

everteam

everteam.archive

Product Catalog

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1. Introduction

The everteam.archive solution is a hybrid records management package which can handle both physical and electronic archives. It provides a single secure point of access to the enterprise's archives, whether they are in paper or digital format. A hybrid records management system organizes and manages retention and disposal of all an organization's information, in whatever form it is stored.

All the features of the everteam.archive solution are available from an internet browser, which makes it easy to implement a company-wide solution. Everyone involved can manage records directly depending on his role and rights.

The everteam.archive solution uses your organization's own records management policy to manage records' lifecycle: creation, final disposal (destruction or preservation), planned disposal date, extension of the retention period, deaccessioning etc.

This chapter contains the following sections:

- Features
- Definitions
- How it works

1.1. Main Features

Archival description:

Descriptive information is entered for Archives or records: transfers, containers, folders and/or documents. This description is based on the organization's records management policy.

The data model allows for multi-level descriptions in sequence: any entry point (transfer, container, and folder) may be considered, depending on how your records are organized.

The administrator can add to and modify these data structures and associated workflows to adapt them to the exact level of description required. This module also publishes transfer lists which can be customized when configuring the solution.

Searching and viewing:

It offers a very detailed search on the attributes of each container or document as well as on their location. It is easy to consult contents using hyperlinks between archived items.

Stacks and storing:

It includes hierarchical management of storage spaces. The everteam.archive solution models and manages the rules and constraints related to archiving sites and categories, in order to optimize shelving. The storage process ensures close tracking of linear metrage in storage spaces.

Outsourcing:

This is for managing archives outsourced to external providers. The solution allows you to manage container batches and selected providers with precision.

Record requests:

It handles in real time all operations relating to checking out records, following circuits and flows defined by your organization: reading room loans, issuing documents, renewals, returns, photocopy and scan requests, etc. It offers filters on viewing, depending on the rules defined by the records managers in the record management policy.

Appraisal and disposal:

This involves managing and planning appraisal rules, and record disposal, taking into account archiving rules and storage space usage. This module is based on all the information in the enterprise records management policy (retention periods, processing required, etc.).

Printing:

To keep track of the management flow for records and transfers, the everteam.archive solution provides some printed documents:

- Barcode labels
- Location labels
- Transfer lists
- Outsourcing requests
- Disposal requests
- Records of removal from storage
- Dummy shelf markers for checked out physical archives.

1.2. Definitions

Transferring agencies:

The transferring agency description makes it possible to manage the organization hierarchy and department history (mergers, dependencies, splits, etc.). In this way it is always possible to establish a correlation between the entity which produced the archive and the one responsible for managing it. The original agency is automatically kept in the creator field. If there are many changes of management, the archives contain the agency which originated the transfer and the last known manager.

Transfer:

Once the archives have been described and checked, a transferring agency user, activates the transfer to the archives or records manager.

The transfer is then managed by the archives department or the records manager. After the transfer has been checked, and any changes have been made, the information professional takes custody of the transfer by formally approving it. The transferring user, or agency, can follow the progress of his transfers in real time.

Archival holdings:

In archival science, a fond is the aggregation of documents that originate from the same source. More specifically, a fonds distinguishes itself from a collection through its organic nature, as archival documents that have been naturally accumulated (made or received) by an individual, company, institution, etc. as a product of business or day-to-day activities.

The everteam.archive solution uses the concept of archival holdings to manage historical archives and define a. fonds It is possible to transfer archives between fonds.

1.3. How it Works

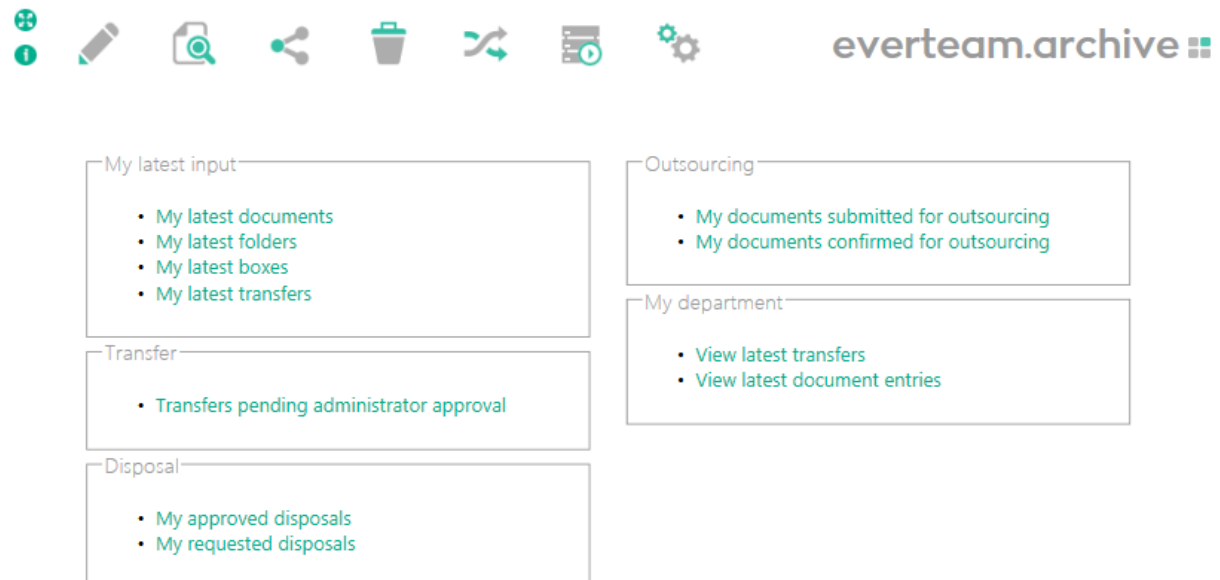
Everteam Connection

To access the everteam.archive solution, a user must sign on to the everteam application:

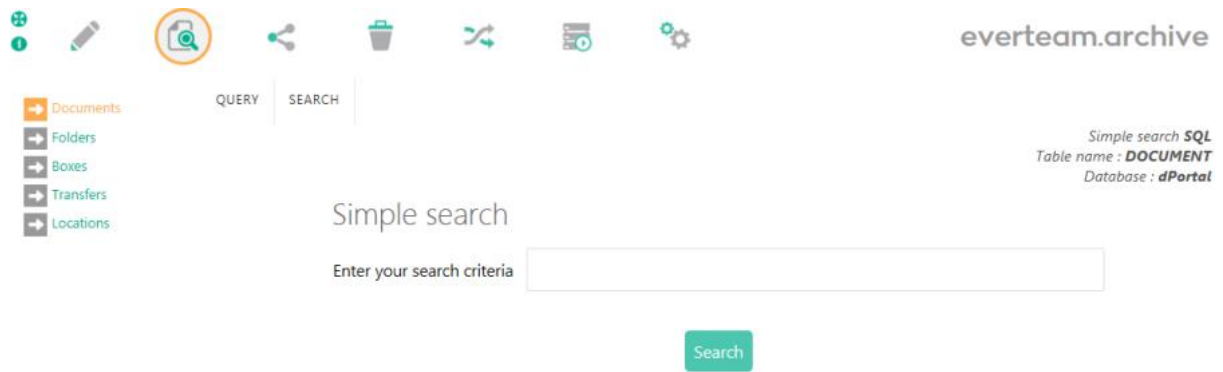


User Interface

As an everteam.archive solution user, you have been given a particular role, as defined in the database by the system administrator. Based on this role, you can access the features and options relevant to you.



If you click on the Search menu, you can access all the search submenus, on documents, folders, boxes, transfers or locations.



Bar for user information and changing department

Records are often described by the records department. In that case, the records manager does it on behalf of the transferring agency. These specific rights are granted only for the current session.

User da

Department :
Direction Générale
(code : DG)

Entering on behalf of :
Direction des Ressources Humaines
(code : DRH)

Departments

- Root
 - Direction Générale
 - Direction des Ressources Humaines**
 - Direction Administrative et Financière
 - Département Service Client
 - Maintenance
 - Production
 - Département Commercial
 - Informatique interne
 - D** Invités
 - Administration
 - Département Archives

Special rights can then be viewed via the icon [User Information]:

User : Administrator Demo ?

Department : Direction Générale / Lyon ?

on behalf of : **Direction des Ressources Humaines / Lyon**

Version : 5.2.14 T_5-2-14

Close

2. Describing Archives: Principles and Practice

Accurate search and filing depend on how the archives are described.

