Exactly: User Guide

Exactly is used to safely transfer your files in strict accordance with digital preservation best practices.

Before you get started with Exactly, have you discussed with the archive (or other receiving entity) their preferred mode of transfer? Exactly can transfer files in a variety of ways, you should first identify how the archive wants their files delivered. Exactly's primary modes for remote deliver (at this time) include FTP and utilizing synchronized file service such as DropBox or Google Drive.

Additionally, check with the archive as to whether they have a preset configuration that they want you to import following the installation of Exactly. This can make things even easier for you.

Note, you must have Java installed on your computer in order to use Exactly. Download Java here: https://www.java.com/en/download/

Installing Exactly

Exactly can be installed as a Mac OS Build (application file), a Windows executable file (.exe), or as a Java package (.jar). Download links for each option can be found on the cover page of this user guide above.

Mac OS Build

Once unzipped, the Mac OS package can be moved to your applications folder. Opening the Exactly folder, you will see an Exactly application file. Simply open the application file and it will run as any application runs on your Mac. *If it is your first time opening the application, right click on the application file and choose "Open." The pop-up will ask you if you are sure you want to open the application. Choose "yes."

Windows Executable

Once unzipped, the Windows Executable (.exe) can be opened from anywhere you choose to store the file. Every time you open the application it will ask you if it is alright to install the application on your computer. Because this is a java application, Exactly comes complete with the necessary java files to run on your Windows machine. Exactly will install those files in a local temp area while the application is running.

Java Package

When you download and unzip the Java version of Exactly, the executable files, as well as the log files, are stored within the parent directory.

Name	^	Date Modified
📄 exactly.jar		Oct 26, 2015, 7:46 AM
▶ 📁 lib		Nov 2, 2015, 9:59 PM

F

Name	^	Kind	Size
📄 derby.log		Log File	684 bytes
📄 exactly.jar		Java archive	325 KB
▶ 📁 lib		Folder	15.5 MB
📄 logfile.txt		text	Zero bytes
📄 logfile.txt.lck		Document	Zero bytes
▶ 📁 ukexactly		Folder	2 MB

1. Unzip the downloaded file
2. Move the contents of the directory to a specified location on your local computer.

Note: Exactly will not work if the application files are placed on a networked drive, the contents of the application folder must reside on the local computer HDD.
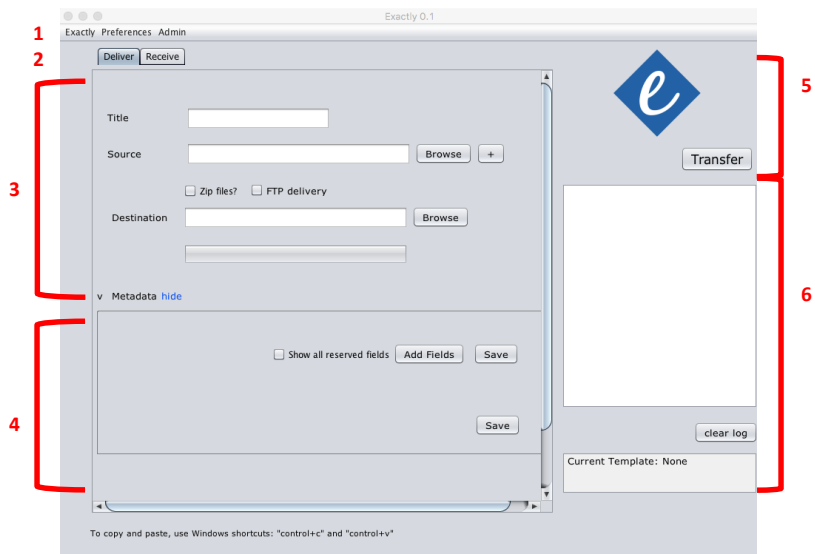
Opening Exactly

