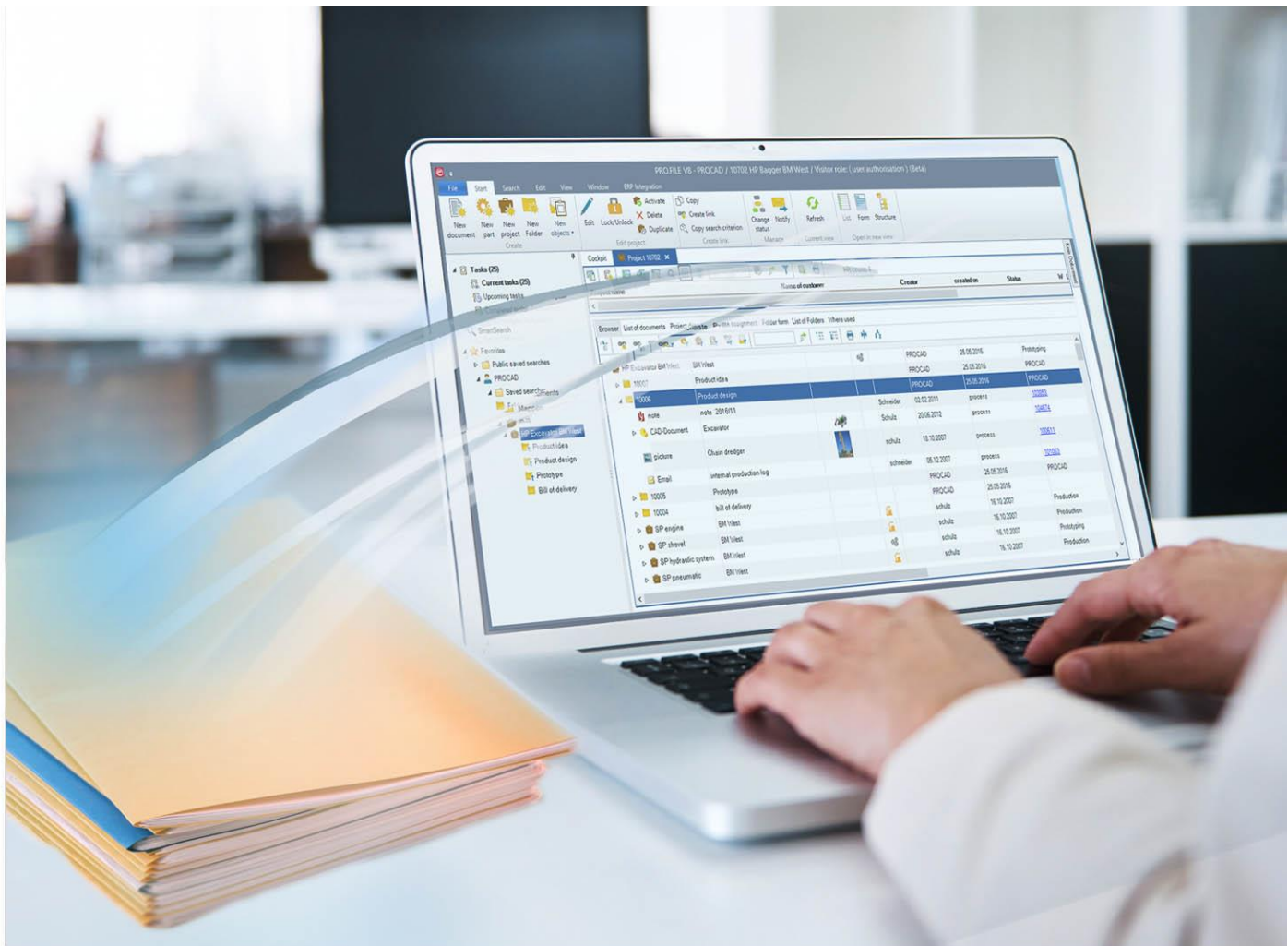


Operation PRO.FILE Optical Archiving

PRO.FILE Release 8.7
April 2017



Information contained in this publication may be changed or modified without notice, resulting in no obligation on the part of "PROCAD GmbH & Co. KG". The software described in this document is made available under license agreement. The software may only be used and copied under the terms described in the agreement.

The subject matter of the contract shall solely consist of the sold product with its properties and characteristics as well as the usage purpose according to the relevant product description. The user manual shall be considered as relevant source for the technical product description. Other or additional properties and/or characteristics or other usage purposes shall only be considered as agreed upon when expressly confirmed by us in writing.

The document is protected by copyright. All rights, also those including the translation, re-printing and copying of the documents or parts thereof are reserved.

No part of the documentation may be reproduced in any form (photocopy, microfilm or any other technique) or used for teaching purposes or processed, copied or distributed using any electronic form without the written permission of PROCAD GmbH & Co. KG.

Registered Trademarks:

PRO.FILE is a registered trademark of PROCAD GmbH & Co. KG

These and all other product and company names mentioned in this publication are subject to the protection of brands and trademarks and belong to their respective owners.

Responsible for Content:

PROCAD GmbH & Co. KG

Vincenz-Prießnitz-Straße 3 • 76131 Karlsruhe • info@procad.de • www.procad.de

Copyright • PROCAD GmbH & Co. KG • All rights reserved



Table of contents

Table of contents	3
About this manual.....	5
1 Optical archiving with PRO.FILE	6
1.1 Disclaimer:	6
2 The process of optical archiving.....	7
3 Part 1: Steps for the user	8
3.1 Step 1: Selection of documents to be archived	8
3.2 Step 2: Reservation of documents to be archived.....	9
3.3 Manage and change reservations.....	12
3.3.1 Delete reservation	12
3.3.2 Re-organize lists	13
4 Excursion: Drawers for reserved documents	14
4.1 Display of drawer lists	14
4.2 Depositing in drawer lists and occurrence of errors.....	15
4.2.1 No duplicate documents in the drawer lists.....	15
5 Part 2: Steps for the administrator	16
5.1 Burn files to CD via transit directory	16
5.1.1 Prepare CD	17
5.1.2 Writing of the actual CD at the CD writer (PC with Windows).....	18
5.1.3 Reset transit status	19
5.1.4 Integration of the CD into the PRO.FILE administration or resetting the transit status	19
5.1.5 Delete transit status.....	20
5.2 Take, log on and pick CD drives	21
5.2.1 Take CD	21
5.2.2 Log-on CD	21
5.2.3 Pick CD.....	21
5.3 Settings and functions for the structure node "CD"	22
5.3.1 The CD list	22
5.3.2 Information.....	23
5.3.3 Unlock.....	23

5.3.4 Delete 23

5.3.5 Delete files 23

5.3.6 Test deleting files 23

6 Procedure and transfer charts for the archiving 24

6.1 CD Preparation 25

6.2 CD Writing 26

6.3 Take CD 27

6.4 CD status of a document 28

6.5 Statuses of CDs (in CD list) 28

7 Index 29

About this manual

Step-by-step instructions:

This PRO.FILE manual uses various signs and icons in order to guarantee a good readability and comfortable handling.

For quicker finding within the manual, step-by-step instructions are marked with a margin heading.

Menu sequences and function calls

Menu sequences and function calls explained in this manual are marked in bold and in quotation marks.

Example:

"File" => "New" => "Document description"

Buttons and keys

Keys and buttons are highlighted by angle brackets.

Example:

"Confirm with <OK>."

Notes and warnings

To highlight special information the following icons are used:



Function call:

"PRO.FILE" => "Extras" => "Options" => "Performance"



Example:

Boxes marked with this icon give subject-relevant examples for the usage of command lines, configuration strings and other software-relevant entries.



Note:

Boxes marked with this icon contain useful hints on the operation, configuration or installation of the PRO.FILE software.



Attention:

All information given in these boxes is very important and should be read carefully! Non-observance of these hints may lead to wrong functioning, display problems or other negative consequences.



Important notes:

The "stop sign" warns you of possible entry or operation errors, which may lead to loss of data!



