

# File Attender®

Version 6.4x

**White Paper**



**S H E R P A**  
S O F T W A R E

File Attender is a member of the Attender Utilities family

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## 1. Introduction

File Attender is a Lotus Notes-based file management product that manages the files on a user's hard drive or on a Domino server. Included would be any files on any random access storage that the user or server can address (File server, WORM, SANS, NAS, JukeBox, etc.). The management is automatically performed by File Attender's enforcement of File Restrictions created by Lotus Notes administrators. These File Restrictions can locate/manage the files in three ways; by file age, by file name and by file size.

The administrator also has the ability to specify the locations (drives/folders) within which the files are to be managed. For instance, the administrators could specify 'c:\my documents\\*' to only process the files found within this folder structure. Once a file has been located via the specified method, the administrator has six different actions that can be taken:

Archive – This will moves the files from the current location into a specified destination and leave a short cut behind in place of the original file, to facilitate locating the file in its new location.

Collect - This will simply collect information about the files.

Copy – This will make a copy of the file into the specified destination. The destination can be any device to which the user has 'write' rights.

Delete – This will permanently delete the files.

Move – This will move the files from the current location into a specified destination. The destination can be any device to which the user has write rights.

Rename – This will rename the extension for the files.

Legal implications regarding attachments contained within email messages have become a very visible issue and many steps have been taken to manage the attachments properly. However, this should not be the end of the concern. If a user saves an attachment to his/her hard drive, the problem still exists, but on a much broader scale. So now the issue is, how to manage the attachments that have become permanent files. File Attender was created to allow the administrators to manage these permanent files, not because of the space being used, but more because of what these files might contain.

## 2. Benefits

### Reduce your exposure

Each day, we hear of lawsuits being made because of email content. Many times, the emails in question have attachments that contain important information. Once a user has saved an attachment, you might not be aware of its existence until the user's computer is searched and these important files are found. Imagine the things that users might be saving. Everything from offensive/pornographic files, to files that contain 'for your eyes only' kind of corporate information that should never be seen by anyone outside of the company.

With File Attender, a company can reduce legal liabilities by enforcing policies that properly manage these files.

### Return on investment

The return on investment for File Attender is simple; manage the files that exist on a user's hard drive! Prevent corporate information from falling into the wrong hands. Prevent an employee from suing the company because of being offended by an off-color file.

### 3. Product summary

File Attender exists to allow companies to protect themselves. The files that exist on a user's hard drive are the responsibility of the company, not of the user.

#### Release information/schedule

The first release of File Attender was in May 2006. The initial version of the product contained the ability to manage user files only.

A new version of File Attender is released at least annually. Each version will contain new features and address confirmed issues. In addition, interim quarterly versions of File Attender will address confirmed issues that require immediate updates.

## Supported versions/platforms

File Attender 6.4x leverages the functionality found within Domino 6.x, 7.x and 8.x. This means that File Attender 6.4x will function on Domino 6.x/7.x/8.x servers, but is not supported on Domino 4.x and Domino 5.x servers. Within the release of File Attender 6.4x, the version of File Attender will always reflect the minimum version of Domino that can support it.

File Attender has been successfully tested on all Domino platforms. Since File Attender is written in LotusScript, it is platform-independent. There is only one File Attender code-stream, meaning that a platform-specific File Attender does not need to be installed. This means that if a server's and/or user's platform is changed, the version of File Attender that resided on the server prior to the platform change can also be used on the new platform, regardless of what it is.

## Server impact

File Attender does not perform much processing on the Domino server, unless the server is to be processed as well. Even if the server's files were to be processed, the amount of processing that occurs would most likely only be for less than one hour. A local agent within the user's personal name & address book performs all of the processing of the user's hard drive.

## Frequently asked questions

### Architecture

**What version of Domino must my servers be running?**

File Attender requires that your servers are running 6.x, 7.x or 8.x.

**What files are placed on my Domino server?**

File Attender is self-contained within a Lotus Notes database. There are no other files to be placed on the servers.

**How does File Attender work?**

File Attender uses scheduled LotusScript agents to perform all of the server/user processing.

**Does File Attender update the Public Name and Address Book?**

No. All Name and Address Book accesses are references (read) only.

