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Arcsys Web

Arcsys Web Interface User Manual

25.2.STS
July 3, 2025

infotel.com

Version: 25.2.STS

Publication date of the document: 2025-07-03

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Table of Contents

Preface 12
1. Introduction 12
2. Reference Documents 12
2.1. Concepts 12
2.2. Installing and Updating 12
2.3. Operations 12
2.4. GUI 13
2.5. Development 13
2.6. Option guides 13
2.7. Optional modules 13
3. Symbols and Meanings 13
4. Definitions and Abbreviations 13
1. General overview 1
1. Overview 2
1.1. Principles 2
1.1.1. Design 2
1.1.2. Error Pages 2
1.1.3. List of Elements: Advanced Functionalities 3
1.2. Internationalization 3
1.3. Concepts 4
2. Functions: How do I...? 5
2.1. Creating a storage policy 5
2.1.1. Instructions 5
2.1.2. Physical Media 5
2.1.3. Creating a storage policy 5
2.1.4. Associating Storage Policies–Storage Zones 5
2.2. Archiving a File List 6
2.2.1. 1 – Creating a Mask 6
2.2.2. 2 – Creating Keywords 6
2.2.3. 3 – Assigning Keywords 6
2.2.4. 4- Creating a Storage Policy 6
2.2.5. 5 – Creating a Collection 7
2.2.6. 6 – Creating a Lot 7
2.2.7. 7 – Creating Objects 7
2.2.8. 8 – Selecting an Agent 7
2.2.9. 9 – Creating the Archiving Order 7
2.2.10. Retrieval 7
2.3. Searching for a Record 8
2. Detailed Overview 9
1. Identification 10
2. Data Management 11
2.1. Managing and Selecting Repositories 11
2.1.1. Selection 11

2.1.2. Creation 12
2.1.3. Edition or Display 13
2.1.4. Export 13
2.1.5. Managing Exports 14
2.1.6. Importing a Repository 14
2.1.7. Deletion 14
2.2. Managing Classification Schemes 15
2.2.1. General 15
2.2.2. Details 15
2.2.3. Edition 17
2.2.4. Possible Actions 17
2.2.5. Changing Classification Scheme Details 18
2.2.6. Editing the Details of a Class 18
2.2.7. Adding a Class 19
2.2.8. Displaying/Editing Permissions 20
2.3. Managing and Selecting Collections 20
2.3.1. List 21
2.3.2. Selection 21
2.3.3. Creation 21
2.3.4. Edition or Display 24
2.3.5. Changing the Storage Policy and the Mask 25
2.3.6. Deletion 26
2.3.7. Export 26
2.3.8. Managing Exports 26
2.3.9. Import 27
2.4. Managing and Selecting Lots 27
2.4.1. List 28
2.4.2. Selection 28
2.4.3. Creation 28
2.4.4. Editing or Displaying 30
2.4.5. Managing Metadata 32
2.4.6. Deletion 33
2.4.7. Copy 34
2.4.8. Classification 34
2.5. Managing Objects 34
2.5.1. List 34
2.5.2. Creation 35
2.5.3. Edition 39
2.5.4. Managing Metadata 40
2.5.5. Deletion 40
2.6. Managing Public Keys 40
2.6.1. List 41
2.6.2. Display 41
3. Indexing 42
3.1. Managing and Selecting Keywords 42

3.1.1. List 42
3.1.2. Selection 42
3.1.3. Creation 43
3.1.4. Edition 45
3.1.5. Managing Controlled Types 46
3.1.6. Deletion 47
3.2. Managing and Selecting Masks 48
3.2.1. List 48
3.2.2. Selection 48
3.2.3. Creation 49
3.2.4. Edition 49
3.2.5. Export 49
3.2.6. Managing Exports 50
3.2.7. Import 50
3.2.8. Managing Keywords Associated with the Mask 51
4. Retention Schedule 54
4.1. Managing Retention Schedules 54
4.1.1. Event 54
4.1.2. Retention schedule 54
5. Configuring Sites and Arcsys Engines 56
5.1. Managing Sites 56
5.1.1. List 56
5.1.2. Creation 57
5.1.3. Edition 57
5.1.4. Deletion 57
5.2. Managing Arcsys Engines 57
5.2.1. List 58
5.2.2. Display 58
6. Managing Arcsys Transfer Servers 60
6.1. List 60
6.2. Display 60
7. Managing Arcsys Transfer Services 62
8. Storage 63
8.1. Managing Zones 63
8.1.1. List 63
8.1.2. Creation 64
8.1.3. Display or Edition 67
8.1.4. Deletion 67
8.2. Displaying Zone Check Status 67
8.2.1. List 67
8.3. Managing and Selecting Storage Policies 68
8.3.1. List 68
8.3.2. Selection 69
8.3.3. Creation 69
8.3.4. Edition 70

8.3.5. Export 70
8.3.6. Managing Exports 70
8.3.7. Import 71
8.3.8. Managing Associated Pools 71
8.3.9. Adding a Zone to a storage policy 71
8.3.10. Adding a New Zone to a Sequence Already Created 73
8.3.11. Changing a Zone 73
8.3.12. Deleting a Zone 73
8.3.13. Displaying a Zone 73
8.3.14. Note 74
9. Archiving, Retrieving and Migrating 75
9.1. Archiving: Creation 75
9.1.1. Entering Keyword Values 75
9.1.2. Choosing the Priority 75
9.1.3. Retention Start Date 76
9.2. Retrieval: Creation 76
9.2.1. Elements to Retrieve 77
9.2.2. Choosing Objects for Partial Retrieval 78
9.2.3. Online Retrieval of an Object 79
9.2.4. Retrieving to the Retention Zone 80
9.3. Request List 80
9.3.1. Contents of a Lot 81
9.3.2. Details of the Request 82
9.3.3. Displaying Jobs 83
9.3.4. Displaying Job Actions 84
9.4. Listing and Selecting Agents 85
9.4.1. List 85
9.4.2. Selection 85
10. Permissions Administration 86
10.1. Permissions Administration 86
10.1.1. Selecting the User to Whom the Entities will be Transferred 86
10.1.2. Displaying the Entities Relative to a User 86
11. Media Manager Administration 88
11.1. Media Manager Administration 88
12. Hardware Management 89
12.1. Tape library Management 89
12.1.1. List 89
12.1.2. Locking/Unlocking a Tape library 90
12.1.3. Displaying Details 91
12.2. Drive Management 92
12.2.1. List 92
12.2.2. Display 94
12.2.3. Edition 97
12.2.4. Associated Zones 98
12.3. Tape Management 99

12.3.1. Tape List 100
12.3.2. Locking/Unlocking a Tape 103
12.3.3. Excluding a Tape 104
12.3.4. Display 104
12.3.5. Edition 108
12.4. Managing Tape Types 109
12.4.1. Tape Type List 110
12.4.2. Display 111
12.4.3. Edition 111
12.5. Managing File Systems 112
12.5.1. File System List 112
12.5.2. Search Criteria 113
12.5.3. Creating a File System 114
12.5.4. Locking/Unlocking a File System 115
12.5.5. Display 115
12.5.6. Edition 118
13. Reporting 120
13.1. Activity Monitor 120
13.1.1. Search Criteria 120
13.1.2. Job List 121
13.2. Anomalies Monitor 122
13.2.1. Search Criteria 122
13.2.2. Anomaly List 122
14. Search 124
15. Exporting to Microsoft Excel Format 125
15.1. Introduction 125
15.1.1. Screens with Microsoft Office Excel Export Option 125
15.2. Getting a Report in Microsoft Office Excel Format 125
15.2.1. Export Button 125
15.2.2. Saving a File 125
16. Business Continuity Plan 128
16.1. Lots Pending Recovery 128
16.1.1. Introduction 128
16.1.2. Page Description 128
16.2. Recovery: Monitoring 129
16.2.1. Recovery List 129
16.2.2. Contents of a Lot 130
16.2.3. Recovery Details 130
17. Logical Volume 132
17.1. Overview 132
17.1.1. Introduction 132
17.1.2. Access to Functions 132
17.2. Description of Volume Screens 132
17.2.1. General 132
17.2.2. Volume Type 133

17.2.3. Reset 134
17.2.4. Filters 134
17.2.5. Overview of Items 134
Glossary 136
Registered Trademarks 144

List of Figures

1.1. Error Page 3
1.2. Selecting a Language 4
1.1. Identification 10
2.1. Repositories List 11
2.2. Creating a Repository 12
2.3. Managing Repository Exports 14
2.4. Classification Scheme Details 16
2.5. Class Details 17
2.6. Changing a Classification Scheme 18
2.7. Changing the Details of a Class 19
2.8. Adding a Class 19
2.9. Changing a Permission 20
2.10. Collection List 21
2.11. Creating a Collection 22
2.12. Changing the Storage Policy and the Mask of a Collection 25
2.13. Managing Collection Exports 27
2.14. Lot List 28
2.15. Creating a Lot 29
2.16. Editing a Lot 31
2.17. List of the Metadata of a Lot 33
2.18. Object List 35
2.19. Creating an Object 36
2.20. Editing an Object 39
2.21. Viewing an Object 40
2.22. List of Public Keys 41
3.1. Keyword List 42
3.2. Creating a Keyword 43
3.3. Date Type Keyword 44
3.4. List of Controlled Values for a Keyword 47
3.5. Mask List 48
3.6. Creating a Mask 49
3.7. Managing Mask Exports 50
3.8. Managing a Mask's Keywords 51
3.9. Adding a Keyword to a Mask 52
5.1. Site List 56
5.2. Creating a Site 57
5.3. Engine List 58
5.4. Querying an Arcsys Engine 59
6.1. List of Arcsys Transfer Servers 60
6.2. Querying a Arcsys Transfer Server 61
8.1. Zone List 64
8.2. Creating a Zone 64
8.3. Check Status List 68

8.4. Storage Policies Lists 69
8.5. Creating a Storage Policy 69
8.6. Managing Storage Policy Exports 71
8.7. Storage Policy Zone List 72
8.8. Adding a Zone to a Storage Policy 73
9.1. Creating an Archiving Request - Entering Keyword Values 75
9.2. Creating an Archiving Request - Choosing the Priority 76
9.3. Retrieving a Complete Lot 77
9.4. Partial Retrieval of a Lot 79
9.5. Request List 81
9.6. Details of a Retrieval Request 82
9.7. Details of an Archiving or Synchronization Request 82
9.8. List of Jobs for a Request 83
9.9. List of Job Actions for a Job 84
9.10. Agent List 85
10.1. Selecting the User to Whom the Entities will be Transferred 86
10.2. User Entities List 87
11.1. Media Manager Administration Menu 88
12.1. Tape library List 90
12.2. Displaying tape library Details 91
12.3. List of Drives by Tape Library 93
12.4. Displaying Drive Details 94
12.5. List of Drive Anomalies 95
12.6. Tapes Types Associated with the Drive 95
12.7. List of Zones Associated with a Drive 96
12.8. Editing the Tape Types attached to a Drive 97
12.9. Associating a Tape Type with a Drive 97
12.10. Editing the Zones assotiated to a Drive 98
12.11. Attaching a Zone to a Drive 99
12.12. Tape List 100
12.13. Display of Tape List According to the Search Criteria 102
12.14. Displaying Tape Details 105
12.15. List of Tape Anomalies 107
12.16. List of Lots Present on the Tape 108
12.17. Editing a Tape 109
12.18. Tape Type List 110
12.19. Displaying Tape Type Details 111
12.20. Changing Tape Type Details 112
12.21. File System List 112
12.22. Creating a File System 114
12.23. Displaying a File System 116
12.24. Actions Attached to a File System 117
12.25. Errors encountered on a File System 117
12.26. Lots Present on a File System 118
12.27. Changing a File System 118

12.28. Transfer Servers Associated with a File System 119
13.1. Activity Monitor 120
13.2. Job Action List 121
13.3. Anomalies Monitor 122
15.1. Selecting to Save or Open a Report 126
15.2. Microsoft Office Excel File Generated 126
16.1. List of Lots Pending Recovery 129
16.2. Tracking Recoveries 130
16.3. Details of a Recovery 130
17.1. Logical volumetry by Repositories 133

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 in the next Long-Term Support release, Arcsys Core 2027.1.LTS, and replaced by the ArcWeb Module. ArcWeb will encompass all the current functionalities of the Arcsys Web Agent, plus several new features. Until the release of Arcsys Core 2027.1.LTS, 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-25.2.0.STS-en.pdf**

Arcsys Functional Description Manual: **Arcsys-functional-description-25.2.0.STS-en.pdf**

2.2. Installing and Updating

Arcsys Prerequisites Manual: **Arcsys-requirements-25.2.0.STS-en.pdf**

Arcsys Installation Manual: **Arcsys-installation-25.2.0.STS-en.pdf**

2.3. Operations

Arcsys Administration Manual: **Arcsys-administration-25.2.0.STS-en.pdf**

Arcsys Errors Manual: **Arcsys-error-25.2.0.STS-en.pdf**

2.4. GUI

Arcsys Web Interface User Manual: **Arcsys-web-25.2.0.STS-en.pdf**

Interface Guide: **Arcsys-web-end-user-25.2.0.STS-en.pdf**

2.5. Development

Arcsys API Manual: **Arcsys-api-25.2.0.STS-en.pdf**

2.6. Option guides

ArcHP Option Guide: **Arcsys-option-archp-25.2.0.STS-en.pdf**

ArcREF Option Guide: **Arcsys-option-arcref-25.2.0.STS-en.pdf**

2.7. Optional modules

BatchReporting: **BatchReporting-UserGuide-25.2.0.STS-en.pdf**

ClassAssigner: **ClassAssigner-UserGuide-25.2.0.STS-en.pdf**

MetadataReplacement: **MetadataReplacement-UserGuide-25.2.0.STS-en.pdf**

StartRetentionDateAssigner: **StartRetentionDateAssigner-UserGuide-25.2.0.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:

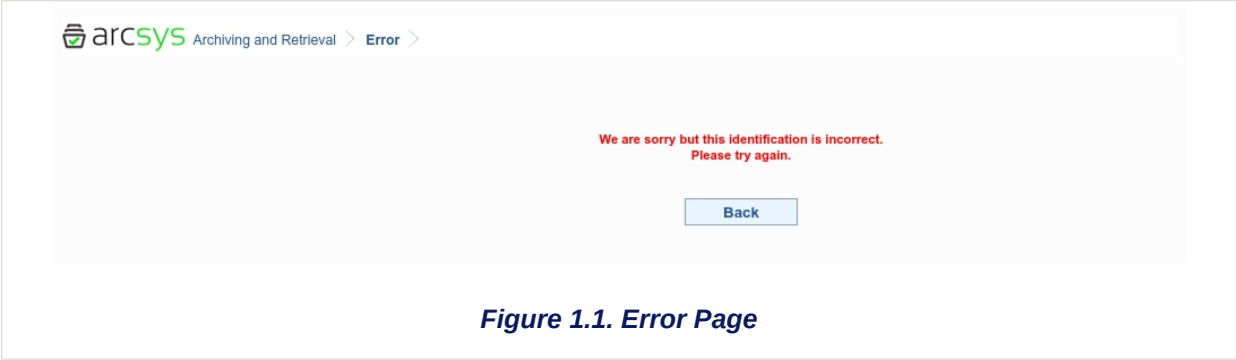


Figure 1.1. Error Page

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:

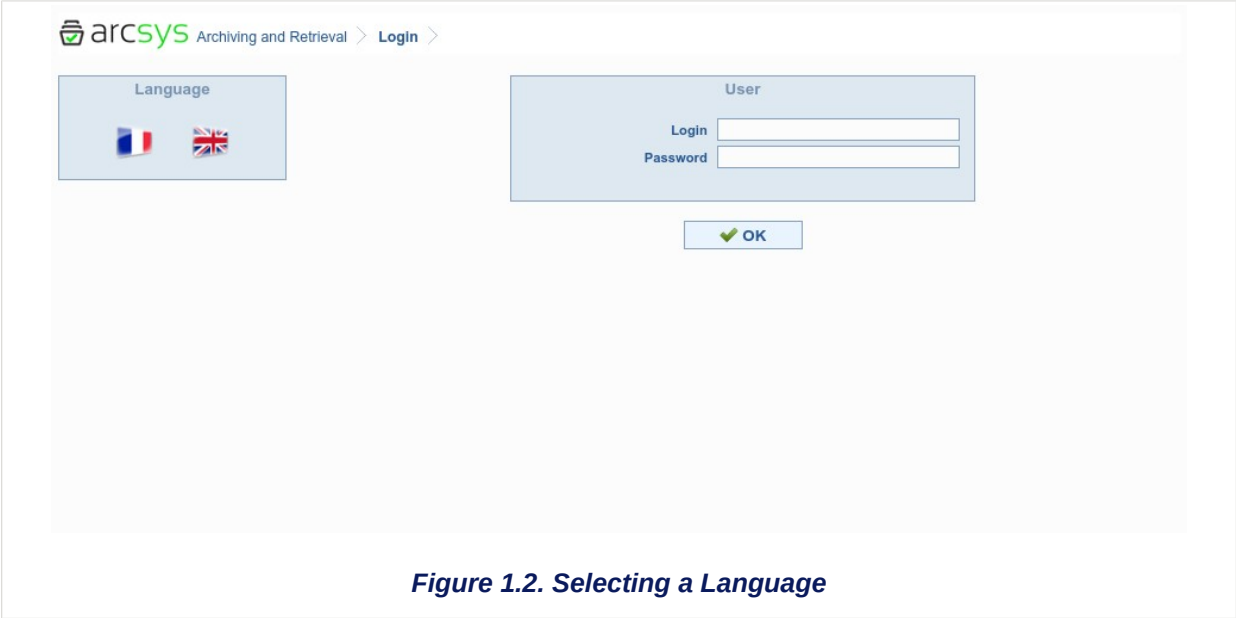


Figure 1.2. Selecting a Language

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 in 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.

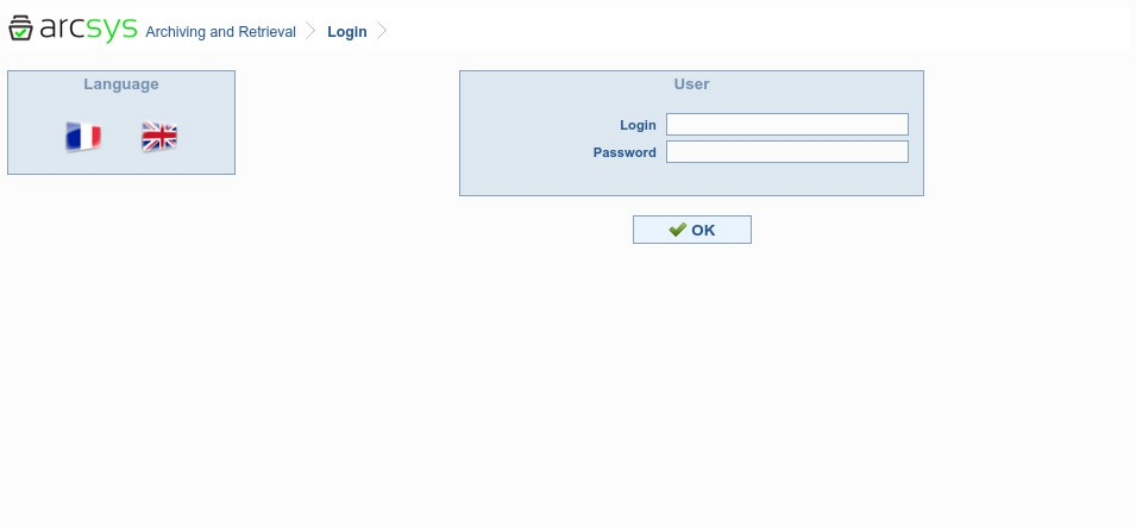


Figure 1.1. Identification

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.

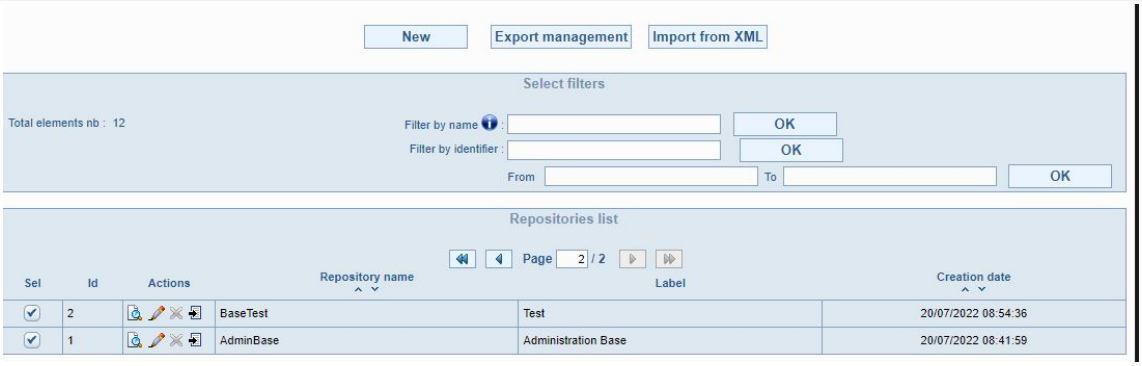


Figure 2.1. Repositories List

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]).

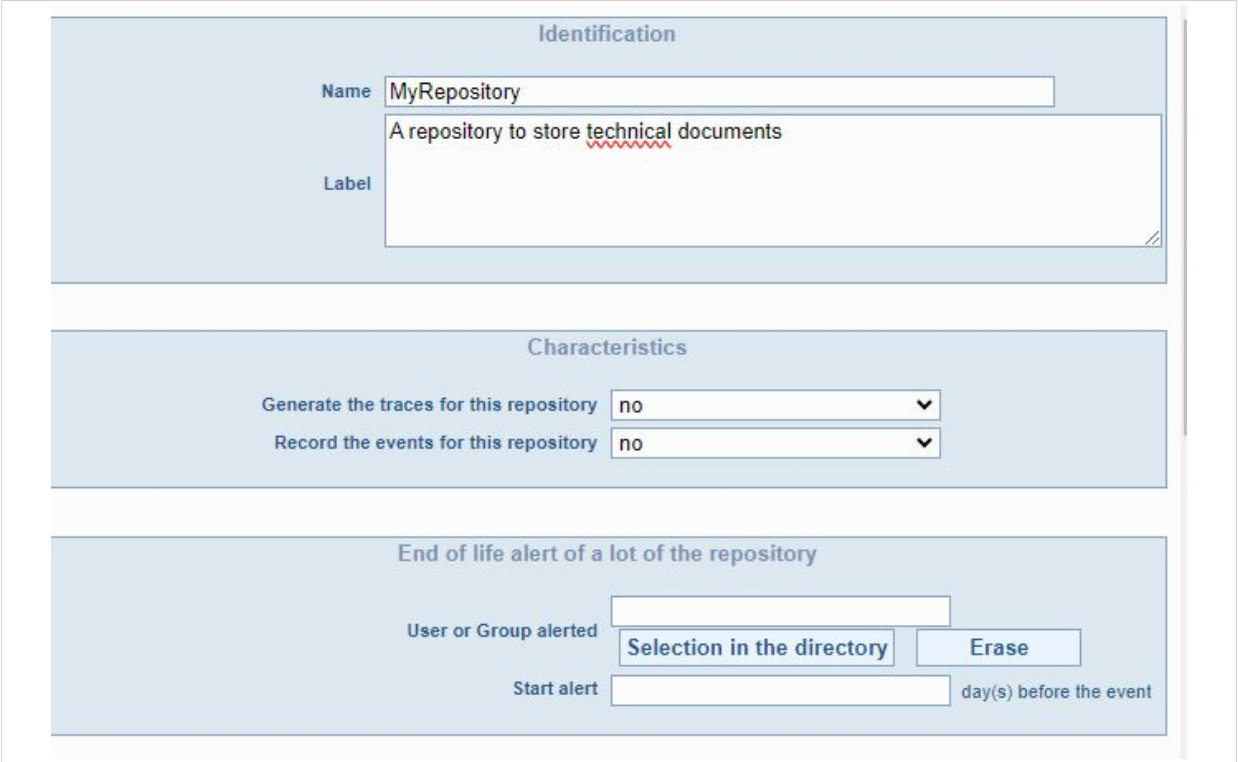


Figure 2.2. Creating a Repository

- **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).

- **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 *ST0CK_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).

