NEXTpage® v2

DOCUMENT RETENTION

ADMIN GUIDE FOR NEXTPAGE 2 DOCUMENT RETENTION

ADMIN GUIDE FOR NEXTPAGE 2 DOCUMENT RETENTION

INTRODUCTION 2

ADMINISTERING USERS AND MACHINES 3

CREATING A USER. 3

ACTIVATING A USER MACHINE 4

ADDING A USER TO A PROJECT 4

UNDERSTANDING USER AND MACHINE DISABLEMENT 5

ADMINISTERING PROJECTS 5

SETTING UP A PROJECT 5

ADDING A SECONDARY CODE 6

SPECIFYING AN UPLOAD LOCATION 6

ADDING USERS TO A PROJECT 7

WHEN TO START TRACKING 8

ADMINISTERING DATA SERVICES. 8

INTRODUCTION

This documentation describes how to use the web-based admin console for NextPage 2 Document Retention. Typically, you will need to read it only if you are an IT administrator with responsibility for enabling and supporting enforcement of a document-retention policy.

The accompanying document *Deployment Guide for NextPage 2 Document Retention* describes how to set the system up initially. It complements this document, which focuses on the admin console and is therefore relevant to both initial and ongoing administration of users, projects, and data services.

The section *Administering Users and Machines* describes how to create and edit user accounts in the system. A user is any individual who is accountable for obeying your firm's document-retention policy. A user may be inside or outside of your firm; the system requires only that you create a record for each user, with an e-mail address as the unique identifier. In this release, you will manage these records manually; a subsequent release will provide automatic methods for keeping them synchronized with your existing user directory.

The same section also describes how to manage user machines. A user can have multiple machines. Each machine must have the NextPage 2 Document Retention client software installed, and the software must be activated.

The section *Administering Projects* describes how to create projects in the system. A project is the generic term for what your firm may call a *case* or an *engagement*. You will define which users are members of a given project, or which projects a given user is in. In addition, you will define one or more locations for each project where documents are ultimately to reside. Again, you will manage projects manually in this release, but automatically in a subsequent release.

The section *Administering Data Services* describes how to enable and disable data services. A data service, purchased separately from the Document Retention system, is a process that monitors a Lotus Notes database or several shared network drives. This guide describes only enablement and disablement via the admin console; most of the administrative functionality is described in the accompanying guide, *Deployment Guide for NextPage 2 Document Retention.*

ADMINISTERING USERS AND MACHINES

Creating a User

You must create a user for NextPage 2 Document Retention to recognize and track documents a user creates and modifies. A user may be inside or outside of your firm, but must have the Client Service installed and activated on each machine, as described in Deployment Guide for NextPage 2 Document Retention.

To create a new user, log in as an administrator to the NextPage 2 Document Retention Console and click **Manage Users**. Create a new user by clicking **New User.** Then, on the **New User Account** tab, in the appropriate fields, type the new user's first name, last name, and e-mail address. Optionally, select the box to **Send this user an Activation E-mail**. Click **Save & New** to add the new user and then return to the **New User** window to add another user; otherwise, if you are done adding users, just click **Save**.

Note: The decision to send an activation e-mail depends on whether you are ready for the user to activate the Client Service. If your process is to create users or silently install the Client Service on their machines long before training them, then do not send an activation e-mail yet. You can send one at a later time through the Edit User window.

Once created, a user appears in the user list that displays when you click **Manage Users**. To add or modify user attributes, on the user list, click **Edit** next to a specified user. The **Edit User** window contains three tabs that allow you to specify user attributes:

- User Information
- User Machine
- Project Membership

From the **User Information** tab, you can send an activation e-mail to a user. If you click **Edit** on the **User Information** tab, you can modify the name and email address of the user. You can also specify the status of the user as **Active** or **Disabled**.

Note: Disable a user as part of your employee exit process. The effect of disabling a user is discussed in *Disabling Users and Machines*, below.

Activating a User Machine

When the Client Service is first installed on a user's machine, it is nearly invisible to the user and is not yet tied to that user's identity. Activation associates the machine with the user's identity and enables access to the Client Service user interface.