1. Double click on the **exactly.jar** file

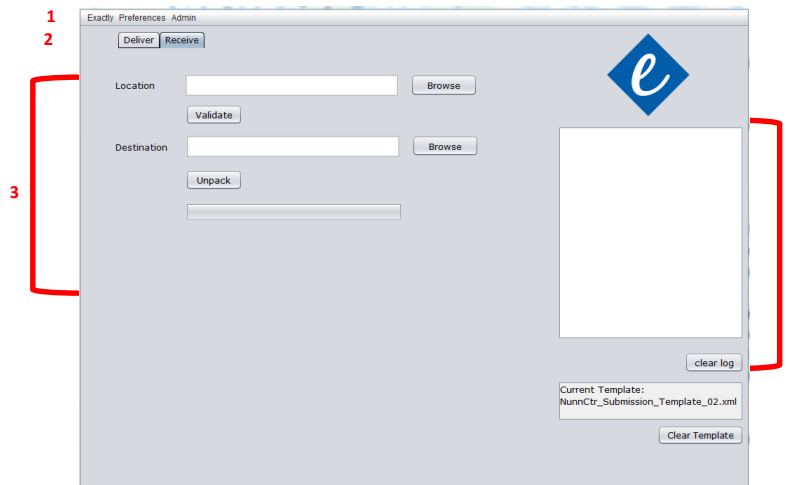2. The application will open. The default view for Exactly is called the *Transfer Center*.
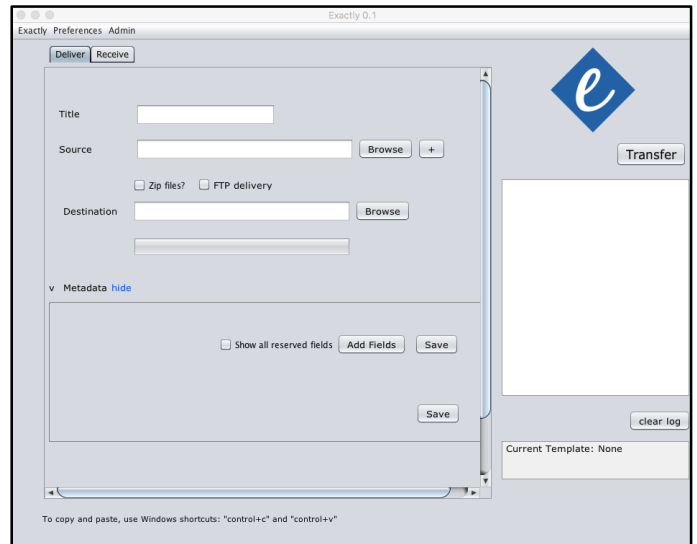
Tour of Exactly (Deliver)

1. Settings
2. Function Tabs
3. Package Quad
4. Metadata Quad
5. Transfer Quad
6. Logging Quad

Tour of Exactly (Receive)

1. Settings
2. Function Tabs
3. Package Quad
4. Logging Quad

Menu: Exactly

Export: This function will allow the receiving entity to export preset templates in the form of a simple xml file. This xml file can contain presets for:

- Metadata fields (both labels and values)
- FTP configuration settings
- Email notification configuration settings

Import: This function will allow you to Import preset configuration settings provided by the archive or receiving entity. This feature will only import xml files exported by Exactly.
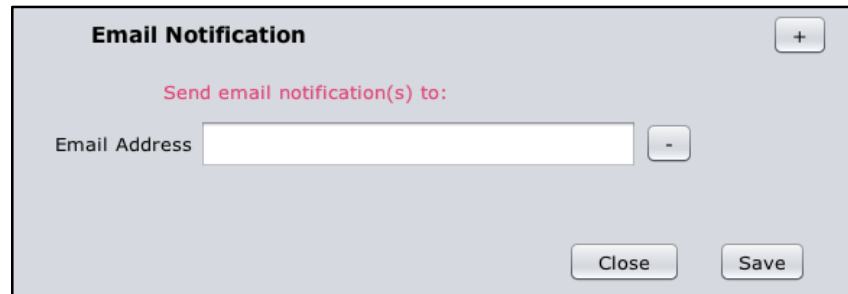
Menu: Preferences

Email Notifications

Add email addresses if you want to receive notifications of successful transfer**.**
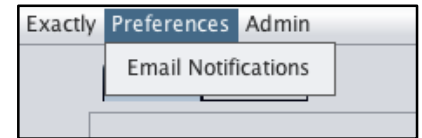
Press the [+] Button to add an email address.
Click "Save" to save address.

If email notifications are enabled, you will receive notification at the specified address when the package has transferred successfully. If you are the delivering entity, you will not need to access the Admin Menu, unless the archive or receiving entity has specified that you enter those settings manually, or you are an advanced user.

Menu: Admin

Administrative settings should be created by the receiving entity and included in preset configurations. If the receiving entity has not provided settings in the preset configurations, see below.

Email Settings

Enter in email "send" settings in order for email notifications to be sent. Consult your email provider for appropriate settings for sending email.

The "Email Notifications" checkbox must be enabled in order for notifications to be automatically sent by Exactly.
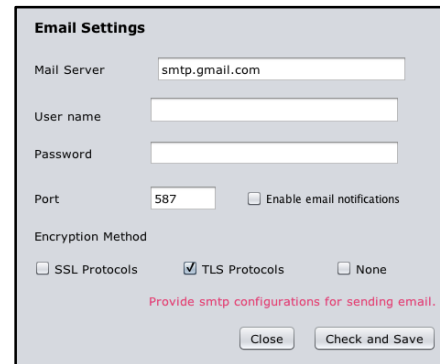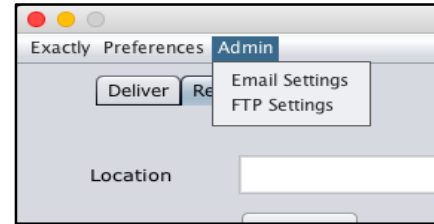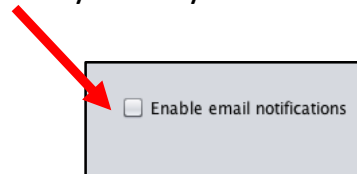
You may have to adjust your security settings on your email account (for example with Gmail) in order to allow third party applications to send email on your behalf.