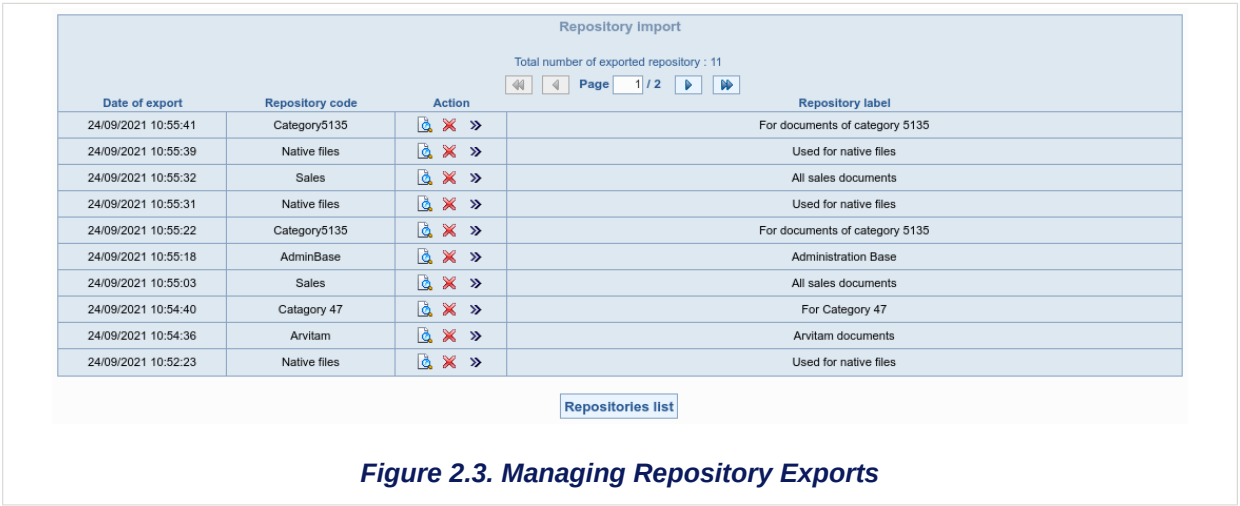


Figure 2.3. Managing Repository Exports

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

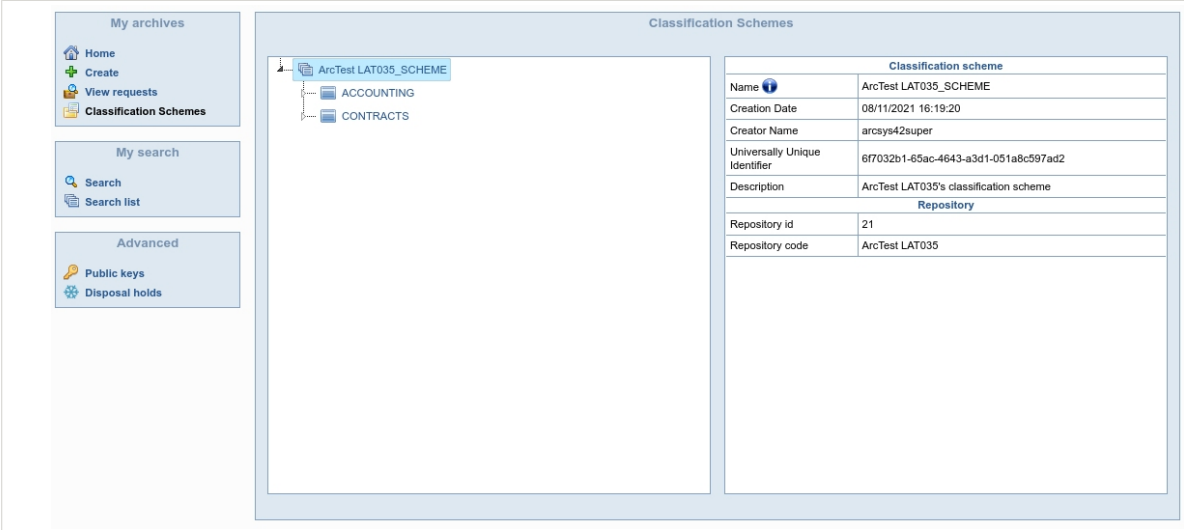


Figure 2.4. Classification Scheme Details

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

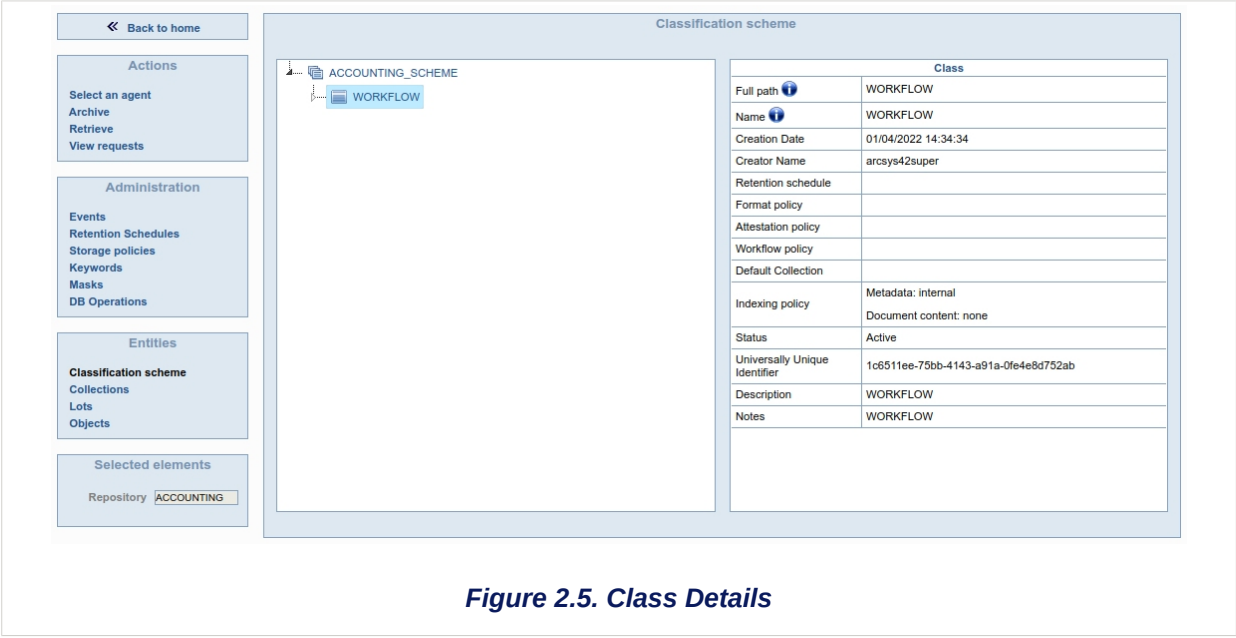


Figure 2.5. Class Details

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.

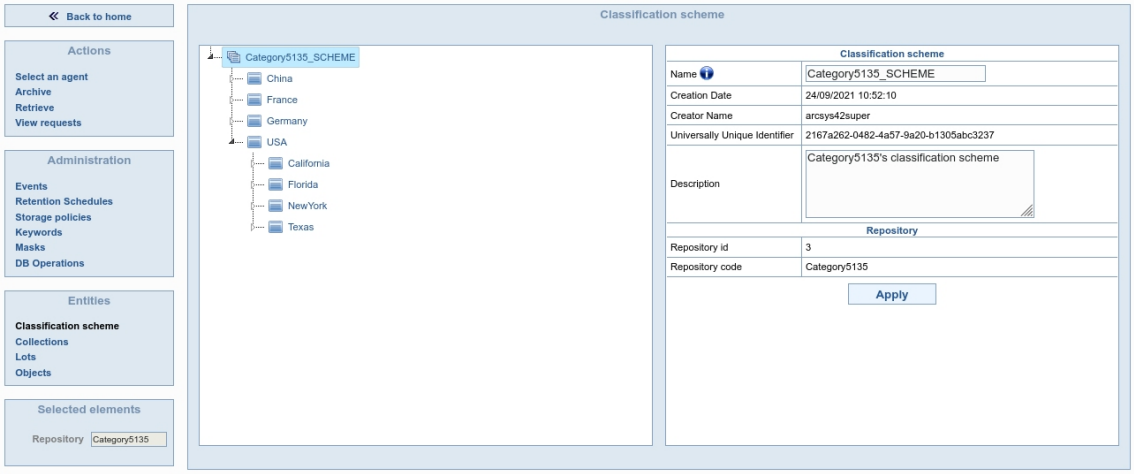


Figure 2.6. Changing a Classification Scheme

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.

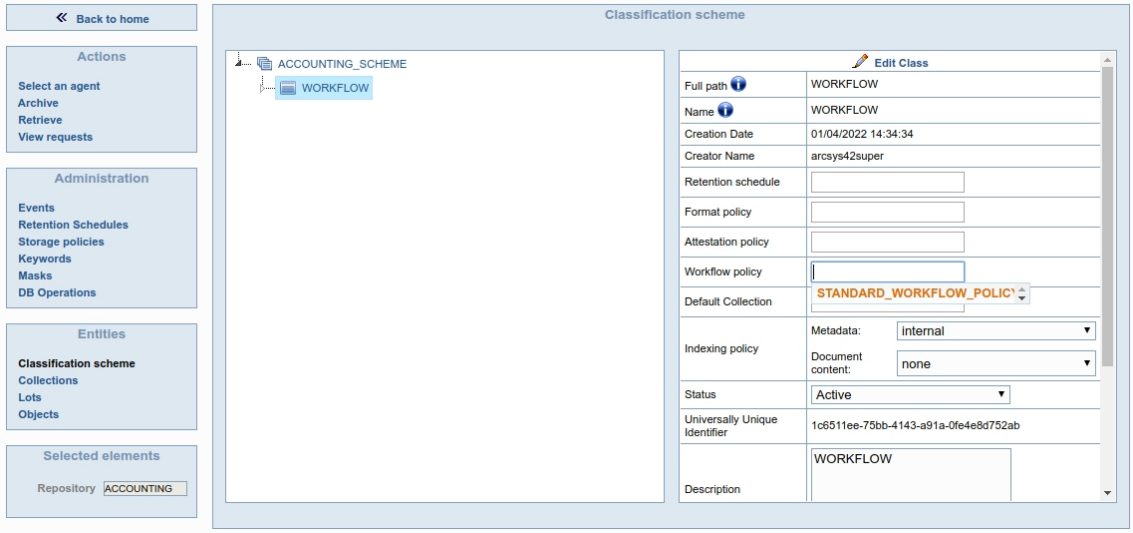


Figure 2.7. Changing the Details of a Class

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.

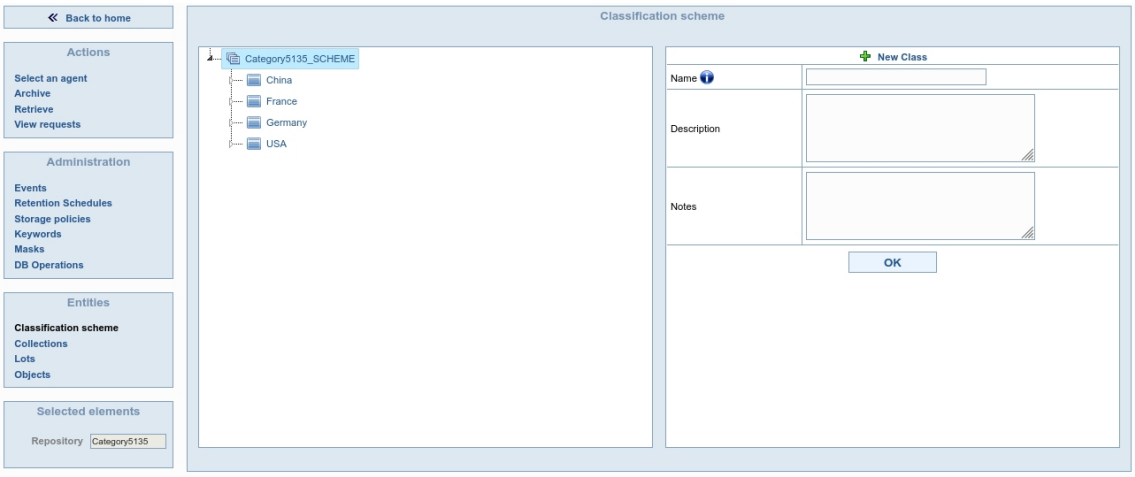


Figure 2.8. Adding a Class

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.

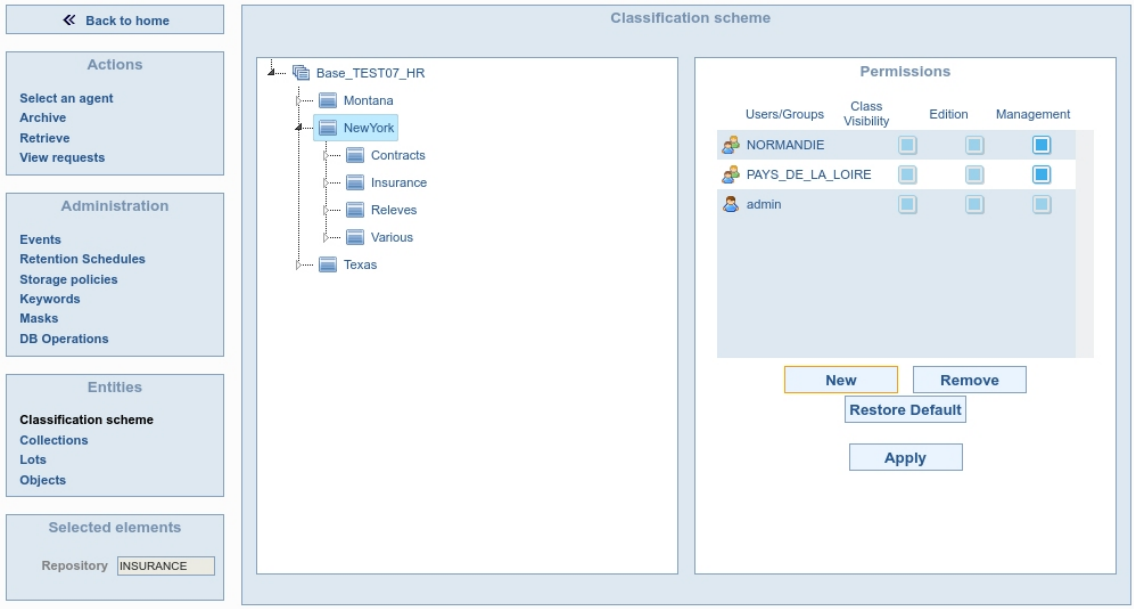


Figure 2.9. Changing a Permission

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.

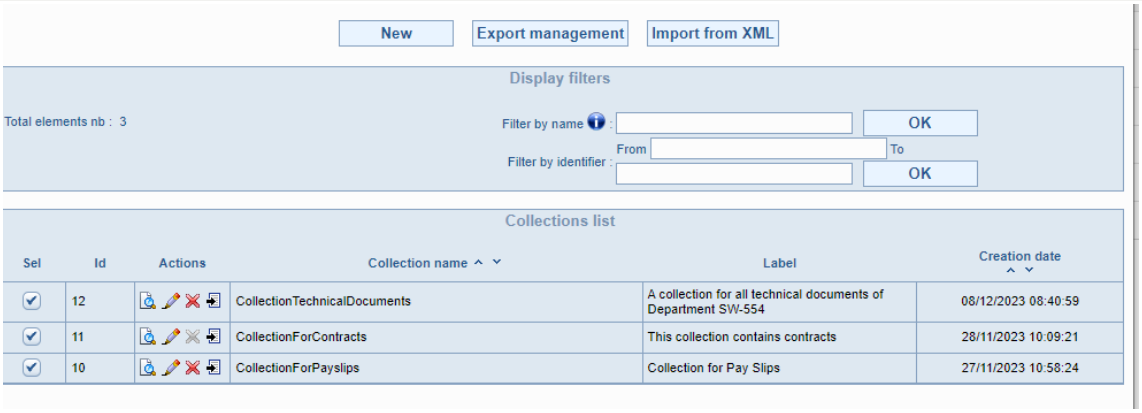


Figure 2.10. Collection List

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.

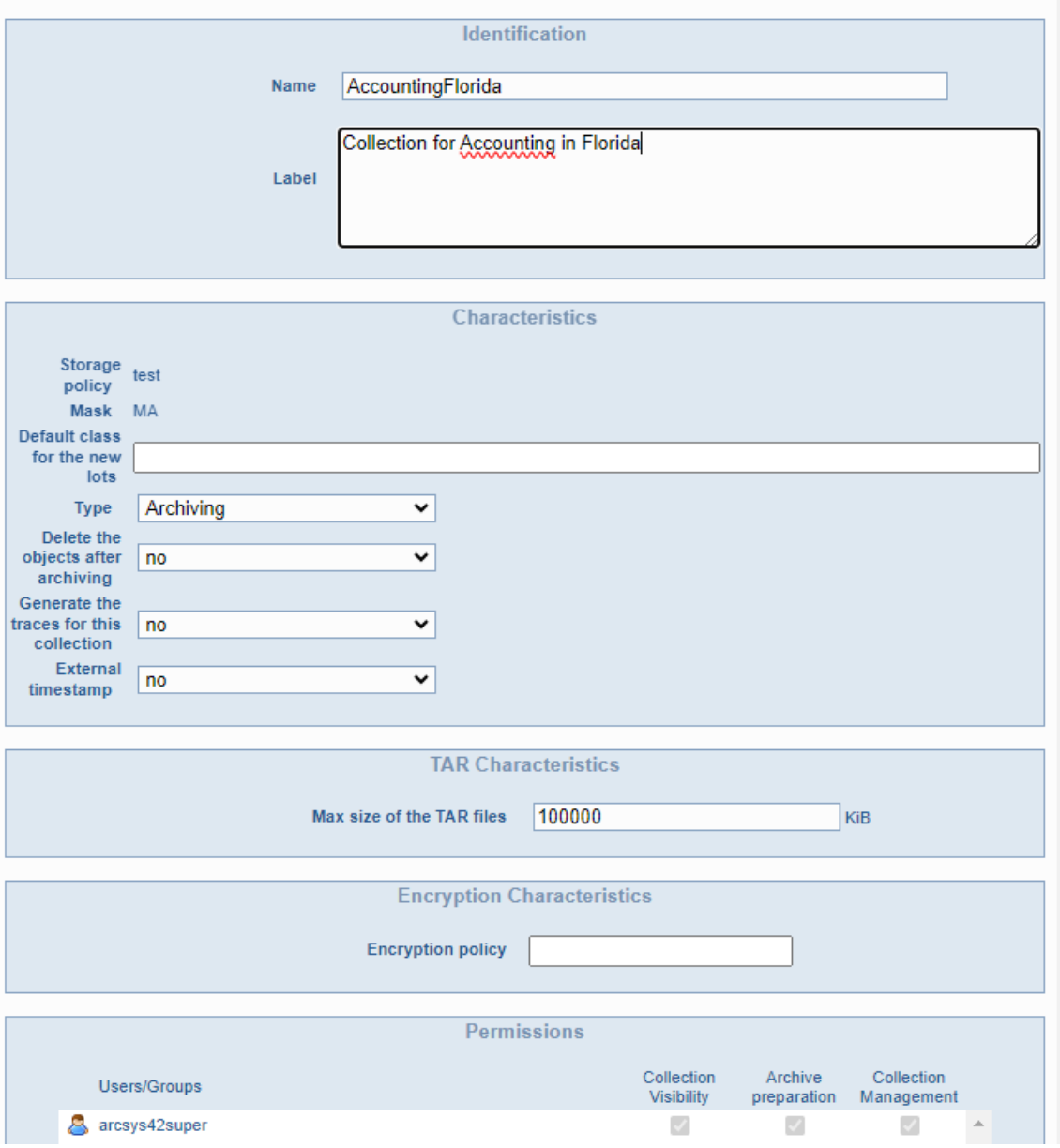


Figure 2.11. Creating a Collection

- **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.

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

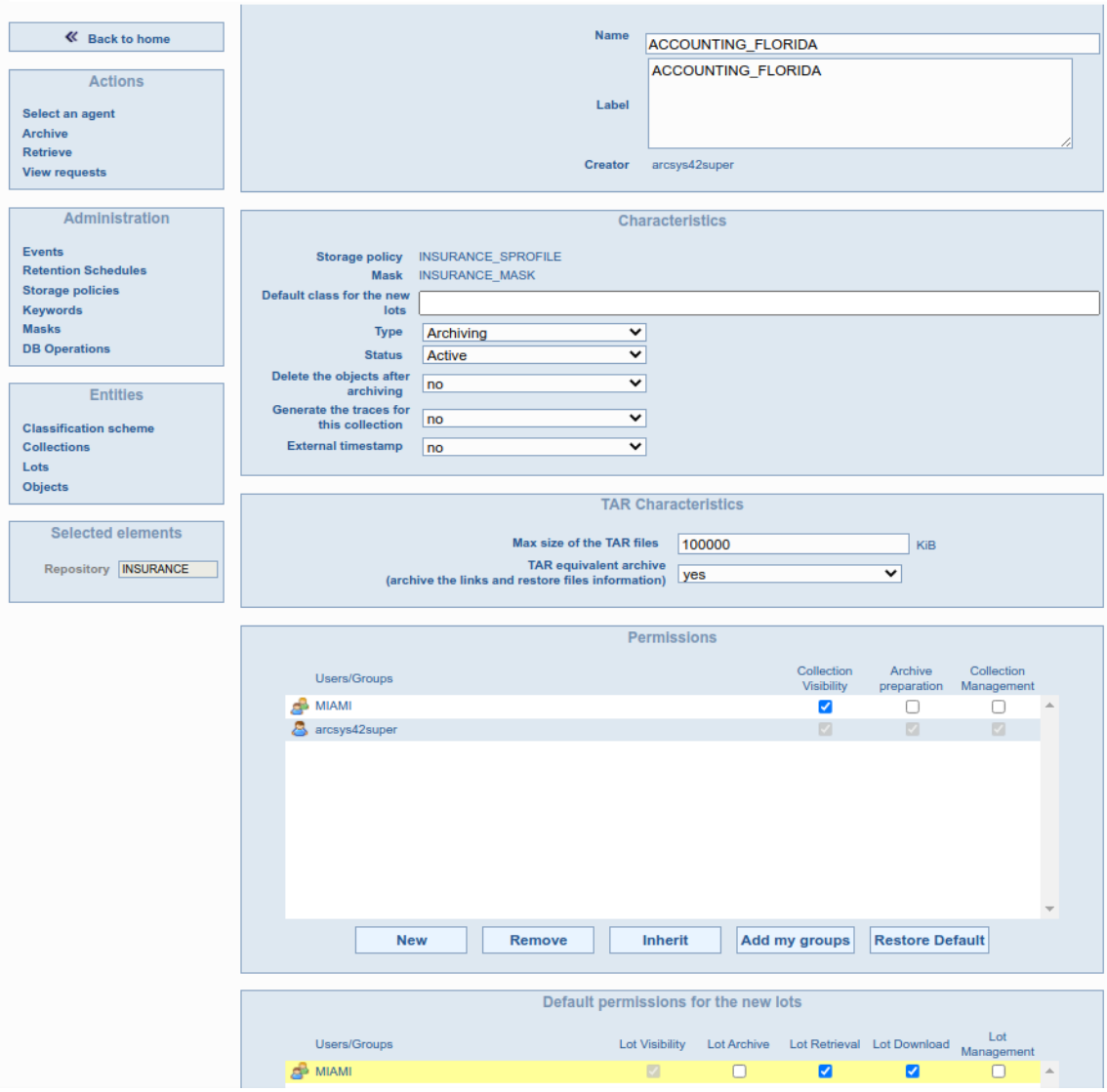


Figure 2.12. Changing the Storage Policy and the Mask of a Collection

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).

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.