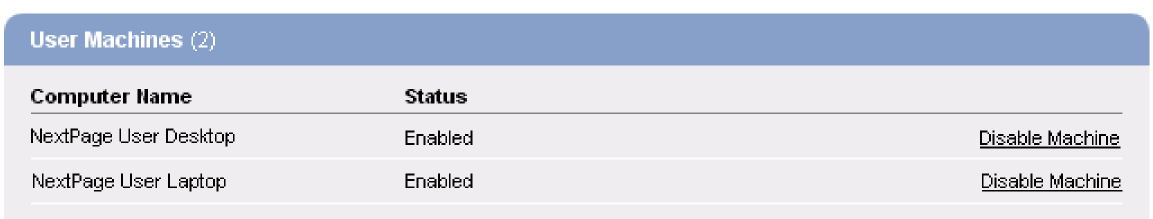
To send an activation e-mail to a user, use any one of the following methods:

- In the **New User Account tab**, select the box to **Send this user an Activation e-mail**.
- n the **Edit User** window, click **Resend Activation Email**.
- On the user's machine, right-click the NextPage 2 Document Retention icon in the system tray, choose **Request Activation Email**, enter the user's e-mail address, and click **Request Email**.

To complete activation, the user double-clicks the attachment as instructed in the e-mail. The attachment contains credentials that can be used only once and expire in a week. Once activation is complete, the machine appears on the User Machine tab, and the user's subsequent actions on project documents are tracked.

You can enable or disable a user's machine by clicking the **Enable Machine** or **Disable Machine** link next to the associated computer name.

Note: Disable a machine when you re-image it and no longer want to include its tracking statistics in project totals. The effect of disabling a user is discussed in Disabling Users and Machines, below.



Adding a User to a Project

You can assign a user to a project through the **Edit User** window or through the **Edit Project** window. For instructions on adding a user to a project through the Edit Project window, follow instructions in the section called *Adding users to a project*.

To assign a user to a project through the **Edit User** window, on the **Project Membership** tab, click **Assign Projects**. In the Add Projects list, locate the project(s) to which you want to assign a user and select the box(es) next to the specified project(s). If you want to notify the user that you have assigned him or her to a project, select the box to **Send an e-mail notifying user that they have been added to new project(s**). When you are done, click **Add Selected**.

Note: Sending this notification e-mail has no material effect; it only informs the user of his or her project membership.

On the **Project Membership** tab, you also have the option to remove a user from a project.

Understanding User and Machine Disablement

Normally, as a user deletes files during final project cleanup or in the normal course of work, the Client Service detects those deletions and updates its records. However, when you re-image a machine or decide that its data is unrecoverable, the Client Service has no opportunity to do so. Disabling the machine excludes its statistics from project reports.

Disabling a user disables all of that user's machines.

If you accidentally disable a machine that is still in active use, the Client Service user interface on that machine is replaced by a dialog box that warns the user of this fact. Although this dialog box prevents the user from gaining access to project reports through that machine, disablement should not be considered to be a security measure in the event that a computer is lost or stolen. A user who can log in can also read sensitive files on that machine, whether or not the Client Service is disabled.

You can re-enable a deactivated machine or deactivated user at any time.

ADMINISTERING PROJECTS

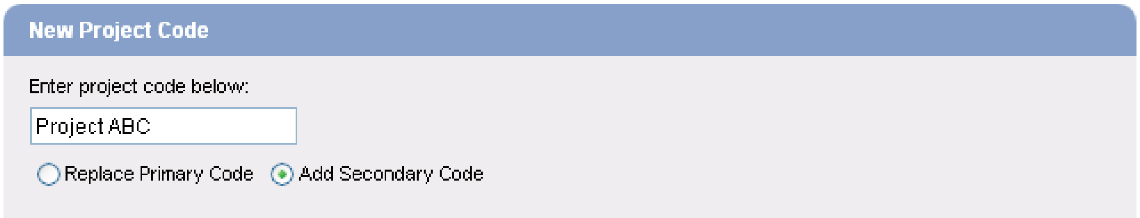
Setting up a Project

To manage projects, log in to the NextPage 2 Document Retention Console and click **Manage Projects**. Create a new project by clicking **New Project**. Then, in the **Primary Project Code** field, type a project code and click **Save**.

