

Content Server - System Migration Guide
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INTRODUCTION

This chapter discusses the structure of the documentation and the support options available to you. It covers the following topics:

- ❖ [About This Guide](#) (page 1-1)

ABOUT THIS GUIDE

This guide provides conceptual, reference, and step-by-step information for the tasks needed to migrate both the content and structure of one Content Server to another.

The following subjects are discussed in this section:

- ❖ [Audience](#) (page 1-1)
- ❖ [Conventions](#) (page 1-1)

Audience

This guide is intended for people who administer Content Server, including developers and administrators.





Conventions

- ❖ The notation `<install_dir>/` is used to refer to the location on your system where Content Server is installed.

- ❖ Forward slashes (/) are used to separate directory levels in a path name. This is true when referring to files on a Windows file system or on a UNIX system. A forward slash will always appear after the end of a directory name.

Symbols

The following symbols are used throughout this document:

Symbols	Description
	This is a note. It is used to bring special attention to information.
	This is a technical tip. It is used to identify information that can be used to make your tasks easier.
	This is an important notice. It is used to identify a required step or required information.
	This is a caution. It is used to identify information that might cause loss of data or serious system problems.

ARCHIVING OVERVIEW

Several different tools are available to archive Content Server structure, content and folders. Each tool serves a different purpose and they can all be used together. This chapter provides an overview of these tools and their uses. The remainder of this document provides a detailed discussion about using the Configuration Migration Utility and the Archiver.

The following topics are discussed:

- ❖ [Configuration Migration Overview](#) (page 2-1)
- ❖ [Archiver Overview](#) (page 2-2)
- ❖ [Folder Archiving](#) (page 2-4)
- ❖ [FolderStructureArchive Component](#) (page 2-7)
- ❖ [Archive Tool Summary and Comparison](#) (page 2-9)
- ❖ [Running Stand-Alone Applications](#) (page 2-11)

CONFIGURATION MIGRATION OVERVIEW

The Configuration Migration Utility is used to select elements of your Content Server instance to migrate to another instance.

You can select individual elements (such as workflow tokens or content types) or entire sections (such as all user-related metadata or all metadata related to workflows). In addition, you can export and import an entire content server in order to create a snapshot of the content server at a certain point in time. It can be used to migrate a system from testing to production, or to provide an upgrade path from versions of the content server. By

using the migration tool, you can keep an older version of the Content Server in production while testing new functionality on a newer version.

Each export configuration is packaged as a *bundle* which contains the information needed to re-create the configuration on another system. A bundle is a zip file that can be easily shared with other systems.

Migration Functions

The Migration Utility is an add-on component used to configure migration bundles for exporting to other systems. It is also used to upload and import bundles on an importing system. There are four main functions:

- ❖ **Upload Bundle:** used to find a copy of an exported bundle and make it available for use on a receiving system.
- ❖ **Configuration Bundles:** used to import the configuration from the uploaded bundle. This function creates new metadata fields or overwrites current fields, depending on options chosen during import.
- ❖ **Configuration Templates:** used to create *export bundles*, which can later be uploaded and imported to another content server.
- ❖ **Recent Actions:** used to view recent activity such as imports and exports and to view a log of those activities.

By using the Migration Utility with the Archiver, you can create a snapshot in time of your existing content server or you can use it to keep track of incremental updates to an existing system. The Migration Utility captures configuration information while the Archiver captures content.

See [Chapter 3 \(Migrating System Configurations\)](#) for details about using the Configuration Migration Utility.

ARCHIVER OVERVIEW

The archiver can be used in conjunction with the migration utility in order to migrate a complete content server, including content, from one system to another. The archiver can be run as an Admin Applet, accessed from the Admin menu, or as a stand-alone version. The stand-alone version is required to:

- ❖ Create collections.

- ❖ Create a new archive by copying from an existing archive.
- ❖ Browse the local file system to connect to new collections.

See [Running Stand-Alone Applications](#) (page 2-11) for details about using Archiver in stand-alone mode.

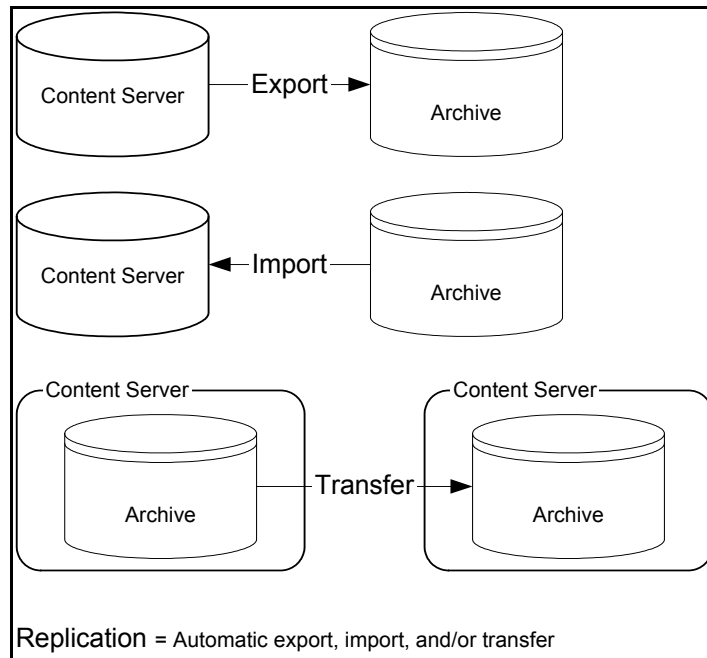
Archiver Functions

Archiver is a Java applet that is used to transfer and reorganize content server files and information. Archiver has four main functions:

- ❖ **Export**—Used to copy native and web-viewable files out of the content server instance for backup, storage, or import to another content server instance. You can also export content types and user attributes. You export to an *archive*, which contains the exported files and their metadata in the form of *batch files*.
- ❖ **Import**—Used to retrieve files and content server information from an exported archive. Importing is typically used to get a copy of content from another content server or to restore data that has been in storage. You can also change metadata values during an import.
- ❖ **Transfer**—Used to transfer content from one content server instance to another over sockets. This is typically used to move or copy content across a firewall or between two content server systems that do not have access to the same file system. You can also use the Transfer function to transfer archive files between content server systems that have access to the same file system.
- ❖ **Replicate**—Used to automate the export, import, and transfer functions. For example, you can use replication to automatically export from one content server instance, transfer the archive to another computer, and import to another content server instance.

The following illustration demonstrates these basic functions.

Figure 2-1 Archiver functions



See Also

- [Chapter 4 \(Archives, Collections and Batch Files\)](#)
- [Chapter 5 \(Exporting Data in Archives\)](#)
- [Chapter 6 \(Importing Data\)](#)
- [Chapter 7 \(Transferring Files\)](#)
- [Chapter 8 \(Replicating Files\)](#)



Caution: Do not use Archiver as your primary method of disaster recovery; use standard backup systems for the database and file system.

FOLDER ARCHIVING

You cannot use the Archiver to move folder structure and content but you can use Folder Archiving to migrate the folder structure of your Content Server from one location to another. This will migrate the total folder structure from one location to another. This does not archive the folder content, just the folder structure.

Using Folder Archiving you can export and import the folder hierarchical structure directly from the Folders administration interface. The folder hierarchy is exported to a text file in HDA format, which can then be read by the Content Server when it is imported.

Folder Archive Functions

The Folder Archive is part of the Folders component and has the following functionality:

- ❖ **Export a folder hierarchy:** Used to assign a filename to an exported archive file and save it in a specified location.
- ❖ **Import folder hierarchy:** Used to specify the filename of an archive to import. The imported folder structure removes all current folders and replaces them with the folder hierarchy.

The Virtual Folder Administration Configuration page is used to export and import folder archives.

Figure 2-2 Virtual Folder Admin Configuration page

Virtual Folder Administration Configuration

Specify basic behavior associated with user interaction.

Maximum Folders Per Virtual Folder:

Maximum Content Per Virtual Folder:

[System Folder Configuration](#)
[System Default Information Field Configuration](#)
[Local Folders](#)
[Information Field Inherit Configuration](#)

To export a folder hierarchy as an archive, use the following procedure:

1. Log in to the content server as an administrator.
2. Open the **Administration** tray.
3. Click the **Folder Configuration** link.
4. Click **Export Archive**.

A File Download window is displayed.

5. Click **Save**.

A Save As window is displayed.

6. Navigate to the directory where you want to save the folder archive file.
7. Specify a new file name so that you can easily identify the archive file (for example, *041127_CollectionArchive*).
8. Click **Save**.

The folder hierarchy is exported to the specified file.



Note: Depending on the size of the folder hierarchy that is being exported as an archive file, the default heap size value for the JVM may not be adequate. If memory errors are issued during the export procedure, the heap size may need to be increased. For more detailed information about JVM heap size issues, see the Archiver chapter in the *Content Server Troubleshooting Guide*.

Use the following procedure to import an archived folder structure:



Caution: This procedure removes all current folders and replaces them with the imported folder hierarchy. Typically, you should perform this procedure only on a content server that has no content items in the repository.

1. Log in to the content server as an administrator.
2. Open the **Administration** tray.
3. Click the **Folder Configuration** link.
4. Click **Browse** and navigate to the archive file you want to import.
5. Click **Open**.

The path and file name appear in the field.

6. Click **Import Archive**.

A confirmation prompt is displayed.

7. Click **OK**.

The archived folder is imported and recreated.

See the *Folders and WebDAV Administration Guide* for details about exporting and importing folders.

FOLDERSTRUCTUREARCHIVE COMPONENT

The Folder Structure Archive component is a separate product from the Folders component and must be installed separately. This component can be used with the archiving aspect of the Folders component but its functionality differs in several ways:

- ❖ It can export selected portions of the folder structure. The Folders Archive function can only export the entire folder structure.
- ❖ It can create incremental archives. These are archives that contain only changed folders. The built-in Folder Archive function creates archives that contain all items.
- ❖ It can include both the folder structure and folder content in the archives. The Folder Archive function can only export the folder structure and none of the content.


FolderStructureArchive Functions

This component can be used for three major purposes:

- ❖ **As a backup tool.** With this component you can copy the folder structure, including its content.
- ❖ **As a duplication tool.** This component can be used to copy the folder structure and content and create an exact copy on another computer, helping to simplify multiserver setups.
- ❖ **As a synchronization tool.** With this component you can make sure that copies of your folders and their contents are kept synchronized across different systems.

The Folder Archive Configuration page is used to set up the archive.

Figure 2-3 Folder Archive Configuration page



The screenshot displays the 'Folder Archive Configuration' interface. At the top, there is a 'Collection Name' dropdown menu with 'idcm1' selected. Below it is an 'Archive Name' text input field. A shaded area contains a folder tree structure with two items: 'Contribution Folders' and 'Trash', each with a checkbox. At the bottom of the shaded area are two buttons: 'Add' and 'Remove'.

To create a new folder structure archive, complete the following steps:

1. Log into the content server as an administrator.
2. Go to the Administration page of the content server, and click **Folder Archive Configuration**.

The Folder Archive Configuration page is displayed.

3. In the **Collection Name** dropdown list, select the archive collection that the new folder structure archive should be part of.
4. In the **Archive Name** field, specify the name of the new folder structure archive.



Important: Make sure that you provide an archive name *before* selecting folders to be included in the archive. If you select folders first and then specify an archive name, nothing happens when you click **Add**. (The folder tree collapses completely and your folder selection is lost).

5. In the shaded area, select all folders that you want to include in the folder structure archive.

If you click the check box of a parent folder, all its child folders are selected automatically as well. You can also select and unselect any of the child folders individually. A parent folder will only be selected if *all* of its subfolders are selected as well. If you unselect any of the child folders, its parent folder is automatically unselected, too. This does not affect the virtual folder path properties of the child folder.

6. Click **Add**.

A message is displayed saying that the folder archive was added successfully. The archive is now included in the **Archive Name** dropdown list, and also in the list of

current archives for the content server instance in the Archiver utility. All normal Archiver functions can be used with this new folder archive.

See the *Folder Structure Archive Administration Guide* for details about using this component.

ARCHIVE TOOL SUMMARY AND COMPARISON

The four tools that can be used to archive structure, content, and folders all serve different purposes. All of the tools can be used together, but sometimes one might be preferred over the other. The following table summarizes each tool and its strengths and limitations.

	Configuration Migration Utility (CMU)	Archiver	Folder Archiving	Folder Structure Archive Component
Primary purpose	A 'snapshot' tool, used to migrate one Content Server to another or to migrate to an upgraded instance	Primarily used for backup, storage, and transfer of data over sockets	Used to export and import a complete folder structure or hierarchy	Used to backup and duplicate a folder structure to synchronize the contents with another Content Server
Strengths	Allows you to choose specific parts of the Content Server to migrate Provides logging and trace files	Works with older content Provides logging and trace files	Ensures that the collection IDs on the target match those on the source	Can export selected portions of the folder structure.

	Configuration Migration Utility (CMU)	Archiver	Folder Archiving	Folder Structure Archive Component
Limitations	<p>Cannot be used on pre-6.2 versions of Content Server.</p> <p>Migration of components can be difficult.</p>	<p>The stand-alone version is needed to create collections.</p> <p>Imported revisions don't automatically enter a workflow.</p>	<p>All current folders and content items are removed from the Content Server and replaced by the imported folder hierarchy.</p>	<p>Does not ensure that the collection ID of folders on the target match those on the source content.</p>
What it archives	<ul style="list-style-type: none"> ❖ Metadata ❖ Security (roles and accounts) ❖ Profiles ❖ Schema ❖ Workflow ❖ Personalization ❖ Add-on components 	<ul style="list-style-type: none"> ❖ Content ❖ Content types ❖ User attributes ❖ Subscriptions ❖ Security groups ❖ File Formats 	<ul style="list-style-type: none"> ❖ Complete folder hierarchy (no content) 	<ul style="list-style-type: none"> ❖ Complete or partial folder hierarchy and content ❖ Only changed content (if desired)
What it doesn't archive	<ul style="list-style-type: none"> ❖ Content ❖ Publisher projects ❖ Workflow state ❖ Does not synchronize: this is an additive archive 	<ul style="list-style-type: none"> ❖ Folder structure ❖ Metadata, security and other features which are archived by CMU ❖ Weblayout structure 	<ul style="list-style-type: none"> ❖ Partial or selected folder hierarchy ❖ Collaboration folders ❖ Content ❖ Metadata, security (other features which are archived by CMU) 	<p>Collaboration folders</p>

RUNNING STAND-ALONE APPLICATIONS

The following information details how to run a stand-alone application. This is required when using the Archiver to create collections.

For more details, see the *Content Server System Administration Guide*.

Windows

To run a stand-alone administration application on a Windows operating system:

1. Select the application from the Windows Start menu:
 - Select **Start—Programs—Content Server—*instance*—*application***.



Tech Tip: It may take several seconds for the login screen or the application screen to appear, and the screen may be hidden by other windows.

2. Enter the administrator login name and password.
3. Click **OK**.

The main screen of the application is displayed.

UNIX

To run a stand-alone administration application on a UNIX operating system:

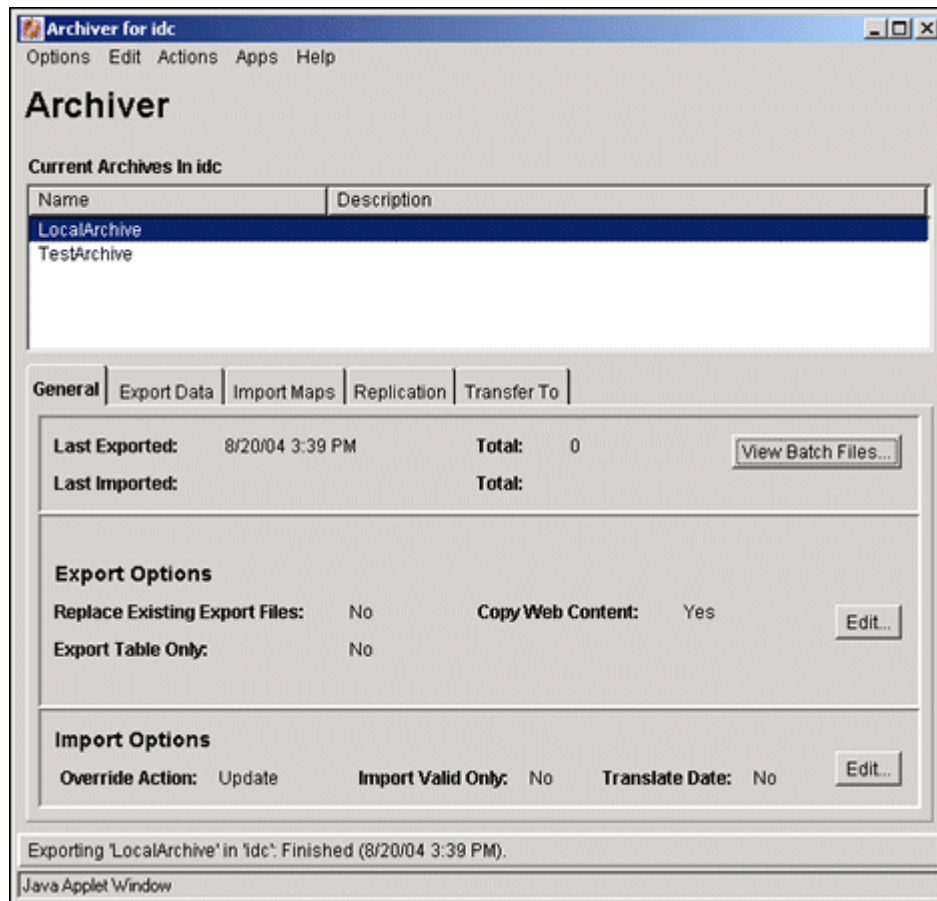
1. Navigate to the `<install_dir>/bin/` directory.
2. Enter `/archive`
3. Press **Enter**.
4. Enter the administrator login name and password.
5. Click **OK**.

The main screen of the application is displayed.

The Main Archiver Screen

This screen is accessed either in stand-alone mode or via the Admin Applets menu.

Figure 2-4 Main Archiver screen



Feature	Description
Options menu	<p>Open Archive Collection—Used to open collections.</p> <p>View Automation For <i>instance</i>—used to display and remove archives that are exported, imported, or transferred automatically. See Chapter 8 (Replicating Files) for details.</p> <p>Tracing—Displays the Tracing Configuration menu. These trace reports are available from the System Audit Information page. See the <i>Content Server Troubleshooting Guide</i> for details about the tracing reports.</p>
Edit menu	<p>Add—Displays the Add Archive Screen (page 4-18).</p> <p>Delete—Deletes the selected archive.</p>
Actions menu	<p>Export—Used to initiate an export or to delete revisions. If automated export is enabled, this option is unavailable.</p> <p>Import—Used to initiate an import and specify what data to import.</p> <p>Transfer—Manually transfers the selected archive to a target archive. If a target archive is not specified or if automated transfer out of an archive is enabled, this option is unavailable.</p> <p>Cancel—Cancels any active archiving process for the selected archive.</p>
Apps menu	Used to open other administration applications. The other applications open in the same mode (applet or stand-alone) as the current application.
Help menu	<p>Contents—Displays the content server online help.</p> <p>About Content Server—Displays version, build, and copyright information for the content server.</p>
Current Archives list	Lists the archives in the open collection.
General tab	Used to view archiving activity and set some export and import options.

Feature	Description
Export Data Tab	Used to configure exports. See Chapter 5 (Exporting Data in Archives) for details.
Import Maps Tab	Used to configure imports. See Chapter 6 (Importing Data) for details.
Replication Tab	Used to configure replication. See Chapter 8 (Replicating Files) for details.
Transfer To Tab	Used to configure transfers. See Chapter 7 (Transferring Files) for details.
Status bar	Displays the status of the Archiver or the active archiving process.

MIGRATING SYSTEM CONFIGURATIONS

OVERVIEW

Configuration migration is used with the Archiver to export one content server to another. Archiver is used to migrate content and the Configuration Migration Utility exports the configuration and customizations of the content server.

This chapter covers the following topics:

Concepts

- ❖ [Configuration Migration Utility Details](#) (page 3-2)
- ❖ [About Migration Templates and Bundles](#) (page 3-5)
- ❖ [Migration Tips](#) (page 3-5)
- ❖ [Managing Configuration Migration](#) (page 3-7)

Tasks

- ❖ [Creating a Configuration Migration Template](#) (page 3-7)
- ❖ [Editing a Configuration Template](#) (page 3-9)
- ❖ [Importing a Template](#) (page 3-10)
- ❖ [Creating a One-Time Export](#) (page 3-10)
- ❖ [Exporting a Configuration](#) (page 3-11)

- ❖ [Uploading a Bundle](#) (page 3-12)
- ❖ [Importing a Bundle](#) (page 3-13)
- ❖ [Downloading a Bundle](#) (page 3-14)
- ❖ [Viewing Status Information](#) (page 3-14)

Interface

- ❖ [Migration Options](#) (page 3-15)
- ❖ [Upload Configuration Bundle Screen](#) (page 3-16)
- ❖ [Configuration Bundles Page](#) (page 3-16)
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- ❖ [Status Detail Report](#) (page 3-27)

CONFIGURATION MIGRATION UTILITY DETAILS

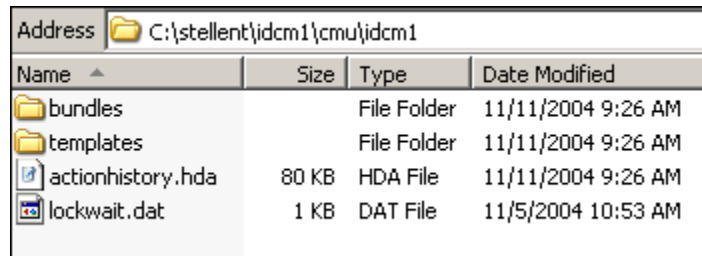
This section describes the structure of the Configuration Migration Utility and how it uses templates and bundles. For an overview of this utility and how it compares to other archiving tools, see [Chapter 2 \(Archiving Overview\)](#).

Migration Structure

A bundle is a set of configuration information that is packaged into a single zipped file and made ready for exporting to another content server.

Information is stored in the `<install_dir>/cmu/instance/` directory.

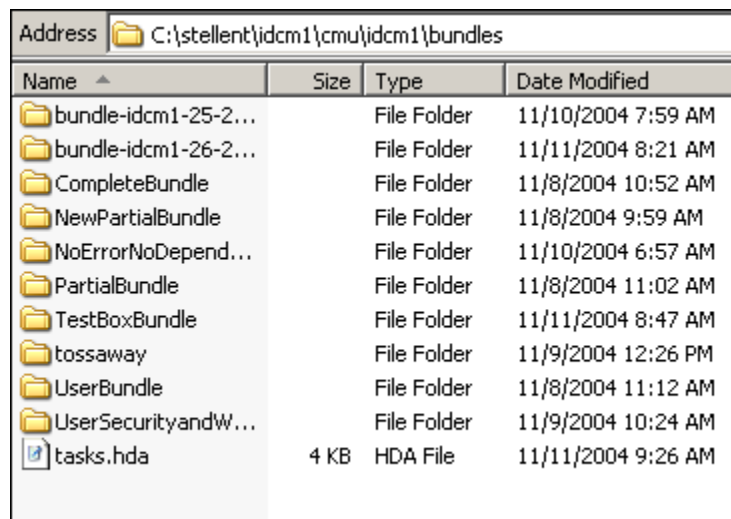
Figure 3-5 Migration directory structure



Name	Size	Type	Date Modified
bundles		File Folder	11/11/2004 9:26 AM
templates		File Folder	11/11/2004 9:26 AM
actionhistory.hda	80 KB	HDA File	11/11/2004 9:26 AM
lockwait.dat	1 KB	DAT File	11/5/2004 10:53 AM

The bundles subdirectory contains specific bundles and associated information. The templates subdirectory contains configuration templates which can be used for new export files.









Figure 3-6 The bundles subdirectory



Name	Size	Type	Date Modified
bundle-idcm1-25-2...		File Folder	11/10/2004 7:59 AM
bundle-idcm1-26-2...		File Folder	11/11/2004 8:21 AM
CompleteBundle		File Folder	11/8/2004 10:52 AM
NewPartialBundle		File Folder	11/8/2004 9:59 AM
NoErrorNoDepend...		File Folder	11/10/2004 6:57 AM
PartialBundle		File Folder	11/8/2004 11:02 AM
TextBoxBundle		File Folder	11/11/2004 8:47 AM
tossaway		File Folder	11/9/2004 12:26 PM
UserBundle		File Folder	11/8/2004 11:12 AM
UserSecurityandW...		File Folder	11/9/2004 10:24 AM
tasks.hda	4 KB	HDA File	11/11/2004 9:26 AM






Each configuration bundle is in a separate subdirectory and contains all the relevant files needed to export that bundle.

Figure 3-7 Files in configuration bundle

Address  C:\stellent\jdcml\cmu\jdcml\bundles\UserBundle			
Name ^	Size	Type	Date Modified
 usermetadef		File Folder	11/8/2004 11:12 AM
 aliases.hda	1 KB	HDA File	11/10/2004 7:32 AM
 manifest.hda	3 KB	HDA File	11/10/2004 7:32 AM
 roles.hda	4 KB	HDA File	11/10/2004 7:32 AM
 task.hda	4 KB	HDA File	11/10/2004 7:32 AM
 UserBundle.zip	6 KB	WinZip File	11/9/2004 1:30 PM
 usermetadef.hda	1 KB	HDA File	11/10/2004 7:32 AM

Within the specific directories, any customizations that are unique to the instance in that export (such as customized metadata fields, schemas, and so on) are included in a separate subdirectory.

Figure 3-8 Customizations stored in directory

Address  C:\stellent\jdcml\cmu\jdcml\bundles\UserBundle\usermetadef			
Name ^	Size	Type	Date Modified
 usermetadef_dEmail.hda	1 KB	HDA File	11/10/2004 7:32 AM
 usermetadef_dFullName.hda	1 KB	HDA File	11/10/2004 7:32 AM
 usermetadef_dUserLocale.hda	1 KB	HDA File	11/10/2004 7:32 AM
 usermetadef_dUserType.hda	1 KB	HDA File	11/10/2004 7:32 AM

The following files are included in these different subdirectories:

File or Directory	Description
bundle directory	Each bundle has a subdirectory in the /bundles directory. The subdirectory is given the name assigned to the bundle when the configuration export was created.
templates directory	Contains export rules created from bundles. When a configuration export is created and saved, a name is given to that export and the configuration is stored as a template in the templates directory

File or Directory	Description
<i>hda</i> files	Contains definitions and details of customizations and other elements of the exported instance. Depending on how the export was defined, information can be bundled into one .hda file or into several.

About Migration Templates and Bundles

A migration *template* is a set of configuration options which specify what content server items will be exported. For example, a template named *FullCSEExport* may contain all content server items (schema, custom metadata, workflows, and so on). Another template named *UserCSEExport* may only contain options that pertain directly to users (security groups, roles, and so on).

These templates are used to create configuration *bundles*. A bundle uses the template to determine what to export and to create the necessary definition files which will be exported with the content server items. The bundle name is used to identify the finished result of an import or an export. The bundled information is put into a zipped file, containing all the necessary definition files.

MIGRATION TIPS

It is important to remember that migration entails the bundling and copying of information *about* the content server instance. It does not include any of the actual content that is in the content server. Archiver is used to export content. You should take care that if you archive specific content and plan to export it to another system, the metadata information for that content is also migrated using the Configuration Migration Utility.

When migrating information from one content server to another, there is not a merging of information. **Migration is an additive process.** The exporting configuration bundle of metadata information is added to the metadata that currently exists in the importing content server. If metadata information currently exists that matches the metadata being imported, and if the Force Overwrite rule has been selected during import, then duplicate bundles are replaced. See [Uploading a Bundle](#) (page 3-12) for information about the Force Overwrite option.

You cannot import a configuration on a 6.2 version of the Content Server. The Edit, Preview, and History options will not appear on the bundle's options on the Configuration Bundles page on a 6.2 Content Server.

If you import a template to use on another content server and if the importing system doesn't have the same metadata fields, you will not be able to use that template for export later. You must upload the template, import the configuration, and then use it for exporting. See [Importing a Template](#) (page 3-10) for details about the import process.

Limitations

Keep the following limitations in mind when using the Configuration Migration Utility:

- ❖ When exporting workflow configuration information, only the workflow definition is exported. The state of the workflow is not exported.
- ❖ If importing and overwriting existing workflows, make sure that you have the same step names for each workflow.
- ❖ If you import a workflow to a new content server, the workflow will not retain the same state information as that of the exporting content server. For this reason, you should not plan to export active workflows.
- ❖ This utility is not a cloner. It does not synchronize information with another system, it only copies and moves information.
- ❖ This utility cannot be set up to migrate automatically.
- ❖ Errors may arise when migrating docmeta information from earlier versions of the content server due to the use of schemas in later versions of the content server.
- ❖ You cannot import users from a 6.2 or 7.0 version of the system to a later version due to Archiver limitations.
- ❖ Migrating the config.cfg file may have errors because some values are not migrated for safety reasons (for example, IDC_Name). Others values, such as that for AutoNumberPrefix, are migrated.
- ❖ Migrating components can be difficult because no preference prompts (for example, in Folders or RMA) and no database tables can be migrated.
- ❖ No support is provided for Publisher projects or for bundles in components.

