ARCHIVING SOFTWARE
Administrator's Guide

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About this Manual

Typographical Conventions

This manual distinguishes between different types of information using the following conventions:

- Terms taken from the interface itself, such as commands, appear in **bold**.
- Keys appear in small caps, for example: "Press the SHIFT key".
- Numbered lists mean there is a procedure to follow.
- When the conjunction -or- appears next to a paragraph, it means there is the choice of another procedure for carrying out a given task.
- When a menu command contains submenus, the menu name followed by the command to select appear in bold. Thus, "Go to **File > Open**" means choose the **File** menu, then choose the **Open** command.

This symbol highlights important information on how a particular command or procedure works.

Following this symbol you will find hints and tips for optimizing tasks, speeding up commands, and so on.

**About your
Product**

Some of the functions described in this manual may not be available in your product.

For the complete list of specific features available in your software, refer to the specification sheet provided with the product.

Introduction

Welcome!

Congratulations! You have just acquired a complete and secure product solution to store barcode labels, trace the history of design modifications and print events, manage label versions and set up approval workflows.

The **ARCHIVING** Server and Clients run on your company's network in conjunction with your Label Designers, and an optional Web module can also be used to provide limited access to external users.

The great scalability of this product allows you to also install all components on your PC, and work in standalone mode like a simple desktop application.

ARCHIVING SOFTWARE Modules

The **ARCHIVING SOFTWARE** package contains several modules: the **ARCHIVING Server,** the **ARCHIVING Server Client** and the **ARCHIVING Server Web Module**.

ARCHIVING Server

The **ARCHIVING Server** is a centralized database driven through a Windows® service. It establishes the connection with the different data sources, and processes all client requests: Check In, Check Out, Print History, Document Approval, etc. The Server also uses two subsystems to operate: UMSS (User Management System) and MSGS (Messaging System). UMSS and MSGS respectively perform user configuration and messaging functions.

ARCHIVING Server Client

The **ARCHIVING Server Client** is the add-in for the Label Designer application. When the user invokes the **ARCHIVING Software** from the Label Designer, this add-in connects to the **Server** and checks user rights. If the connection is successful then the user is allowed to perform different document management actions such as Check In and Check Out, and is given access to the centralized label storage database. The actions allowed depend upon the security settings and permissions that have been granted to the group to which the user belongs.

ARCHIVING Server Web Module

The **ARCHIVING Server Web Module** is a Web application accessible from any Web browser on the Internet or an intranet. Upon successful user Web authentication, this module establishes a connection with the **ARCHIVING Server** and gives access to limited functions including viewing documents and history records, and approving documents before delivery in production.

How It Works

The **ARCHIVING Server** typically runs on a server machine. On the internal network, any client station that has a Label Designer and the **ARCHIVING Server Client** add-in can interact with the server at any time. All the **ARCHIVING Software** components can also be installed on a single PC. In that case the system works in standalone mode, like a simple desktop application.

Product Description

The **ARCHIVING Software** is designed to run on any computer running a supported Windows® operating system.

Your product includes the following components:

- a CD-ROM

- complete documentation

- a license agreement

- an activation code, which allows you to activate the license of the **ARCHIVING Server** on your server machine

Note

If you have not purchased an activation code yet, you can still use the ARCHIVING Software for 30 days. During this trial period you can install as many clients as you want, and the system will accept up to 3 simultaneous connections to the server. After the trial period you will need to purchase an activation code. All the work that was done during the trial period is kept in the database, and you can continue it after activation without any disruption.

CHAPTER 2

ARCHIVING Server Installation

System Requirements

The basic software and hardware requirements needed to run the **Server** are:

- A PC with Windows® 2000 SP4, Windows® XP SP2, Windows® Server 2003 SP2, Windows® 2008 or Windows® Vista (32 or 64 bits)

- 256 MB RAM minimum (512 MB recommended) and 1 Ghz processor for Windows® 2000 systems

- 1GB RAM minimum (2 GB recommended) and 2 or 3 Ghz processor for Windows® 2003, 2008 or Vista systems

- A VGA monitor or better

- A hard drive with at least 500 MB of free disk space

- Microsoft® .NET Framework 2.0

- Microsoft® Data Access Components (MDAC) 2.8

- Supported database management systems (DBMS): Microsoft® SQL Server™ family (Microsoft® SQL Server™, Microsoft® SQL Server™ Desktop Engine (MSDE), Microsoft® SQL Server™ Express), Microsoft® Access, or Oracle® database

Note

Access and SQL Server Express are not recommended for a configuration with multiple clients.

Installation

Before running the installation program, check the configuration of your server machine.

The **ARCHIVING Server** installation requires administration rights on the server machine. Please check that all needed permissions are granted, both at the operating system level, and at the DBMS level, as you will be installing new Windows services, copying program files, setting up a Web module on Internet Information Services (IIS), and creating new databases on your DBMS.

> If you are installing the web module, and your platform does not yet have Microsoft ® IIS installed, it is recommended that you install Microsoft .NET Framework 2.0 **after** IIS so that the ASP.NET service registration be done automatically.

To install the **ARCHIVING Server**:

Step 1 > Place the CD-ROM in the appropriate drive.

The **ARCHIVING Software** CD window appears. Select the **ARCHIVING Server** and click on **Install**.

If the CD-ROM does not start up automatically, go to **Start > Run**, type **cdsetup.exe**, and click **OK**.

Step 2 > The **Installation Wizard** will appear. Click **Next**.

Step 3 > Read the license agreement. If you agree with the license agreement, select "I accept the terms of the license agreement" and click **Next**.

Figure 1 License Agreement

Step 4 > Select the setup type: **Typical** or **Custom**.
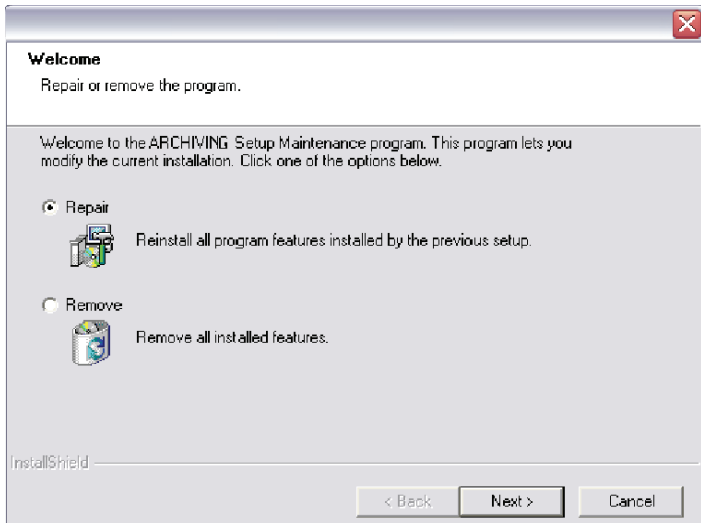
Figure 2 Setup Type

If you select **Typical**, the ARCHIVING Server component and **UMSS/MSGS** subsystems will be installed. You will need to select the database type before the installation can be completed. All other settings are automatically defined during the installation.

Selecting a **Custom** installation will allow you to select the components you wish to install, and to customize their setup on your machine. If you choose **Custom**, you will be guided through the following steps:

Step 1 > Choose the Destination Location.

In this step you can choose the folder where the files will be installed. The step is available only with the **Custom** installation type.
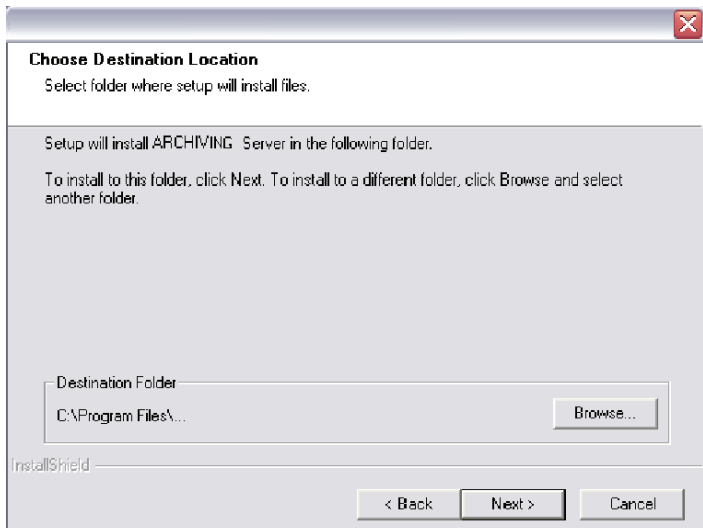
Figure 3 Choose Destination Location

Step 2 > Select the features you wish to install.

Here you can select which components you'd like to install:

- ARCHIVING Server

- UMSS and MSGS

- ARCHIVING Server Web

Depending on the components you choose to install, the following steps may differ in order.

> The **ARCHIVING Server** needs UMSS/MSGS to run. Therefore if you want to install only the **LABEL ARCHIVING Server**, you must make sure that UMSS/MSGS has already been installed.

Step 3 > Select the database type that you want to use.
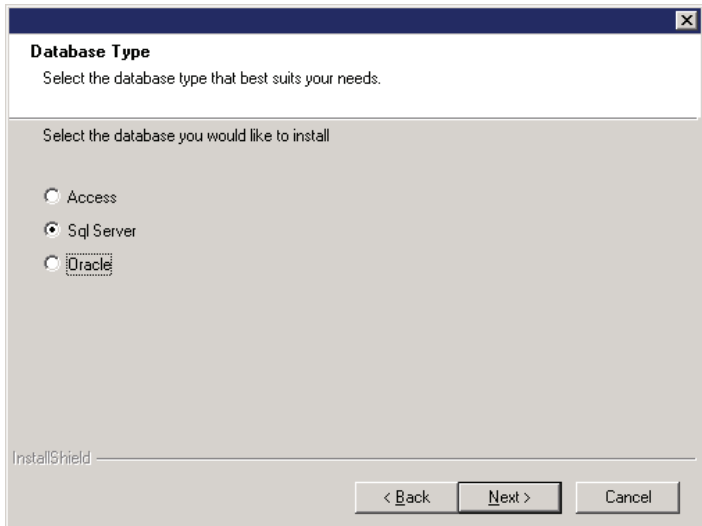
Figure 4 Database Type

If you select an SQL Server type DBMS, you will be asked to enter the instance of the desired SQL Server (choose from the drop-down menu or search for a specific location by clicking on **Browse...**).
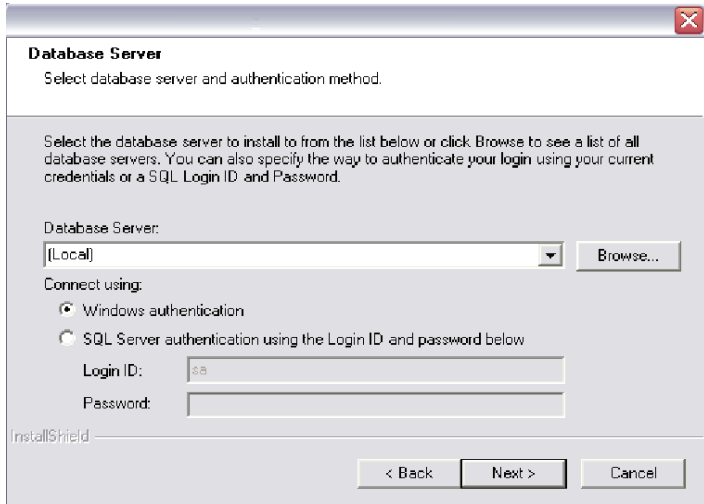
Figure 5 Database Server

Special installation instructions for SQL configurations with "named instances":

During the ARCHIVING Server installation, the wizard may display several possible Database Servers, for example:

1 - (Local)/*DB instance name*

2 -*(Workstation name)/DB instance name*

You must select an item that contains a workstation name to ensure a correct connection. In our example, you must choose item #2.

