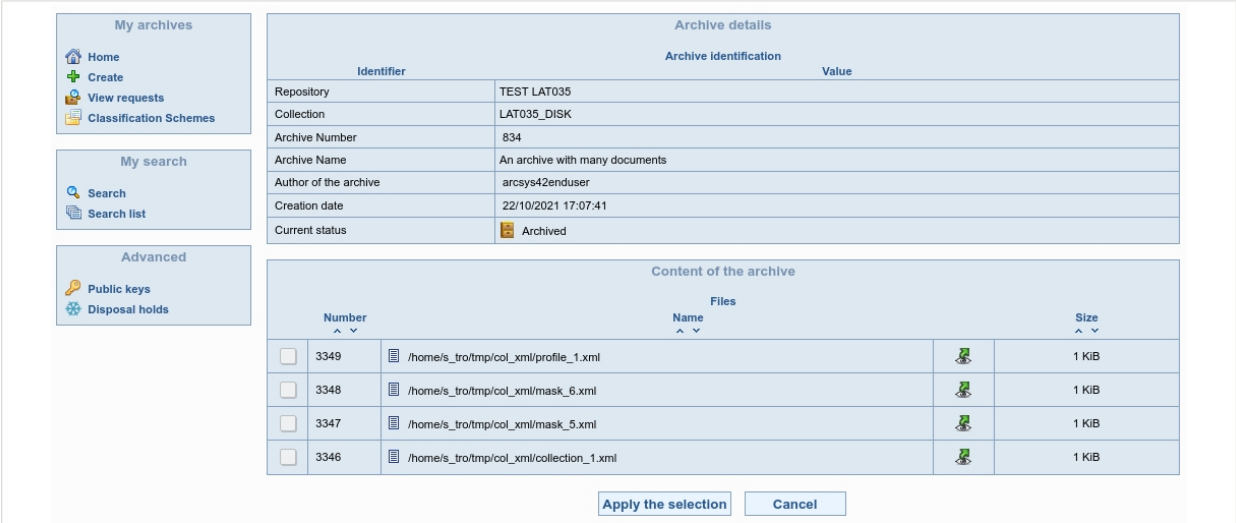

Figure 11.2. Second Step in Retrieving a Record

11.4. Confirmation

The following screen (Figure 11.3, “Confirmation of Record Retrieval” [30]) confirms correct progress when creating a record retrieval request.

If the record belongs to at least one category, a confirmation window is displayed. To continue the retrieval, you must validate all the categories to which the record belongs.

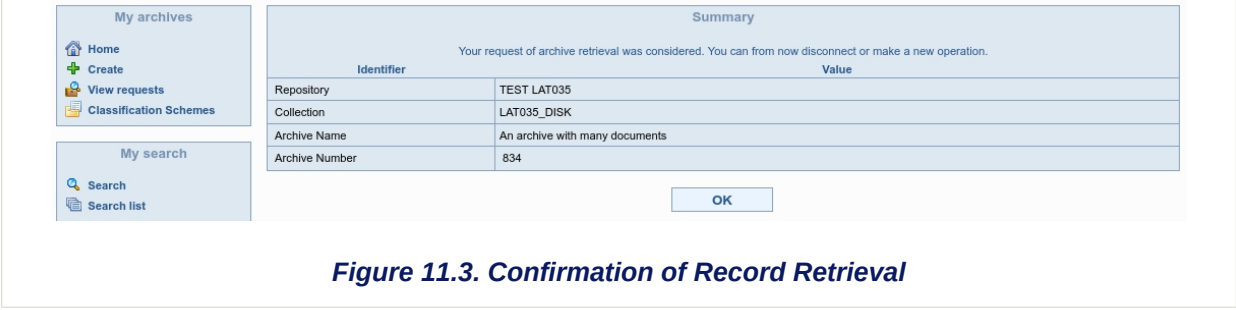

Figure 11.3. Confirmation of Record Retrieval

12. Downloading

12.1. Overview

You can download records or objects using the **Download** dialog box.

12.2. Access

You can download using the icon  located on each object line of a record (*available on the pages where you can see these objects*) as well as on each line of the record search result. This function is available only if the record is archived.