Migration Logs

You can enable migration trace logs in order to track activity during migration events. The logs are enabled by clicking **System Audit Information** on the Admin Applets screen or under the Administration tray. In the Tracing Section Information portion of the page, select **cmu** from the Active Sections menu. Configuration Migration Utility logs will be included in the trace files that are run.

To access the logs, click **View Server Output** from the Actions menu on the page. The Configuration Migration Utility log information is included with other tracing logs that are generated.

MANAGING CONFIGURATION MIGRATION

Migration consists of several tasks such as creating migration templates, creating migration bundles, and exporting or importing the configuration. This section describes these tasks:

- ❖ [Creating a Configuration Migration Template](#) (page 3-7)
- ❖ [Editing a Configuration Template](#) (page 3-9)
- ❖ [Importing a Template](#) (page 3-10)
- ❖ [Creating a One-Time Export](#) (page 3-10)
- ❖ [Exporting a Configuration](#) (page 3-11)
- ❖ [Uploading a Bundle](#) (page 3-12)
- ❖ [Importing a Bundle](#) (page 3-13)
- ❖ [Downloading a Bundle](#) (page 3-14)
- ❖ [Viewing Status Information](#) (page 3-14)

Creating a Configuration Migration Template

1. Select the **Configuration Templates** option from the [Migration Options](#) (page 3-15) or from the top menu on any Migration screen.
2. Select **Create New Template** from the page Actions menu on the [Configuration Templates Page](#) (page 3-18).

The [Configuration Migration Admin Screen](#) (page 3-19) is displayed.

3. Choose the Action Options for the export.
 - To create an export template that will continue the export process even if an error is encountered, select **Continue on Error**. The export will proceed but errors will be reported on the [Status Detail Report](#) (page 3-27).
 - To have email sent to the person initiating the export, select **Email Results**. Email will be sent to the person who performs the export, not the person who created the export template.
 - To have known dependencies added to the export or import bundle, leave the **Add Dependencies** option selected. If this is unselected, dependencies are checked and noted with an error flag in the log file but the bundle action continues.
 - To ignore all dependencies during export or import, select **Ignore Dependencies**. Ignoring dependencies may avoid errors during the export process, but may cause errors when an import is done. If you are certain that all the necessary fields are present in the content server, you can uncheck **Add Dependencies** and check **Ignore Dependencies** to import a field without dependencies being added.
4. You can create a custom name for this bundle. Custom names should be used sparingly to avoid possible name collisions. If a custom name is not selected, the system creates a name based on the bundle name given when you save the template. Custom names cannot contain spaces or special characters (#, \$, % and so on).
5. Choose the Content Server Sections to be included from the [Content Server Sections](#) (page 3-23) portion of the screen.
 - To use all sections, click **Select All** on the page Action menu.



Note: Some Content Server sections are not displayed; not all are supported on all versions of the Content Server and some cannot be safely migrated.

- To use only specific content server items, click **Content Server Sections** then click the individual section name that you want to include. To include all items in that section, click **Select All** from the page Action menu. To use only a subset, select the individual items by putting a check in the selection box on the item's row. Some sections may have action options that are specific to that section. Select the option for the section by checking the selection box.



Tech Tip: If you want to use the majority of the metadata, use the **Select All** menu option. Then click on the individual sections that you do not want to use.

6. Preview the selections you made by clicking **Preview** from the page Actions menu. The [Preview Screen](#) (page 3-24) is displayed.

7. Continue editing and adding selections by clicking **Edit** from the page Actions menu. Click **Preview** to view your changes.
8. When the template is complete, click **Save** from the page Actions menu. **If you do not elect to save the template, your configuration changes will be lost.**

The [Edit Export Rule Screen](#) (page 3-25) is displayed.

9. Enter a name for the template. Names cannot contain spaces or special characters (#, \$, %, and so on). A name can include details of the date of the export (for example, *Nov10FullExport*) or describe the contents (*FullExportNoDependencies*) or can be meaningful in any way that is appropriate for your use. Click **Save** when finished entering the name.
10. The [Configuration Migration Admin Screen](#) (page 3-19) is re-displayed.
 - To create another template using the current template, select **Save As** from the page Actions menu. The [Edit Export Rule Screen](#) (page 3-25) is displayed again where you can create a new name.
 - To alter the selections for exporting, make any changes then select **Save** from the page Actions menu to change the selections and retain the name entered in step 9 or **Save As** from the page Actions menu to give it a new name on the [Edit Export Rule Screen](#) (page 3-25).
 - To export the configuration, select **Export** from the page Actions menu. See [Exporting a Configuration](#) (page 3-11) for details.

After creating the configuration, you can export it and create a bundle for use on another system. See [Exporting a Configuration](#) (page 3-11) for details.

Editing a Configuration Template

1. First choose a template to be edited. Use one of the following methods to choose a template from the [Configuration Templates Page](#) (page 3-18):
 - Click on the template name.
 - Select **Edit** from the individual template Actions menu.

The [Configuration Migration Admin Screen](#) (page 3-19) is displayed.

2. Follow the steps detailed in [Creating a Configuration Migration Template](#) (page 3-7) to select the items you want in the revised template:
 - Choose the Action Options for the template.

- Choose the Content Server Sections to be included from the [Content Server Sections](#) (page 3-23) portion of the screen.
3. Preview the selections you made by clicking **Preview** from the page Actions menu. The [Preview Screen](#) (page 3-24) is displayed.
 4. Continue editing and adding selections by clicking **Edit** from the page Actions menu. Click **Preview** to view your selections.
 5. When the template is complete, click **Save** from the page Actions menu to save the template under its current name or **Save As** to give it a new name. **If you do not elect to save the template, your configuration changes will be lost.**

The [Edit Export Rule Screen](#) (page 3-25) is displayed where you can enter a new template name.

Importing a Template

Follow these steps to import a template from another system for use on the current instance.

1. Select **Upload Bundle** from the [Migration Options](#) (page 3-15) or from the top menu of any Migration screen.

The [Upload Configuration Bundle Screen](#) (page 3-16) is displayed.

2. Use the Browse button to find the bundle that contains the template you want to use.
3. Select **Create Export Template**.
4. Click **Upload**.

The bundle appears on the [Configuration Bundles Page](#) (page 3-16). To use the template associated with that bundle, see [Editing a Configuration Template](#) (page 3-9).

If you import a template to use for exporting and if the importing system does not have the same metadata fields, you must upload the template, import the configuration then use it for exporting. You cannot use the template for exporting unless the metadata fields are in place on the system that imported the template.

Creating a One-Time Export

Follow these steps to create an export template and immediately export the content server configuration.

1. Select the **Configuration Templates** option from the [Migration Options](#) (page 3-15) or from the menus at the top of any Migration screen.
2. Select **Create New Template** from the page Actions menu on the [Configuration Templates Page](#) (page 3-18).
The [Configuration Migration Admin Screen](#) (page 3-19) is displayed.
3. Follow the steps detailed in [Creating a Configuration Migration Template](#) (page 3-7) to select the items you want in the configuration:
 - Choose the Action Options.
 - Choose the Content Server Sections to be included from the [Content Server Sections](#) (page 3-23) portion of the screen.
4. Preview the selections you made by clicking **Preview** from the page Actions menu. The [Preview Screen](#) (page 3-24) is displayed.
5. Continue editing and adding selections by clicking **Edit** from the page Actions menu. Click **Preview** to view your changes.
6. When the template is complete, click **Export** from the page Actions menu. The configuration is immediately exported and the name of the exported bundle appears in the [Recent Actions Screen](#) (page 3-26) with a unique identifier similar to the following:

```
bundle-idcm1-25-20041110T135912
```

The initial portion of the name (bundle-idcm1) indicates the default bundle name (bundle) and the instance name (idcm). The next portion indicates the sequence number (25). The date follows (20041110 for November 11, 2004). Finally a unique control number is used to identify the exported bundle.

Exporting a Configuration

1. Use one of the following methods to choose an export configuration template from the [Configuration Templates Page](#) (page 3-18).
 - Click on the configuration name.
 - Select **Preview** from the individual Actions menu if you want to view the items that will be exported.
The [Preview Screen](#) (page 3-24) is displayed.
2. Select **Export** from the page Actions menu. If you select **Export** without previewing the bundle first, you are prompted to confirm that you want to perform the export.

The [Recent Actions Screen](#) (page 3-26) is displayed.

3. This screen refreshes automatically to show the most recent activities and their status.

To view details of the migration action, click the message in the Status column. See [Viewing Status Information](#) (page 3-14) for more details.

After exporting, the bundle name appears on the Configuration Bundles page, indicating that it has been bundled. A date and time indicator is appended to the configuration name, as in the following example:

```
Nov23Bundle-idcm-1-20041123T122436
```

The initial portion of the name is the original bundle name. The instance name follows (idcm), followed by the date (20041123 for November 23, 2004) and the time (122436 to indicate 12:24:36). From this Import page, you can download the bundle to a new location so it can be uploaded onto another system.

The original template name (Nov23Bundle) continues to appear on the Configuration Templates page, where it can be re-exported at another time.

Uploading a Bundle



Tech Tip: If you are uncertain about the contents of a bundle, it is always safe to upload the bundle and preview the configuration contents. The bundle configuration is not applied to the importing system until you choose to import it.

Before a configuration can be imported it must be first uploaded. Follow these steps to upload a bundle from another content server:

1. Select **Upload Bundle** from the [Migration Options](#) (page 3-15) or from the top menu of any Migration screen.

The [Upload Configuration Bundle Screen](#) (page 3-16) is displayed.

2. Use the Browse button to find and select the zipped bundle file you want to use.
3. If you want to use the template included with the bundle, select the **Create Export Template** checkbox.
4. If you want the new bundle information to overwrite existing content server configuration information, select the **Force Overwrite** checkbox.
5. Click **Upload** to load the bundle.

Importing a Bundle

After a bundle is uploaded and resides on the importing system, it can be imported for use. Follow these steps to import the bundle:

1. Select **Configuration Bundles** from the [Migration Options](#) (page 3-15) or from the top menu of any Migration screen.

The [Configuration Bundles Page](#) (page 3-16) is displayed.

2. Click on the name of the bundle you want to import.

The [Configuration Migration Admin Screen](#) (page 3-19) is displayed with **Overwrite Duplicates** in place of the Custom Name field. Selecting this field will permit the importing bundle to overwrite any duplicate fields. If not selected, the import will error on duplicates and stop. It will continue if **Continue on Error** was checked but a status of **fail** appears on the [Recent Actions Screen](#) (page 3-26).

3. Select an action from the page Actions menu:

- To preview the import configuration, click **Preview**. The [Preview Screen](#) (page 3-24) is displayed where you can either select **Edit** from the page Actions menu to edit the configuration options or you can select **Import** to import the selections as is.
- To import the configuration without previewing, select **Import** from the Configuration Bundles page Actions menu. You are prompted to confirm that you want to import the configuration without previewing it first.



Important: You should verify that you want to import the settings in the Server Config portion of the Content Server sections. These settings determine configurations such as the type of web server used, the mail server, and other system-specific items. You may not want to import those configuration settings on a new content server.

4. After selecting **Import** from either the Preview Screen or the Configuration Bundles Screen, the [Recent Actions Screen](#) (page 3-26) is displayed showing the status of the import.
5. This screen refreshes automatically to show the most recent history and status.

To view details of the action, click the message in the Status column. See [Viewing Status Information](#) (page 3-14) for more details.

Downloading a Bundle

A bundle can be downloaded and stored in an easily accessible location for other instances of the content server to use.

Follow these steps to download a bundle:

1. Select **Configuration Bundles** from the [Migration Options](#) (page 3-15) or from the top menu of any Migration screen.

The [Configuration Bundles Page](#) (page 3-16) is displayed.

2. Select **Download** from the bundle Actions menu of the bundle to be downloaded. A prompt appears where you can enter the bundle location.
3. Enter the appropriate location and click **Save**.

Viewing Status Information

Follow these steps to view status information for any import or export actions:

1. Select **Recent Actions** from [Migration Options](#) (page 3-15) or from the top menu of any Migration screen.

The [Recent Actions Screen](#) (page 3-26) is displayed.

2. To view details of the events, click on a status in the message in the Status column.

The [Status Detail Report](#) (page 3-27) is displayed.



Note: The Recent History screen automatically appears after an export or an import.

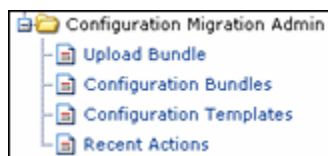
CONFIGURATION MIGRATION INTERFACE SCREENS

The following screens are used to export and import configuration migration bundles:

- ❖ [Migration Options](#) (page 3-15)
- ❖ [Upload Configuration Bundle Screen](#) (page 3-16)
- ❖ [Configuration Bundles Page](#) (page 3-16)
- ❖ [Configuration Templates Page](#) (page 3-18)
- ❖ [Configuration Migration Admin Screen](#) (page 3-19)

- ❖ [Content Server Sections](#) (page 3-23)
- ❖ [Preview Screen](#) (page 3-24)
- ❖ [Edit Export Rule Screen](#) (page 3-25)
- ❖ [Recent Actions Screen](#) (page 3-26)
- ❖ [Status Detail Report](#) (page 3-27)

Migration Options



The migration options are used to access the four basic functions of configuration migration. To access these options, click the plus symbol next to **Configuration Migration Admin** in the Trays menu. You can also access these options by clicking **Administration** at the top of the Admin Applets page then clicking on the Configuration Migration Admin icon.

Feature	Description
Upload Bundle	Displays the Upload Configuration Bundle Screen (page 3-16), used to access configuration bundles.
Configuration Bundles	Displays the Configuration Bundles Page (page 3-16), used to import information from the uploaded bundles.
Configuration Templates	Displays the Configuration Templates Page (page 3-18), used to access templates.
Recent Actions	Displays the Recent Actions Screen (page 3-26), where details about imports and exports appears.

Upload Configuration Bundle Screen

The Upload Bundle screen is used to acquire a zipped file for use in the import process or to acquire a template file.

To access this screen, select **Upload Bundles** from the [Migration Options](#) (page 3-15).

Feature	Description
Select Bundle/Browse	Used to browse the contents of the file system to access the zipped bundle.
Create Export Template	Used to create a new template based on the template that was used to create the bundle. After uploading, the template name is displayed on the Configuration Templates Page (page 3-18)
Force Overwrite	Specifies that any information that will be imported can overwrite existing content server configuration information.

Configuration Bundles Page

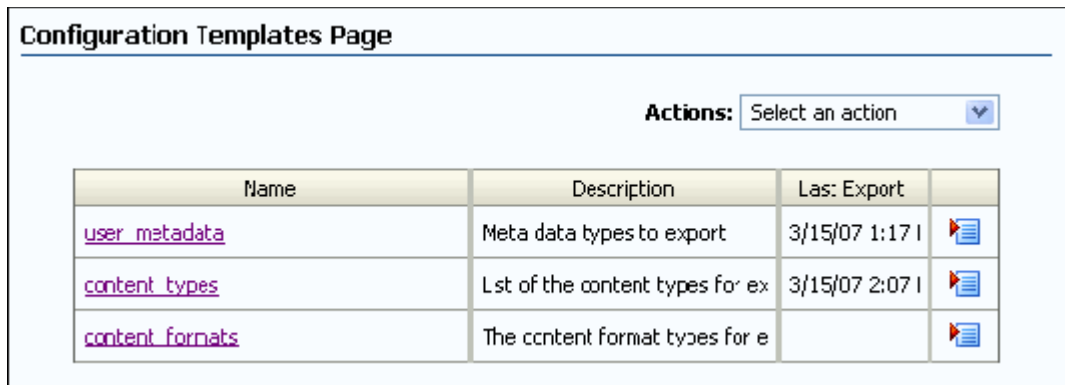
Name	Source	Last Import	Export Date	
user_metadata-id-1-27070315T:81727	MHOFFMANN		3/15/07 1:17 I	
content_types_idc_2_20070315T190717	MHOFFMANN		3/15/07 2:07 I	

The Configuration Bundles Page is used to select an existing bundle for use on the current content server.

To access this screen, select **Configuration Bundles** from the [Migration Options](#) (page 3-15).

Feature	Description
Page Actions Menu	Displays the page Actions menu with the following option: ❖ Delete All: deletes all current configuration export bundles.
Name	Displays the names of existing configuration bundles.
Source	Displays the location where the bundle was obtained.
Last Import	Displays the date and time of the last import of the bundle.
Export Date	Displays the date and time of the last export of the bundle.
Actions menu	Each bundle contains a separate Actions menu with the following options: Edit: displays the Configuration Migration Admin Screen (page 3-19) where you can alter the configuration information to be imported. Preview: displays the Preview Screen (page 3-24) where you can view the configuration information to be used. Delete: used to delete the bundle. History: displays the Status Detail Report (page 3-27) where details about the import process are displayed. The title of this screen is changed to History when it is accessed from this Action menu. Download: displays a dialog prompt, allowing you to save the zipped version of the bundle in a specified location.

Configuration Templates Page



The Configuration Templates Page lists previously defined templates and their export history. To access this screen, select **Configuration Templates** from the [Migration Options](#) (page 3-15).

Feature	Description
Page Actions Menu	<p>Displays the page Actions menu with the following options:</p> <ul style="list-style-type: none"> ❖ Create New Export: displays the Configuration Migration Admin Screen (page 3-19). ❖ Delete All: deletes all current configuration export templates.
Name	Displays the names of existing configuration templates.
Description	Displays the description of the configuration templates. This description was entered on the Edit Export Rule Screen (page 3-25).
Last Export	Displays the date and time of the last export using this template.

Feature	Description
Actions menu	<p>Each template contains a separate Actions menu with the following options:</p> <p>Edit: displays the Configuration Migration Admin Screen (page 3-19) where you can alter the configuration information for that template.</p> <p>Preview: displays the Preview Screen (page 3-24) where you can view the configuration information to be used.</p> <p>Delete: allows you to delete the template.</p> <p>History: displays the Status Detail Report (page 3-27), where details about the export process are displayed (the title of this screen is changed to History when it is accessed through this action menu).</p>

Configuration Migration Admin Screen

Config Migration Admin
 Define template --> [bundle](#)

Actions: Select an action

Action Options [\[Hide\]](#)

Name	
Continue On Error	<input checked="" type="checkbox"/>
Email Results	<input type="checkbox"/>
Add Dependencies	<input checked="" type="checkbox"/>
Ignore Dependencies	<input type="checkbox"/>
Use Custom Output Bundle Filename	<input type="checkbox"/>

Child Sections [\[Hide\]](#)

Section Name	Items	Section Description
Content: Server Sections	0	Content Server Configuration S


The Configuration Migration Admin Screen is used to determine which sections of the Content Server will be exported or imported and which actions should occur at the export or import action.

To access this screen, do one of the following:

- ❖ select **Create New Template** from the page Actions menu on the [Configuration Templates Page](#) (page 3-18).
- ❖ select **Edit** from one of the template Actions menus on the [Configuration Templates Page](#) (page 3-18) or the [Configuration Bundles Page](#) (page 3-16).
- ❖ click the template name on the [Configuration Templates Page](#) (page 3-18) or the bundle name on the [Configuration Bundles Page](#) (page 3-16).

Three main areas appear on this screen:

- ❖ the page Action menu, described below.
- ❖ the Action Options section, described below.
- ❖ the Content Server Sections area. See [Content Server Sections](#) (page 3-23) for more details.

Feature	Description
Page Actions Menu	<p>Depending on which page accessed the Configuration Migration Admin page, different menu options appear:</p> <ul style="list-style-type: none"> ❖ Save or Save As: displays the Edit Export Rule Screen (page 3-25) where you can enter the name of the template. <p> Note: You must select Save or Save As in order for the configuration information to be saved. If you preview, edit, or re-select items, that information is not saved until you select Save or Save As from the Actions menu.</p> <ul style="list-style-type: none"> ❖ Preview: displays the Preview Screen (page 3-24) where you can view the configuration that will be exported or imported. ❖ Export or Import: performs the action (Export or Import) then displays the Recent Actions Screen (page 3-26), showing the status of the action. ❖ Select All: selects all Content Server sections for inclusion in the configuration. ❖ Unselect All: unselects all Content Server Sections from the configuration.

The following Action Options appear on this screen:

Feature	Description
Continue on Error	Specifies that the export or import will continue even if errors are encountered. Errors will be reported in the status file in the entry on the Recent Actions Screen (page 3-26).
Email results	Mails results to the user who initiated the export or import.

Feature	Description
Add Dependencies	<p>Selected: dependencies will be added to the export or import bundle.</p> <p>Unselected: dependencies are not added to the bundle.</p>
Ignore Dependencies	<p>Selected: If the checkbox is selected, dependencies are ignored.</p> <p>Unselected: dependencies are not ignored. This may cause the export or import to fail. See the status file for the action on the Recent Actions Screen (page 3-26).</p>
Custom Name/Overwrite Duplicates	<p>When accessed from the Configuration Templates screen, the Custom Name field appears where a unique name is generated when the a bundle is created using this template.</p> <p>When accessed from the Configuration Bundles screen, the Overwrite Duplicates name field appears. Selecting this option will allow the importing template to overwrite any duplicate entries in the existing configuration.</p>

Content Server Sections

Child Sections [Hide]		
Section Name	Items	Section Description
Content Metadata	0	Content Metadata Definitions Section
Content Types	0	Content Types Section
Content Formats	0	Content Formats Section
File Extensions	0	File extension to file format maps
User Metadata	0	User Metadata Definitions Section
Aliases	0	Aliases Section
Security Groups	0	Security Groups Definitions Section
Roles	0	Roles Section
Predefined Accounts	0	Predefined Accounts Section
Subscription Types	0	Subscription Types Section
Schema Views	0	Schema Views Section
Schema Tables	0	Schema Tables Section
Schema Relations	0	Schema Relations Section
Application Fields	0	Application Fields Section
Workflows	0	Workflows Section
Workflow Templates	0	Workflow Templates Section
Workflow Tokens	0	Workflow Tokens Section
Workflow Scripts	0	Workflow Scripts Section

The Content Server Sections is the bottom half of the [Configuration Migration Admin Screen](#) (page 3-19). This part of the Configuration Migration Admin Screen is used to specify which aspects of the content server will be included in the export template.

Each section of this screen can be further expanded to show the specific metadata fields associated with that section.

Figure 3-9 Expanded Content Server Sections

Items for section 'docformats'			[Hide]
dFormat	dConversion	dDescription	
application/msword	FASSTHRU	apMicrosoftWordDesc	<input type="checkbox"/>
application/postscript	FASSTHRU	apPostscriptFileDesc	<input type="checkbox"/>
application/rtf	FASSTHRU	apRtfDesc	<input type="checkbox"/>
application/vnd.ms-excel	FASSTHRU	apMicrosoftExcelDesc	<input type="checkbox"/>
application/vnd.ms-powerpoint	FASSTHRU	apMicrosoftPowerPointDesc	<input type="checkbox"/>
application/wordperfect	FASSTHRU	apWordPerfectDesc	<input type="checkbox"/>
application/write	FASSTHRU	apMicrosoftWriteDesc	<input type="checkbox"/>
text/html	FASSTHRU	apHtmlFileDesc	<input type="checkbox"/>
text/plain	FASSTHRU	apTextFileDesc	<input type="checkbox"/>

Preview Screen

Export Preview

Actions: ▾

Action Options [Hide]

Name	
Continue On Error	No
Email Results	No
Add Dependencies	Yes
Ignore Dependencies	No
Use Custom Output Bundle Filename	

Preview

Content Metadata [Hide]

dName	dType	dCaption
xComments	Memo	Comments

Content Types [Hide]

dDocType	dDescription
ADACCT	Acme Accounting Department

The Preview Screen is used to view the content server items that will be exported or imported. To access this screen, click **Preview** from any of the following screens:

- ❖ the page Actions menu on the [Configuration Migration Admin Screen](#) (page 3-19)
- ❖ individual Actions menu from the [Configuration Bundles Page](#) (page 3-16)

- ❖ individual Actions menu from the [Configuration Templates Page](#) (page 3-18)

The screen title changes depending on where the Preview is launched.

The other information on this screen was created using the [Configuration Bundles Page](#) (page 3-16) or the [Configuration Templates Page](#) (page 3-18).

Feature	Description
Page Actions Menu	<p>Displays the page Actions menu with the following options:</p> <ul style="list-style-type: none"> ❖ Edit: displays the Configuration Migration Admin Screen (page 3-19) where you can edit the configuration information. ❖ Export or Import: performs the selected action.

Edit Export Rule Screen

The Edit Export Rule screen is used to name a template for exporting. This screen is displayed when a template is saved or edited. See [Creating a Configuration Migration Template](#) (page 3-7) for details.

Feature	Description
Name	The name of the new template. Names cannot contain spaces or special characters (#, \$, %, and so on).
Description	Enter a description for the template.

Recent Actions Screen

Recent Actions			
		Actions: Select an action ▼	
		Page Refresh (In Seconds): 10 ▼	
Time	Section	Type	Message
3/15/07 2:10 PM	emptysection	Info	Starting
3/15/07 2:10 PM	docformats	Info	Exporting 'application/msword'.
3/15/07 2:10 PM	docformats	Error	csCmuErrorSavingResultBinderToFile File I/O
3/15/07 2:10 PM	docformats	Info	Exporting 'application/postscript'.
3/15/07 2:10 PM	docformats	Error	csCmuErrorSavingResultBinderToFile File I/O
3/15/07 2:10 PM	docformats	Info	Exporting 'application/rtf'.
3/15/07 2:10 PM	docformats	Error	csCmuErrorSavingResultBinderToFile File I/O
3/15/07 2:10 PM	docformats	Info	Exporting 'application/vnd.ms-excel'.
3/15/07 2:10 PM	docformats	Error	csCmuErrorSavingResultBinderToFile File I/O
3/15/07 2:10 PM	docformats	Info	Exporting 'application/vnd.ms-powerpoint'.
3/15/07 2:10 PM	docformats	Error	csCmuErrorSavingResultBinderToFile File I/O
3/15/07 2:10 PM	docformats	Info	Finished section.

The Recent Actions screen displays the history of recent actions, those that have occurred since the last time the history file was cleared using the **Clear History** option on the page Actions menu. This screen appears after an import or export process, or you can access this screen by selecting Recent Actions from the top menu of any Migration screen. This screen refreshes automatically at a user-selectable time interval so the most recent actions are displayed.

Feature	Description
Page Actions Menu	Displays the page Actions menu with the following option: ❖ Clear History : clears all history files that are displayed.
Refresh Menu	Displays options to use to set the page refresh schedule.
Time	Displays the date and time when the action was initiated.
Section	Displays the Content Server Section used for the action.

Feature	Description
Type	Displays the type of action, including Info or Error.
Message	Displays information about the action.

Status Detail Report

Action History			
History for 'user_metadata'			
Time	Section	Type	Message
3/15/07 1:17 PM	emptysection	Info	Starting
3/15/07 1:17 PM	emptysection	Info	Finished
3/19/07 3:34 PM	emptysection	Info	Starting
3/19/07 3:34 PM	docmetadef	Info	Checking dependencies for 'xComments'
3/19/07 3:34 PM	fileextensions	Info	Checking dependencies for 'doc'
3/19/07 3:34 PM	fileextensions	Info	Checking dependencies for 'dot'
3/19/07 3:34 PM	fileextensions	Info	Checking dependencies for 'htm'
3/19/07 3:34 PM	fileextensions	Info	Checking dependencies for 'html'
3/19/07 3:34 PM	fileextensions	Info	Checking dependencies for 'ppt'
3/19/07 3:34 PM	fileextensions	Info	Checking dependencies for 'ps'
3/19/07 3:34 PM	fileextensions	Info	Checking dependencies for 'rtf'
3/19/07 3:34 PM	fileextensions	Info	Checking dependencies for 'txt'

Click on the status of any action and see the details for that action.

Feature	Description
Time	Displays the date and time when the action was initiated.
Section	Displays the Content Server Section used for the action.
Type	Displays the type of action, including Info or Error.
Message	Displays information about the action.

ARCHIVES, COLLECTIONS AND BATCH FILES

Archiving your content consists of three elements: the archive itself, a collection, and a batch file.

This chapter discusses how to create these archiver elements. It covers these topics:

Concepts

- ❖ [Archive Details](#) (page 4-2)
- ❖ [Managing Archives](#) (page 4-8)
- ❖ [Managing Collections](#) (page 4-11)
- ❖ [Managing Batch Files](#) (page 4-14)

Tasks

- ❖ [Creating a New Archive](#) (page 4-9)
- ❖ [Copying an Existing Archive](#) (page 4-9)
- ❖ [Creating a New Archive by Copying](#) (page 4-10)
- ❖ [Deleting an Archive](#) (page 4-10)
- ❖ [Opening a Collection](#) (page 4-11)
- ❖ [Creating a Collection](#) (page 4-12)
- ❖ [Removing a Collection](#) (page 4-13)

- ❖ [Moving the Default Archive Collection](#) (page 4-13)
- ❖ [Removing Revisions from a Batch File](#) (page 4-14)
- ❖ [Deleting a Batch File](#) (page 4-15)

Interface

- ❖ [Archiver \(General Tab\)](#) (page 4-16)
- ❖ [Add Archive Screen](#) (page 4-18)
- ❖ [Copy Archive Screen](#) (page 4-19)
- ❖ [Open Archive Collection Screen](#) (page 4-19)
- ❖ [Find Archive Collection Definition File Screen](#) (page 4-21)
- ❖ [Browse To Archiver Collection Screen](#) (page 4-22)
- ❖ [Browse for Proxied Collection Screen](#) (page 4-23)
- ❖ [View Batch Files Screen](#) (page 4-24)
- ❖ [View Exported Content Items Screen](#) (page 4-25)

ARCHIVE DETAILS

This section describes the structure of the archiver and how it uses collections and targets. For an overview of the archiver and how it compares to other archiving tools, see [Chapter 2 \(Archiving Overview\)](#).