How archives are described and handled depends on the organization and the people involved (archives liaison, occasional contributors, archivists, records manager, etc.).

The structure of the objects managed in the everteam.archive solution is also adapted to your organization's requirements: input forms and controls, etc.

This chapter contains the following sections:

- Overview and definitions
- Describing an archival unit
- Describing a box
- Describing a transfer
- Associating archive items
- Description and arrangement menu
- [Transfer procedure](#)

2.1. Overview and Definitions:

Records are described at different levels depending on the objects being described. All the documents are grouped into folders which are themselves stored in boxes. A transfer is a group of boxes or folders making up a unit of description. Responsibility for the transferring agency's records is passed to the Archives department.

The hierarchical organization offered in the everteam.archive solution reflects this: the starting point for description may be the folder, the box or the transfer.

A **document** is always part of a folder. The document level is not mandatory if records are managed with a single level of description. In that case, archival units will be described at the folder level.

A **folder** may be processed alone or belong to a box. It may or may not contain documents, depending on how the records department works.

A **box** may be processed alone or be part of a transfer. It contains one or more folder(s).

A **transfer** is a group of boxes or folders.

Features

- Enter an archival unit (document or folder)
- Enter a box
- Associate archival units with their containers, and containers with transfers
- Manage the transfer: approval or workflow.
- Concepts
- Authorities

Archival description always depends on information inherent in the operations of the company or institution which produces them. This information is managed by the administrator and makes up what are known as authority lists:

- The agency which created the document
- The document's record type: these can be in a hierarchy with levels.

Access to these lists, when entering descriptions, depends on user rights and the enterprise records management policy.

Records Management Policy

Its record type always determines a document's retention period, and possibly also the period before outsourcing and its closed period.

Thus, the choice of a particular record type and medium (physical, digital or hybrid) to identify a document, triggers the automatic update of some dates, like the planned disposal or outsourcing date, and affects the date and terms of access, if it can be outsourced and/or disposed of.

The type is set when describing archival units. These fields will determine dates for disposal or outsourcing as well as accessibility. The type may also be set when inputting the box.

Sites

As well as being described, objects are **associated with a site** which depends on the transferring agency or the user who entered them. The site is described in the storage module. It is the top level in the description of storage locations. But apart from storage considerations, sites are also referred to when issuing or disposing of objects. It is therefore **mandatory** to fill out the **Site** field in every archival item, when it is not deduced automatically by the system.

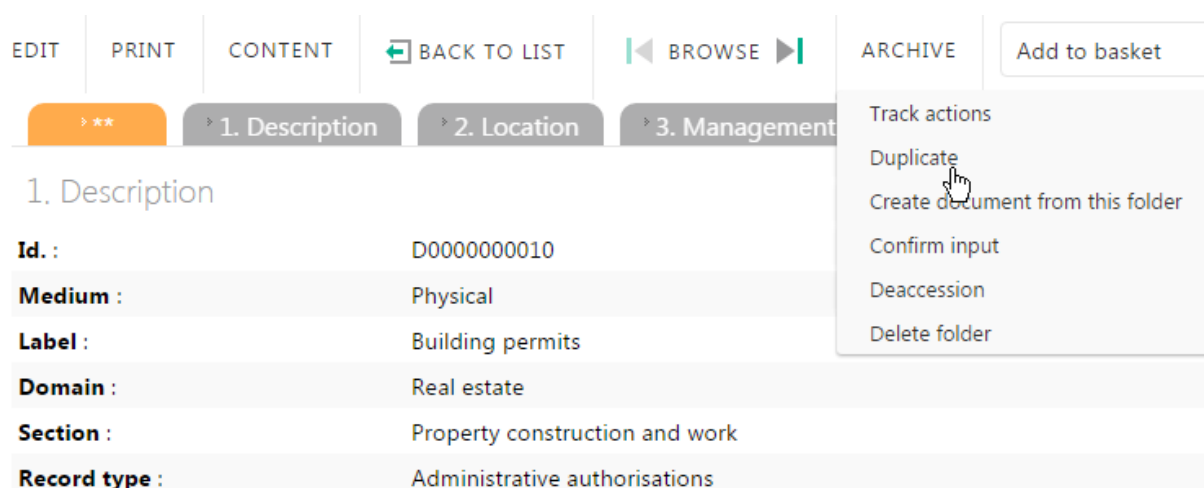
2.2. Describing an Archival Unit

How it Works

Entering an archival unit (document and/or folder) consists of describing its contents and providing management information. Document input is often initiated from the folders which contain them. Standard forms for inputting and updating descriptions are included in the standard package. It is the administrator's job to customize them.

Access

By accessing the description menus, you can open input forms for Documents, Folders, Boxes and Transfers.



There are three input tabs: 1. Description 2. Location, 3. Management.

Tabs	Fields	Remarks
Description	Record type	Mandatory field: To select from the drop-down list or, if using a record type list imported from the Rules repository service, filled out automatically based on the values in the Repository / Domain / Section fields.
	Reference	Free text
	Label	Free text
	Notes	Free text

	Nature	Either Current records or Archival holdings
	Security	Empty: visible to everybody/ Department: visible only to the creator's group or department/ Private: visible only to the creator
	Medium	Archival unit medium: physical, digital or hybrid
	Accessible	May be inherited from the record type selected : Value: Yes or No.
	Repository	Value chosen from items at the top of the record type tree
	Domain	The list of possible values is displayed based on the repository selected.
	Section	The list of possible values is displayed based on the folder selected.
Management	Start date	Date of the oldest document
	End date	Date of the most recent document
	Disposition	May be inherited from the record type selected : Disposal or Retention
	Disposable	May be inherited from the record type selected : Value: Yes or No
	May be outsourced	May be inherited from the record type selected : Value: Yes or No.

The three record type elements are selected using autocomplete: just place the cursor in the field and use a keyboard arrow key to go through possible values. If your administrator has configured it, the fields relevant to the record type will be displayed based on your choices.

Viewing an archival unit

An archival unit's description contains extra management information. Such as actions carried out on a document.

Actions log

on table DOCUMENT Key : 5443

Date and time	Action	User
08/02/2017 17:18:02	Description.VALIDE	admin
09/02/2017 10:32:54	Description.VALIDE	admin
15/02/2017 10:38:28	Record requests.PRETE_CONTENANT	admin
15/02/2017 15:04:10	Disposal.PROPOSE	admin
15/02/2017 15:12:37	Disposal.REFUSE	admin

And until input is confirmed, some information can be updated.

2.3. Describing a box

How it works

Entering a box consists of describing its contents and providing management information for filing and storing. Standard forms for inputting and updating descriptions are included in the standard package. It is the administrator's job to customize them.

Access

Selecting the Description menu gives you access to the description menus, in which you can open input forms, in this case for Boxes.

Box input form

The Boxes menu displays a list of the boxes which you have already created or modified.

A box has three types of information: description, arrangement and management.

- > **
- > 1. Description
- > 2. Location
- > 3. Management

1. Description

Record type internal key :

Box :

Type :

Label :

Nature :

Security :

Medium :

2. Location

Position :

Provider's ref. :

3. Management

Start date :

Retention period start :

Updated disposal date :

Disposition :

Box input form

Tabs	Fields	Remarks
Description	Record type	Chosen from the list of record types. It is preferable for the record type to be inherited from the folders and documents in the box
	Box	Non-enterable field, calculated automatically
	Type	Chosen from: archival box, filebox, cabinet, microfiche, plan etc. The size of the boxes depends on the values in the CONT_TYPE table.
	Label	Free text

	Nature	Empty or chosen from the options entered in the NATURE table. (Current records, Archival holdings, etc.) (cf. everteam.archive solution parameter)
	Security	Empty: visible to everybody/ Department: visible only to the creator's group or department/ Private: visible only to the creator
	Medium	Archival unit medium: physical, digital or hybrid
Position	Position	Storage code
	Provider's ref.	Free text
Management	Start date	Date of the oldest document
	End date	Date of the most recent document
	Intended disposal date	Document disposal date
	Disposition	<i>Inherited from the record type selected.</i> Disposal or Retention

Location and Management Tabs

Boxes are stored based on the type of documents they contain. The record types available are the ones set up by the administrator for the department (Rules repository service).