**Does File Attender update my server notes.ini?**

No. There are no .ini settings required.

**How does File Attender work with clustered servers?**

Clustering does not affect File Attender. The home server's agent processes each mail database.

**Does File Attender work on partitioned servers?**

Yes. Partitioning has no affect on File Attender.

**Do I need to update my mail templates?**

Yes. In order for File Attender to function on the user's hard drive, a change must be made to the 'PostOpen' Database Scripts.

**What mail templates are compliant with File Attender?**

Any mail template that was supplied by Lotus is functional with File Attender.

**Are customized mail templates a problem?**

No. The customization does not affect File Attender.

**How many versions of File Attender do I need if my servers/users have different platforms?**

One. There are no platform-specific versions of File Attender.

### Permissions

**What access does File Attender require to the mail databases?**

File Attender only requires 'Editor' access. A series of profile documents will be added to each mail database.

**Whose permissions is File Attender using to access the mail databases?**

Whatever ID (Server/user) signed the File Attender agent, is the ID being used to process the mail databases.

**Can I sign the File Attender agent with my server ID?**

Yes. This is a very common practice. Some companies also choose to use a 'generic' administration ID to sign the agents.

## Migration

**What must I do when I migrate my servers' operating systems?**

Nothing. There is only one code-stream for File Attender.

## Installation

**How do I install File Attender?**

An installation database is provided that will perform all of the installation steps.

**Do I need to physically visit every server?**

No. All server installations can be performed from your Lotus Notes client.

**Do I need to bring my server down/up after installing File Attender?**

No. This is not required or needed.

**How do I uninstall File Attender?**

Simply delete the File Attender databases, remove the mail template changes and the product is uninstalled.

## Upgrade

**How do I upgrade File Attender?**

Within the installation database there is an upgrade procedure that will guide you through the upgrade steps.

**Must I upgrade every server (replica) of File Attender?**

No. The upgrade only needs to be performed on one server, providing that the File Attender database can properly replicate to all other replicas.

**What happens to the File Attender data when I upgrade?**

Nothing. All of the data remains intact.

**Will I need to re-sign the agents after upgrading?**

No. When the File Attender agents were originally created, they were protected so that design refresh/replace would not affect them.

**What must I do to 'activate' the evaluation version?**

If you were using an evaluation version of File Attender and have purchased the product, you would be provided with a key to 'activate' the license.

**Do I lose my evaluation configuration data when I upgrade?**

No. All of the data remains intact.

**Configuration****Can I centrally administer File Attender?**

Yes, providing that File Attender is properly replicating to all servers that contain a replica.

## 4. Product features

Within File Attender, administrators create File Restrictions for the files that they want to manage. When the server agent runs, profile documents will be created within each mail database that are particular to that user. When the user opens the mail database with a Lotus Notes client, an agent will be copied/enabled within the personal names and address book. This agent will process the specified folders/files that were configured within the File Restrictions.

The administrators can specify that certain restrictions are only applicable to a subset of users, via groups, explicit user names or OU certification (e.g. \*/toys/acme). The same can also be done at the server level. Or, the administrators can create a global restriction for all users. Regardless, when the local agent runs, it will perform the specified configuration.

## File management

File Attender can be configured to manage the files using one of three methods. Multiple methods can be used on the same user.

### Methods

There are three different methods that can be used to locate a file.

#### Name

The administrators can either specify explicit files (e.g. snowman.exe) or leverage wildcards (e.g. \*.doc, \*.ppt). Multiple names can be used within the same File Restriction.

#### Retention

The administrators can specify how old a file must be before it is managed. The modification date of the file will be used to determine a file's age.

#### Size

The administrators can specify how large a file must be before it is managed.

### Actions

There are six different actions that can be used on a file.

#### Archive

The administrators can specify to move the files into a specified destination and leave a shortcut behind in place of the original file, to facilitate locating the file in its new location. The destination can be any device to which the user has 'write' rights.

#### Collect

The administrators can specify to simply collect information about the files.

#### Copy

The administrators can specify to make a copy of the file into the specified destination. The destination can be any device to which the user has 'write' rights.