Step 4 > Select the Web site on which you want to deploy the ARCHIVING Server Web.
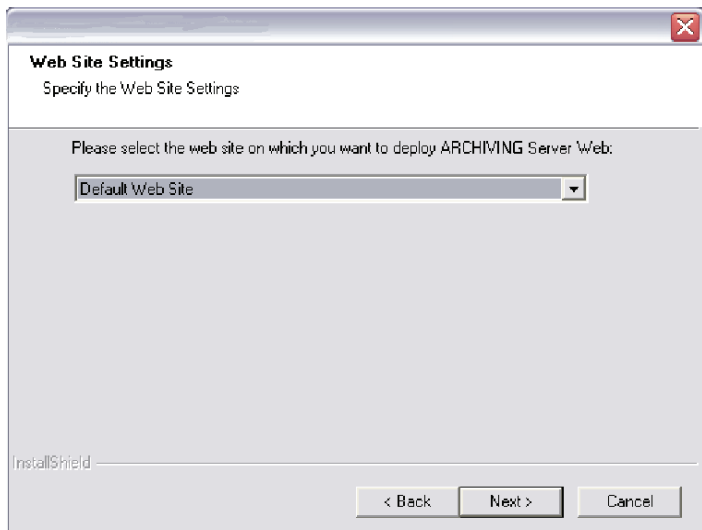
Figure 6 Web Site Settings

Step 5 > Enter the name of the Web site's virtual directory.
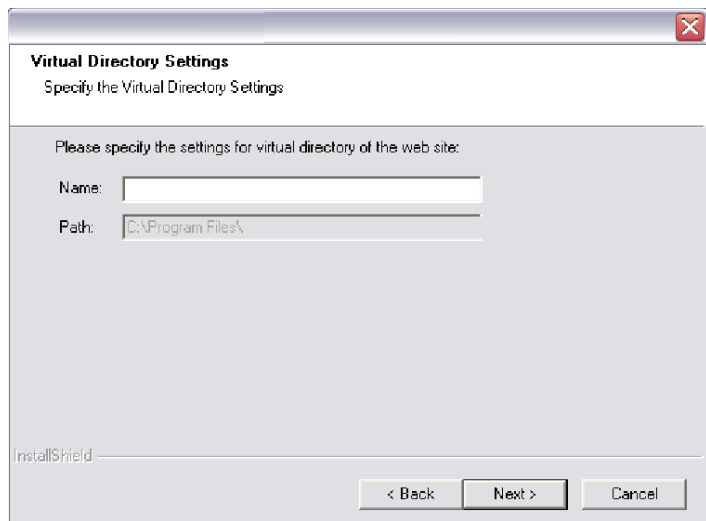
Figure 7 Virtual Directory Settings

**• Installing the
ARCHIVING Server
Web module**

If you are installing the ARCHIVING Server Web module **only,** you will be prompted with the ARCHIVING Server Settings window. This window allows you to select the ARCHIVING Server address and ensure that the ARCHIVING Software is already installed and ready to run.
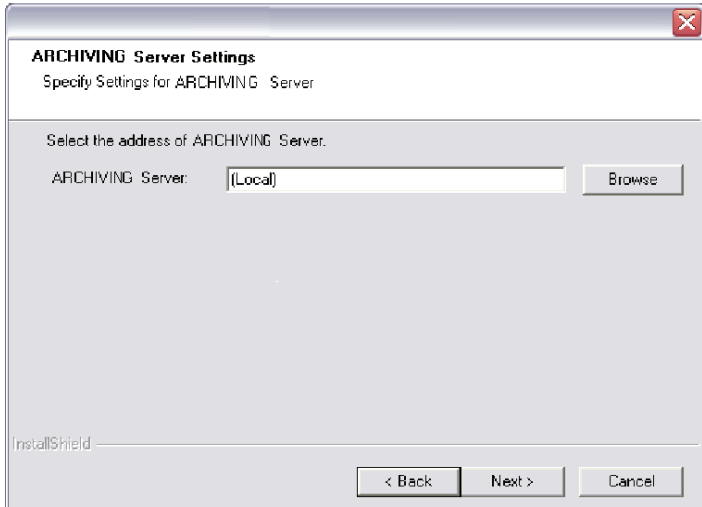
Figure 8 ARCHIVING Server Settings

**• Installing the
ARCHIVING Server**

If you are installing the **ARCHIVING Server** component **only**, you will be prompted with the UMSS and MSGS Servers window so that you can specify the location of the UMSS/MSGS server.
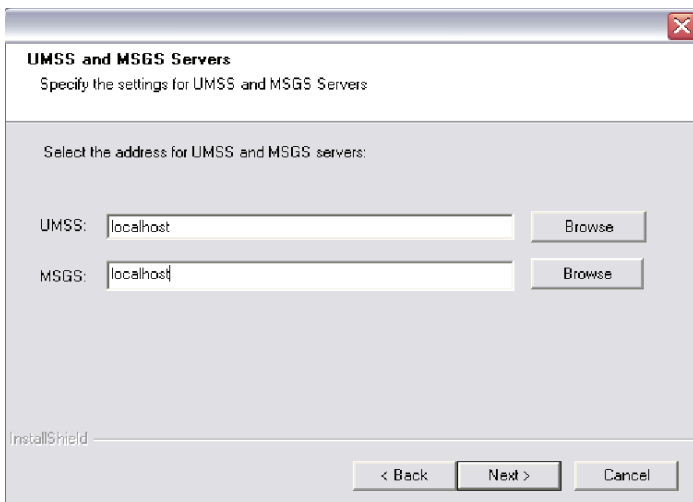
Figure 9 UMSS and MSGS Servers

Step 6 > Final installation step: If you are sure that the parameters entered in the previous steps are correct, click **Install** to complete the installation. If you want to review or change any of your installation settings, click **Back**.
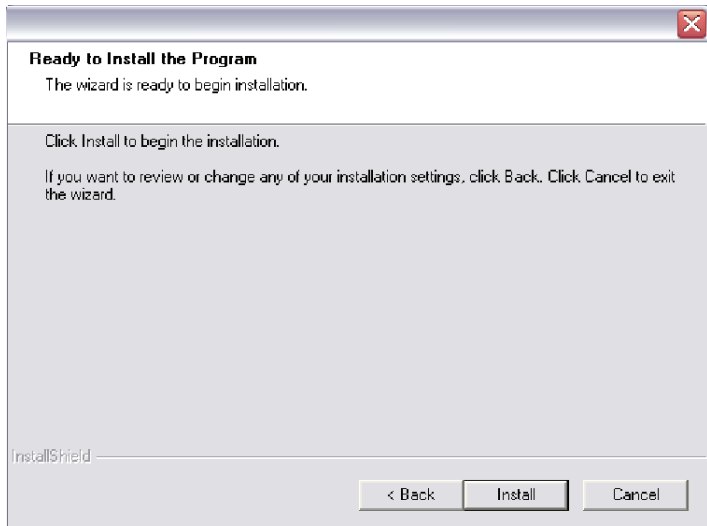
Figure 10 Ready to Install the Program

Software License Activation

You can use the ARCHIVING Software in trial mode for 30 days. After that period the server is blocked. Any connection attempt results in an error message "Maximum number of connections reached," and if you stop the ARCHIVING Software Windows service, you will not be able to restart it again. To continue to use the software you must activate the license.

To activate the software license:

Step 1 > Launch the **License Manager** from the Windows **Start** menu. A wizard is displayed.

Step 2 > Choose **Activate** and follow the wizard screens. You will need to enter the activation code that was provided to you when you purchased the software.

Note

If you activate the license once the trial period is expired, you will need to reboot the ARCHIVING Server

computer.

ARCHIVING Server Web Module Configuration

After installing **the ARCHIVING Server Web Module**, you should verify the Web site settings:

Step 1 > Go to **Control Panel > Administrative Tools > Internet Information Services**.

Step 2 > In the navigation frame on the left, navigate to the Web virtual directory folder (i.e., (local computer) \ Web Sites\ Default Web Site \ LAS).

Step 3 > Right-click on the Web virtual directory folder (i.e., the LAS folder) and select **Properties**.

Step 4 > Click on the **ASP.NET** tab.

Step 5 > Verify that the **ASP.NET version** is set to **2.0.50727**.
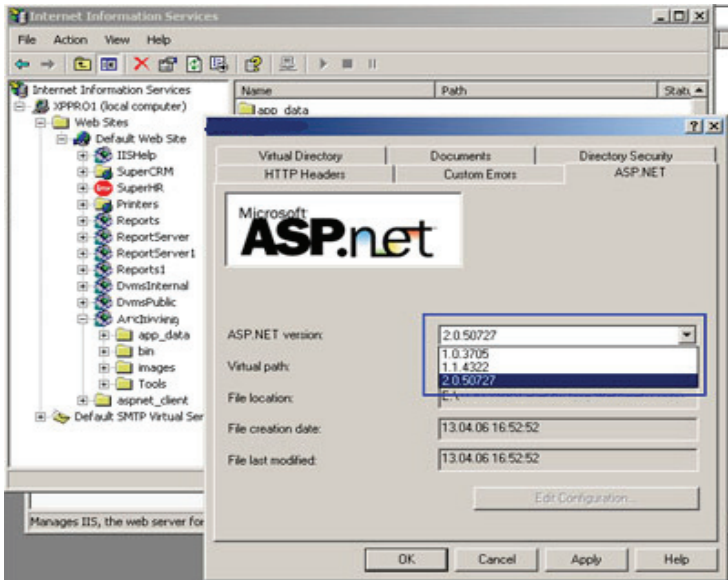
Figure 11 Web Site Properties

Install Oracle database

Prerequisite

It is indispensable to have installed Oracle Client on Archiving Server software before installing Oracle database.
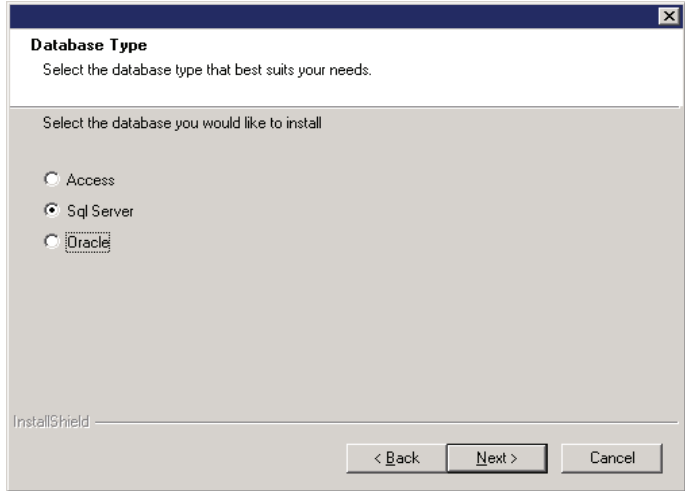
Figure 12 Database type

Step 1 > Select Oracle.
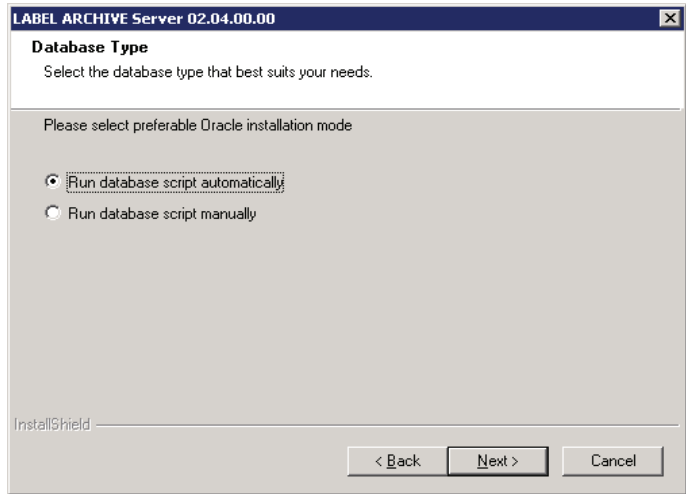
Figure 13 Oracle installation mode

The installation process of **Archiving Server** should propose two options regarding database creation on Oracle.