Attention – Undo not possible:

All entries and configurations described in these boxes have to be made carefully, because they cannot be undone!

1

Optical archiving with PRO.FILE

The constantly increasing amount of data and documents, new regulations on product liability and the pressure to comply with the norms of ISO 9000 require active measures from companies.

PROCAD provides a flexible concept for the archiving of technical documents based on the PLM system PRO.FILE. With appropriate scanners, technical drawings up to the size A0 and other technical documents on paper or microfilm can be transferred into normed electronic formats, restored and classified and managed with a relational database.

For the long-term storage of large amounts of scanned documents and CAD documents, optical storage media can be used. The use of standard CD-ROM as media, CD recorders for writing to the CD-ROM and Multi-CD-ROM drives for making the data on the CD-ROM available guarantee a high amount of security, speed and flexibility in company documentation.

The use of CD-ROM as storage media allows companies to store their data centrally but to still make them available in a flexible way.

1.1

Disclaimer:

The processes described in this manual may need to be customised according to individual customer requirements. The scope of data backup described in this documentation may not be sufficient for certain customer-specific installations to recover all necessary data.

The company PROCAD GmbH & Co. KG accepts no responsibility for the correct functionality of the described processes, or the completeness of the scope of backup recommended in this documentation.

PROCAD GmbH & Co. KG also accepts no responsibility for possible loss of data resulting from the use of this documentation.

**Attention:**

Please note our terms and conditions relating to the subject of data backup:

... The customer shall, as a material contractual duty, make backups of data and programs in machine-readable form at intervals commensurate with the application, though at least once per day, so as to ensure that such data and programs can be restored with only reasonable effort and expense. ...

2

The process of optical archiving

The aim of optical archiving is to select files saved in PRO.FILE and to prepare them for writing onto a CD.

**Note: Only "documents" can be archived optically**

In PRO.FILE files are exclusively administered via the object type "document". Therefore all following instructions relate to the PRO.FILE object type "document".

Proceed as follows:

- As a PRO.FILE user you can use the tab "**Archival processing**" to access the functions for optical archiving.
1. Start the search for the documents to be archived, via the search functions in PRO.FILE. You can then select the documents to be archived in the list.
 2. Memorize the selected documents via the command "**Reserve for archival**" from the tab "**Archival processing**".
- ⇒ Further information on step 1 and 2 can be found in the following chapter "[Part 1: Steps for the user](#)".
- ⇒ All other steps for the optical archiving are taken by the administrator:
3. In the third step the administrator in the PRO.FILE Management Console can prepare the CD to be written in an auxiliary directory on the data disk. This directory is then externally transferred to a CD via a CD writer.
 4. The final fourth step depends on the further usage of the CD:
 - Either the archive CD is only used as a copy and the original documents remain on the PRO.FILE file server – in this case the archived documents are then unlocked again.
 - Or PRO.FILE is to access these documents exclusively from the CD – in this case the CAD has to be "taken over" into PRO.FILE. This step is final: from this moment on, the documents can only be accessed via the CD (and are thus write-protected). This step is made in the PRO.FILE Management Console and can only be taken by users with administrator rights.
- ⇒ The "writing" and "taking over" of a CD as task for the administrator is described in the chapter "[Part 2: Steps for the administrator](#)".

**Attention: Configuration settings have to be up to date**

Please note that the optical archiving of documents can only work if all configuration settings on your computer are up to date. For details please see the manual "Administration PRO.FILE Optical Archiving".

3 Part 1: Steps for the user

For the preparation of the optical archiving, the following steps can be carried out by the user via the tabs in PRO.FILE:

- [Step 1: Selection of documents to be archived](#)
- [Step 2: Reservation of documents to be archived](#)

For the management of reserved data records please see chapter:

- [Manage and change reservations](#)

3.1 Step 1: Selection of documents to be archived

Documents are independent objects in PRO.FILE and can be selected and displayed as such.

Proceed as follows:

In order to search for the documents to be archived, you can use the search functions of PRO.FILE which can be found in the tab "Search" in the ribbon.

1. Start, e.g. with "Search" => "Documents".
If several documents are to be archived, the list view is recommended, since you can easily select several documents at once in the list.
2. Enter your search criteria into the document form and start the search with <Search>.

⇒ The search results are now displayed in list form. The documents to be archived can now be selected.

Doc. No.	Document type	Ve	Thumbnail	Creation date	Creator	Mod. date	Modifier
10012	Report			17/04/2008	procad		
10011	Report			16/04/2008	procad		
10010	Report			15/04/2008	procad		
10009	Offer			14/04/2008	procad		
10008	Offer			27/06/2003	procad	27/06/2003	procad
10006	Offer			25/07/2002	Editor	18/06/2003	procad
10005	Grid image			22/11/2001	Editor		
10004	Report			22/11/2001	Editor	18/06/2003	procad
10002	PROCAD-CAD			22/11/2001	Editor	18/06/2003	procad
10001	Report			22/11/2001	Editor		
10000	Offer			22/11/2001	Editor		

3. Proceed now to [Step 2: Reservation of documents to be archived](#).



Note:

Detailed information on the selection of documents can be found in the manual "Operation PRO.FILE for Beginners".

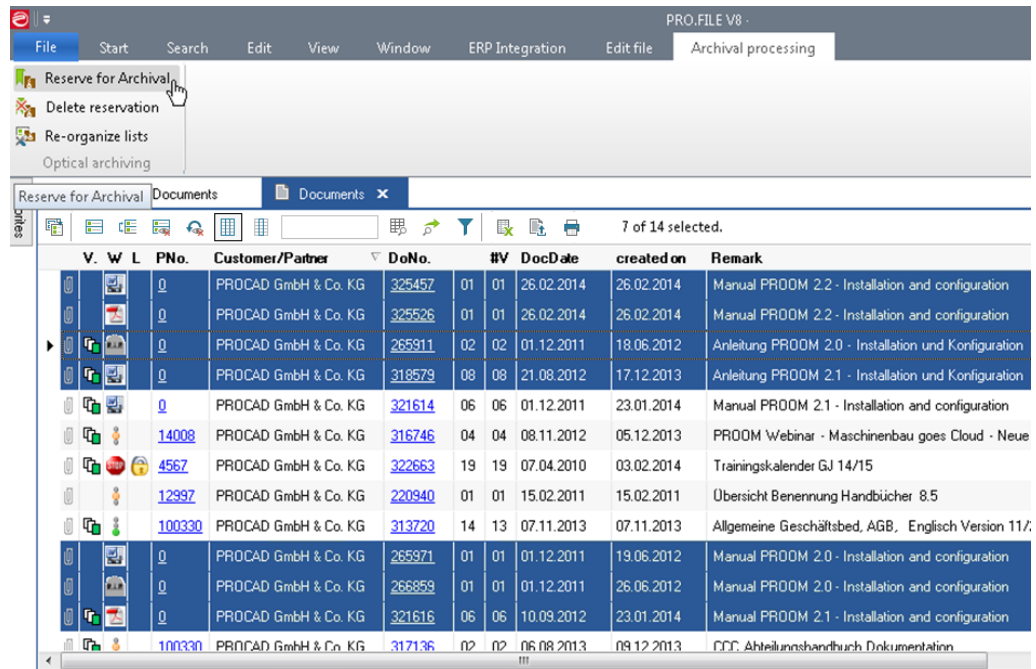
3.2

Step 2: Reservation of documents to be archived

Once you have the document list before you, you can start directly with the archiving.

Proceed as follows:

1. Via "[Step 1: Selection of documents to be archived](#)" the documents to be archived are identified and selected.
2. You can reserve the listed documents for archiving by following the function "Reserve for archival" from the tab "Archival processing".



The screenshot shows the PRO.FILE V8 software interface. The 'Archival processing' tab is active, displaying a menu with 'Reserve for Archival', 'Delete reservation', and 'Re-organize lists'. Below the menu, a table lists documents for archiving. The table has columns: V, W, L, PNo., Customer/Partner, DoNo., #V, DocDate, created on, and Remark. 7 of 14 documents are selected.