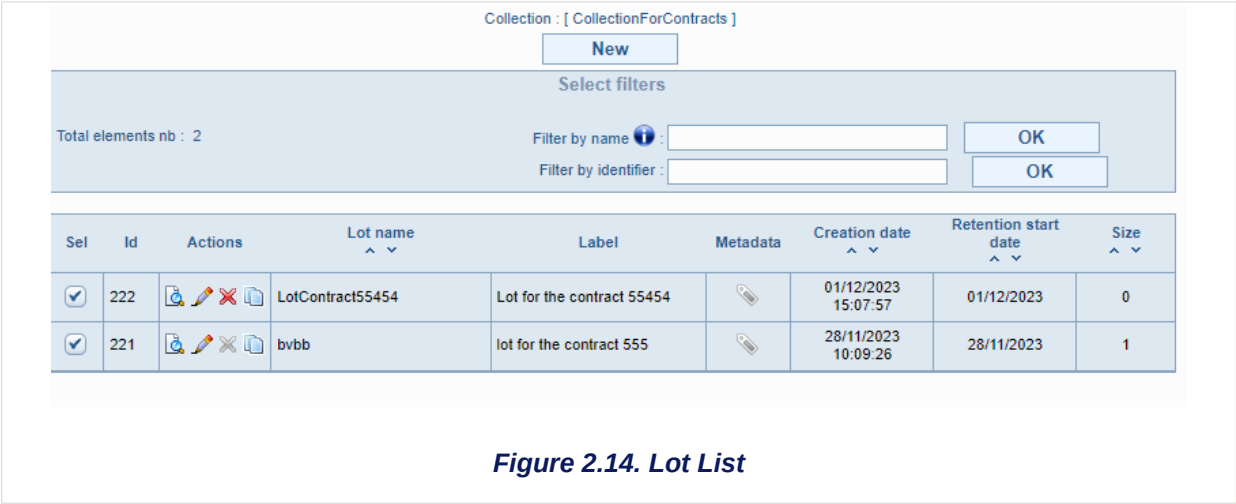


Figure 2.14. Lot List

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]).

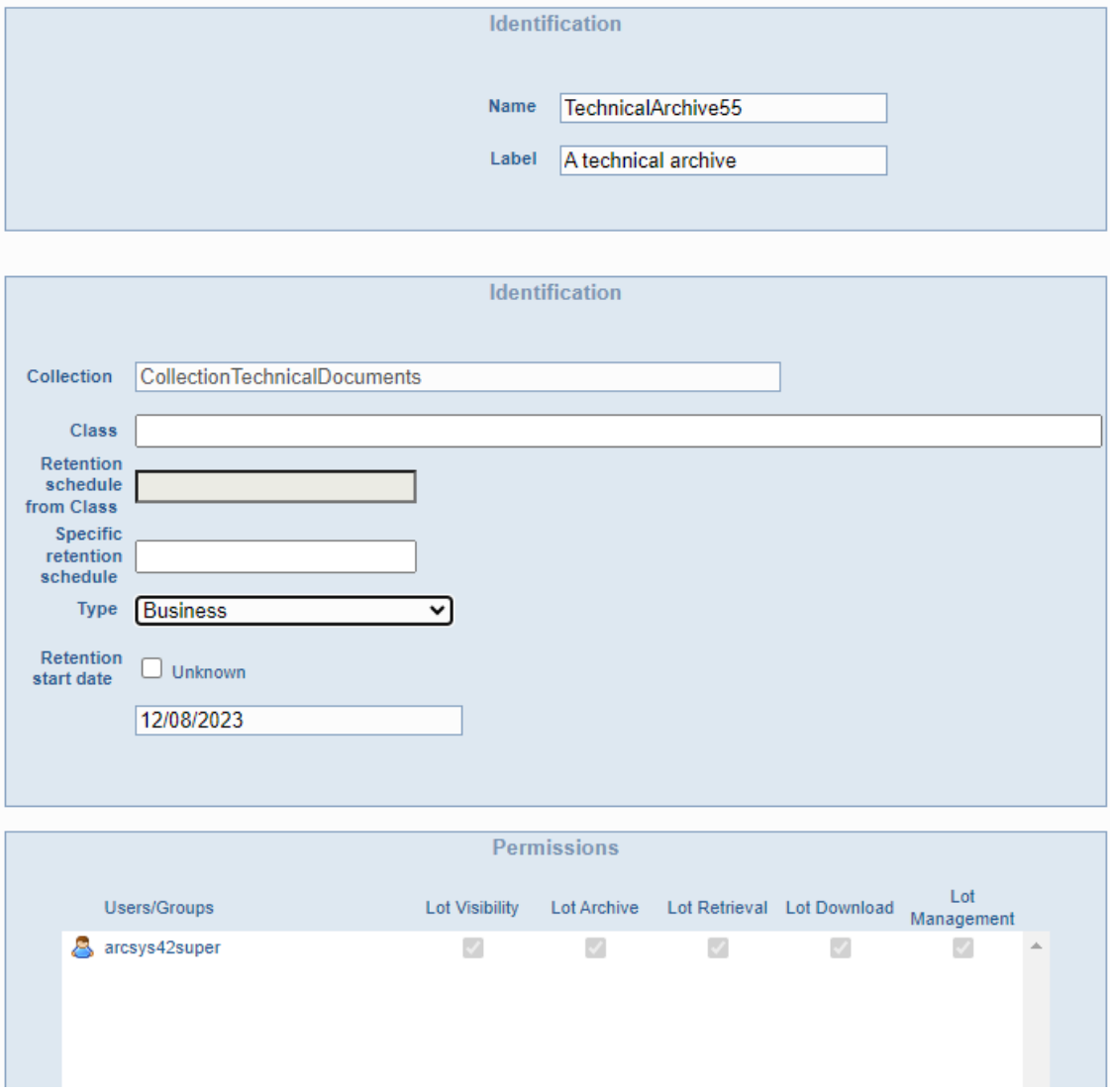


Figure 2.15. Creating a Lot

- **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]).

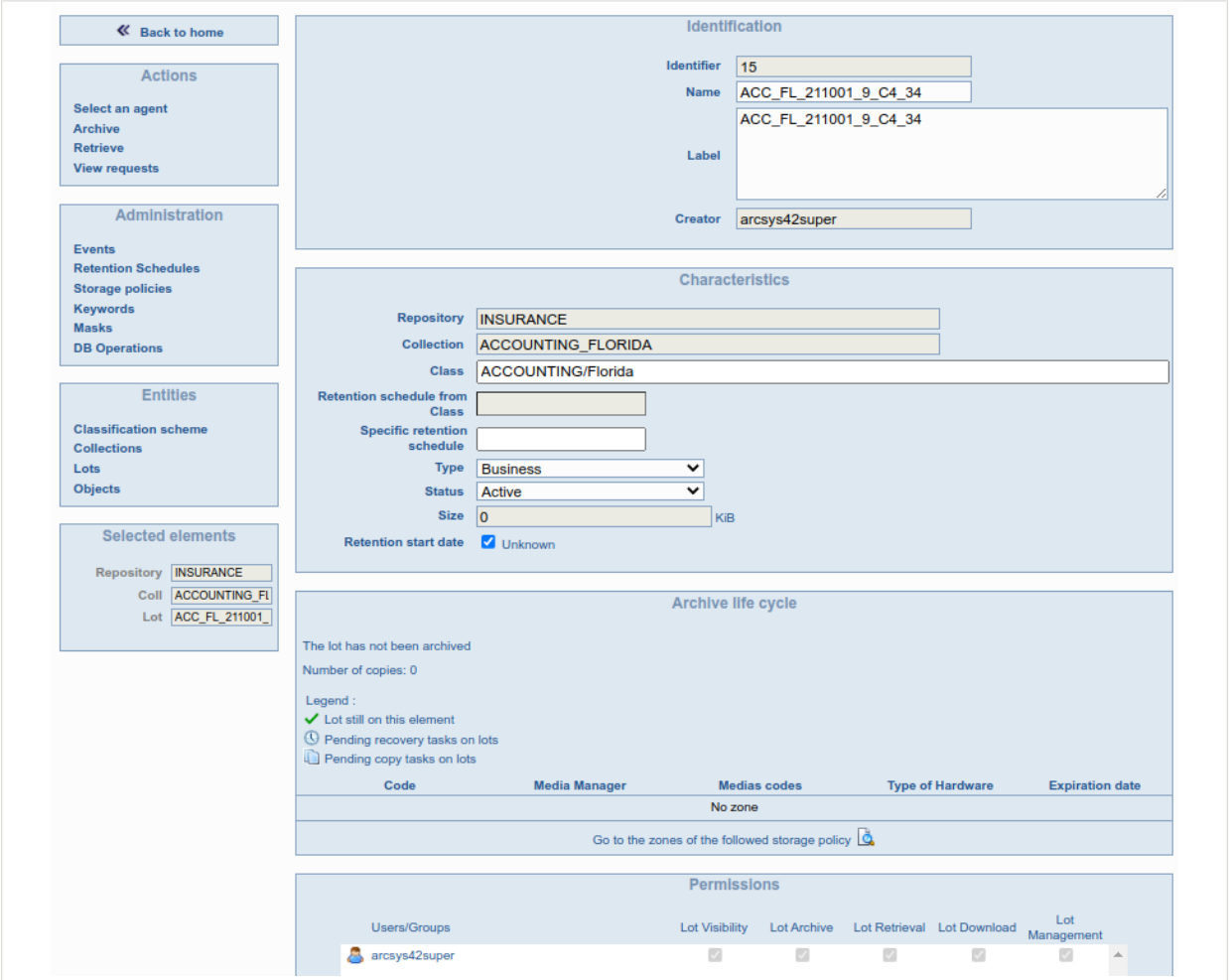


Figure 2.16. Editing a Lot

- **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.

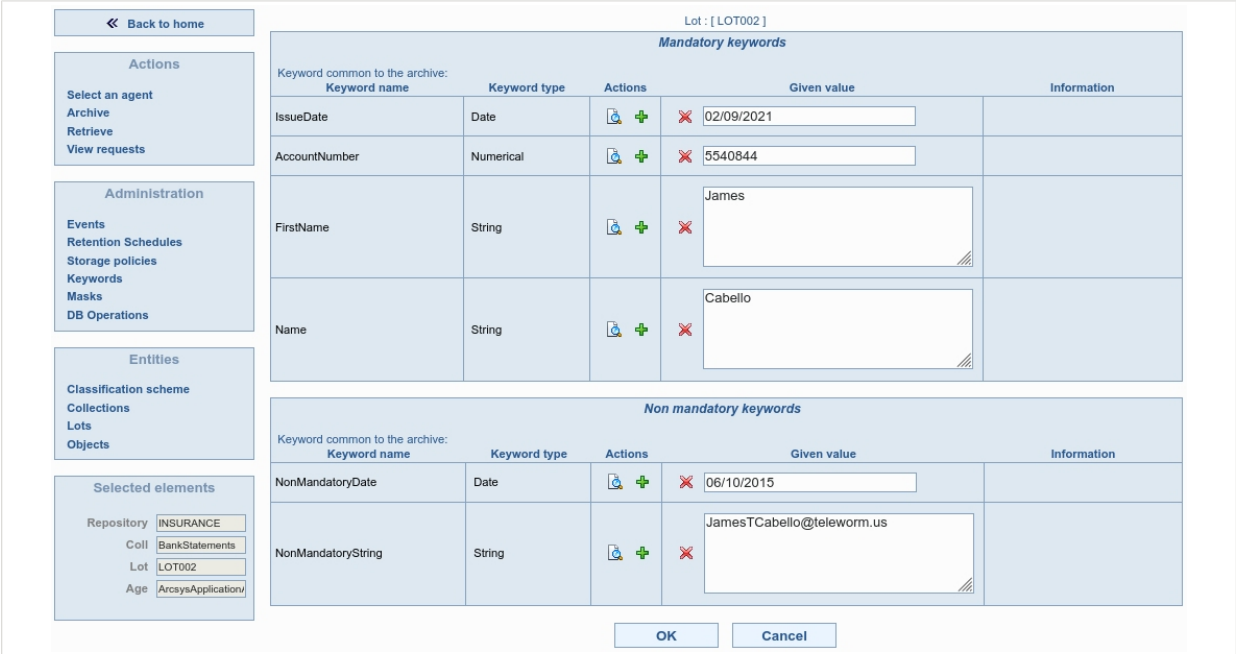


Figure 2.17. List of the Metadata of a Lot

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.

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.

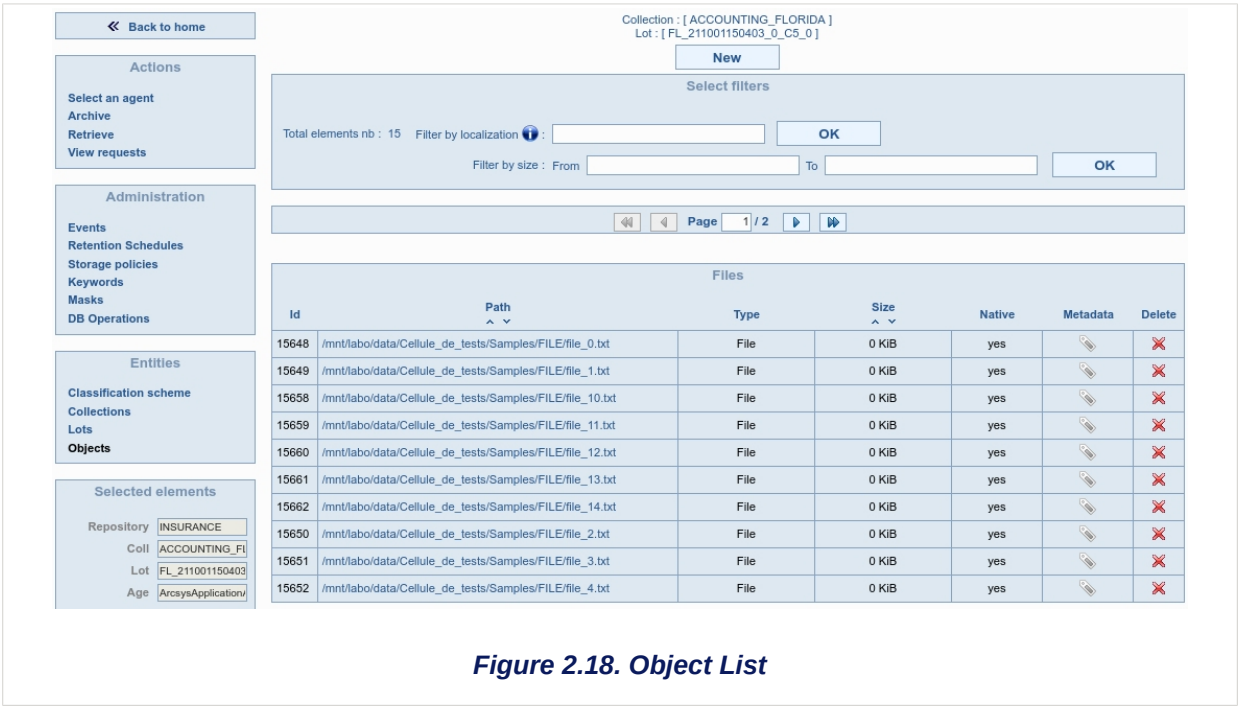


Figure 2.18. Object List

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]).

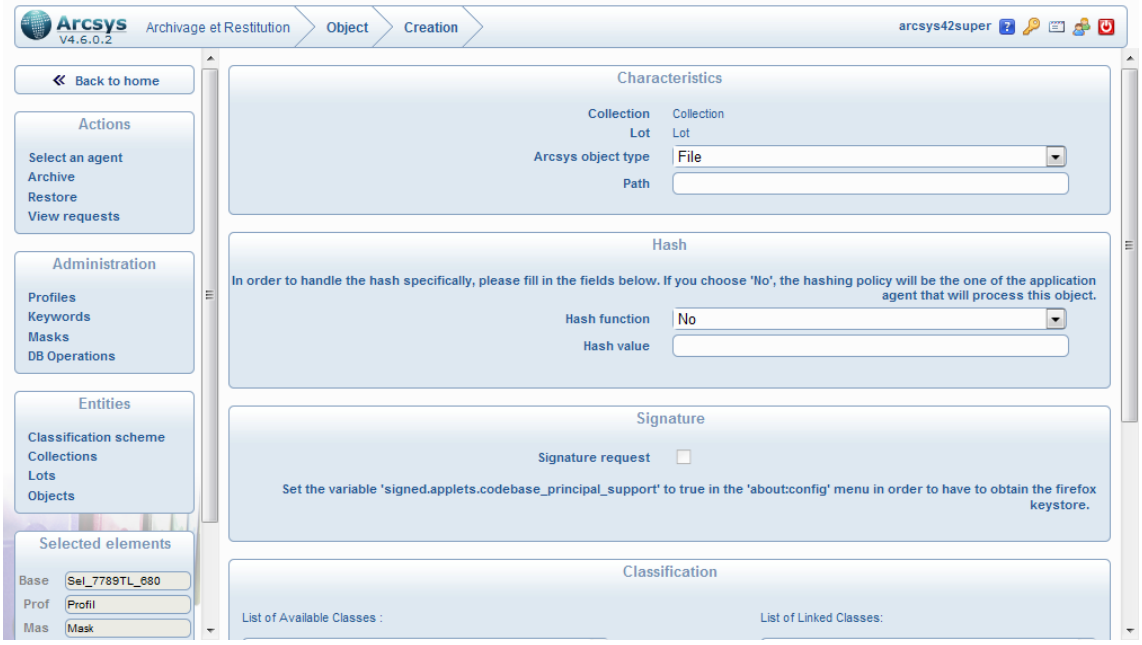


Figure 2.19. Creating an Object

- **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:

Letter	*Definition*	*Example*	
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])

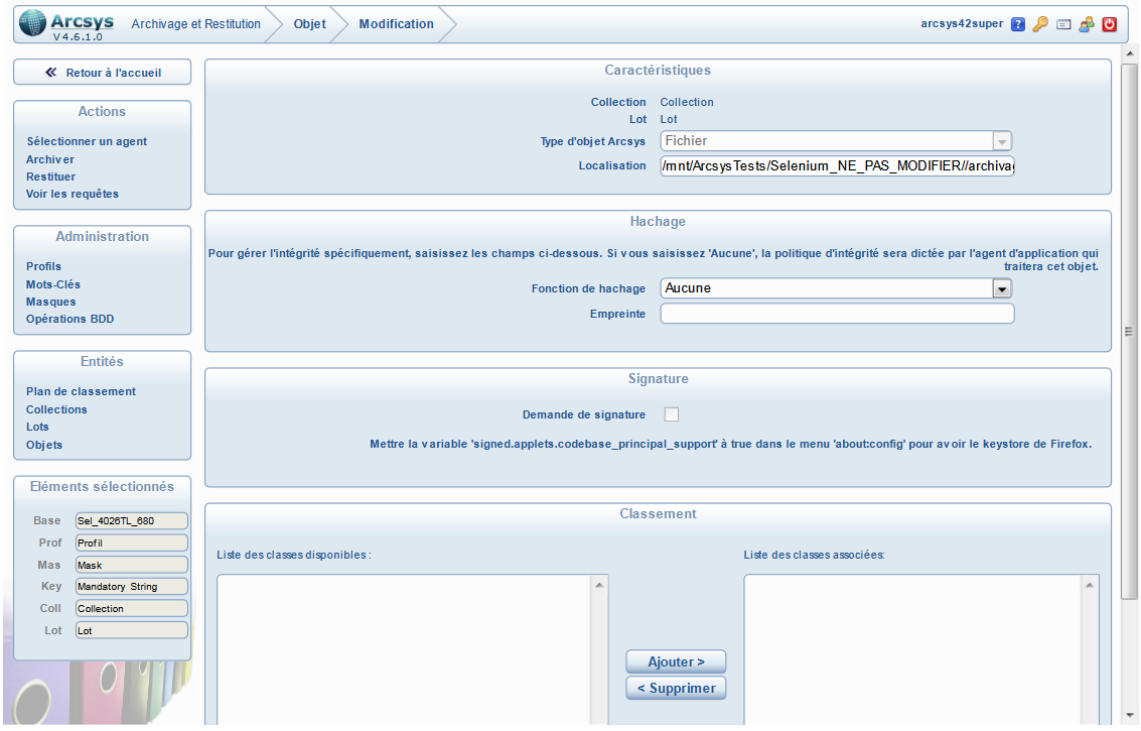


Figure 2.20. Editing an Object

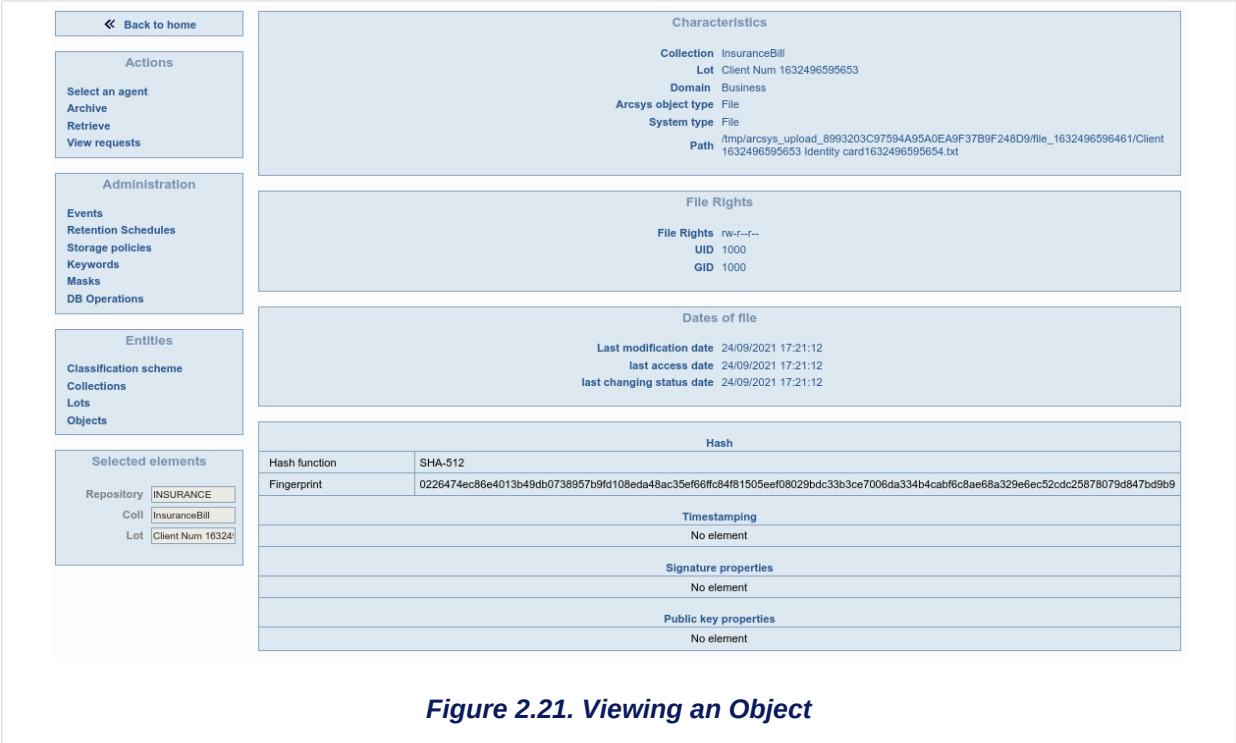


Figure 2.21. Viewing an Object

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.).

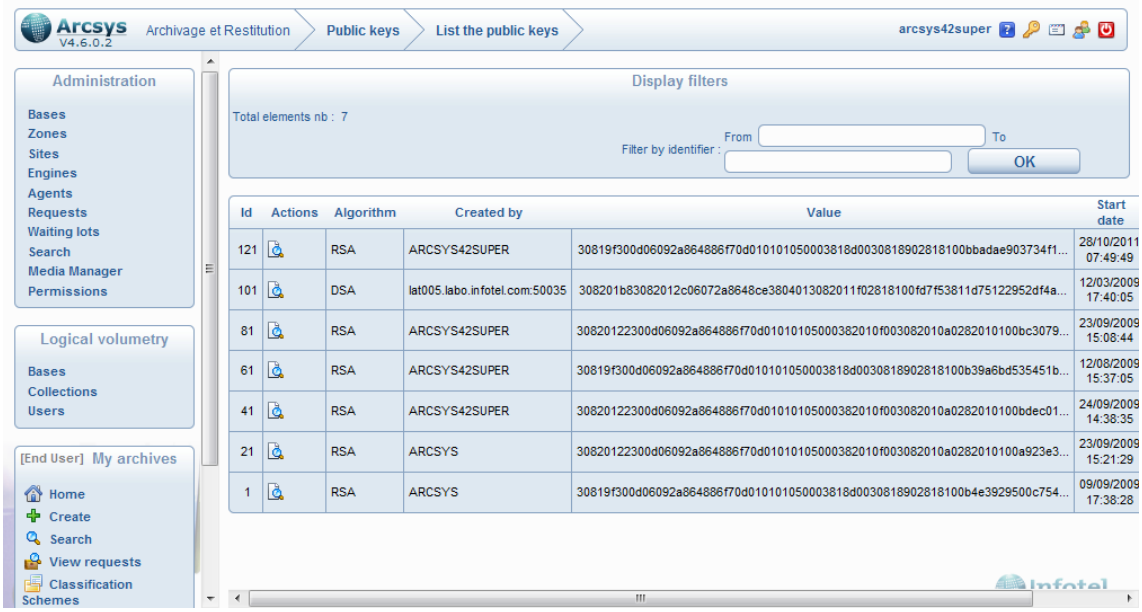


Figure 2.22. List of Public Keys

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.