12.3. Downloading

After clicking on the icon, the **Download** dialog box opens. If more than one record or more than one object from different records are selected, the **Create a folder per record** option (Figure 12.1, “Downloading Records/Objects Option” [31]) appears. Use this option to separate downloaded objects into separate directories (*with the name of the parent record of the object*); these directories are located in a ZIP file. Then click **Continue** to display the progress of the download. When the download is ready, to download your selection, click **Create a folder per record** (Figure 12.2, “Downloading Records/Objects” [32]).

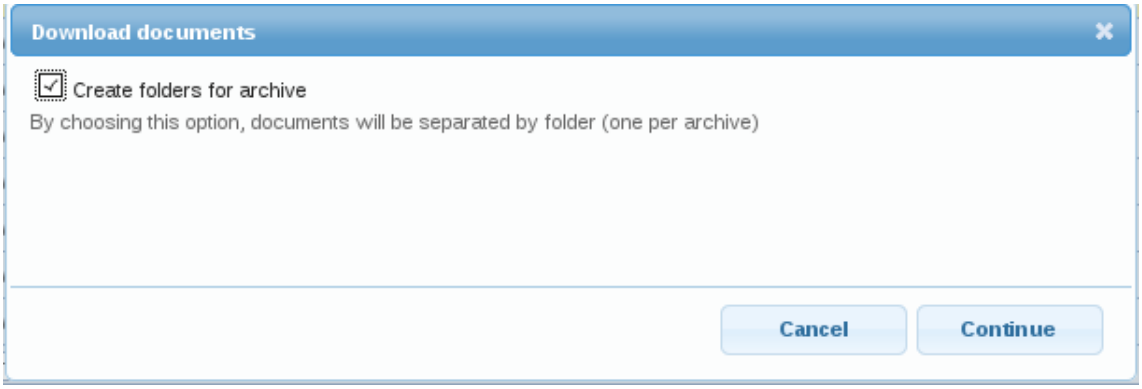

Figure 12.1. Downloading Records/Objects Option

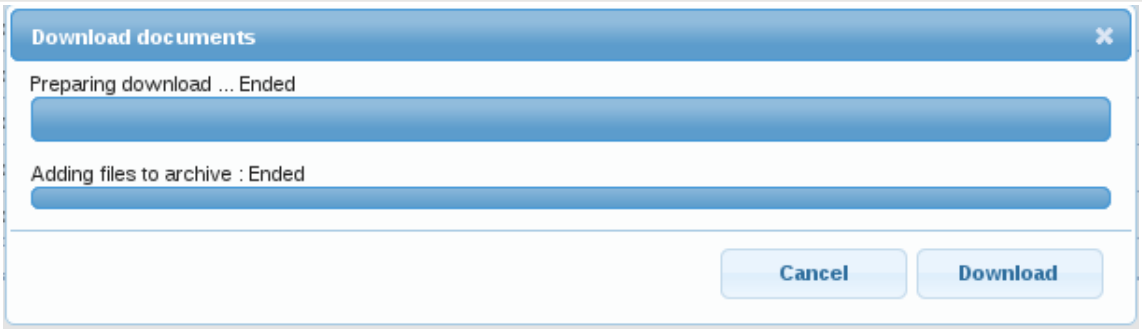

Figure 12.2. Downloading Records/Objects

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

13. Viewing Online

13.1. Overview

You can view objects online using the **Download** dialog box.

13.2. Access

Access synchronous retrieval by clicking the icon located on each row of objects in a record (*available on pages where you can see these objects*). This synchronous retrieval mode is only possible if the record can be viewed online, i.e. it is archived and each file contained in the record can be viewed.

13.3. Retrieving synchronously

After clicking on the icon, the **Download** dialog box opens displaying the progress of the download. When the download is ready, to display your object, click on **Display** (see Figure 13.1, “Object Synchronous retrieval” [33]).

Figure 13.1. Object Synchronous retrieval

14. Viewing Requests

14.1. Overview

A list of archiving, retrieval and synchronous retrieval requests can be viewed.

14.2. Access

To access requests, simply click on **See requests** in the side menu.

This new page prompts you to:

- Select a repository from a list. If you can only access one repository, it is automatically selected:
- Select the type of request (archiving, retrieval or synchronous retrieval).
- Select the repository involved in the requests.
- Select all requests from all users or only one user's requests.

