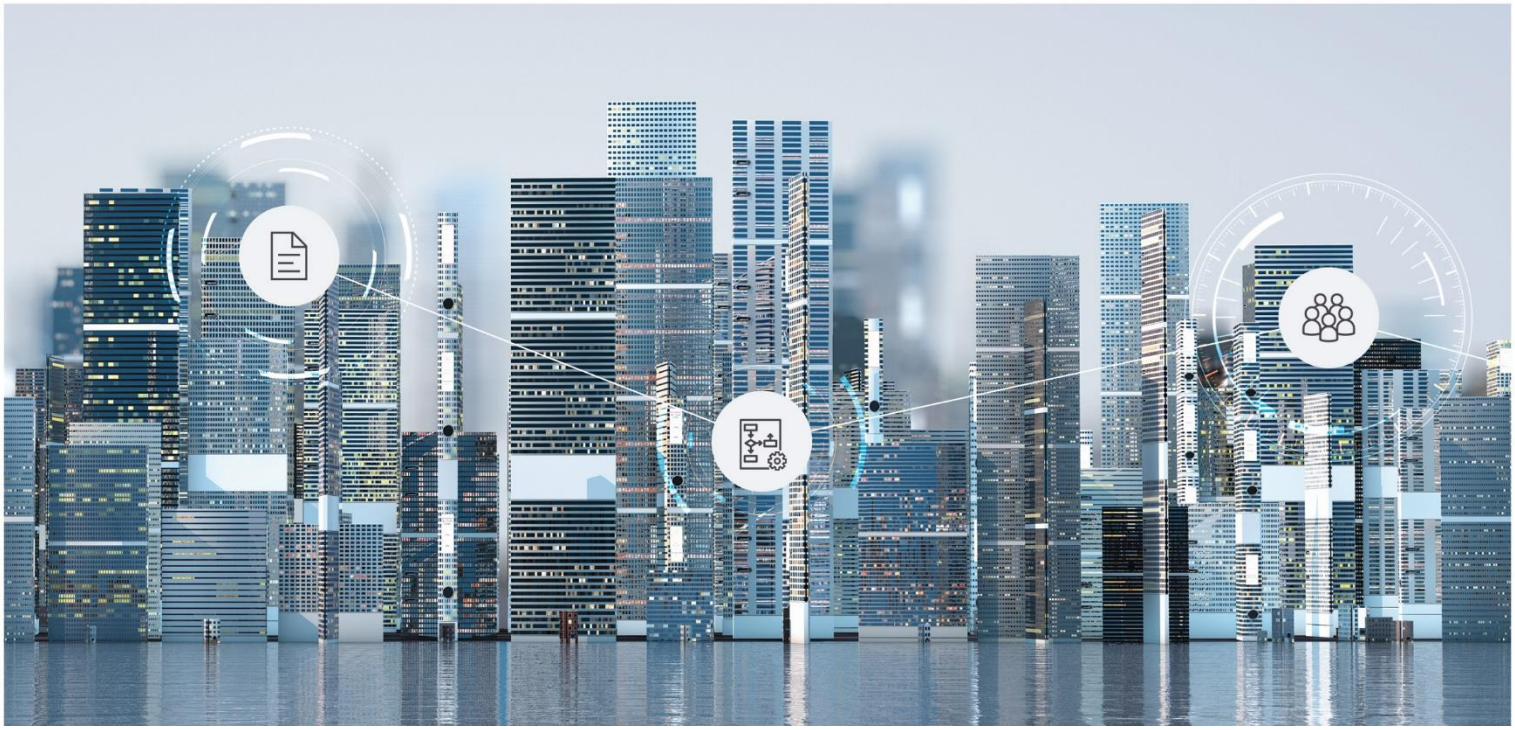
Fabasoft



White Paper

Installation and Configuration of Fabasoft iArchive

Fabasoft Folio 2024 Update Rollup 1

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Contents

1 Introduction ____ **4**

2 Software and Hardware Requirements ____ **4**

3 Installation of Fabasoft iArchive ____ **4**

3.1 Automated Setup 4

3.2 Update of Fabasoft iArchive 6

4 Configuration in Fabasoft Folio ____ **6**

4.1 Archive Store 6

4.2 MMC Store 9

1 Introduction

This document describes the installation and configuration of Fabasoft iArchive in a Microsoft Windows environment using an existing Fabasoft Folio Domain.