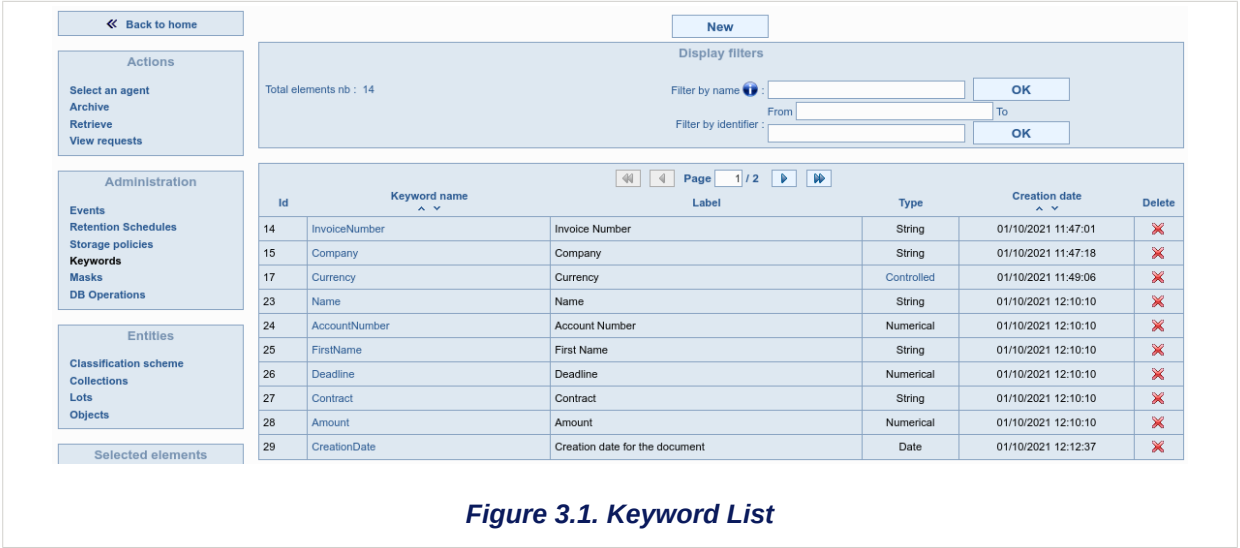


Figure 3.1. Keyword List

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]).

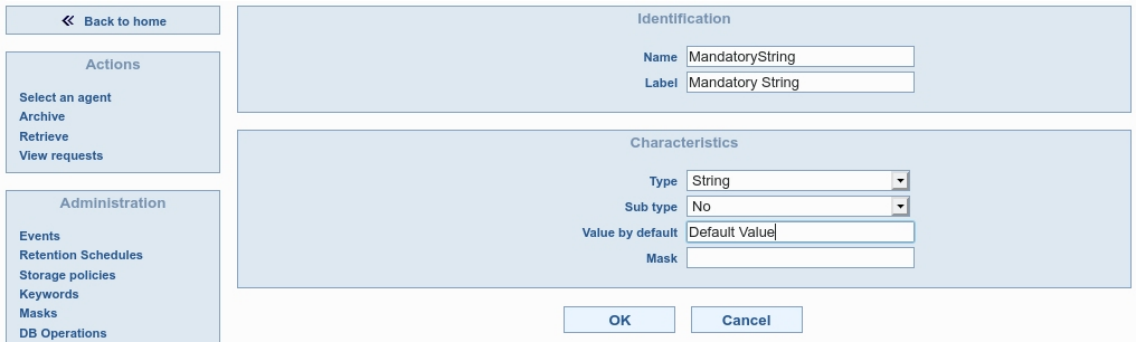


Figure 3.2. Creating a Keyword

- **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:

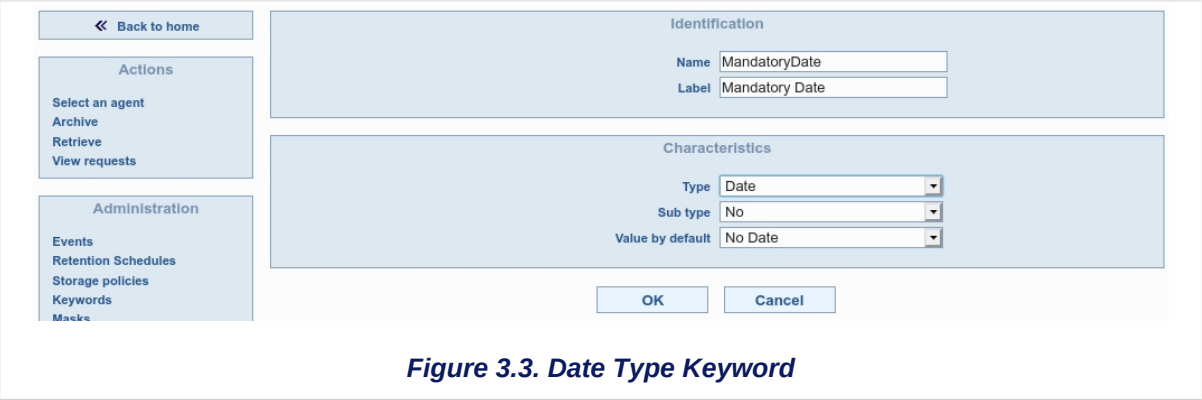


Figure 3.3. Date Type Keyword

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

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.

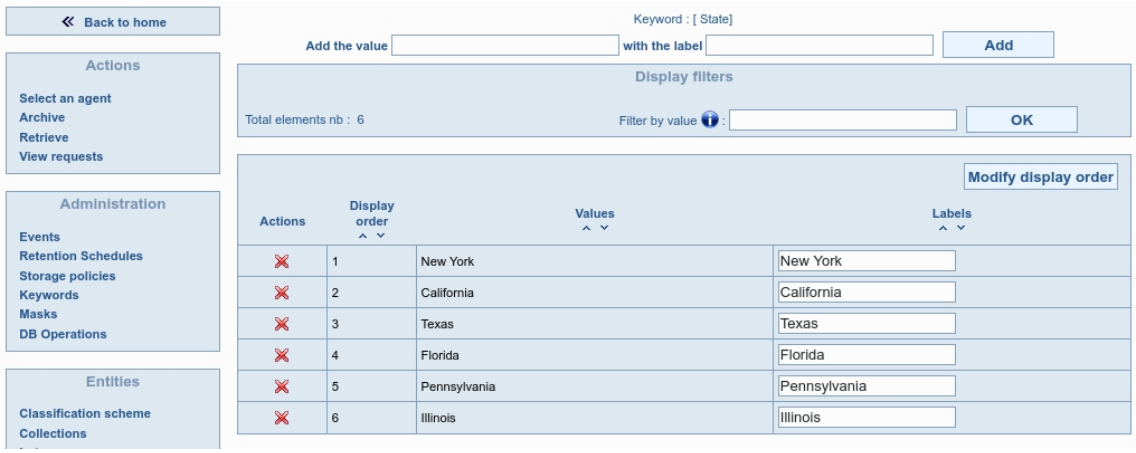


Figure 3.4. List of Controlled Values for a Keyword

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.

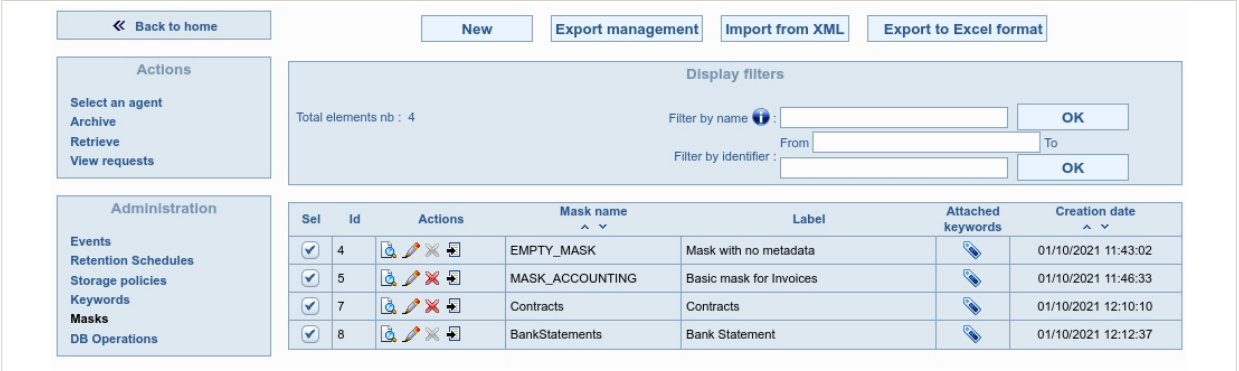


Figure 3.5. Mask List

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]).

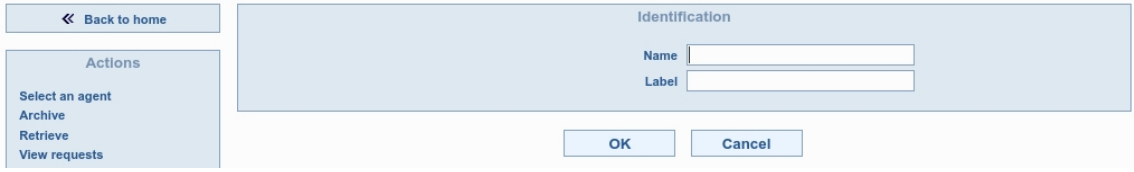


Figure 3.6. Creating a Mask

- **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).

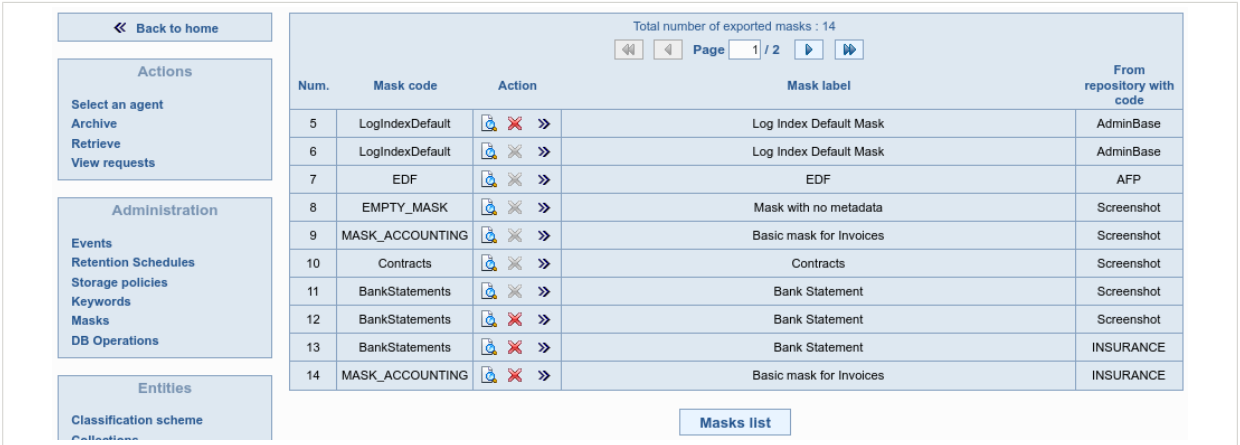


Figure 3.7. Managing Mask Exports

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.

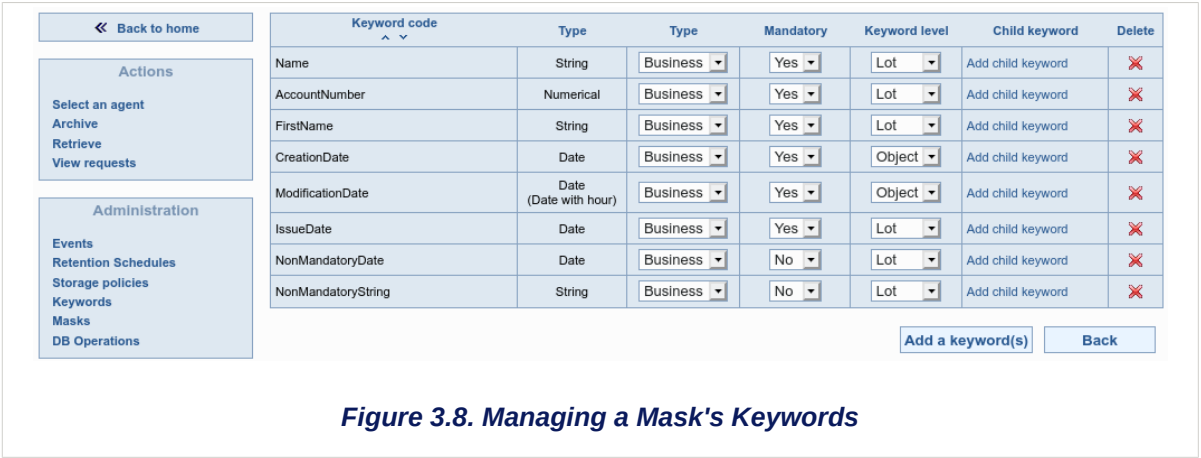


Figure 3.8. Managing a Mask's Keywords

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.

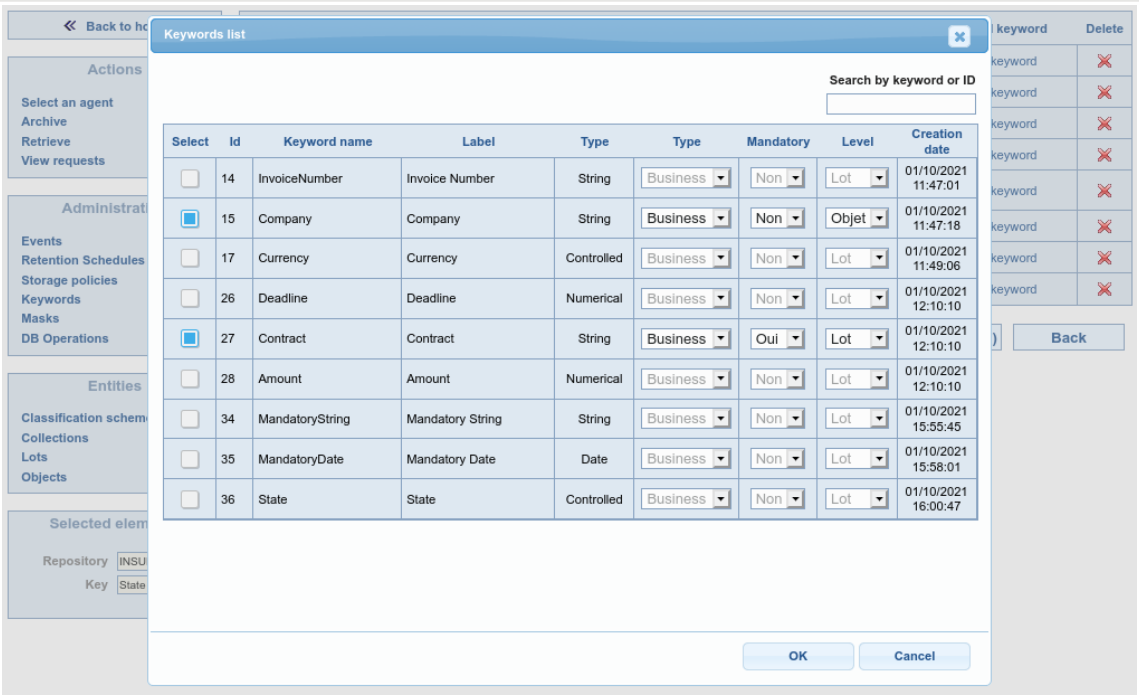


Figure 3.9. Adding a Keyword to a Mask

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]).

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)

- 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.

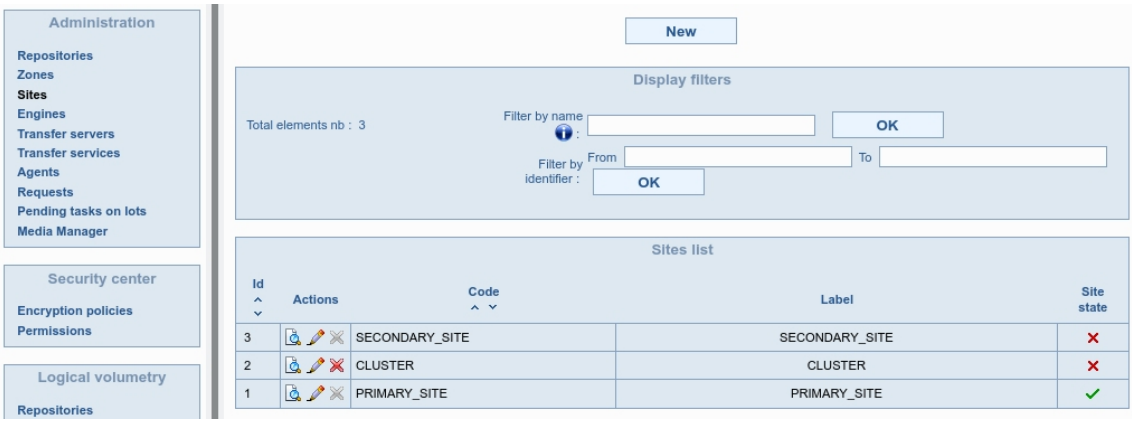


Figure 5.1. Site List

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.

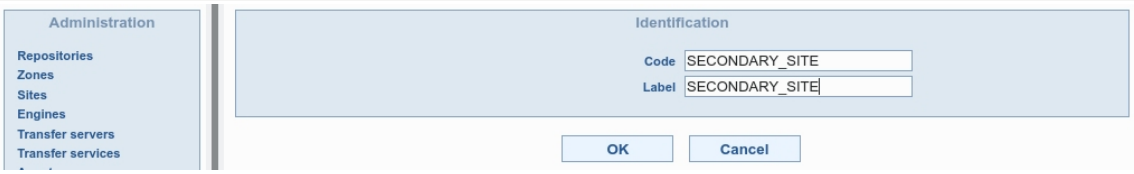


Figure 5.2. Creating a Site

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.

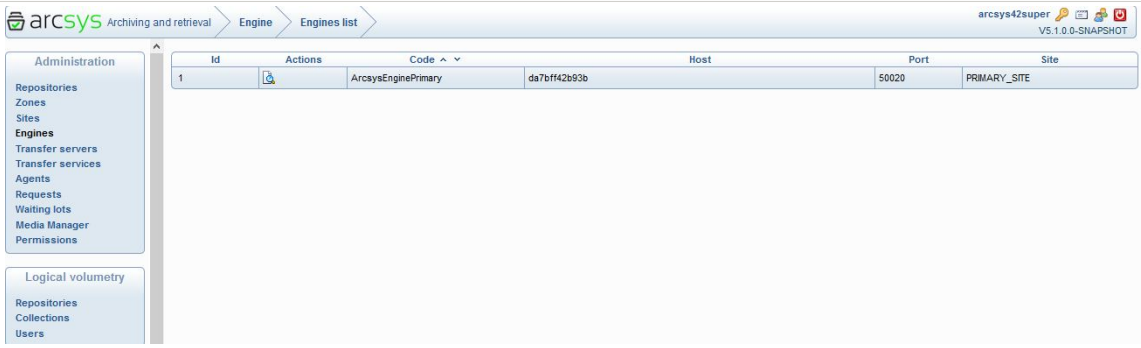


Figure 5.3. Engine List

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.

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**.

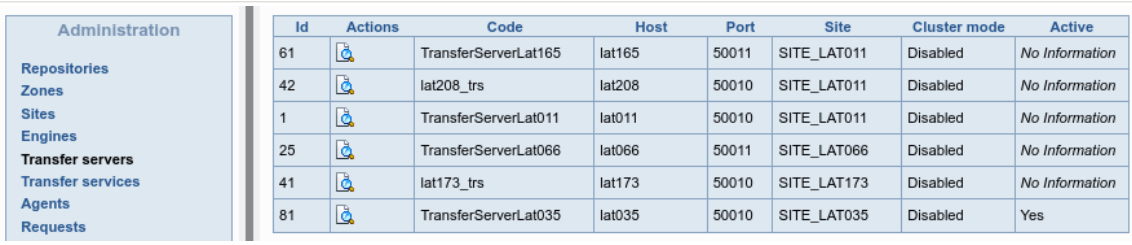
This menu entry is available in the **Administration menu** and can be accessed without selecting a repository.

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.

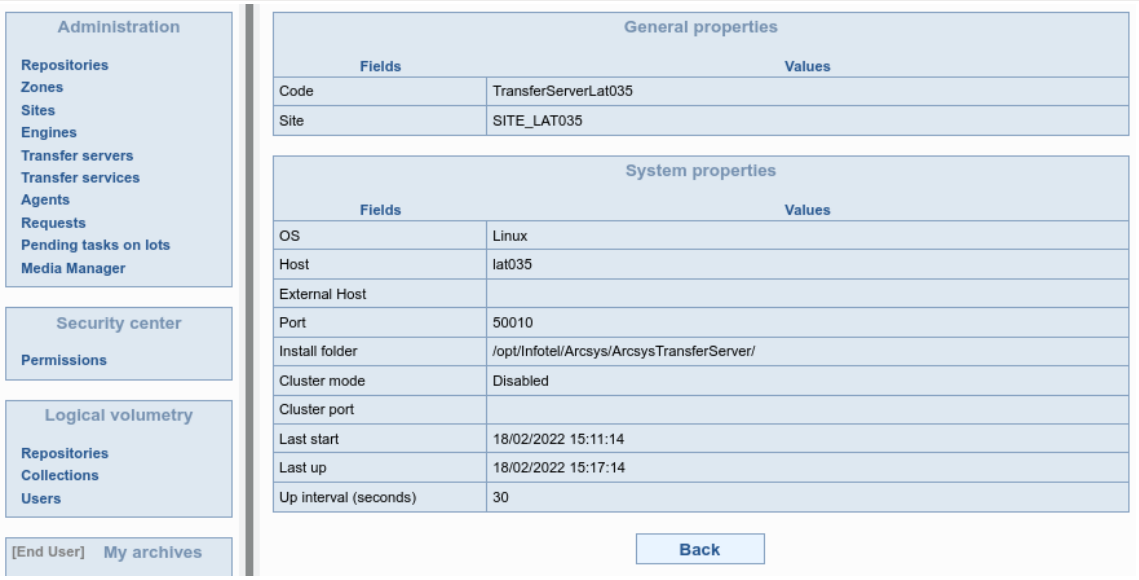


Figure 6.2. Querying a Arcsys Transfer Server

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.

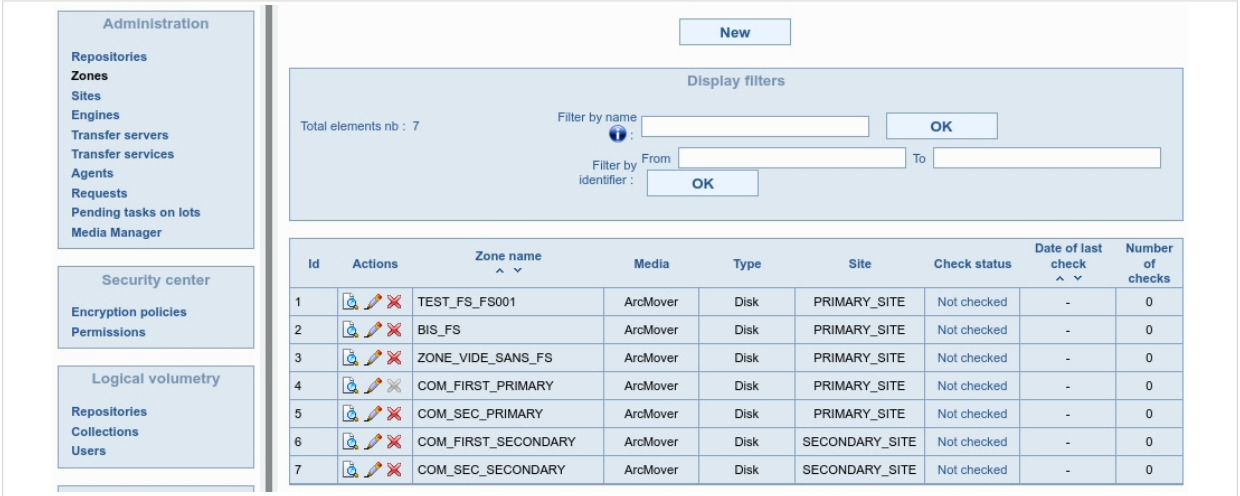


Figure 8.1. Zone List

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]).