• create it automatically,

• let user runs an sql script to create manually after the install.

Automatic installation mode
Automatic mode creates and/or updates tables uzed by **Archiving Server** and **UMSS/MSGS** on **Oracle database** thanks to the SQL scripts.
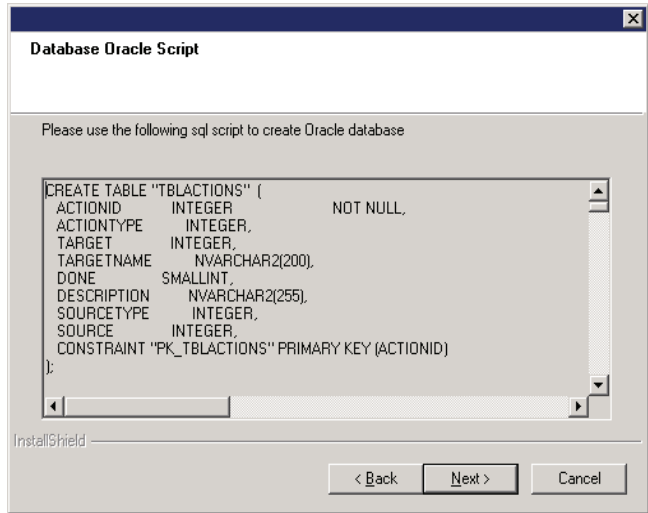
Figure 14 Database Oracle script.

Click **Next** to continue the installation.
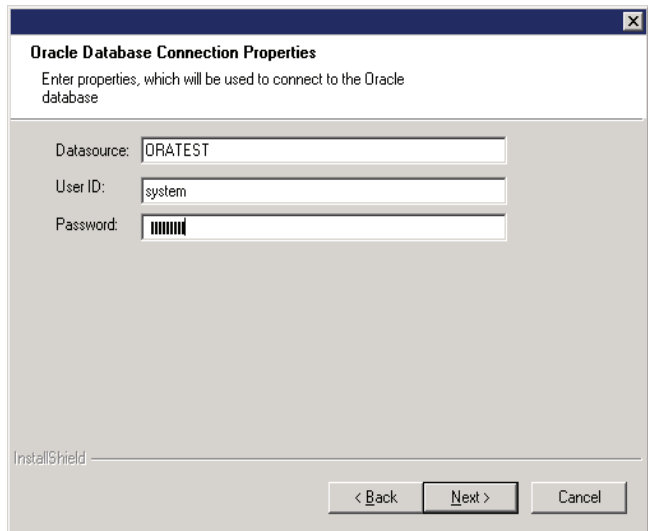
Figure 15 Oracle Database Connection Properties.

Datasource: allows to give a name to the **Oracle Database**.

User ID: allows to define the identy or the user name which will be used to connect to the **Oracle Database**.

> During installation, the user defines a system operator in order to have the necessary rights to the creation of tables in the **Oracle Database**.

Password: allows to define a password.

Click **Next** to install the **Oracle Database** and to connect to it.

Manual installation mode The installation displays the script of tables creation in **Oracle Database** that are necessary for the proper functioning of the application. Script can be use manually to create tables.

Uninstallation

To remove the different server components from your computer:

Step 1 > Go to **Control Panel > Add or Remove Programs**.

Step 2 > Select **the ARCHIVING Server** and click on **Change/Remove**.

Step 3 > In the next window, select the **Remove** option and click on **Next**.
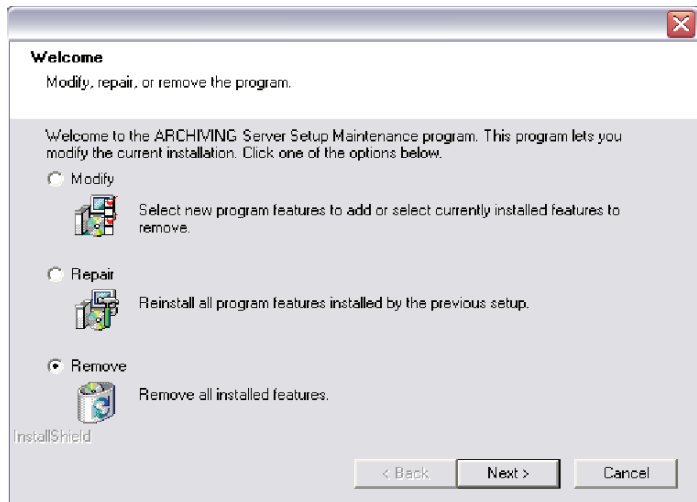
Figure 16 Modify, Repair, or Remove the Program

The uninstallation program asks you:

• Do you want to delete Databases: ARCHIVING Server, UMSS, MSGS? (if you used SQL Databases)?

- or -

• Do you want to backup Databases: ARCHIVING Software, UMSS, MSGS? (if you used Access Databases)?

The uninstallation program will delete the installed components from your computer and optionally the databases if specified.

ARCHIVING Software Repair

If the installed **ARCHIVING Server components** proved to be corrupted, you can fix them by using the **Repair** mode (see Figure 12).

In this mode the setup will reprocess the installation of the different components. The installation settings that you entered during the last installation will be reused.

SQL Database: In this mode the structure of SQL Database will be repaired (for example, if your SQL database structure was corrupted).

Access Database: In this mode the Access Database will be overwritten, but before starting the repair process, the setup will propose to "Create backup-files for your Databases," and after the repair you will be able to replace the database.

ARCHIVING Modification (Add/Remove Features)

If you want to add components which were not previously installed, you can use the **Modify** mode (see Figure 12). In this mode the setup will propose to select the components to be installed.
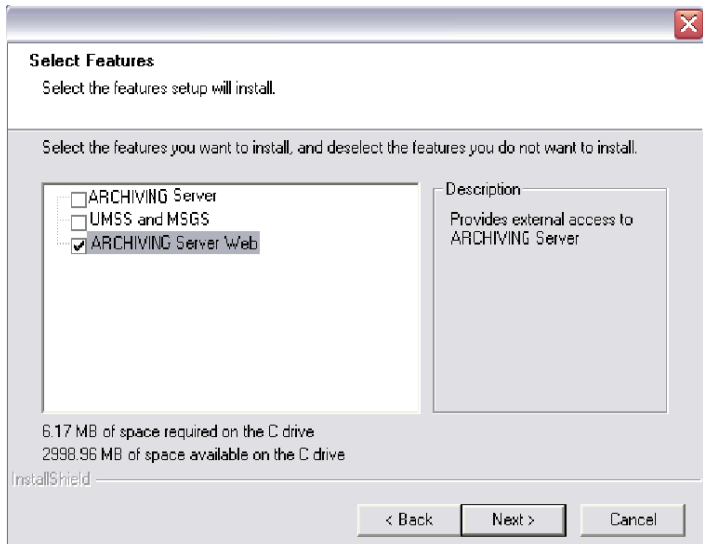
Figure 17 Modify Features

Configuring E-mail Sending

In order for **the ARCHIVING Software** to send e-mail notifications, an e-mail sending action must be created in the MSGS subsystem. For more details about how to use MSGS, please refer to your MSGS guide.

To configure e-mail sending:

Step 1 > Connect to the MSGS subsystem (accessible from the **UMSS-MSGS Servers Administration** shortcut).

Step 2 > Create a standard filter for the LAS application with the following property:
MSGCODE = MSG_SENDMAIL.

Step 3 > Create an SMTP action handler, and indicate the parameters that your company uses for sending e-mails through SMTP protocol (**Configuration** button).

.
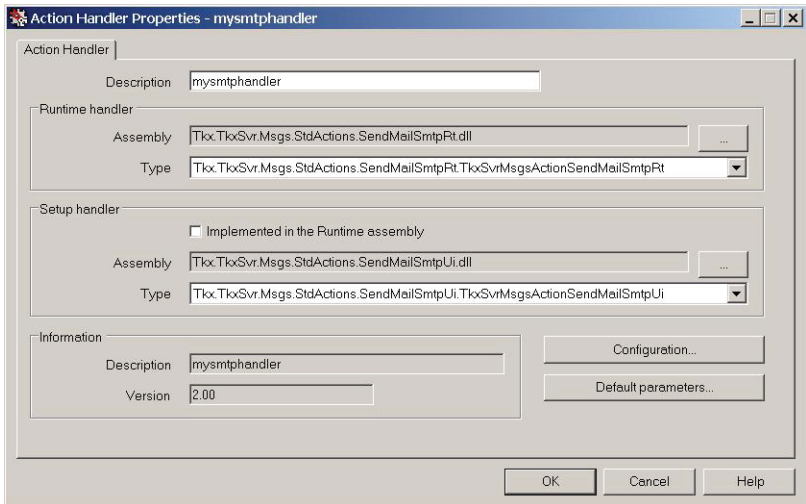
Figure 18 SMTP Action Handler Properties

Step 4 > Create an action that uses your filter and your action handler. In the parameters zone, indicate the following four variables:**%TONAME%,%TOADDRESS%, %SUBJECT%,%MSGTEXT%**.
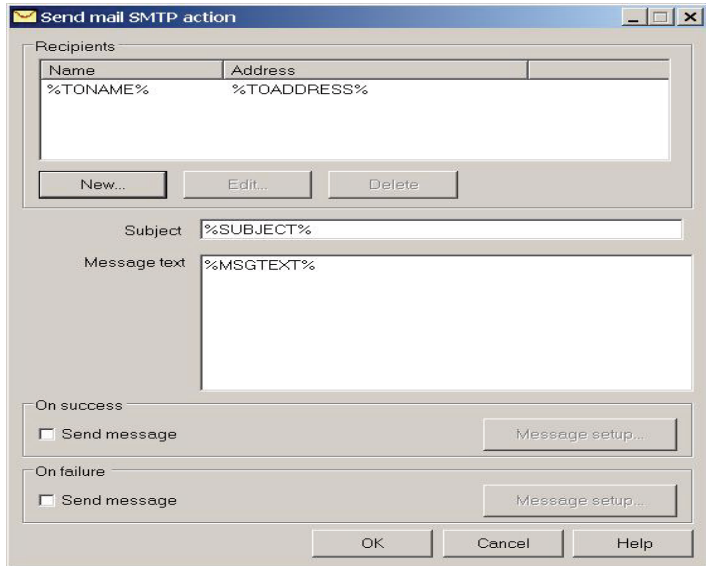
Figure 19 E-mail Configuration

Your e-mail sending mechanism is ready for use.

Later on, when **the ARCHIVING Software** will need to send e-mail notifications, it will automatically create internal MSGS messages. These MSGS messages will be instantly captured by the MSGS action that you just created and which is permanently waiting in background. The action will populate the different variables and send e-mails via the SMTP server.

Note

When declaring the SMTP server, make sure that the SMTP provider allows sending e-mails from the network where the ARCHIVING Server is installed.

Managing Users and Permissions

The ARCHIVING Software uses the UMSS subsystem to manage all users and permissions. At any time the administrator can create, modify, or delete users, passwords, and user groups. For more details about permissions management, please refer to your UMSS administrator's guide.

In UMSS, when you create a new user for **the ARCHIVING Software**, you must not choose authentication "Windows" in the parameters of that user. Please **choose "UMSS" authentication only**.