FTP Settings

If FTP transfer will be utilized, FTP settings should be obtained or imported from the receiving entity.

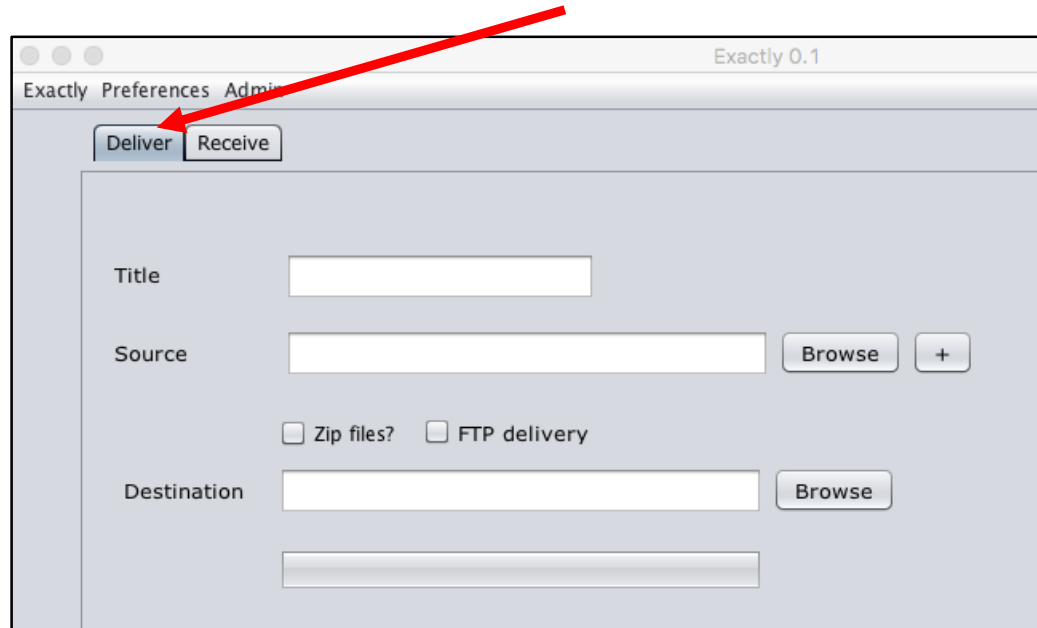*Note: FTP delivery requires validated settings in order to work.
Additionally, "FTP Delivery" must be checked in the Package Quad of the Transfer Center in order for FTP delivery to take place.
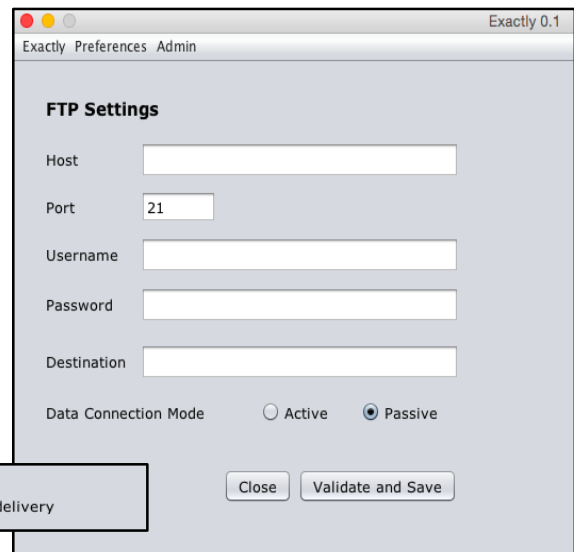
Package Delivery

Here is where you will provide basic package delivery information (required) in order to successfully transfer your files. Consult with the archive or other receiving entity on appropriate conventions and destinations.

First, make sure that you have selected the "Deliver" tab.