2 Software and Hardware Requirements

System environment: All information contained in this document implicitly assumes a Microsoft Windows environment.

Supported platforms: For detailed information on supported operating systems and software see the software product information on the Fabasoft distribution media.

Descriptions in this document are based on the following software:

- Dell EMC ECS 3.4
  For the integration for Dell EMC ECS, the Centera SDK Version 3.4 is used.

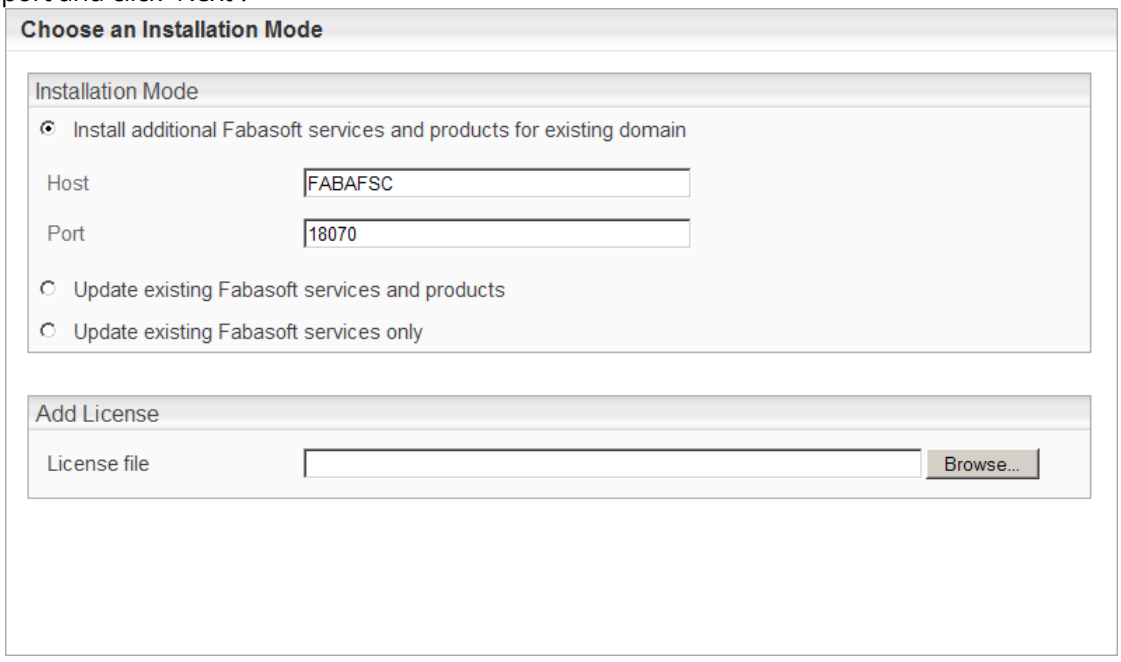
3 Installation of Fabasoft iArchive

This chapter describes the installation of Fabasoft iArchive.