2. Emplacement

Emplacement :



Réf. tiers archiveur :

3. Gestion

Date de début :



Date de fin :



Date d'élimination désirée :



Sort final :

Elimination



Input form for a box - Location and Management tabs

The information in these tabs is **optional**. If it is omitted, how the box is managed depends on the description of the archival units it contains.

Depending on the retention schedule for the type of documents in the box, the date range and the desired disposal date are calculated automatically and updated every time a new archival unit is inserted.

Quick Description

The everteam.archive solution allows for rapid entry of archival items, by **keeping data entered** from one record to another.

Viewing a Box

A box's **description** contains extra management information. Some information has not yet been defined or calculated, as it is dependent on various processes.

EDIT PRINT CONT... ARCH... Add to NFZ4...

B0000000001
D0000000001 Planning annuel

1. Description

Box : B0000000001
Type : Boîte/Box 20 cm
Size (centimeters) : 20
Folder count : 1
Retention period start : 10/10/1990

2. Location

Site : Lyon
May be outsourced : Yes

3. Management

Status : In preparation
Created on : 18/01/2017
By : da
Initial disposal date : 10/10/1997
Disposition : Elimination
Disposable : Yes
Transferring agency : Département Archives

4. Record requests

Accessible : Yes

Updating a Box

Until input is confirmed, some information on the Box can be updated.

2.4. Describing a Transfer

The transfer is at the top of the hierarchy of archival items. It does not correspond to a physical entity and is not mandatory. The information recorded for it is purely descriptive, such as:

- The transfer's label
- Its nature: Archive holdings or Current records
- Its start date
- Its end date

> **
> 1. Description
> 2. Status
> 3. Management

1. Description

Transfer ref. :

Label :

2. Status

Nature :

None
 Current records
 Holdings

3. Management

Start date :

Retention period start :

Submit
Submit and insert
Submit and modify
Restore

Transfer input form in the Description/Transfers menu

2.5. Associating Archive Items

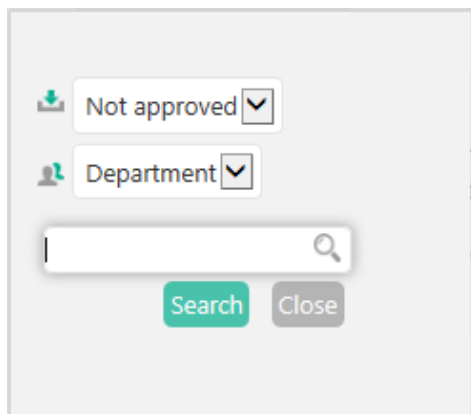
It is possible to associate descriptive records for boxes, folders and documents with each other.

2.6. Description and Arrangement Menu

In this menu you can link archive items with each other, as well as create, update and delete them. Depending on how you choose to configure your application, it may completely replace the previous menus, Description and Arrangement. This tool is intended for professionals who manage archive items on a daily basis.

Search Filter

In each section, below the number of items available, the icon displays the quick search form for the table containing the displayed items







Display Filter

When you open the menu, the everteam.archive solution displays the latest items entered with the possibility of viewing earlier ones ([Display more results...]).



Note that an item is selected in different ways depending on where it is displayed:

In the left panel, you simply click on a line to select the item. You cannot select more than one item at a time.

In the right panel, items are selected by checking them in the table. One or more items may be selected. Updates can only be done on a single selection, while it is possible to delete and print a multiple selection.

Archives folders : 5 available    

No.	<input type="checkbox"/>	Id.	Transferring agency	Responsible dept.	Record type internal key	Label	Site	Box #	Location	Provider
1	<input checked="" type="checkbox"/>	D0000005436	14		Contracts 2016		Lyon			
2	<input type="checkbox"/>	D0000005435	14		Payslips 2016		Lyon			

Archives folders : 5 available    

No.	<input type="checkbox"/>	Id.	Transferring agency	Responsible dept.	Record type internal key	Label	Site	Box #	Location	Provider
1	<input type="checkbox"/>	D0000005436	14		Contracts 2016		Lyon			
2	<input checked="" type="checkbox"/>	D0000005435	14		Payslips 2016		Lyon			

Deleting a folder in the right panel of the Description and Arrangement menu

Displaying and Unlinking

everteam.archive offers the possibility to detach linked records from the main item.

2.7. Transfer Procedure

Once everything has been entered and links set up between archival items, the input must be finalized. This is done at the top level, which, in most cases, is the transfer.

We will refer to it as the **transfer procedure**, which after establishing links, consists of:

- **Confirmation:** generally done by the user who did the data entry and linking (transferring agency or archives department).
- **Approval:** often done by the archives department, which carries out this operation on behalf of the transferring agency.

The person who confirmed or approved a document is identified in its record; the document remains the property of the transferring agency. When record managers describe items for the transferring agency, confirmation and approval are generally given at the same time.



After approval, the items may be stored or outsourced, checked out, and eventually disposed of.







The transfer procedure may be carried out in one of two ways, depending on how your application has been configured:

- Via everteam.archive solution: the transferring agencies then the archivists find the transfers to process using the Search menu, select them and then carry out confirmation, approval, and print actions.
- Via the transfer approval workflow: this makes it possible to trigger a sequence of steps for tracking transfers once they are **confirmed**. In that case, an extra menu is available in the everteam.archive solution.

Transfer Workflow

A transfer is created in the everteam.archive solution description and arrangement screens and menus. The transfer workflow starts when the transfer is confirmed in the everteam.archive solution.

Number of hits: 2 Corbeille Utilisateurs  Pages: 1 / 1 

No.	<input type="checkbox"/>	Id	 Label	 Role	 Task date	 Custom Attributes
1	<input type="checkbox"/>	152	Transfer to process		14/02/2017 - 12:34:56	
2	<input type="checkbox"/>	151	Transfer to confirm		14/02/2017 - 12:34:37	

3. Searching and Associated Actions

In the everteam.archive solution, a search is often the starting point for new input or for carrying out a procedure on a selection, such as a request for check out, outsourcing or disposal.

This chapter contains the following sections:

- Basics
- Searching boxes
- Searching documents
- Searching folders
- Searching transfers
- Search locations

3.1. Basics

The Search menu lets you search for the different objects described:

- Documents
- Folders
- Boxes
- Transfers
- Locations

Documents | Folders | Boxes | Transfers | Locations

QUERY | SEARCH

Simple search SQL
Table name : **DOCUMENT**
Database : **dPortal**

Simple search

Enter your search criteria

Search

Standard simple search form

The drop-down menus in the results list and the descriptive record view depend on the type of object being searched, which means that relevant actions are readily available.

3.2. Searching Boxes

Archival boxes may be found using a great number of criteria. The search produces a results list which depends on the user's role, and in particular his department and function.

Transfer ref. =

Responsible dept. =

Label =

Production site =

None
 Lyon
 Paris

Nature =

Approved on =

Results List

The result is a list of boxes which match the criteria. The actions available for the selection depend on the user's profile.

EDIT SEARCH CONTENT PRINT EXPORT ADMINISTER ARCHIVE Add to basket Boxes

Boxes : 223 Results (0 object(s) selected)

Advanced sort

Thumbnail List Lines per page: 100 OK Pages: 1 2 3

N.	Box	Label	Nature	Site	Position	Type	Provider	Issued to	Folder count	Initial disposal date
1	B000000005	Sed tempus tincidunt lorem.	Current records	Lyon		Carton/Container 15 cm	Archives Externes	2		07/12/1991
2	B000000006	Cras sed risus.	Current records	Lyon		Bolte/Box 20 cm	Archives Externes	3		18/11/2022
3	B000000009	Etiam at lectus.	Current records	Lyon		Bolte/Box 20 cm	Archives Externes	3		01/02/2002
4	B000000011	Praesent quis metus.	Current records	Lyon		Bolte/Box 20 cm	Archives Externes	3		28/09/2003
5	B000000012	Etiam venenatis, pede eu condimentum rhoncus,	Current records	Lyon		Bolte/Box 25 cm	Archives Externes	2		12/05/2012
6	B000000013	Morbi vitae lorem in magna posuere condimentu	Current records	Lyon		Bolte/Box 25 cm	Archives Externes	3		27/04/2004
7	B000000014	Aliquam lacus magna, elementum ac, accumsan v	Current records	Lyon		Bolte/Box 25 cm	Archives Externes	2		11/12/2003
8	B000000015	Nulla sed mi.	Current records	Lyon		Bolte/Box 25 cm	Archives Externes	3		23/08/1992