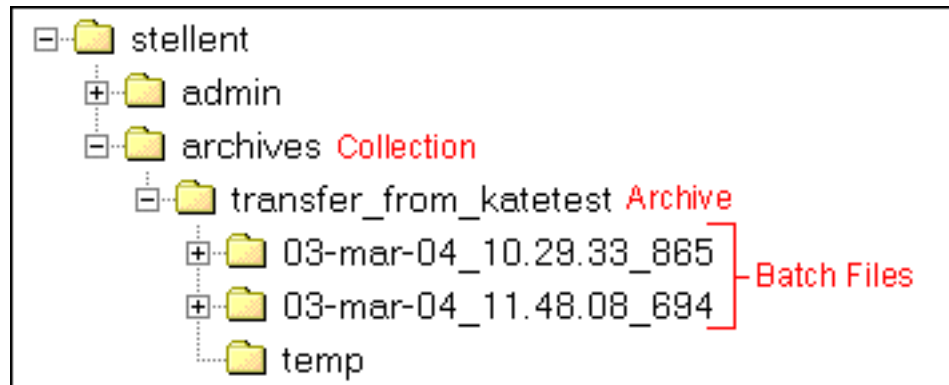
Archive Structure

An *archive* is a set of exported content files and their associated batch files. Each archive has its own subdirectory in the collection it belongs to.



Caution: Do not edit any of the files created by Archiver.










Figure 4-10 Archive directory structure



An archive subdirectory includes the following:

File or Directory	Description
Batch file directories	Each batch file has a subdirectory in the archive. The subdirectory name reflects the date and time of the export, with a default format of <i>yy-MMM-dd_HH.mm.ss_SSS</i> . For example, <i>03-feb-04_15.04.14_174</i> .
<i>temp</i> directory	Contains transferred Zip files.
<i>archive.hda</i> file	Specifies information about the archive, such as export and import settings, the export query, field and value import maps, archiving history, and so forth.
<i>doctypes.hda</i> file	Lists the content types (<i>DocTypes</i> database table) in the source content server. This file is present only if content types were exported.
<i>exports.hda</i> file	Specifies the batch files that are included in the archive.
<i>users.hda</i> file	Lists the user attributes (<i>Users</i> database table) in the source content server. This file is present only if user attributes were exported.

Figure 4-11 Archive subdirectory structure

Address  C:\stellent\archives\transfer_from_katetest			
Name ▲	Size	Type	Modified
 03-mar-04_10.29.33_865		File Folder	3/7/2003 10:11 AM
 03-mar-04_11.48.08_694		File Folder	3/4/2003 11:44 AM
 temp		File Folder	3/4/2003 10:25 AM
 archive.hda	1 KB	HDA File	3/4/2003 11:44 AM
 doctypes.hda	1 KB	HDA File	3/4/2003 11:44 AM
 exports.hda	1 KB	HDA File	3/4/2003 11:44 AM
 lockwait.dat	1 KB	DAT File	3/4/2003 10:11 AM
 users.hda	1 KB	HDA File	3/4/2003 11:44 AM

Collections

A *collection* is a set of archives on a particular content server instance.

- ❖ Each instance has a default collection, which is located in the `<install_dir>/archives/` directory. Additional collections can be created, but are necessary only in rare situations. For example, you could create a new collection if you want to save disk space by archiving to another system that does not have Content Server on it.
- ❖ Collections can be created only through the stand-alone Archiver. See [Running Stand-Alone Applications](#) (page 2-11) for details about using the stand-alone Archiver.
- ❖ A collection can be removed from a content server instance, but this only makes it unavailable from the Archiver application; the archive and batch files remain until you delete them from the file system.



Tech Tip: Archiver collections are normally compatible between different versions of Content Server. One possible exception would be User Configuration information that was archived from a pre-3.0 content server instance. The format of the *Users* database table changed in version 3.0, so this information might not be compatible between pre- and post-3.0 content servers.

Collection Structure

An archive collection includes the following:

File or Directory	Description
<i>collection.hda</i> file	Specifies the archives that are included in the collection.
<i>collection.mrk</i> file	Internal file used by Archiver.
Archive directories	Each archive has a subdirectory in the collection.

Figure 4-12 Collection structure

Name	Size	Type	Modified
transfer_from_katetest		File Folder	3/4/2003 11:44 AM
collection.hda	1 KB	HDA File	3/4/2003 10:11 AM
collection.mrk	1 KB	MRK File	3/4/2003 11:44 AM
lockwait.dat	1 KB	DAT File	11/13/2002 1:08 PM

Batch Files

A *batch file* is a text file that contains the file records for archived content items. Batch files describe the metadata for each exported revision.

- ❖ A new batch file subdirectory is created each time an archive is exported.
- ❖ Each batch file contains up to 1000 file records. If an export contains more than 1000 revisions, a new batch file is created.



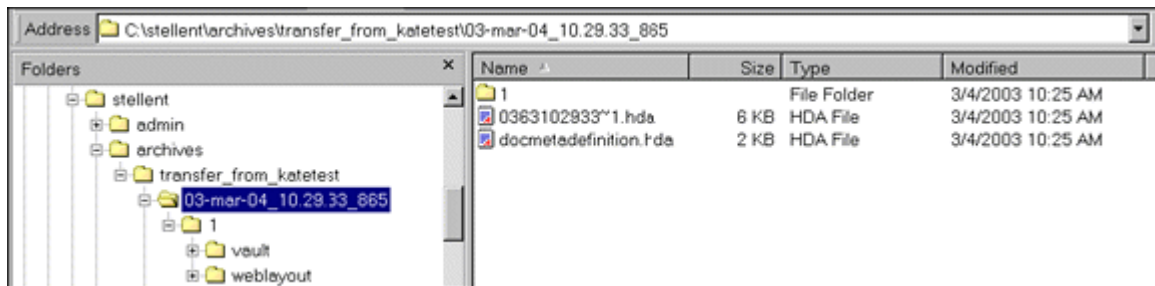
Note: Archiver batch files are not the same as the batch files that are used with the Batch Loader application.

Batch File Structure

A batch file subdirectory includes the following:

File or Directory	Description
Content files	A subdirectory named “1” in the batch file directory contains a <i>vault</i> structure that is copied from the source content server. If web-viewable files are being archived, this subdirectory also contains a <i>weblayout</i> structure.
Batch file	Specifies the metadata for each revision that was exported. Batch files are HDA files that are named with a unique number generated by Archiver. For example, <i>0335150414~1.hda</i> .
<i>docmetadefinition.hda</i> file	Lists the custom metadata fields in the source content server (<i>DocMetaDefinition</i> database table). This file is used by Archiver to create import maps.

Figure 4-13 Batch file structure



Archive Targets

You can use the archiver to archive the following content:

- ❖ Native files with associated standard metadata values
- ❖ Web-viewable files (*.pdf*, *.html*, and so forth)
- ❖ Metadata fields and changes
- ❖ User information fields
- ❖ Security groups (user attributes and settings)

- ❖ User updates
- ❖ Subscription types
- ❖ File formats
- ❖ Document types
- ❖ Content types
- ❖ User attributes (such as user login, full name, password, e-mail address, and so forth)



Note: Content types and user attributes can be exported and imported manually, but cannot be transferred or archived automatically through replication. Table replication can be used, though, to replicate user information.



Caution: Archiver cannot be used to move or copy data between two instances that share the same content server instance name (*IDC_Name*). To do so will corrupt the data on the target system.

Using Archive Logs

If you are experiencing Archiver problems, view the Archiver logs for more information. For additional information, see the *Content Server Troubleshooting Guide*, which contains information about troubleshooting Archiver problems.

The Archiver logs are listed by date and time. They are generated once a day when the first Archiver information status, fatal error, or error occurs.

Click the Archiver Logs link on the Administration page to view information about imports, exports, and replications.

Click the link that appears for the desired log file. A table showing the type, date and time, and description of each action is displayed. It also includes the name of the content server instance that created the archive.

Figure 4-14 Archive log file

Archiver -- Log File Created: 8/30/04 11:12 AM		
Type	Time	Description
Info	8/30/04 11:12 AM	Log organization created by application.
Info	8/30/04 11:12 AM	Event generated by user 'sysadmin' at host 'jwilsonnote'. Added archive 'JeanTest' to collection 'idcm1'.
Info	8/30/04 1:37 PM	Event generated by user 'sysadmin' at host 'jwilsonnote'. Edited properties for archive 'JeanTest' in collection 'idcm1'. Updated values: aExportQuery = Standard Query ValuePanel UseExportDate 0 AllowExportPublished 0 AllRevisions 1 LatestRevisions 0 NotLatestRevisions 0 CurrentIndex 0 Clauses dDocName:sqlEq:002Tutorial CustomQuery dDocName%=%'002Tutorial' IsCustom 1.

Archiver Log Entries

The following types of archiver log entries are generated:

- ❖ **Info:** Displays basic status information. For example, status information is logged when an export and an import starts and finishes.
- ❖ **Error:** Displays user/administration errors that occur but do not stop the software from functioning. For example, an error is logged if there is no file information for a content item that you are trying to export.
- ❖ **Fatal:** Displays errors that stop the software from functioning. For example, a fatal error is logged if the content server cannot access the database. Check the connection string, user name, and password.

MANAGING ARCHIVES

After archives are created, they can be added to collections and manipulated as a group. This section describes the tasks involved in managing archives:

- ❖ [Creating a New Archive](#) (page 4-9)
- ❖ [Copying an Existing Archive](#) (page 4-9)
- ❖ [Creating a New Archive by Copying](#) (page 4-10)

- ❖ [Deleting an Archive](#) (page 4-10)

Creating a New Archive

To create a new, undefined archive:

1. Display [The Main Archiver Screen](#) (page 2-12) in either stand-alone or browser mode.
2. If necessary, open the collection where you want to create the new archive. See [Opening a Collection](#) (page 4-11).
3. Select **Edit—Add**.
The [Add Archive Screen](#) (page 4-18) is displayed.
4. Enter the archive name and description. The archive name cannot contain spaces.
5. Click **OK**.

Copying an Existing Archive



Note: This procedure copies the files in an archive. It does not create a new collection or update the *collection.hda* file if the archive is copied to a collection directory.

To copy an existing archive to a different directory location:

1. Display the archiver in stand-alone mode.
2. If necessary, open the collection that contains the archive to be copied. See [Opening a Collection](#) (page 4-11).
3. Select the archive to be copied.
4. Select **Edit—Copy To**.
The [Copy Archive Screen](#) (page 4-19) is displayed.
5. Accept the original archive name, or change the name as necessary.
6. In the **Copy Archive To Directory** field, enter the directory path where the archive will be copied.
7. Click **OK**.

The archive files are copied to the specified directory.

Creating a New Archive by Copying

You can copy archives from your system for storage or to your system from another archive if you are using the Archiver stand-alone version.

To create a new archive in the current collection by copying an existing archive:

1. Display the archiver in stand-alone mode.
2. If necessary, open the collection where you want to create the new archive. See [Opening a Collection](#) (page 4-11).
3. Select **Edit—Add**.
The [Add Archive Screen](#) (page 4-18) is displayed.
4. Enter the archive name and description. The archive name cannot contain spaces.
5. Select the **Copy From** check box.
6. Click **Browse**.
7. Navigate to and select the desired archive file (*archive.hda*).
8. Click **Open**.
9. Click **OK**.

The archive files are copied to the default archive directory in the local content server instance.

Deleting an Archive

To delete an archive from a collection:

1. Open the archive collection.
2. Select the archive to delete in the Current Archives list.
3. Select **Edit—Delete**.
You are prompted to confirm the action.
4. Click **OK**.

The archive is deleted from the collection.

MANAGING COLLECTIONS

Collections are a set of archives and are used to group archives for different archive functions. This section describes how to manage collections, including the following tasks:

- ❖ [Opening a Collection](#) (page 4-11)
- ❖ [Creating a Collection](#) (page 4-12)
- ❖ [Removing a Collection](#) (page 4-13)
- ❖ [Moving the Default Archive Collection](#) (page 4-13)



Note: The stand-alone version of the Archiver application is required to create new collections or browse the local file system to connect to new collections.

Opening a Collection

To open an existing archive collection:

1. Display the archiver in stand-alone mode.
2. Select **Options—Open Archive Collection**.

The [Open Archive Collection Screen](#) (page 4-19) is displayed, with the default collection and any other connected collections listed.

3. Select the collection from the list, or browse to a new collection as follows:
 - To select the collection from a shared file system location (stand-alone Archiver only):
 - a. Click **Browse Local**. The [Find Archive Collection Definition File Screen](#) (page 4-21) is displayed.
 - b. Navigate to and select the collection HDA file.
 - c. Click **Open**.
 - To select the collection from a remote content server instance:
 - a. Click **Browse Proxied**.
The [Browse for Proxied Collection Screen](#) (page 4-23) is displayed. The list includes all content server instances to which an outgoing provider has been set up.
 - b. Select the content server instance in the **Proxied Servers** list.

- c. Select the collection in the **Collections** list.
- d. Click **OK**.

4. Click **Open**.

The [Browse To Archiver Collection Screen](#) (page 4-22) is displayed.

Creating a Collection



Note: You can create a new collection only on the local content server instance using the stand-alone Archiver.

To create a new archive collection:

1. Display the archiver interface in stand-alone mode.
2. Select **Options—Open Archive Collection**.

The [Open Archive Collection Screen](#) (page 4-19) is displayed.

3. Click **Browse Local**.

The [Find Archive Collection Definition File Screen](#) (page 4-21) is displayed.

4. Navigate to and select the directory where you want to create the new collection.
5. Enter a file name for the new collection (*collection.hda* is the default).
6. Click **Open**.

You are prompted to create a collection definition (HDA) file.

7. Click **Yes**.

The [Browse To Archiver Collection Screen](#) (page 4-22) is displayed.

8. Enter a collection name in the **Name** field.
 - Collection names cannot contain spaces.
 - Use the same name for a collection and its directory to make navigation easier.
9. Enter the directory path for the *weblayout* and *vault* directories in the **Web Directory** and **Vault Directory** fields.
 - Use the same path style as shown in the Location field.
 - To find the directory paths, display the Configuration Information Page.
10. Click **OK**.

The new collection is shown in the Open Archive Collection screen.

11. Click **Open** to open the new collection.

Removing a Collection



Note: You cannot remove the default collection.

To remove an archive collection:

1. Select **Options—Open Archive Collection**.

The [Open Archive Collection Screen](#) (page 4-19) is displayed.

2. Select the collection to be removed.
3. Click **Remove**.

You are prompted to confirm the action.

4. Click **OK**.

The collection is removed from the content server instance. (The collection and archive files remain in the file system, and must be deleted manually.)

Moving the Default Archive Collection

You can change the file system location of the default archive collection by moving the collection and pointing the content server to the new location. For example, you might want to keep all of your archive data on a separate drive from the program files for easier backup and expansion.



Note: The default collection is the `<install_dir>/archives/` directory.

To move the default archive collection:

1. For data safety, close any stand-alone Archiver applications and stop the content server.
2. Add the `CollectionLocation` configuration variable to the `<install_dir>/bin/intradoc.cfg` file:

```
CollectionLocation=path
```

3. To maintain the previously created archives for the default collection, move the contents of the `<install_dir>/archives/` directory to the new location you specified in the `CollectionLocation` setting.

If you do not move the contents, the system creates an empty collection.

4. Start the content server.



Note: The content server will recreate the default `<install_dir>/archives/` directory when it is restarted, but the Archiver will default to using the collection in the new location.

MANAGING BATCH FILES

A batch file describes the metadata for exported revisions. A batch file is created each time the archiver performs an export. This section describes the following tasks used to manage batch files:

- ❖ [Removing Revisions from a Batch File](#) (page 4-14)
- ❖ [Deleting a Batch File](#) (page 4-15)

Removing Revisions from a Batch File

To remove individual revisions from a batch file:

1. Open the archive collection. See [Opening a Collection](#) (page 4-11).
2. Select the archive in the Current Archives list.
3. Click **View Batch Files** on the [Archiver \(General Tab\)](#) (page 4-16).
The [View Batch Files Screen](#) (page 4-24) is displayed.
4. Select the batch file.
5. Click **Edit**.
The [View Exported Content Items Screen](#) (page 4-25) is displayed.
6. Use the **Filter** feature and the navigation buttons to display the revision to be deleted.
7. Select the revision to be deleted.
8. Click **Delete**.
The Status changes to *Deleted* for the selected revision.
9. Repeat steps 7 and 8 to delete additional revisions.

10. To undo the last deletion, click **Undo**. To return all deleted revisions to *Archived* status, click **Refresh**.
11. Click **Apply** to delete the specified revisions.
12. Click **Close**.

Deleting a Batch File

To delete a batch file from an archive:

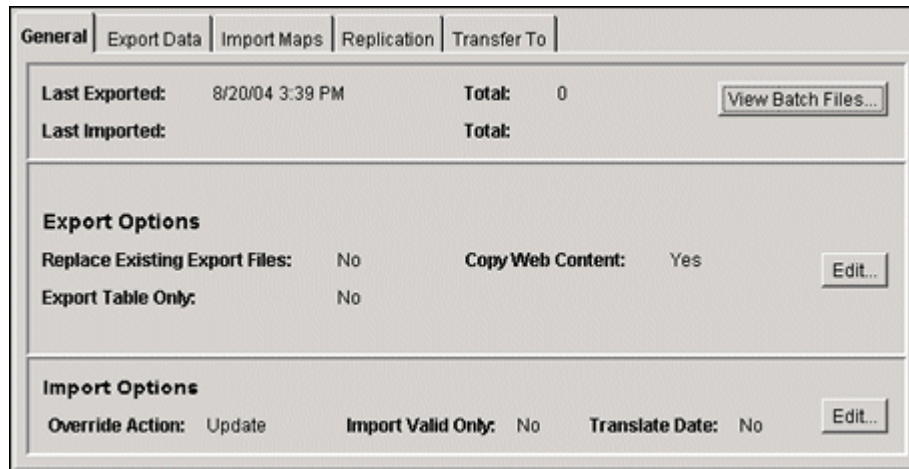
1. Open the archive collection. See [Opening a Collection](#) (page 4-11).
2. Select the archive in the Current Archives list.
3. Click **View Batch Files** on the [Archiver \(General Tab\)](#) (page 4-16).
The [View Batch Files Screen](#) (page 4-24) is displayed.
4. Select the batch file to delete.
5. Click **Delete**.
You are prompted to confirm the action.
6. Click **OK**.
The batch file is deleted from the archive.
7. Specify whether to replace existing batch files upon export:
 - To delete all existing batch files when the next export is initiated, select the **Replace Existing Export Files** check box.
 - To leave existing batch files in place when the next export is initiated, clear the **Replace Existing Export Files** check box.
8. Specify which files to export:
 - To export the native (*vault*) and web-viewable (*weblayout*) files, select the **Copy Web Content** check box.
 - To export only the native (*vault*) files, clear the **Copy Web Content** check box.
9. Click **OK**.
The export options are displayed in the **Export Options** section of the General tab.

ARCHIVE, COLLECTION AND BATCH INTERFACE

The screens in this section are used to create archives, collections, and batch files:

- ❖ [Archiver \(General Tab\)](#) (page 4-16)
- ❖ [Add Archive Screen](#) (page 4-18)
- ❖ [Copy Archive Screen](#) (page 4-19)
- ❖ [Open Archive Collection Screen](#) (page 4-19)
- ❖ [Find Archive Collection Definition File Screen](#) (page 4-21)
- ❖ [Browse To Archiver Collection Screen](#) (page 4-22)
- ❖ [Browse for Proxied Collection Screen](#) (page 4-23)
- ❖ [View Batch Files Screen](#) (page 4-24)
- ❖ [View Exported Content Items Screen](#) (page 4-25)

Archiver (General Tab)



The General tab is used to view archiving activity and set some export and import options. To access this screen, click the tab on [The Main Archiver Screen](#) (page 2-12).

Feature	Description
Last Exported field	Shows the date, time, and total number of files exported during the last export.

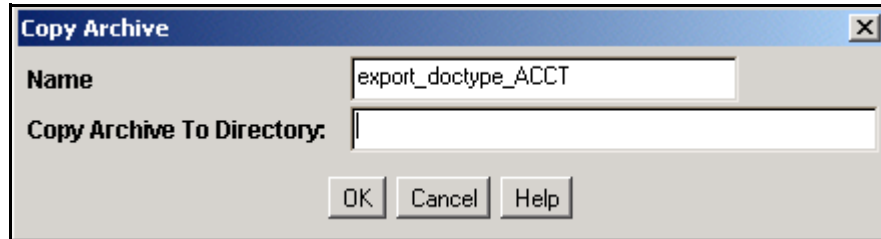
Feature	Description
Last Imported field	Shows the date, time, and total number of files imported during the last import.
View Batch Files button	Displays the View Batch Files Screen (page 4-24), used to access batch files.
Export Options	
Replace Existing Export Files field	Shows if the existing export files will be replaced on the next export.
Export Table Only field	Shows if only tables are exported or if both content and tables (if defined for export) are exported.
Copy Web Content field	Shows if the native web-viewable (<i>weblayout</i>) files will be included in the export.
Edit button	Displays the Edit Export Options Screen, where you can specify whether to replace existing exports, copy web contents, or export tables only.
Import Options	
Override Action field	Shows the rule to be used to handle existing revisions during import. See Import Rules (page 6-3) for information about the rules used during importing.
Import Valid Only field	Shows if only files that have valid option list values will be imported.
Translate Date field	Shows if dates will be translated to the target content server's time zone on import.
Edit button	Displays the Edit Import Options (Select Rules) Screen (page 6-23), used to specify how revisions are handled.

Add Archive Screen

The Add Archive screen is used to create a new archive. To access this screen, select **Edit—Add** from the [The Main Archiver Screen](#) (page 2-12).

Feature	Description
Archive Name field	The name of the new archive. Archive names cannot contain spaces.
Description field	A description of the archive.
Copy From check box	<p>Selected—The new archive will have the same export query and additional data as the existing archive specified in the Copy From field.</p> <p>Clear—The new archive will be created without an export query or additional data.</p> <p>This check box appears only in the stand-alone Archiver.</p>
Copy From field	<p>The directory path and file name of the existing archive to copy from. For example, <i>C:/stellent/archives/my_archive/archive.hda.</i></p> <p>This field appears only in the stand-alone Archiver.</p>
Browse button	Used to navigate to and select an archive to copy from. This button appears only in the stand-alone Archiver.

Copy Archive Screen



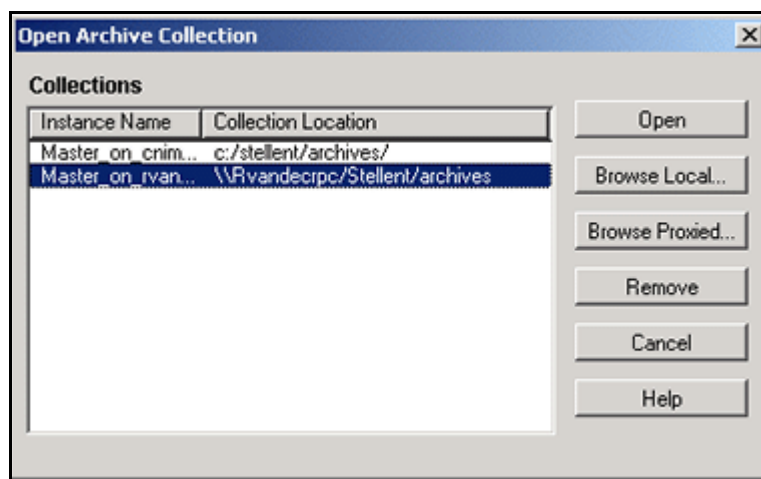
The Copy Archive screen is used to copy an archive to a different directory or file system. To access this screen, highlight an archive name and select **Edit—Copy To** from the stand-alone archiver.

Feature	Description
Name field	The name of the new archive. This defaults to the name of the archive being copied.
Copy Archive To Directory field	The directory path where the new archive will be created. This directory must exist on the file system before copying.




Note: This procedure copies the files in an archive. It does not create a new collection or update the *collection.hda* file if the archive is copied to a collection directory.

Open Archive Collection Screen

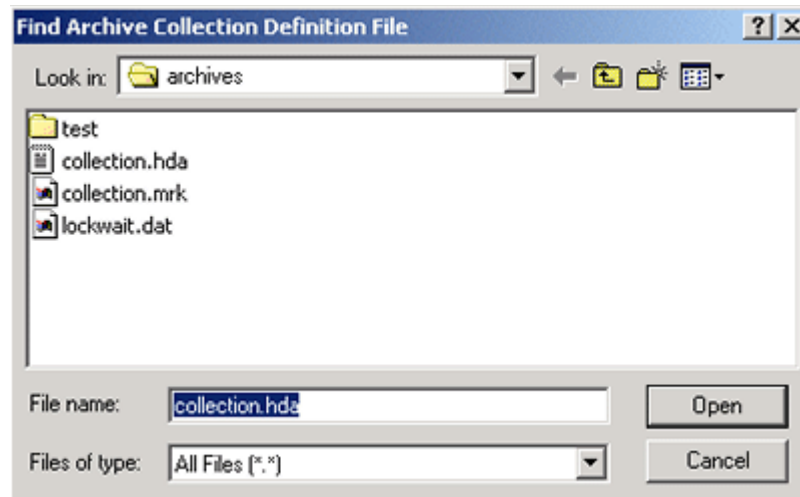


The Open Archive Collection screen is used to access sets of archives (collections).

To use this screen, select **Options—Open Collection** from the [The Main Archiver Screen](#) (page 2-12).

Feature	Description
Collections list	Lists the archive collections that are available to the content server instance.
Open button	Opens the selected collection. When the selected collection is already open, this button is unavailable.
Browse Local button	Displays the Find Archive Collection Definition File Screen (page 4-21), used to create a new collection on your local system. This button is available only in the stand-alone Archiver.
Browse Proxied button	<p>Displays the Browse for Proxied Collection Screen (page 4-23), which is used to open a collection from another content server instance.</p> <p> Note: In Archiver, the term “proxied” refers to any content server to which the local instance is connected through an outgoing provider. This does not have to be a proxied instance of the master content server.</p>
Remove button	Removes the selected collection from the content server instance. (The collection and archive files remain in the file system, and must be deleted manually.)

Find Archive Collection Definition File Screen



The Find Archive Collection Definition File screen is used to specify the directory and file name for a new archive collection when in stand-alone mode.

To access this screen, click **Browse Local** on the [Open Archive Collection Screen](#) (page 4-19).

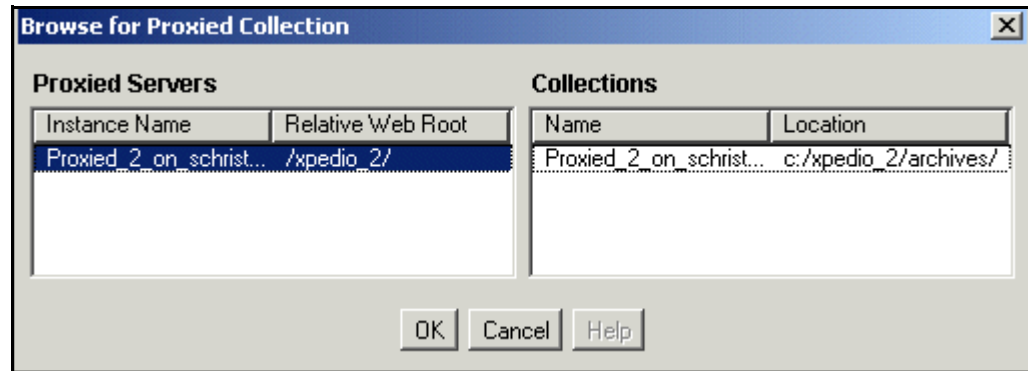
Feature	Description
Look in list	Used to navigate to the directory where the new archive collection will be created.
File name field	The file name of the collection definition (HDA) file. The default is <i>collection.hda</i> .
Open button	Displays the Browse To Archiver Collection Screen (page 4-22).

Browse To Archiver Collection Screen

The Browse To Archiver Collection screen is used to define a new archive collection while using the stand-alone archiver. To access this screen, click **Open** on the [Find Archive Collection Definition File Screen](#) (page 4-21).

Feature	Description
Name field	The name of the archive collection. <ul style="list-style-type: none"> Collection names cannot contain spaces. Use the same name as the collection directory to make navigation easier.
Location field	The path to the new collection.
Web Directory field	The path to the content server <i>weblayout</i> directory.
Vault Directory field	The path to the content server <i>vault</i> directory.