Predefined User Profiles

At install time, the system creates predefined User Groups. These groups correspond to typical profiles that a company may need to use to manage the different user permissions for all **the ARCHIVING Software** business processes.

Five different user groups are available:

• ADMINISTRATORS Administrators have all rights on **the ARCHIVING Software**, and also on UMSS and MSGS subsystems. Their typical role is to be in charge of the IT responsibility of the entire system.
A default **Administrator** user is provided. Its initial password is "**admin**".

Additional users can be created and assigned to the **Administrators** group.

• MANAGERS Managers' typical role is to be in charge of the business data and processes of **the ARCHIVING Software**. Managers can define system settings, create approval workflows, or be required to approve documents before delivery in production.

Compared to Administrators, Managers do not have permission to administrate the database or define workstation settings. They cannot perform operations like import DB, export DB, force undo check-out, DB archive, or manage workstations.

A default **Manager** user is provided. Its initial password is empty.

Additional users can be created and assigned to the **Managers** group.

• DESIGNERS
Designers' typical role is to be in charge of the creation and management of a document or a set of documents. Designers can create documents, modify documents, check-in new versions, submit documents for approval, and participate in approval processes.

Compared to Managers, Designers do not have permission to modify system settings, create or modify approval schemes, or modify categories.

A default **Designer** user is provided. Its initial password is empty.

Additional users can be created and assigned to the **Designers** group.

• PRINTUSERS
Print Users' typical role is to open documents and print them in production.

Different from Designers, Print Users do not have permission to modify documents, and they can only access documents that are in Final state.

Print Users can use the Run-Time version of the Label Designer to carry on their activities.

A default **PrintUser** user is provided. Its initial password is empty.

Additional users can be created and assigned to the **PrintUsers** group.

• CUSTOMERS
In some cases, documents may need to be approved by Customers before delivery in production.

Customers, therefore, are given minimum access to the system, including browsing their documents and all related details, and taking part in an approval workflow.

Customers can use the **the ARCHIVING Server Web Module**, through an Internet browser, and receive notifications by e-mail.

A default **Customer** user is provided. Its initial password is empty.

Additional users can be created and assigned to the **Customers** group.

> You can freely modify, customize or delete the predefined groups, users and permissions, except for the Administrator.

Note

To view all permissions that are granted to a given User, select the related Group from the "User Groups" node in UMSS, and click on the Permission tab.

Changing the "Administrator" Password

The predefined **Administrator** user is also used by the **ARCHIVING Software** system itself.

Its initial password is *admin*. If you change this password, you will also need to manually change the configuration file of **the ARCHIVING Server**.

> After such an operation, if you do not update the **ARCHIVING Serve**r configuration file accordingly, the system will not work properly.

How to Update the Config File

The configuration file to be updated is called "TkxArv.server.config". It is located in the installation directory.

Once you have opened "TkxArv.server.config", go to the following xml section: <configuration>, then <tkxsvr>, <umss>, <client>.

You will find the <logonconfig> tag, which has the following elements: defaultusername (Administrator), and defaultpasswordhash, (hash for 'admin' password).

Replace the old password hash value with the new password hash value.

The password hash value is stored in the UMSS 'USERS' table, within the 'PASSWORDHASH' field.

Once the replacement is done (using copy/paste), you must restart the **the ARCHIVING Server** Windows service.

Note

Through proper management of security and access rights on the databases and the server system, you can ensure that only authorized users can perform such operations.

Note

You can also create additional users and give them administrator rights, by assigning them to the Administrators group.

Special Notes

- The user interfaces to administrate **the ARCHIVING Server** and **Client** are made using the MMC (Microsoft Management Console) snap-in, so they can be manipulated like any standard MMC component in Windows.

- If you want to install the database on a computer that is different from the one that hosts the **ARCHIVING Server** processes and services, then full SQL Server is required.

- Remote SQL Server running on Windows 2000 should have Service Pack 4 installed.

- If you install **the ARCHIVING Software** with the Access database, the database is protected by a password, initially set to *tkllas*. To replace it with a

new password, edit "TkxArv.server.config". This file is located in the installation directory. Once the file is opened, type the new password in the following xml section:

<configuration>, then <TkxArv.DataAdapters>, <DataAdapter name="oledb"....Password= ***newpassword***>. Then stop/start the "Archiving Server" Windows service.

• For SQL Server 2005, make sure that remote connections are allowed (disallowed by default).

• If you have a firewall, you must unblock ports 8088 and 8989.

• "The ARCHIVING Server" Windows service: The Server program is run through a Windows service named "Archiving Server," which is configured by default to start automatically. The service has a dependency link with the UMSS/MSGS Windows service, named "TkxSvr Servers service." You can start and stop Windows services manually by using the standard Windows administration tool.

Before doing administration work on **the ARCHIVING Server** (i.e., changing parameters and options, importing/exporting data, etc.), it is highly recommended to first ensure that all clients are disconnected. If you change some settings, you may then want to stop and restart the "Archiving Server" Windows service for all changes to be effective.

ARCHIVING Server Client Installation

System Requirements

The basic software and hardware requirements needed to run the **Client** are:

- A PC with Windows® 2000 SP4, Windows® XP SP2, Windows® Server 2003 SP2, Windows® 2008 or Windows® Vista (32 or 64 bits)

- 256 MB RAM minimum (512 MB recommended) and 1 Ghz processor for Windows® 2000 systems

- 1GB RAM minimum (2 GB recommended) and 2 or 3 Ghz processor for Windows® 2003, 2008 or Vista systems

- A VGA monitor or better

- A hard drive with at least 500 MB of free disk space

- Microsoft .NET Framework 2.0

- A Label Designer product and version that is compatible with this version of the ARCHIVING Software.

Installation

Before running the installation program, check the configuration of your PC.

To install **the ARCHIVING Server Client**:

Step 1 > Place the CD-ROM in the appropriate drive.

The **ARCHIVING Software** CD window appears. Select **the ARCHIVING Server Client** and click on **Install**.

If the CD-ROM does not start up automatically, go to **Start > Run**, type **cdsetup.exe**, and click **OK**.

Step 2 > The **Installation Wizard** will appear. Click **Next**.

Step 3 > Read the license agreement. If you agree with the license agreement, select "I accept the terms of the license agreement" and click **Next**.

License Agreement
Please read the following license agreement carefully.

Braton Groupe sarl License Agreement

Braton Groupe sarl (hereafter "Braton") or its affiliated companies hereby grants you a non-exclusive, nontransferable license to use this software and the accompanying documentation according to the following terms:

LICENSE GRANT - You may
1) install the software on the number of computers covered by invoices for this license from Braton, which are hereby incorporated by reference;
2) use and transmit the software on a network within a site if authorized by an invoice from Braton; and

○ I accept the terms of the license agreement

○ I do not accept the terms of the license agreement

Print

InstallShield

< Back   Next >   Cancel

Figure 1 License Agreement

Step 4 > Enter the required customer information.

Please indicate:

- User Name

- Company Name

- Who will be able to use this application: only you or anyone who uses the computer

Figure 2 Customer Information

Step 5 > Choose the Destination Location.

At this stage you can choose the folder where the files will be installed.
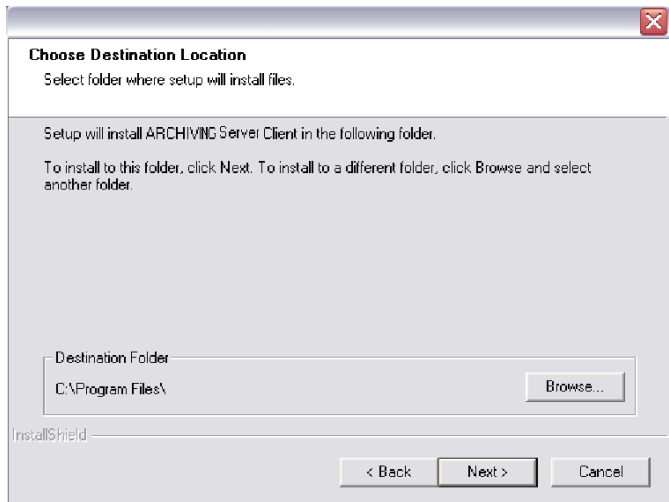
Figure 3 Choose Destination Location

Step 6 > Select the **ARCHIVING Server** name.

Select the name of the **ARCHIVING Server** machine to_which the Client will connect.
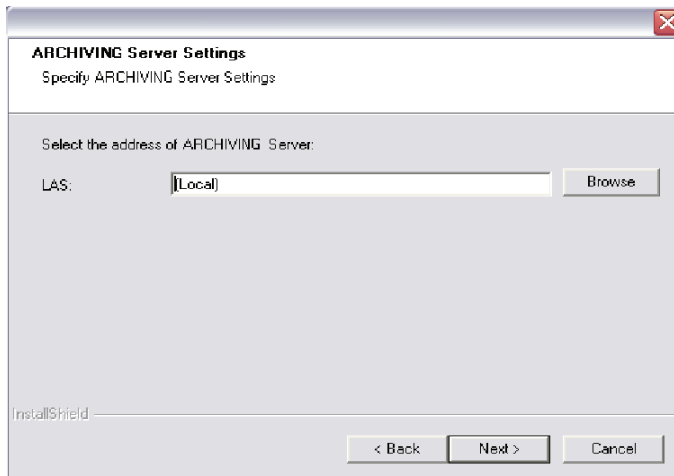
Figure 4 ARCHIVING Server Settings

If you are sure that the parameters entered in the previous steps are correct, click on **Install** to continue the installation.

If you want to review or change any of your installation settings, click on **Back**.
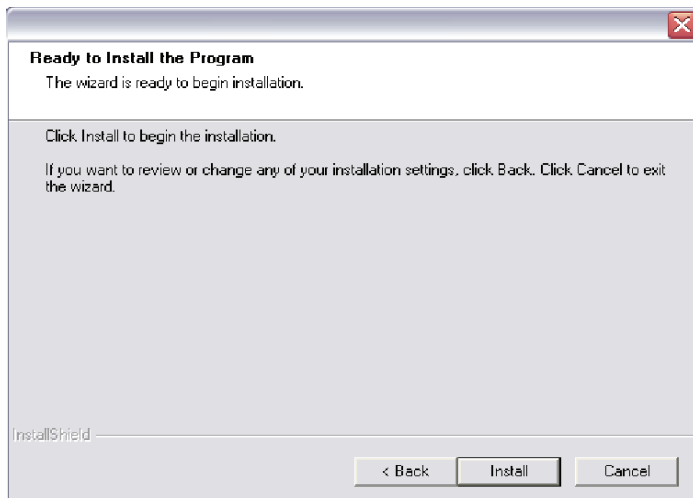
Figure 5 Ready to Install the Program

Uninstallation

To remove the **ARCHIVING Server Client** from your computer:

Step 1 > Go to **Control Panel > Add or Remove Programs**.

Step 2 > Select **the ARCHIVING Server Client** and click on **Change/Remove**.

Step 3 > In the next window, select the **Remove** option and click **Next**.
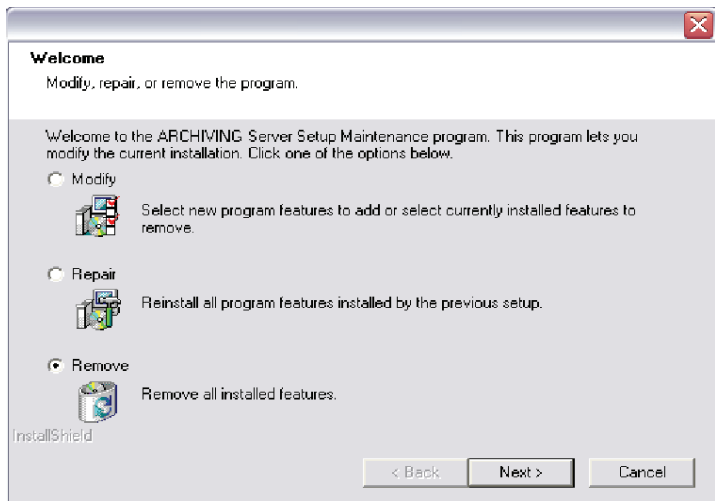
Figure 6 Repair or Remove the Program

The uninstallation program will delete the installed components of **the ARCHIVING Server Client** from your computer.