Actions available for a selection

For an archivist (or an administrator) with all the rights, the list of Archives actions available for this user on the results list, is shown under the ARCHIVE drop-down menu:

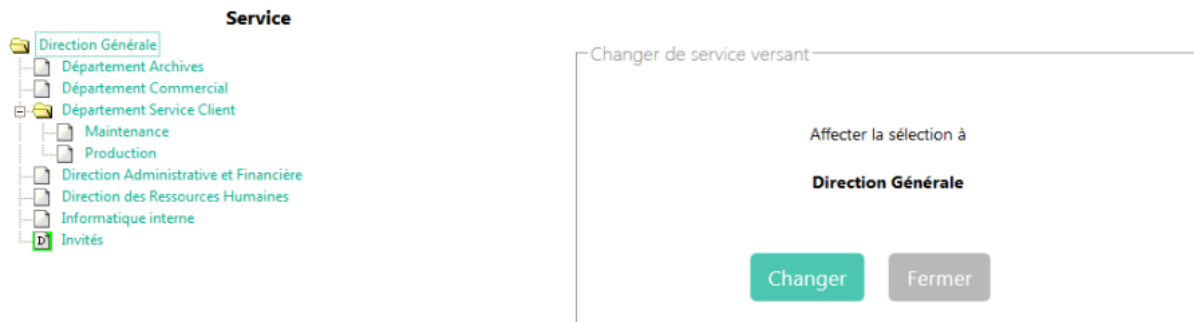
Each operation can be carried out on all the selected boxes. The menus are for:

- Transferring the selected boxes to the holdings
- Confirming input of the selected boxes
- Changing the transferring agency for the selected boxes
- Attaching the selected boxes to a new transfer
- Placing the selected boxes in the stacks
- Removing the selected boxes from the stacks
- Outsourcing the selection
- Adding the selection to a disposal request
- Deaccessioning the selected boxes

- Adding the selection to a record request
- Printing the barcode labels.

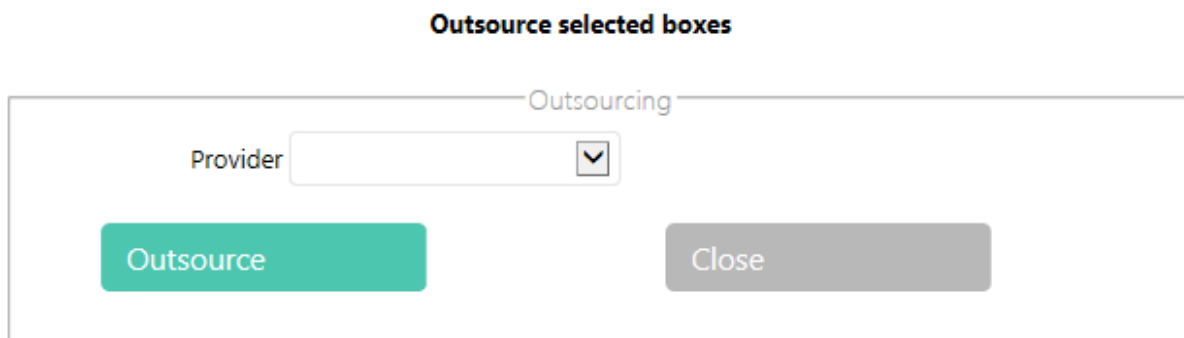
Confirm input

Automatically change the status of the selected boxes from **in preparation** or **to be confirmed**.



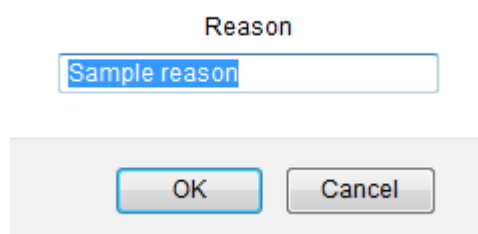
Outsourcing the selection

Stored boxes may be outsourced.

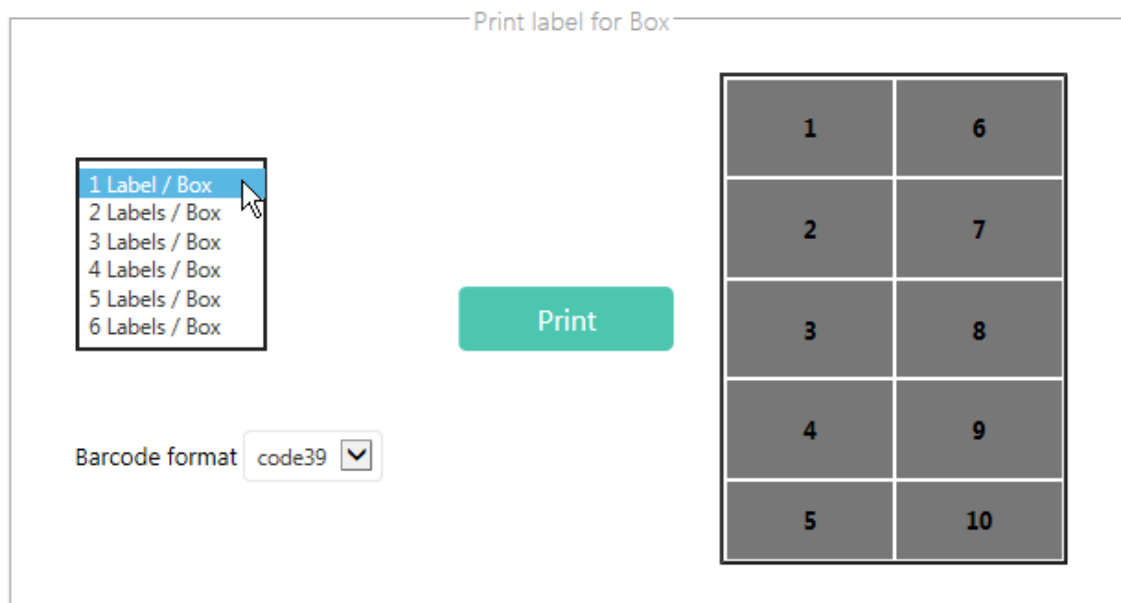


Deaccession

Deaccession requires the reason for deaccessioning the box to be entered.



Printing the barcode labels.



For each box, you can print from one to six barcodes.

The printed document gives the barcodes in human-readable and graphical form. The latter can be read by a barcode reader.



3.3. Searching Documents

There are document-specific actions in the ARCHIVE drop-down menu (please refer to the "Search boxes" paragraph for more information):

- Transfer selected documents to the holdings
- Confirm input of selected documents
- Change the transferring agency for selected documents
- Deaccession selected documents
- Add the selection to a record request
- Print barcode labels.

3.4. Searching Folders

There are folder-specific actions in the ARCHIVE drop-down menu (please refer to the "Search boxes" paragraph for more information):

- Transfer the selected folders to the holdings
- Confirm input of selected folders
- Change the transferring agency for the selected folders
- Attach the selection to a new box (see "Describing a box/Quick input" chapter)
- Deaccession selected folders
- Add the selection to a record request
- Print barcode labels.

3.5. Searching Transfers

Confirm Transfer

Transferring agencies or archivists find transfers to process in the Search menu,

Print transfer list

The transfer is the operation in which documents pass from the transferring agency to the archives department. The documents in a transfer are described in a transfer list, a list giving the reference, title and date range of the items in it. Thus, for a given transfer, this list includes all the documents transferred to the archives department.