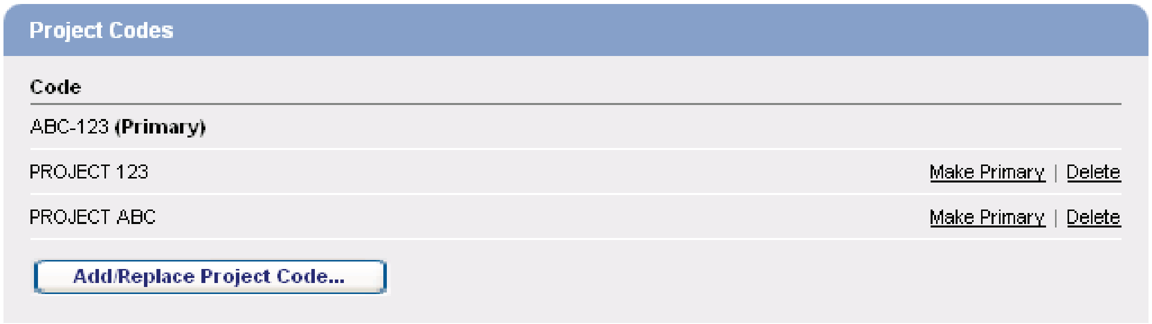
The **Edit Project** page automatically displays to allow you to enter further information. To navigate to the **Edit Project** page at any time, click **Manage Projects** and then click Edit next to the project to be modified.

Adding a Secondary Code

If users created documents before you created a project and communicated the project code, enter the temporary code as a secondary project code as described below. All documents tied to a secondary project code display under the primary code.



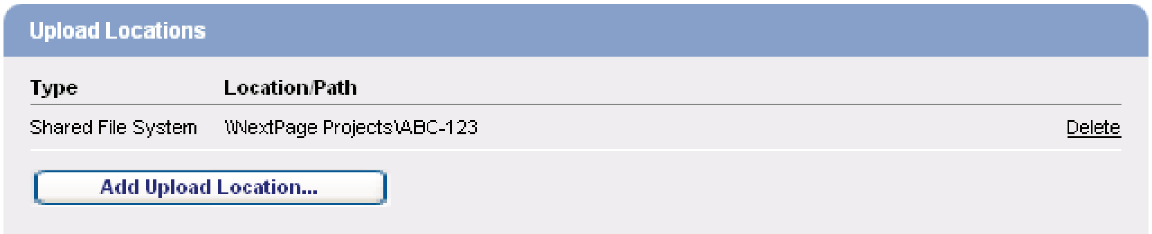
To enter a secondary code, click **Add/Replace Project Code.** In the **New Project Code** field, type the name of the secondary code, select **Add Secondary Code**, and click **Save**. You can add multiple secondary codes to account for any names a user may have assigned as a pending project code.



Specifying an Upload Location

Upload locations appear in the Client Service user interface in a drop-down list of possible destinations for a file upload. An end user can upload files to locations not on this list, but only through methods outside of the Client Service user interface. Whether uploaded inside or outside of the Client Service interface, files at a shared repository are included in project reports only if at a location monitored by a Data Service. Data Services, which are purchased separately, are available today for Lotus Notes and for shared drives.

To specify an upload location, click **Add Upload Location** on the **Upload Locations** tab. On the **New Upload Location** tab, from the **Type** drop-down list, select either **Shared File System** or **Lotus Notes**. In the **Location/Path** field, type the appropriate upload location and click **Save**.



The following sections illustrate the syntax of the Location/Path field for the Shared Drive and Lotus® Notes® Data Service.

NEXTPAGE SHARED DRIVE DATA SERVICE

A shared file system path is a standard Universal Naming Convention (UNC) path:

\\<server name>\<share name>\<subdirectory>

The following are samples of shared-drive upload destinations:

- \\SAN1\finance\merger\SharedDocs
- \\SAN1\engineering\design\GraphicalSpec
- \\SAN1\legal\Active Litigation

These samples assume that the file server SAN1 has shares of *finance, legal,* and *engineering*. Content following the shares represents subdirectory locations.