3.1 Automated Setup

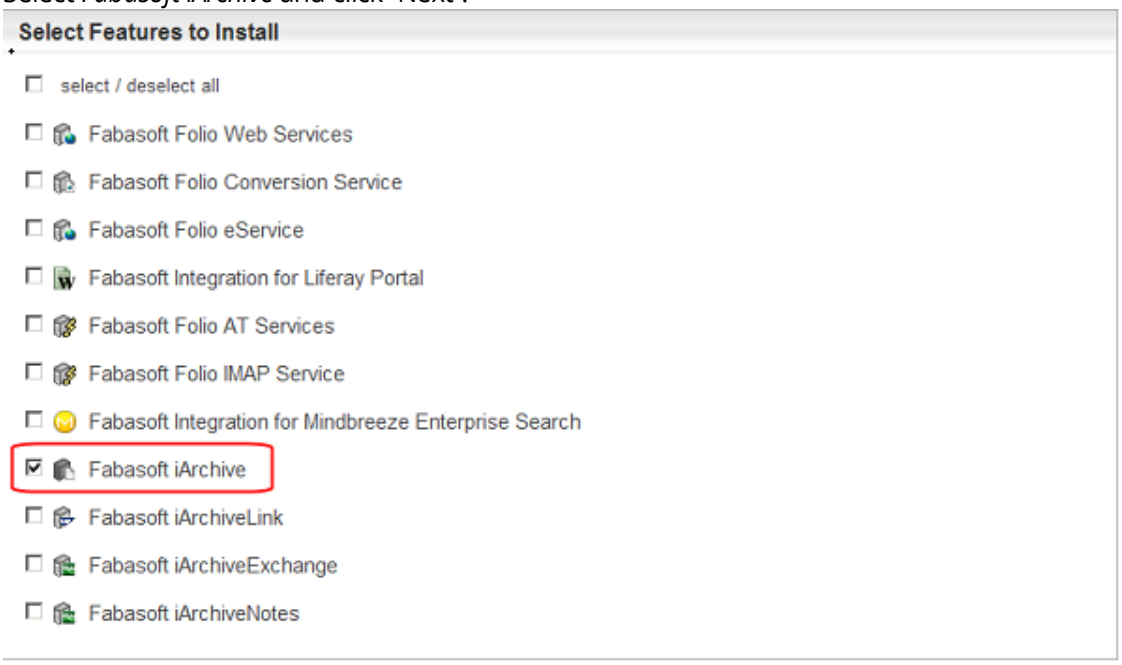
To install Fabasoft iArchive via the automated setup, perform the following steps.

1. Insert the Fabasoft product DVD in the DVD drive of your server. The Fabasoft Server Setup dialog will be displayed automatically.
   Note: If this dialog is not displayed automatically, run `setup.exe` in the root directory of the Fabasoft product DVD.
2. Accept the Fabasoft legal terms and click "Next".
3. Select *Install additional Fabasoft services and products for existing domain*, enter the host and the port and click "Next".

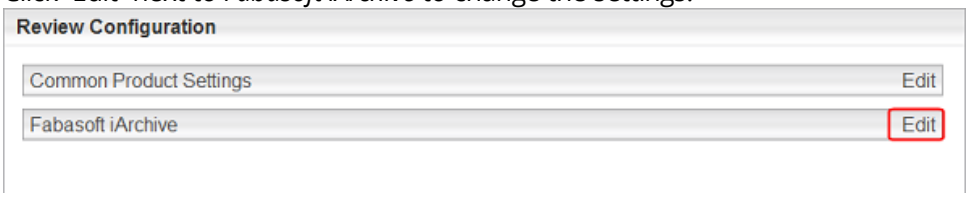


Note: Fabasoft iArchive can also be installed during the initial setup of the Fabasoft Folio Domain. In this case additionally select *Fabasoft iArchive* when installing the other services and products.