Transfer list

Creation date 08/02/2017
 User Administrator Demo
 Department Direction Générale
 Transfer reference 2
 Label Praesent ac mi.
 Number of boxes 7

Box No.	Size (centimeters)	Archives folders	Label	Record type	Retention period	Folder start date
B000000011	Bolte/Box 20 cm	D000000101	Nam in erat.	Facture Fournisseur	18/07/1960	14/08/1928
		D000000104	Curabitur ut leo vel fells posuere commodo.	Avoir Client	28/09/1998	15/05/1922
B000000012	Bolte/Box 25 cm	D000000107	Vestibulum interdum risus quis sem.	Journal comptable	01/06/1976	16/02/1979
		D000000110	Nulla pharetra.	Chèque	12/05/1992	08/06/1929
		D000000116	Maecenas nunc.	Vérification de Service Régulier	24/01/1986	02/04/1930
B000000014	Bolte/Box 25 cm	D000000130	Morbi sed massa.	Chèque	19/08/1996	25/11/1925
B000000015	Bolte/Box 25 cm	D000000133	Vivamus congue wisi elementum tellus.	Bon de livraison	11/12/1993	07/01/1963
		D000000141	Etiam gravida, justo ac condimentum interdum,	Facture Fournisseur	23/08/1987	10/04/1945
		D000000144	Cras vulputate eulsmo massa.	Avoir Client	15/12/1984	11/01/1939
B000000016	Bolte/Box 25 cm	D000000147	Sed arcu est, convallis et, rhoncus at, posue	Journal comptable	07/04/1981	12/10/1933
		D000000150	Quisque dul.	Chèque	08/01/1959	04/02/1946
		D000000153	Fusce at justo.	Bon de livraison	18/03/1997	05/11/1940
B000000018	Bolte/Box 40 cm	D000000156	Maecenas tincidunt neque at tortor.	Vérification de Service Régulier	10/07/1994	07/05/1928
		D000000170	Morbi sit amet enim eleifend nulla porta auct	Chèque	15/04/1963	02/12/1923
		D000000173	Mauris vel quam sit amet erat mattis condimen	Bon de livraison	07/08/1960	22/04/1936
B000000019	Bolte/Box 40 cm	D000000176	Vestibulum ante ipsum primis in faucibus orci	Vérification de Service Régulier	17/10/1998	24/10/1924
		D000000184	Donec condimentum.	Avoir Client	11/08/1951	07/09/1956
		D000000187	Praesent congue dolor at metus.	Journal comptable	03/12/1948	18/08/1925

3.6. Search Locations

Specific tools associated with searching locations are available in the ARCHIVE drop-down menu (please refer to the next chapter):

- Reserve positions
- Release positions
- Print labels

4. Storage

This chapter contains the following sections:

- Summary
- Storing

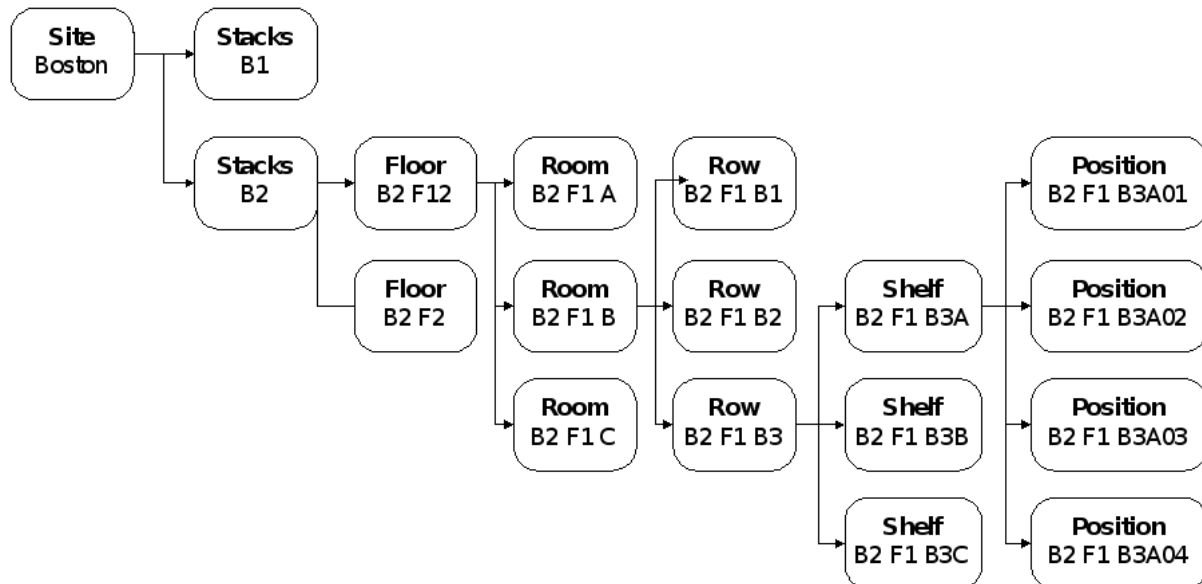
4.1. Summary

The everteam.archive solution's storage module has a graphical interface which makes it both powerful and flexible.

Archival storage spaces are defined by the database administrator. The archives department then analyzes these spaces to assign them to the archives boxes it has custody of. There are therefore two steps:

- The administrator describes the storage space.
- The user stores the boxes.

An archives site may have a hierarchical structure which is more or less complex, but whose top level is always the site and the lowest level is a position.



A box is placed at a position based on the size of the position and the size of the box. The everteam.archive solution offers two actions: place boxes in the stacks and remove them from the stacks.

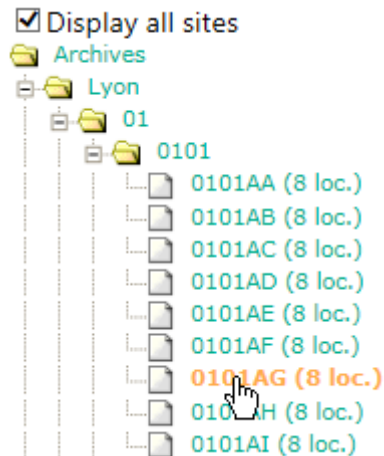
4.2. Storing



Basic concepts

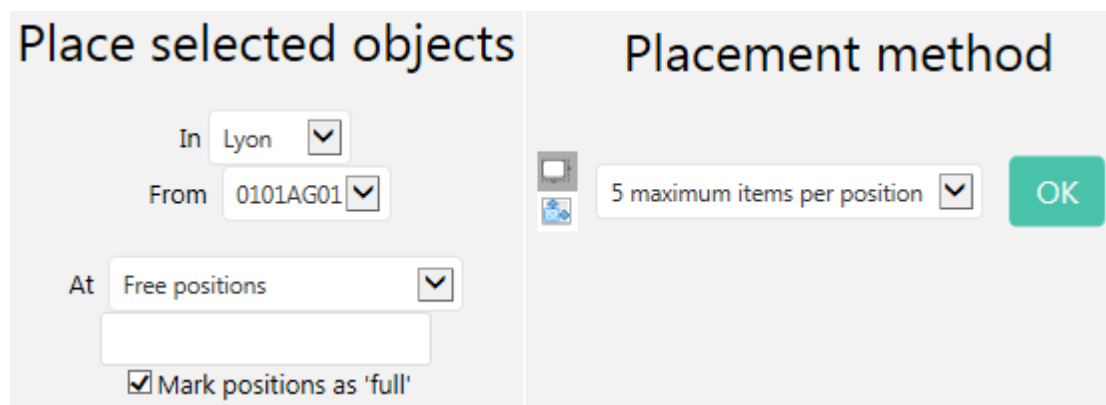
Boxes are placed in the stacks after being selected in a search results list.

The storage window is in three parts:

- Choice of position or higher level: site, stacks, shelf, etc.



- Choice of placement method, automatic or customized. The everteam.archive solution can manage placement by metrage depending on available space ( icon), or by position ( icon). The At drop-down list allows you to choose positions with free space or reserved by the user's department.



- Information on position availability (number of positions and linear meterage) depending on the previous choices.

Position(s) from
0101AG01 to 0101AG08

Position	No. Im
Free positions	8 4,00

Close

Rules

Boxes are **positioned automatically** according to the following rules:


- Automatic assignment of boxes depending on their respective sizes and up to the limit of the available space on the shelf. The **size of the position** is the first constraint, then the **size of the box**.
- If the size of the box to be placed is greater than the space remaining at the position, the box is automatically placed in the next one.
- If the size of the box to be placed is greater than that of the largest available position, the placement fails. There are no overrides.

Options

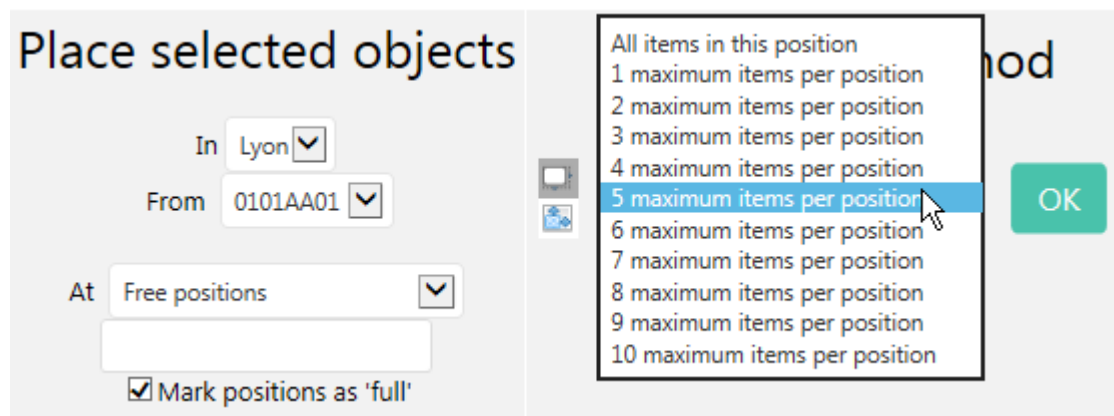
The three possible options are based on the order of the boxes before placement.