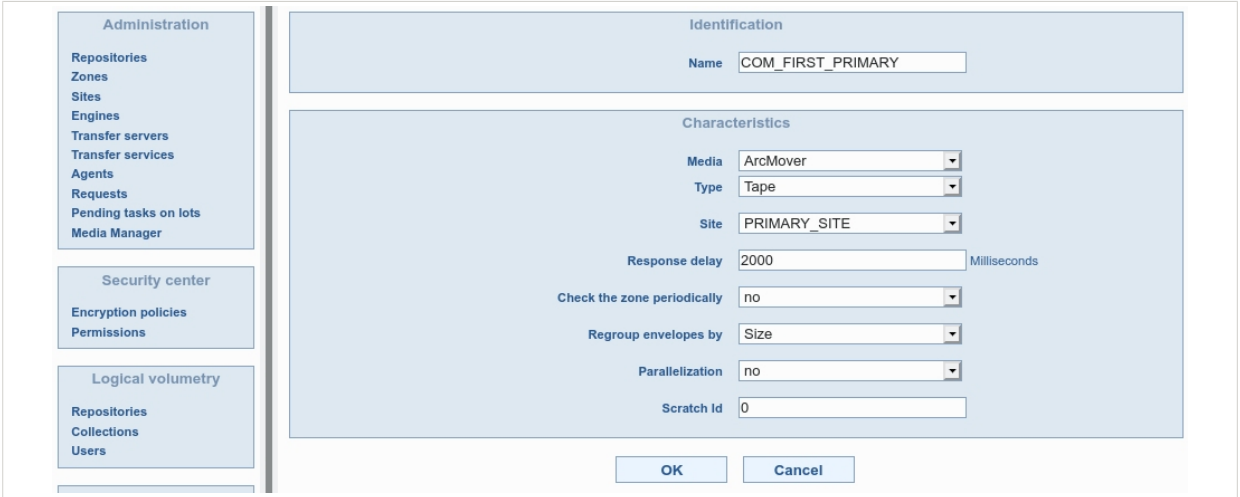


Figure 8.2. Creating a Zone

- **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.

- **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 envelops 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.

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/arcmover/<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.

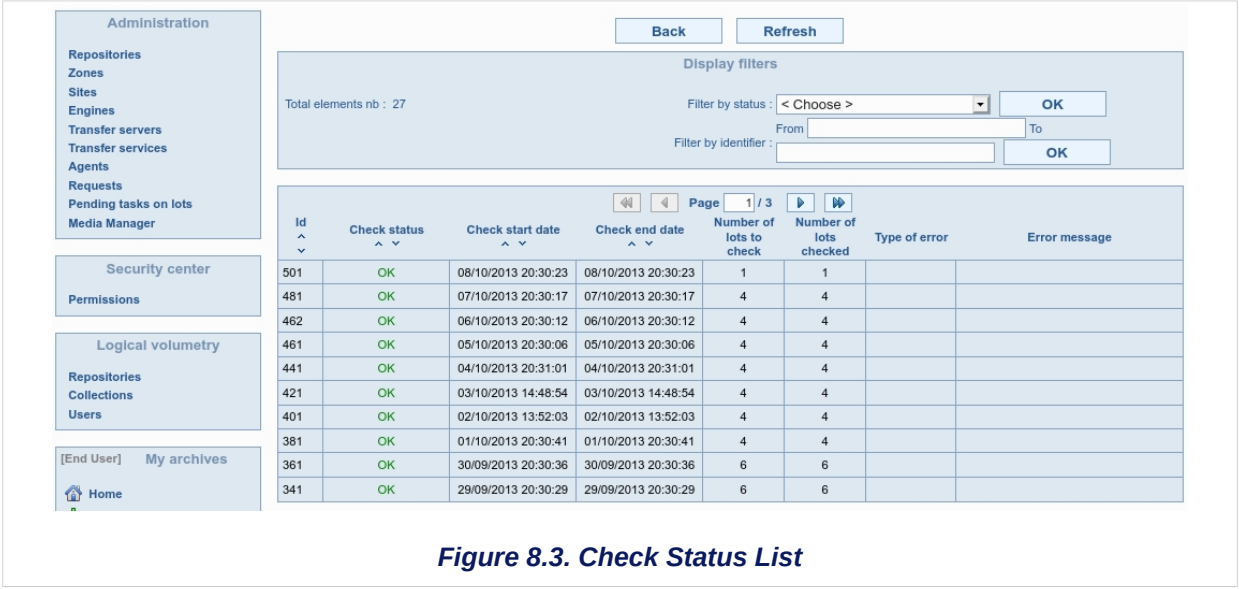


Figure 8.3. Check Status List

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.

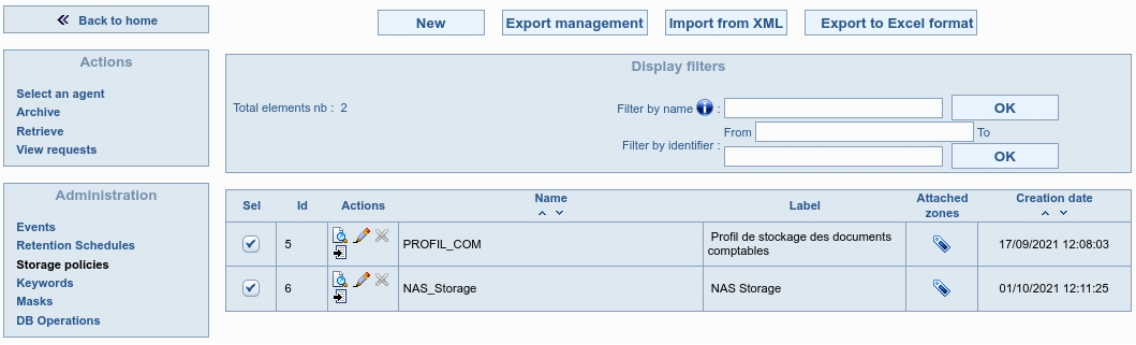


Figure 8.4. Storage Policies Lists

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]).

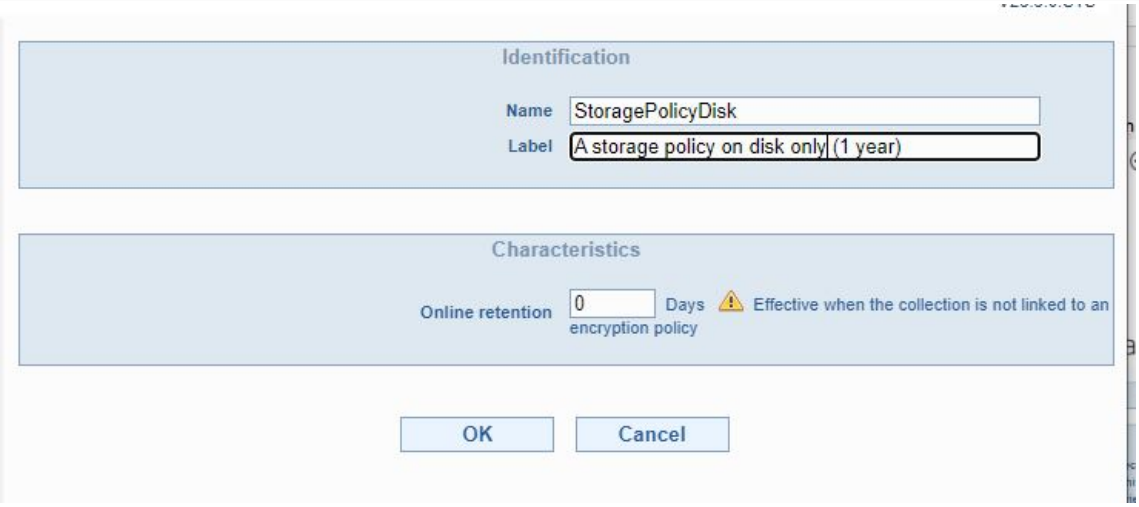


Figure 8.5. Creating a Storage Policy

- **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).

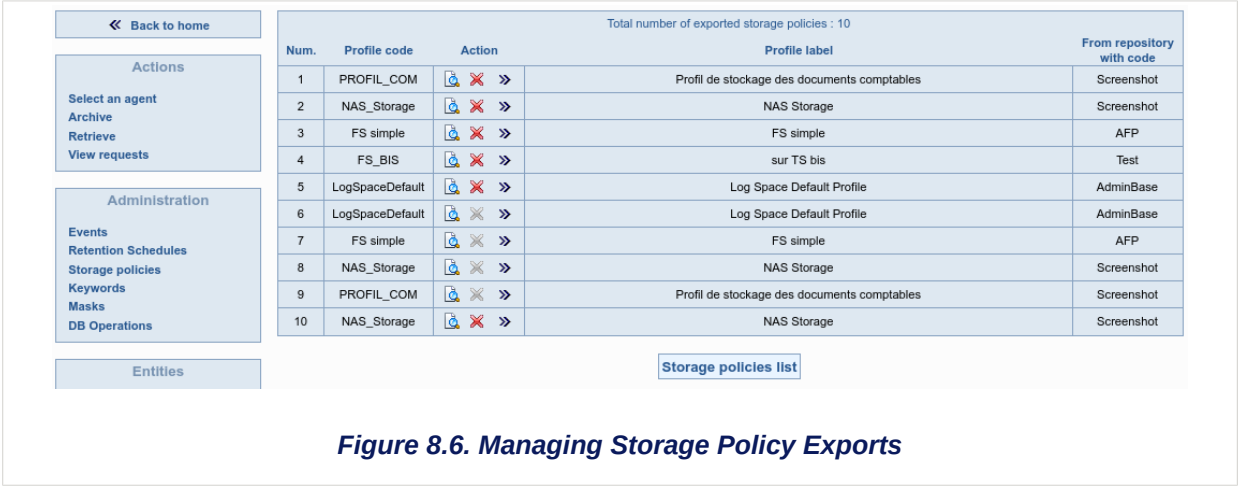


Figure 8.6. Managing Storage Policy Exports

8.3.7. Import

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

8.3.8. Managing Associated Pools

storage policys 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.

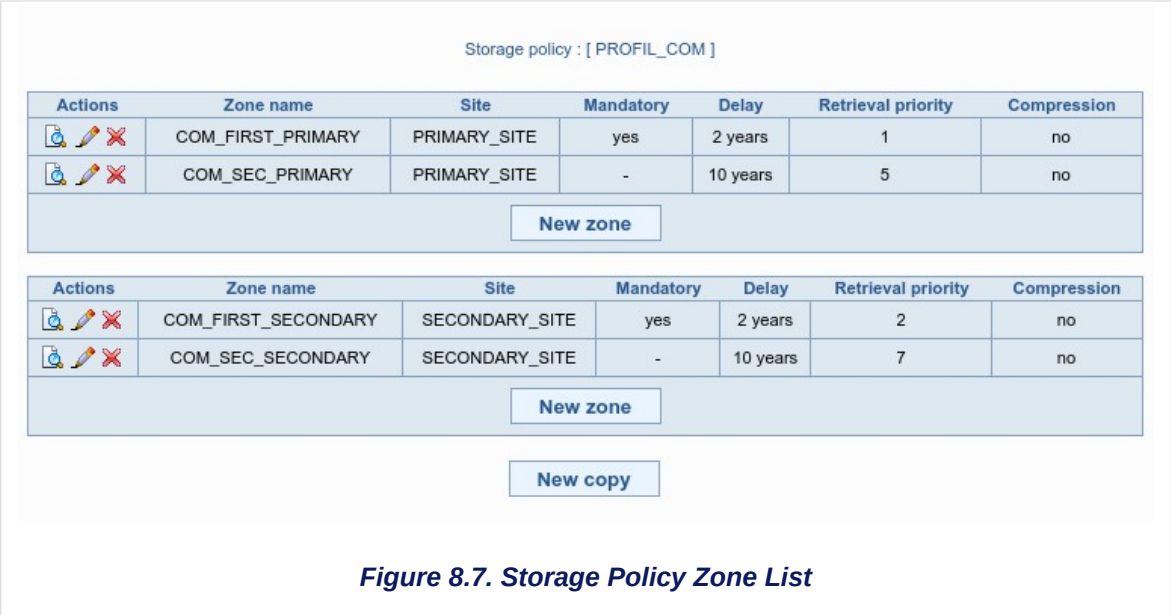


Figure 8.7. Storage Policy Zone List

3. 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.

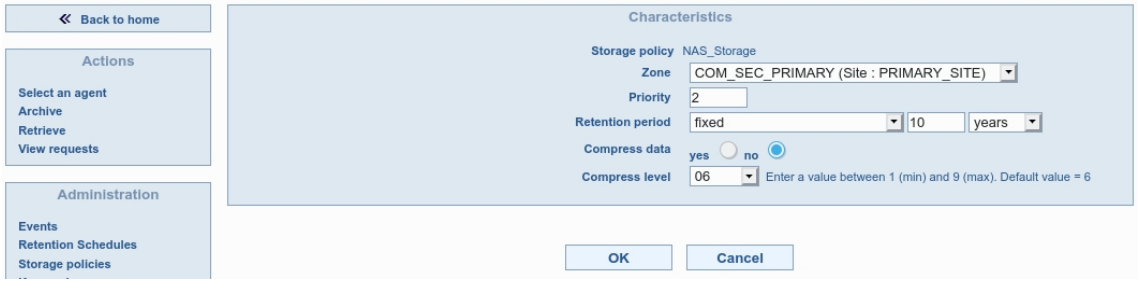


Figure 8.8. Adding a Zone to a Storage Policy

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.

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.

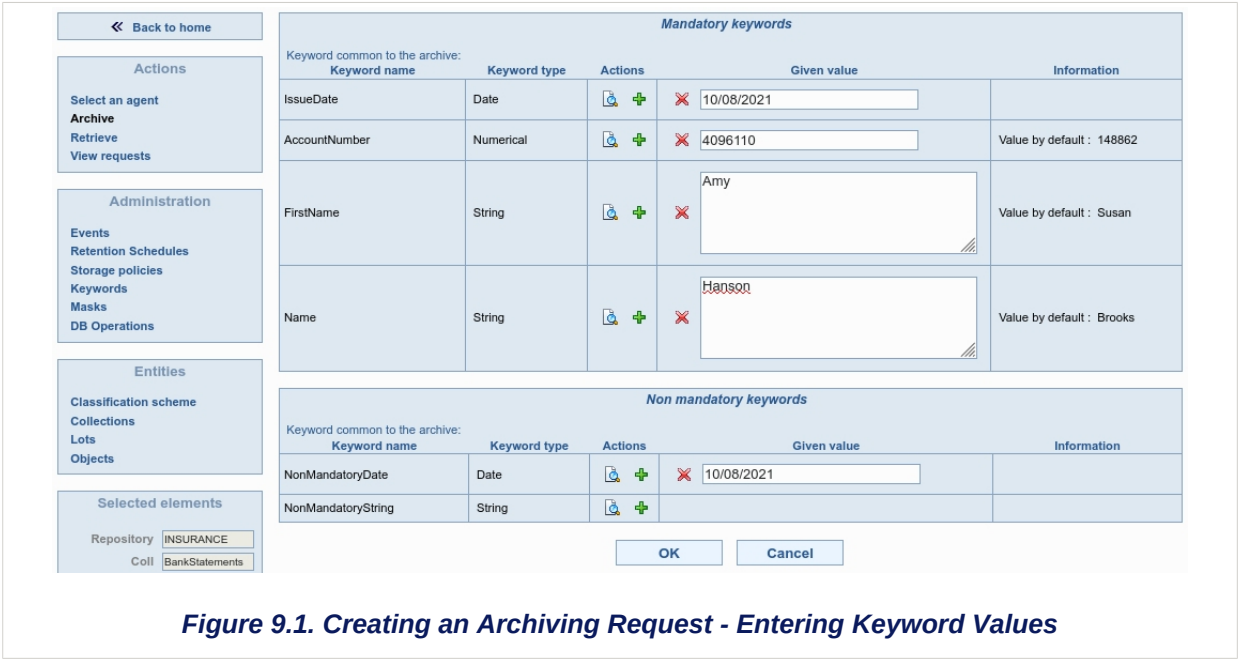


Figure 9.1. Creating an Archiving Request - Entering Keyword Values

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.

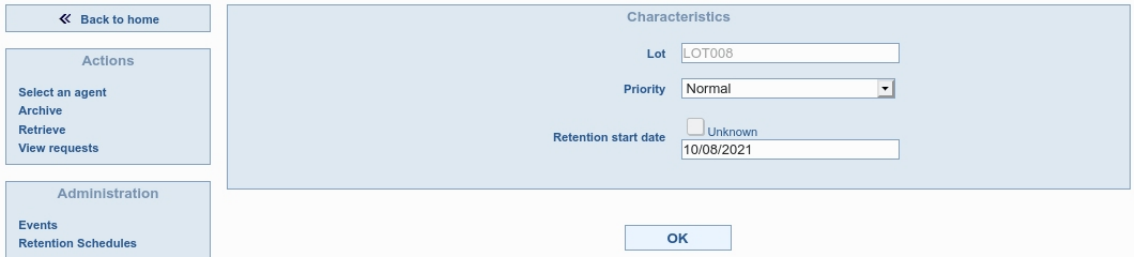


Figure 9.2. Creating an Archiving Request - Choosing the Priority

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.

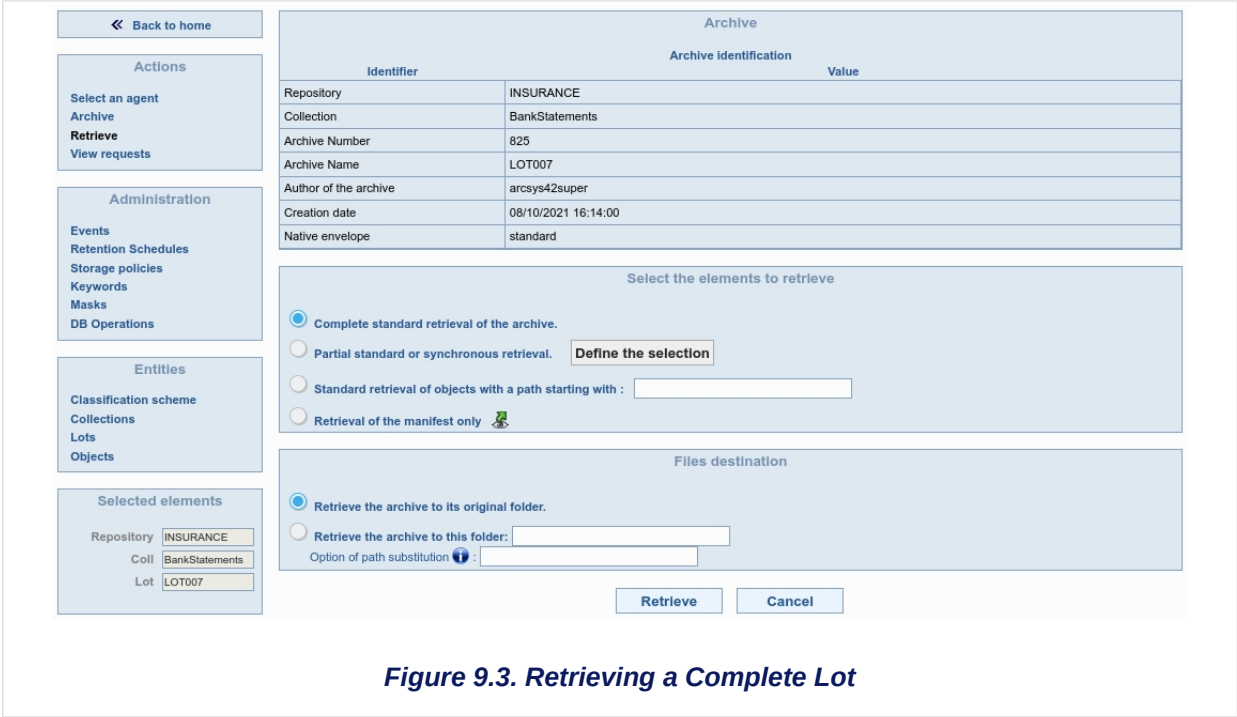


Figure 9.3. Retrieving a Complete Lot

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

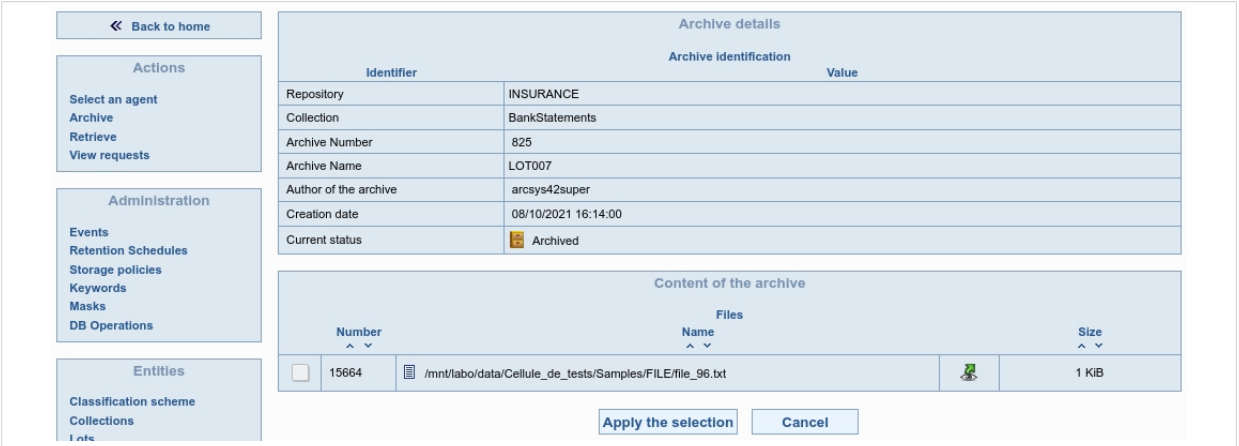


Figure 9.4. Partial Retrieval of a Lot

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 Serveris 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:

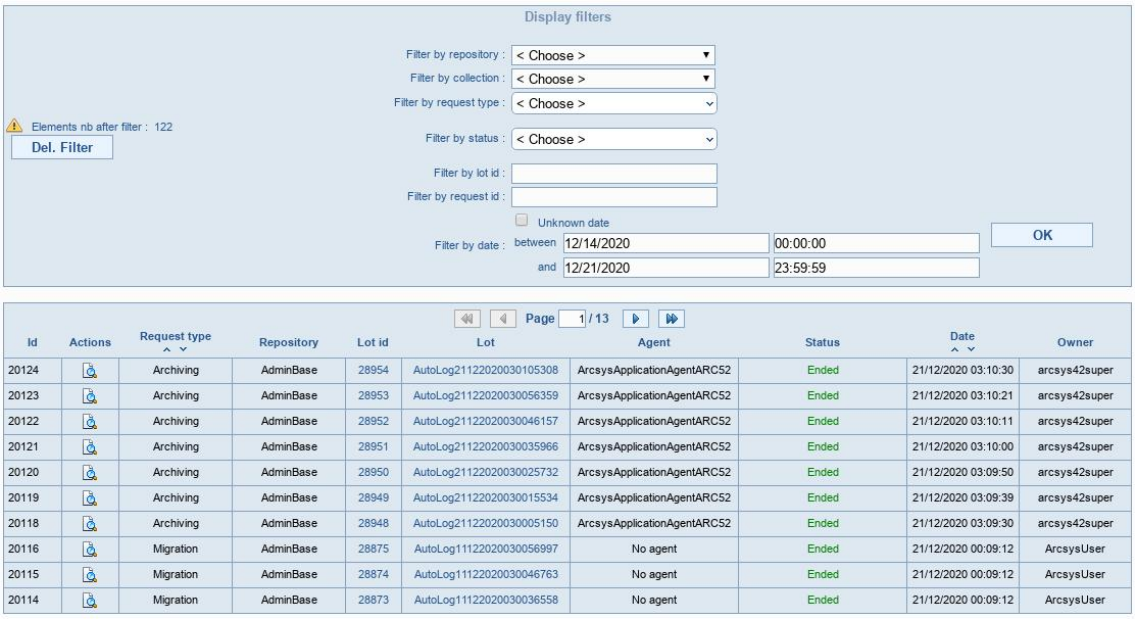
- **Requests** via the Administration menu (without a selected repository; in this case, you can display the requests of all the repositories).
- **See requests** from the **Actions** menu (accessible only if a repository is selected; in this case, only requests from the repository selected appear).