NEXTPAGE LOTUS® DOMINO® DATA SERVICE

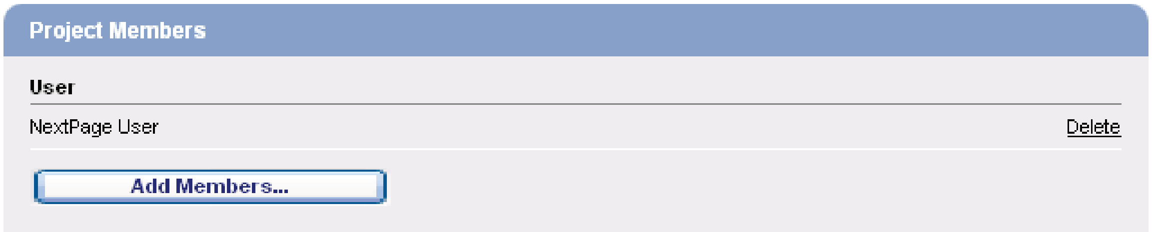
Notes destinations are of the form human.readable.description (server.name:Notes\DB\path). The Notes repository adapter ignores the human.readable.description portion as it is solely to aid users in differentiating between various Notes repository destinations. The Notes repository adapter extracts the information in parentheses, and parses out a server name and a path on that server to a specific Domino database (a colon separates the server name and the path). The following samples illustrate syntax for Lotus Notes upload locations. The pathname after the colon is relative to the Domino data directory.

- Cambridge LIT054 (cam.domino.corp.net:lit054.nsf)
- Cambridge Model Documents (cam2.domino.corp.net:md2006.nsf)
- Raleigh CASE425 (ral.domino.corp.net:templates\cases\425\main.nsf)

Adding Users to a Project

Before you can add users to a project, you must enter the users in the system. If you have not already done so, create users in the **Manage Users** window. If necessary, follow instructions in the section called *Creating a User.*

You can add a user to a project through the **Edit Project** window or through the **Edit User** window. For instructions on adding a user to a project through the Edit User window, follow instructions in the section called *Adding a User to a Project*.



To assign a user to a project through the **Edit Project** window, on the **Project Members** tab, click **Add Members**. In the Add Project Users list, locate the user(s) you want to add and select the box(es) next to the specified user(s). If you want to notify the user(s) of their assignment to a project, select the box to **Send an e-mail notifying new users that they have been added to this project**. When you are done, click **Add Selected**.

Note: Sending this notification e-mail has no material effect; it only informs the user of his or her project membership.

On the **Project Members** tab, you also have the option to remove a user from a project.

When to Start Tracking

NextPage recommends tracking the documents in a project only if tracking can begin at the project's inception. Initiating tracking when a project is already in progress can create multiple document families that represent what is a single document family in the mind of the user. While this issue is not impossible to avoid or compensate for, it can be confusing for novice users, depending on the team's work patterns.

The issue arises because each document family comprises the copy originally tracked, and subsequent copies created by Save As, e-mail, copy/paste, drag/drop, or other means. If multiple working copies of a document are independently tracked, then each becomes the origin of its own document family. What is one document in the mind of the user is therefore represented by multiple rows in the interface.

A team that consistently works from a single working copy through the duration of a project can safely initiate tracking when a project is already in progress.

ADMINISTERING DATA SERVICES

A Data Service monitors tracked files on a central server. Today the Shared Drive Data Service and Lotus Domino Data Service are available and can be purchased separately from the NextPage 2 Document Retention product. Project statistics reflect files that reside on user machines whose status is Active or in locations monitored by Data Services whose status is Active.

All Servers (2)

Server Name	First Contacted	Status	
qa-ex1.thenextpage.net	5/12/2006 3:12 PM	Enabled	Disable Monitoring agent
strain-desk.nextpage.int	5/11/2006 6:24 PM	Enabled	Disable Monitoring agent

To cause a Data Service to appear on this list, install the Data Service as described in the Deployment Guide for the Data Service. It will appear with a status of Disabled until you change its status to Active from this interface.