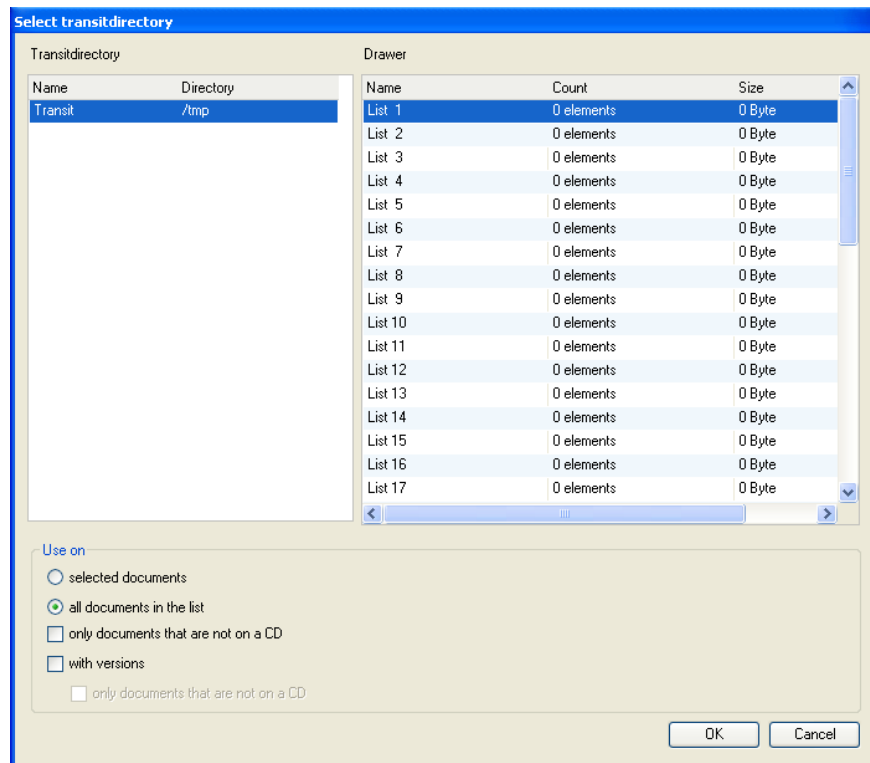
V	W	L	PNo.	Customer/Partner	DoNo.	#V	DocDate	created on	Remark
			0	PROCAD GmbH & Co. KG	325457	01	26.02.2014	26.02.2014	Manual PROOM 2.2 - Installation and configuration
			0	PROCAD GmbH & Co. KG	325526	01	26.02.2014	26.02.2014	Manual PROOM 2.2 - Installation and configuration
			0	PROCAD GmbH & Co. KG	265911	02	01.12.2011	18.06.2012	Anleitung PROOM 2.0 - Installation und Konfiguration
			0	PROCAD GmbH & Co. KG	318579	08	21.08.2012	17.12.2013	Anleitung PROOM 2.1 - Installation und Konfiguration
			0	PROCAD GmbH & Co. KG	321614	06	01.12.2011	23.01.2014	Manual PROOM 2.1 - Installation and configuration
			14008	PROCAD GmbH & Co. KG	316746	04	08.11.2012	05.12.2013	PROOM Webinar - Maschinenbau goes Cloud - Neue
			4567	PROCAD GmbH & Co. KG	322663	19	07.04.2010	03.02.2014	Trainingskalender GJ 14/15
			12397	PROCAD GmbH & Co. KG	220940	01	15.02.2011	15.02.2011	Übersicht Benennung Handbücher 8.5
			100330	PROCAD GmbH & Co. KG	313720	14	07.11.2013	07.11.2013	Allgemeine Geschäftsbed. AGB, Englisch Version 11/
			0	PROCAD GmbH & Co. KG	265971	01	01.12.2011	19.06.2012	Manual PROOM 2.0 - Installation and configuration
			0	PROCAD GmbH & Co. KG	266859	01	01.12.2011	26.06.2012	Manual PROOM 2.0 - Installation and configuration
			0	PROCAD GmbH & Co. KG	321616	06	10.09.2012	23.01.2014	Manual PROOM 2.1 - Installation and configuration
			100330	PROCAD GmbH & Co. KG	317136	02	06.08.2013	09.12.2013	CCC-Abteilungshandbuch Dokumentation



Note: Management of archival list

Information on the additional sub-menu entries "[Delete reservation](#)" and "[Re-organize lists](#)" can be found in the following chapters.

3. Once you have narrowed down the list of documents to be archived you can create a so-called transit directory with the function **"Reserve for archival"** in which the selected documents are noted. A transit directory can temporarily save up to 20 lists. Of course, you can create several transit directories.



4. Select the list number of the drawer in which you would like to put the documents to be archived.



Note: Information on "drawers"

Detailed information can be found in the following chapter ["Excursion: Drawers for reserved documents"](#).

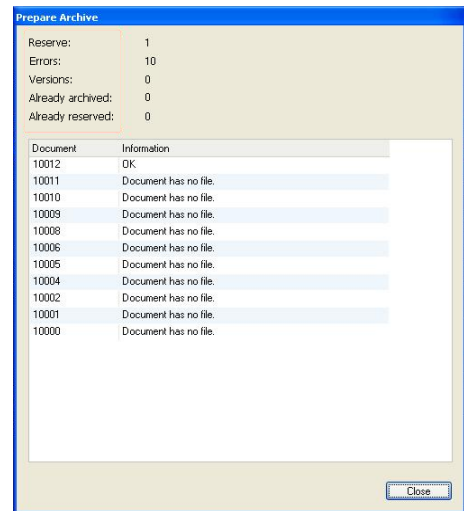
5. Furthermore, you can apply the following options to the pre-selected documents via this function:
- **"selected documents":**
All documents selected in the active list are reserved for archival.
 - **"all documents in the list":**
All documents in the active list are reserved for archival. The previously made selection is thus ignored.

- "only documents that are not on a CD":

With this option, all documents from the list that were not yet written to a CD-ROM will be taken over into the archival list. PRO.FILE checks the list for documents that are already on a CD-ROM.

After confirmation of your selection, a list is produced in which the successfully reserved are listed as well as those that produced errors and therefore are unsuited for archiving.

The number of found versions is displayed in the message box as well as the number of documents and versions on CD-ROM.

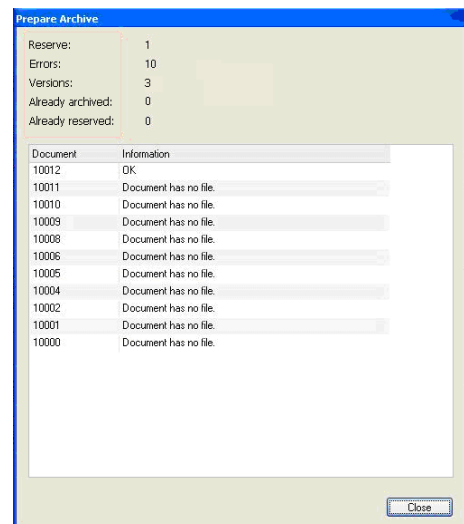


- "with versions":

With this option the listed documents are transferred to the archival list with all versions. You then have the options to select "only documents that are not on a CD". If you do not select this last option, all documents are transferred to the archival list, even if versions of these documents are already on a CD-ROM.

The number of found versions is displayed in a new dialogue. The number of documents edited relates to the documents displayed in the list.

Again, a message box informs you about the number of elements reserved for archiving, as well as about the number of documents that produced errors. The numbers of versions and of documents already archived or reserved are also displayed.



6. Confirm the reservation for archival with <OK> and the appearing message boxes with <Close>. The selected documents are now available for archival.