1. **Title**
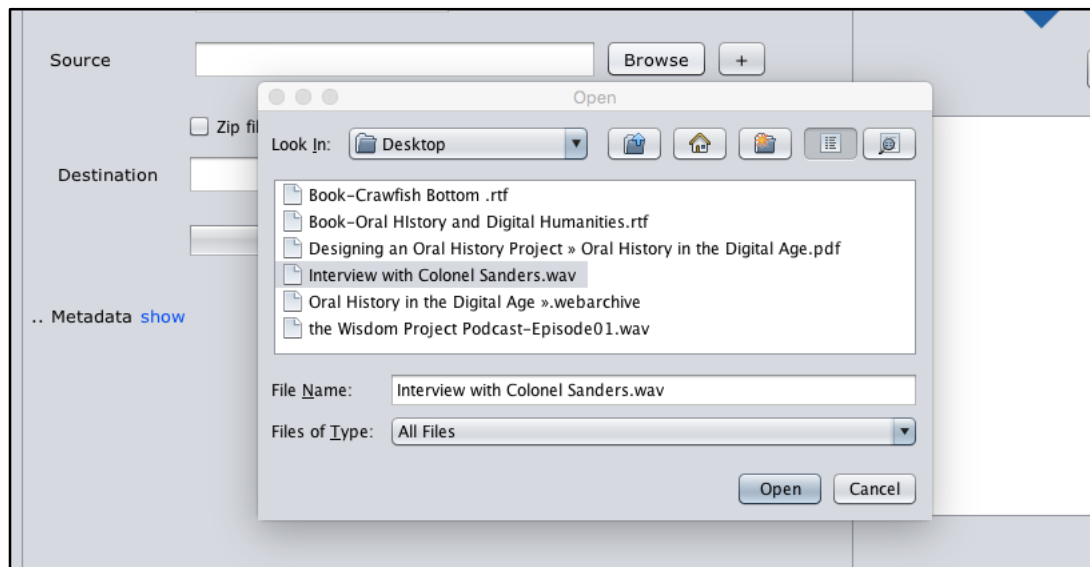   You must provide a title for your package.
   - Example: *Interview with Colonel Harland Sanders*

2. Source

Locate the file that you would like to transfer by clicking "Browse.".


Navigate to the appropriate folder on the local hard drive and select the file. Add addition sources by clicking on the [+] button

The archive or receiving entity may prefer for this source to be the original version of a file, which may exist on an SD card (if possible).

3. Zip File or FTP

If the receiving entity has specified FTP as the preferred mode of delivery, and has provided the appropriate settings in the Admin settings, make sure the FTP delivery is checked.
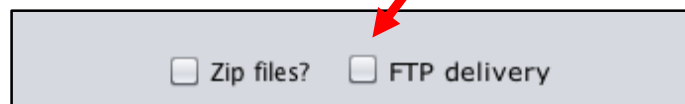
The receiving entity will specify whether you should Zip your files or not.

4. Destination

Whether you are utilizing FTP or a synchronized folder (using something such as DropBox), there must be a *local* destination identified for the package that you create. Choose your Destination by selecting "Browse" and navigating to your preferred local destination.
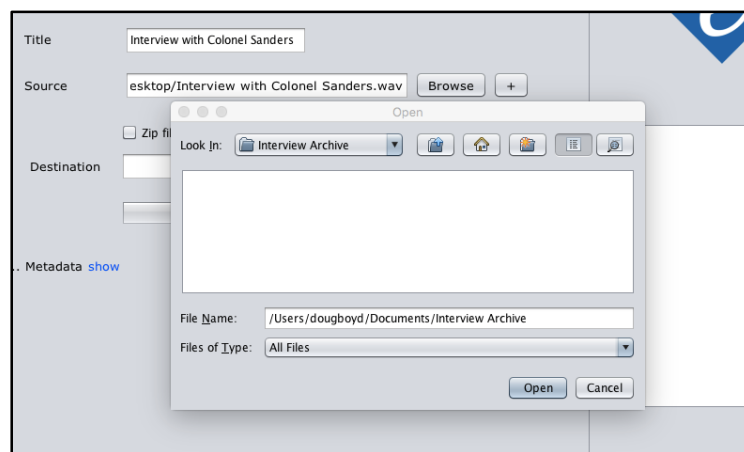

FTP

If you are utilizing FTP to transfer your package, see step Package Delivery step #3 above, however, you must, also, include a local destination which can serve as your backup package residing on a specified location on your local drive.

Cloud-Based Synchronized Folder (Dropbox or Google Drive)

If you are using a cloud-based, synchronized folder (such as DropBox or Google Drive) you must:

1. have a Dropbox or Google Drive account.
2. Have Dropbox or Google Drive installed on your local computer.
3. For Dropbox, you must have the storage quota associated with your account in order to store your files.

Select "Browse" to choose the local instance of your synchronized folder as your destination.