Browse for Proxied Collection Screen



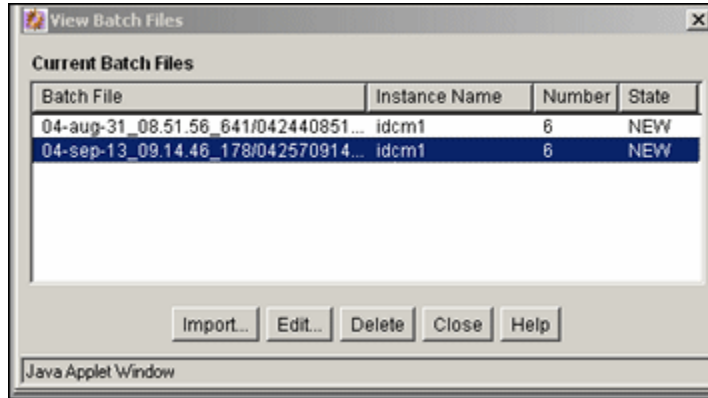
The Browse for Proxied Collection screen is used to select a collection to be opened from a remote content server. To access this screen, click **Browse Proxied** on the [Open Archive Collection Screen](#) (page 4-19).



Note: In Archiver, the term “proxied” refers to any content server to which the local instance is connected through an outgoing provider. This does not have to be a proxied instance of the master content server.

Feature	Description
Proxied Servers list	Lists the name and relative web root for each remote content server.
Collections list	Lists the name and directory path of each collection on the selected remote server.

View Batch Files Screen



The View Batch Files screen is used to view, edit, and delete batch files. To access this screen, highlight an archive and click **View Batch Files** on the [Archiver \(General Tab\)](#) (page 4-16).

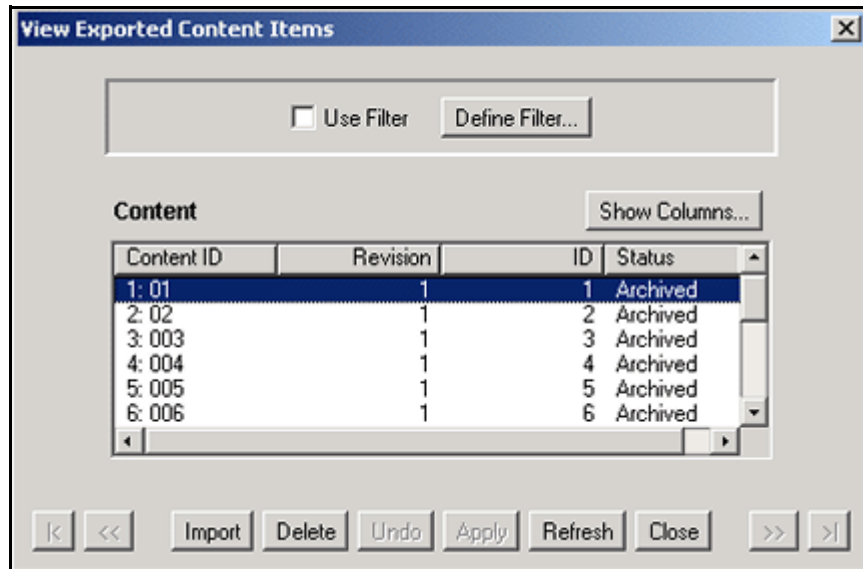


Note: This option is active only if batch files exist.

Feature	Description
Batch File column	The directory and file name of each batch file in the selected archive.
Instance Name column	The name of the content server instance.
Number column	The number of content items in the batch file.
State column	The state of the batch file. NEW —The batch file was exported manually. AutoInsert —The batch file was exported automatically.
Import button	Imports the selected batch file.
Edit button	Displays the View Exported Content Items Screen (page 4-25), which is used to import or delete specific files in a batch file.






Feature	Description
Delete button	Deletes the selected batch file from the archive.

View Exported Content Items Screen



The View Exported Content Items screen is used to import or delete specific revisions from a batch file. To access this screen, highlight a batch file name and click **Edit** on the [View Batch Files Screen](#) (page 4-24).

Feature	Description
Use Filter check box	Select this check box to use a filter to narrow the Content list.
Define Filter button	Displays the Define Filter Screen, where you can select items for inclusion in the view.
Show Columns button	Displays the Show Columns Screen, where you can select the columns to be displayed.

Feature	Description
Content list	<p>Shows the revisions in the batch file that match the filter settings.</p> <ul style="list-style-type: none"> • The list displays 50 revisions per page. • Double-clicking a revision displays the Information Page for that revision.
Top of list button 	Displays the top of the Content list.
Previous page button 	Displays the previous page of the Content list.
Import button	<p>Imports the selected revision.</p> <p> Tech Tip: If you are importing more than one revision of the same content item, make sure that you import the revisions in the correct order. Importing revisions out of order will cause errors.</p>
Delete button	Deletes the selected revisions from the batch file.
Undo button	Returns the last deleted revision to <i>Archived</i> status.
Apply button	Deletes any revisions that have Deleted status.
Refresh button	Returns all deleted revisions to <i>Archived</i> status.
Close button	Closes the screen.
Next page button 	Displays the next page of the Content list.
End of list button 	Displays the end of the Content list.

EXPORTING DATA IN ARCHIVES

The Export function is used to copy native and web-viewable files out of the content server instance for backup, storage, or import to another content server instance. You can also export content types and user attributes. Note that this is a copy only; the original content remains.

This chapter discusses how to export an archive. It covers these topics:

Concepts

- ❖ [About Exporting](#) (page 5-2)
- ❖ [Managing Exports](#) (page 5-3)

Tasks

- ❖ [The Manual Export Process](#) (page 5-3)
- ❖ [Creating a Content Item Export Query](#) (page 5-4)
- ❖ [Exporting Configuration Information](#) (page 5-6)
- ❖ [Adding a Table to an Archive](#) (page 5-7)
- ❖ [Editing the Archive Properties of a Table](#) (page 5-7)
- ❖ [Creating a Table Export Query](#) (page 5-7)
- ❖ [Setting Export Options](#) (page 5-9)
- ❖ [Initiating the Export](#) (page 5-10)

Interface

- ❖ [Main Archiver Export Screen](#) (page 5-11)
- ❖ [Export Data \(Content\) Screen](#) (page 5-11)
- ❖ [Edit Export Query \(Content\) Screen](#) (page 5-13)
- ❖ [Previewing Export Queries \(Content\) Screen](#) (page 5-17)
- ❖ [Main Archiver Export Screen \(Table\)](#) (page 5-18)
- ❖ [Add New/Edit Table Screen](#) (page 5-20)
- ❖ [Edit Export Query \(Table\) Screen](#) (page 5-22)
- ❖ [Previewing Export Queries \(Table\) Screen](#) (page 5-24)
- ❖ [Export Archive Screen](#) (page 5-24)

ABOUT EXPORTING

You can export revisions that are in RELEASED, DONE, EXPIRED, and GENWWW status. You cannot export revisions that are in an active workflow (REVIEW, EDIT, or PENDING status) or that are DELETED.

Export Uses

Typical uses for the Export function include:

- ❖ Copying files from an Intranet to make them available to an Extranet for vendor or customer viewing.
- ❖ Creating an archive of content items that will then be imported back to the same instance with different metadata.
- ❖ Removing content from the content server for permanent or temporary storage. For example, if space becomes limited or performance drops, you could remove all but the latest revision of each file.
- ❖ Copying files, content types, and user attributes from a development content server instance for use in a production instance.



Caution: Do not use Archiver as your primary method of disaster recovery; use standard backup systems for the database and file system.

Export Methods

After you set up the export criteria, you can export archives in the following ways:

- ❖ **Manual**—A one-time export initiated from Archiver by an administrator. This creates an archive on the local content server instance.
- ❖ **Automatic (Replication)**—Export to a local archive is initiated automatically whenever a content item that meets the export criteria is indexed.

[The Manual Export Process](#) (page 5-3) and [Chapter 8 \(Replicating Files\)](#) discuss these processes in more detail.



Note: You can export expired revisions manually, but expired revisions do not get exported automatically.

MANAGING EXPORTS

The following section describes typical tasks used in managing exports:

- ❖ [The Manual Export Process](#) (page 5-3)
- ❖ [Creating a Content Item Export Query](#) (page 5-4)
- ❖ [Exporting Configuration Information](#) (page 5-6)
- ❖ [Adding a Table to an Archive](#) (page 5-7)
- ❖ [Editing the Archive Properties of a Table](#) (page 5-7)
- ❖ [Creating a Table Export Query](#) (page 5-7)
- ❖ [Setting Export Options](#) (page 5-9)
- ❖ [Initiating the Export](#) (page 5-10)

The Manual Export Process

To export content manually:

1. Create an archive where the exported content server data will be stored. See [Creating a New Archive](#) (page 4-9).
2. In the Current Archives list, select the archive.
3. Create an export query. See [Creating a Content Item Export Query](#) (page 5-4).

4. Set configuration information export options. See [Exporting Configuration Information](#) (page 5-6).
5. Set the general export options. See [Setting Export Options](#) (page 5-9).
6. Initiate the export. See [Initiating the Export](#) (page 5-10).

Creating a Content Item Export Query

Export queries define which revisions will be exported. Follow these steps to create an export query:

1. Open the archive collection. See [Opening a Collection](#) (page 4-11).
2. Select the archive in the Current Archives list.
3. Click the [Main Archiver Export Screen](#) (page 5-11).
4. Click **Edit** in the Export Query (Content) section.
The [Edit Export Query \(Content\) Screen](#) (page 5-13) is displayed.
5. Select a metadata field from the **Field** list.
6. Select an **Operator** from the list.
 - The available operators depend on which Field is selected.
 - The available operators map to basic SQL query operators. To use other SQL query operators, create a basic expression and then edit it in the **Custom Query Expression** check box (see step 10).
7. Enter the criteria in the **Value** field.
Depending on the option selected in the Field list, you can enter text directly, click the Select button and select from the available values, or select directly from a list of the available values.
8. Click **Add**.
The query expression is added to the Query Expression box, and the SQL version of the query expression is displayed in the Custom Query Expression box.
9. To add to the query expression, repeat steps 5 through 8. By default, each part of the expression is added using an AND operator.

To update an existing query, select the line to be changed in the Query Expression box and edit the Field, Operator, and Value fields as necessary. Click **Update**. The specified query expression replaces the selected line.

To delete a line from the query expression, select the line to be deleted in the Query Expression box. Click **Delete**. The selected line is deleted.

10. To edit the SQL expression directly:

- a. Select the **Custom Query Expression** check box.
- b. Edit the text in the Custom Query Expression box.
 - You can use Idoc Script in the query expression. For example, to archive content more than one year old, you could use `<$dateCurrent(-365)$>` as the Release Date value. See the *Idoc Script Reference Guide* for more information.



Caution: If you clear the Custom Query Expression check box, the query expression reverts to its original definition; all modifications will be lost.

11. Specify whether to export revisions based on the last export date:

- To export only revisions that have been released since the last export, select the **Export Revisions with Release Date later than most recent Export Date** check box.
- To export all revisions, clear the **Export Revisions with Release Date later than most recent Export Date** check box.

12. Specify whether to export revisions that were published to the content server by Oracle Content Publisher:

- To export published revisions, select the **Allow Export of Published Revisions** check box.
- To export only unpublished revisions, clear the **Allow Export of Published Revisions** check box.

13. Specify which revisions to export:

- To export all revisions of each content item, select the **All Selected Revision** option.
- To export only the latest revision of each content item, select the **Latest Revision** option.
- To export all revisions except the most recent, select the **Not Latest Revisions** option.
- To export the most recent revision that matches the query, select the **Single Revision Replication** option. See [Single Revision Replications](#) (page 8-2) for details about how this option affects the replication process.



Caution: Do not use the **Latest Revision** option and automatic replication. These options, used in conjunction, can cause unpredictable archive behavior. See [Chapter 8 \(Replicating Files\)](#) for more details about automatic replication.

14. Click **OK**.

The export query is displayed in the Export Query box on the Content tab.

15. To see a list of revisions that will be included in the export, click **Preview**.

The [Previewing Export Queries \(Content\) Screen](#) (page 5-17) is displayed.



Note: Although an unlimited number of revisions can be exported, a maximum of 100 revisions can be displayed in the Content Satisfying the Export Query screen. Use the **Filter** and **Release Date since** features to display subsets of the list as necessary.

16. Review the list to make sure that the export includes the intended revisions.

17. Click **Close**.

Exporting Configuration Information

To export content type and user attributes:

1. Open the archive collection. See [Opening a Collection](#) (page 4-11).
2. Select the archive in the Current Archives list.
3. Click the [Main Archiver Export Screen](#) (page 5-11).
4. Click **Edit** in the **Additional Data** section. The Edit Additional Data Screen is displayed.
5. To export content types, select the **Export Content Configuration Information** check box.
6. To export user data, select the **Export User Configuration Information** check box.
7. Click **OK**.

The configuration information options are displayed in the **Additional Data** section of the Export Data tab.

Adding a Table to an Archive

To add a table to an archive:

1. Click the [Main Archiver Export Screen \(Table\)](#) (page 5-18).
2. Select an archive from the Current Archives list.
3. Click **Add**.

The [Add New/Edit Table Screen](#) (page 5-20) is displayed.

4. Complete the fields as appropriate. These fields are used to export the parent/child relationship in any tables used in schemas.
5. Click **OK**.

The table is added to the Table list on the Table tab.

Editing the Archive Properties of a Table

To edit the archive properties of a table:

1. Click the [Main Archiver Export Screen \(Table\)](#) (page 5-18).
2. Select an archive from the Current Archives list.
3. Select a table from the Table list.
4. Click **Edit**.

The [Add New/Edit Table Screen](#) (page 5-20) is displayed.

5. Edit the fields as appropriate.
6. Click **OK**.

Creating a Table Export Query

To create a query that defines which tables will be exported:

1. Click the [Main Archiver Export Screen \(Table\)](#) (page 5-18).
2. Select a table from the Table list.
3. Click **Edit** in the Export Query section.

The [Edit Export Query \(Table\) Screen](#) (page 5-22) is displayed.

4. Select a metadata field from the **Field** list.

5. Select an **Operator** from the list.
 - The available operators depend on which Field is selected.
 - The available operators map to basic SQL query operators. To use other SQL query operators, create a basic expression and then edit it in the **Custom Query Expression** check box (see step 11).
6. Enter the criteria in the **Value** field.
7. Click **Add**.

The query expression is added to the Query Expression box, and the SQL version of the query expression is displayed in the Custom Query Expression box.

8. To add to the query expression, repeat steps 4 through 7. By default, each part of the expression is added using an AND operator.
9. To update an existing query:
 - a. Select the line to be changed in the Query Expression box.
 - b. Edit the Field, Operator, and Value fields as necessary.
 - c. Click **Update**.

The specified query expression replaces the selected line.

10. To delete a line from the query expression:
 - a. Select the line to be deleted in the Query Expression box.
 - b. Click **Delete**.

The selected line is deleted.

11. To edit the SQL expression directly:
 - a. Select the **Custom Query Expression** check box.
 - b. Edit the text in the Custom Query Expression box. You can use Idoc Script in the query expression. See the *Idoc Script Reference Guide* for more information.



Caution: If you clear the Custom Query Expression check box, the query expression reverts to its original definition; all modifications will be lost.

12. Click **OK**.

The export query is displayed in the Export Query box on the Table tab.

13. To see a list of tables that will be included in the export, click **Preview**.

The [Previewing Export Queries \(Table\) Screen](#) (page 5-24) is displayed.



Note: Although an unlimited number of tables can be exported, a maximum of 100 tables can be displayed in the Content Satisfying the Export Query screen. Use the **Filter** and **Release Date since** features to display subsets of the list as necessary.

14. Review the list to make sure that the export includes the intended revisions.
15. Click **Close**.

Setting Export Options

To set general export options:

1. Open the archive collection. See [Opening a Collection](#) (page 4-11).
2. Select the archive in the Current Archives list.
3. Click the [The Main Archiver Screen](#) (page 2-12).
4. Click **Edit** in the **Export Options** section. The [Edit Export Options Screen](#) (page 5-16) is displayed.
5. Specify whether to replace existing batch files upon export:
 - To delete all existing batch files when the next export is initiated, select the **Replace Existing Export Files** check box.
 - To leave existing batch files in place when the next export is initiated, clear the **Replace Existing Export Files** check box.
6. Specify which files to export:
 - To export the native (*vault*) and web-viewable (*weblayout*) files, select the **Copy Web Content** check box.
 - To export only the native (*vault*) files, clear the **Copy Web Content** check box.
7. Specify whether to export content or not:
 - To export only tables, select the **Export Table Only** check box.
 - To export content items, clear the check box.
8. Click **OK**.

The export options are displayed in the **Export Options** section of the General tab.

Initiating the Export

To manually export content and configuration information:

1. Open Archiver for the content server that contains the files you want to export.
2. Open the archive collection. See [Opening a Collection](#) (page 4-11).
3. Select the archive to export to in the Current Archives list.
4. Select **Actions—Export**.

The [Export Archive Screen](#) (page 5-24) is displayed.



Note: If the Export option is disabled, the archive is being exported automatically. You will need to disable the automatic replication to perform a manual export. See [Chapter 8 \(Replicating Files\)](#) for details.

5. Specify whether to delete the revisions from the content server instance after the export is successfully completed:
 - To delete revisions after export, select the **Delete revisions after successful archive** check box.
 - To leave revisions in the content server after export, clear the **Delete revisions after successful archive** check box.
6. Click **OK**.

The export process is initiated, and the status bar at the bottom of the Archiver screen displays progress messages.

EXPORT INTERFACE SCREENS

The following screens are used during the export process:

- ❖ [Main Archiver Export Screen](#) (page 5-11)
- ❖ [Export Data \(Content\) Screen](#) (page 5-11)
- ❖ [Edit Export Query \(Content\) Screen](#) (page 5-13)
- ❖ [Previewing Export Queries \(Content\) Screen](#) (page 5-17)
- ❖ [Main Archiver Export Screen \(Table\)](#) (page 5-18)
- ❖ [Add New/Edit Table Screen](#) (page 5-20)
- ❖ [Edit Export Query \(Table\) Screen](#) (page 5-22)

- ❖ [Previewing Export Queries \(Table\) Screen](#) (page 5-24)
- ❖ [Export Archive Screen](#) (page 5-24)

Main Archiver Export Screen

The Export Data tab of the Archiver application is used to set the export criteria for content items and tables. To access this function, click the Export Data tab on [The Main Archiver Screen](#) (page 2-12).

Two tabs appear on the main export screen:

Feature	Description
Content tab	Displays the Export Data (Content) Screen (page 5-11).
Table tab	Displays the Main Archiver Export Screen (Table) (page 5-18).

Export Data (Content) Screen

The Content tab is used to set the export criteria for content items. To access this screen, click the **Content** tab on the Main Archiver Export Screen.

Feature	Description
Export Query	

Feature	Description
Export Query field	Shows the export criteria that is used to select which content items will be exported.
Edit button	Displays the Edit Export Query (Content) Screen (page 5-13), which is used to change export criteria.
Preview button	Displays the Previewing Export Queries (Content) Screen (page 5-17) screen, which shows what content will be exported.
Additional Data	
Content Configuration field	Shows whether content types will be exported.
User Configuration field	Shows whether user attributes will be exported.
Edit button	Displays a screen where you can specify whether to export content configuration information or user configuration information.

Edit Export Query (Content) Screen



The Edit Export Query screen is used to create an export query that defines which content items to export. A similar screen is used to create queries for tables ([Edit Export Query \(Table\) Screen](#) (page 5-22)).

Follow these steps to access this screen:

1. Select an archive.
2. Click the [Main Archiver Export Screen](#) (page 5-11) and the Content tab.
3. Click **Edit** in the Export Query section.

Feature	Description
Query Definition	
Field list	The metadata field that is evaluated for each content item. Items matching this field are exported.

Feature	Description
Operator field	<p>Specifies how the Value is evaluated for each content item. The available operators depend on the type of metadata field selected:</p> <ul style="list-style-type: none"> • Is exports content items with the exact value specified. • Is Not exports content items with a different value than the specified value. • Begins With exports content items with the specified value at the beginning of the field. • Contains Word exports content items with the specified value anywhere in the field. • Is Date Before exports content items with dates before the specified value. • Is Date After exports content items with dates after the specified value.
Value field	The value for the specified metadata field. Depending on the option chosen in the Field list, this field can be a text entry field, text entry field with Select button, or list of the available options.
Select button	Displays a list of existing items (such as content items or users), from which you can select a value for the Value field. This button appears only when certain metadata fields are selected.
Add button	Adds the specified export query as a new line in the Query Expression box.
Update button	Replaces the line selected in the Query Expression box with the specified export query.
Query Expression box	Shows the SQL export criteria as specified with the Add or Update buttons.
Delete button	Removes the selected line from the Query Expression box.

Feature	Description
Custom Query Expression check box	<p>Selected—The query expression can be edited directly.</p> <p>Clear—The query expression is limited to the criteria specified in the Field, Operator, and Value fields (described previously).</p> <p> Caution: If you clear the Custom Query Expression check box, the expression reverts to its original definition; all modifications are lost.</p> <p> Note: You can use Idoc Script in the query expression. See the <i>Idoc Script Reference Guide</i> for more information.</p>
Custom Query Expression box	The SQL expression that is evaluated for each content item during export. By default, multiple criteria use the AND operator.
Query Options	
Export Revisions with Release Date later than most recent Export Date check box	<p>Selected—Exports only the revisions that have released since the last export and that meet the export criteria.</p> <p>Clear—Exports all revisions that meet the export criteria.</p>
Allow Export of Published Revisions check box	<p>This check box is for use with Oracle Content Publisher.</p> <p>Selected—Exports all revisions that meet the export criteria.</p> <p>Clear—Does not export revisions that were published to the content server by Oracle Content Publisher.</p>
All Selected Revisions option	Exports all revisions of content items that meet the export criteria.
Latest Revisions option	Exports only the most recent revision of content items that meet the export criteria.
Not Latest Revisions option	Exports all revisions except the most recent for content items that meet the export criteria.

Feature	Description
Single Revision Replication option	Exports the most recent revision of each item that matches the query. See Single Revision Replications (page 8-2) for details about using this option during replications.

Edit Export Options Screen



The Edit Export Options screen is used to specify which copies of the files to export and to specify whether to overwrite existing batch files. To access this screen, select an archive, click the Archiver General tab and click **Edit** in the Export Options section.

Feature	Description
Replace Existing Export Files check box	<p>Selected—Any existing batch files are deleted from the archive when an export is initiated.</p> <p>Clear—Initiating an export adds a new batch file but does not delete the existing batch files.</p>
Copy Web Content check box	<p>Selected— The native (<i>vault</i>) and web-viewable (<i>weblayout</i>) files are exported.</p> <p>Clear—Only the native (<i>vault</i>) files are exported.</p>
Export Table Only check box	<p>Selected— Only the tables are exported. Content items are not exported.</p> <p>Clear— Content items are exported as well as tables that have been defined to be exported.</p>

Previewing Export Queries (Content) Screen



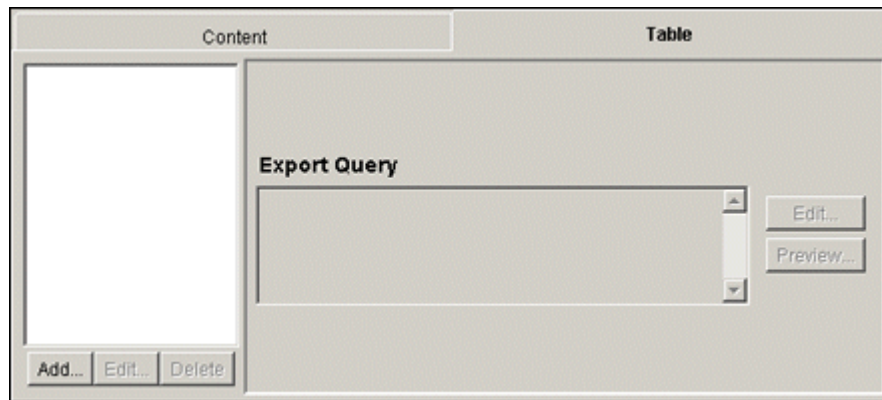
The Content Satisfying the Export Query screen is used to view a list of revisions that meet the export criteria. Follow these steps to access this screen:

1. Select an archive.
2. Click the [Main Archiver Export Screen](#) (page 5-11) and the **Content** tab.
3. Click **Preview** in the Export Query section.

Feature	Description
Export Query field	Shows the SQL query expression created using the Edit Export Query (Content) Screen (page 5-13).
Use Filter check box	Select this check box to use a filter to narrow the Content list.

Feature	Description
Define Filter button	Displays the Define Filter Screen, where you can select items for inclusion in the view.
Show Columns button	Displays the Show Columns Screen, where you can select the columns to be displayed.
Release Date Since check box and field	Limits the revisions displayed in the Content list by their release dates.
Content list	<p>Shows the revisions in the content server repository that match the filter settings.</p> <ul style="list-style-type: none"> • A maximum of 100 revisions can be displayed in this list; however, all revisions that satisfy the export query will be exported. • Double-clicking a revision displays the Information Screen for that revision.

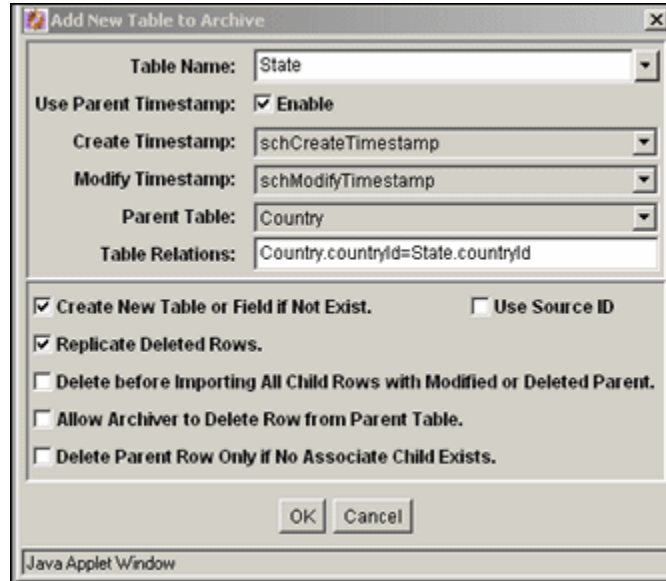
Main Archiver Export Screen (Table)



The Table tab on the Export Data tab of the Archiver application is used to add and define the characteristics for new tables and edit existing tables in the selected archive. To access this screen, click the [Main Archiver Export Screen](#) (page 5-11), and click the Table tab.

Feature	Description
Tables	
Table list	Lists the tables in the selected archive.
Add button	Displays the Add New/Edit Table Screen (page 5-20).
Edit button	Displays the Edit Archive Properties screen. See Add New/Edit Table Screen (page 5-20).
Delete button	Deletes the selected table from the archive.
Export Query	
Export Query field	Shows the export criteria that is used to select which tables will be exported.
Edit button	Displays the Edit Export Query (Table) Screen (page 5-22).
Preview button	Displays the Previewing Export Queries (Table) Screen (page 5-24).

Add New/Edit Table Screen



The Add New/Edit Table screen is used to define the export characteristics of a table and add it to the selected export archive.

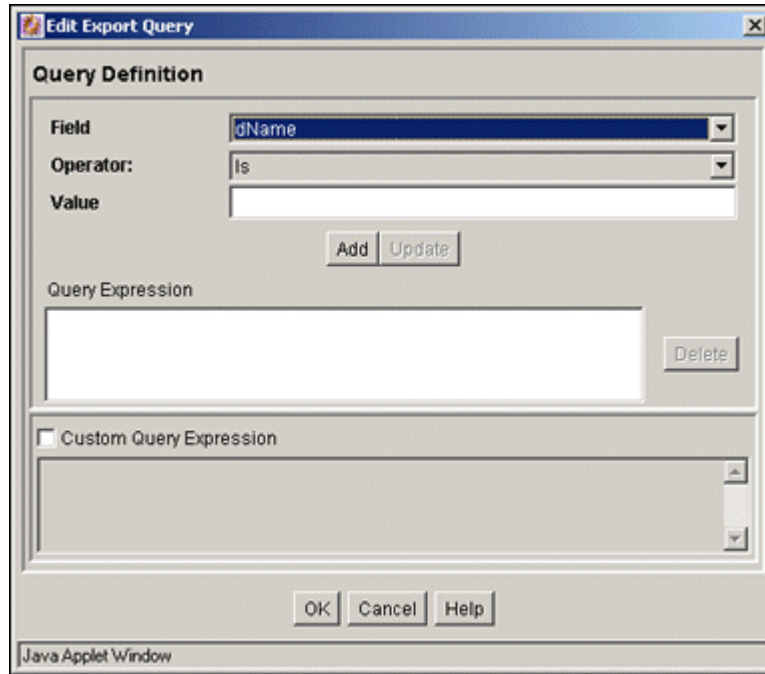
Follow these steps to access this screen:

1. Click the [Main Archiver Export Screen](#) (page 5-11).
2. Select an archive from the Current Archives list and click the **Tables** tab.
3. Click the Table list **Add** button.

Feature	Description
Table Name list	Lists the available database tables that can be added to the selected archive.
Use Parent Timestamp check box	Selected — Use the parent table’s timestamp to determine if this table will be exported. Clear — Use the current timestamp to determine if this table will be exported.
Create Timestamp list	Lists the possible columns that store the creation timestamp when the table row is created.