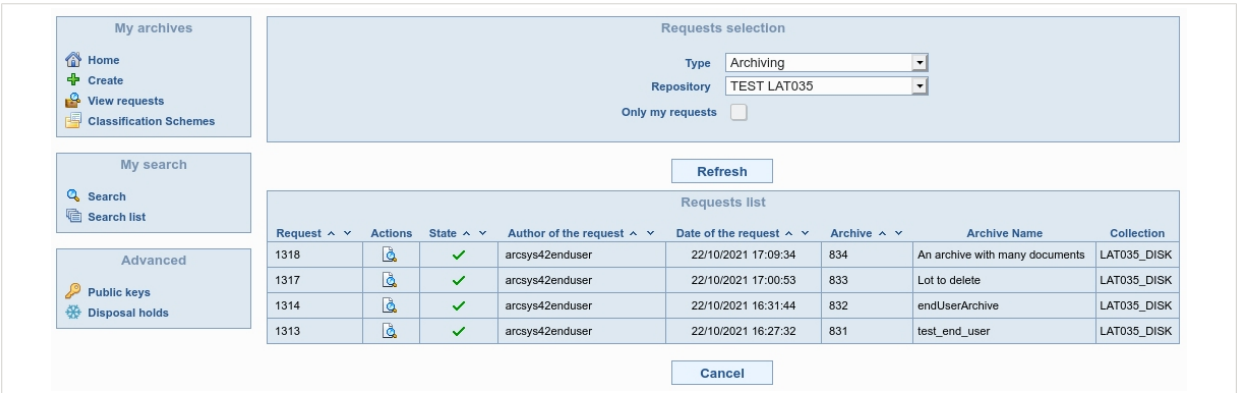

Figure 14.1. Choice of Parameters for Viewing Requests

14.3. List of Requests

The following screen (Figure 14.2, "Viewing Requests" [35]) lets you:

- View the list of requests for the selected repository.
- Get details on the status of requests by clicking on the icons representing the status of the displayed requests.

The different request status conditions include:

- ✔ Successful requests

- ✕ Failed requests
- **In progress**: request in progress
  - Access the description of a record by using the clickable icon located to the left of each record name.

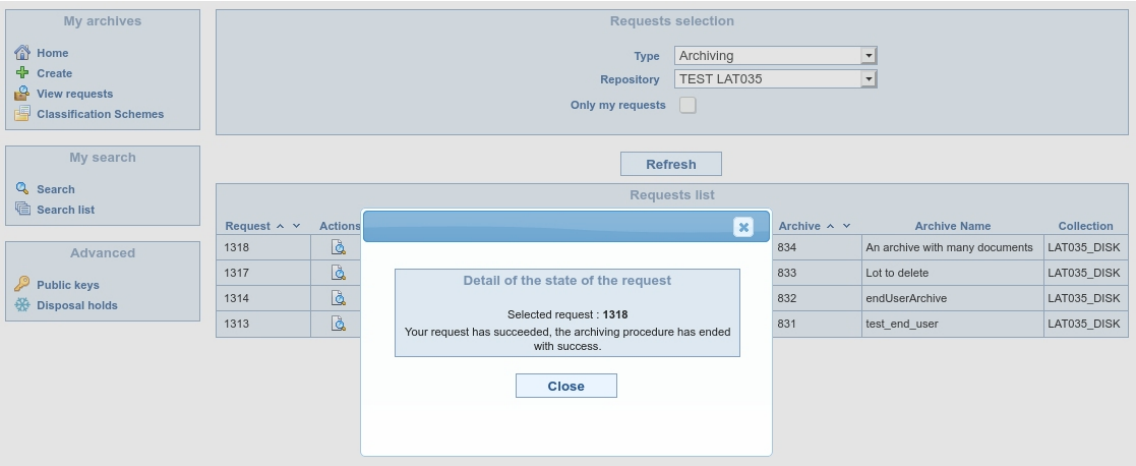

Figure 14.2. Viewing Requests

14.4. Detail of the Request Status

Clicking on one of the status icons opens a pop-up window with the description of the status of the request associated with the icon.

If the status is “error”, a **Contact administrator** button takes the user directly to the contact administrator screen (see the next chapter) with a pre-completed message concerning the request.