1. Keep the order (**MethodKeepOrder**): the boxes are placed strictly in the order in which they were selected by the user. In particular, any sort done on the box list is taken into account. The default sort is on box code. For example, if the boxes have been sorted by label, they will be placed in that order.
2. Optimize occupied space (**MethodFillSpace**): Boxes are placed using an algorithm which analyzes the size of each box in order to optimize occupation. The batch of boxes is therefore not positioned in any particular order.
3. Optimize space (big items first) (**MethodFillSpaceBiggerFirst**): boxes are placed using an algorithm which analyzes the size of each box in order to optimize occupation (as in the previous option) but taking big boxes first. If the boxes' metrage corresponds exactly to the metrage on the shelving, the shelving will be marked as **full**.

Assign position by position

Placing boxes by position ( icon) does not take into account at all the size of either the boxes, or the position. There is no automatic calculation. It does strictly what the user wants: she can force the number of boxes she wants at any given position.

Thus, however many boxes are added at a position, occupancy calculated will never exceed the maximum size of the position (maximum space occupied equals the size of the position).






Before assigning location codes, the system requests confirmation.

The everteam.archive solution displays a summary of items placed.

- 2 item(s) placed
- 1 position(s) used
- View boxes' location

Boxes' location appears after refreshing the results list, in the **Position** column.

N..	<input type="checkbox"/>	▲ Transferring agency	▲ Box	▲ Label	▲ Nature	▲ Site	▲ Position	▲ Type
1	<input type="checkbox"/>	 Direction Générale	B0000000009	Etiam at lectus.	Current records	Lyon	0101AA01	Boîte/Box 20 cm
2	<input type="checkbox"/>	 Direction Générale	B0000000011	Praesent quis metus. Etiam venenatis, pede eu condimentum	Current records	Lyon	0101AA02	Boîte/Box 20 cm
3	<input type="checkbox"/>	 Direction Générale	B0000000012		Current records	Lyon	0101AA02	Boîte/Box 25 cm

When you click on a position, its record is displayed:

Code :	0101AA01
Level :	4
Levels :	0
Size (cm) :	50
Upper level :	18
Created on :	20170208140124
Item count :	5
Occupied space (cm) :	50
Available space (cm) :	0
Ref. :	418
Shelf (yes/no) :	0
Position (yes/no) :	1
Marked 'full' (yes/no) :	1

If the **Position** field contains 1 (yes), this means that it is at the bottom of the hierarchy.

Printing location labels

The everteam.archive solution storage module includes the possibility of printing a series of labels for a batch of boxes which have been stored.

Print location label

From

To

1	6
2	7
3	8
4	9
5	10

Print position contents

In the same way as for the location labels, select the range of positions using the **from** and **to** fields. The interface offers to print the contents of the selected position.

Print list of items by location

0101AA [Print inventory](#)

5. Importing Archive Data

The everteam.archive solution includes an import module in the record manager's interface. The various import solutions are for creating new archival items (boxes, folders or documents) but also for updating them as and when necessary, and when exchanging information with providers during outsourcing, check out or disposal operations.

Importing new data into the database is the responsibility of the archives department.

Some of these import actions may be available to archives staff in your customized everteam application.

This chapter contains the following sections:

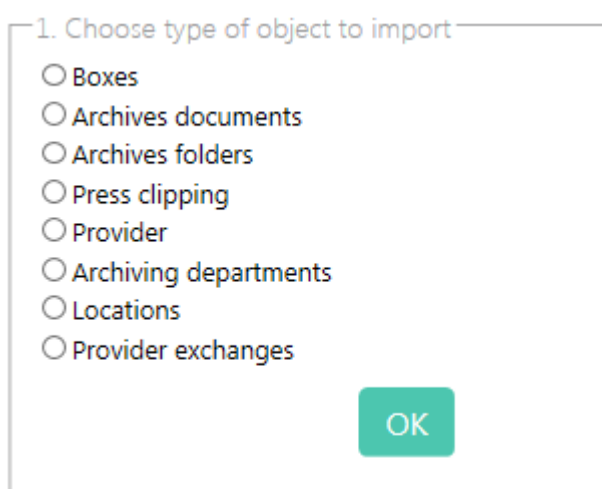
- Import file format
- How import works
- Tools available before importing

5.1. Import File Format

Whatever the import mode, the import data file must be in EXCEL (MS) or CSV format. The latter is an open format containing tabular data ("comma-separated values").

How Import Works

Click on the Import menu. Select the type of data to import:



1. Choose type of object to import

- Boxes
- Archives documents
- Archives folders
- Press clipping
- Provider
- Archiving departments
- Locations
- Provider exchanges

OK

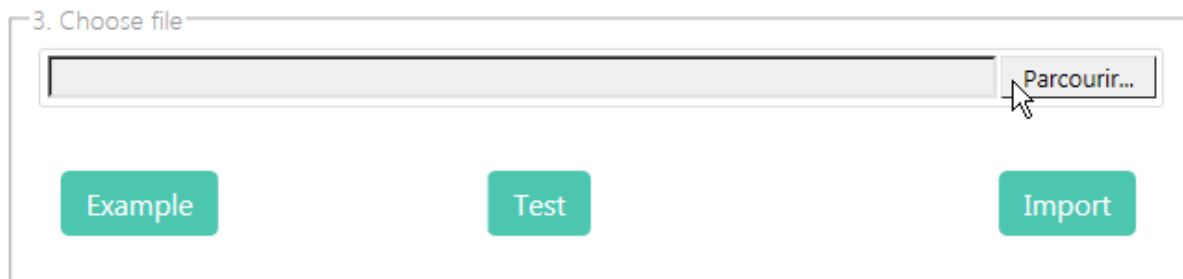
Actions

When importing, several operations may be performed, either individually, or in a logical sequence, for example:

- Place in stacks
- Stocktaking
- Remove from stacks
- Confirm input
- Confirm input + Place in stacks
- Data Import
- Import data + Confirm input
- Import data + Confirm input + Place in stacks

Import file

The import file is selected in the file system.



Before launching the import, the system tests [Test] the quality of the data file and gives you an example of the minimum data configuration in the file [Example].

5.2. Tools Available Before Importing

Example

The [Example] button displays data format templates:

Minimum field list, based on the actions selected previously.

Field names may be the real name in the database or the label in everteam.

Test

The [Test] button is for checking the quality of the import file. If mandatory fields are missing or field names are incorrect, the system displays the logs which will help you correct the file before restarting the import.

<input type="checkbox"/>	B0000000632	GAGNAN Bons de livraison	Production	Lyon
<input type="checkbox"/>	B0000000633	GAGNAN Factures	Production	Lyon
<input type="checkbox"/>	B0000000634	GAGNAN Courriers	Production	Lyon
<input type="checkbox"/>	B0000000635	MOULINOT Bons de livraison	Production	Lyon
<input type="checkbox"/>	B0000000636	MOULINOT Factures	Production	Lyon

Result of importing the data file in the example.

6. Records Disposal

This chapter contains the following sections:

- Basic concepts
- Creating disposal request lists

6.1. Basic Concepts

Records disposal is the procedure which results in the destruction of documents whose retention is no longer justified. Disposal is derived from the retention schedule, and in particular from the retention period, from which the planned disposal date is calculated automatically.

Some documents are excluded from the disposal process, for example documents with historical value for the company, essential business documents, with great legal or technical value. Their disposition is retention.

In most cases, disposal is suggested by records managers to the responsible department, who either approves it or extends the retention period.

The everteam.archive solution offers several ways of managing disposal of archive boxes. Workflow can also be used.

When disposing of boxes, the everteam.archive solution takes into account the contents of each box to be disposed of. Thus, information on the folders or documents in the box will also be transferred to the table of folders and documents to be destroyed or disposed of.