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**")



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.

Figure 9.6. Details of a Retrieval Request

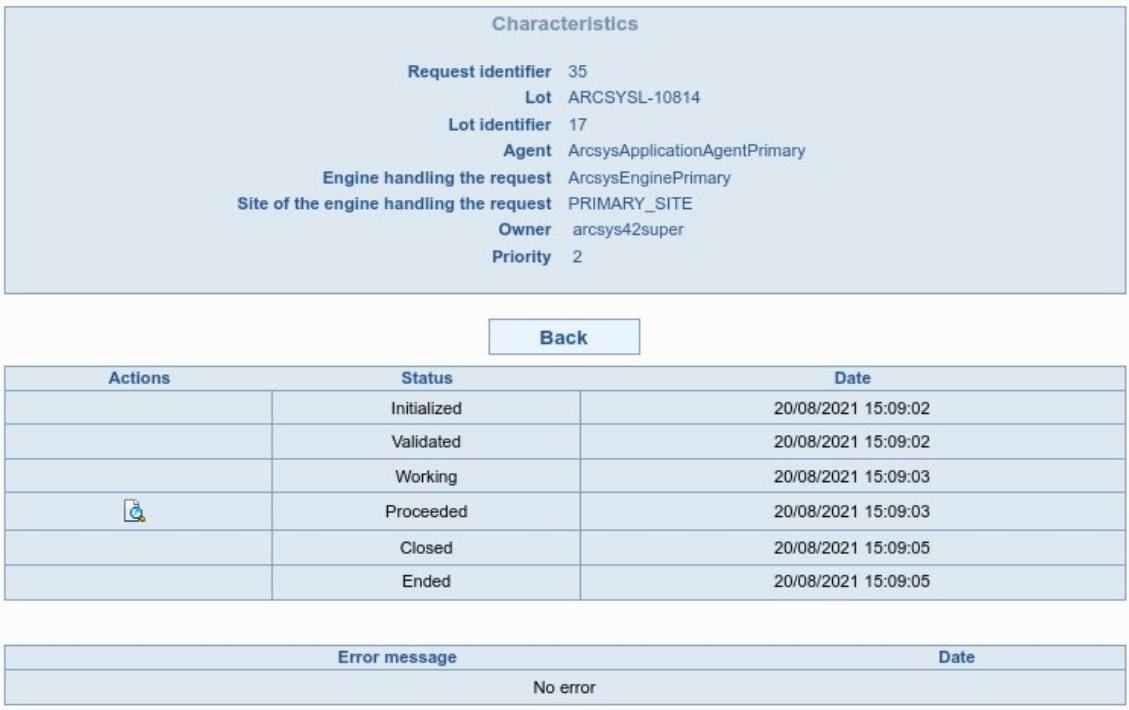


Figure 9.7. Details of an Archiving or Synchronization Request

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.

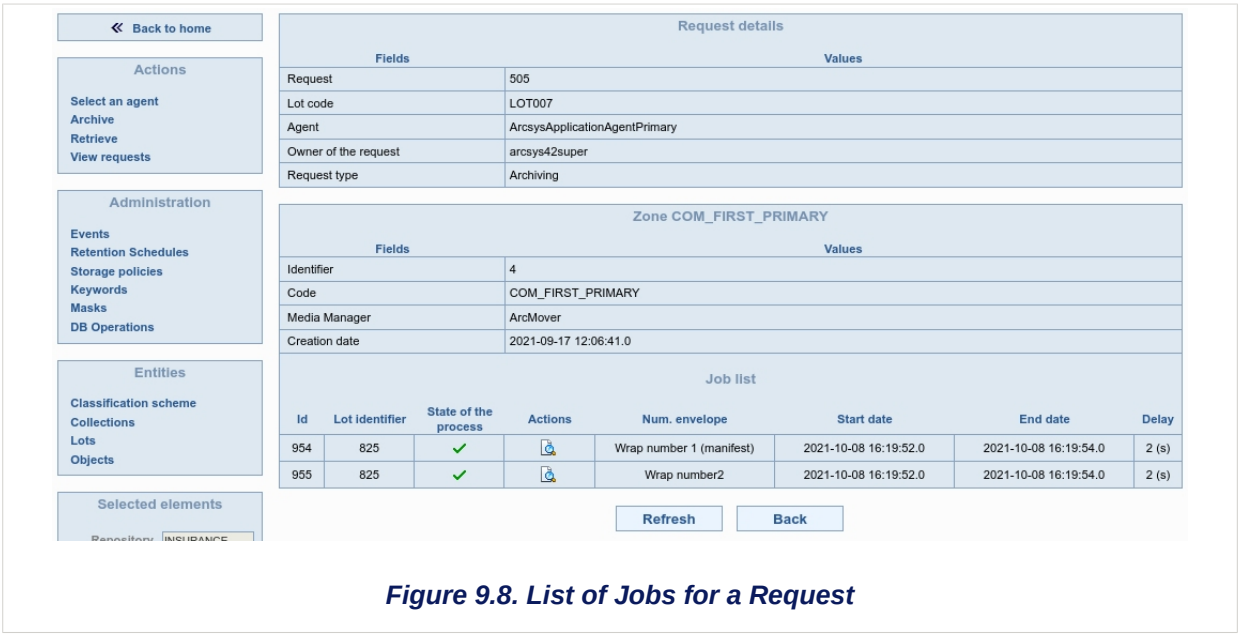


Figure 9.8. List of Jobs for a Request

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.

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.

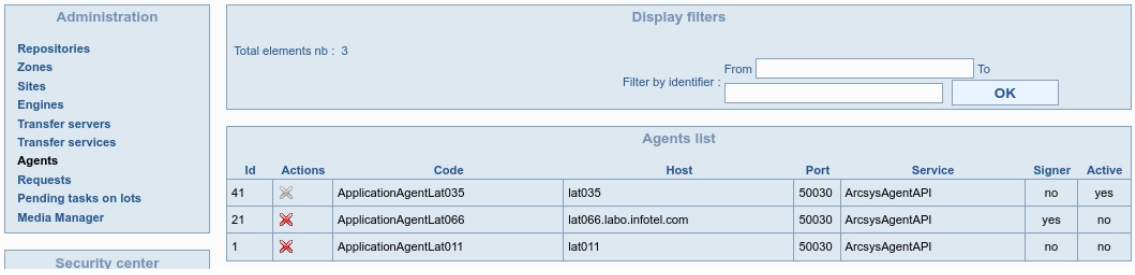


Figure 9.10. Agent List

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).

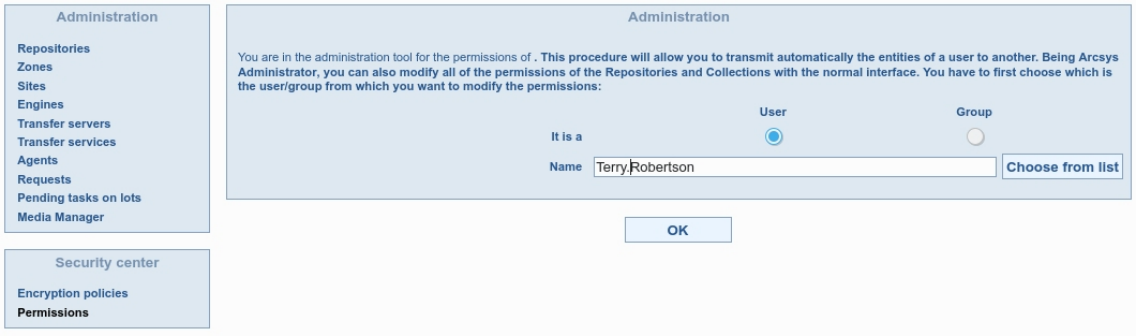


Figure 10.1. Selecting the User to Whom the Entities will be Transferred

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).

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.

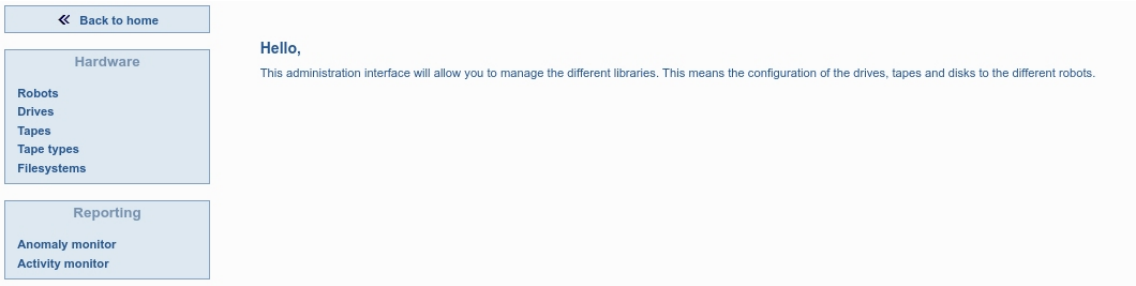


Figure 11.1. Media Manager Administration Menu

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

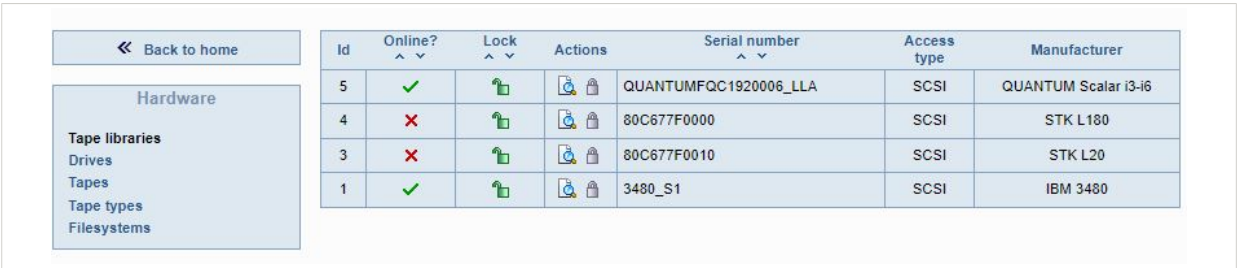


Figure 12.1. Tape library List

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

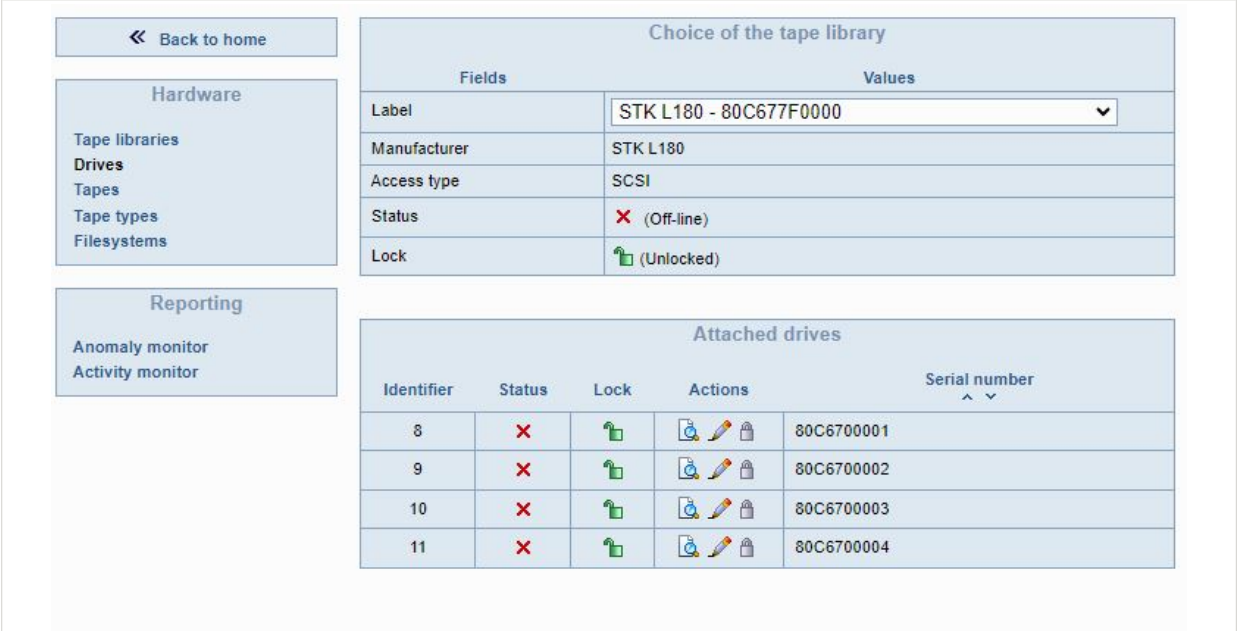


Figure 12.3. List of Drives by Tape Library

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.

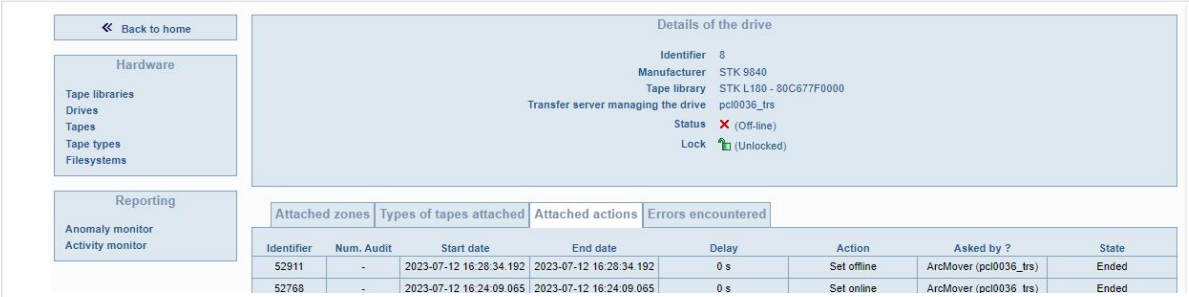


Figure 12.4. Displaying Drive Details

- *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

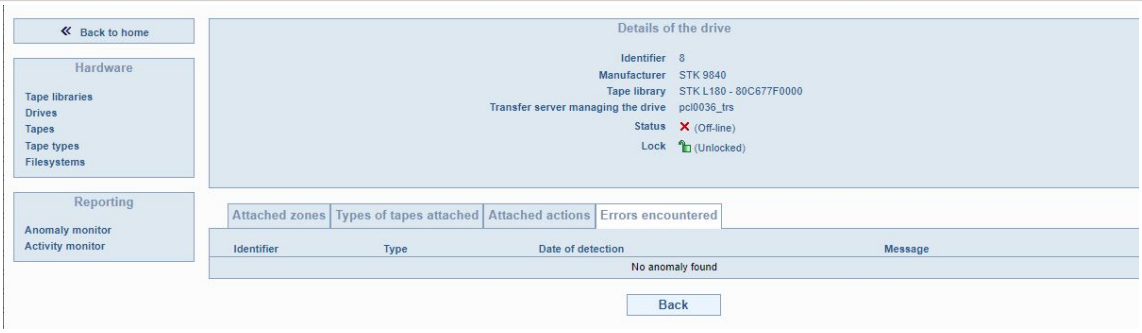


Figure 12.5. List of Drive Anomalies

- *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

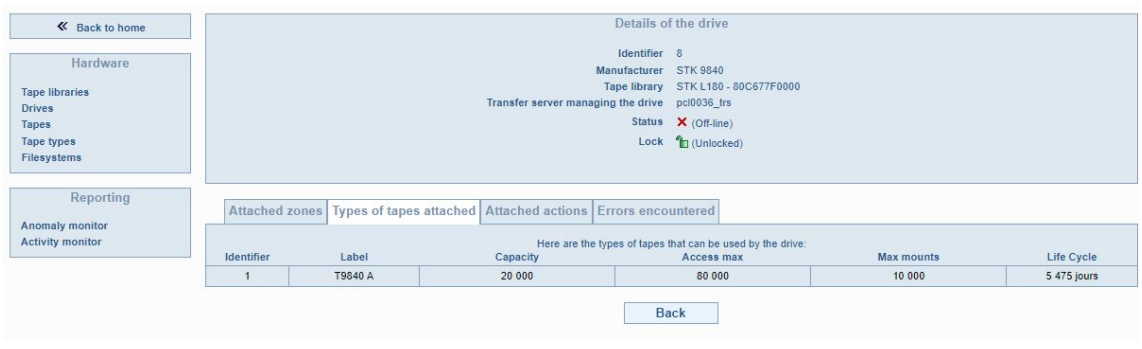


Figure 12.6. Tapes Types Associated with the Drive

- *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.

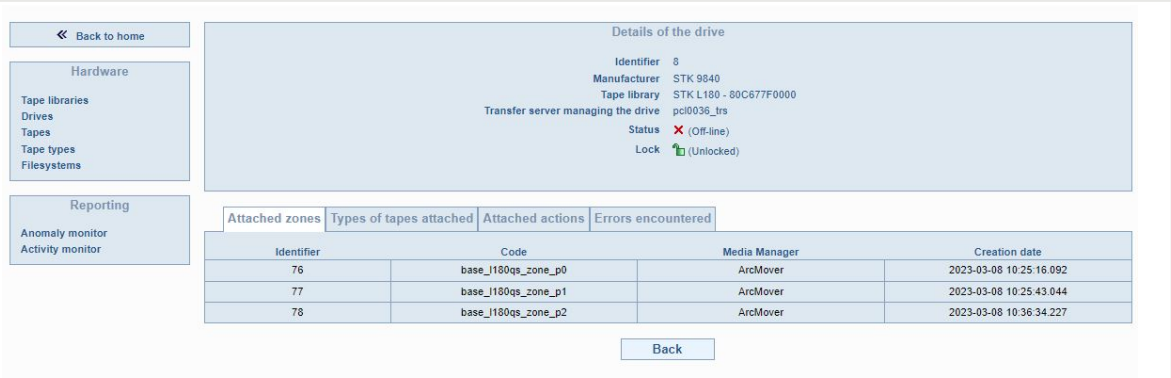


Figure 12.7. List of Zones Associated with a Drive

- *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

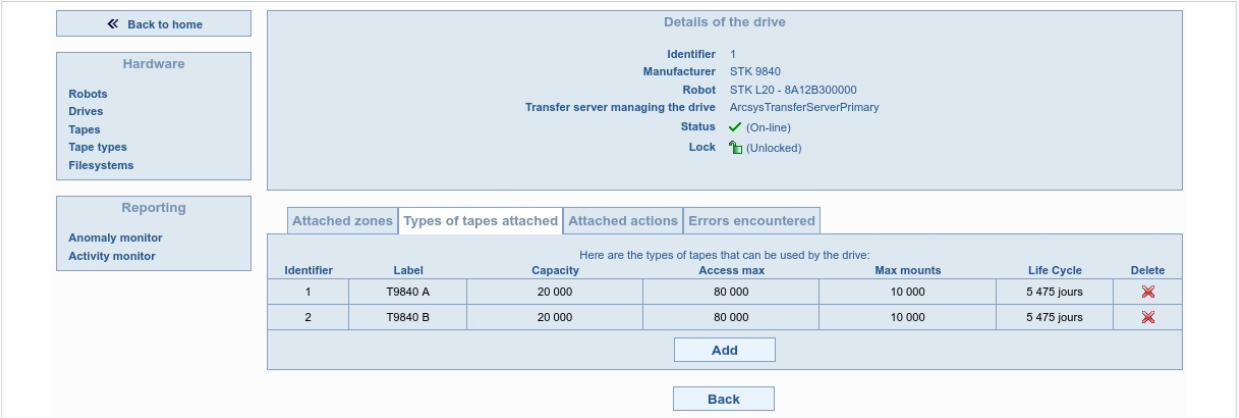


Figure 12.8. Editing the Tape Types attached to a Drive

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.

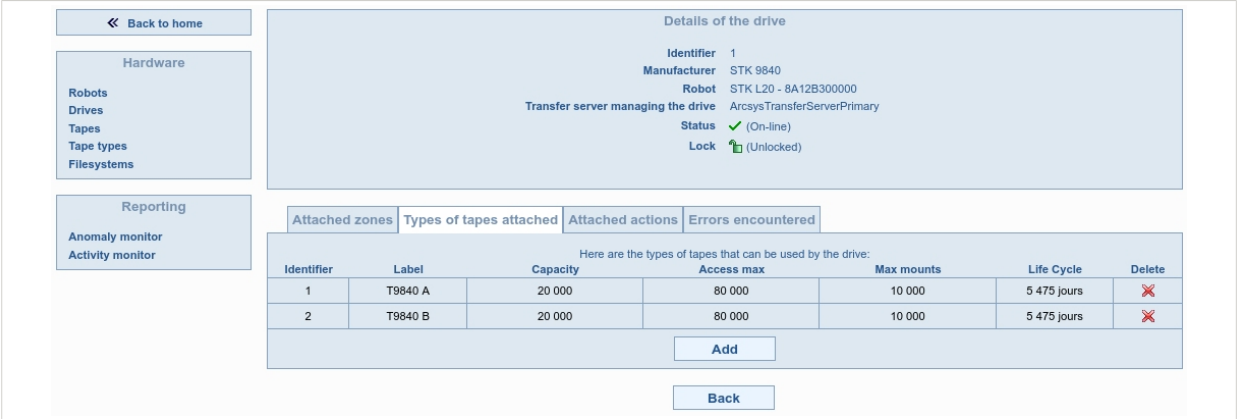


Figure 12.9. Associating a Tape Type with a Drive

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.

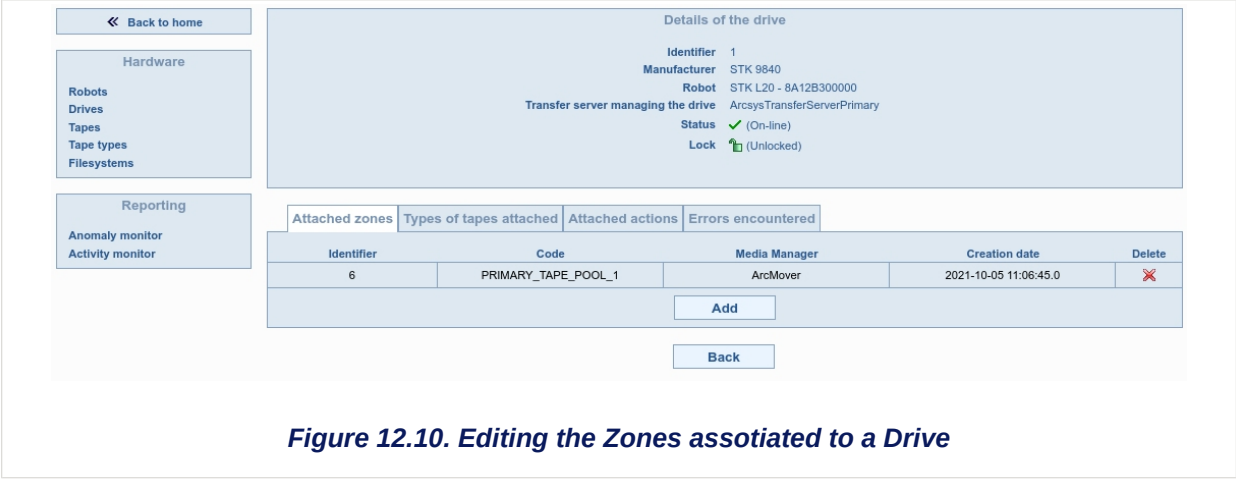


Figure 12.10. Editing the Zones assotiated to a Drive

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.

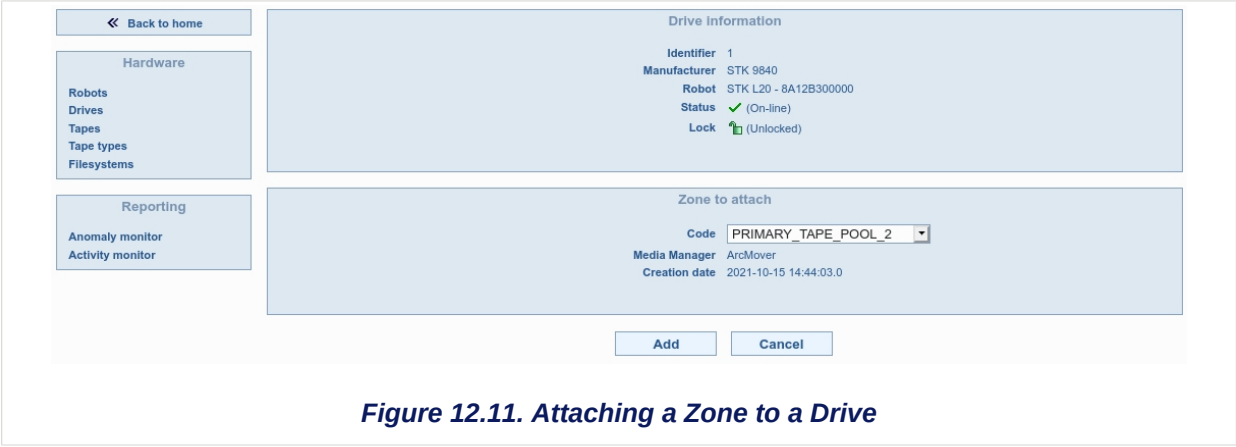


Figure 12.11. Attaching a Zone to a Drive

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.

