Auto Archive

**Addendum to halFILE for Windows™
Document Storage & Retrieval**

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hal

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Overview

halFILE for Windows 2.0 includes a new Auto Archive feature to not only Archive selected baskets to selected cartridges, but also:

1. Manage the amount of space used by the archive to facilitate the creation of backup CDs or DVDs, without requiring a Stage Drive (a hard disk partition the size of the backup media).
2. Generate e-mail messages of activity performed by the Auto Archive.
3. Backup data that applies to the images that were archived to the partition for disaster recovery purposes.
4. Automatically create new cartridges when needed.

Essentially, this eliminates several manual steps that were required with halFILE 1.4 and earlier.

Programs Required

The following programs are used to support the new features:

    HFW20.EXE
    HFARCHIVE32.EXE
    HFFEATURE32.EXE

All of the programs are delivered on the halFILE 2.0.CD.

Changes to Access Databases

PARAMTRS.MDB

If it has not been done already, the Cartridges table should be changed to the following layout:
(new installs will create the table like this when PARAMTRS.MDB is created)

Ordinal	Fieldname	Datatype	Zero Length	Size
0	CartName	Text	False	8
1	CartDesc	Text	True	30
2	CartType	Text	True	3
3	CartPrefix	Text	True	30
4	ArchiveEnabled	Integer	False	2
5	MBLimit	Double	False	8
6	BytesUsed	Double	False	8
7	NewCart	Byte	False	1

NOTE: When these fields are added, zero-fill the [BytesUsed] and [NewCart] fields for all existing cartridges.

HFFEATURE.MDB

Add the following feature set to the features database (if they do not already exist). This would be typically done using Visdata.exe:

RecordType	Application	DocType	User_ID	Feature	FeatureDesc	FeatureEnabled
H	XXX	XX	X	0	Search: File – Delete Document	-1
H	XXX	XX	X	1	halviewer: Image Annotations	-1
H	XXX	XX	X	2	halviewer: File - Save menu	-1
H	XXX	XX	X	3	halviewer: File - Save As menu	-1
H	XXX	XX	X	4	halviewer: File - Open image	-1
H	XXX	XX	X	5	halviewer: OCR features	-1
H	XXX	XX	X	6	Archive: Automatic Cartridge Assignment	-1
H	XXX	XX	X	7	General: System Messaging	-1

Configuring Auto Archive

To configure Auto Archive, run the Archive icon from the halFILE Manager. Then select the **Configure-Auto Archive** menu. Select an Archive Set from the drop down list (select <NEW> to add a new archive set.

Specifying Baskets and Cartridges

You select the baskets to archive from the Application, Database, Basket drop down boxes and designate the cartridge to archive to. If you want to manage the cartridges yourself then uncheck the Auto-rotate cartridges check box. If you want the Auto Archive process to automatically rotate and name cartridges, then check this box. You will see that other screen options change depending on this option. The selection of Baskets to Archive and Cartridges to Archive To works the same as auto archive for halFILE 1.4SQL when the Auto-rotate option is unchecked. In this case, you then select the cartridges to archive to.

To take advantage of the new feature for cartridge rotation and the elimination of stage drives, the Auto-rotate option must be selected. This opens up to frames at the bottom of the screen called **Auto-rotate Settings** and **Rotation defaults**. You can toggle between these screens using the button on the frame.

Auto-Rotate Settings

This frame tells the system how the auto rotation of cartridges is managed for the current archive set. **Cart Name Mask** - tells the system how cartridges are named. Use the # to designate the placeholder for a digit or cartridge number.

Current Cart Num - designates the current cartridge number being used. So, if Current Cart Num is 15 and Cart Name Mask is CD## then the current cartridge name would be CD15.

Size Limit (in MB) - defines how much space the cartridge can use. So, if you want to make a backup of the archived images to CD, set this parameter to 628. When 628 Megabytes are archived to the cartridge, the cartridge will be closed and a new cartridge will be opened. The administrator can then make a CD backup of the cartridge folder.

Drive for Cartridges - designates the Archive Drive where the cartridges are built and images are stored. This is typically a high capacity magnetic drive and is configured in the halFILE Administrator under the Configure-Drives menu selection.

The **Save DB Information** check boxes tell the system whether or not to save database information for all images on the cartridge to the cartridge. This facilitates disaster recovery by creating ASCII files containing database information that can be used to reload the halFILE database.

Log System Messages check boxes enable/disable to logging of archive activity. This is used for technical support purposes.

Rotation Defaults

From the Auto-Rotate Settings frame, you can click the Set System Defaults button to show the Rotation Defaults frame. This frame contains the global system defaults used for all archive sets and how new cartridges are created and named.

Cart Name Mask – this field defines how new cartridges are named. Use the %appl% to substitute the Application ID and %doctype% to substitute the Document Type. Also, use # to designate the cartridge number, including as many digit placeholders as the maximum cartridge number will be. For example, if your Application ID was XXX and your Document Type ID was TP and the mask was %appl%%doctype%###, then the first cartridge created would be named XXXTP001.

Cart Prefix – this designates what to post to the Cartridge Prefix field in the Cartridges table.

Cart Description – this designates what to post to the Cartridge Description field in the Cartridges table. Again, you can use the %appl%, %doctype% and ### substitution values.

Size limit (in MB) – designates what to post to the MB Limit field in the Cartridges table.

Cart Type – specifies what to post to the Cartridge Type field in the Cartridges table.

Drive – selects the Archive Drive to be used to initialize the cartridge.

Save DB Informaiton – check the On box to save database information for all archived images to the cartridge.

Log System Messages – check the On box to create a log of the actions performed by Auto Archive. This is used for technical support purposes.

Low Disk Notify (in MB) – this will send a notification when the free space on the current cartridge reaches this capacity. The notification is sent via e-mail and through System messages. (see Alerts section below).

Alerts

Auto Archive always sends system messages to the configured Administrator through halFILE 2.0 new System messages feature. If the Alert frame is filled with e-mail information then a e-mail is sent to the appropriate party. E-mail and system messages include notifications that a cartridge is full, error messages and archive statistics.

Running the Program Interactively

To run the archive routine, the command line is:

HFArchive32 Auto<n>

Where <n> is the number of the archive set. Archive Auto1 will run archive set #1. For each basket being archived, the screen showing its progress will display. Once the basket is complete, it will disappear as the program prepares to archive the next basket in the archive set. If there are lots of documents in the basket, the screen may disappear for some time while the program calculates the size of files to be archived.

Running the Program using NT Scheduler

The program can be set up as a scheduled NT task using the same command line as above. You can set up multiple tasks to run different archive sets.

Reviewing Auto Archive Results

The program creates an autoarchauto<n>.log file each time it runs (where <n> is the archive set number). You can review this log to see if archive completed normally. You should also review baskets using Tools | Basket Status as well as search for archived documents to ensure that documents are being properly archived.