15. Managing Disposal Holds

Most of the screens enabling disposal hold management can be accessed by choosing **Disposal Hold Management** in the advanced section of the end-user menu. You must have sufficient rights to access this menu.

This menu is used to:

- List and search disposal holds.
- View an existing disposal hold.
- Edit an existing disposal hold.
- Delete a disposal hold.

Note

You can create a disposal hold in the result screen for record searches.

15.1. List

The following screen (Figure 15.1, “Disposal Hold List” [36]) lists active disposal holds. The search bar allows you to add a filter for the disposal hold ID.

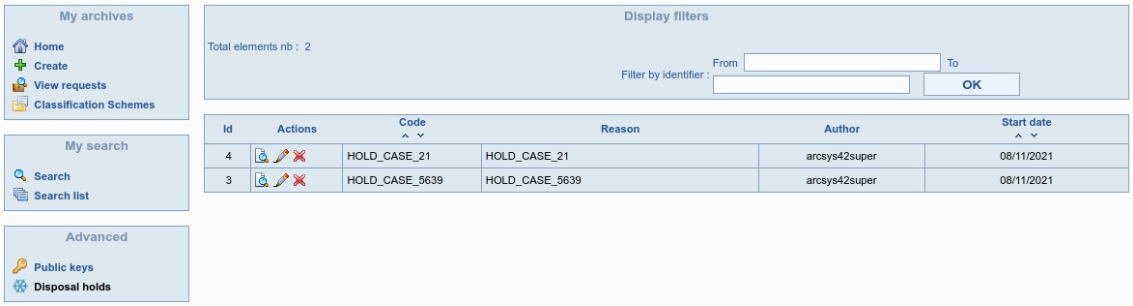

Figure 15.1. Disposal Hold List

15.2. Display

You must click on the View icon to access the page where an existing disposal hold can be displayed.  . Available information includes the code, reason, author and date of creation of the disposal hold (Figure 15.2, “Viewing a Disposal Hold” [37]).

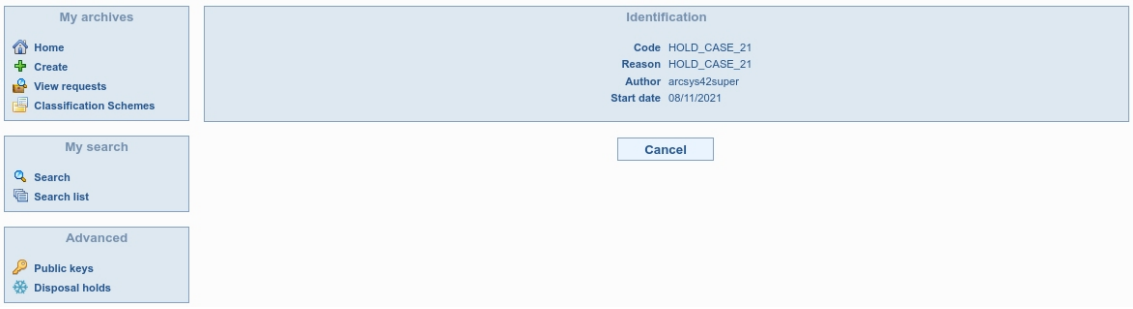

Figure 15.2. Viewing a Disposal Hold

15.3. Editing

For each disposal hold that can be edited, the icon is enabled. By clicking on this button, you access the edit page for a disposal hold.

The fields and features shown on the disposal hold editing screen are identical to those shown on the display screen, except that the code and reason can be edited (Figure 15.3, “Editing a Disposal Hold” [37]).