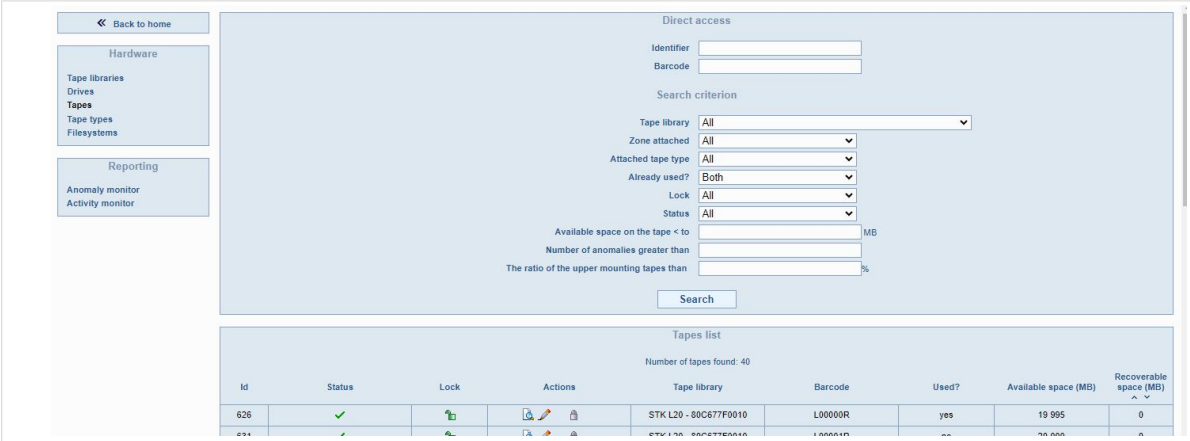


Figure 12.12. Tape List

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).

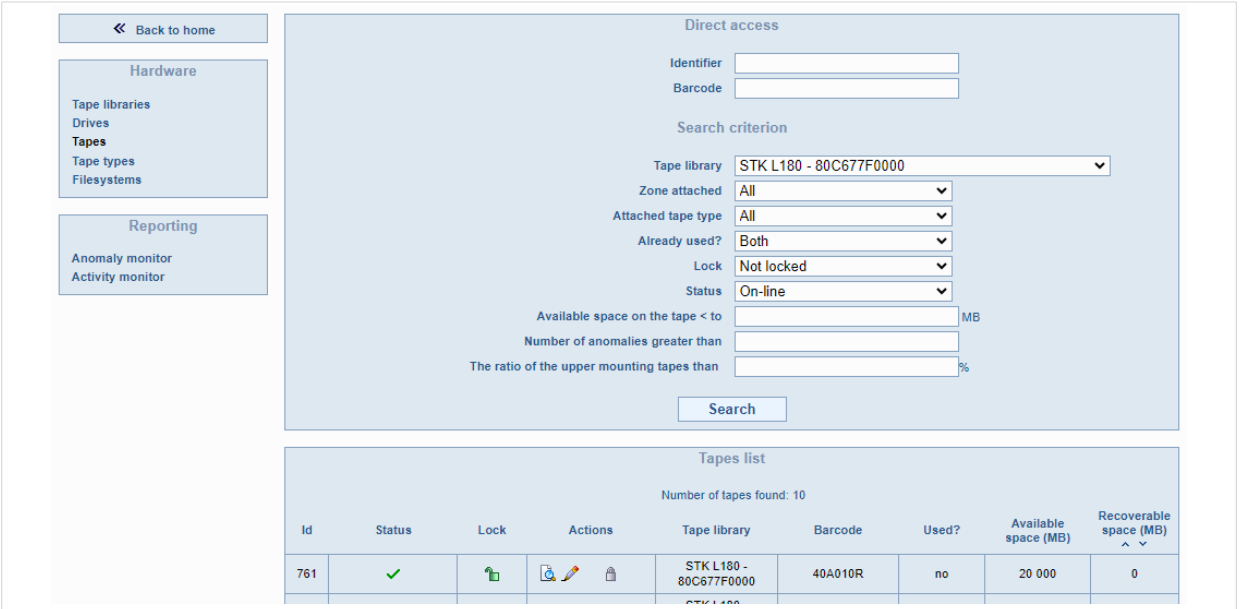


Figure 12.13. Display of Tape List According to the Search Criteria

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.

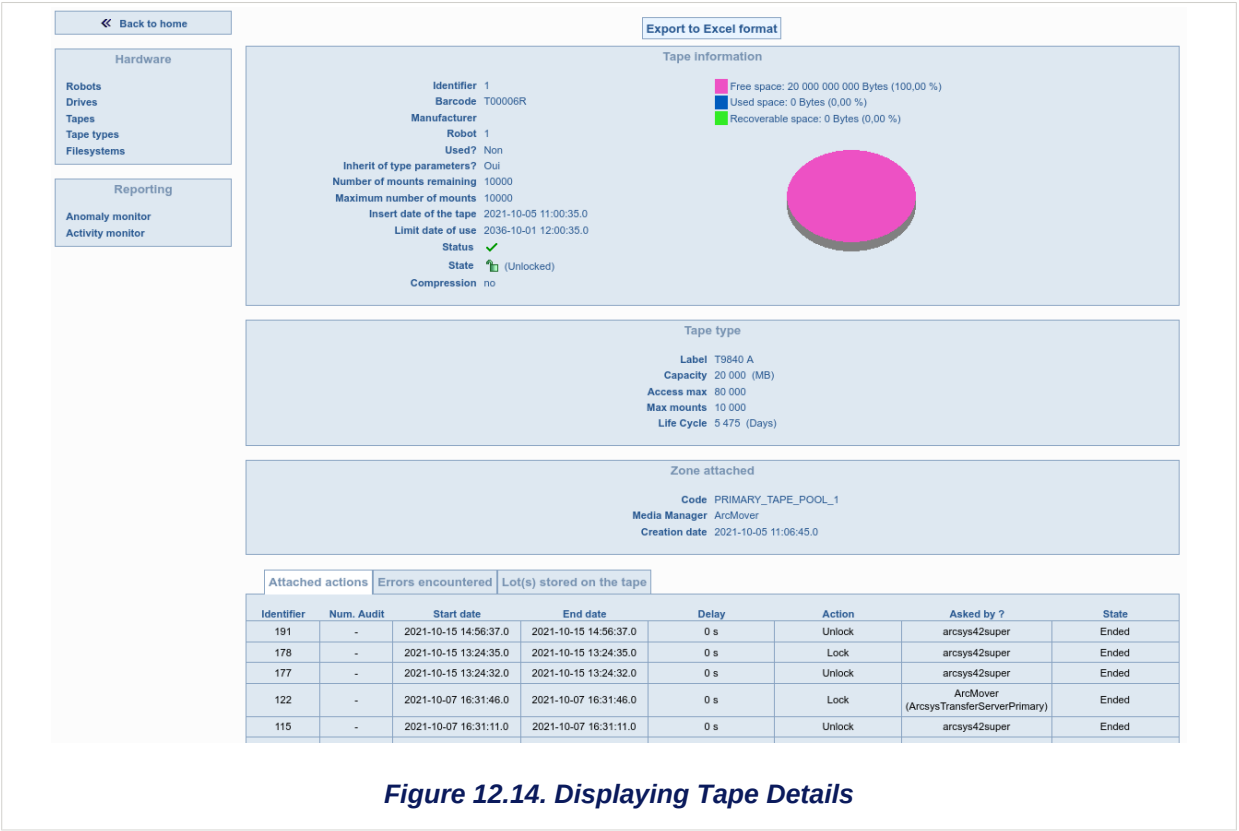


Figure 12.14. Displaying Tape Details

- *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

- *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

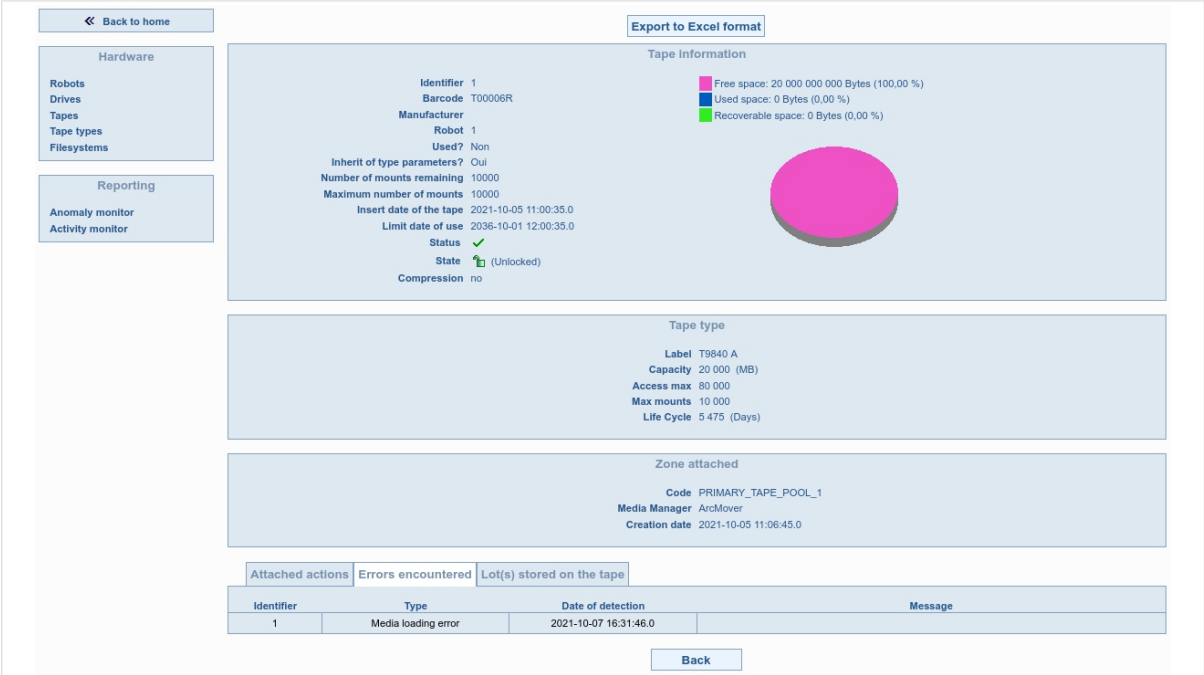


Figure 12.15. List of Tape Anomalies

- *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

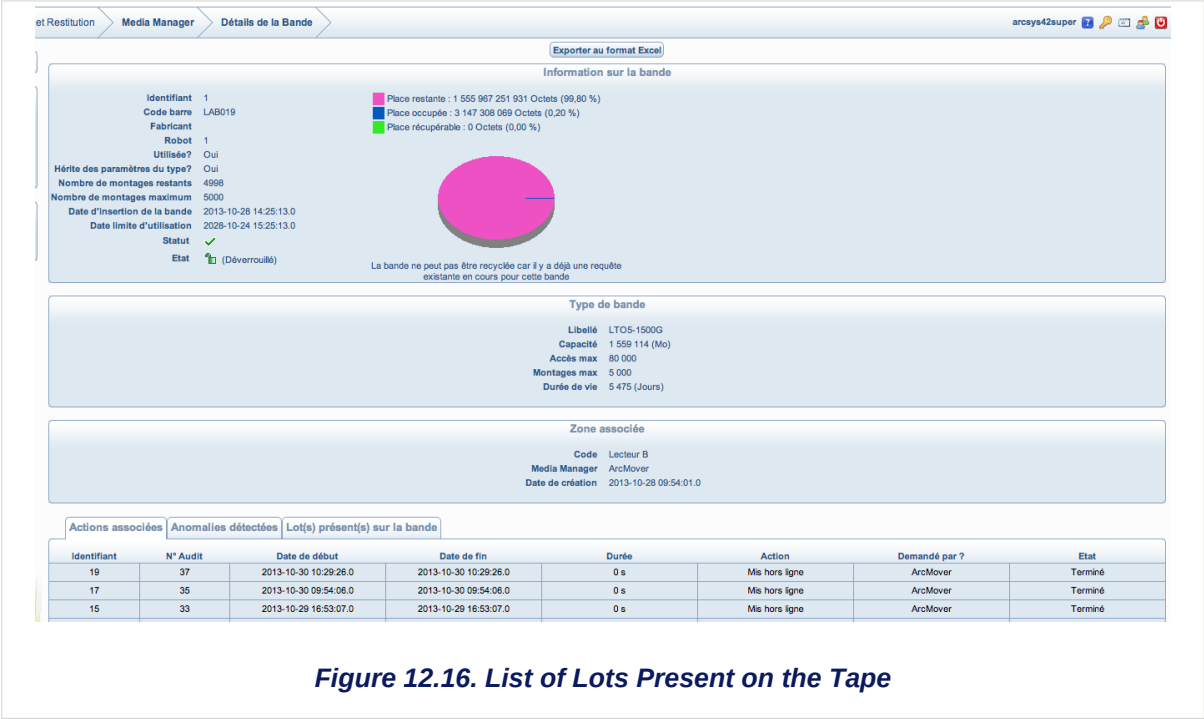


Figure 12.16. List of Lots Present on the Tape

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.

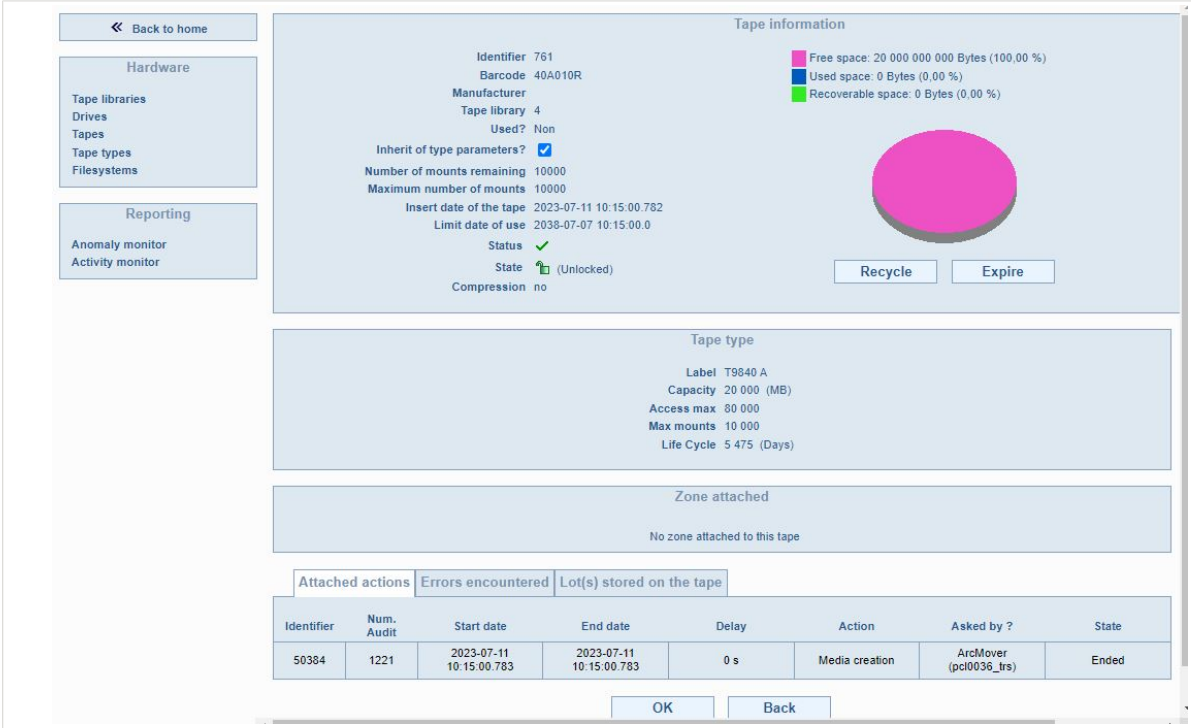


Figure 12.17. Editing a Tape

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.

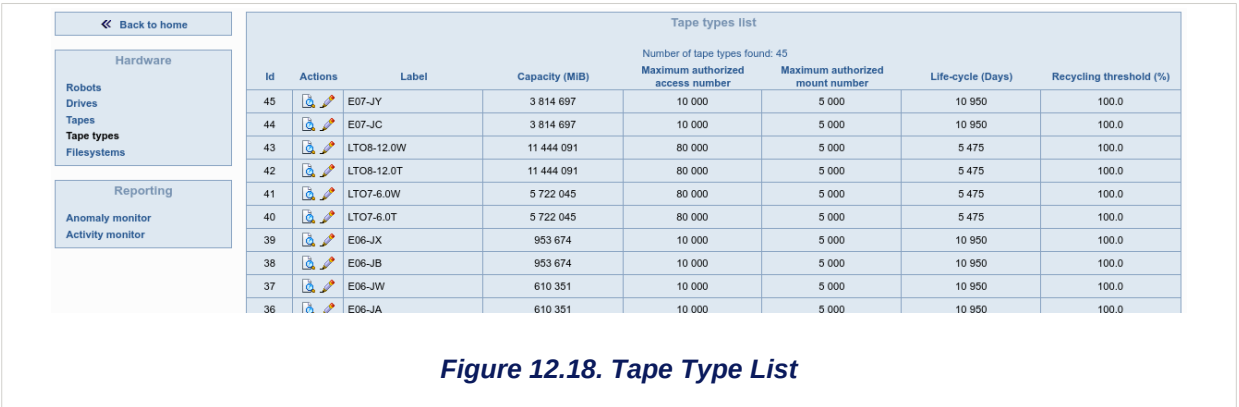


Figure 12.18. Tape Type List

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.

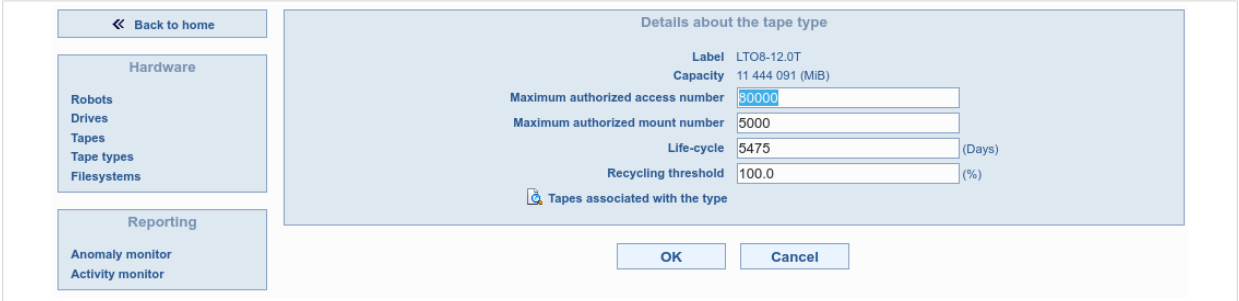


Figure 12.20. Changing Tape Type Details

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

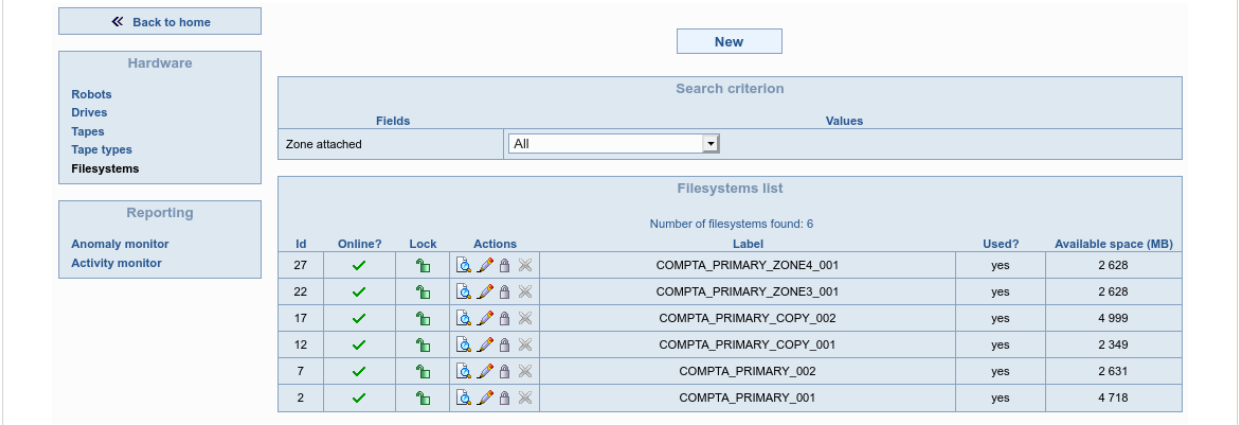


Figure 12.21. File System List

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

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.

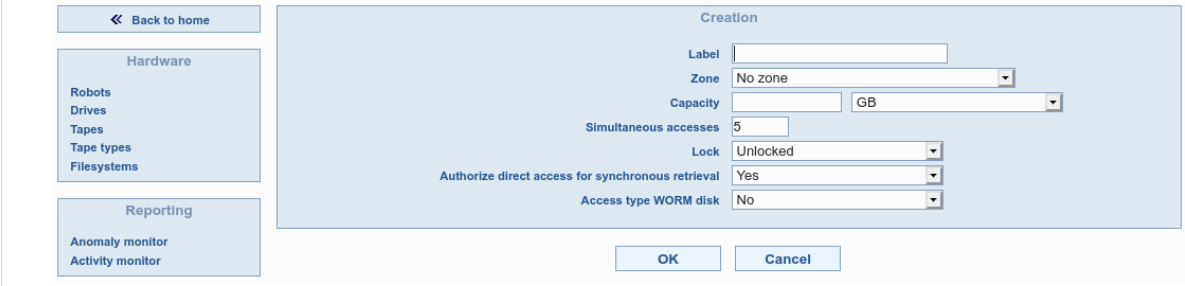


Figure 12.22. Creating a File System

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.

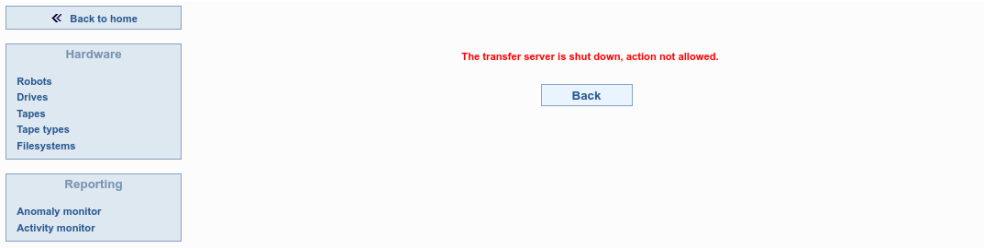
Lock: The initial state desired for the file system.

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.

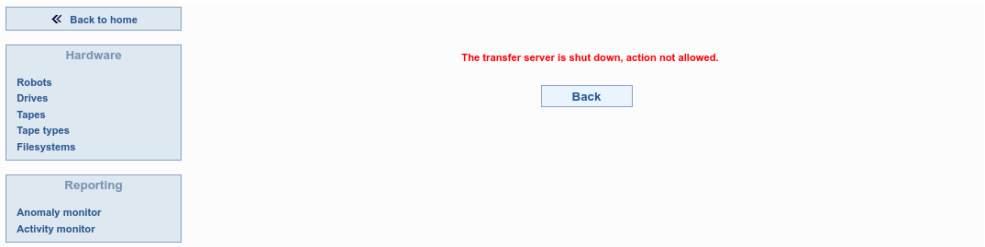
To unlock a file system,click on the icon of the line corresponding to the file system to unlock in the file systems list screen. Confirmation is required. The file system is then unlocked.

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.