#### Delete

The administrators can specify to permanently delete the files.

#### Move

The administrators can specify to move the files from the current location into a specified destination. The destination can be any device to which the user has 'write' rights.

#### Rename

The administrators can specify to rename the extension for the files.

Archive example

**FILE RESTRICTION**

**Archive files**

Basics | File | Servers | Users | Chronology

**Type**  Name  Retention  Size

**Action**  Archive  Collect  Copy  Delete  Move  Rename

**Retention type**  # of Days  Date range

**Retention amount** 90 days

**Location method**  Exclude  Include

**Locations** c:\\*  
[ComputerName](#) [EmployeeID](#) [FirstName](#) [FirstInitial](#) [MiddleInitial](#) [LastName](#) [NetworkName](#) [ShortName](#)  
[Lowercase](#) [Uppercase](#) [Nocase](#)

**Targets**  Servers  Users

Archive/Copy/Move | Name | Options

**Destination** f:\[ShortName]  
[ComputerName](#) [EmployeeID](#) [FirstName](#) [FirstInitial](#) [MiddleInitial](#) [LastName](#) [NetworkName](#) [ShortName](#)  
[Lowercase](#) [Uppercase](#) [Nocase](#)

**Shortcut description** Shortcut to '[FileName]'  
[DestinationFilePath](#) [FileName](#) [FilePath](#)

**Options**  Create folders  Overwrite

Archive/Copy/Move | Name | Options

**Names** \*.doc  
\*.xls

This restriction will archive all files with extensions of \*.doc and \*.ppt that were last modified at least 90 days ago into the f:\ folder for each user, by using the user short name as the folder name.

## Collect example

**FILE RESTRICTION**

**Collect files**

Basics | File | Servers | Users | Chronology

**Type**  Name  Retention  Size

**Action**  Archive  Collect  Copy  Delete  Move  Rename

**Retention type**  # of Days  Date range

**Retention amount**  days

**Location method**  Exclude  Include

**Locations**    
[ComputerName](#) [EmployeeID](#) [FirstName](#) [FirstInitial](#) [MiddleInitial](#) [LastName](#) [NetworkName](#) [ShortName](#)   
[Lowercase](#) [Uppercase](#) [Nocase](#)

**Targets**  Servers  Users

Size | Options

**Size**  mb

This restriction will collect information for all files that are at least 20 MB in size and were last modified at least 365 days ago.

### Copy example

**FILE RESTRICTION**

Copy files

Basics | File | Servers | Users | Chronology

**Type**  Name  Retention  Size

**Action**  Archive  Collect  Copy  Delete  Move  Rename

**Retention type**  # of Days  Date range

**Retention amount** 180 days

**Location method**  Exclude  Include

**Locations** c:\\*

[ComputerName](#) [EmployeeID](#) [FirstName](#) [FirstInitial](#) [MiddleInitial](#) [LastName](#) [NetworkName](#) [ShortName](#)

[Lowercase](#) [Uppercase](#) [Nocase](#)

**Targets**  Servers  Users

Archive/Copy/Move | Options

**Destination** m:\[ComputerName]


[ComputerName](#) [EmployeeID](#) [FirstName](#) [FirstInitial](#) [MiddleInitial](#) [LastName](#) [NetworkName](#) [ShortName](#)

[Lowercase](#) [Uppercase](#) [Nocase](#)

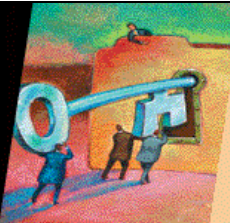
**Options**  Create folders  Overwrite

This restriction will copy all files that were last modified at least 180 days ago to the m:\ folder, for each user, by using the computer name as the folder name.