ARCHIVING Server Client Repair

If the installed **ARCHIVING Server Client** proved to be corrupted, you can fix it using the **Repair** mode.

In this mode the system will redo the installation of **the ARCHIVING Server Client**. The installation settings that you entered during the last installation will be reused.

ARCHIVING Server Administration

Logging In
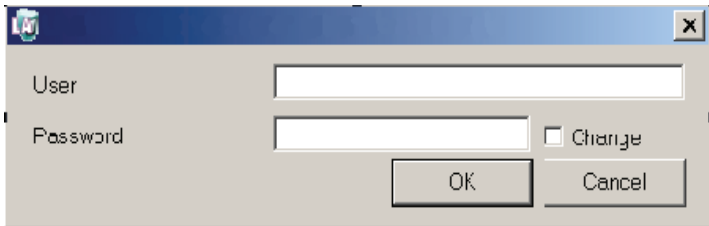
Figure 1 ARCHIVING Server Administration Login

To launch **the ARCHIVING Server Administration**:

Step 1 > Launch **the ARCHIVING Server Administration** from the Windows **Start** menu.

Step 2 > Type a valid user name and password (i.e., defined in UMSS and having appropriate permissions).

The **Change** check box allows changing the password at any time.

General Layout
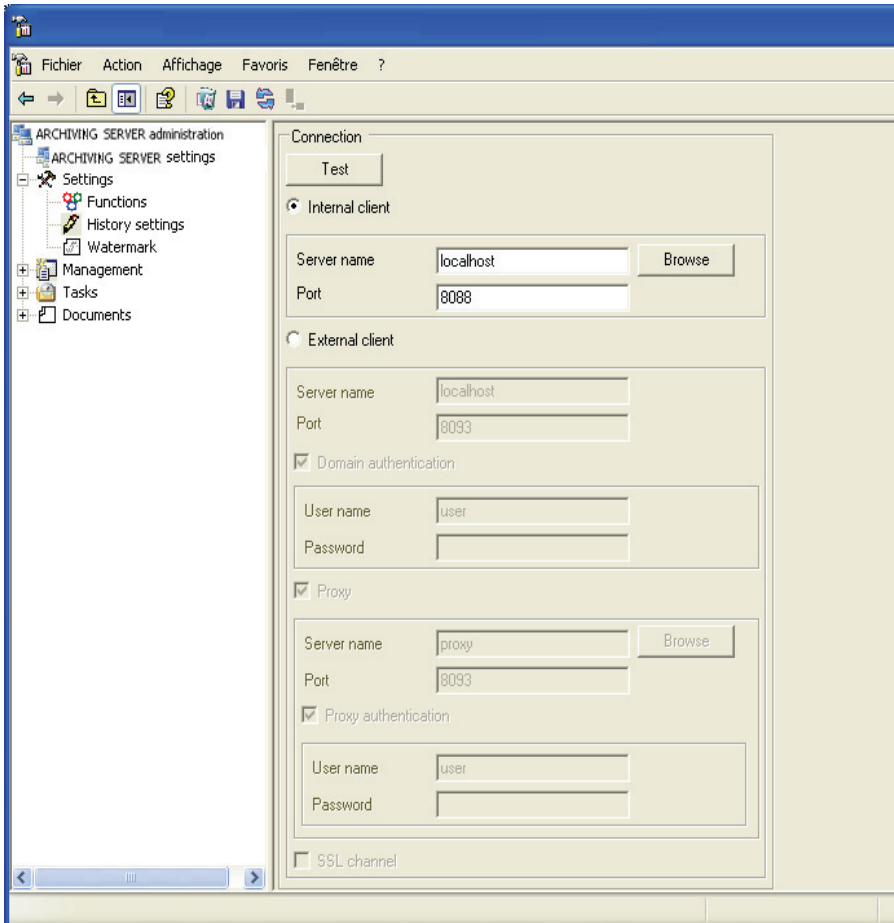
Figure 2 ARCHIVING Server Administration

Upon successful login, the Administration window will appear.

This window allows changing different settings for the **ARCHIVING Server** module.

Note

The settings for the client are accessible from the ARCHIVING Client Administration.

General Layout

The layout of the Administration window of **the ARCHIVING Server** follows the **Microsoft Management Console (MMC)** standard.

Three buttons are added to the default set of MMC:

Save: Saves all changes made in the current window.

Refresh: Cancels all changes made in the current window and refreshes its state.

Add: Context-dependent button to create additional items.

Navigation Tree

In this tree control the user can select all functions available in the Administration program.

Depending on the selected node in the navigation tree, the right-side work panes are updated.

Work Pane

Depending on the selected node in the navigation tree, the work pane displays the associated settings.

Navigation

Single functions are chosen by selecting a node in the navigation tree. When there is no functionality for a parent node, a page is shown to indicate that you must select a subnode.

Archiving Server Settings node

To access the Server Settings node:

Step 1 > Launch **the ARCHIVING Server Administration** from the Windows **Start** menu.

Step 2 > Select the **Archiving Server Settings** node in the navigation tree.

This node allows to set up the connection to the **ARCHIVING Server**. The user must select an **Internal client** or an **External client** connection.

• **Internal Client**   Specifies the settings for the internal client (this is a client that is located on the same network domain as the ARCHIVING Server). In this case, the TCP protocol is used.

   • **Server name** – specifies the name of the ARCHIVING Server.

   • **Browse button** – allows the user to search for the ARCHIVING Server in the internal network.

   • **Port** – specifies the port of the ARCHIVING Server (8088 by default).

• **External Client**   Specifies the settings for the external client (this is a client that connects to the ARCHIVING Server via the Internet). In this case, the HTTP protocol is used and all content, which is transmitted between client and server, gets encrypted.

   • **Server name** - specifies the name of the ARCHIVING Server.

   • **Port** – specifies the port of the ARCHIVING Server (8080 by default).

   • **Domain authentication** – If the ARCHIVING Server is installed on a network domain that requires authentication, authentication settings must be specified.

   • **User Name** – specifies the user name to use for logging in to the network domain.

   • **Password** – specifies the password.

• **Proxy**   The ARCHIVING Server may be installed on a PC, which is placed behind a proxy. In this case, the proxy settings should be set.

   • **Server Name** – specifies the name of the proxy;

   • **Browse button** - allows the user to search for a proxy on the internal network

   • **Port** – specifies the proxy port;

- **Proxy authentication** – the proxy may require authentication. In this case, user credentials should be set:

- **User Name** – specifies the user name.

- **Password** – specifies the password.

Settings Node

To access the Settings node:

Step 1 > Launch **the ARCHIVING Server Administration** from the Windows **Start** menu.

Step 2 > Select the **Settings** node in the navigation tree.

This node allows changing functional, history and watermark settings for **the ARCHIVING Server**.

When you select the **Settings** node, the **Functions**, **History** and **Watermark** subnodes become available.

Functions Subnode

To access the Functions subnode:

Step 1 > Launch **the ARCHIVING Server Administration** from the Windows **Start** menu.

Step 2 > Select the **Settings** node in the navigation tree.

Step 3 > Select the **Functions** subnode in the **Settings** node.

This subnode allows changing functional settings for **the ARCHIVING Server**.

The following settings are available in this subnode:

- **Archiving**

When the archiving is switched **On**, the versioning is active for all documents. At check-in a document can no longer be overwritten and a new version needs to be created. When the archiving is switched **Off**, the document version number is not increased at check-in. New documents overwrite previous ones.

- **Approval**   If approval is **Off**, then only the **Final** state can be assigned to documents. If approval is **On**, then at least two document states can be assigned: **Draft** and **Final**.

- **3-state Approval** **3-state Approval** can only be activated if **Approval** is enabled. When it is **On**, the **In Approval** state can be chosen for documents.

  Note

  The following settings: Archiving, Approval, and 3-State Approval are defined both at category level in the ARCHIVING Client Administration, and at global level in the ARCHIVING Server. To be activated for a given document, they need to be switched ON both at category level and at global level.

- **Allow Check-in**   When **On**, **the ARCHIVING Server** allows read/write access to documents. When switched **Off**, the documents can only be read. This setting is a global setting for all documents in **the ARCHIVING Software.** It overrides the individual user permissions (set in UMSS).

- **Only work with the** This setting affects the Label Designer application. When
  ARCHIVING Software switched **On**, the Label Designer will not allow working with documents that are stored in the Windows file system.

- **Password required** Defines whether user password confirmation is required to
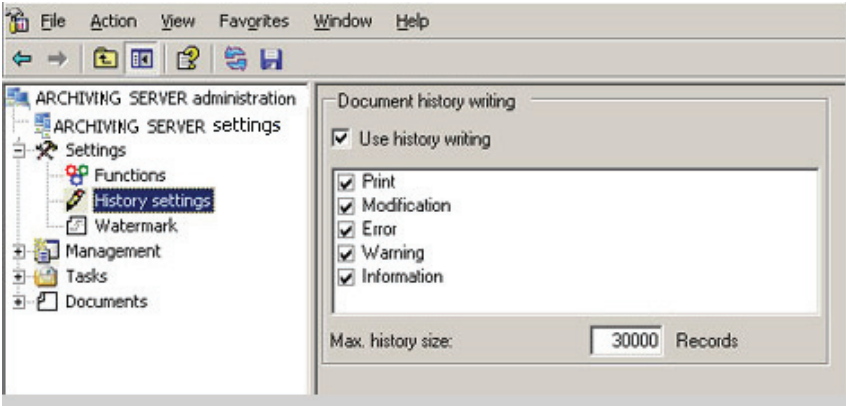 **in approval**   complete the approval process.

  The **Languages** options allow you to specify the desired language for the user interface.

  Note

  For a language change to be fully effective you need to close and re-open the application.

  Web site settings allows you to set the URL of the **ARCHIVING Server Web Module** and browse to it using **Open**.

History Settings
Subnode

Figure 3 History Settings Subnode in Settings

To access the History Settings subnode:

Step 1 > Launch **the ARCHIVING Server Administration** from the Windows **Start** menu.

Step 2 > Select the **Settings** node in the navigation tree.

Step 3 > Select the **History Settings** subnode in the **Settings** node.

This subnode allows changing the history trace settings of **the ARCHIVING Software**.

The following settings are available in this subnode:

Use History writing: This is a global setting that determines whether the client application can write history entries into the database or not. When switched **On**, the history writing options are enabled, allowing you to define which history entries will be stored. When switched **Off** (or when no history writing options are selected), future client history events will not be stored in the database.

Print: When switched **On**, the PRINT HISTORY entry will be written to the database after each print job.

Modifications: When switched **On**, the MODIFICATION HISTORY entry will be written to the database after each change saved to any document.

Errors: When switched **On**, the ERROR HISTORY entry will be written to the database after error events.

Warnings: When switched **On**, the WARNING HISTORY entry will be written to the database after warning events.

Information: When switched **On**, the INFO HISTORY entry will be written to the database after information events.