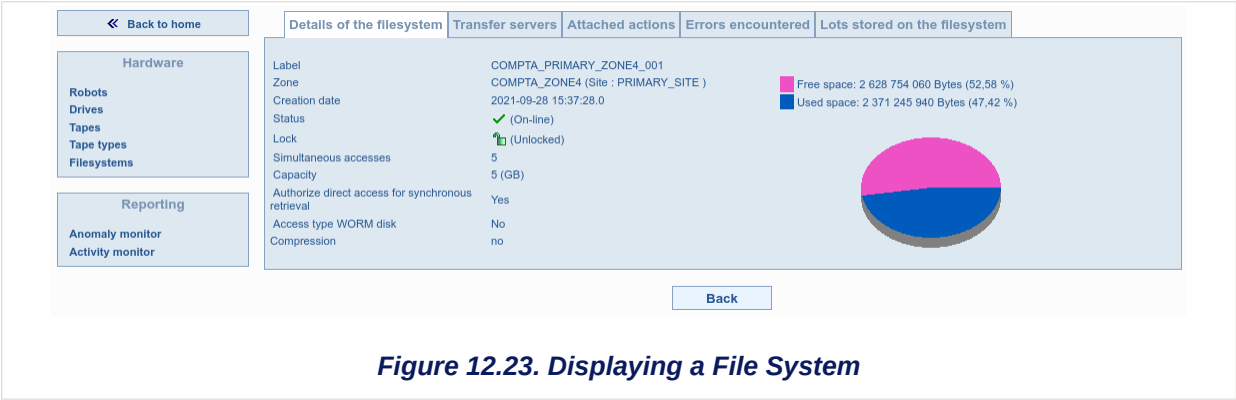


Figure 12.23. Displaying a File System

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

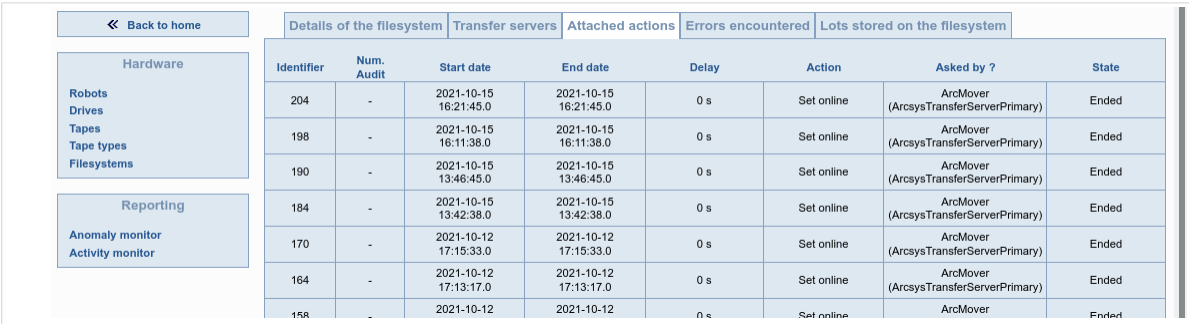


Figure 12.24. Actions Attached to a File System

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

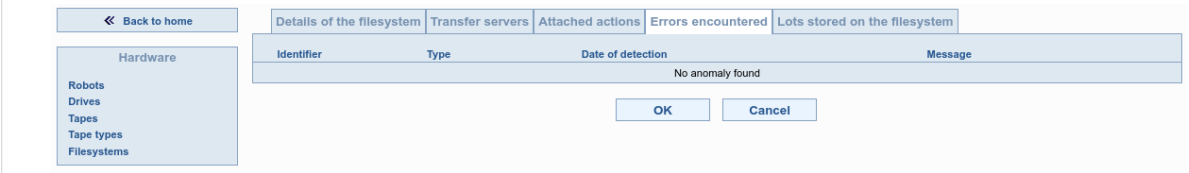


Figure 12.25. Errors encountered on a File System

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

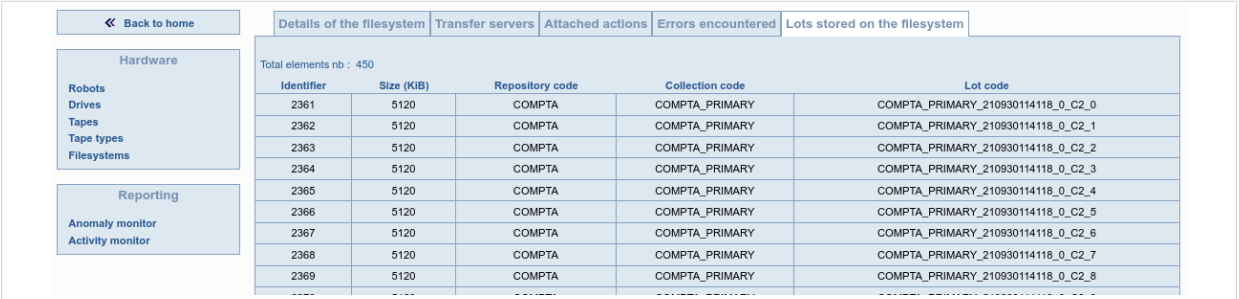


Figure 12.26. Lots Present on a File System

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.

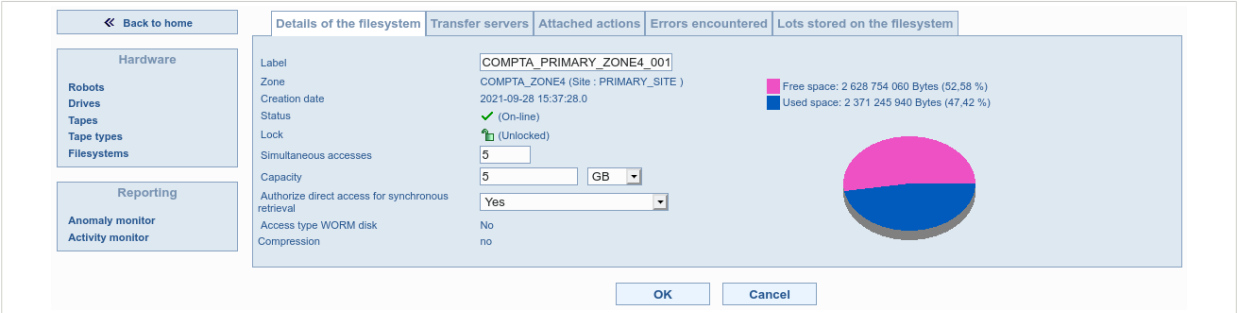


Figure 12.27. Changing a File System

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.

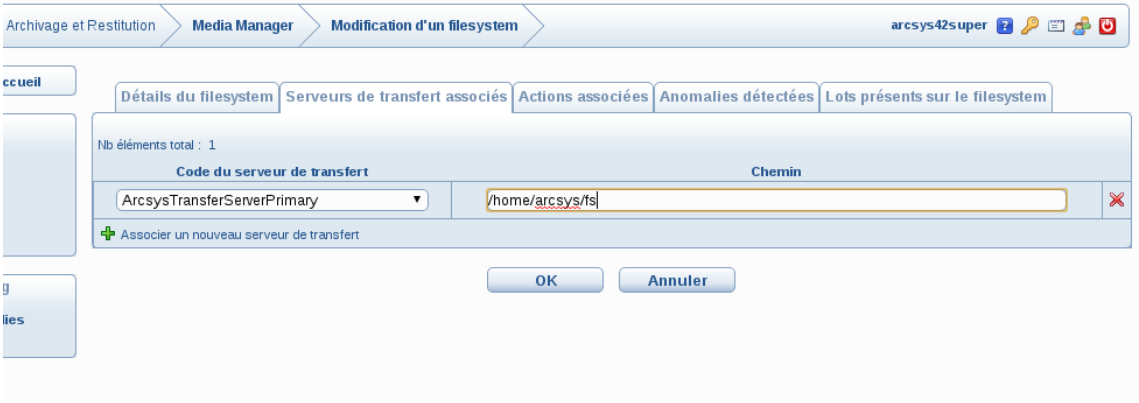


Figure 12.28. Transfer Servers Associated with a File System

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.

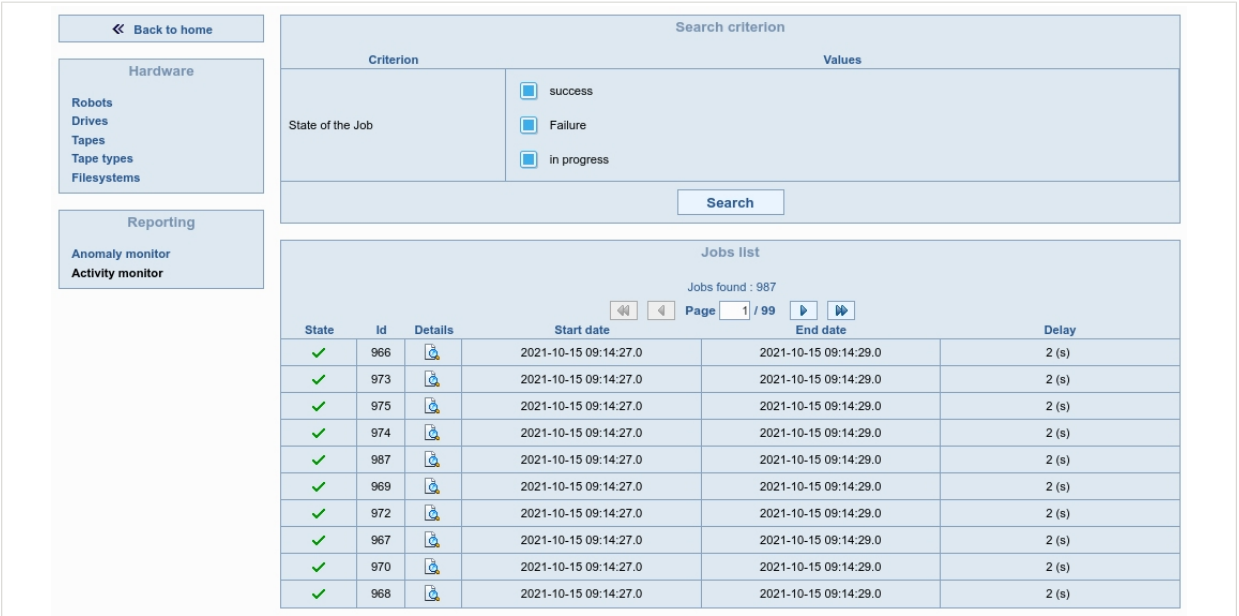


Figure 13.1. Activity Monitor

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

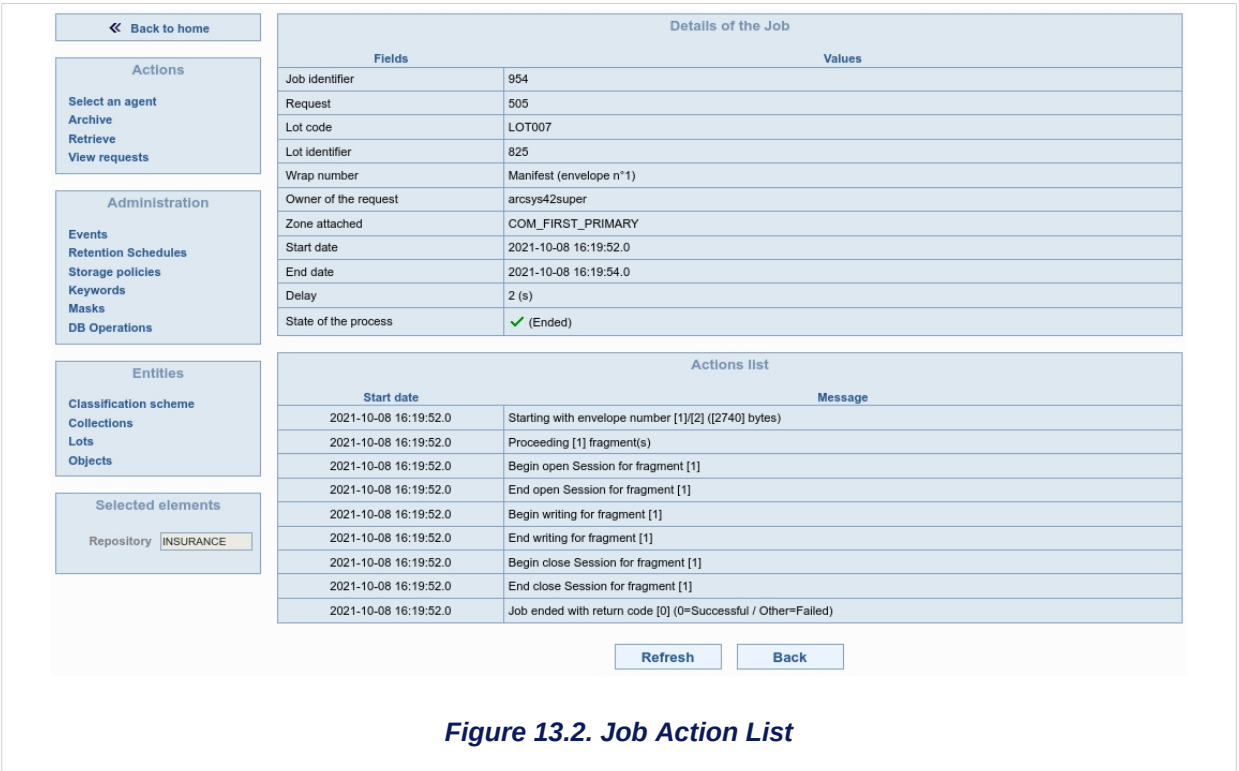


Figure 13.2. Job Action List

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.

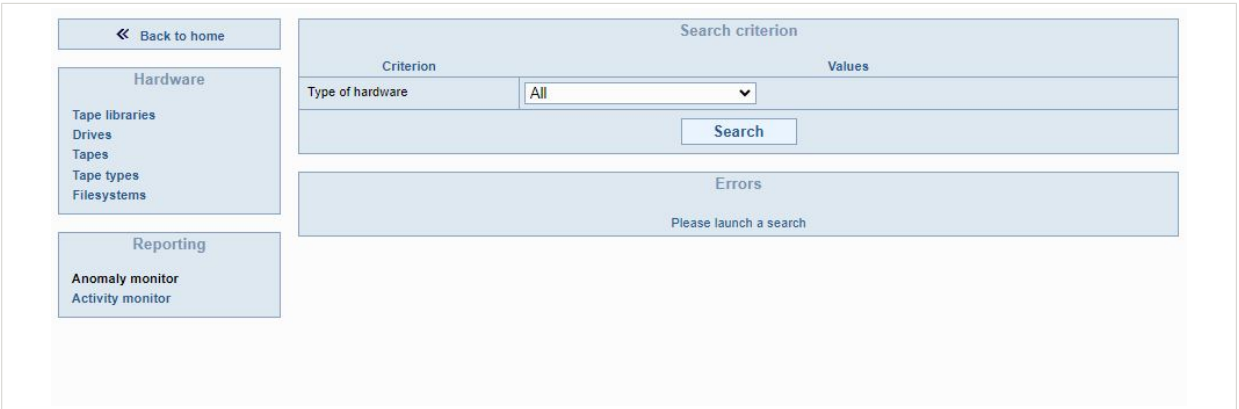


Figure 13.3. Anomalies Monitor

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

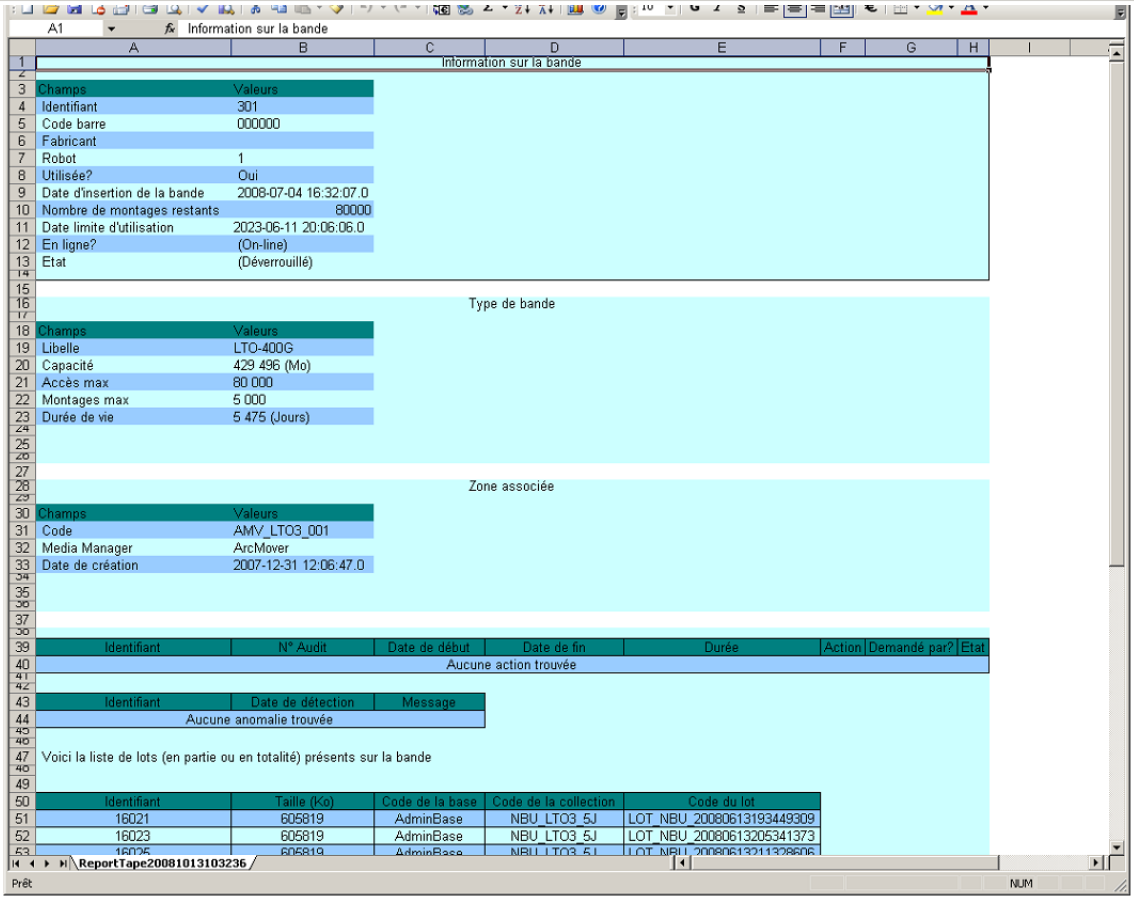


Figure 15.2. Microsoft Office Excel File Generated

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.

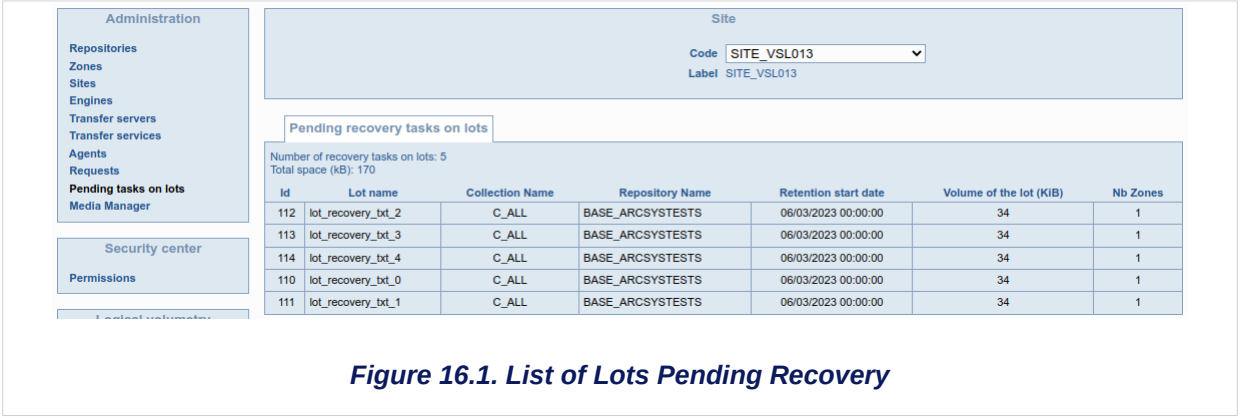


Figure 16.1. List of Lots Pending Recovery

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.

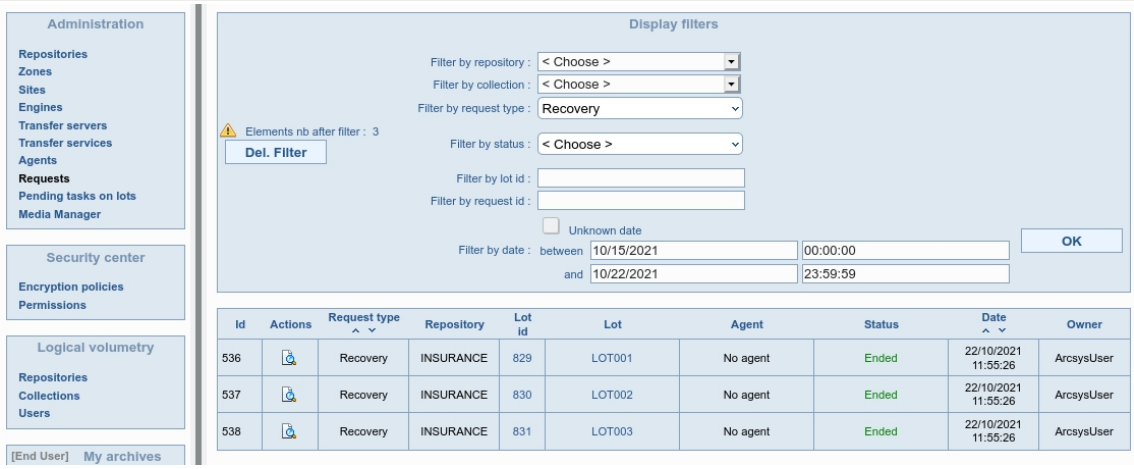


Figure 16.2. Tracking Recoveries

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

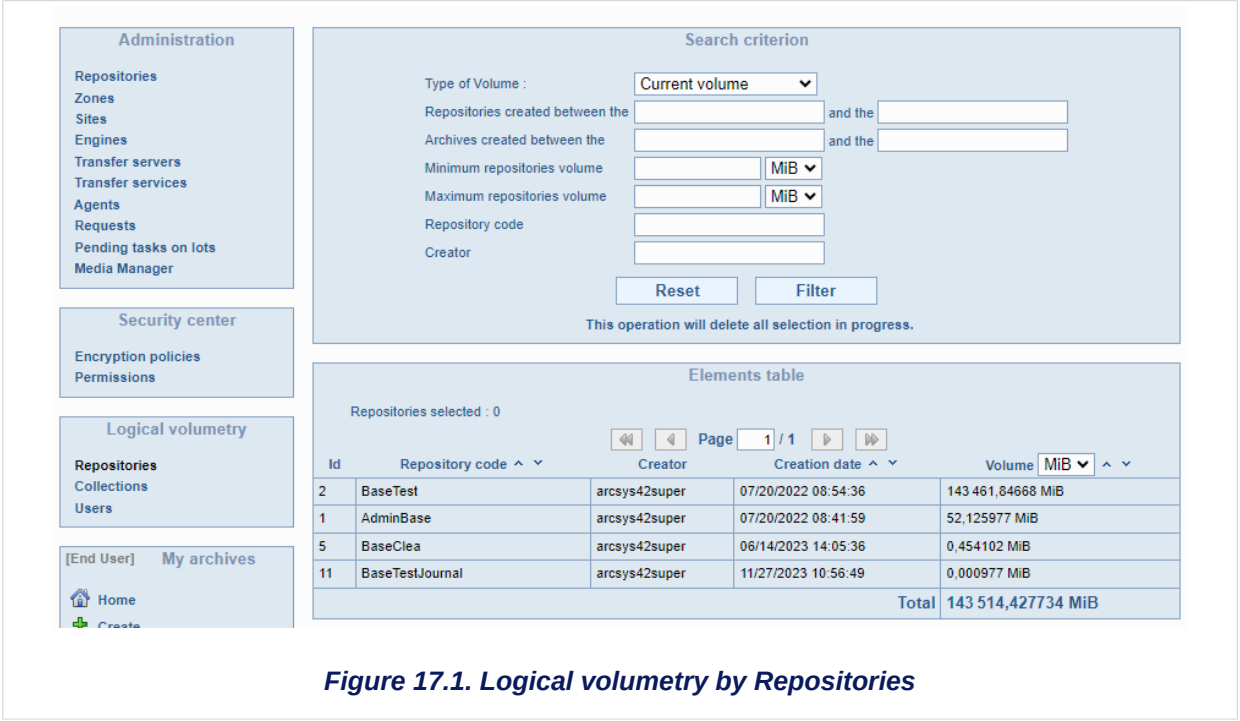


Figure 17.1. Logical volumetry by Repositories

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

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.

Archive By Reference
Archive 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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