Once your package delivery settings are completed, you are ready to proceed with entering appropriate metadata for the package.
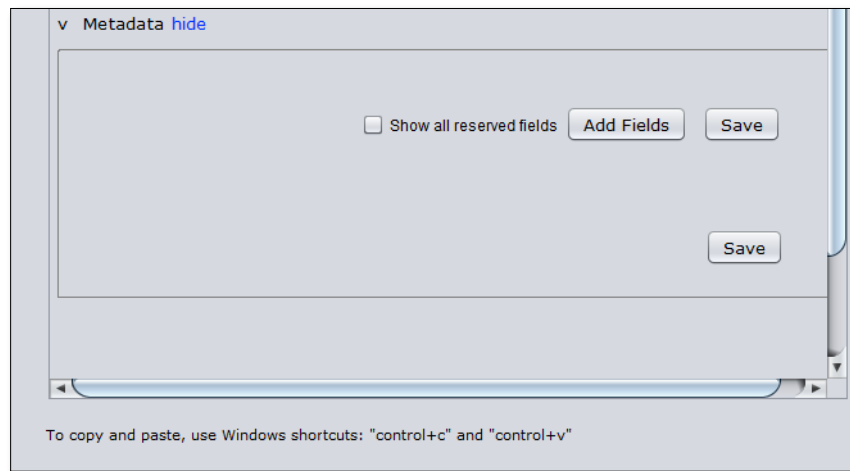
Metadata Input

Here is where you will enter descriptive information about the contents of your package. Typically, the fields you will be asked to fill out will be specified by the receiving entity or included in the present configurations you have been asked to import. If you are importing preset configuration settings that contain metadata fields, return to the *Menu: Exactly* section of this tutorial.
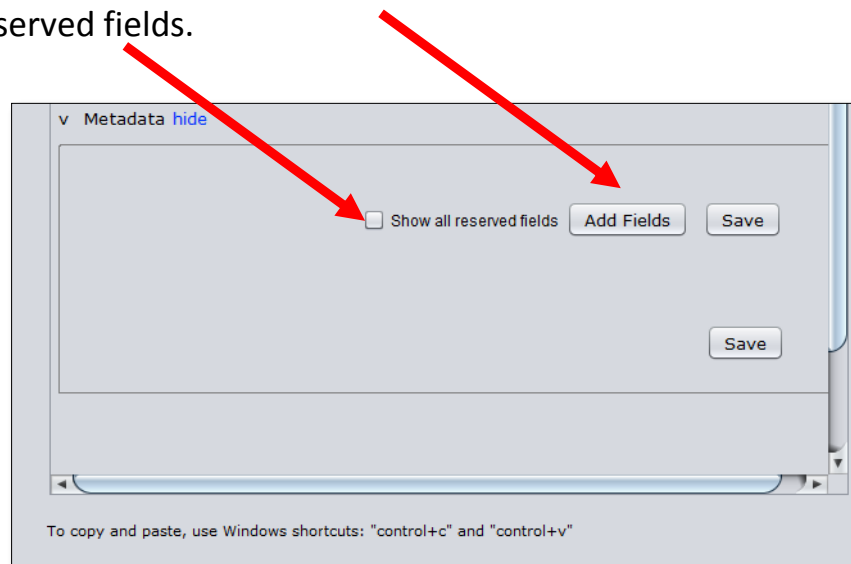
1. When you first open Exactly, if the metadata quad is closed, click on "show" to view the metadata quad.
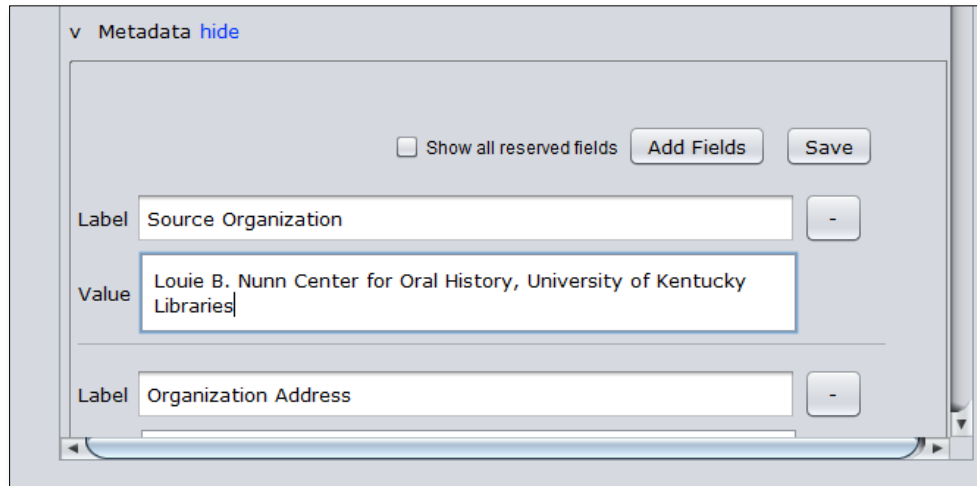
2. If no preset settings file has been imported, the metadata quad will not show any fields.