Disposal request list

A disposal request list is a request to dispose of a set of boxes or folders. Each request confirmed by the requester may still be modified by the disposals manager before the items are actually disposed of.

The disposals manager can follow the progress of disposal request lists and move them from one status to another: *Pending approval*, *Approved* and *Completed*.

A disposal request goes through the following statuses:

- *In preparation*
- *Approved*
- *Completed*

An approved disposal request refers to items which may not always be disposed of for various reasons, for instance the disposal date has not been reached. This information is recorded for the item itself.

6.2. Creating Disposal Request Lists

A disposal request list is created after searching the boxes managed by the archives department.

Add to a new disposal request list

Label

Notes

Pending approval

Users can view the disposal request lists which have not yet been approved by the archives department:

Pending approval
 Approved
 Completed

Disposal request lists (1) Pages: < 1 > Lines per page 10

No.	<input type="checkbox"/> By	Created on	Label
1	<input type="checkbox"/> admin	14/02/2017	Acme Inc. disposal

They can remove an item from the disposal request before it is approved.

Approved

Using this feature you can accept or reject disposal of items in the list and request destruction.






- There are several options for a selection of items in a disposal request:


Early destruction allowed: 5 days


Toolbar for a selection of items in a disposal request

[Accept disposal]: accept disposal of the selected items,











[Reject disposal]: Reject disposal of the selected items,

-  [Change transferring agency]: allow another department to become the manager of the items due for disposal (e.g. Archives department)
-  [Use override to force disposal]: force disposal of the selected items using an override (sets the disposal date to the current date).
-  [Change disposal date]: replace the disposal date of the selected items with the current date or a later date. If the desired date is later than the calculated date, the status of the element goes to Extended
-  [Change disposition]: Change the disposition of the selected items, after choosing a value in the dropdown list to the left of the icon.
-  [Remove]: remove the selected items from the approved list.

The  option [Send request to provider] lets you send a request for destruction of the selected items to the appropriate outsourcing provider(s). This only applies to items with *Requested* status: their status goes to *Sent to outsourcing provider*. After confirmation by the outsourcing provider, the status goes to *Destroyed* and the item is marked as having been deaccessioned. It is possible to cancel this, but the user will have to cancel the request for destruction directly with the outsourcing provider.

The  option [Change transferring agency] allows you to keep items whose disposal was requested in the records department, after selecting a department and confirming with a click on the [Change] button. They are no longer connected to the original transferring agency but are not disposed of.

Service

-  **Direction Générale**
-  Département Archives
-  Département Commercial
-  Département Service Client
 -  Maintenance
 -  Production
-  Direction Administrative et Financière
-  Direction des Ressources Humaines
-  Informatique interne
-  Invités


Changer de service versant

Affecter la sélection à

Département Archives

Changer
Fermer

Changing department

The  option [Change disposal date] allows you to postpone the disposal date to the current date or later, after entering a reason and confirming with a click on the [Change] button.



Changing the disposal date

Print disposal request lists

In the list of disposal request lists, the  icon on the left, [Print request list] prints the selected disposal checklists.

The list may be sent to the transferring agency so that it can confirm disposal of each box on the list. Then the records manager runs the disposal operation in the database and removes the boxes from the stacks. When this list is returned, it will be used by the manager to confirm disposal, by reading the barcodes in the Disposal > Items to be destroyed menu.



Printing a disposal request list

Start destruction

In the list of disposal request lists, the icon on the left, [Start destruction] starts the procedure for destroying the items on the selected disposal request lists. ONLY request list items whose status is **accepted** are disposed of. The disposal request list no longer appears in the Approved list and can now be viewed in the Completed list. Click on the [Completed] tab to check it.

Completed requests

The items in a request list are listed under tabs according to status (destroyed or not). At this stage in the disposal process, no tools are available as nothing can now be changed.

Boxes		Folders				
No.	Disposition	Responsible dept.	Box	Initial disposal date	Updated disposal date	Disposal status
1	Disposal	Administration	B0000000626	25/06/2001		Rejected
2	Disposal	Administration	B0000000627	01/02/1997		Rejected

Disposal workflow

A disposal request list is created in the everteam.archive solution screens and menus. The Disposal workflow starts when the disposal request is confirmed in the everteam.archive solution (icon [Approve request list]).

The disposal request tasks to be done are accessible in my tasks > Disposals menu. There is a task for every disposal request to be processed.

In the example below in my tasks > Disposal menu, a task for a disposal request list:

No.	<input type="checkbox"/> Id	Label	Role	Task date	Custom Attributes
1	<input type="checkbox"/> 205	New checklist		15/02/2017 - 03:12:37	
2	<input type="checkbox"/> 203	New checklist		15/02/2017 - 03:01:41	

Task list for disposal requests to be processed

Track items to dispose of

The everteam.archive solution has another interface for managing disposals, item by item, via the Disposal > Disposal management > Items menu. This work space makes

it possible to **confirm** or **reject** disposals, based on the barcodes on the boxes/folders to be disposed of.

By default, the screen is in [Confirm disposal] mode, but a click on [Reject disposal] changes the mode. Then it is just a case of scanning barcodes with a barcode reader.

Reject disposal



Please enter below the barcode of items whose disposal has been confirmed by the owner agency

Confirming disposal

Confirm disposal



Please enter below the code of the items whose disposal has been rejected by the owner agency

Rejecting disposal

Processing

For these two options, the system sends a message of confirmation or error, depending on the status of the box:

[Confirm disposal]:

Requested goes to Accepted

Accepted remains Accepted

Rejected remains Rejected

Date not reached remains Date not reached

[Reject disposal]

- Requested goes to Rejected
- Accepted goes to Rejected
- Rejected remains Rejected
- Date not reached remains Date not reached

Choose the [Confirm disposal] option and scan the barcodes with the barcode reader.

The everteam.archive solution sends a message of confirmation, [OK] or error if the date has not been reached. Rejection cannot be overridden in this environment.

Managing items to be destroyed

Items to be destroyed menu offers a disposal request list summary and access to real disposal actions on boxes, physical folders and digital documents. The Barcode menu allows you to enter item barcodes directly and confirm disposal.

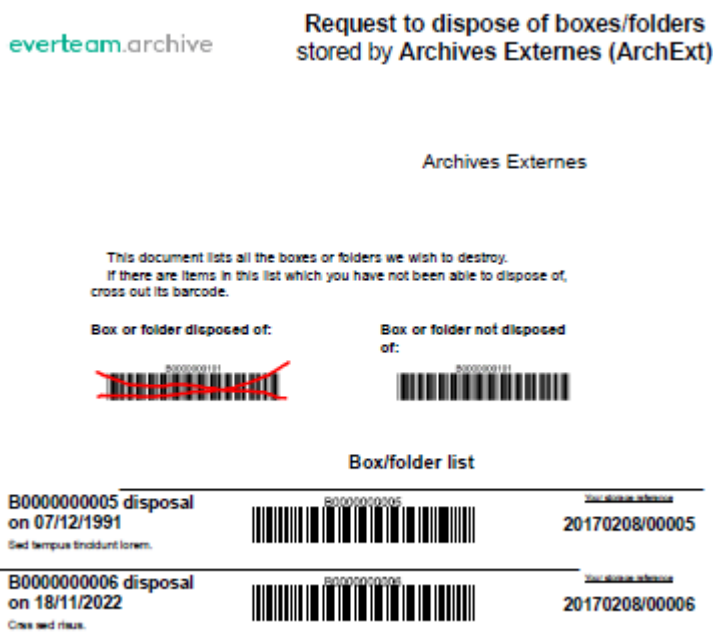
Actions on items to be destroyed are available in the ARCHIVE menu:

- Destroy item
- Print disposal checklist

If outsourcing provider exchange is enabled, the following menus are also available:

- Print provider request
- Send request to provider
- Print provider request

The ARCHIVE > Print provider request drop-down menu is for printing the confirmation list to be sent to the outsourcing provider.



Printing provider disposal request

Send request to provider

The ARCHIVE > Send request to provider drop-down menu lets you send a request for destruction of the selected items to the appropriate outsourcing provider(s). This only applies to items with **Requested** status are: their status goes to **Sent to outsourcing provider**. After confirmation by the outsourcing provider, the status goes to **Destroyed** and the item is marked as having been deaccessioned. It is possible to cancel this, but the user will have to cancel the request for destruction directly with the outsourcing provider.