3.3 Manage and change reservations

After documents have been transferred to the archival list via the PRO.FILE function "Archival processing" => "Reserve for archival", it is possible to manage the reservations via the following functions:

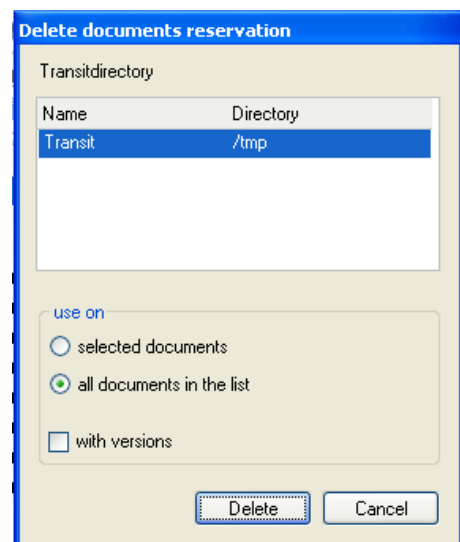
- [Delete reservation](#)
- [Re-organize lists](#)

For detailed information see the following sub-chapters.

3.3.1 Delete reservation

1. If you want to remove documents that you have already reserved for archiving from the selection, you can use the function "Delete reservation" for the corresponding document list.
2. Furthermore, you can use the following options:
 - "selected documents"
 - "all documents"
 - "with versions"

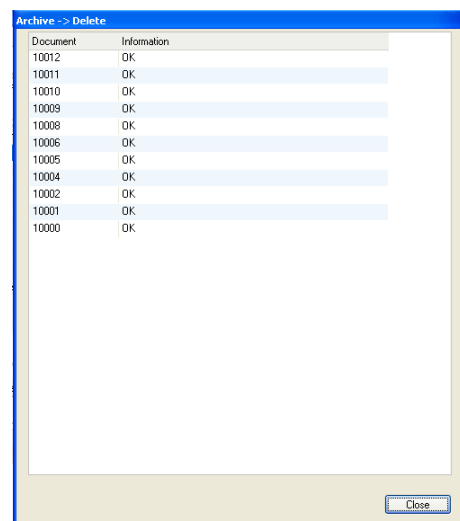
⇒ Depending on your selection, the documents contained in the document list are removed from the transit directory. This is done regardless of the drawer in which the documents were found; even documents that were in the error drawer are removed.



⇒ The number of documents that were in the document list is displayed in a message box. Versions belonging to these documents are not taken into consideration. If they had been selected for archiving, they will be removed from the list with this function.

3. Confirm your selection with <Close>.

⇒ Your reservation has now been cancelled.



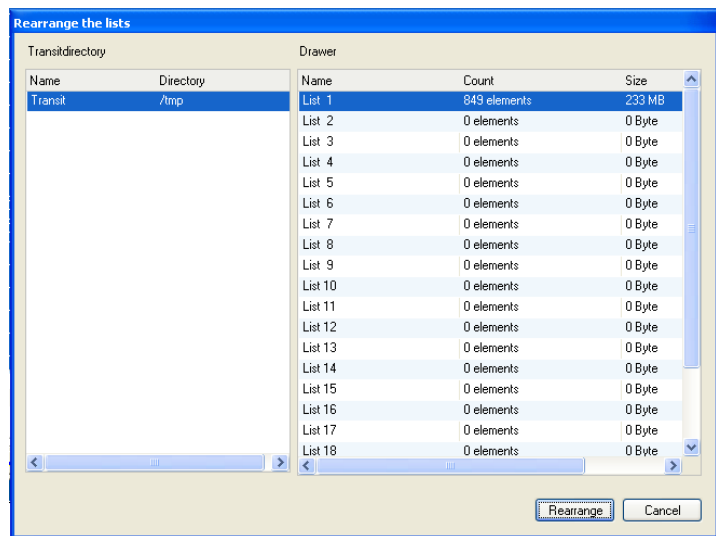
3.3.2

Re-organize lists

If during the reservation not all lists have been used and therefore empty lists are contained in the list selection, you can reorganize them.

1. To do so, use the function "Re-organize lists" from the tab "Archival processing".

⇒ If you click on the button **<Rearrange>**, the used lists are consecutively numbered.



4 Excursion: Drawers for reserved documents

A CD-ROM offers space for large numbers of files. The list of all documents to be written on a CD-ROM could therefore become quite long. In order to process this list in smaller sections, PRO.FILE allows the user to differentiate between several lists, so-called "drawers". The drawers with their lists can be found in the individual transit directories. The lists are consecutively numbered from 1 to 20.

When reserving documents, the user can select the list from the drawer in which the documents are to be stored until writing to the CD-ROM.

4.1 Display of drawer lists

Via the function "Archival list" from the tab "Search" in PRO.FILE, you can reach the display of the drawers with their lists.

The mask for the drawer looks as follows:

Only in this view the entire list and the error list can be viewed. This is done by double-clicking on the entries.

The view of the entire list contains the whole sum of all elements reserved for archiving and their disk usage.

The last line in the drawer is called "error list".

Transitdirectory		Drawer		
Name	Directory	Name	Count	Size
Transit	/tmp	All	1 elements	14 KB
		List 1	1 elements	14 KB
		List 2	0 elements	0 Byte
		List 3	0 elements	0 Byte
		List 4	0 elements	0 Byte
		List 5	0 elements	0 Byte
		List 6	0 elements	0 Byte
		List 7	0 elements	0 Byte
		List 8	0 elements	0 Byte
		List 9	0 elements	0 Byte
		List 10	0 elements	0 Byte
		List 11	0 elements	0 Byte
		List 12	0 elements	0 Byte
		List 13	0 elements	0 Byte
		List 14	0 elements	0 Byte
		List 15	0 elements	0 Byte
		List 16	0 elements	0 Byte
		List 17	0 elements	0 Byte
		List 18	0 elements	0 Byte
		List 19	0 elements	0 Byte
		List 20	0 elements	0 Byte
		Errors	12 Elements	

In this drawer "error list", all documents that returned errors during the previous steps for archiving are collected – in most cases due to the fact that the corresponding file could not be found. These files are not taken into consideration for the whole sum.

By clicking on <Accept> you reach the document list.



Note:

If the list "All" is selected, all documents currently reserved for archiving are displayed in the following document list, i.e. all documents in all drawers.

4.2

Depositing in drawer lists and occurrence of errors

When reserving documents, the user first selects the "organisational drawer", in which the documents are to be deposited. The choice of drawers is only relevant for large amounts of data. Upon archiving, the drawers are emptied consecutively (starting with list 0). The drawers with lower numbers are emptied first. Drawers with higher numbers may have to be written to an additional CD-ROM.

The most common reason, why a document returns an error upon reserving is that the file cannot be found or accessed (access rights!).

Files of the length zero are also treated as errors by PRO.FILE. Technically, they can be archived as well, but it is considered sensible to inform the user of this fact.



Attention:

Documents in the error drawer are not taken into consideration for archiving. Before starting the actual archiving, you should therefore make sure that the error drawer is empty (you can view the documents in the error drawer with "Search" => "Archival list" and then by selecting the corresponding menu entry). Please refer to the chapter "[Delete reservation](#)" for information on how to empty the error drawer.

4.2.1

No duplicate documents in the drawer lists

Each document may only occur on one list. It is not possible to put the same document into two different lists in the same drawer.

For instance, if you select the list of documents from "List 1" in the drawer and you reserve these documents for archiving in "List 2", PRO.FILE will remove the document from "List 1". As a consequence, the total number of documents to be archived is not changed.



Note:

Due to obvious reasons it is not possible to deposit reserved documents directly in the error list.