3. You can create your own fields, or you can choose the "Bag-It'," reserved fields.


4. Metadata fields contain both a "label" and a "value."
   a. **Labels** are used to identify the field.
   b. **Values** are the contents of the field.
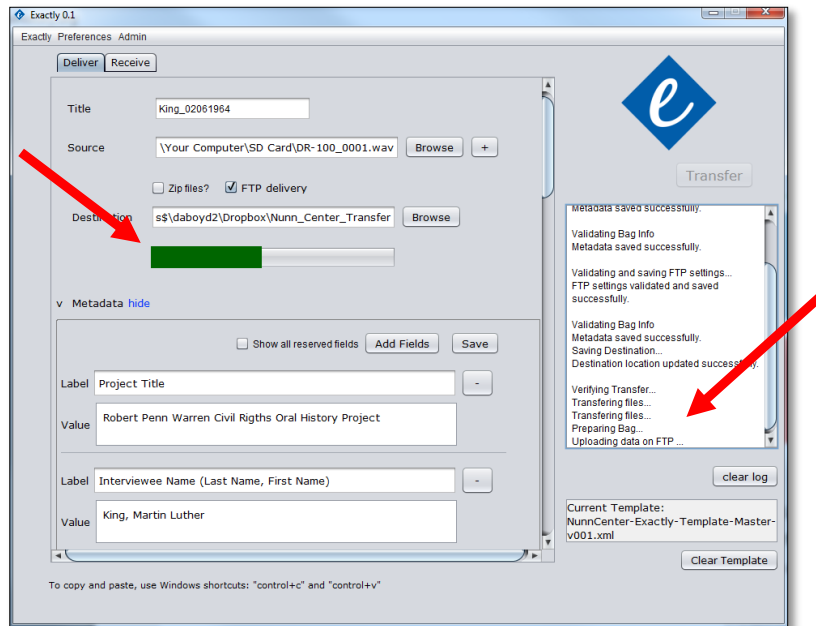
5. **Save**: You must save your metadata prior to submitting your package.
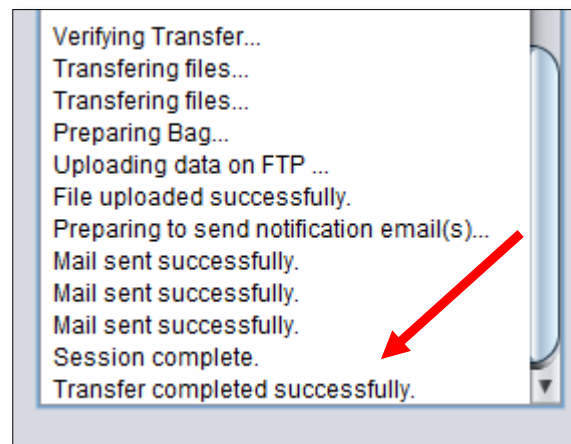
Transferring Files

Using Exactly to transfer files is easy. Once you have the application configured, and your metadata complete, all you have to do is to press the "transfer" button in the transfer quad (upper right).
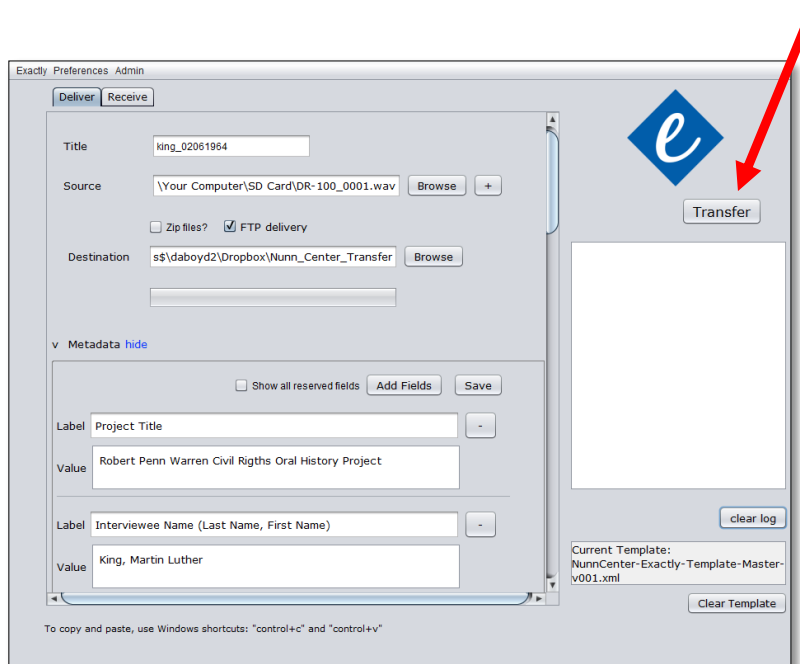
The status bar and log will tell you the status of your transfer.

When your transfer completed, the log will indicated "transfer completed successfully."

