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: <u>https://www.java.com/en/download/</u>

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	
	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*.

Exactly 0.1	
xactly Preferences Admin	
Deliver	
Title Browse +	Transfer
Zip files? FTP delivery Destination Browse Browse Browse Browse Browse Browse Browse Browse Brow	
Metadata hide Show all reserved fields Add Fields Save	
Save	Current Template: None
To copy and paste, use Windows shortcuts: "control+c" and "control+v"	

Tour of Exactly (Deliver)

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

Exactly Prefe	Exactly 0.1	
2 Deliv	er Receive	
Titl		T
Sou	Browse + Transfer	
	Zip files? FTP delivery	٦
De	Browse	T
v Me	tadata hide	
	Show all reserved fields Add Fields Save	T
	Save	
	Current Template: None	T
	Ļ	
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То сору	and paste, use Windows shortcuts: "control+c" and "control+v"	

Tour of Exactly (Receive)

1 Exactly Prefere 2 Deliver Receive 1. Settings Browse Location 2. Function Tabs Validate 3. Package Quad Browse Destination 4. Logging Quad Unpack 3 clear log Current Template: NunnCtr_Submission_Template_02.xml Clear Template

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.

Exactly	Preferences	Admin	
	Email Notif	ications	

Press the 🕒 Button to add an email address. Click "Save" to save address.

Email Not	Email Notification		
Send	d email notification(s) to:		
Email Address		-	
		Close	Save

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.

Enable email notifications

Exactly Preferences	Admin
Deliver	Email Settings FTP Settings
Location	

Email Settings		
Mail Server	smtp.gmail.com	
User name		
Password		
Port	587 Enable en	nail notifications
Encryption Method		
SSL Protocols	✓ TLS Protocols	None
	Provide smtp configurations	for sending email.
	Close	Check and Save

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.	Constant Stress Admin FTP Settings Host	Exactly 0.1
*Note: FTP delivery requires validated	Port 21	
settings in order to work.	Username	
Additionally, "FTP Delivery" must be	Password	
checked in the Package Quad of the	Destination	
Transfer Center in order for FTP		
delivery to take place.	Data Connection Mode 🛛 Active 💿 Passive	
Zip files? FTP de	Close Validate and Save	

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.

				Exa	ctly 0.1
Exactly	Preferences Admi	10			
	Deliver Receive				
	Title				
	Source				Browse +
		Zip files?	EFTP deliver	ry	
	Destination				Browse

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

Source	Browse + Open
Destination	p fil Look In: Desktop Book-Crawfish Bottom .rtf Book-Oral History and Digital Humanities.rtf Designing an Oral History Project » Oral History in the Digital Age.pdf
Metadata show	Interview with Colonel Sanders.wav Oral History in the Digital Age ».webarchive the Wisdom Project Podcast-Episode01.wav
	File Name: Interview with Colonel Sanders.wav Files of Type: All Files Open Cancel

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.

] Zip files?	FTP delivery

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.

Title	Interview with Colonel Sanders
Source	esktop/Interview with Colonel Sanders.wav Browse +
Destination	Open Zip fil Look In: Interview Archive
Metadata show	File Name: /Users/dougboyd/Documents/Interview Archive Files of Type: All Files
	Open Cancel

Title	Interview with Colonel Sanders
Source	esktop/Interview with Colonel Sanders.wav Browse +
	☐ Zip files? ☑ FTP delivery
Destination	rs/dougboyd/Documents/Interview Archive Browse

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.

v Metadata hide		
	Show all reserved fields Add Fields	Save
		Save
4		<u></u>
To copy and paste, use Windows sh	nortcuts: "control+c" and "control+v"	

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.

v Meta	adata hide
	Show all reserved fields Add Fields Save
Label	Source Organization -
Value	Louie B. Nunn Center for Oral History, University of Kentucky Libraries
Label	Organization Address -

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).

Delive	r Receive	
Title	king_02061964	e,
Sour	Your Computer\SD Card\DR-100_0001.wav Browse +	
	□ Zip files? ☑ FTP delivery	Transfer
Dest	ination s\$\daboyd2\Dropbox\Nunn_Center_Transfer Browse	
v Met	adata hide Show all reserved fields Add Fields Save	
Label	Project Title	
Value	Robert Penn Warren Civil Rigths Oral History Project	
Label	Interviewee Name (Last Name, First Name)	clear
Value	King, Martin Luther	Current Template: NunnCenter-Exactly-Template-Ma v001.xml
-	7.	Clear Temp

·	r Receive	
Title	King_02061964	
Source	\Your Computer\SD Card\DR-100_0001.wav Browse +	
	Zipfiles? SFTP delivery	Transfer
Desi	the tion s\$\daboyd2\Dropbox\Nunn_Center_Transfer Browse	Metadata saved successfully.
		Validating Bag Info Metadata saved successfully.
		Validating and saving FTP settings FTP settings validated and saved
v Met	adata hide	successfully.
	Show all reserved fields Add Fields Save	Validating Bag Info Metadata saved successfully. Saving Destination Destination location updated succession.
Label	Project Title -	Verifying Transfer
Value	Robert Penn Warren Civil Rigths Oral History Project	Transfering files Preparing Bag Uploading data on FTP
Label	Interviewee Name (Last Name, First Name)	clear log
Value	King, Martin Luther	Current Template: NunnCenter-Exactly-Template-Master v001.xml
		Clear Template

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.



