Repository Archive Setup

Creating the Request Admin Profile Document

Open the Archive database using your Notes client.

Create - Other - Archive Admin Profile

Archive Manager

Enter the User ID of the Archive manager

Department, Phone and Email are optional (this database never sends email)

URL of this archive database:

Enter the URL used to open this archive database from a browser. This should include the filename of the database.

Production Repository

Server Name - enter the name of the server where all of the databases are located, this must be the server where the agents are scheduled.

File Name - enter the file name of the Repository Center database. Note: NOT the archive database!

Archive Operating Rules

Automatic Archiving Delay:

When a repository project is marked finished or completed, and when the "allow archiving" checkbox is set in the project profile, the project becomes a candidate for archiving.

The system adds this delay (which is expressed in days) to the effective date of the project completion or cancellation (which was entered when the project approval state was changed) to derived an effective "first date" for archiving. When this date arrives, the Auto-Archive Request agent will create an "archive project request" document. On the next archiving cycle, the project will be archived.

The purpose of the delay is to allow final timesheets to be posted, the request center status to be updated, and the Observatory to be updated with the final status of the project before archiving removes it from the repository.

The minimum delay is one day, the recommended setting is 14 days or longer.

Archive Timesheets Posted before this date:

Enter a date which may not be sooner than one month ago. When the archive process runs, any timesheets found prior to this posting date will be transferred to the archive.

Profile Documents:

This defines how Program, Organization, and Participant Profiles are duplicated in the archive. Project Profiles are archived with the projects, the others are copied to preserve the data structure but are never changed in the repository.

Default - *Maintain up to date copy* - whenever a newer version of a profile document is found, make a copy of it in the archive and replace any previous version.

Option **-** *Make copy when first encountered* **-** this copies a profile only once, It is somewhat more efficient, but the archive may not remain consistent with changes in organization or program structure.

Option **-** *Ignore* **-** when the selected profile will not be copied to the archive. This makes the archive more difficult to navigate.

Note: These profiles will never be deleted from the repository, the archiver copies them only to make the archive more useful to users.

Document Removal Method

THIS IS IMPORTANT

Option 1 - Mark source documents for removal by project repository purge agents

This is the recommended mode of operation because it allows archiving to be Undone for a period of time.

If selected, the archive will copy a document to the archive, verify its copy, and then change the form name of the original document in the repository so that it becomes a "Document Marked for Deletion" in the repository database. Note that the document still exists in the repository. Once marked however, it is a candidate for the PGDocumentPurge Agent which generally is configured to delete documents about 30 days after they are marked. Up until that time, the document can be "undeleted" by editing it from the All Deleted Documents view.

This is a conservative mode of operation that allows for the possibility or undoing a mistake (albeit with considerable manual effort required to restore many documents).

Option 2 - Physically delete source documents immediately

If selected, the archive will make a copy of the source document, verify its copy, and ***immediately physically delete the document*** from the production repository. Selecting the wrong project or deliverable to archive is then very serious because there is no simple way to restore the data. We do not recommend doing this unless you keep careful control on the use of the archive.

Option 3 - Archive Only - do not change source documents

If selected, the archive will make its copy, but will not change the production repository. This can be used as a way of testing the system or simply as a way of ensuring that some backup exists. Note however, you cannot copy document from the archive to the repository and expect them to be fully usable because the unique internal Notes identifiers will be different. So this is not a substitute for a proper database backup strategy. It is a harmless way, however, of testing the archive function.

Web Request Center Logo Setting

The URL of the logo file will be shown here. It is set with the SetLogo Action which is displayed at the top of this form when you display the form from a web browser. The logo cannot be set by a Notes Client, it must be done via a browser. Note that the logo is only displayed for browser clients.

Testing Web Operation

Open the Repository using your web browser.

If the repository database is properly configured, a link labeled "ARCHIVE" should appear in the lower part of the center panel on the Repository Center home page next to the words "GO TO". Clicking this link should open the Archive Center database home page.

> Note: If this link does not appear or does not work, the Repository Administration form was not correctly completed. Revisit the Repository Suite, Observatory and Portal Setup instructions found in the previous chapter and check the Archive Center entry.

When the Repository Archive home page appears...

Click on "Archive Administration" from the horizontal menu to open the Archive Administration Navigator

Click on the words "Archive Profile". This will open the Archive Profile view.

Click on the words "Archive Profile" This will open the profile document for display.

At the top of the form is the action "WebHome."

Click on it.

This should display the Repository Archive home page again. If not, then the "URL for this database" is not properly entered and should be corrected before proceeding.

Setting a Logo

When the WebHome action operates correctly...

Click on Administration, Archive Profile and Archive Profile again.

If you have a logo file (.gif or .jpg file) available, click on "SetLogo"

On the form, use the "browse" button to select the file.

Submit the Set Logo Form.

The system will reopen the Repository Archiver database with the logo incorporated in the center display area. You can repeat the SetLogo action as often as necessary until you get the desired picture.