Watermark Subnode
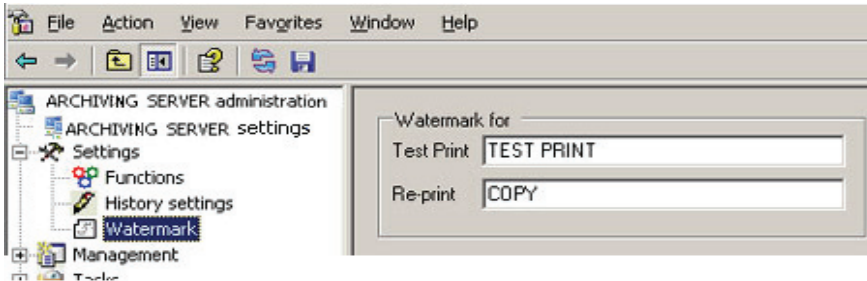
Figure 4 Watermark Subnode in Settings

To access the Watermark subnode:

Step 1 > Launch **the ARCHIVING Server Administration** from the Windows **Start** menu.

Step 2 > Select the **Settings** node in the navigation tree.

Step 3 > Select the **Watermark** subnode in the **Settings** node.

This subnode allows changing watermark printing settings for **the ARCHIVING Server**.

The following settings are available in this subnode:

TestPrint: Specifies the text which will be printed over the document when a user performs a test print (printing a

preview) of the ARCHIVING Software document. When it is left empty, no watermark is printed.

Re-print: Specifies the text which will be printed over the document when a user performs a reprint of the ARCHIVING Software document. When it is left empty, no watermark is printed.

Management Node

To access the Management node:

Step 1 > Launch **the ARCHIVING Server Administration** from the Windows **Start** menu.

Step 2 > Select the **Management** node in the navigation tree.

This node allows reviewing the **ARCHIVING Software** database statistics, connection and workstation information.

Figure 5 Management node

When you select the **Management** node, the **Database Information**, **Workstation Settings,** and **Connections** subnodes become available.

**Database
Information
Subnode**
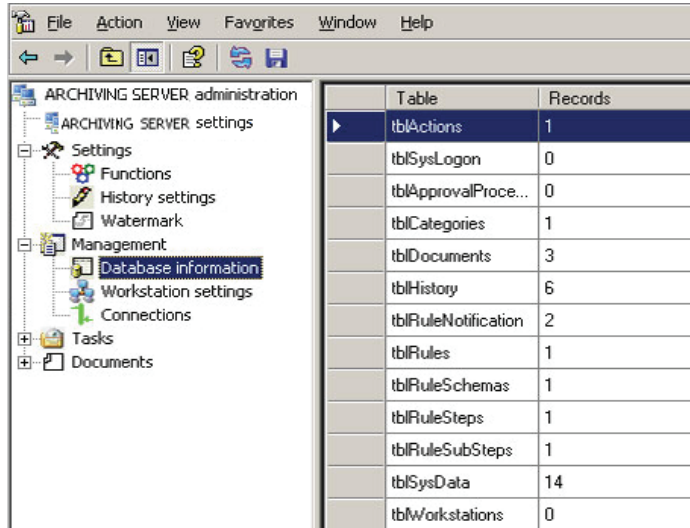
Figure 6 Database Information subnode in Management

To access the Database Information subnode:

Step 1 > Launch **the ARCHIVING Server
Administration** from the Windows **Start** menu.

Step 2 > Select the **Management** node in the navigation
tree.

Step 3 > Select the **Database Information** subnode in the
Management node.

This subnode allows you to view statistical information on
the **ARCHIVING Software** tables in the database, tables list
and number of records per table.

 Note

**The tables of the UMSS and MSGS subsystems are not
displayed in this subnode.**

**Workstation
Settings
Subnode**

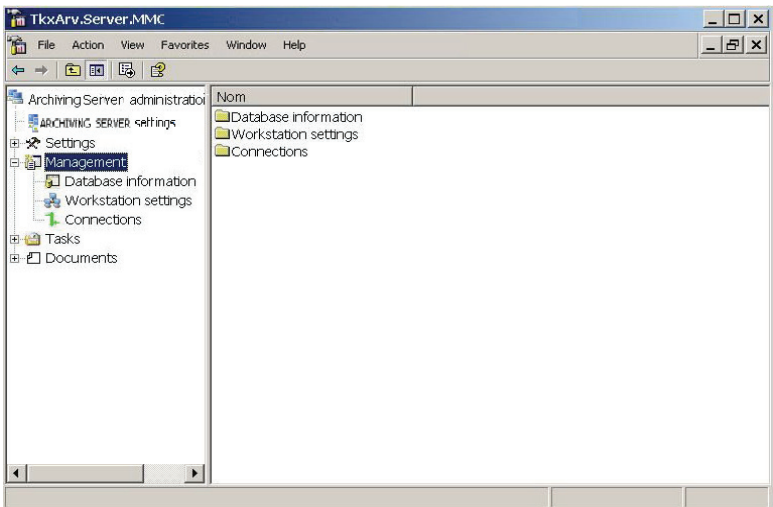**Figure 7** Workstation Settings subnode in Management

To access the Workstation Settings subnode:

Step 1 > Launch **the ARCHIVING Server Administration** from the Windows **Start** menu.

Step 2 > Select the **Management** node in the navigation tree.

Step 3 > Select the **Workstation Settings** subnode in the **Management** node.

This subnode allows defining workstations that will NOT receive notifications about user actions. For example, when setting up an automated system, you may not want document approval prompts to appear for certain workstations.

To add a new workstation to the list, click the **New** button, and then enter the workstation name in the corresponding **Name** text box. To save the changes, click **Apply**.

The following controls are displayed:

- **Apply**   Applies any changes made to the workstations list.

- **Refresh**   Displays the latest information about the workstations list from the database.

- **New**   Adds a new workstation to the list.

- **Delete**   Deletes a workstation from the list.

- **Auto action popup**   When unchecked, the workstation does not receive notifications about user actions.

Connections Subnode

Figure 8 Connections subnode in Management

To access the Connections subnode:

Step 1 > Launch **the ARCHIVING Server Administration** from the Windows **Start** menu.

Step 2 > Select the **Management** node in the navigation tree.

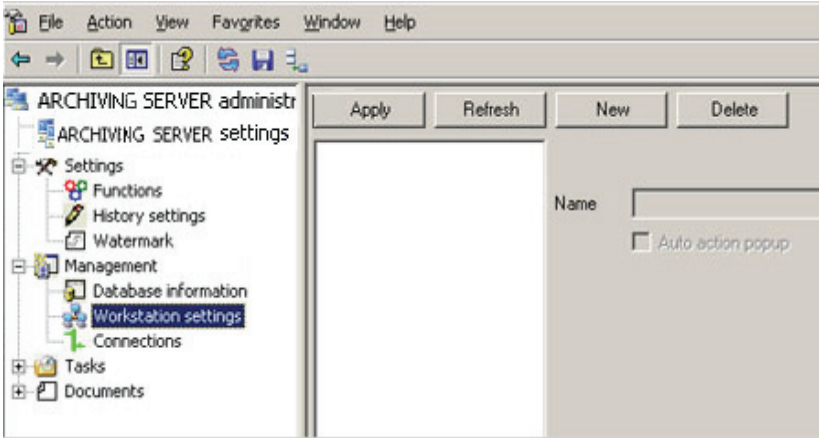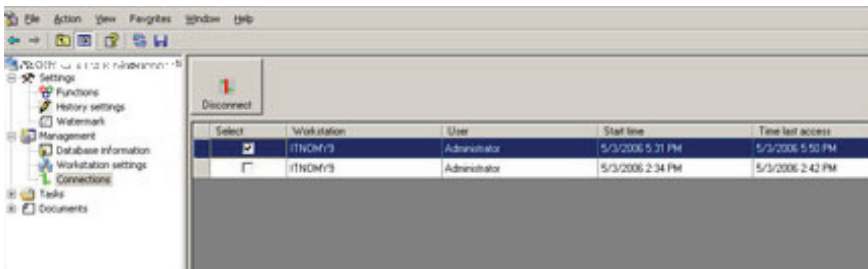**Step 3 >** Select the **Connections** subnode in the **Management** node.

This subnode shows the currently active connections to **the ARCHIVING Server**.

The **Disconnect** button allows disconnecting selected clients from **the ARCHIVING Server.**

Tasks Node

To access the Tasks node:

Step 1 > Launch **the ARCHIVING Server Administration** from the Windows **Start** menu.

Step 2 > Select the **Tasks** node in the navigation tree.

This node allows performing different operations with database documents, such as resetting states, archiving, import/export, etc.

When you select the **Tasks** node, the **Reset Documents**, **Delete History Records, Delete Documents and Data, Archiving, Export Database**, and **Import Database** subnodes become available.

Reset Documents Subnode

To access the Reset Documents subnode:

Step 1 > Launch **the ARCHIVING Server Administration** from the Windows **Start** menu.

Step 2 > Select the **Tasks** node in the navigation tree.

Step 3 > Select the **Reset documents** subnode in the **Tasks** node.

This subnode contains two additional subnodes: **Check out state** and **Valid from date**, which allow resetting documents based on the Checkout state or Valid from date.

The **Checkout state** subnode shows a list of all currently checked out documents.

Figure 9 Checkout State subnode in Reset Documents

If desired, you can select documents using the check box in the **Select** column, and then reset their state using the **Reset** button.

The **Valid from Date** subnode allows modifying that date for any document that is in **Final** state.
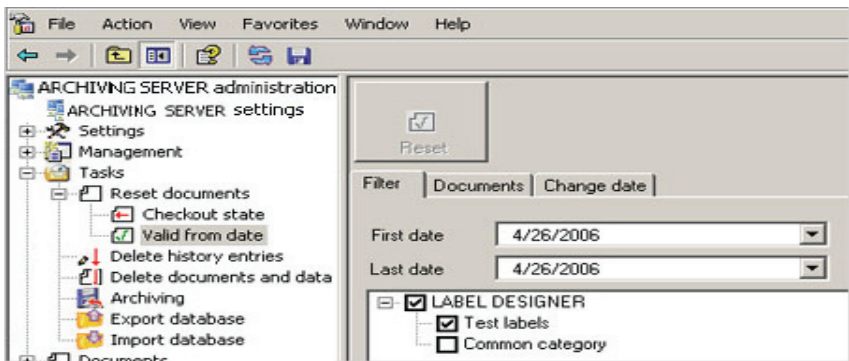
Figure 10 Valid from Date subnode in Reset Documents

The Valid from Date subnode contains three tabs:

Filter tab allows filtering **Final** documents by date interval and by category.

Documents tab allows selecting documents individually.

Change date tab allows changing the Valid from Date of selected documents.

If desired, you can select documents using the check box in the **Select** column, and then reset their Valid from Date using the **Reset** button.

Delete History Records Subnode

To access the Delete History Records subnode:

Step 1 > Launch **the ARCHIVING Server Administration** from the Windows **Start** menu.

Step 2 > Select the **Tasks** node in the navigation tree.

Step 3 > Select the **Delete History Records** subnode in the **Tasks** node.

This subnode allows deleting history records using state, date interval and category tree filters.

The Delete History Records subnode contains two tabs:

Filter tab allows filtering documents by date and category.

Documents tab allows selecting documents individually and then clicking on **Delete** to clear their history entries.

Figure 11 Delete History Records subnode in Tasks

Delete Documents And Data Subnode

Figure 12 Delete Documents and Data subnode in Tasks

To access the Delete Documents and Data subnode:

Step 1 > Launch **the ARCHIVING Server Administration** from the Windows **Start** menu.

Step 2 > Select the **Tasks** node in the navigation tree.

Step 3 > Select the **Delete Documents and Data** subnode in the **Tasks** node.

This subnode allows deleting documents from the **ARCHIVING Server** database using state and category tree filters.

The Delete Documents and Data subnode contains two tabs:

Filter tab allows filtering documents by state and category.