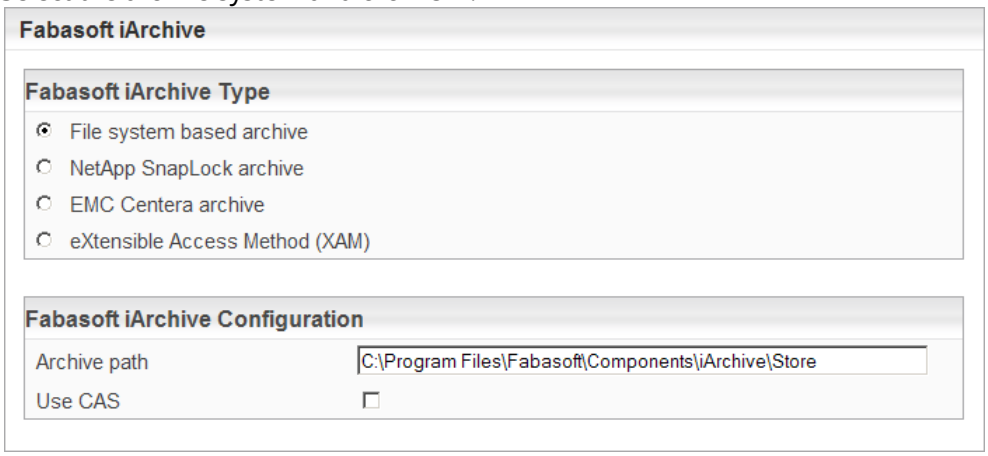
4. Select *Fabasoft iArchive* and click "Next".



5. A check on all prerequisites is performed. Ensure that your system complies with all requirements (indicated by a green tick) and then click "Next".
6. Click "Edit" next to *Fabasoft iArchive* to change the settings.

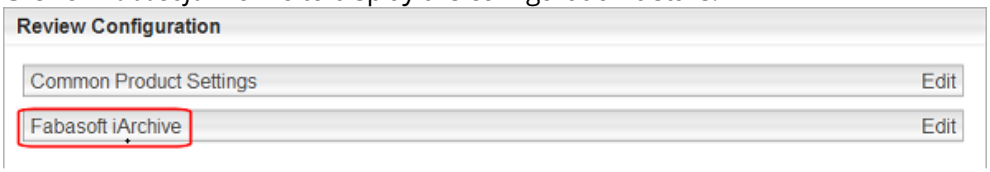


7. Fabasoft iArchive can be installed for the following archive systems:
   - a file system based archive (*Filesystem based archive* checkbox)
   - an EMC² Centera archive (*EMC Centera archive* checkbox)
8. Select the archive system and click "OK".

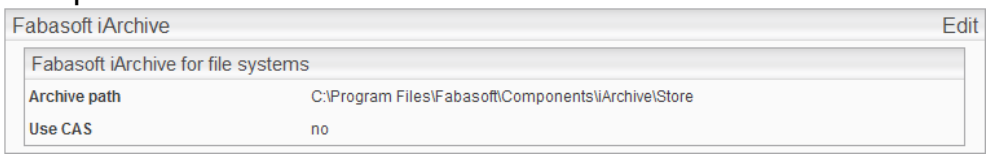


Note: The *Use CAS* checkbox defines whether content addressed storage is switched on or off. By selecting this checkbox contents or files are stored in a single instance storage procedure.

9. Click on *Fabasoft iArchive* to display the configuration details.



10. Verify the configuration settings.
    Example:



11. Click "Install" to start the installation.
    Fabasoft iArchive is installed.
12. Click „Finish".

3.2 Update of Fabasoft iArchive

When updating Fabasoft iArchive from a version earlier then 2009 Fall Release and if an EMC² Centera which cannot be accessed via anonymous access is in use, the PEA (pool entry authorization) file has to be uploaded into the content property *PEA File* of the *Archive Store* object manually after updating the Fabasoft Folio Domain.

See also chapter 4.1 Archive Store.

4 Configuration in Fabasoft Folio

To be able to use Fabasoft iArchive for archiving Fabasoft Folio objects (meta data, contents, versions), the following configuration steps are necessary:

- the creation of *Archive Stores* (see chapter 4.1 "Archive Store") and
- the assignment of object classes to *Archive Stores* (configured in the *MMC Stores*, see chapter 4.2 "MMC Store").