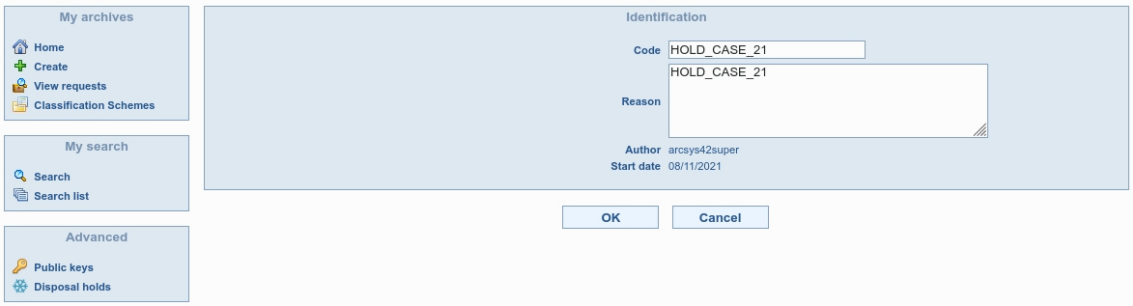

Figure 15.3. Editing a Disposal Hold

15.4. Deleting

For each disposal hold that can be deleted, the icon is enabled. By clicking on this button, a confirmation window is displayed (Figure 15.4, “Deleting a Disposal Hold” [38]). To validate the deletion, you must first enter a reason for deleting the disposal hold. The selected disposal hold is deleted from the Arcsys Database.

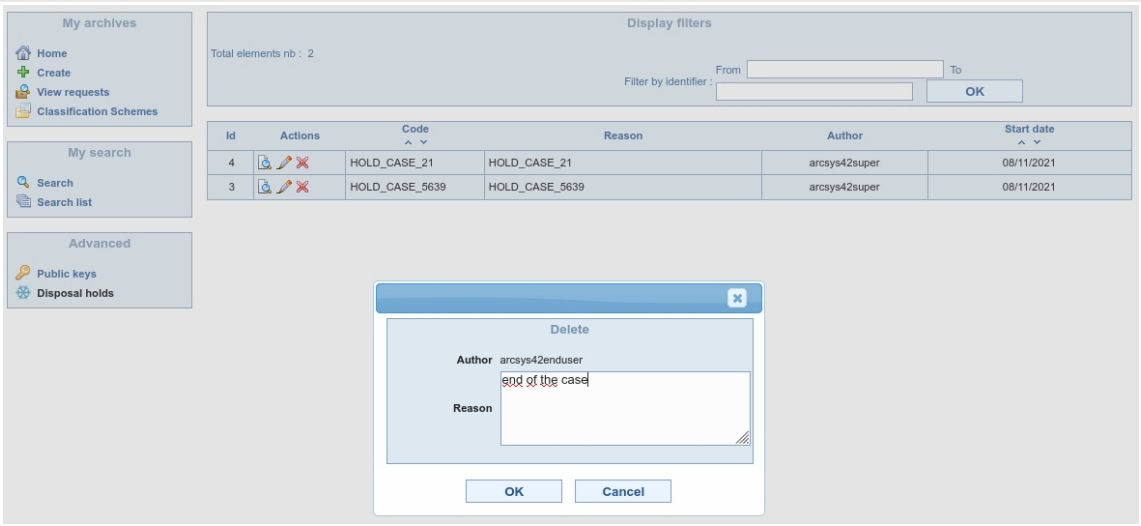

Figure 15.4. Deleting a Disposal Hold

16. Classification Scheme

The Classification Scheme can be displayed (administrators can modify it in a specific screen). Access it by clicking on the Classification Scheme submenu in the End User menu.

16.1. Overview

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

All classification schemes are available in the tree root (reminder: there is one classification scheme for each available repository in the Arcsys system).

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.

16.2. 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.

For each file, you have the following information: file rights, size and date of last modification.

