



Applets

WORLDOX Bulk Document Archive Applet

Summary

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The module may be used by Worldox administrators to facilitate the bulk archiving of documents stored in Worldox profile groups.

Overview:

Many Worldox sites now have significant number of documents in their profile groups which, for reasons of age or matter status, should be moved to archive.

Worldox provides the ability to automate the archiving of documents based on profile field values and document modified dates through its Document Retention module. However in many cases there are such large volumes of documents that would meet the archive criteria that it would, initially, cripple the automated process which is processed by the indexer.

This Applet is intended to simplify the process of archiving large numbers of outdated documents based upon either a simple date (i.e. all files with a modification date prior to a defined date) or by reading a CSV file of Profile Field values (typically client and matter) of file no longer of daily interest.

The Applet can either move files to the archive location of the selected profile group or, alternatively, to another profile group having the same structure as the selected profile group.

Benefits:

The major benefits of moving files to Worldox archive location or an alternate profile group would be to

1. Improve performance of the 'Live' document profile group in terms of searching by users.
2. Improve index Init and Update times by the Worldox indexer (Subject to the deployment of multiple indexer PC's)
3. Free up disk space on primary production file servers

Use

The Applet can be used in four ways

1. Simple date based archiving.

In this mode the Applet will simply walk through the folder tree of the selected profile group checking for files that have not been modified since the set date. Any files that meet the criteria are moved to either the Worldox Archive or a defined alternative profile group which has the same structure as the selected profile group.

2. Simple archiving based on a CSV of profile data such as client\matter codes that you want archived

{Ref: E0042441.1}

In this mode the Applet will read field codes from a CSV file relevant to the selected profile group's field codes, go to the relevant folders in Worldox and move all files found in the folders to either the Worldox Archive or a defined alternative profile group which has the same structure as the selected profile group.

3. A combination of the above.
4. As a tool for selectively purging files from Archive in order to manage the volume of archived documents over time.

In this mode the Applet would read the CSV file of field codes, go to the relevant folders in Worldox and then only process those file not modified more recently than the set date point moving them to either the Worldox Archive or a defined alternative profile group which has the same structure as the selected profile group.

Features:

1. The program can have separate configuration files for each profile group you want to process.
2. The program may be configured to have delays between each folder processed and each file processed so as to prevent excessive performance degradation to you production file server and Worldox indexer.
3. The total number of files to be processed in any one execution of the Applet may be limited so as to prevent excessive performance degradation to you production file server and Worldox indexer.
4. Once configured the Applet may be run from a simple command line and so can be scheduled to occur at specific times using the Windows Scheduler.
5. The Applet has a full test mode which will generate a log of the files that would be archived if the program was run in active mode. This will allow administrators to establish appropriate criteria and estimate file space required on the destination server.

Considerations before use:

Before using the program there are some points to be considered

1. What is the purpose of the archiving?
 - a) Is it simply to de-clutter the active files search returns?

If you just want to de-clutter the active files searches then no additional Worldox configuration is required. However you should consider if primary file server space and indexing performance is likely to become an issue in the future and, if so, you may want to prepare for that by making the changes described below.

- b) Is it to free up resources on a primary file server?

If you want to free up disk space on the primary file server then you will need to configure Worldox accordingly.

Do you want to move the files to the Worldox Archive (recommended) or to Another Profile group?

If you do not already have specific profile groups for archived documents that have the same structure as your active documents then we would recommend using the Worldox Archive facility to re-locate the archived documents to a secondary server. In order to do this you will need to edit the profile definition of the relevant Worldox profile groups and set the archive location to a different UNC path from your primary server. Whichever server the Archive UNC path is set to needs to have sufficient space for the documents which will be moved by the process. This can be calculated by using the applet in test mode which will produce a total file size for the documents that it would process if run in active mode.

If you have alternate profile groups for archived documents then you do not need to edit the profile definitions to specify an alternate archive location but you should ensure that these profile groups are located on a different file server resource than the corresponding primary profile groups and that they too have sufficient disk space to accept the documents to be archived.

2. Are your indexing init and update times excessive?

If your index init and update times are excessive then you may want to consider archiving files to an alternate location. Once the files have been moved to archive your main production indexer will have fewer files to process and will init and update indexes for your live documents much faster. However you will have to implement another indexer to index the files that have been moved to archive or re-located to an alternate archive profile group.

By having multiple indexers you will reduce the time taken to do the init and update of indexes reducing the likelihood that it will overlap with other processes or interfere with the users during normal business hours.

We would suggest that you record the current and anticipated locations of Worldox archive locations / Alternative Profile groups in a table as follows so you can refer to it when configuring the Applet.

Profile Group Name & No	Server / UNC Path	Current Used Space	Current Free space	Doc Size to be moved	Destination UNC Path	Current Used Space	Current Free Space	Free Space after Archive
Client Files #3	\\Primary\DOC S\CLIENT	1017 GB	56 GB	611 GB	\\Secondary\DO CS\Client Note: UNC Location of Worldox Archive as set in the profile definition	23 GB	1587 GB	976 GB
Office Files #4	\\Primary\DOC S\OFFICE	1017 GB	56GB	497 GB	Profile Group Old Office Files # 24 \\Tertiary\WDOX \OFFICE Note: An example of moving to an alternate profile group	152 GB	890 GB	393 GB

Once you have considered the reasons for archiving and configured your Worldox system accordingly then you can move on to configuring and using the Applet.