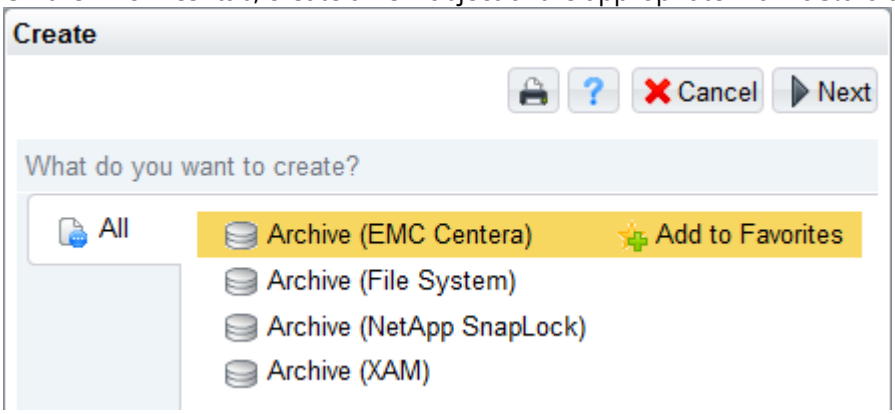
4.1 Archive Store

An instance of object class *Archive Store* is used to define where and how Fabasoft Folio objects will be archived.

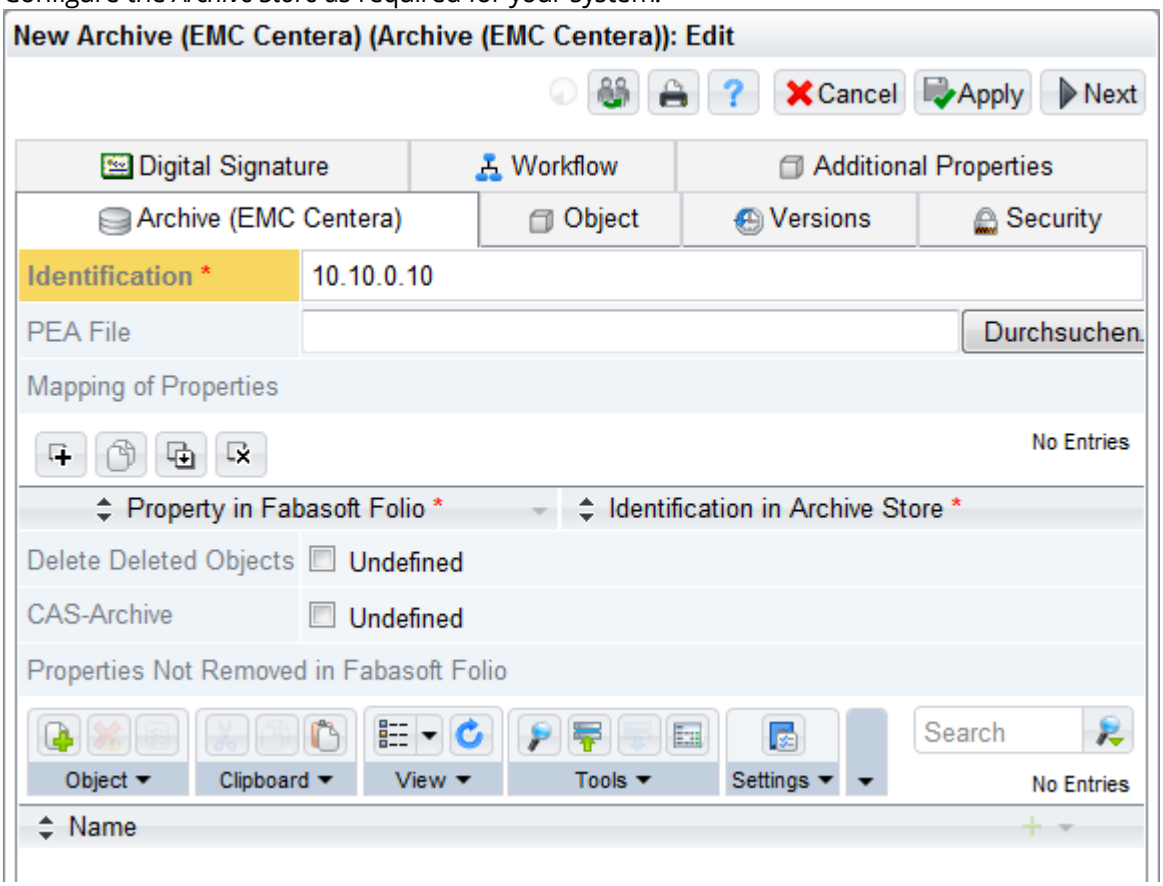
To create and configure an *Archive Store* for archiving Fabasoft Folio objects in a Fabasoft Folio Domain, perform the following steps:

1. In the *Domain Administration*, navigate to the *Domain Objects* object list.
2. Click the "Archives" tab.

3. On the "Archives" tab, create a new object of the appropriate *Archive Store* object class:



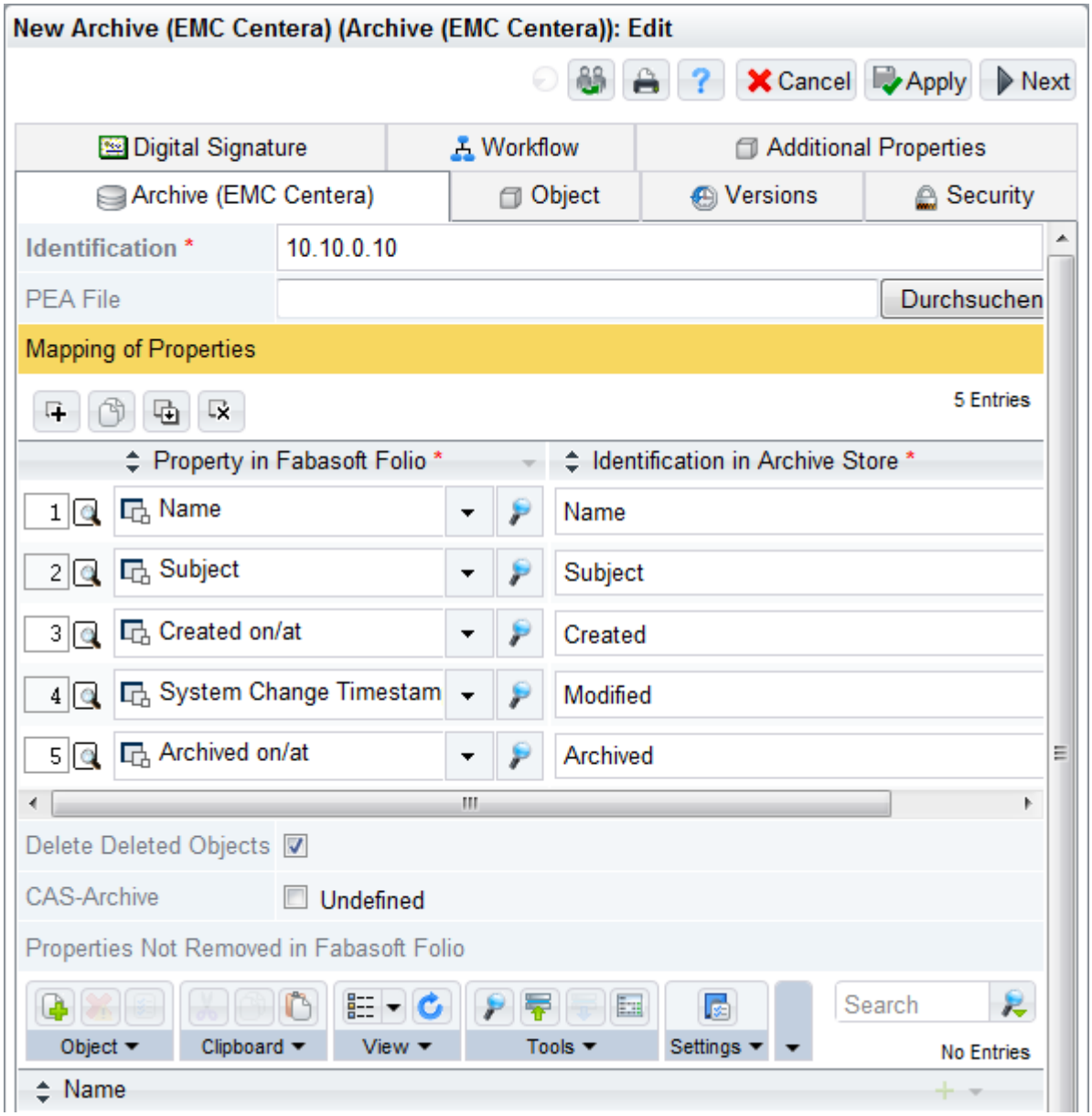
4. Open the *Archive Store* in edit mode.
5. Configure the *Archive Store* as required for your system.