## Delete example



**FILE ATTENDER**  
FOR LOTUS NOTES



# FILE RESTRICTION

**Delete files**

[Basics](#) | [File](#) | [Servers](#) | [Users](#) | [Chronology](#)

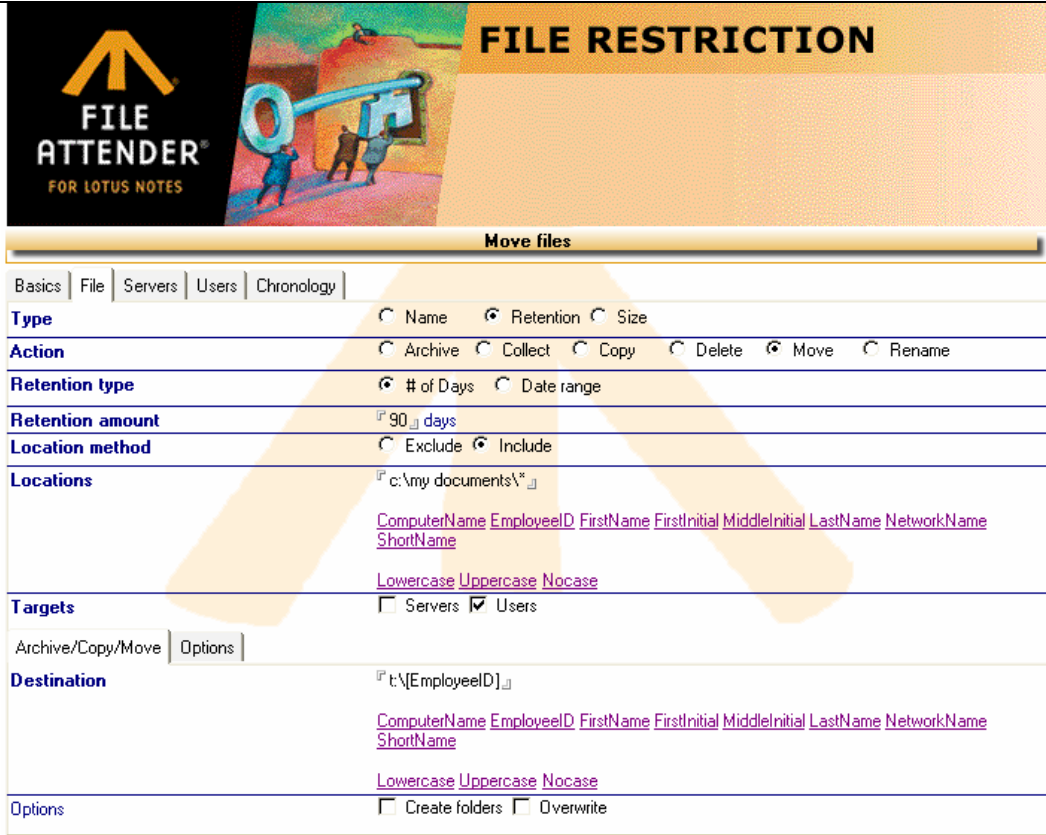
<b>Type</b>	<input type="radio"/> Name <input type="radio"/> Retention <input checked="" type="radio"/> Size
<b>Action</b>	<input type="radio"/> Archive <input type="radio"/> Collect <input type="radio"/> Copy <input checked="" type="radio"/> Delete <input type="radio"/> Move <input type="radio"/> Rename
<b>Retention type</b>	<input checked="" type="radio"/> # of Days <input type="radio"/> Date range
<b>Retention amount</b>	<input type="text" value="730"/> days
<b>Location method</b>	<input type="radio"/> Exclude <input checked="" type="radio"/> Include
<b>Locations</b>	<input type="text" value="c:\*"/>  <a href="#">ComputerName</a> <a href="#">EmployeeID</a> <a href="#">FirstName</a> <a href="#">FirstInitial</a> <a href="#">MiddleInitial</a> <a href="#">LastName</a> <a href="#">NetworkName</a> <a href="#">ShortName</a>  <a href="#">Lowercase</a> <a href="#">Uppercase</a> <a href="#">Nocase</a>
<b>Targets</b>	<input type="checkbox"/> Servers <input checked="" type="checkbox"/> Users

[Size](#) | [Options](#)

<b>Size</b>	<input type="text" value="10.00"/> mb
-------------	---------------------------------------

This restriction will delete all files that are at least 10 MB in size and were last modified at least 730 days ago.