5

Part 2: Steps for the administrator

System-
administrative
settings

Further settings and steps for the archiving are made in the PRO.FILE Management Console. You will find three sub-nodes relevant for archiving under the node "Archiving":

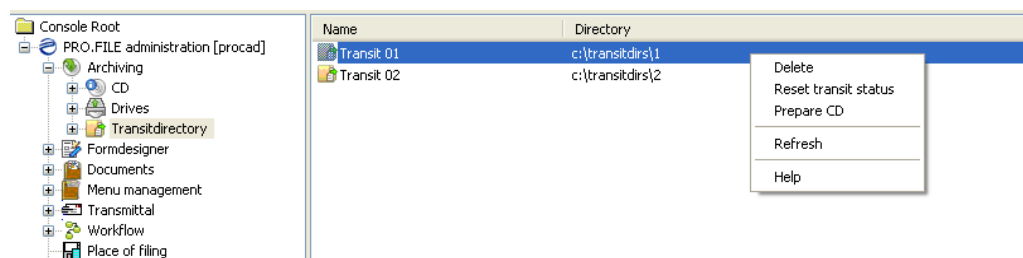
The functions in these nodes are described in the following sub-chapters.

- [Burn files to CD via transit directory](#)
- [Take, log on and pick CD drives](#)
- [Settings and functions for the structure node "CD"](#)

5.1

Burn files to CD via transit directory

The next step after reserving the files to be archived in the PRO.FILE Windows Client is the compilation of the data for the CD. This image will be created in a separate directory on the local hard drive, the so-called "image directory" or "transit directory" since the data are only temporarily stored in this folder.



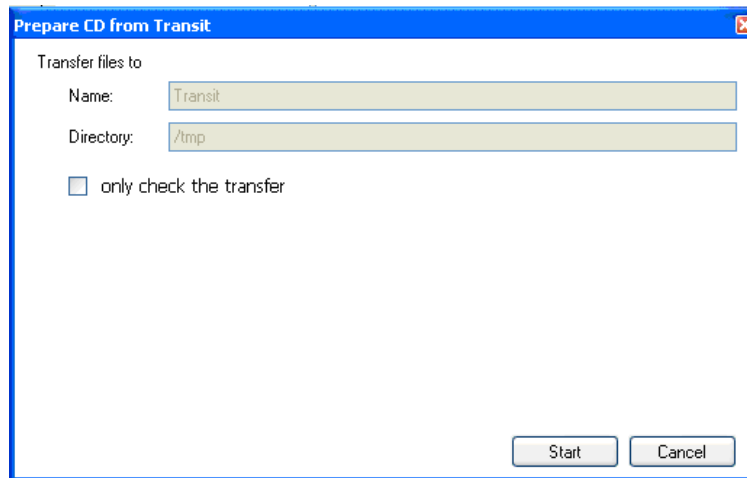
The following functions are available:

- [Prepare CD](#)
- [Writing of the actual CD at the CD writer \(PC with Windows\)](#)
- [Reset transit status](#)
- [Integration of the CD into the PRO.FILE administration or resetting the transit status](#)
- [Delete transit status](#)

5.1.1

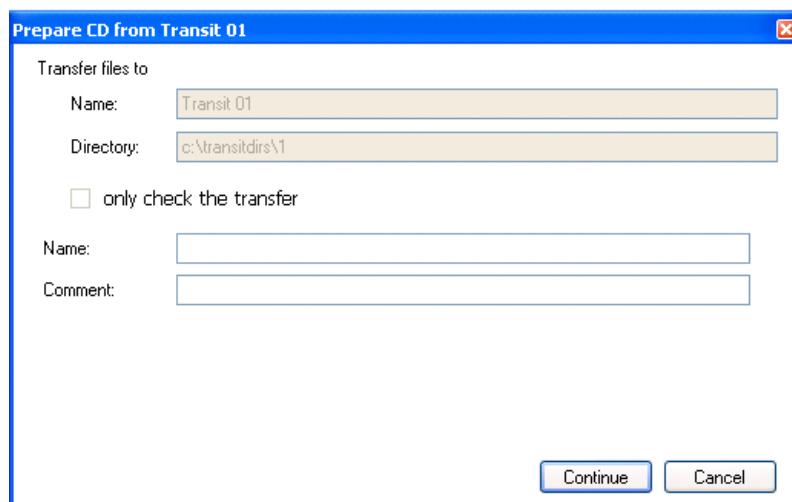
Prepare CD

With the menu function "prepare CD" the copying is started.



You can either select to **"only check the transfer"** or to **start the transfer directly**. This is a check procedure for the CD preparation, which can be used to detect errors. The difference is that after the check, the files are not removed from the lists in which they are contained and remain in the reservation status. After the real transfer, the reservation is cancelled.

In the next step, the name of the CD to be created and a describing comment are queried. Further information, such as the PRO.FILE user, the creation date, the number of files, etc. are retrieved by the system automatically.



The name of the CD is used later in the administration to identify the CD (under the node "CD" in the Management Console). It should therefore be unique and meaningful and not too long. For comments, a additional field is available.

In a first pass, PRO.FILE now browses through all lists in the drawer (except for the error list) and calculates the disk space required.

If the amount required exceeds the space available on a CD-ROM, a corresponding message is displayed with the option to cancel the archiving or – which is more useful in most cases – to pause the archiving, i.e. to fill the CD. In the latter case the documents that do not fit on the CD remain on their lists as reserved for archiving and can be written onto the next CD.

Once it is determined, which documents fit on the CD, PRO.FILE processes the list of documents to be archived and copies them to the transit directory. The corresponding documents are marked as "in transit on CD" and cannot be changed until the archiving is completed.

The transit directory is an image of the CD to be written. Several sub-directories are created for the documents in order to avoid problems caused by too many files in one directory. At the highest level in the transit directory some files are created which help to describe the CD. These files will be placed in the root directory of the CD.

These
administrative
files are:

- The list of documents to be archived
- A log file, which contains descriptions of errors that may have occurred during copying.
- An information file, which contains the name of the CD to be written, the user who created it, the creation date, comments entered by the user, the number of files contained and the number of errors that may have occurred during copying.
- A detailed list of contents with detailed information on each document, e.g. the original location in PRO.FILE, the size, creator, creation date, modifier, modification date, number of part masters assigned, etc.
- A file with information from the part masters belonging to the document
- An allocation file specifying for each document, which part master belongs to it (if applicable)

At the end of this step, a list is displayed indicating whether errors have occurred during copies and if so, the number of errors.

5.1.2

Writing of the actual CD at the CD writer (PC with Windows)

Once the preparations have been completed successfully, the transit directory can be written onto a CD. This step is carried out at a computer suited for this procedure and is not subject to the control of PRO.FILE. For the writing process, you can use any CD writing software that is capable of writing the transit directory in ISO 9660 format onto the CD. Once all desired copies of the CD have been produced, you can delete the image file from the file manager in order to make space for the next archive image.

**Note:**

For security reasons you should produce several identical copies of the CD (for example one for usage, one as backup copy within the company, one for external storage in a safe, etc.)

5.1.3

Reset transit status

This function is used if a written CD is not to be integrated into PRO.FILE. Since the documents on this CD are still in the transitory status "**in transit on CD**", they are still locked for further editing.

With the function "**Reset transit status**", this lock is removed and the documents are set back to their regular status ("**on the disk**"). Once this step has been carried out, the integration of the CD into PRO.FILE is no longer possible.

The CD itself is not required for resetting the transit status. All documents that are in the status "**in transit**" are reset. For this reason, this function should be used directly after writing the CD (if the CD is not to be integrated into PRO.FILE and only in this case).

5.1.4

Integration of the CD into the PRO.FILE administration or resetting the transit status

If the CD has been written successfully, you can choose between two alternatives, depending on the planned use of the CD:

- **CD as copy without PRO.FILE relation:**

If the CD is to leave the house or to remain in the safe as backup copy, select the function "**Reset transit status**" from the context menu. The 'transit lock' is then removed and the documents can be edited and deleted again. In this case, PRO.FILE does not 'recognize' the CD and it cannot be integrated into the PRO.FILE administration at a later point in time.

- **CD as mass storage integrated into PRO.FILE:**

If the documents contained on the CD are to be used in PRO.FILE (so that copies on the hard disk can be deleted and PRO.FILE accesses the data directly from the CD), a different procedure is required. In this case, the CD has to be inserted into an accessible CD-ROM drive.

**Attention:**

Before an active CD can be removed from a drive, PRO.FILE has to be informed of this.