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

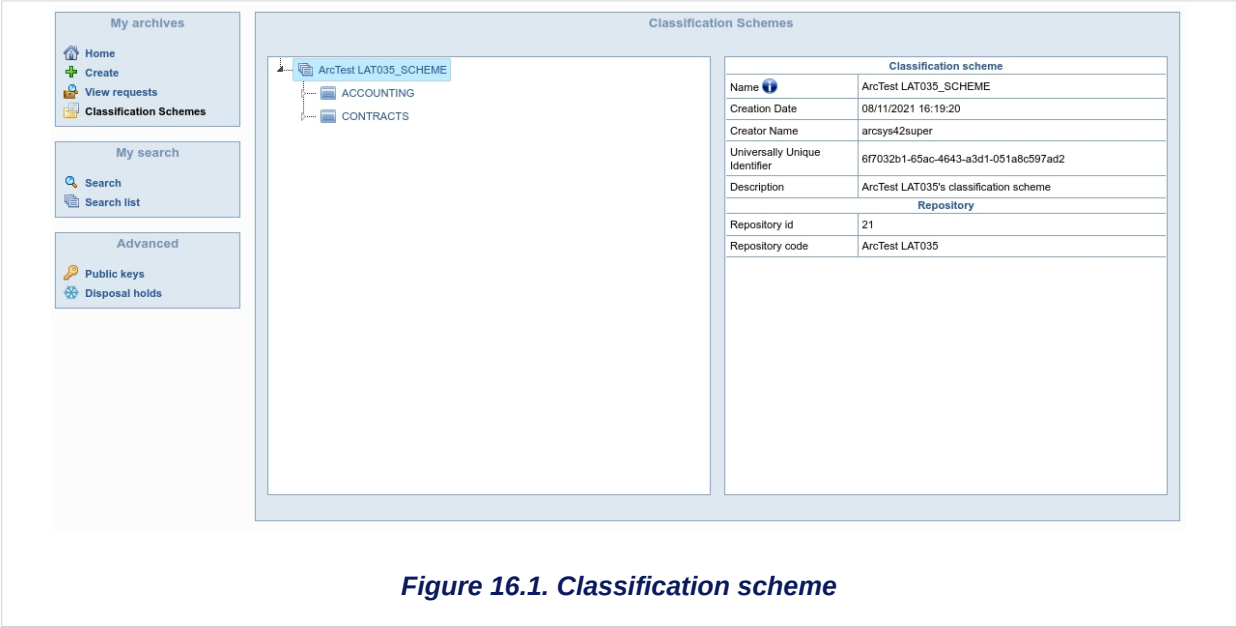

Figure 16.1. Classification scheme

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

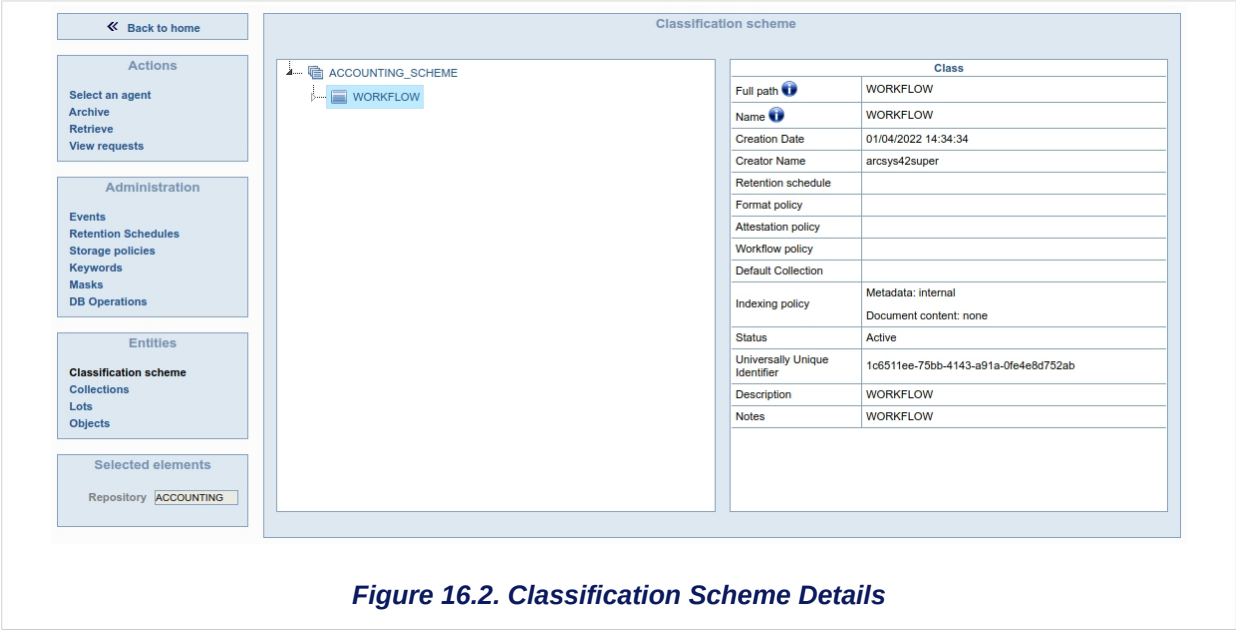

Figure 16.2. Classification Scheme Details

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

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)

- 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**.

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

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.

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.

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.

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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