- *Identification*
  In this field type a string identifying the path for archiving Fabasoft Folio objects.
  File system: Type the path to the file system directory the objects will be archived in.
  EMC² Centera: Type the IP address of the EMC² Centera cluster the objects will be archived in or a string with comma separated IP addresses to add multiple clusters or replicas.
- *Mapping of Properties*
  In this field the meta data that will be archived and the field names of the meta data in the corresponding XML file can be defined.
  The field *Property in Fabasoft Folio* is used to specify meta data that will be archived. In the *Identification in Archive Store* field define the name of the meta data used in the XML file the meta data will be stored in.

- *Delete Destroyed Objects in Archive*
  This option defines whether objects will also be destroyed in the archive system if they are destroyed in Fabasoft Folio. Click "Yes" if destroyed objects should be deleted in the archive. Click "No" if destroyed objects should not be deleted in the archive.
- *CAS-Archive*
  Define whether content addressed storage is switched on or off. By selecting this checkbox contents or files are stored in a single instance storage procedure.
- *Properties Not Removed in Fabasoft Folio*
  In this field specify the properties that have to remain in Fabasoft Folio after archiving. These settings are necessary if references pointing to properties exist that are also needed after archiving or if the properties should remain searchable.
- *PEA File*
  If EMC² Centera should be used and it cannot be accessed via anonymous access, a PEA (pool entry authorization) file is required. Upload the PEA file into this field to access the EMC² Centera cluster.
  Note: Only available on *Archive (EMC Centera)* objects.

Example:



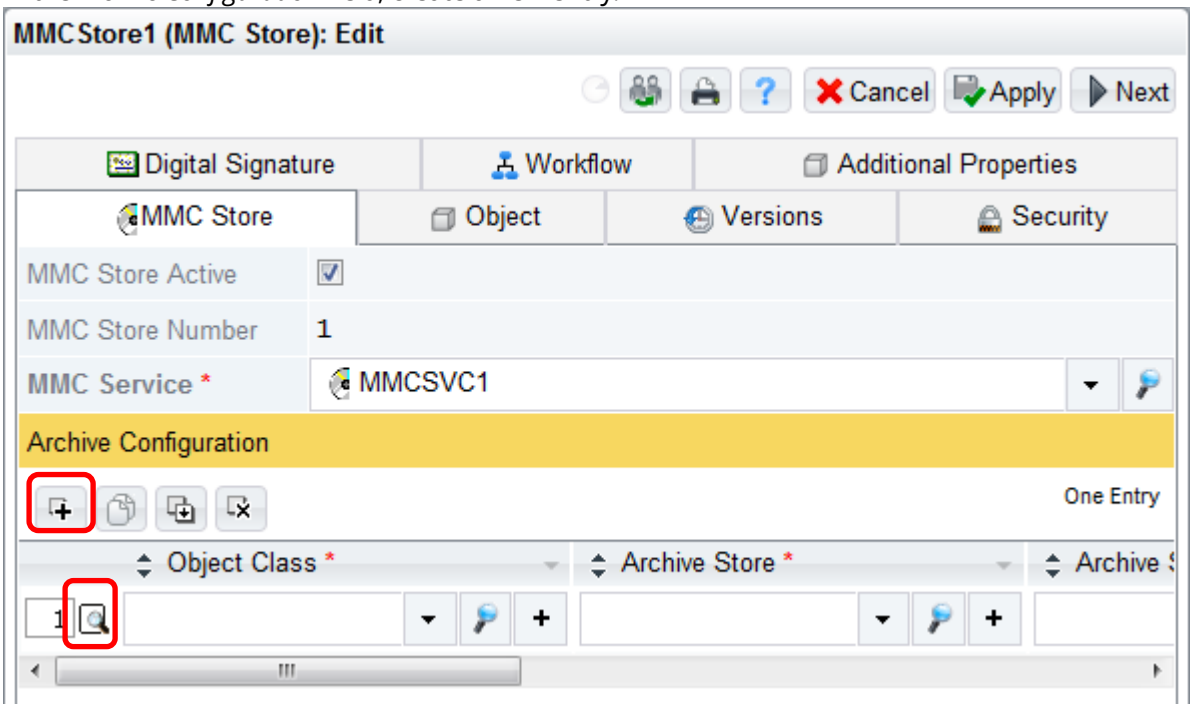
4.2 MMC Store

In the *MMC-Stores*, the *Archive Stores* that should be used for archiving objects of specific object classes are specified.

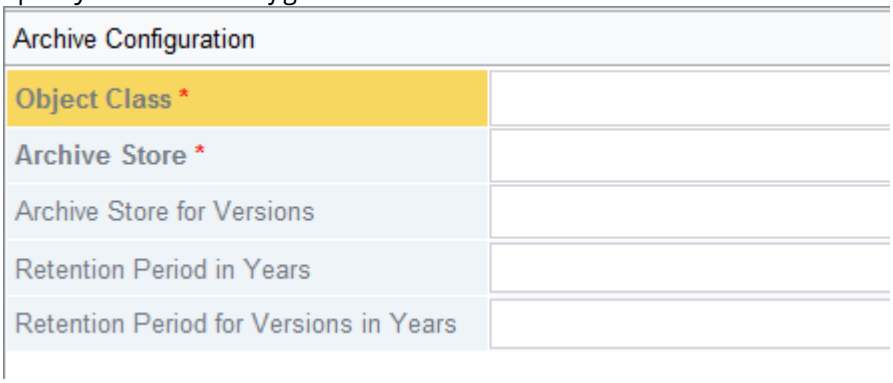
To specify which *Archive Store* will be used for archiving objects of specific object classes, perform the following steps.

1. In the *Domain Administration*, navigate to the *Domain Objects* object list.
2. Click the "Stores" tab.
3. Open the *MMC Store* that should be configured for archiving in edit mode.

4. In the *Archive Configuration* field, create a new entry.



5. Click "Open Detail" to open the new configuration entry in detail view.
6. Specify the *Archive Configuration*.



   - *Object Class*
     Select the object class the configuration entry is defined for. Objects of this object class will be archived to the *Archive Store* defined in the *Archive Store* field.
   - *Archive Store*
     Select the archive store the objects of the object class defined in the *Object Class* field will be stored in.
   - *Archive Store for Versions*
     Define an archive store where the versions of the archived objects will be stored in.
     Note: This setting is only necessary if objects versions should be archived separately from the current versions.
   - *Retention Period in Years*
     Define a number of years how long objects will be preserved in the archive.
     Note: This functionality is only available if EMC² Centera is used.

- *Retention Period for Versions in Years*
  Define a number of years how long object versions will be preserved in the archive.
  Note: This functionality is only available if EMC² Centera is used.

Repeat steps 4 and 5 until an archive configuration exists for all required object classes.

To accept all settings and close the properties of the *Archive Configuration* and the *MMC Store*, click "Next".