If you have email notifications configured and enabled and your email address was added to the notification list, you should promptly receive an email indicating the successful transfer. Remember, if you are using FTP transfer, this indicates successful transfer to the remote site, if you are using file synchronization tools (such as Dropbox or Google Drive) the email message only indicates successful transfer to your *local* destination. The file will still need to synchronize to your shared folder in the cloud before it is truly ready to be received by the receiving institution.
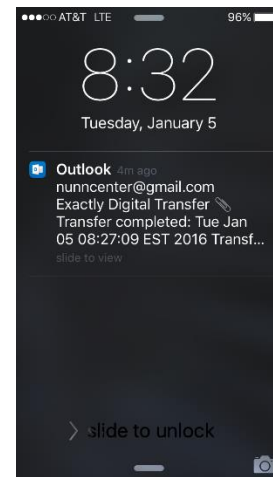
Transfer Readiness Checklist:

1. **Package-Level Metadata**: Have you entered the appropriate package-level metadata? Title? Have you chosen the source file and identified your local destination?

2. **Preset Configuration Template**: If the receiving institution has provided a preset settings configuration file, have you imported your preset?

3. **Mode of Transfer:** Have you identified how you will be transferring file(s)? Dropbox? FTP?

4. **Email Alerts:** Have you entered your email so you will receive email notifications? *Preferences—Email Notifications*

5. **Metadata:** Fill out the metadata values fields. Don't forget to <u>save your metadata</u> prior to transfer. If you have questions about how to input your values into the fields, contact the receiving institution.
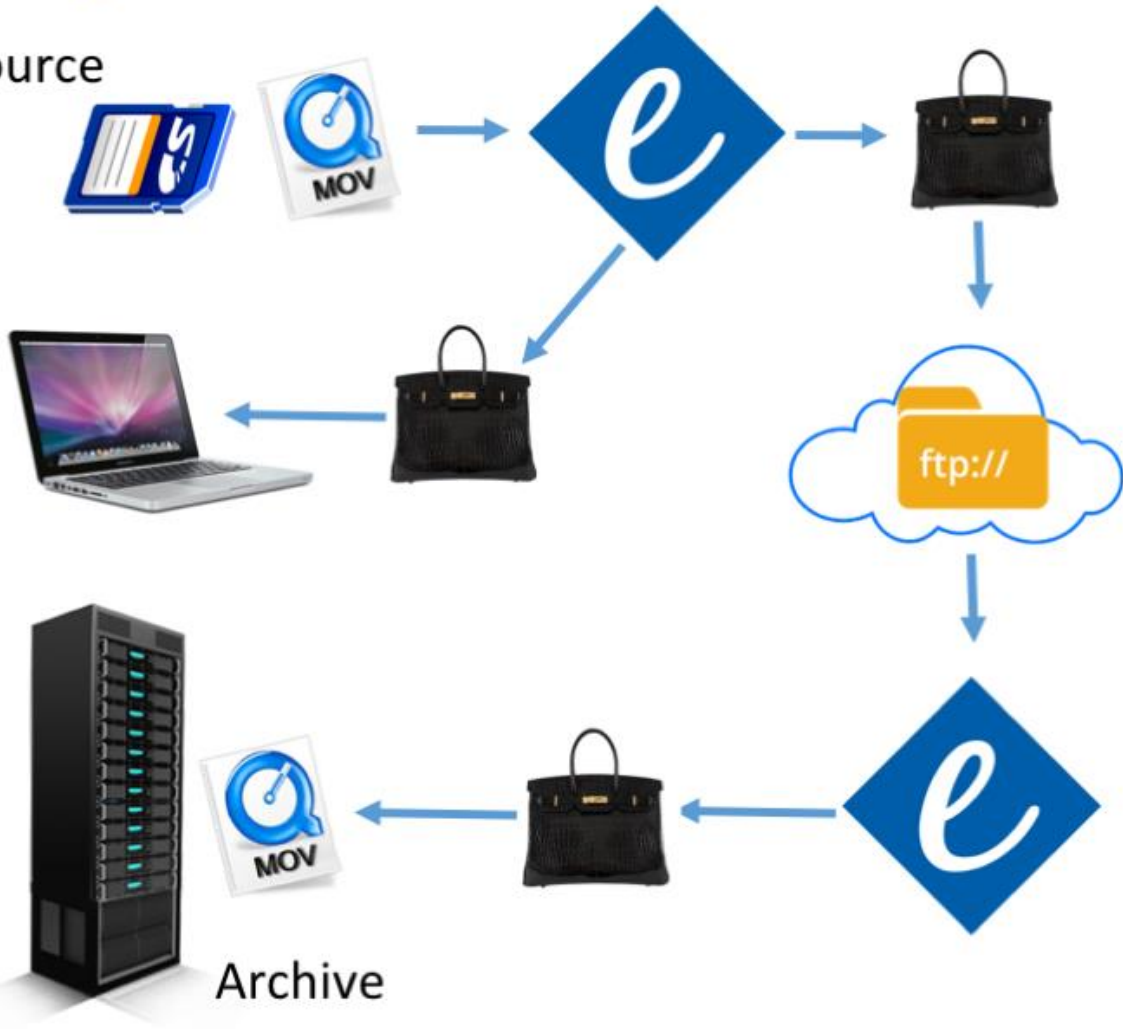
6. **Transfer:** If you have confirmed that you are ready for transfer, press the transfer button located in the transfer quad. Do not turn off your computer, log off, or allow your computer to enter into sleep or hibernation mode while your transfer is occurring.