1. Then select the function "**Take CD**" from the context menu.
 - ⇒ You will be prompted to select the drive that contains the new CD (PRO.FILE detects from this selection the directory, in which the CD contents will be visible, i.e. mounted, for the computer).
 - ⇒ If a PRO.FILE CD is detected, PRO.FILE retrieves all other information from the description data on the CD. This information is displayed for your control. If errors occurred during the creation of the CD (this is then noted on the CD), an addition warning is displayed.
 - ⇒ **CDs with errors should not be integrated/taken!**
 - ⇒ PRO.FILE then creates a new entry in the CD list. It keeps track of all CDs that have ever been taken, information on the creator (who, when, comments), where they can be accessed (mount directory), whether they are currently in the system and in which status.
 - ⇒ Apart from the status "0: Not available" and "2: Available", there is also the status "1: In transit". The new CD is at first set to "1: In transit", so that no one can try to access it during the integration.
 - ⇒ Then, all documents listed in the CD contents file are processed. For each document, an entry is made in the database, saying that the document is now on CD, on which CD and where (directory). Once this has been done, the document is locked as "on CD". It can be viewed, but it can no longer be modified.
 - ⇒ Finally, the CD is marked as "available in the system" and the CD list is updated – the new CD appears on the list.
 - ⇒ The documents can now be accessed via the regular document functionality.

5.1.5

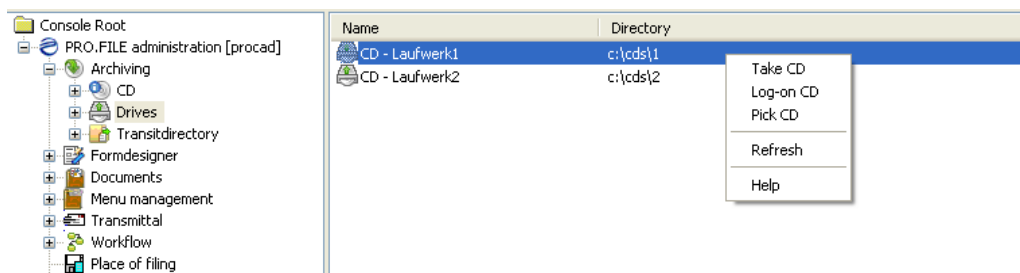
Delete transit status

Before the compilation of a new CD, the transit directory has to be emptied by using the function "**Delete**".

With the function "**Delete**", the auxiliary directory, into which documents are copied for writing on the CD-ROM, is deleted. This should be done before a new CD is prepared.

The actual location of the transit directory can be configured in the file ARCHIVE.CFG (see manual "Administration PRO.FILE Optical Archiving").

5.2 Take, log on and pick CD drives



Under this node, a list of CD drives known in PRO.FILE is displayed. The following functions are available

- ["Take CD"](#)
- ["Log-on CD"](#)
- ["Pick CD"](#)

5.2.1 Take CD

With the function **"Take CD"**, a written CD is integrated into the PRO.FILE administration. This step is final. After that, the documents are to be found on the CD for PRO.FILE and no longer on the hard disk. In a next, optional step, the original files on the PRO.FILE file server can be deleted, since these have been transferred to the CD.

5.2.2 Log-on CD

In order for the status of the CDs known to the database matches the actual status, it is important that PRO.FILE is informed about the taking and removing (picking) of CDs. The recognition of drives for PRO.FILE and their location is configured by user-specific entries in the file "ARCHIVE.CFG".

"Log-on CD" informs PRO.FILE of the fact that a CD has been inserted in an empty drive. PRO.FILE offers a selection of (known) free drives. Select the drive into which the CD has been inserted. For you to be sure, PRO.FILE once again displays the information regarding the CD in the selected drive. After that, the CD is marked as **"in the system"** (status 2) and documents that are contained on this CD can be accessed.

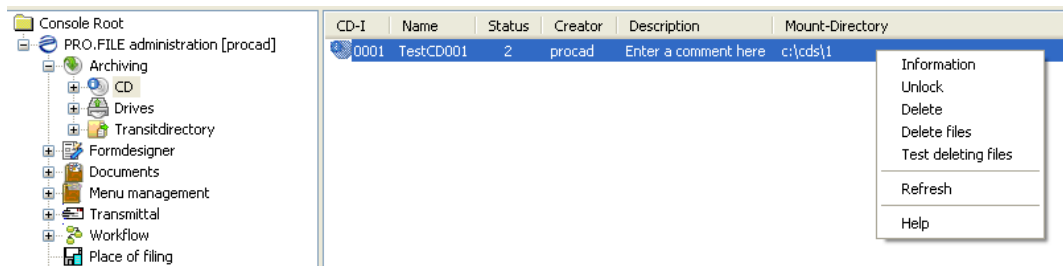
5.2.3 Pick CD

As for the inserting (taking) of a CD, PRO.FILE has to be informed about the removal (picking) of a CD. You can only pick CDs that were inserted (taken) correctly and that are still in the drive.

Upon selection of the menu entry **"Drives" => "Pick CD"**, PRO.FILE displays a selection of drives containing (known) CDS. For you to be sure, information on the inserted CD is once again displayed.

5.3

Settings and functions for the structure node "CD"



Under this node of the Management Console you can find a list of all CDs known in PRO.FILE, i.e. all CDs that have been loaded in PRO.FILE after writing.

**Attention:**

The functions offered for the CD list should be reserved for one single user, the archival administrator, and should be used in PRO.FILE standalone on the server computer.

**Note:**

The archival computer may be a different one than the file server. This is to be taken into consideration for archiving – further information can be found in the section "Table FSX".

5.3.1

The CD list

You can configure the view of the CD list in the PRO.FILE Management Console via a right click on "CD" => "View" => "Add/Remove columns". The configuration is made according to list formats. Further information can be found in the PRO.FILE configuration manual.

The following fields are available in the CD list:

"CD-ID"	Consecutive number of the CD
"Name"	Name chosen by archiving user
"Status"	Current status of the CD according to the following key: 0: CD is known, but not in the system 1: Special status – CD is being added 2: CD is known and is in a drive (mount directory is valid)
"Creator"	Name of the user who created the CD (preparation)
"Description"	Comment entered during preparation

"Mount directory"	Full path under which the server computer can reach the CD (if in the system)
"Date of creation"	Creation date of the CD
"Lock"	Access locked/unlocked

5.3.2 Information

To obtain information on the CD, select it with the mouse and right-click on it to reach the context menu. The menu entry **"Information"** displays all relevant information about a CD in the system. This CD must therefore have the status **"2:available"**.

5.3.3 Unlock

This function releases a locked CD. This is usually done automatically, and only has to be done manually if a CD remains locked after a power failure, system crash or similar occurrences.

5.3.4 Delete

This function deletes the administrative entry of a CD. This is only possible if no more references from PRO.FILE exist for this CD, i.e. if no more documents are marked as located on this CD.

5.3.5 Delete files

This function deletes the original files on the hard disk and should – in case you decide to use this function – be used directly after the integration of the corresponding CD into PRO.FILE. Upon selection of this function, the CD, the original files of which are to be deleted, must be selected and available in the system. Before deleting the original files, PRO.FILE checks for each file, whether the file size on the CD, on the hard disk and in the administration file on the CD match. Only if this check is successful, the deletion is started. If any errors occur, they are logged in the file "ARCHIVE.LOG" in the transit directory and the number of errors is reported at the end of the deletion procedure.



Attention:

Errors during the integration of a CD should always be remedied before the original files are deleted!

5.3.6 Test deleting files

This function performs a test run "delete", but does not in fact delete the files. All tests made for deletion are logged in the file "ARCHIVE.LOG" in the transit directory. This function can therefore be used to check, whether deletion will return any errors.