Documents tab allows selecting documents individually and then clicking on **Delete** to delete the documents.

Archiving Subnode

Figure 13 Archiving subnode in Tasks

To access the Archiving subnode:

Step 1 > Launch **the ARCHIVING Server Administration** from the Windows **Start** menu.

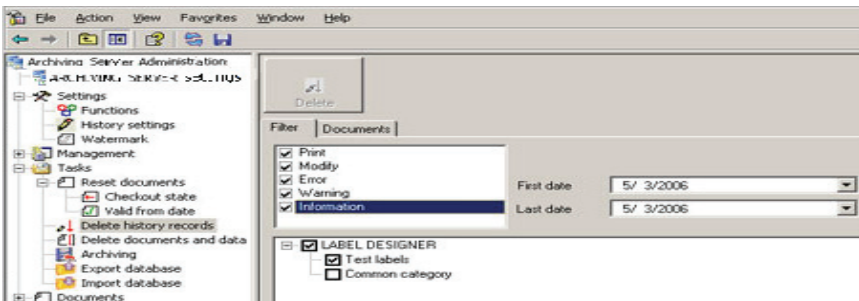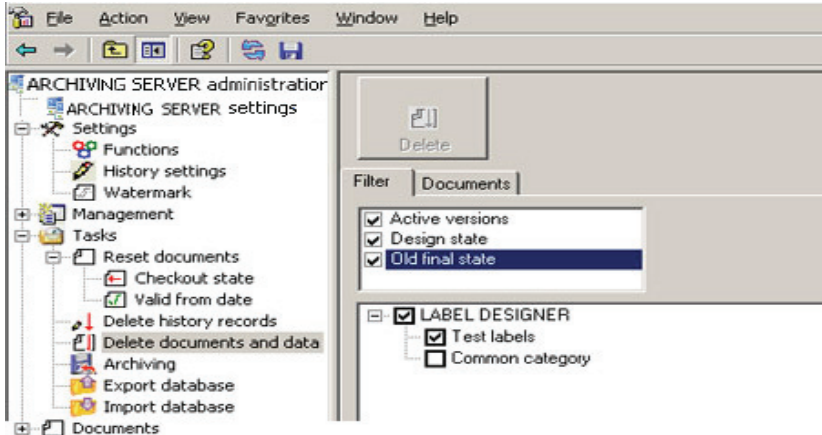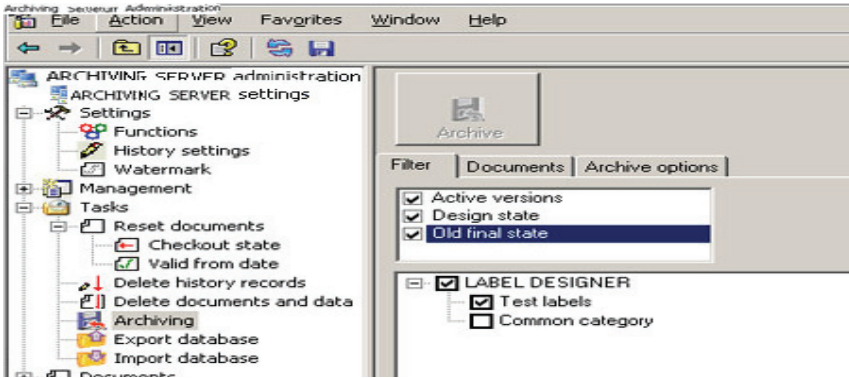**Step 2 >** Select the **Tasks** node in the navigation tree.

Step 3 > Select the **Archiving** subnode in the **Tasks** node.

This node allows archiving the **ARCHIVING Server** database to a Microsoft Access file (.mdb file). Filtering is performed by document state and by category. Please note that the **Archiving** task will create a backup of all database tables including approval rules, user actions, etc.

The Archiving subnode contains three tabs:

Filter tab allows selecting documents by document states (**Active versions**, **Design state**, **Old final state**) from the specified categories.

Documents tab allows selecting the desired documents for the archiving manually by selecting check boxes.

Archive Options tab allows specifying the Access database file (.mdb file) for the archiving in the **Database**

text field. The **Browse** button allows selecting a file from the list of existing databases or creating a new database archiving file. The **Delete after archive** check box allows removing the selected documents from the **ARCHIVING Software** database after performing the archiving operation.

The **Archive** button performs the archiving operation.

Export Database Subnode
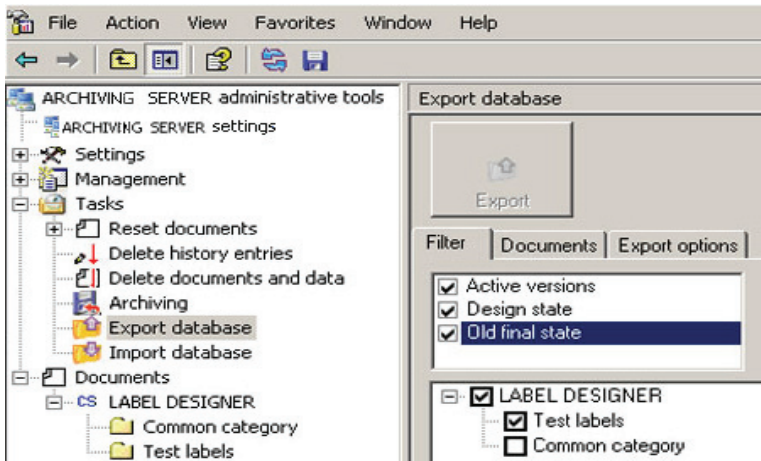
Figure 14 Export Database subnode in Tasks

To access the Export Database subnode:

Step 1 > Launch **the ARCHIVING Server Administration** from the Windows **Start** menu.

Step 2 > Select the **Tasks** node in the navigation tree.

Step 3 > Select the **Export Database** subnode in the **Tasks** node.

This subnode allows exporting the database to a Microsoft Access file (.mdb file). Please note that the **Export** task creates a backup only for documents, categories and sysdata database tables.

The Export Database subnode contains three tabs:

Filter tab allows selecting documents by document states (**Active versions**, **Design state**, **Old final state**) from the specified categories.

Documents tab allows selecting the desired documents for exporting manually by selecting check boxes.

Export Options tab allows specifying a database file for exporting in the **Database** text field. The **Browse** button allows selecting a file from the list of existing databases or to creating a new database exporting file.

The **Export Database** button performs the exporting operation.

Import Database Subnode
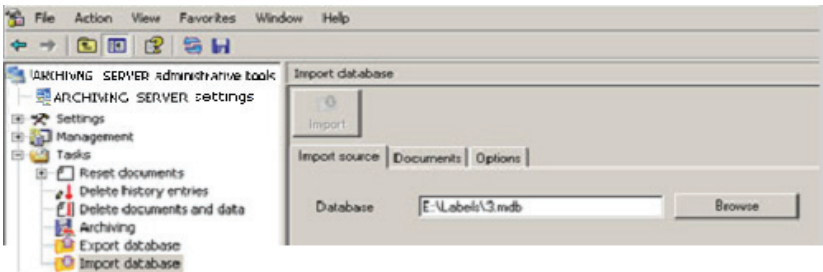
Figure 15 Import Database subnode in Tasks

To access the Import Database subnode:

Step 1 > Launch **the ARCHIVING Server Administration** from the Windows **Start** menu.

Step 2 > Select the **Tasks** node in the navigation tree.

Step 3 > Select the **Import Database** subnode in the **Tasks** node.

This node allows importing the existing database from a Microsoft Access file (.mdb file) to the **ARCHIVING**

Software database. Please note that the **Import** task works only with a database structure that is compatible with your **ARCHIVING Software** version.

The Import Database subnode contains three tabs:

Import source tab allows specifying the existing Access database file (.mdb file) in the **Database** text field or using the **Browse** button to browse the file system to select a file.

Documents tab allows selecting the desired documents for importing manually from the specified database by selecting check boxes.

Options tab allows specifying the target category in the **ARCHIVING** system database for import. Use the **Target root category** tree for this purpose.

Create sub folder check box allows importing the whole categories structure from the source Access database file (.mdb file) to the archiving database. If it is unchecked, no categories will be created and all documents will be written to the target root category.

Conflict resolution options allow setting the behavior of an import when encountering documents that have the same names and versions.

Stop import terminates the import task when a first document conflict is encountered.

Skip documents skips any duplicate conflicting document.

Overwrite target overwrites any target conflicting document.

Import Database button performs the importing operation.
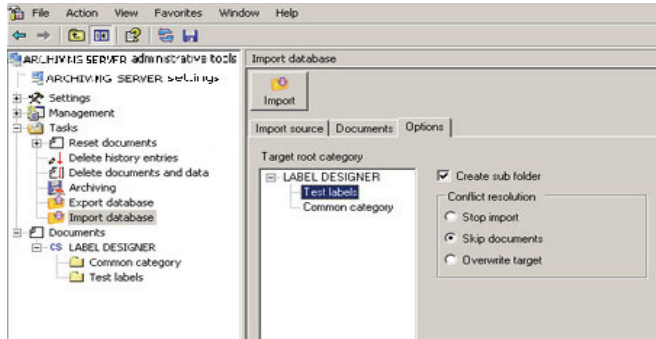
Figure 16 Import Database Options

Documents Node

Figure 17 Documents node

To access the Documents node:

Step 1 > Launch **the ARCHIVING Server Administration** from the Windows **Start** menu.

Step 2 > Select the **Documents** node in the navigation

tree.

This node allows changing document handling settings for **the ARCHIVING Software**.

This Documents node contains two tabs: **Category** and **Documents**.

Category

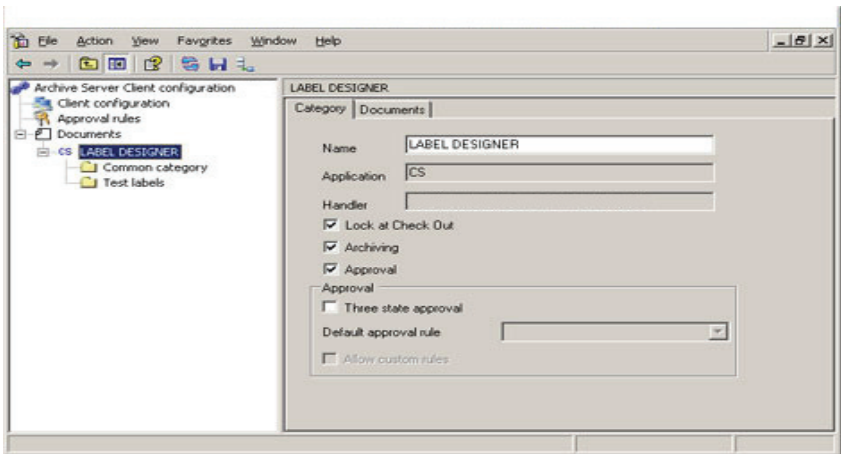• **Name**   The name of the currently selected category.

• **Application**   Shows the name of the Label Designer application in which the category was created. It has to be changed if a user wants to work with another Label Designer.

                           Handler

                           Shows the name of the technical class which can work with documents stored in the category.

• **Lock at check out**   When **On**, if a document is checked out by one user, other users can only do a reprint. When **Off**, other users can also open a document for print only.

• **Archiving**   When the archiving is switched **On**, the versioning is active for all documents. At check-in a document can no longer be overwritten and a new version needs to be created. When the archiving is switched **Off**, the document version number is not increased at check-in. New documents overwrite previous ones.

• **Approval**   If approval is **Off**, then only **Final** state can be assigned to documents. If approval is **On**, then at least two document states can be assigned: **Draft** and **Final**.

• **3-state Approval**   **3-state Approval** can only be activated if **Approval** is enabled. When it is **On**, the **In Approval** state can be chosen for documents, in addition to the **Draft** and **Final** states.