Feature	Description
Modify Timestamp list	Lists the possible columns that store the modification timestamp when the table row is modified.
Parent Table list	Lists parent table selections.
Table Relations field	Used to specify the parent / child table relationship that determines the information to be exported.
Create New Table or Field if Not Exist check box	<p>Selected— Creates the specified table or field if it does not currently exist.</p> <p>Clear— Does not create the table or field.</p>
Use Source ID check box	<p>Selected— Only table rows that match in multiple instances are exported.</p> <p>Clear— Table rows are exported regardless of their matching status between instances.</p>
Replicate Deleted Rows check box	<p>Selected— The deleted source table rows are also deleted in the target table.</p> <p>Clear— Rows are not deleted in the target table.</p>
Delete before Importing All Child Rows with Modified or Deleted Parent check box	<p>Selected— Delete the rows from the importing child table if the corresponding rows in the parent table have been deleted or modified.</p> <p>Clear— Rows are not deleted in the child table before importing.</p>
Allow Archiver to Delete Row from Parent Table check box	<p>Selected— Delete the rows from the parent table if the corresponding rows in the exported child table have been deleted.</p> <p>Clear— Rows are not deleted from the parent table.</p>
Delete Parent Row Only if No Associate Child Exists check box	<p>Selected— Delete the rows from the parent table only if a child row does not exist.</p> <p>Clear— Rows are not deleted from the parent table.</p>

Edit Export Query (Table) Screen





The Edit Export Query screen is used to create an export query that defines which tables to export. This is similar to the screen used to create export queries for content ([Edit Export Query \(Content\) Screen](#) (page 5-13)).

Follow these steps to access this screen:

1. Select an archive
2. Click the [Main Archiver Export Screen](#) (page 5-11) and the Table tab.
3. Click **Edit** in the Export Query section.

Feature	Description
Field list	The metadata field that will be evaluated for each table.

Feature	Description
Operator field	<p>Specifies how the Value will be evaluated for each table. The available operators depend on the type of metadata field selected:</p> <ul style="list-style-type: none"> • Is exports tables with the exact value specified. • Is Not exports tables with a different value than the specified value. • Begins With exports tables with the specified value at the beginning of the field. • Contains Word exports tables with the specified value anywhere in the field. • Is Date Before exports tables with dates before the specified value. • Is Date After exports tables with dates after the specified value.
Value field	The value for the specified metadata field.
Add button	Adds the specified export query as a new line in the Query Expression box.
Update button	Replaces the line selected in the Query Expression box with the specified export query.
Query Expression field	Shows the export criteria.
Delete button	Removes the selected line from the Query Expression box.

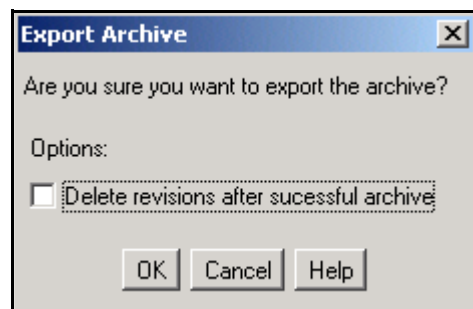
Feature	Description
Custom Query Expression check box	<p>Selected—The query expression can be edited directly.</p> <p>Clear—The query expression is limited to the criteria specified in the Field, Operator, and Value fields.</p> <p> Caution: If you clear the Custom Query Expression check box, the expression reverts to its original definition; all modifications are lost.</p> <p> Note: You can use Idoc Script in the query expression. See the <i>Idoc Script Reference Guide</i> for more information.</p>
Custom Query Expression field	The SQL expression that will be evaluated for each table during export. By default, multiple criteria use the AND operator.

Previewing Export Queries (Table) Screen

The Content Satisfying the Export Query screen is used to view a list of tables that meet the export criteria. The fields, buttons, and check boxes on this screen are identical to those on the screen used to view a list of revisions meeting selected export criteria.

To view and read the field descriptions, see [Previewing Export Queries \(Content\) Screen](#) (page 5-17).

Export Archive Screen



The Export Archive screen is used to initiate an export and specify whether to delete the exported files. To access this screen, select **Actions—Export** from the Archiver menu bar.

Feature	Description
Delete revisions after successful archive check box	Selected —Deletes exported revisions from the content server instance upon successful export. Clear —Exported revisions are not deleted from the content server.

IMPORTING DATA

Archives can be imported according to specified rules and at specified times. The data in the files can be mapped to fields in the receiving content server but care should be taken that the correct rules are applied during import.

This chapter covers these topics:

Concepts

- ❖ [Importing Files](#) (page 6-2)
- ❖ [The Import Process](#) (page 6-9)

Tasks

- ❖ [Importing Archived Data Manually](#) (page 6-10)
- ❖ [Setting Value Maps](#) (page 6-12)
- ❖ [Importing an Individual Revision](#) (page 6-15)
- ❖ [Initiating the Import](#) (page 6-15)

Interface

- ❖ [Import Maps Main Screen](#) (page 6-16)
- ❖ [Import Maps \(Content\) Screen](#) (page 6-17)
- ❖ [Edit Field Map/Edit Value Map Screen](#) (page 6-18)
- ❖ [Browse for Fields/Value Screen](#) (page 6-20)

- ❖ [Import Maps \(Table\) Screen](#) (page 6-21)
- ❖ [Edit Archive Properties on Table Screen](#) (page 6-22)
- ❖ [Edit Import Options \(Select Rules\) Screen](#) (page 6-23)
- ❖ [Import Archive Screen](#) (page 6-24)

IMPORTING FILES

The Import function is used to retrieve files and content server information from an exported archive. Importing is typically used to obtain a copy of content from another content server or to restore data that has been in storage.

The content server instance to which you are importing must have the same metadata fields, security groups, and accounts as the instance that the archive was exported from. Errors can result if there are mismatches.



Caution: Do not use Archiver as your primary method of disaster recovery; use standard backup systems for the database and file system.



Note: Imported revisions will not enter a workflow upon import, even if they meet the criteria for an active workflow.

Before beginning the import process, you need to consider the following points:

- ❖ Determine the method to be used, either manual or automatic.
- ❖ Determine the rules to be used for updating.
- ❖ Determine the mapping and import options.
- ❖ Test your process by importing selected revisions.

Import Uses

Typical uses for the Import function include:

- ❖ Placing data archived from an Intranet on an Extranet for vendor or customer viewing.
- ❖ Changing metadata for a large number of content items. For example, if an employee leaves the organization, you could export all of their content items and then import them with another user specified as the Author.

- ❖ Restoring content that was inadvertently deleted or configuration information that was inadvertently changed.
- ❖ Copying files, content types, and user attributes from a development content server archive to a production instance.

Import Methods

You can import archives in the following ways:

- ❖ **Manual**—A one-time import initiated from Archiver by an administrator.
- ❖ **Automatic (Replication)**—Import from a local archive is initiated automatically, about once a minute.

See [The Import Process](#) (page 6-9) and [Chapter 8 \(Replicating Files\)](#) for more information.

Import Rules

An import rule defines how revisions are added, replaced, or deleted during import.

- ❖ During import, Archiver compares each revision being imported with the existing revisions in the importing content server. The import rule specifies which action to take (add, replace, delete, or ignore), depending on comparison of the following information:
 - Content ID
 - Original content server
 - Revision number
 - Release date
- ❖ Only one import rule can be selected for each import of an archive.
- ❖ The following import rules can be implemented:
 - [Update Import Rule](#) (page 6-4)
 - [Insert Revision Import Rule](#) (page 6-5)
 - [Insert Create Import Rule](#) (page 6-6)
 - [Delete Revision Import Rule](#) (page 6-7)
 - [Delete All Revisions Import Rule](#) (page 6-8)

Update Import Rule

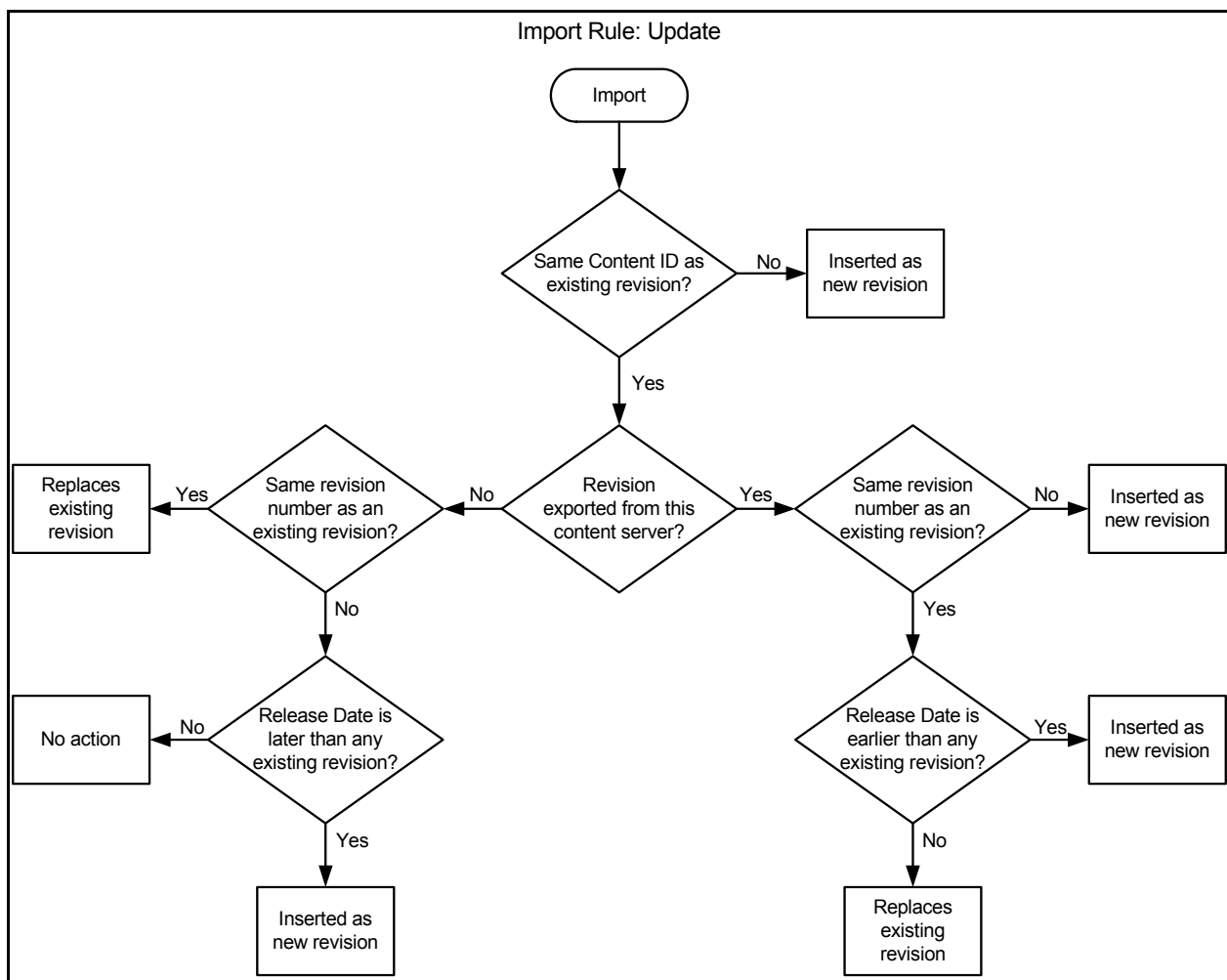
Use the Update import rule to replace existing revisions and insert new revisions.



Caution: The Update import rule will replace existing revisions without saving the existing files. **Be extremely careful when importing so you do not accidentally replace content you meant to keep.**

- ❖ If an imported revision has a different Content ID (*dDocName*) than any existing revision, the imported revision is inserted as a new revision.
- ❖ If an imported revision has the same Content ID (*dDocName*) as an existing revision, the imported revision is inserted, ignored, or replaces the latest existing revision.

Figure 6-1 Import rules

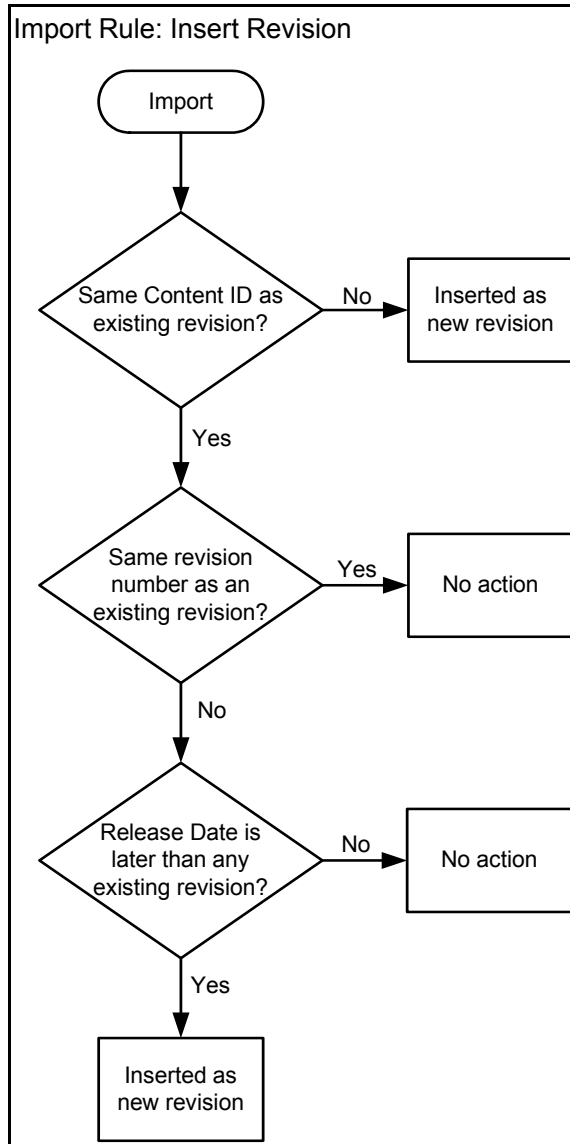


Insert Revision Import Rule

The Insert Revision import rule imports only revisions that have both the most recent revision number and the most recent release date.

- ❖ If an imported revision has a different Content ID (*dDocName*) than any existing revision, the imported revision is inserted as a new revision.
- ❖ If an imported revision has the same Content ID (*dDocName*) as an existing revision, but has a different Revision ID (*dRevisionID*) than any existing revision and a later release date than that of the latest existing revision, the imported revision is inserted as a new revision with a new revision label.

Figure 6-2 Import rule: insert revision



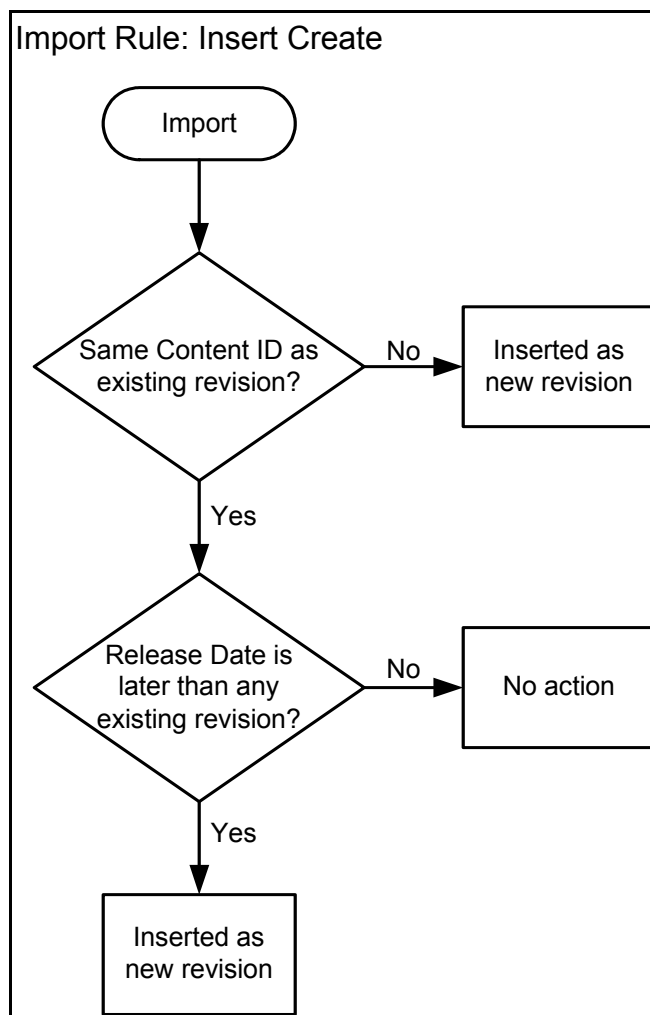
Insert Create Import Rule

The Insert Create import rule imports only revisions that have the most recent release date, regardless of the revision number.

- ❖ If an imported revision has a different Content ID (*dDocName*) than any existing revision, the imported revision is inserted as a new revision.

- ❖ If an imported revision has the same Content ID (*dDocName*) as an existing revision, and the release date of the imported revision is later than that of the latest existing revision, the imported revision is inserted as a new revision with a new revision label.

Table 6-1 Import rule: insert create

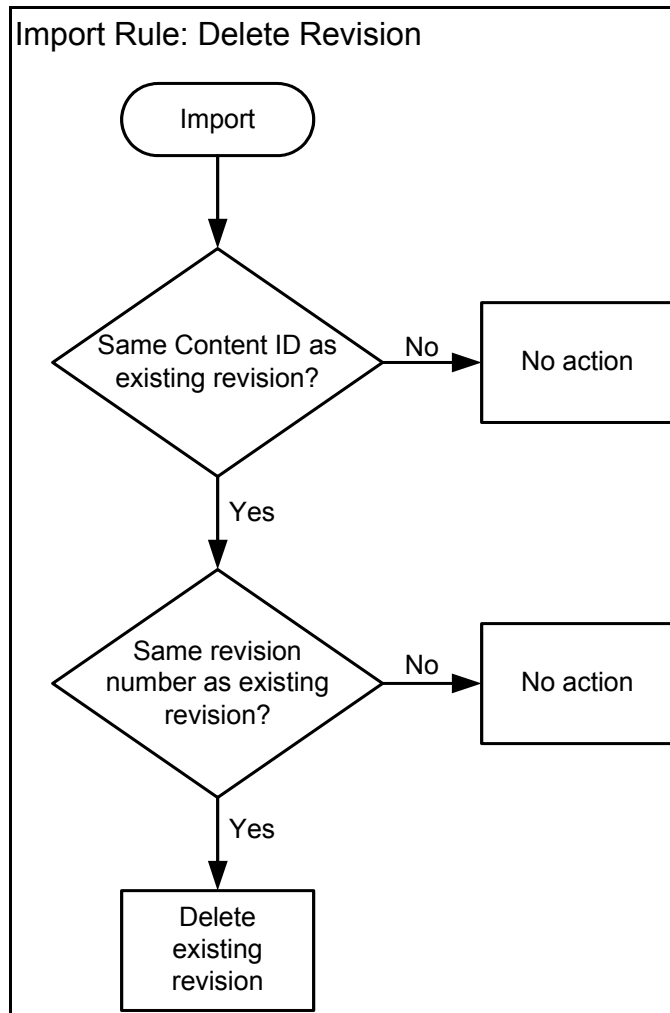


Delete Revision Import Rule

Use the Delete Revision import rule to delete individual revisions.

- ❖ If an imported revision has the same Content ID (*dDocName*) and Revision ID (*dRevisionID*) as an existing revision, the existing revision is deleted.

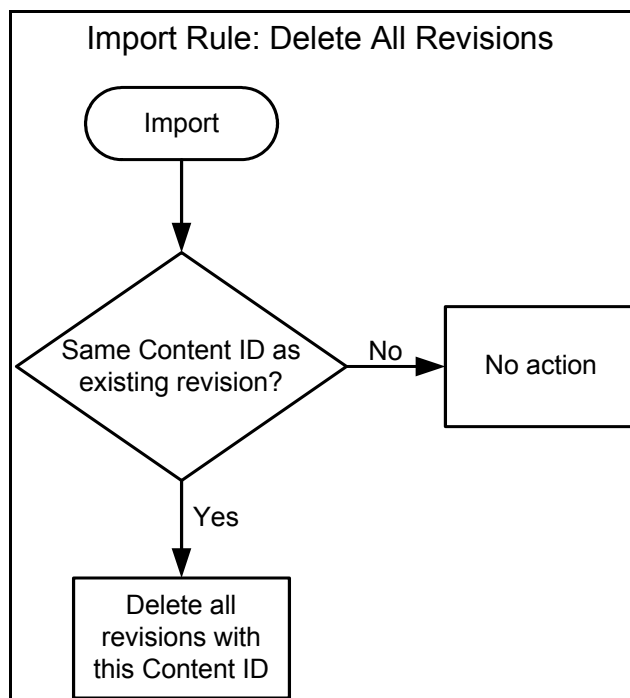
Figure 6-3 Import rule: delete revision



Delete All Revisions Import Rule

Use the Delete All Revisions import rule to delete all revisions of a content item.

- ❖ If an imported revision has the same Content ID (*dDocName*) as any existing revision, all existing revisions with that Content ID are deleted.

Figure 6-4 Import rule: delete all revisions

THE IMPORT PROCESS

This section describes the import process and the following tasks:

- ❖ [Importing Archived Data Manually](#) (page 6-10)
- ❖ [Setting Value Maps](#) (page 6-12)
- ❖ [Importing an Individual Revision](#) (page 6-15)
- ❖ [Initiating the Import](#) (page 6-15)



Tech Tip: To determine which archive contains the data you want to retrieve, you can prepare an Archive History report using the Web Layout Editor.

You can also examine the files generated by the archive at the file system level, but preparing a report is more efficient if you frequently need to find archived data.



Important: If you are using Sybase and you want to import an archive, you need to perform the following tasks:

1. Make sure you are logged into Content Server as an administrator.
2. Click Administration in the navigation menu on the left.
3. On the Administration Applets page, click Repository Manager.
4. Open the Indexer tab.
5. In the Automatic Update Cycle section, click Configure.
6. Make sure the Indexer Auto Updates check box is cleared.
7. Close Repository Manager.
8. Use Archiver to import the archive.
9. Open Repository Manager, and select the Indexer Auto Updates check box again.

Importing Archived Data Manually

1. In the Current Archives list, select the archive from which to retrieve data.
2. Review the batch files in the archive. If necessary, remove revisions from the batch files. See [Removing Revisions from a Batch File](#) (page 4-14).
3. If you want to change metadata fields or values during the import, set up the field and value mappings. See [Setting Field Maps](#) (page 6-11) and [Setting Value Maps](#) (page 6-12).
4. Set the general import options. See [Setting Import Options](#) (page 6-14).
5. Test the import mappings and rules on a few individual revisions. See [Importing an Individual Revision](#) (page 6-15).
6. Initiate the import. See [Initiating the Import](#) (page 6-15).

Setting Field Maps

Field maps specify how metadata values are copied from one metadata field to another during import. If you do not want to copy metadata values, do not specify any field maps.

To set up field maps:

1. Open the archive collection. See [Opening a Collection](#) (page 4-11).
2. Select the archive in the Current Archives list.
3. Click the [Import Maps Main Screen](#) (page 6-16).

4. Click **Edit** in the Field Maps section.

The [Edit Field Map/Edit Value Map Screen](#) (page 6-18) is displayed.

5. Click **Browse For Fields**.

The [Browse for Fields/Value Screen](#) (page 6-20) is displayed.

6. Select a source for the list of available metadata fields:

- To retrieve the metadata fields from the local content server, select **Local System**.
- To retrieve the metadata fields from a batch file, select **Batch** and select a batch file from the list.

7. Click **OK**.

The Export Field option list is populated with the metadata fields that are associated with the content server or the selected batch file.

8. In the **Export Field** list, select the metadata field from which you want to copy metadata.

The selected metadata field is displayed in the Export Field. (You can also edit this field directly. Make sure to use the internal field name, such as *dDocAuthor* or *xComments*.)

9. In the **Target Field** list, select the metadata field you want the Export metadata to be copied to.

10. Click **Add**.

The mapping expression is added to the Field Maps box.

11. To add to the mapping expression, repeat steps 8 through 10.

12. To update an existing mapping expression:

- a. Select the line to be changed in the Field Maps box.

- b. Edit the Export Field and Target Field as necessary.
- c. Click **Update**.

The specified mapping expression replaces the selected line.

13. To delete a line from the mapping expression:
 - a. Select the line to be deleted in the Field Maps box.
 - b. Click **Delete**.

The selected line is deleted.

14. Click **OK**.

During import, the values from the Export field replace any existing values in the Target field.

15. To test the results of your field maps, import a few individual revisions from an archive. See [Importing an Individual Revision](#) (page 6-15).

Setting Value Maps

Value maps specify how specific metadata values are to be changed during import. If you do not want to change metadata values, do not specify any value maps.

To set up value maps:

1. Open the archive collection. See [Opening a Collection](#) (page 4-11).
2. Select the archive in the Current Archives list.
3. Click the [Import Maps Main Screen](#) (page 6-16).

4. Click **Edit** in the Value Maps section.

The [Edit Field Map/Edit Value Map Screen](#) (page 6-18) is displayed.

5. To change all metadata values for a particular field, select the **All** check box. Continue with step 11.

6. To change a specific metadata value, click **Browse For Values**.

The [Browse for Fields/Value Screen](#) (page 6-20) is displayed.

7. Select a batch file from the **From Batch File** list.
8. Select a metadata field from the **From Field** list.
9. Click **OK**.

The Input Value option list is populated with the values that are associated with the selected metadata field in the selected batch file.

10. In the **Input Value** list, select the metadata value to be changed.
11. In the **Field** list, select the metadata field to be changed.
12. In the **Output Value** field, enter the new metadata value.
 - You can use Idoc Script in the output value. For example, to set the expiration date one week in the future for all imported revisions, you could use `<dateCurrent (7) $>`. See the *Idoc Script Reference Guide* for more information.
 - To delete all values from the input metadata field, leave the output value blank.
13. Click **Add**.

The mapping expression is added to the Value Maps box.

14. To add to the mapping expression, repeat steps 5 through 13.
15. To update an existing mapping expression:
 - a. Select the line to be changed in the Value Maps box.
 - b. Edit the Input Value, Field, and Target Value as necessary.
 - c. Click **Update**.

The specified mapping expression replaces the selected line.

16. To delete a line from the mapping expression:
 - a. Select the line to be deleted in the Value Maps box.
 - b. Click **Delete**.

The selected line is deleted.

17. Click **OK**.

During import, the specified Input Values in the specified metadata Fields will be replaced with the Target Values.

18. To test the results of your value maps, import a few individual revisions from an archive. See [Importing an Individual Revision](#) (page 6-15).

Setting Import Options

To set general import options:

1. Open the archive collection. See [Opening a Collection](#) (page 4-11).
2. Select the archive in the Current Archives list.
3. Click the [Archiver \(General Tab\)](#) (page 4-16).
4. Click **Edit** in the **Import Options** section.

The [Edit Import Options \(Select Rules\) Screen](#) (page 6-23) is displayed.

5. Select an option in the **Override Import Rules** list to specify how existing revisions are added, replaced, or deleted during import. See [Import Rules](#) (page 6-3) for detailed descriptions.



Caution: The *Update* import rule will replace existing revisions without saving the existing files. **Be extremely careful when importing so that you do not accidentally replace content you meant to keep.**

6. Specify whether option list values are validated during import:
 - To import only revisions with valid option list values (validated option lists only), select the **Import only revisions with valid option list values** check box.
 - To skip option list validation, clear the **Import only revisions with valid option list values** check box.



Tech Tip: The **Import only revisions with valid option list values** check box applies to all validated option lists. If you want to validate some option list fields but not all of them, you can change the **Option List Type** in the Configuration Manager. Use *Select List Validated* for option lists you want to validate; use *Select List Not Validated* for option lists you do not want to validate.

7. Specify whether to recalculate times in metadata date fields to reflect the time zone of the target content server:
 - To recalculate times, select the **Translate the dates to the current system time zone** check box.

For example, if the time zone of the source (export) content server is Central Standard Time and the time zone of the target (import) content server is Eastern Standard Time, the release times, create times, expiration times, and any custom times will be changed to one hour later.

- To leave times unchanged, clear the **Translate the dates to the current system time zone** check box.
8. Click **OK**.
 9. To test the results of your import options, import a few individual revisions from an archive. See [Importing an Individual Revision](#) (page 6-15).

Importing an Individual Revision

To import a specific revision:



Tech Tip: Before importing an entire batch file, use this procedure to import a few individual revisions to test the results of your import maps and rules.

1. Open the archive collection. See [Opening a Collection](#) (page 4-11).
2. Select the archive in the Current Archives list.
3. On the [Archiver \(General Tab\)](#) (page 4-16), click **View Batch Files**.
The [View Batch Files Screen](#) (page 4-24) is displayed.
4. Select the batch file that contains the file you want to import.
5. Click **Edit**.
The [View Exported Content Items Screen](#) (page 4-25) is displayed.
6. Use the **Filter** feature and the navigation buttons to display the revision to be imported.
7. Select the revision.
8. Click **Import**.

If the revision was imported successfully, a confirmation message is displayed.

Initiating the Import

To manually import content and configuration information:

1. Open Archiver for the content server that you want to import to.
2. Open the archive collection that you want to import from. (This collection must be accessible through the file system.) See [Opening a Collection](#) (page 4-11).
3. Select the archive in the Current Archives list.

4. Select **Actions—Import**.

The [Import Archive Screen](#) (page 6-24) is displayed.

5. Specify the information to be imported:

- To import content, select the **Import Batched Revisions** check box.
- To import content and tables, select the **Import Tables** check box.