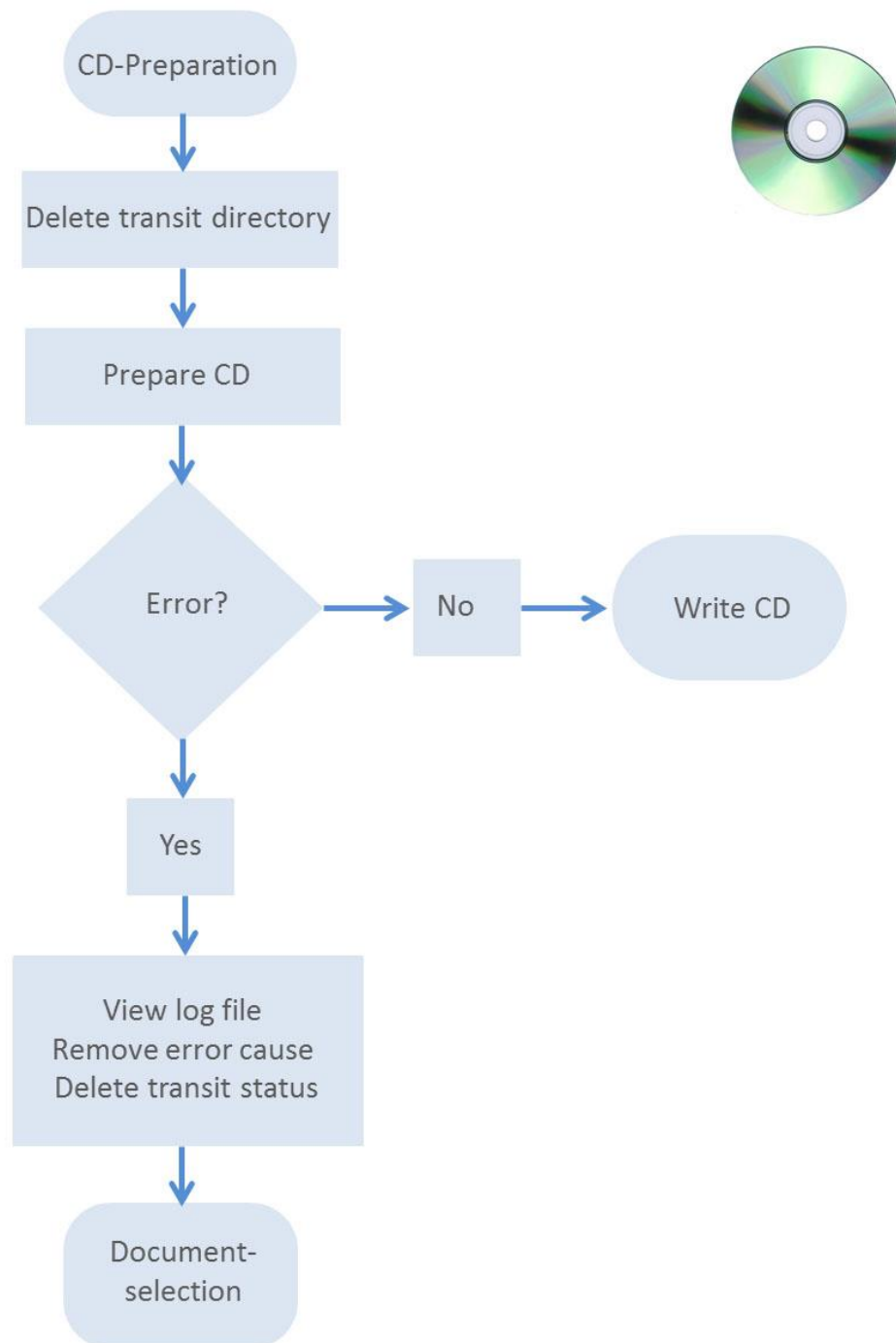
6 Procedure and transfer charts for the archiving

The charts in the following sub-chapter depict various procedures and transitions during the archival procedure for the sake of an overview.

The following charts are presented:

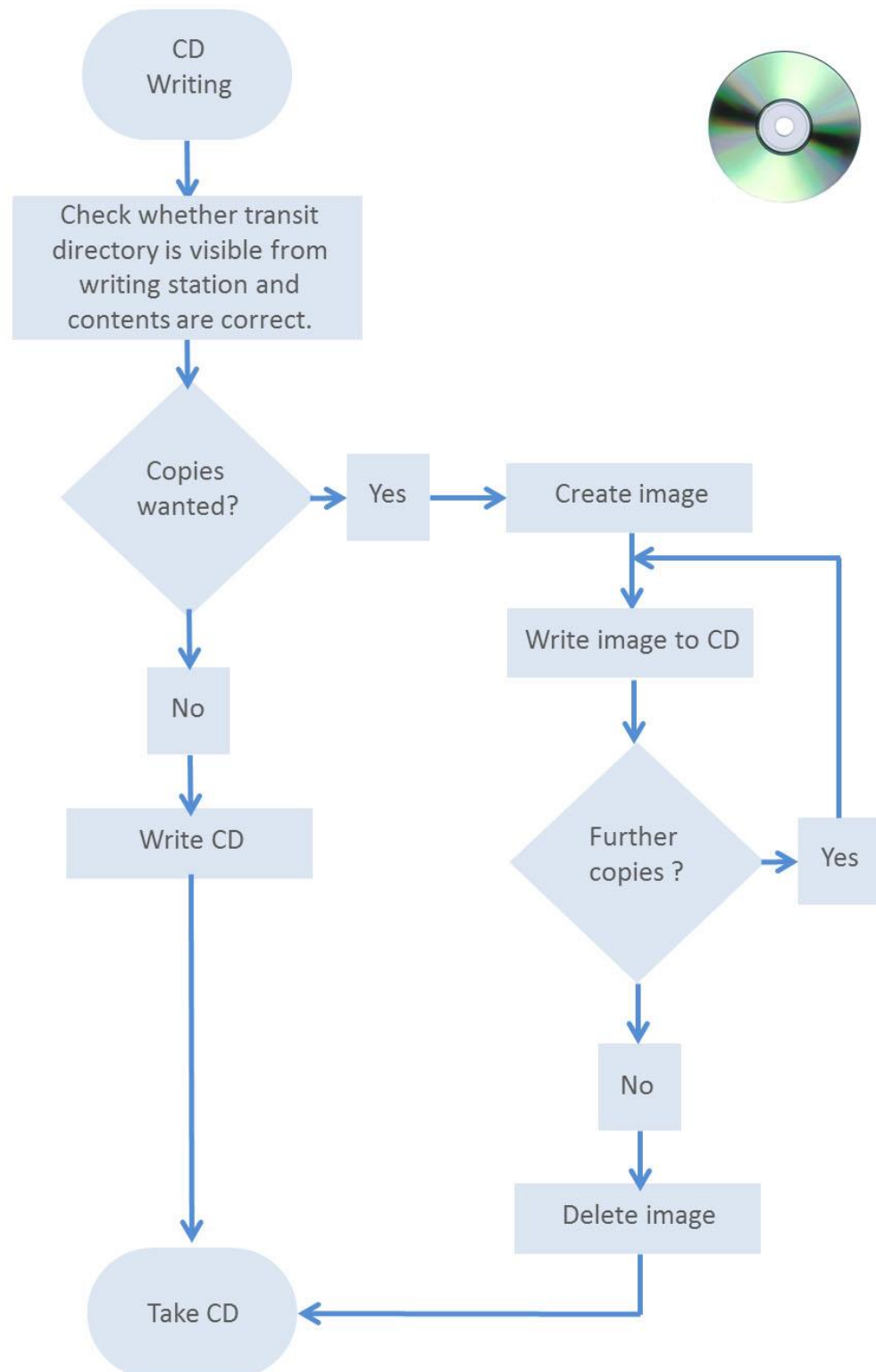
- [CD Preparation](#)
- [CD Writing](#)
- [Take CD](#)
- [CD status of a document](#)
- [Statuses of CDs \(in CD list\)](#)