                           ▍Note

                           The following settings: Archiving, Approval, and 3-State Approval are defined both at category level in the ARCHIVING Client Administration, and at global level in

the ARCHIVING Server. To be activated for a given document, they need to be switched ON both at category level and at global level.

• **Default approval rule** Shows the approval rule selected by default for documents of this category.

• **Allow custom rules** When **On**, the user who submits a document for approval can choose a specific approval rule, different from the default one.

Documents This tab displays the list of documents. You can view document states, versions and other information in the grid.

C H A P T E R 5

ARCHIVING Client Administration

Logging In
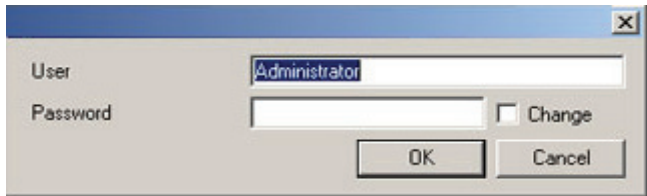
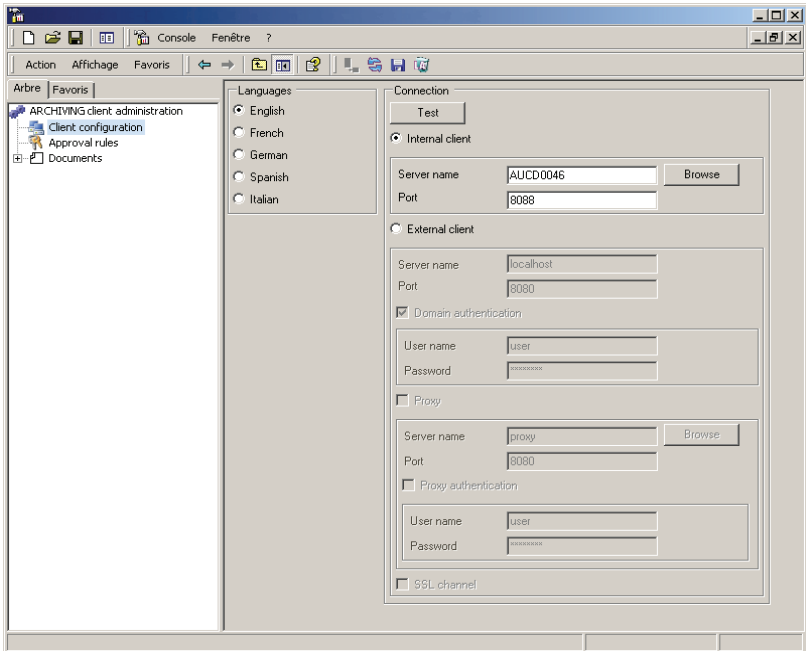**Figure 1** ARCHIVING Server Client Login

To launch **the ARCHIVING Client Administration**:

Step 1 > Launch **the ARCHIVING Client Administration** from the Windows **Start** menu.

Step 2 > Type a valid user name and password (i.e., defined in UMSS and having appropriate permissions).

The **Change** check box allows changing the password at any time.

Administration

Figure 2 ARCHIVING client administration

Upon successful login, the Administration window will appear.

This window allows changing different settings for the **ARCHIVING Client** module.

> **Note**
>
> **The settings for the server are accessible from the ARCHIVING Server Administration**.

General Layout   The layout of the **ARCHIVING Client** Administration window follows the **Microsoft Management Console (MMC)** standard.

Three buttons are added to the default set of MMC:

🖫 **Save:** Saves all changes made in the current window.

🔁 **Refresh:** Cancels all changes made in the current window and refreshes its state.

🖳 **Add additional item:** This is a content-dependent button which appears on **Approval rules** and **Documents** tree screens.

• **Navigation Tree**   In this tree console, the user can select all functions available in the Administration program.

Depending on the selected node in the navigation tree, the right-side work panes are updated.

• **Work Pane**   Depending on the selected node in the navigation tree, the work pane displays the associated settings.

• **Navigation**   Single functions are chosen by selecting a node in the navigation tree. When there is no functionality for a parent node, a page is shown to indicate that you must select a subnode.

Client Configuration Node

To access the Client Configuration node:

Step 1 > Launch **the ARCHIVING Client Administration** from the Windows **Start** menu.

Step 2 > Select the **Client Configuration** node in the navigation tree.

This node allows the client to set up the connection to the **ARCHIVING Server**. The user must select an **Internal client** or an **External client** connection.

• **Internal Client**   Specifies the settings for the internal client (this is a client that is located on the same network domain as the ARCHIVING Server). In this case, the TCP protocol is used.

  • **Server name** – specifies the name of the ARCHIVING Server.

  • **Browse button** – allows the user to search for the ARCHIVING Server in the internal network.

- **Port** – specifies the port of the ARCHIVING Server (8088 by default).

• **External Client**   Specifies the settings for the external client (this is a client that connects to the ARCHIVING Server via the Internet). In this case, the HTTP protocol is used and all content, which is transmitted between client and server, gets encrypted.

- **Server name** - specifies the name of the ARCHIVING Server.

- **Port** – specifies the port of the ARCHIVING Server (8080 by default).

- **Domain authentication** – If the ARCHIVING Server is installed on a network domain that requires authentication, authentication settings must be specified.

- **User Name** – specifies the user name to use for logging in to the network domain.

- **Password** – specifies the password.

• **Proxy**   The ARCHIVING Server Client may be installed on a PC, which is placed behind a proxy. In this case, the proxy settings should be set.

- **Server Name** – specifies the name of the proxy;

- **Browse button** - allows the user to search for a proxy on the internal network

- **Port** – specifies the proxy port;

- **Proxy authentication** – the proxy may require authentication. In this case, user credentials should be set:

- **User Name** – specifies the user name.

- **Password** – specifies the password.

• **SSL Channel**   If the ARCHIVING Server is installed behind a firewall which

only allows SSL access, this setting enables the client to connect to the ARCHIVING Server using SSL.

The **Test** button allows testing the connection to the **ARCHIVING Server**.

The **Languages** options allow you to specify the desired language for the user interface.
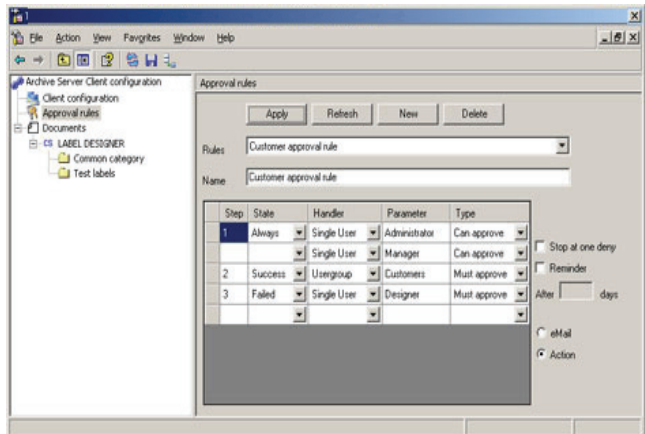
   Note

For a language change to be fully effective you need to close and re-open the application.

Approval Rules Node

To access the Approval Rules node:

Step 1 > Launch **the ARCHIVING Client Administration** from the Windows **Start** menu.

Step 2 > Select the **Approval Rules** node in the navigation tree.

Figure 3 Approval Rules node

This node allows creating custom approval rules, and specifying the number of steps, parameters, notification options, etc. You can see the currently available rules using the **Rules** drop-down list.

The Approval Rules node displays four buttons:

• **Apply**   Applies any changes made on this screen.

• **Refresh**   Displays the latest information from the database about the approval rules.

• **New**   Creates a new rule. You can specify a rule name in the **Name** text box.

• **Delete**   Deletes the selected rule.

The main grid in the middle of the Approval Rules work pane displays the steps that make up the currently selected rule. You can specify the following parameters for each approval step:

• **State**   Possible values: **Always**, **Failed**, **One of the steps failed**, **One of the steps succeeded**, **Success**.

   • **Always:** The current step will always be executed, no matter if the previous step failed or not.

   • **Failed:** The current step will be executed if the previous one failed.

   • **One of the steps failed:** The current step will be executed if one of the previous steps or substeps failed.

   • **One of the steps succeeded:** The current step will be executed if one of the previous steps or substeps succeeded.

   • **Success:** Works if the previous step or substep succeeded.

• **Handler**   Defines whether an action is required by a single user or by a user group in order to complete the current step. Possible values: **Single User**, **Usergroup**.

• **Parameter**   Specifies the user name or user group name according to the previous Handler field.

• **Type**   Defines the type of user participation in the approval workflow. Possible values are: **Can Approve**, **Must Approve**.

• **Stop at one deny**   Allows terminating the execution of the entire rule upon first deny of an approval workflow.

• **Reminder**   Allows setting an approval reminder to appear after the specified number of days.
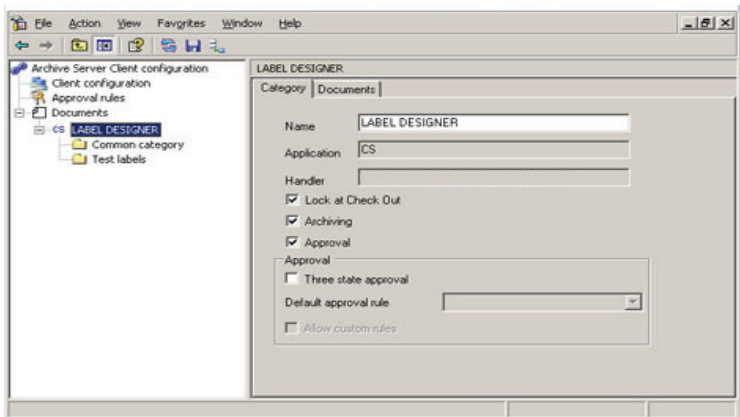
                         The **e-mail** and **Action** options define the type of approval notification — via e-mail message (single users only) or via an action table on the Label Designer startup.

Documents Node   To access the Documents node:

                         Step 1 > Launch **the ARCHIVING Client Administration** from the Windows **Start** menu.

                         Step 2 > Select the **Documents** node in the navigation tree.

Figure 4 Documents node

The Documents node contains two tabs: **Category** and **Documents**.

Category

This tab allows changing document handling settings for **the ARCHIVING Software**.

• **Name**

The name of the currently selected category.

• **Application**

Shows the name of the Label Designer application in which the category was created.

• **Handler**

Shows the name of the technical class which can work with documents stored in the category.

• **Lock at check out**

When **On**, if a document is checked out by one user, other users can only do a reprint. When **Off**, other users can also open a document for print only.

• **Archiving**

When the archiving is switched **On**, the versioning is active for all documents. At check-in a document can no longer be overwritten and a new version needs to be created. When the archiving is switched **Off**, the document version number is not increased at check-in. New documents overwrite previous ones.

• **Approval**

If approval is **Off**, then only **Final** state can be assigned to documents. If approval is **On**, then at least two document states can be assigned: **Draft** and **Final**.

• **3-state Approval**

3-state Approval can only be activated if **Approval** is enabled. When it is **On**, the **In Approval** state can be chosen for documents, in addition to the **Draft** and **Final** states.

Note

The following settings: Archiving, Approval, and 3-State Approval are defined both at category level in the ARCHIVING Client Administration, and at global level in the ARCHIVING Server. To be activated for a given document, they need to be switched ON both at category level and at global level.

• Default approval rule   Shows the approval rule selected by default for documents of this category.

• Allow custom rules   When **On**, the user who submits a document for approval can choose a specific approval rule, different from the default one.

Documents

This tab displays the list of documents. You can view documents states, versions and other information in the grid.