### Move example



**FILE RESTRICTION**

**Move files**

Basics | File | Servers | Users | Chronology

**Type**  Name  Retention  Size

**Action**  Archive  Collect  Copy  Delete  Move  Rename

**Retention type**  # of Days  Date range

**Retention amount** 90 days

**Location method**  Exclude  Include

**Locations** c:\my documents\\*

[ComputerName](#) [EmployeeID](#) [FirstName](#) [FirstInitial](#) [MiddleInitial](#) [LastName](#) [NetworkName](#) [ShortName](#)

[Lowercase](#) [Uppercase](#) [Nocase](#)

**Targets**  Servers  Users

Archive/Copy/Move | Options

**Destination** t:\[EmployeeID]


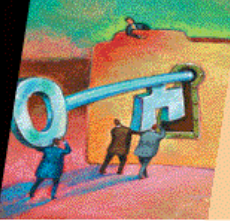
[ComputerName](#) [EmployeeID](#) [FirstName](#) [FirstInitial](#) [MiddleInitial](#) [LastName](#) [NetworkName](#) [ShortName](#)

[Lowercase](#) [Uppercase](#) [Nocase](#)

**Options**  Create folders  Overwrite

This restriction will move all files that were last modified at least 90 days ago into the t:\ folder for each user, by using the employee ID as the folder name.

## Rename example

# FILE RESTRICTION

**Rename files**

[Basics](#) | [File](#) | [Servers](#) | [Users](#) | [Chronology](#)

<b>Type</b>	<input checked="" type="radio"/> Name <input type="radio"/> Retention <input type="radio"/> Size
<b>Action</b>	<input type="radio"/> Archive <input type="radio"/> Collect <input type="radio"/> Copy <input type="radio"/> Delete <input type="radio"/> Move <input checked="" type="radio"/> Rename
<b>Retention type</b>	<input checked="" type="radio"/> # of Days <input type="radio"/> Date range
<b>Retention amount</b>	<input type="text" value="0"/> days
<b>Location method</b>	<input type="radio"/> Exclude <input checked="" type="radio"/> Include
<b>Locations</b>	<input type="text" value="c:\*"/>  <a href="#">ComputerName</a> <a href="#">EmployeeID</a> <a href="#">FirstName</a> <a href="#">FirstInitial</a> <a href="#">MiddleInitial</a> <a href="#">LastName</a> <a href="#">NetworkName</a> <a href="#">ShortName</a>  <a href="#">Lowercase</a> <a href="#">Uppercase</a> <a href="#">Nocase</a>
<b>Targets</b>	<input type="checkbox"/> Servers <input checked="" type="checkbox"/> Users

[Name](#) | [Rename](#) | [Options](#)

<b>Names</b>	<input type="text" value="*.piz"/>
--------------	------------------------------------

[Name](#) | [Rename](#) | [Options](#)

<b>Extension</b>	<input type="text" value=".zip"/>
------------------	-----------------------------------

This restriction will rename all files with the extension \*.piz (regardless of age) to a .zip extension.

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October 2007

## Reporting

File Attender provides a list of files that are managed for each user and/or server. Included will be the file name, location, destination (if applicable), size, last modified date/time, requested action and status. This will provide an audit trail of all file activity performed by File Attender. This information can be viewed per user/server, or the list of managed files can be viewed collectively for all users/servers.

In addition, File Attender will provide the logs if an error occurs either while deploying the local agent or while the local agent is running.



## **5. Summary**

File Attender is a product that can help reduce your exposure today. Legal implications regarding files can be a serious problem within any company.

File Attender can help manage the files of which you are aware, but can also make you aware of files that you had no idea existed. File Attender can also be used to centralize information (copy to a network drive) for which multiple files have a common theme.

Regardless of what files are concerning you, File Attender can address your issues!



## 6. Contact information

If you need additional information regarding File Attender, please contact the following:

### Sales contact

#### Theresa Zajacs

800-255-5155 x208

412-206-0005 x208

412-206-0018 (FAX)

[tzajacs@sherpasoftware.com](mailto:tzajacs@sherpasoftware.com)

### Technical contact

#### Jeff Tujetsch

800-255-5155 x206

412-206-0005 x206

412-206-0018 (FAX)

[jtujetsch@sherpasoftware.com](mailto:jtujetsch@sherpasoftware.com)