5. **Confirm:** Confirm that your transfer has completed successfully. If you were supposed to receive an email, did you receive that email? (If working with a file synchronization service, ensure that your package has synchronized to the cloud as well). Always best to reach out to the receiving institution to confirm the transfer.
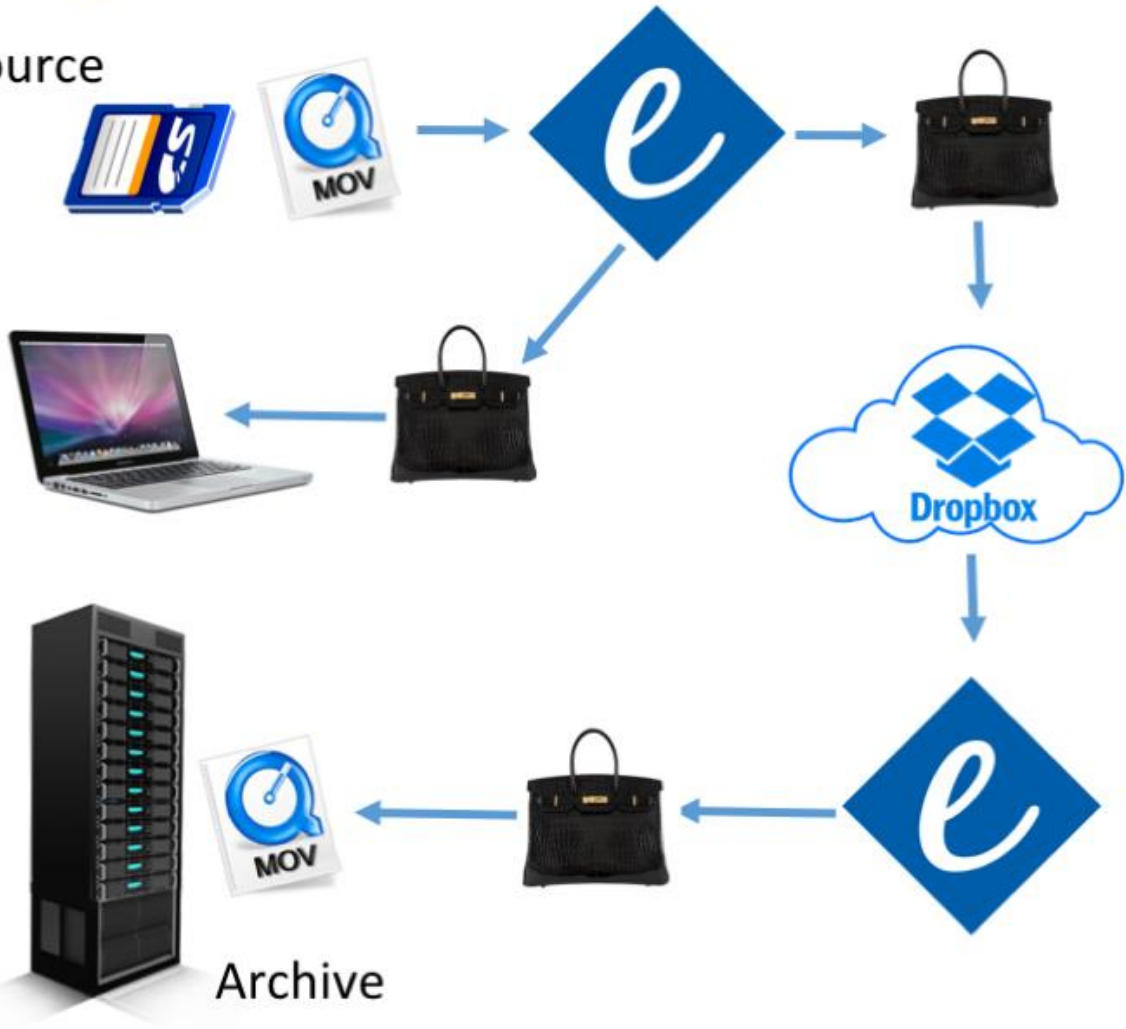
Exactly Transfer Workflow

Source

Archive

Exactly Transfer Workflow

Source

Archive