Note: The User Configuration and Content Configuration options are available only if the selected archive includes this information (*users.hda* or *doctypes.hda* file).

6. Click **OK**.

The import process is initiated, and the status bar at the bottom of the Archiver screen displays progress messages.

IMPORT INTERFACE SCREENS

The following screens are used during the import process:

- ❖ [Import Maps Main Screen](#) (page 6-16)
- ❖ [Import Maps \(Content\) Screen](#) (page 6-17)
- ❖ [Edit Field Map/Edit Value Map Screen](#) (page 6-18)
- ❖ [Browse for Fields/Value Screen](#) (page 6-20)
- ❖ [Import Maps \(Table\) Screen](#) (page 6-21)
- ❖ [Edit Archive Properties on Table Screen](#) (page 6-22)
- ❖ [Edit Import Options \(Select Rules\) Screen](#) (page 6-23)
- ❖ [Import Archive Screen](#) (page 6-24)

Import Maps Main Screen

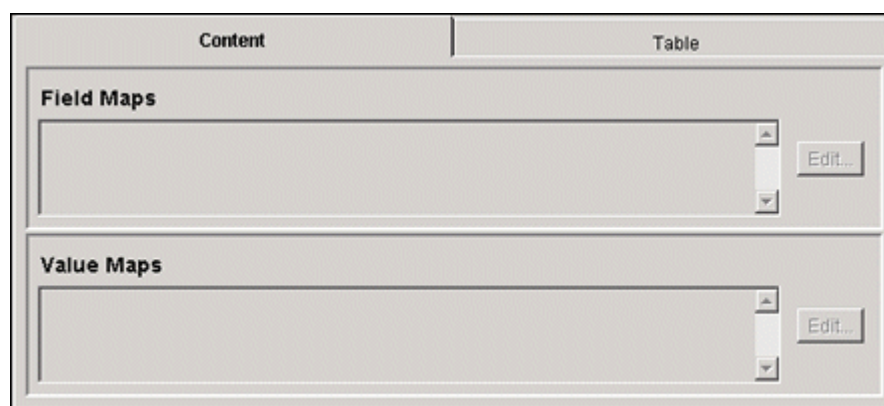
“Mapping” determines how metadata fields on an exporting and importing content server relate to each other.

The Import Maps tab of the Archiver application is used to configure metadata field and value mappings to import content items and tables. To access this tab, click the tab on [The Main Archiver Screen](#) (page 2-12).

Two tabs appear on the main mapping screen:

Feature	Description
Content tab	Displays the Import Maps (Content) Screen (page 6-17).
Table tab	Displays the Import Maps (Table) Screen (page 6-21).

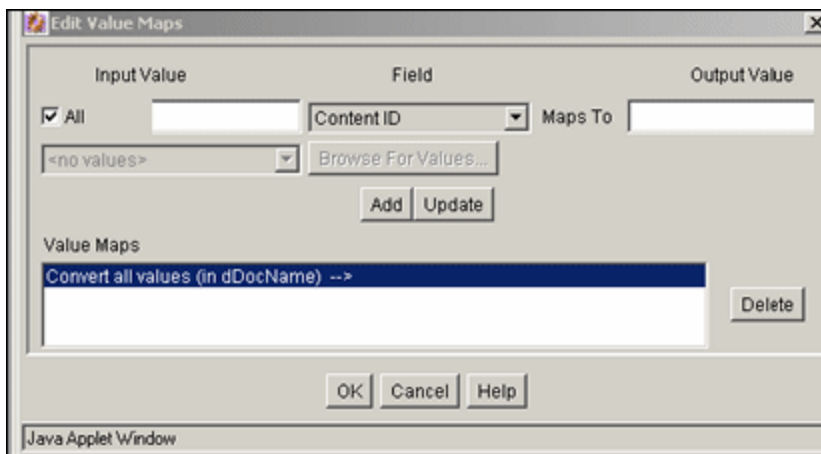
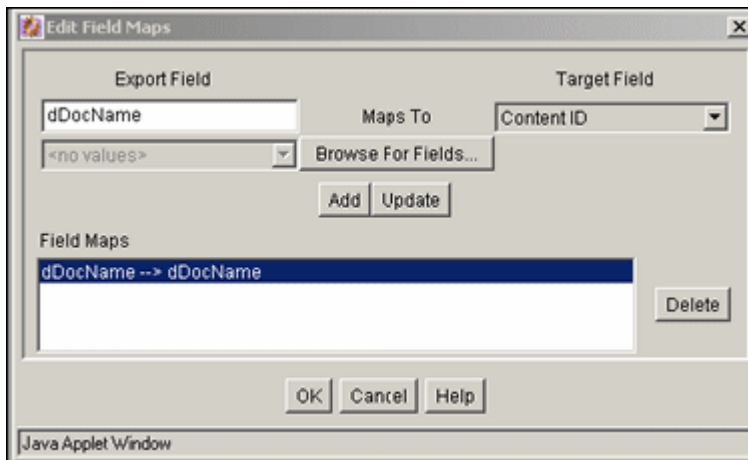
Import Maps (Content) Screen



The Content tab on the Import Maps screen is used to set the import criteria for content items. To access this screen, click the **Content** tab on the Import Maps Main Screen.

Feature	Description
Field Maps box	Shows the metadata field mapping expression.
Edit button	Displays the Edit Field Map/Edit Value Map Screen (page 6-18).
Value Maps box	Shows the metadata value mapping expression.
Edit button	Displays the Edit Field Map/Edit Value Map Screen (page 6-18).

Edit Field Map/Edit Value Map Screen



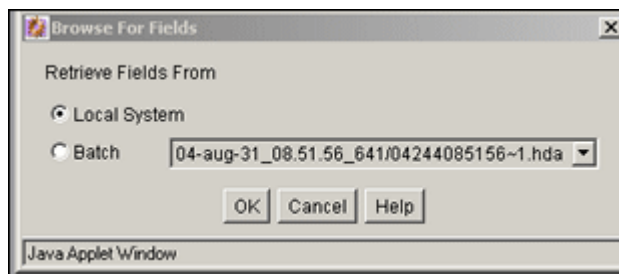
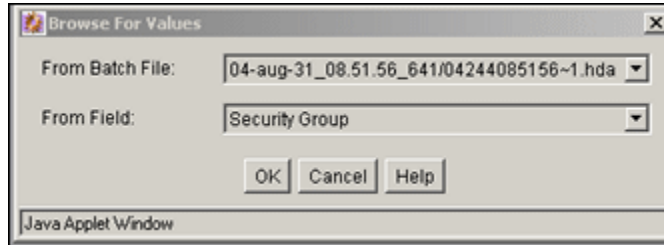
The Edit Field Map/Edit Value Map screen is used to set how fields and values are copied (mapped) from one metadata field to another during import.

Follow these steps to access this screen:

1. Click the [Import Maps Main Screen](#) (page 6-16)
2. Select an archive from the Current Archives list
3. Click the [Import Maps \(Content\) Screen](#) (page 6-17) and click **Edit** in the Field Maps section or the Value Maps section.

Feature	Description
“All” checkbox	On the Edit Value Maps Screen, if the “all” checkbox is selected, the specified Field will be changed to the Output Value for all imported revisions.
Export Field/Input Value	The metadata field that contains the data to be copied to a different field during import or the metadata value to be changed when mapping values. Use the internal field name, such as <i>dDocAuthor</i> or <i>xComments</i> .
Export Field/Input Value list	Enables you to select the Export Field or Input Value from a list of existing metadata fields. A source must be selected from the Browse for Fields/Value Screen (page 6-20) for options to appear in this list.
Browse For Fields/Browse for Values button	Displays the Browse for Fields/Value Screen (page 6-20).
“in” Field	On the Edit Value Maps Screen, an additional field appears between Input Value and Output Value. Select the field where the metadata should be changed from the pull-down list.
Target Field/Output Value	The metadata field that the archived metadata will be copied to during import. The list includes all metadata fields in the local content server.
Add button	Adds the specified mapping expression to the Field Maps box.
Update button	Replaces the mapping expression selected in the Field Maps box with the specified mapping expression.
Field MapsValue Maps box	Shows the mapping expressions.
Delete button	Deletes the selected mapping expression from the Field Maps box.

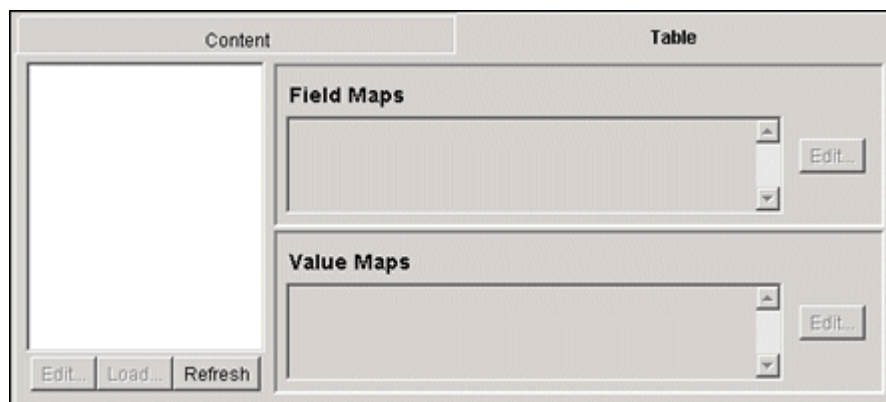
Browse for Fields/Value Screen



The Browse for Fields/Value screen is used to specify whether to retrieve a list of metadata fields from the local content server or from a specific batch file. To access this screen, click **Browse for Fields** or **Browse for Value** on the [Edit Field Map/Edit Value Map Screen](#) (page 6-18).

Feature	Description
From Batch File list	On the Browse for Values screen, selecting a batch file retrieves the list of metadata fields defined in that batch file.
From Field list	On the Browse for Values screen, selecting a field retrieves a list of metadata values defined for that field in the batch file.
Local System option	Retrieves a list of metadata fields from the local content server.
Batch option	Retrieves a list of metadata fields from the selected batch file.

Import Maps (Table) Screen



The Table tab on the Import Maps screen is used to add and define the field and value maps for importing tables. To access this screen, click the **Table** tab on the [Import Maps Main Screen](#) (page 6-16).

Feature	Description
Archive file list	Provides a tree-view list of archive files.
Edit button	Displays the Edit Archive Properties on Table Screen (page 6-22). The configuration settings on this screen that display after clicking the Edit button are the global configurations. The settings on the top section of the screen cannot be edited. Changes to the global settings on the bottom section are implemented after clicking OK. Changes made using the Load button can override these changes.
Load button	Displays the Edit Archive Properties on Table Screen (page 6-22). The configuration settings on this screen that display after clicking the Load button are the configuration settings defined when the archive was created. The settings on the top section of the screen cannot be edited. Changes to the settings on the bottom section are implemented after clicking OK. These changes will override the changes made using the Edit button.

Feature	Description
Refresh button	Used to update the current archive file list.
Field Maps box	Shows the metadata field mapping expression.
Edit button	Displays the Edit Field Map/Edit Value Map Screen (page 6-18).
Value Maps box	Shows the metadata value mapping expression.
Edit button	Displays the Edit Field Map/Edit Value Map Screen (page 6-18).

Edit Archive Properties on Table Screen

The Edit Archive Properties screen is used to edit the original check box values assigned to the table when it was created. The fields in the top section are no longer editable. Only the configuration settings in the lower section can be changed. This screen displays after clicking both the **Edit** and **Load** buttons associated with the archive file list section on the Import Maps Table tab screen.

The configuration settings are different depending on which button was clicked to display the screen. The settings that are displayed after clicking the **Edit** button are the global configurations and the settings that display after clicking the **Load** button are those that were defined when the archive was created. Changes made using the Edit-generated screen can be overridden with changes made using the Load-generated screen.

The fields and check boxes on this screen are identical to those on the screen used to add a table to an archive. To view field descriptions see the [Add New/Edit Table Screen](#) (page 5-20).

Follow these steps to access this screen:

1. Click the [Import Maps Main Screen](#) (page 6-16).
2. Select an archive from the Current Archives list.
3. Click the [Import Maps \(Table\) Screen](#) (page 6-21).
4. Click the Table list **Edit** button.

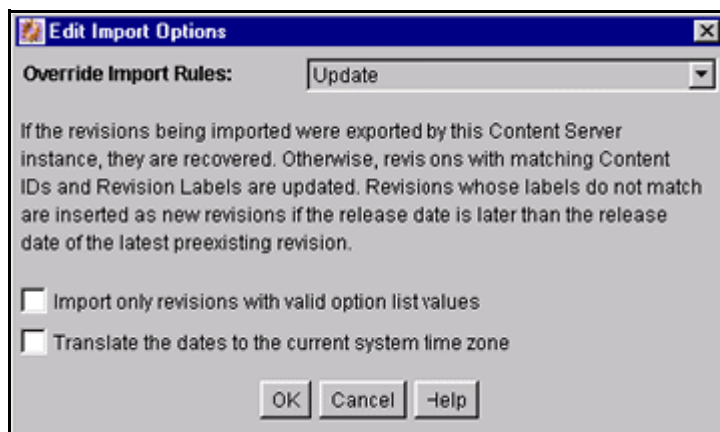
Screens similar to those used to edit content appear:

- ❖ The Edit Field Maps screen is used to set up how values will be copied from one metadata field to another during the import of tables. The fields and buttons on this


screen are identical to those on the screen used to set the metadata mapping for imported content items. See [Edit Field Map/Edit Value Map Screen](#) (page 6-18).

- ❖ The Browse for Fields screen is used to specify whether to retrieve a list of metadata fields from the local content server or from a specific batch file. The fields on this screen are identical to those on the same screen associated with the Import Maps Content tab. See [Browse for Fields/Value Screen](#) (page 6-20).
- ❖ The Edit Value Maps screen is used to set up how metadata values will be changed (mapped) during the import of tables. The fields and buttons on this screen are identical to those on the screen used to set the metadata values for imported content items. See [Edit Field Map/Edit Value Map Screen](#) (page 6-18).
- ❖ The Browse for Values screen is used to select metadata values to retrieve from a batch file. The fields on this screen are identical to those on the same screen associated with the Import Maps Content tab. See [Browse for Fields/Value Screen](#) (page 6-20).

Edit Import Options (Select Rules) Screen



The Edit Import Options screen is used to specify how revisions are replaced, added, or deleted during import. To access this screen, click **Edit** in the Import Options section of the [Archiver \(General Tab\)](#) (page 4-16).

Feature	Description
Override Import Rules list	<p>Select the rule that defines how revisions are replaced, added, or deleted during import. Selecting an option displays a description of the import rule. See also Import Rules (page 6-3).</p> <p> Caution: The <i>Update</i> import rule will replace existing revisions without saving the existing files. Be extremely careful when importing so that you do not accidentally replace content you meant to keep.</p>
Import only revisions with valid option list values check box	<p>Selected—Values in validated option lists are checked, and only revisions with valid option list values will be imported.</p> <p>Clear—Option list values are not validated during import.</p>
Translate the dates to the current system time zone check box	<p>Selected—Times in metadata date fields are recalculated to reflect the time zone of the target (import) content server.</p> <p>Clear—Times in metadata date fields remain unchanged during import.</p>

Import Archive Screen



The Import Archive screen is used to initiate an import and to specify what information to import. To access this screen, select **Actions—Import** from the Archiver menu bar.

Feature	Description
Import Batched Revisions check box	Selected —Imports content item revisions. Clear —Does not import content item revisions.
Import Tables check box	Selected — Imports content item revisions and tables in an archive that contains both. Clear — Does not import the tables in an archive that contains both content item revisions and tables.

TRANSFERRING FILES

The Transfer function is used to move or copy content from one content server to another over sockets.

This chapter discusses these topics:

Concepts

- ❖ [File Transfer Overview](#) (page 7-2)
- ❖ [Transfer Types](#) (page 7-4)
- ❖ [Transferring Batch Files](#) (page 7-6)

Tasks

- ❖ [Making an Archive Targetable](#) (page 7-8)
- ❖ [Defining an Outgoing Transfer Provider](#) (page 7-9)
- ❖ [Setting a Transfer Destination \(Target\)](#) (page 7-10)
- ❖ [Initiating a Manual Transfer](#) (page 7-10)
- ❖ [Deleting a Transfer](#) (page 7-11)

Interface

- ❖ [Archive Collections Screen](#) (page 7-14)
- ❖ [Transfer Options Screen](#) (page 7-13)
- ❖ [Archive Collections Screen](#) (page 7-14)

FILE TRANSFER OVERVIEW

You can use the Transfer function to transfer files between content servers on a shared file system, but transfers *do not require* a shared file system. Transferring files between non-shared file systems requires an outgoing provider on the source content server instance.

Transfers will be successful only between Content Server 4.5 or newer systems.



Caution: Archiver cannot be used to move or copy data between two instances that share the same content server instance name (*IDC_Name*). To do so will corrupt the data on the target system.

Transfer Uses

Typical uses for the Transfer function include:

- ❖ Exporting and importing over a firewall.



Note: To transfer across a firewall, you might need to configure the firewall to permit the outgoing provider's socket to pass through it.

- ❖ Transferring content between content server instances in different physical locations (buildings, cities, or countries).
- ❖ Transferring content between content server instances using a shared drive. (A transfer over a file system share can handle large archives better than a socket transfer.)
- ❖ Avoiding the need to build an FTP or HTTP interface to move files from one file system to another.
- ❖ Combining the batch files from two archives into a single archive.

Transfer Methods

You can transfer files in the following ways:

- ❖ **Manual Transfer**—A one-time transfer initiated from Archiver by an administrator. This *copies* an archive to another archive.
- ❖ **Automatic Transfer**—*Moving* archive files to another archive is initiated automatically whenever the source archive is updated.

Transfer Terms

The following terms are related to the Transfer function:

local archive: An archive that belongs to a local collection.

local collection: A collection that the content server can reach by file access using a mapped or mounted network share.

local transfer: A transfer between local archives. Both the source archive and the target archive are in a local collection.

proxied: In Archiver, the term “proxied” refers to any content server to which the local content server is connected through an outgoing provider. This does not have to be a proxied instance of the master content server.

proxied archive: An archive that belongs to a proxied collection.

proxied collection: A collection on another content server that the local content server can reach through an outgoing provider.

pull transfer: A transfer over an outgoing provider that is owned by the proxied (remote) content server.

push transfer: A transfer over an outgoing provider that is owned by the local content server.

source archive: An archive that contains batch files to be transferred.

target archive: An archive that receives transferred batch files.

targetable archive: An archive that is enabled to be a target archive.

transferring: The process of copying or moving batch files and their associated content files from one archive to another. There are three types of transfers: *local*, *push*, and *pull*.

transfer owner: The content server instance that performs and monitors a transfer.

transfer source: See *source archive*.

transfer target: See *target archive*.

TRANSFER TYPES

There are three types of transfers, listed in order from simplest to most complex:

- ❖ [Local Transfer](#) (page 7-4)
- ❖ [Pull Transfer](#) (page 7-4)
- ❖ [Push Transfer](#) (page 7-5)

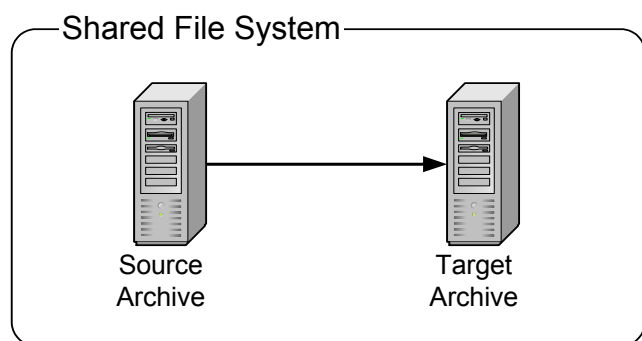
Local Transfer

A *local transfer* is a transfer between local archives, which belong to collections that both the source and target content servers can reach through a mapped or a mounted drive. An outgoing provider is not required. This type of transfer is typically used to combine the batch files of two archives.



Note: If you are transferring between content servers on a shared file system, the mapped or mounted drive must be available to both content servers. This means that the computers must be on and logged in as a user who has system access to both content servers.

Figure 7-5 Local transfer



Pull Transfer

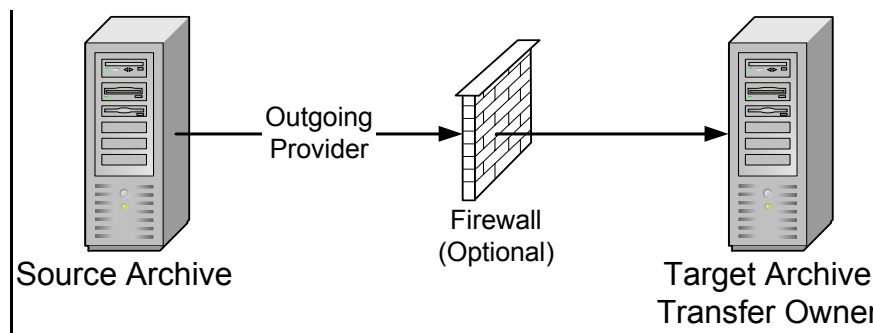
A *pull transfer* is a transfer that is owned by the proxied (remote) content server, which is the instance that is the target of the outgoing provider.

- ❖ Multiple pull transfers can be concurrent.
- ❖ If you are running a pull transfer across a firewall, you might need to configure the firewall to permit the outgoing provider's socket to pass through it.



Note: In Archiver, the term “proxied” refers to any content server to which the local instance is connected through an outgoing provider. This does not have to be a proxied instance of the master content server.

Figure 7-6 Pull transfer

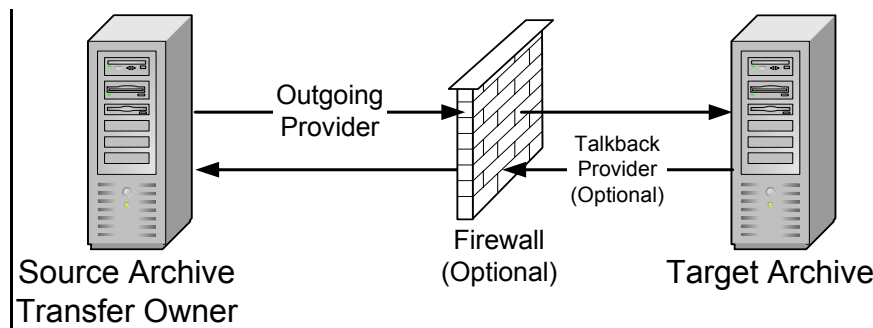


Push Transfer

A *push transfer* is a transfer that is owned by the local content server, which is the instance on which the outgoing provider is set up.

- ❖ For performance monitoring of a push transfer, you also should set up an outgoing provider from the target (proxied) content server back to the source (local) content server. This “talkback” provider can then notify the source content server when each transfer is complete. A push transfer will work without the talkback provider, but the source content server would not be aware of transfer completion or problems.
- ❖ Only one push transfer can be in progress at a time.
- ❖ If you are running a push transfer across a firewall, you might need to configure the firewall to permit the both providers’ sockets to pass through it.

Figure 7-7 Push transfer



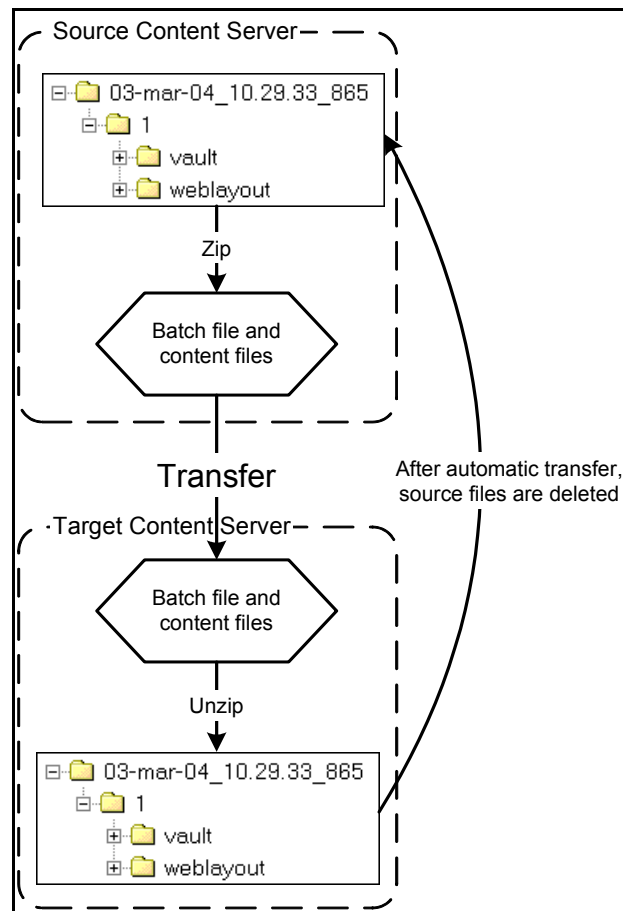
TRANSFERRING BATCH FILES

When a transfer is initiated, the following actions occur:

1. Each batch file in the archive is zipped together with its associated content files.
2. The Zip files are transferred to the target content server by a local file system move (local transfer) or by the outgoing provider (push or pull transfer).
3. The Zip files are unzipped and placed in the appropriate file system locations.
4. For an automated transfer, the batch files and their associated content files are removed from the source content server. For a manual transfer, the batch files and associated content files remain in the source content server.

The transferred archive is now available for import through the Archiver of the target content server.

Figure 7-8 The transfer process



Transfer Rules

- ❖ If you are transferring between content servers on a shared file system, the mapped or mounted drive must be available to both content servers. This means that the computers must be on and logged in as a user who has system access to both content servers.
- ❖ The content server that has an outgoing provider set up is considered the “local” server, and the target content server for the outgoing provider is considered the “proxied” server. Files are always transferred in the direction of the outgoing provider, from the local (source) instance to the proxied (target) instance.
- ❖ To transfer multiple archives from a content server, you must set up a separate outgoing provider from the local instance for each target instance.
- ❖ Only archives that are identified as “targetable” can be transfer targets. When you are selecting a transfer target, the “targetable” attribute can help you find the target archive quickly.
- ❖ At least one archive in the transfer must be local to the transfer owner. For example, you cannot set up a transfer between two content servers that is owned by a third content server.
- ❖ An archive can contain only one copy of each batch file. Therefore, if a batch file being transferred already exists in the target archive, the batch file and its associated content files will be ignored.

MANAGING TRANSFERS

This section describes how to manage transfers tasks, including the following:

- ❖ [Making an Archive Targetable](#) (page 7-8)
- ❖ [Defining an Outgoing Transfer Provider](#) (page 7-9)
- ❖ [Setting a Transfer Destination \(Target\)](#) (page 7-10)
- ❖ [Initiating a Manual Transfer](#) (page 7-10)
- ❖ [Deleting a Transfer](#) (page 7-11)

The Transfer Process

To transfer content between content servers:

1. In the source content server, create the archive to be transferred and set up an export to this archive. See [The Manual Export Process](#) (page 5-3).
2. In the target content server, create the archive to receive transferred content and make the target archive “targetable.” See [Making an Archive Targetable](#) (page 7-8).
3. Set up communications between content servers:
 - If the source and target archives are on a shared file system, make sure that both computers are on and logged in as a user who has system access to both content servers.
 - If the source and target archives are not on a shared file system, create an outgoing provider from the source content server to the target content server. See [Defining an Outgoing Transfer Provider](#) (page 7-9).
4. From the source archive, specify the target archive. See [Setting a Transfer Destination \(Target\)](#) (page 7-10).
5. Initiate the transfer. See [Initiating a Manual Transfer](#) (page 7-10).

The batch files and content files are copied to the target archive.

Making an Archive Targetable

To indicate that an archive can receive transfers from other archives:


1. Open the archive collection that contains the target archive. See [Opening a Collection](#) (page 4-11).
2. Select the target archive in the Current Archives list.
3. Click the [Main Archiver Transfer Screen](#) (page 7-12).
4. Click **Edit** in the Transfer Options section.

The [Transfer Options Screen](#) (page 7-13) is displayed.
5. Select the **Is Targetable** check box.
6. Click **OK**.

Defining an Outgoing Transfer Provider

To create an outgoing provider for transfer purposes:

1. On the source content server, create an outgoing provider. Enter the following information:

Field	Description
Provider Name	Enter a name. This will become a subdirectory in the <code><install_dir>/data/providers/</code> directory.
Provider Description	Enter a user-friendly description, such as <i>Transfer Provider</i> .
Server Host Name	Enter the server host name of the target content server. For example, <i>extranet_server</i> .
Server Port	Enter a unique port number on which the provider will communicate with the target content server.
Instance Name	Enter the name of the target content server instance. For example, <i>Master_on_extranet</i> .
Relative Web Root	Enter the relative web root of the target content server instance. For example, <i>/stellent/</i> .
Proxied check box	Select this check box only if the target content server was installed as a proxy of the local (master) content server.  Caution: Do not select this check box if the relative web root is the same for both content servers.

2. In the System Properties utility of the target content server, set the **IP Address Filter** or **Hostname Filter** to the IP address or host name of the source content server. (The IP Address Filter setting is recommended.)
3. If you are setting up a push transfer (transfer owned by the local content server), consider setting up a “talkback” outgoing provider from the target content server back to the source content server.

4. If you are transferring across a firewall, configure the firewall to permit the outgoing providers' sockets to pass through it.