Destroy item

Destroy item drop-down menu triggers real disposal of the item. The item disappears from the table of items to be destroyed and is inserted into the table of destroyed items, with status **Accepted**.

The everteam.archive solution disposes of boxes virtually. Removing them physically from the shelves is made easier by printing out the disposal checklist, containing the location references (in ascending order) and the code of each box.

This checklist is given to the stack attendants so that they can remove the boxes to be disposed of from the stacks.

Box removal checklist

everteam.archive

This document lists boxes disposed of in the everteam.archive solution, which are now to be removed from the stacks.

Estimated linear meters released: 0.6 lm

<u>Site</u>	<u>Position</u>	<u>Box code</u>	<u>Size (cm)</u>	<u>Label</u>
Lyon	0301AF08	B000000039	20	Suspendisse at dui.
Paris	0401AA01	B000000038	20	Aliquam porttitor, purus sit amet ornare dict
		B000000040	20	Class aptent taciti sociosqu ad litora torque

Checklist of boxes to be disposed of

Managing items which have been disposed of

Thus, information on the boxes and documents disposed of are stored in the tables for boxes, folders and documents which have been disposed of. All this information can be accessed using the same search criteria as for archival boxes and documents.

7. Records Encryption

- Files can be encrypted using a Symmetric transformation (Symmetric key). A different key is used for each document
 - Symmetric encryption is fast but requires only one key for decryption (AES 128/192/256 bits)
- Asymmetric keys offer a slower but more efficient approach
 - The key is also encrypted using an asymmetric approach
 - This system works with small size key for better performances
- provides a pair of private and public keys
 - The public key is used to encrypt the symmetric key
 - The public key is stored in an encrypted file
- can only decrypt encrypted documents using its private key
- Selecting a custom key
 - Certificates: same as asymmetric keys but the key is in an official external key file
 - Asymmetric keys: slower and a bit more complex. The public key can be used outside the database
 - Symmetric keys are easy to use and fast but not useful if the data needs to be encrypted outside of the database

8. Document Impress

- The document impress is used to identify a document and make sure that the document was not altered at any phase of its life cycle after archival
- The document impress is calculated while it is archived
 - Calculates the impress of a document when archiving it. An impress is a condensed text representing a document
 - Documents cannot be regenerated from impresses but an impress can be recalculated anytime from the document
 - Whenever needed, a new impress can be calculated and compared to the original one to make sure that the document has not been altered
 - Document impresses are stored in an encrypted file and protected by everteam.archive

9. Audit Trail

- Whatever storage technique used, it is essential to deploy a quality process in order to constantly monitor and duplicate stored documents before the end of life of the storage media
- everteam.archive can be configured to regularly monitor and perform the following
 - List and report on the number of media used
 - Analysis of the used technologies
 - Duplication of documents stored on old storage spaces
 - Migration of stored documents on newly installed media
 - Regeneration of indexes and traces of all operations performed on documents
 - Audit of the all everteam and System components
 - Logging of all events

10. Outsourcing Storage

This chapter contains the following sections:

- Introduction to outsourcing
- Manage outsourcing providers
- Creating outsourcing requests
- Tracking outsourcing operations

10.1. Introduction to outsourcing

The everteam.archive solution includes a menu for outsourcing records, while retaining the possibility of checking them out. A transfer may contain a batch of outsourced boxes and a batch which remain in the stacks.

Outsourcing archives boxes is the responsibility of an authorized archives user.

The everteam.archive solution allows detailed management of outsourcing submissions and of providers.

The Outsourcing menu gives access to the following three submenus:

- Item management
- Items
- Barcode
- Disposal request
- Providers
- Outsourcing procedure

In the everteam.archive solution, outsourcing a box consists of removing this box and adding to its descriptive record the information about this operation:

- Outsourcing status (outsourced or not)
- Outsourcing date
- Provider name
- Outsourcing reference supplied by the provider (optional).

It is then up to the archives department to remove the boxes from the stacks if they had already been stored. These two operations are independent and do not need to be done in a set order.

The outsourcing date is first calculated when the box description is entered, using the box end date and the interval in the retention schedule (Record type of its documents).

This gives the period for which outsourcing is possible. Then it is updated again when outsourcing is confirmed, to the current date, to show the actual outsourcing date for the box.

An outsourcing slip is printed first and sent to the provider so that he can give the archives department his own references. This slip is returned to the archives. The references are recorded and outsourcing can be confirmed.

The update includes the folders and documents in the box and outsourcing information is "cascaded down" to each associated descriptive record.

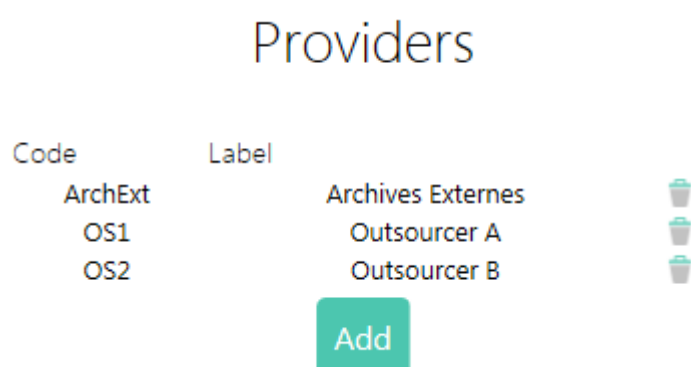
Outsourcing provider

Different reasons may lead you to call on an external provider to look after your archives. He will be able to take charge regularly of batches of boxes, to store them but also to enable search and return of documents requested by transferring agencies. The provider may also be asked to destroy documents and to add new documents to boxes whose description has not been completed.

The providers table contains a description of the company: name and code, address and contact information.

10.2. Manage Outsourcing Providers

Choose the Outsourcing > Providers menu. The management window lists all the providers on the left, and on the right, users can update a description or enter information on a new provider. A provider has a name and a code which are used in the reference lists when outsourcing



Outsourcing > Providers menu

Everteam allows users to enter a new provider or Modify information on an existent provider.

1. General
2. Contact
3. Address

1. General

Provider code :

Label :

Out of date :

2. Contact

Phone number :

Fax number :

email :

3. Address

Post Code :

Provider input form

10.3. Creating outsourcing requests

Outsourcing requests are drawn up by the archives department, based on box searches or reading box barcodes in offline mode. These features provide:

- Searching boxes to outsource
- Check the boxes to outsource.

Reading barcodes of boxes to outsource

Choose the Outsourcing > Item management > Barcode menu.

Submit for outsourcing

Provider



Select the provider from the drop-down list. Scan barcodes of boxes to outsource.

10.4. Tracking Outsourcing Operations

Users can send request to provider by printing the outsourcing slip or by directly sending it to provider.

Confirm outsourcing

Outsourcing can be confirmed by:

- Manual confirmation
- (Manual) import of a file containing the outsourcer's box references
- (Automatic) import of box references via the connector.

When the outsourcing slip is returned by the provider, his references are entered and the submissions are confirmed.

Restrict the list to requests to the provider in question. At this stage, each item may be confirmed or cancelled individually. Processing can also be carried out on the whole list by checking the box above it.

Items submitted for outsourcing

Filter by provider OS2 - Outsourcer B



Select : Cancel Confirm OS2_0217

<input type="checkbox"/>	Reference	Cancel	Confirm	Description	Outsource to	Request sent
<input type="checkbox"/>	B0000000012	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Etiam venenatis, pede eu condimentum rhoncus,	OS2 - Outsourcer B	
<input type="checkbox"/>	B0000000013	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Morbi vitae lorem in magna posuere condimentu	OS2 - Outsourcer B	
<input checked="" type="checkbox"/>	B0000000031	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Phasellus ut ligula.	OS2 - Outsourcer B	
<input checked="" type="checkbox"/>	B0000000032	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Duis nunc.	OS2 - Outsourcer B	

Once outsourcing the boxes has been confirmed, the everteam.archive solution updates the box description with the name of the provider, the code entered when confirming and the outsourcing date. The description of folders or documents in the box is also updated.

View outsourcing data

All the data on outsourcing a box, a folder or a document may be consulted in the descriptive record of the items themselves.

2. Location

Provider :	Outsourcer B
Provider's ref. :	OK1
Site :	Lyon

3. Management

Status :	Approved
Start date :	08/06/1929
Retention period start :	12/05/1992
Initial disposal date :	12/05/2012