6.1 CD Preparation



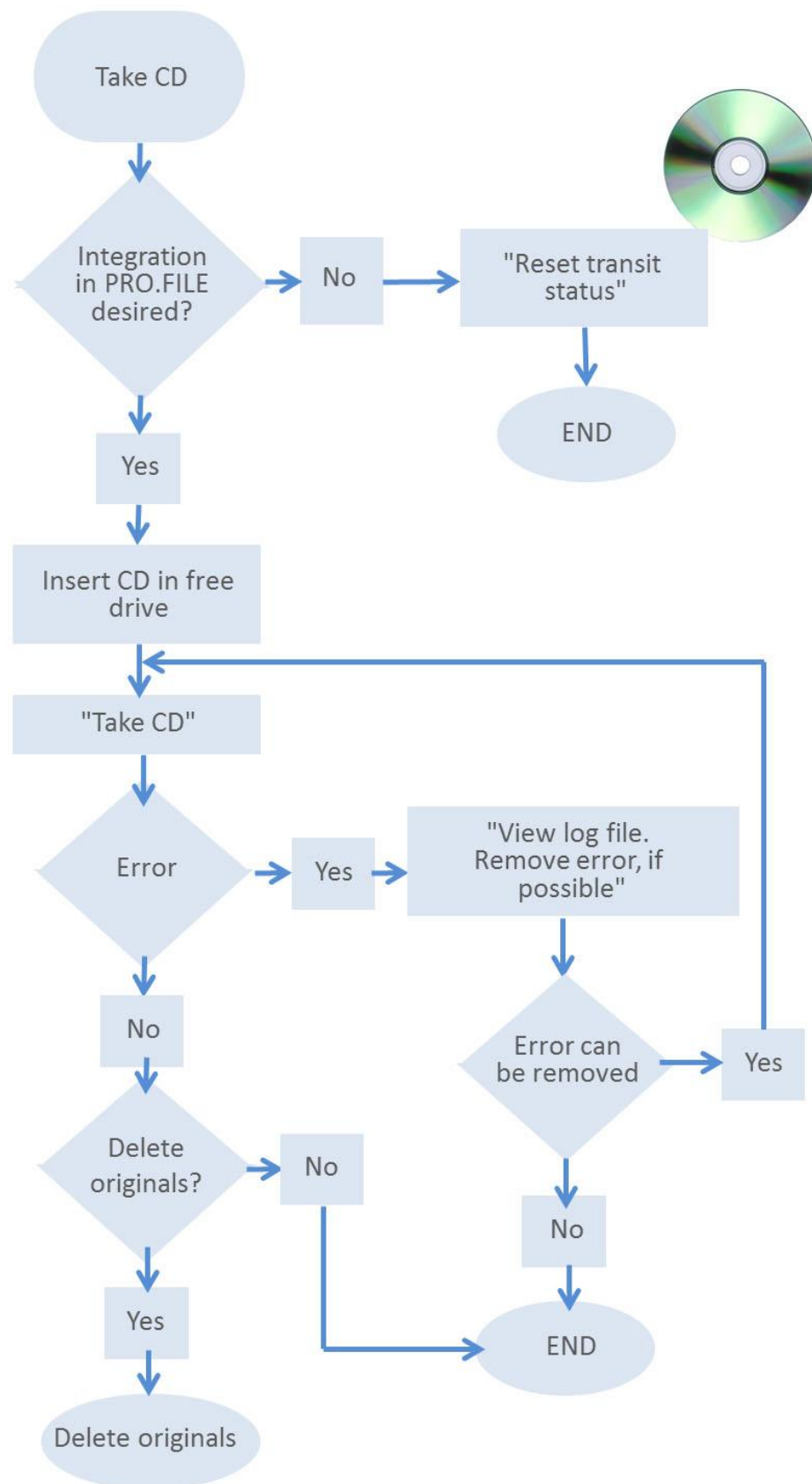
6.2

CD Writing

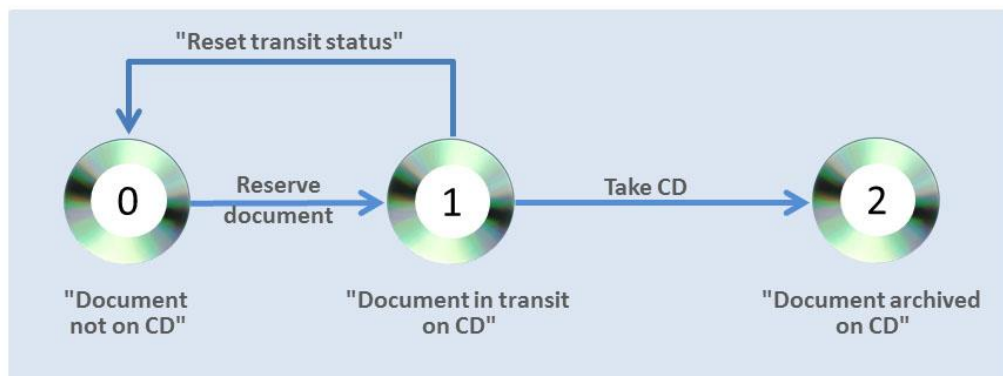


6.3

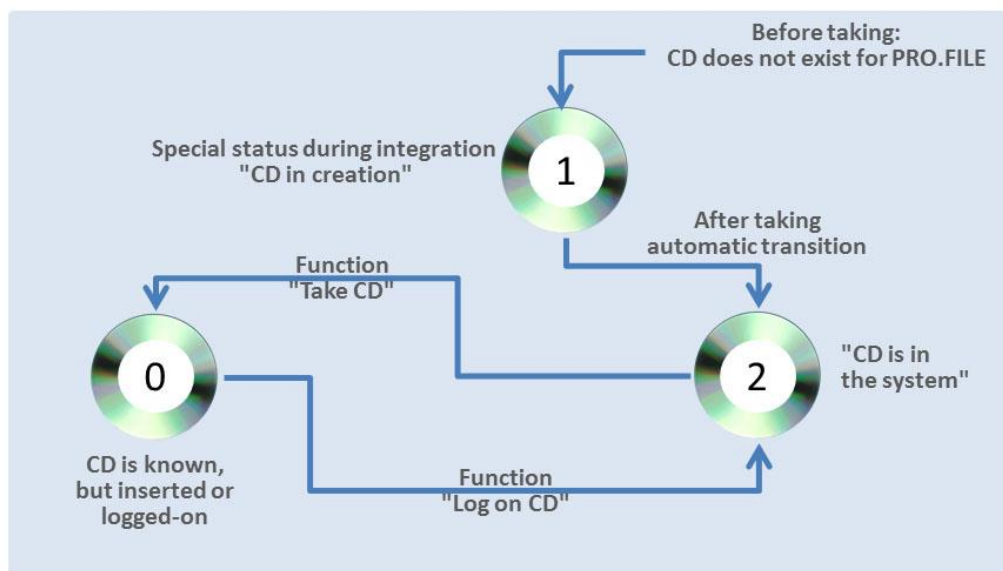
Take CD



6.4 CD status of a document



6.5 Statuses of CDs (in CD list)



7

Index

A

archival	
user steps.....	8
archiving	
administrator steps.....	16
reserve	9
select	8

C

CD list	22
CD preparation	25
CD status of a document	28
CD writing	26

D

Delete	23
delete files.....	23
delete transit status.....	20
Disclaimer.....	6
Display of drawer lists.....	14
drawers	
deposit	15
Drives.....	21
duplicate documents	15

I

Information	23
integration of the CD	19

L

Log-on CD.....	21
----------------	----

M

Managing the transit directory	16
--------------------------------------	----

O

occurrence of errors.....	15
optical archiving.....	6, 7

P

Pick CD	21
Prepare CD	17

R

reservation	
change.....	12
delete	12
manage	12
re-organize lists	13
reserved documents	14
reset transit status	19
resetting the transit status.....	19

S

Settings	22
structure node "CD"	22

T

table of contents.....	3
Take CD.....	21, 27
Test deleting files	23
transfer chart.....	24

U

Unlock	23
--------------	----

W

Writing of the CD	18
-------------------------	----