See the *Content Server System Administration Guide* for details about adding providers.

Setting a Transfer Destination (Target)

To specify the target archive to receive transferred content:

1. Open Archiver from the content server that will own the transfer.
 - For a pull transfer, the transfer owner is the target (proxied) content server.
 - For a push transfer, the transfer owner is the source (local) content server.
2. Open the archive collection that contains the source archive. See [Opening a Collection](#) (page 4-11).
3. Select the source archive in the Current Archives list.
4. Click the [Main Archiver Transfer Screen](#) (page 7-12).
5. Click **Edit** in the Transfer Destination section.

The [Archive Collections Screen](#) (page 7-14) is displayed.
6. Select the collection that contains the target archive.
7. Select the target archive.



Note: The target archive must be identified as targetable. See [Making an Archive Targetable](#) (page 7-8).

8. Click **OK**.

Initiating a Manual Transfer

To transfer content manually:

1. Open Archiver on the source content server.
2. Open the archive collection that contains the source archive. See [Opening a Collection](#) (page 4-11).
3. Select the source archive in the Current Archives list.
4. Select **Actions—Transfer**.

The transfer process is initiated, and the status bar at the bottom of the Archiver screen displays progress messages.

Deleting a Transfer

There are two ways to delete a transfer:

- ❖ [Deleting a Transfer from the Transfer To Tab](#) (page 7-11)
- ❖ [Deleting an Automated Transfer from the Automation for Instance Screen](#) (page 7-11)

Deleting a Transfer from the Transfer To Tab

1. Open the archive collection that contains the source archive. See [Opening a Collection](#) (page 4-11).
2. Select the source archive in the Current Archives list.
3. Click the [Main Archiver Transfer Screen](#) (page 7-12).
4. Click **Remove** in the Transfer Destination section.

You are prompted to confirm the action.

5. Click **Yes**.

Deleting an Automated Transfer from the Automation for Instance Screen

1. Open the archive collection. See [Opening a Collection](#) (page 4-11).
2. Select **Options—View Automation For Instance**.
The Automation Screen is displayed.
3. Click the **Transfers** tab.
4. Select the automated transfer to delete.
5. Click **Remove**.

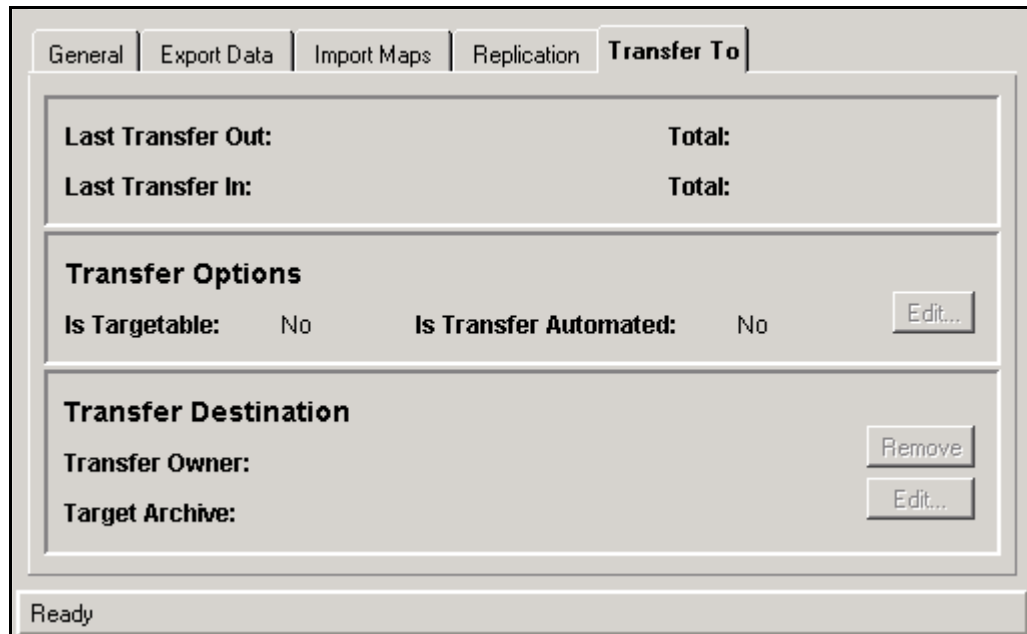
The automated transfer is removed from the list.

TRANSFER INTERFACE SCREENS

The following screens are used to transfer archives:

- ❖ [Archive Collections Screen](#) (page 7-14)
- ❖ [Transfer Options Screen](#) (page 7-13)
- ❖ [Archive Collections Screen](#) (page 7-14)

Main Archiver Transfer Screen

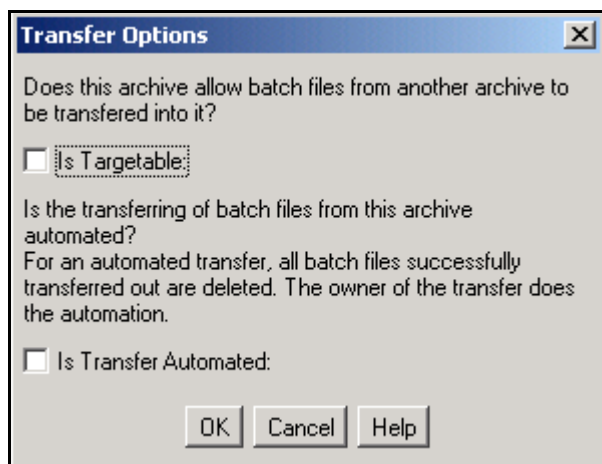


The Transfer To tab of the Archiver application is used to configure batch file transfers from one archive to another. To access this tab, click the [Transfer To](#) tab on [The Main Archiver Screen](#) (page 2-12).

Feature	Description
Last Transfer Out field	The date and time that batch files were last transferred out of the selected archive.
Last Transfer In field	The date and time that batch files were last transferred into the selected archive.

Feature	Description
Total fields	The number of batch files and content items that were included in the last transfer.
Transfer Options	
Is Targetable field	Shows whether the selected archive can be a transfer target.
Is Transfer Automated field	Shows whether the selected archive is transferred automatically.
Edit button	Displays the Transfer Options Screen (page 7-13).
Transfer Destination	
Transfer Owner field	The content server instance that owns the transfer for the selected archive.
Target Archive field	The collection and archive that the selected archive will be transferred to.
Remove button	Deletes the transfer destination.
Edit button	Displays the Archive Collections Screen (page 7-14).

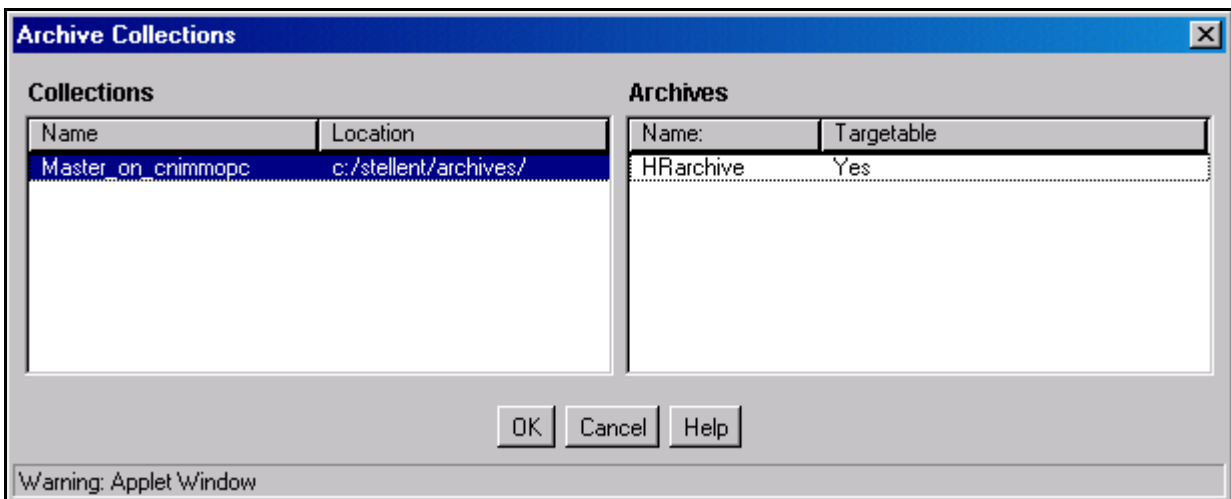
Transfer Options Screen



The Transfer Options screen is used to enable an archive to receive a transfer and to automate transfers out of an archive. To access this screen, click **Edit** in the Transfer Options section of the [Main Archiver Transfer Screen](#) (page 7-12).

Feature	Description
Is Targetable check box	<p>Selected—The selected archive can receive transfers from other archives.</p> <p>Clear—The selected archive cannot receive transfers from other archives.</p>
Is Transfer Automated check box	<p>Selected—Transfer of the selected archive occurs automatically, whenever the archive is updated.</p> <p>Clear—Transfer of the selected archive must be initiated manually.</p>

Archive Collections Screen



The Archive Collections screen is used to specify a targetable archive to receive a transfer. To access this screen, click **Edit** in the Transfer Destination section of the [Main Archiver Transfer Screen](#) (page 7-12).

Feature	Description
Collections list	Lists the names and locations of archive collections that are available to the local content server.
Archives list	Lists the name and targetable status of the archives in the selected collection. (Only targetable archives can be selected from this list.)

REPLICATING FILES

The Replication function is used to automate the Archiver's export, import, and transfer functions. This chapter covers these topics:

Concepts

- ❖ [Replication Overview](#) (page 8-2)
- ❖ [Managing Replication](#) (page 8-4)

Tasks

- ❖ [Setting Up Automatic Export](#) (page 8-4)
- ❖ [Setting Up Automatic Import](#) (page 8-5)
- ❖ [Setting Up Automatic Transfer](#) (page 8-5)
- ❖ [Disabling Automatic Import](#) (page 8-6)
- ❖ [Disabling Automatic Export](#) (page 8-7)
- ❖ [Disabling Automatic Transfer](#) (page 8-7)
- ❖ [Deleting a Registered Exporter](#) (page 8-7)

Interface

- ❖ [Main Archiver Replication Screen](#) (page 8-9)
- ❖ [Registered Exporter Screen](#) (page 8-10)
- ❖ [Automation \(Exporters\) Screen](#) (page 8-11)

- ❖ [Automation \(Importers\) Screen](#) (page 8-12)
- ❖ [Automation \(Transfers\) Screen](#) (page 8-13)

REPLICATION OVERVIEW

If you are automating an import using replication, each batch file is removed as soon as the automatic import is complete. However, you can view the archiving results by preparing an Archive History report using the Web Layout Editor.

If you are replicating files to a contribution server, you should map the Security Group and/or Account field so that users have only Read permission to the imported files. Otherwise, changed files in the importing instance could be overwritten by exported files during a later replication cycle.

For performance reasons, replication is not recommended for large archives (on the order of 20,000 files or more). Export and import of large archives should be run manually, during periods of non-peak usage if possible.



Caution: Archiver cannot be used to move or copy data between two instances that share the same content server instance name (*IDC_Name*). To do so corrupts the data on the target system.

Single Revision Replications

When using the Single Revision Replication option on the [Edit Export Query \(Content\) Screen](#) (page 5-13), be aware of the following considerations:

- ❖ If the new document matches the archiver query on checkin, it is archived. If it does not match the query, nothing happens.
- ❖ If a document has more than one revision and the most recent matching revision is deleted or updated so it no longer matches the query, the next most recent matching revision of that document is replicated. If no revisions match the query, that document is deleted through replication.
- ❖ If a machine (A) is replicating to machine (B) and the **Single Revision Replication** option is used, machine B will at any given time only have one revision of each document. The revLabel of each revision is 1, no matter what the revLabel was on the document that was replicated.

This archiving option allows an administrator to create a staging machine and a production machine. The staging machine can archive all documents that have a specific metadata

field set to 1. The production machine will always have the most recent revision of each document that has this metadata flag set. Setting this flag to 0 on the staging machine removes it from the production machine and rolls it back to the next most recent revision with that metadata field set to 1.

Replication Uses

Typical uses for the Replication function include:

- ❖ Automatically exporting from one content server instance and importing to another content server instance to synchronize two web sites.
- ❖ Copying content automatically between two contribution/consumption servers.
- ❖ Automatically moving certain documents from a contribution server to a higher-security content server.
- ❖ Automatically moving old content to a storage location.

Replication Methods

You can automate Archiver functions in the following ways:

- ❖ **Automatic Export**—Export to a local archive is initiated automatically whenever a content item that meets the export criteria is indexed.
- ❖ **Automatic Import**—Import from a local archive is initiated automatically, about once a minute.
- ❖ **Automatic Transfer**—Moving archive files to a different content server instance over sockets is initiated automatically whenever the source archive is updated.

See Also

- [About Exporting](#) (page 5-2)
- [The Import Process](#) (page 6-9)
- [File Transfer Overview](#) (page 7-2)



Note: You can export expired revisions manually, but expired revisions do not get exported automatically.

MANAGING REPLICATION

Several tasks are involved in managing the replication process, including setting up automatic exports, imports and transfers. This section describes these tasks:

- ❖ [Setting Up Automatic Export](#) (page 8-4)
- ❖ [Setting Up Automatic Import](#) (page 8-5)
- ❖ [Setting Up Automatic Transfer](#) (page 8-5)
- ❖ [Disabling Automatic Import](#) (page 8-6)
- ❖ [Disabling Automatic Export](#) (page 8-7)
- ❖ [Disabling Automatic Transfer](#) (page 8-7)
- ❖ [Deleting a Registered Exporter](#) (page 8-7)

Setting Up Automatic Export

To set up an automatic export:

1. Set up the export and run a manual export. See [The Manual Export Process](#) (page 5-3).
2. Open Archiver on the content server that content is to be exported from.
3. Open the archive collection.
4. Select the archive to export to automatically in the Current Archives list.
5. Click the Replication tab.
6. Click **Edit**.

The [Registered Exporter Screen](#) (page 8-10) is displayed.

7. Select the **Enable Automated Export** check box.
8. Click **Register**.

The current collection is added to the Registered Exporters box.

9. Click **OK**.

Each revision that meets the export criteria will be exported to this archive when it is indexed. The batch file is removed as soon as each export is complete.



Note: You can export expired revisions manually, but expired revisions do not get exported automatically.

Setting Up Automatic Import

To set up an automatic import:

1. Set up the import and run a manual import. See [The Import Process](#) (page 6-9).
2. Open Archiver on the content server that the archive is to be imported to.
3. Open the archive collection.
4. Select the archive to import automatically in the Current Archives list.
5. Click the Replication tab.
6. Click **Register Self**.

You are prompted to confirm the action.

7. Click **OK**.

The selected archive will be imported automatically, about once a minute. All source batch files are removed as soon as each import is complete.



Note: The Replication function does not import content types and user attributes.

Setting Up Automatic Transfer

To set up an automatic transfer:

1. Set up the transfer and run a manual transfer. See [File Transfer Overview](#) (page 7-2).
2. Open Archiver on the source content server.
3. Open the archive collection.
4. Select the source archive in the Current Archives list.
5. Click the Transfer To tab.
6. Click **Edit**.

The [Transfer Options Screen](#) (page 7-13) is displayed.

7. Select the **Is Transfer Automated** check box.
8. Click **OK**.
9. Test the automatic transfer:

- a. In the source content server, check in a new document that meets the export criteria.
- b. If the export is automated, wait until automated export occurs after indexing. Otherwise, export the source archive manually.

The archive should be transferred to the target content server within a few minutes.



Note: The Replication function does not transfer content types and user attributes.

Disabling Automatic Import

There are two ways to disable an automatic import:

- ❖ [Unregistering an Importer from the Replication Tab](#) (page 8-6)
- ❖ [Deleting a Registered Importer from the Automation for Instance Screen](#) (page 8-6)

Unregistering an Importer from the Replication Tab

1. Open the archive collection. See [Opening a Collection](#) (page 4-11).
2. Select the archive in the Current Archives list.
3. Click the Replication tab.
4. Click **Unregister**.

Automatic importing from the selected archive is disabled.

Deleting a Registered Importer from the Automation for Instance Screen

1. Open the archive collection. See [Opening a Collection](#) (page 4-11).
2. Select **Options—View Automation For Instance**.
The Automation for Instance Screen is displayed.
3. Click the **Importers** tab.
4. Select the registered importer to delete.
5. Click **Remove**.

The registered importer is removed from the list.

Disabling Automatic Export

To disable automatic export:

1. Open the archive collection. See [Opening a Collection](#) (page 4-11).
2. Select the archive in the Current Archives list.
3. Click the Replication tab.
4. Click **Edit**.

The [Registered Exporter Screen](#) (page 8-10) is displayed.

5. Clear the **Enable Automated Export** check box.
6. Click **OK**.

Automatic exporting of the selected archive is disabled.

Disabling Automatic Transfer

To disable automatic transfer:

1. Open Archiver on the source content server.
2. Open the source archive collection. See [Opening a Collection](#) (page 4-11).
3. Select the source archive in the Current Archives list.
4. Click the Transfer To tab.
5. Click **Edit**.

The [Transfer Options Screen](#) (page 7-13) is displayed.

6. Clear the **Is Transfer Automated** check box.
7. Click **OK**.

Automatic transfer of the selected archive is disabled.

Deleting a Registered Exporter

There are two ways to delete a registered exporter:

- ❖ [Deleting a Registered Exporter from the Replication Tab](#) (page 8-8)
- ❖ [Deleting a Registered Exporter from the Automation for Instance Screen](#) (page 8-8)

Deleting a Registered Exporter from the Replication Tab

1. Open the archive collection. See [Opening a Collection](#) (page 4-11).
2. Select the archive in the Current Archives list.
3. Click the Replication tab.
4. Click **Edit**.
The [Registered Exporter Screen](#) (page 8-10) is displayed.
5. Select the **Enable Automated Export** check box.
6. Select the content server instance to delete in the **Registered Exporters** list.
7. Click **Remove**.
The registered exporter is removed from the list.
8. Click **OK**.

Deleting a Registered Exporter from the Automation for Instance Screen

1. Open the archive collection. See [Opening a Collection](#) (page 4-11).
2. Select **Options—View Automation For Instance**.
The Automation for Instance Screen is displayed.
3. Select the registered exporter to delete.
4. Click **Remove**.
The registered exporter is removed from the list.

REPLICATION INTERFACE SCREENS

The following screens are used in the replication process:

- ❖ [Main Archiver Replication Screen](#) (page 8-9)
- ❖ [Registered Exporter Screen](#) (page 8-10)
- ❖ [Automation \(Exporters\) Screen](#) (page 8-11)
- ❖ [Automation \(Importers\) Screen](#) (page 8-12)
- ❖ [Automation \(Transfers\) Screen](#) (page 8-13)

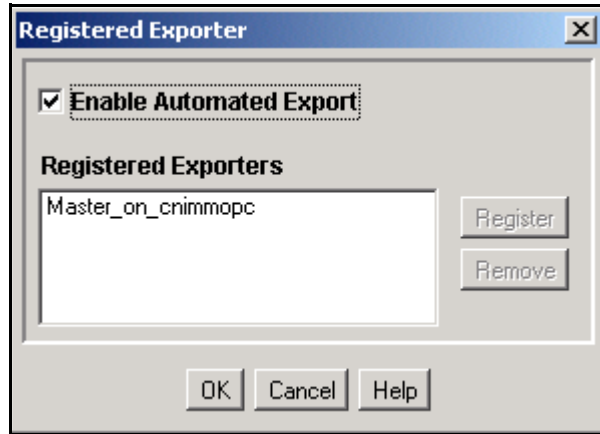
Main Archiver Replication Screen

The screenshot shows the 'Replication' tab of the Archiver application. It features a tabbed interface with 'Replication' selected. The 'Export Automated' checkbox is checked, showing 'Yes'. Below it, a list box titled 'Registered Exporters' contains the entry 'Master_on_katetest' and an 'Edit...' button. Underneath, the 'Registered Importer' field is empty, and the 'Logon User Name' field is also empty. At the bottom, there are two buttons: 'Register Self' and 'Unregister'.

The Replication tab of the Archiver application is used to configure automated exports and imports. To access this screen, click the tab on the [The Main Archiver Screen](#) (page 2-12).

Feature	Description
Export Automated field	Shows whether automatic export is enabled for the selected archive.
Registered Exporters box	Lists the collections that are currently registered as automatic exporters for the selected archive.
Edit button	Displays the Registered Exporter Screen (page 8-10).
Registered Importer field	Shows the collection that is currently registered as an importer for the selected archive.
Logon User Name field	Shows the user name of the user who was logged in when the importer was registered.
Register Self button	Registers the selected archive as an automatic importer.
Unregister button	Unregisters the registered importer.

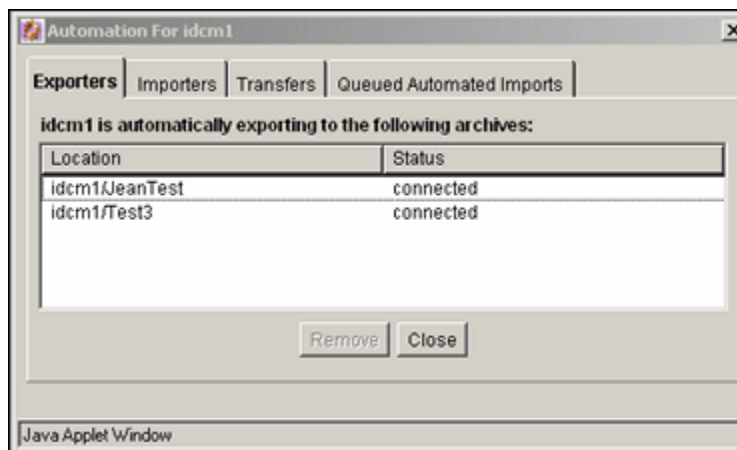
Registered Exporter Screen



The Registered Exporter screen is used to specify which collections automatically export to the current archive, and to enable and disable automatic export. To access this screen, click **Edit** on the [Main Archiver Replication Screen](#) (page 8-9).

Feature	Description
Enable Automated Export check box	Selected —Export will occur automatically whenever a content item that meets the export criteria is indexed. Clear —Automatic export is disabled.
Registered Exporters box	Lists the collections that are registered as automatic exporters for the selected archive.
Register button	Adds the current collection to the list of registered exporters. This button is not available if automatic export is disabled.
Remove button	Removes the selected collection from the list of registered exporters. This button is not available if automatic export is disabled.

Automation (Exporters) Screen

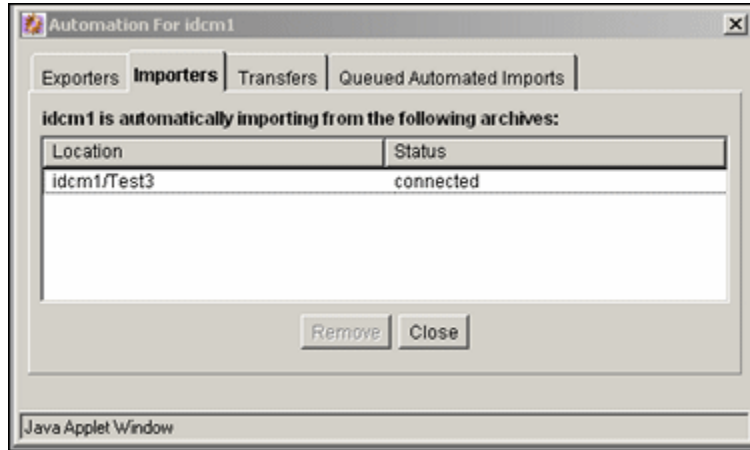


The Automation Screen has three tabs: Exporters, Importers, and Transfers. To access the Automation screen, highlight a collection and select **View Automation for instance** from the **Options** menu on [The Main Archiver Screen](#) (page 2-12)

The Exporters tab of the Automation for *Instance* screen is used to view and remove archives that are being exported automatically.

Feature	Description
Location column	Lists the collection and archive for each archive that is being exported automatically.
Status column	Shows the status of the automatic export: connected or disconnected.
Remove button	Removes the selected archive as a registered exporter.

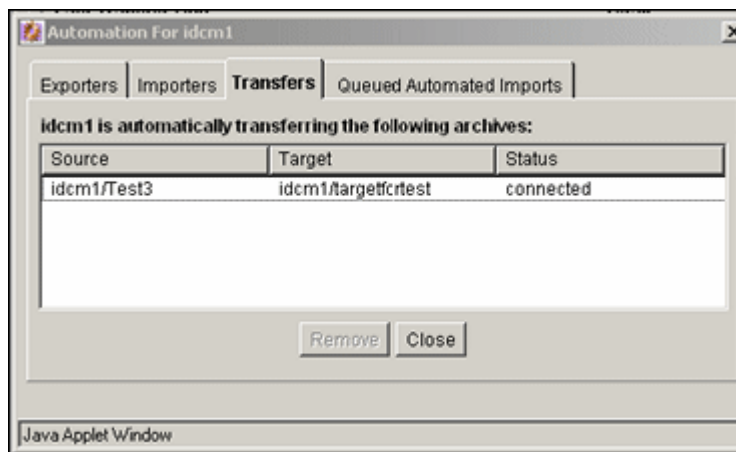
Automation (Importers) Screen



The Importers tab of the Automation screen is used to view and remove archives that are being imported automatically.

Feature	Description
Location column	Lists the collection and archive for each archive that is being imported automatically.
Status column	Shows the status of the automatic import: connected or disconnected.
Remove button	Removes the selected archive as a registered importer.

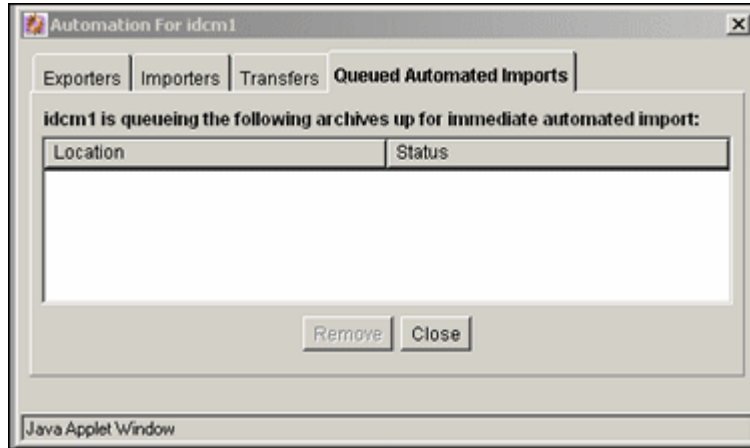
Automation (Transfers) Screen



The Transfers tab of the Automation screen is used to view and remove archives that are being transferred automatically.

Feature	Description
Source column	Lists the collection and archive for the transfer source.
Target column	Lists the collection and archive for the transfer target.
Status column	Shows the status of the automatic transfer: connected or disconnected.
Remove button	Removes the selected transfer.

Automation (Queues) Screen



The Queued Automated Imports screen is used to view those imports that are queued to occur.

Feature	Description
Location column	Lists the collection and archive for the transfer source.
Status column	Shows the status of the automatic transfer.
Remove button	Removes the selected transfer.

ARCHIVE AND MIGRATION STRATEGIES

This chapter describes several typical archiving and migration strategies.



Note: All of scenarios described in this section can be run manually or automatically (through replication).

- ❖ [Export](#) (page 9-1)
- ❖ [Import](#) (page 9-2)
- ❖ [Self Export/Import](#) (page 9-3)
- ❖ [One-to-One Archiving](#) (page 9-4)
- ❖ [One-to-Many Archiving](#) (page 9-6)
- ❖ [Many-to-One Archiving](#) (page 9-9)

EXPORT

A simple export is typically used to:

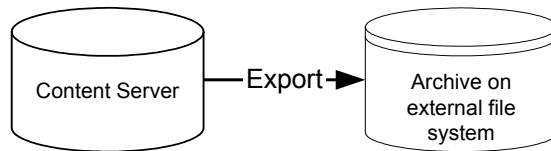
- ❖ Store and later remove outdated content on a file system.
- ❖ Store content on a file system for later retrieval.
- ❖ Retain a “snapshot” of a content server at a certain date and time.

Export Configurations

The following are possible export-only configurations, shown in order from most to least typical:

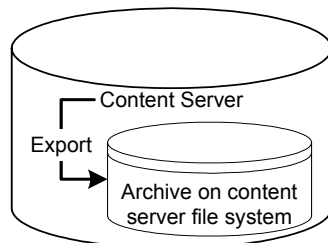
- ❖ Export to a collection on an external file system.

Figure 9-9



- ❖ Export to one of the content server's own collections.

Figure 9-10



IMPORT

A simple import is typically used to:

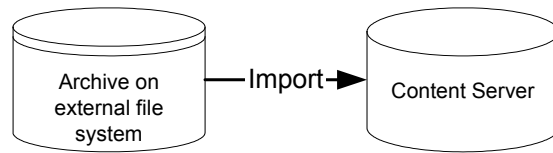
- ❖ Retrieve content from storage after an unintended deletion.
- ❖ Restore content from an archived “snapshot” of a content server.

Import Configurations

The following are possible import-only configurations, shown in order from most to least typical:

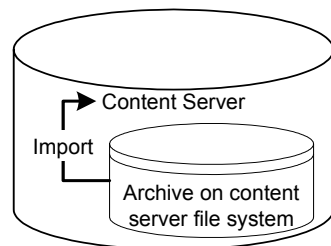
- ❖ Import from a collection on an external file system.

Figure 9-11



- ❖ Import from one of the content server's own collections.

Figure 9-12



SELF EXPORT/IMPORT

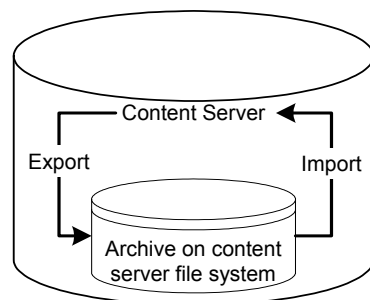
Self export/import is typically used to change content metadata to new values.

Self Export/Import Configurations

The following are possible self export/import configurations, shown in order from most to least typical:

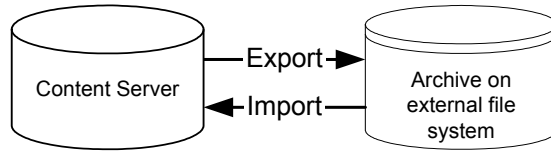
- ❖ Export to and import from one of the content server's own collections.

Figure 9-13



- ❖ Export to and import from a collection on an external file system.

Figure 9-14



ONE-TO-ONE ARCHIVING

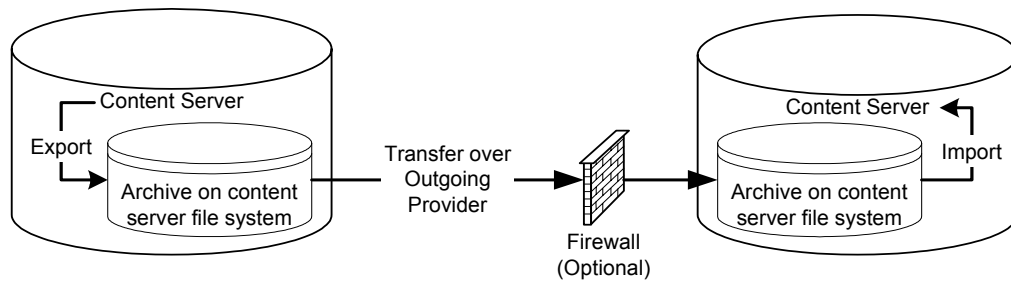
One-to-one archiving is used to copy or move content from one content server to another.

One-to-One Archiving Configurations

The following are possible one-to-one archiving configurations, shown in order from most to least typical:

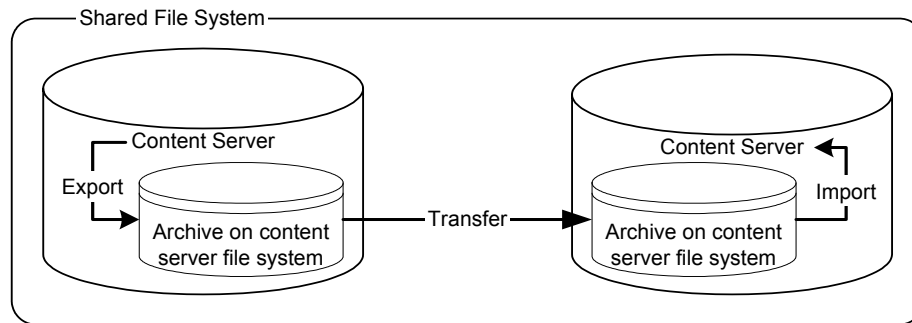
- ❖ Export, transfer, and import over sockets.

Figure 9-15



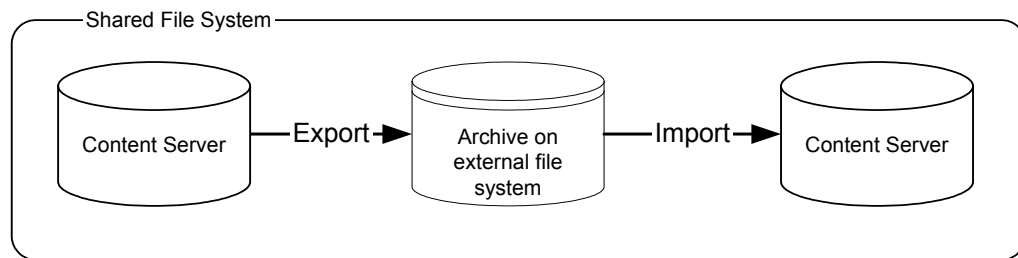
- ❖ Export, transfer, and import on a shared file system.

Figure 9-16



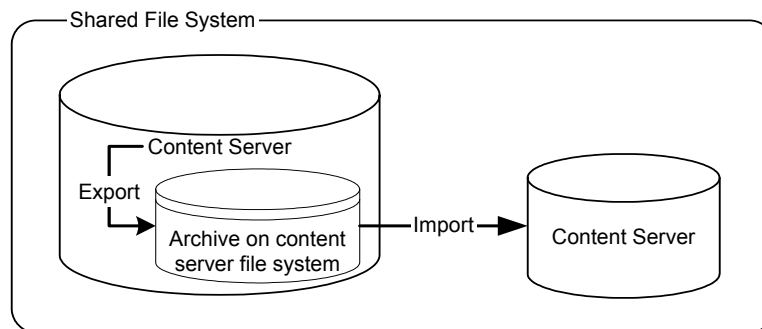
- ❖ Export to and import from a collection on a shared external file system.

Figure 9-17



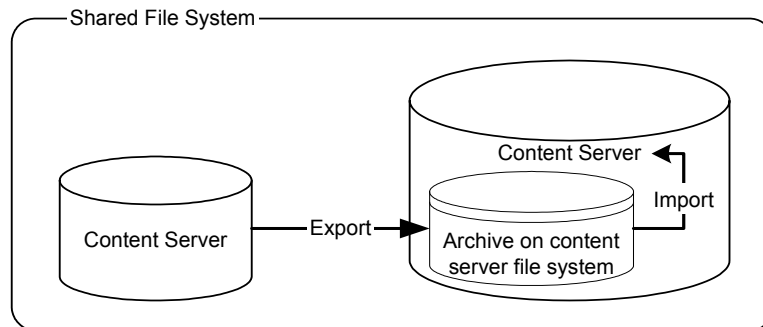
- ❖ Export to the source content server's collection and import directly from that collection on a shared file system.

Figure 9-18



- ❖ Export from the source content server directly to a collection on the target content server and import from that collection on a shared file system.

Figure 9-19



ONE-TO-MANY ARCHIVING

One-to-many archiving is typically used to copy or move content from a contribution server to consumption servers.

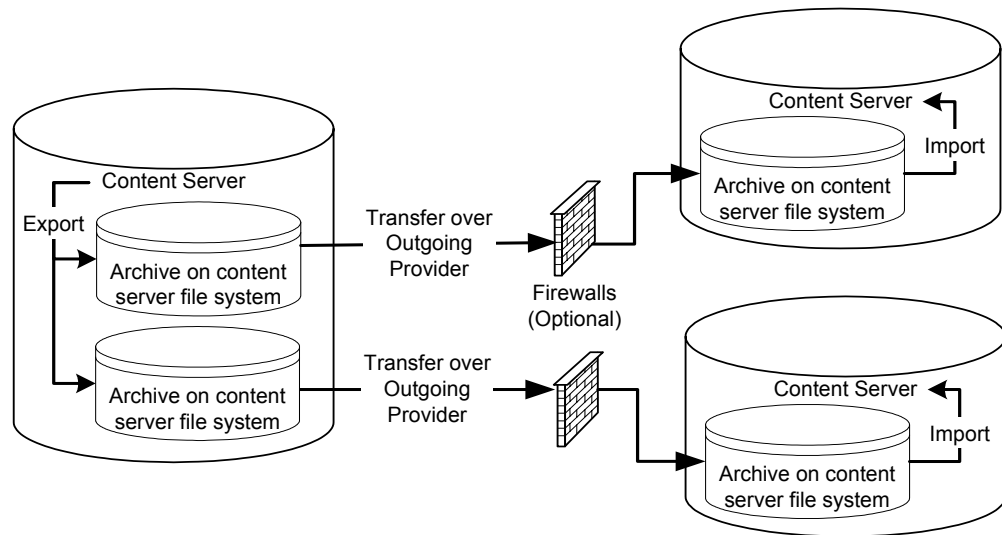
One-to-Many Archiving Configurations

The following are possible one-to-many archiving configurations, shown in order from most to least typical:

- ❖ Export, transfer, and import over sockets.

When this configuration is automated using replication, a separate export archive is required for each target server because the source files are deleted upon transfer. However, for manual transfer, you could transfer a single archive to multiple targets.

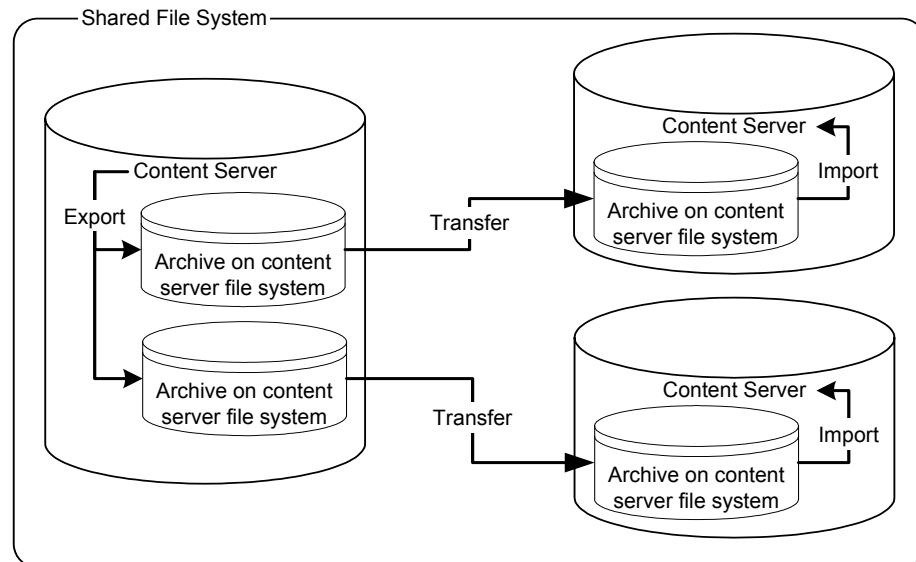
Figure 9-20



- ❖ Export, transfer, and import on a shared file system.

When this configuration is automated using replication, a separate export archive is required for each target server because the source files are deleted upon transfer. However, for manual transfer, you could transfer a single archive to multiple targets.

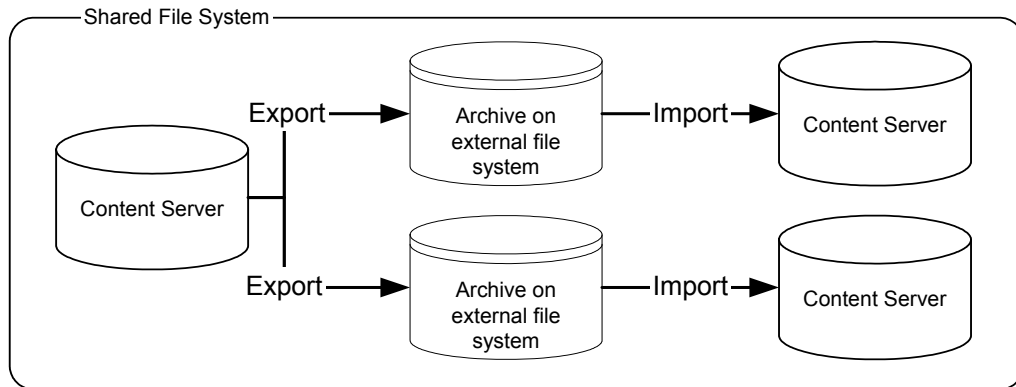
Figure 9-21



- ❖ Export to and import from a collection on a shared external file system.

When this configuration is automated using replication, a separate export archive is required for each target server because the source files are deleted upon import. However, for manual import, you could import a single archive from multiple targets.

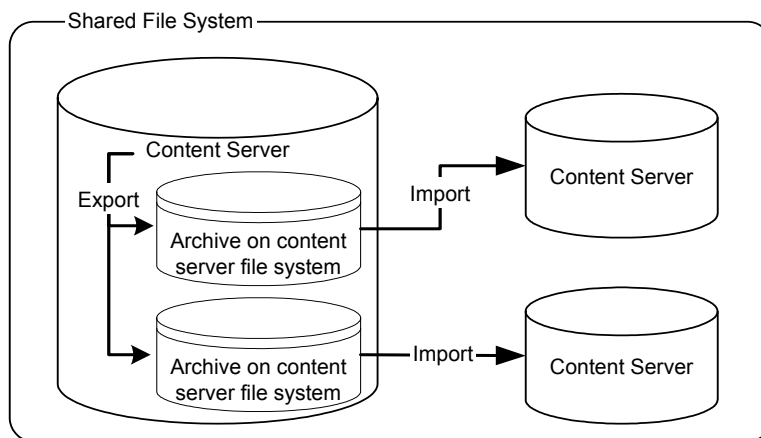
Figure 9-22



- ❖ Export to the source content server’s collection and import directly from that collection on a shared file system.

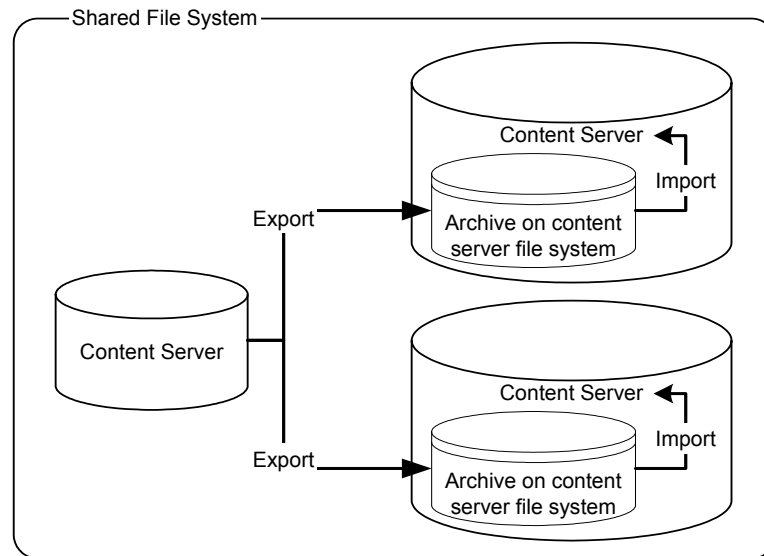
When this configuration is automated using replication, a separate export archive is required for each target server because the source files are deleted upon import. However, for manual import, you could import a single archive from multiple targets.

Figure 9-23



- ❖ Export from the source content server directly to collections on the target content servers and import from those collections on a shared file system.

Figure 9-24



MANY-TO-ONE ARCHIVING

Many-to-one archiving is typically used to:

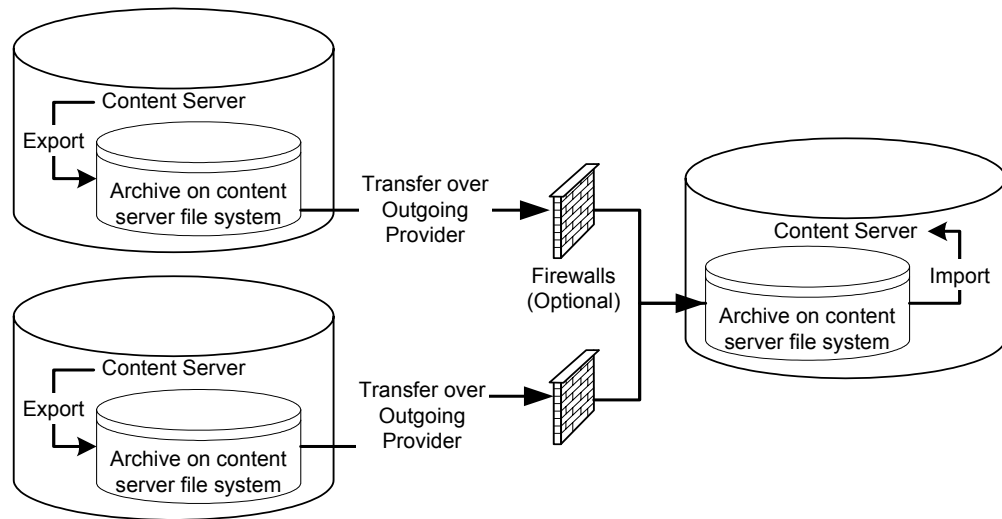
- ❖ Copy or move content from several contribution servers to one consumption server.
- ❖ Move sensitive content from several contribution servers to a more secure contribution server.

Many-to-One Archiving Configurations

The following are possible many-to-one archiving configurations, shown in order from most to least typical:

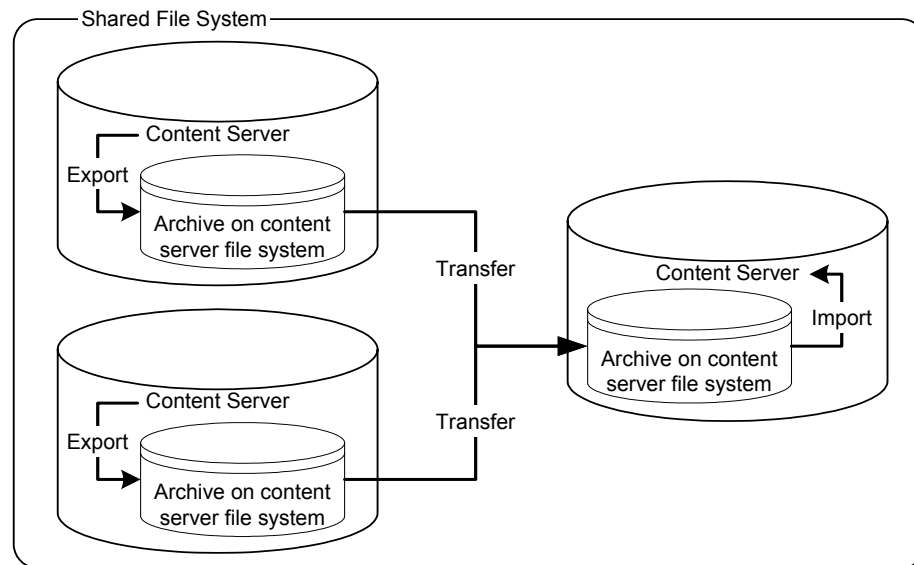
- ❖ Export, transfer, and import over sockets.

Figure 9-25



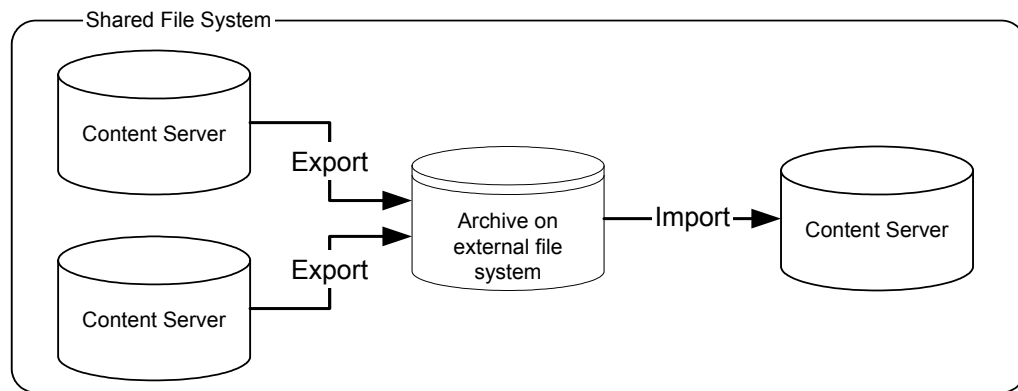
❖ Export, transfer, and import on a shared file system.

Figure 9-26



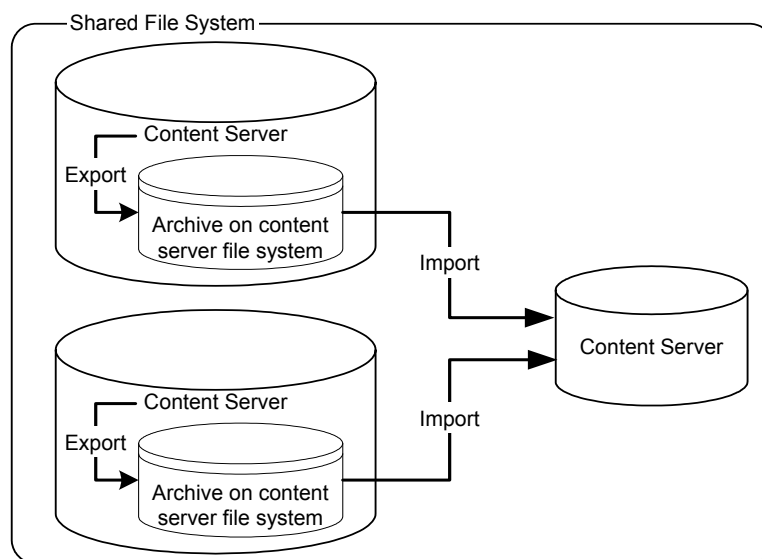
❖ Export to and import from a collection on a shared external file system.

Figure 9-27



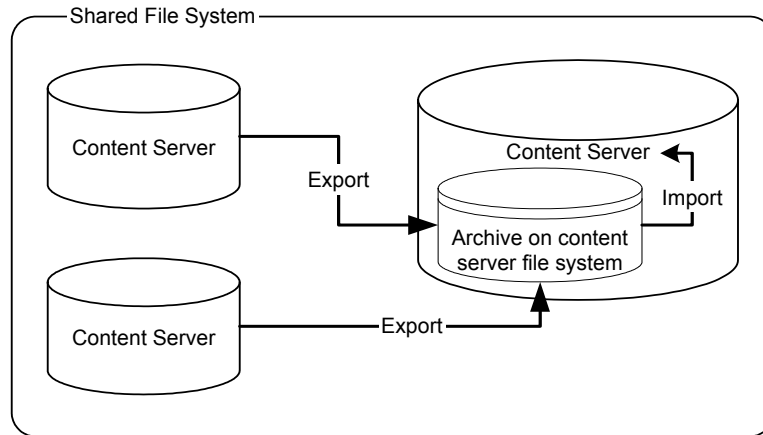
- ❖ Export to the source content servers' collections and import directly from those collections on a shared file system.

Figure 9-28



- ❖ Export from the source content servers directly to a collection on the target content server and import from that collection on a shared file system.

Figure 9-29



ARCHIVER EXAMPLES

The following examples illustrate how to use Archiver to solve common business problems:

- ❖ [Copying a Content Server Instance to a Laptop](#) (page 9-12)
- ❖ [Transferring by Content Type and Author](#) (page 9-13)
- ❖ [Changing Metadata Fields](#) (page 9-14)
- ❖ [Adding Content ID Prefixes](#) (page 9-15)
- ❖ [Changing Release Dates](#) (page 9-16)

Copying a Content Server Instance to a Laptop

In this example, you need to set up a laptop computer with a copy of a content server instance for a colleague who will be traveling.

This procedure assumes that the source content server and the laptop computer have access to the same file system, and that the laptop computer has Content Server installed.

1. Open Archiver on the source content server.
2. Create a new archive.
3. Because you want to export all content, you do not need to create an export query.
4. To limit the file size of the archive, select the **Latest Revisions** option on the Edit Export Query screen.

5. If content types and user attributes need to be copied to the laptop system, select **Content Configuration** and **User Configuration** on the Export Data tab.
6. Set export options from the General tab:
 - To save space on the local machine, select **Replace Existing Export Files**.
 - If your colleague needs web-viewable files, select **Copy Web Content**.
7. Initiate the export manually.
8. Open Archiver on the laptop content server.
9. Open the source collection and select the archive to import.
10. If content type and user attributes were exported, select these options on the Import Archive screen.
11. Initiate the import manually.

Transferring by Content Type and Author

In this example, you have a contribution content server where users submit content. You want to automatically archive *HR* content that is contributed by *JChang* to a content server in another building that serves as a Human Resources portal.

This procedure assumes that the two content servers do not have access to a shared file system, and that the Human Resources portal server should contain only the latest revision of each content item.

Set up an automated export on the Contribution content server:

1. Create an archive.
2. Set these export queries for the archive:

Field	Operator	Value
Content Type	Is	HR
Author	Is	JChang

3. On the Edit Export Query screen:
 - Select the **Export Revisions with Release Date later than most recent Export Date** check box.
 - Select the **Latest Revisions** option.

4. Set export options from the General tab:
 - To save space on the local machine, select **Replace Existing Export Files**.
 - To include web-viewable files in the archive, select **Copy Web Content**.
5. Export the archive manually.
6. On the Replication tab, register the archive as an automated exporter.

Set up an automated import on the HR Portal content server:

1. Create a target archive.
2. Select the target archive and make sure that the **Update** Override Action is set on the General tab.
3. Import the target archive manually.
4. On the Replication tab, register the archive as an automated importer.

Set up an automated pull transfer from the Contribution server to the HR Portal server:

1. On the Contribution content server, create an outgoing provider to the HR portal content server.
2. Open Archiver on the HR portal content server.
3. Open the target collection and make the target archive “targetable.”
4. Open the source collection and select the source archive.
5. On the Transfer To tab, select the target archive as the target destination.
6. Run a manual transfer.
7. Set the transfer to be automated.

Changing Metadata Fields

In this example, you have a custom metadata field, *ApprovedBy*, which was used in one content server instance, but the field name needs to be changed to *Sponsor* for consistency with other content servers.

1. Create the new *Sponsor* metadata field.
2. Create an archive.
3. Manually export all content to the archive. (You do not need to create an export query.)

- Set up the following import field map for the archive:

Export Field	Target Field
xApprovedBy	Sponsor

- From the General tab, select **Update** as the Override Action.
- Initiate the import manually.
- Delete the *ApprovedBy* field from the content server.

Adding Content ID Prefixes

In this example, you have two content servers that are used as contribution servers, but you want to have all content available for consumption from both servers. You can set up an automatic transfer in both directions. However, both content servers use automatic Content ID generation with similar numbering schemes, which could result in errors or overwritten revisions if you import files with Content IDs that already exist on the target content server.

- ❖ One way to avoid conflicts is to add a unique prefix in the Auto Number Prefix system property on both content servers.
- ❖ Another way to accomplish this is to add a unique prefix during the import process:

- Set up the following value map on the first content server's import archive:

Input Value	Field	Output Value
All check box	Content ID	server2_<\${DocName\$}>

- Set up the following value map on the second content server's import archive:

Input Value	Field	Output Value
All check box	Content ID	server1_<\${DocName\$}>

Changing Release Dates

In this example, you are copying archives to other content servers using replication or transfer, but you want the release date on the target content server to be the date the content item was copied.

1. Set up an export and import for replication or transfer.
2. Select the archive to import in the target content server.
3. Set up the following import value map for the archive:

Input Value	Field	Output Value
All check box	Release Date	<\$dateCurrent()\$>

The release dates will reflect the local date and time of the target content server.

CONFIGURATION MIGRATION TIPS

There are several points to keep in mind when using the Configuration Migration Utility.

- ❖ If you use directory locations on the target system that differ from the standard content server installation directories, you cannot use Configuration Migration but will need to do a manual copy of the pertinent directories.

For example, if you use partitioned file systems and want to split content server storage on the partitions, you will need to add configuration variables to the `/bin/intradoc.cfg` file to point to the correct locations for the directories that are stored elsewhere.

- ❖ If you are using different web servers for the source and the target systems, make sure to exclude the web server information when using Configuration Migration to prepare an export.
- ❖ Not all components can be exported using the Configuration Migration Utility. For example, components that require an interactive installation cannot be exported. They must be installed separately on the target system.
- ❖ Dynamic Converter rules are not transferred with the Configuration Migration Utility. They must be manually added to the target system by copying the `data/conversion/cvtemplates.hda` file from the source system to the target system. In addition, you should create an archive for dynamic converter templates and transfer

them to the target system before transferring other content. Otherwise an error occurs when a document that is eligible for dynamic conversion is imported.

- ❖ The Configuration Migration Utility is particularly useful for propagating a part of an instance to another. For example, some customizations, such as workflows or content profiles, may best be designed and tested on a development instance. After they are tested they can be migrated to your production system. Other development work, such as component development, is probably best done using the Component Wizard and Component Manager for testing and deployment.
- ❖ Problems can occur when importing archives if required fields and validated options lists aren't considered. If metadata fields have been changed to be required or if option lists have been altered between one migration and another, it will be difficult to import content into another system with those same metadata field definitions. To avoid this problem, temporarily change required fields to be non-required and change option lists to be non-validated before importing data on a target system.
- ❖ You can use the Configuration Migration Utility in conjunction with the archiver to create a regular 'snapshot' of your instance. You should also make sure to make appropriate backups of your databases at the same time, to ensure that the entire system stays in sync.
- ❖ You should create a configuration migration package before creating an archive package in order to ensure that the appropriate metadata information is available on the importing content server.
- ❖ Remember that migration is an additive process. The exporting configuration bundle of metadata information is added to the metadata that currently exists in the importing content server. If metadata information currently exists that matches the metadata being imported, and if the Force Overwrite rule has been selected during import, then the metadata on the importing content server is overwritten by the metadata from the exported bundle.



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ZLIB LICENSE

* zlib.h -- interface of the 'zlib' general purpose compression library
version 1.2.3, July 18th, 2005

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