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Exactly Quickstart Guide

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Contact information

AVP

<http://www.weareavp.com/>

GitHub repository

<https://github.com/WeAreAVP/uk-exactly>

Download pages for application

Windows: <https://www.weareavp.com/wp-content/uploads/2018/04/Exactly-Win.zip>

sha256 (.exe) : 9d48330b112798c8c714b151e459aa4572e1cf5f2f3a2528b944454625dccabf

Mac: <https://www.weareavp.com/wp-content/uploads/2018/04/Exactly-macOS.zip>

sha256 (.dmg) : 8a10407cb5de61bdfaa5402c12c8525fc2754dfa8ed1e5a0a58670edf5b6f1db

About Exactly



Exactly is used to safely transfer your files in strict accordance with digital preservation best practices. This quickstart guide is intended for partners of organizations using Exactly for digital deposit, who want to transfer content to these organizations.

Exactly can transfer files in a variety of ways, so you should first identify how the archive you are working with wants their files delivered. Exactly's primary modes for remote delivery (at this time) include FTP, SFTP, and utilizing a 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.

If you want to know about functionalities and documentation not covered in this guide, please read the full user guide, available for download here: www.weareavp.com/products/exactly

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Installing Exactly

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



NOTES

- You must have Java installed on your computer in order to use Exactly. Download Java here: <https://www.java.com/en/download/>
- 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.

Mac OS Build

Once unzipped, double-click on the Exactly.dmg file. In the new window that appears, drag and drop the Exactly icon to the Applications folder. Close the window. Exactly can now be opened from your Launchpad, or from the Applications folder in your Finder.

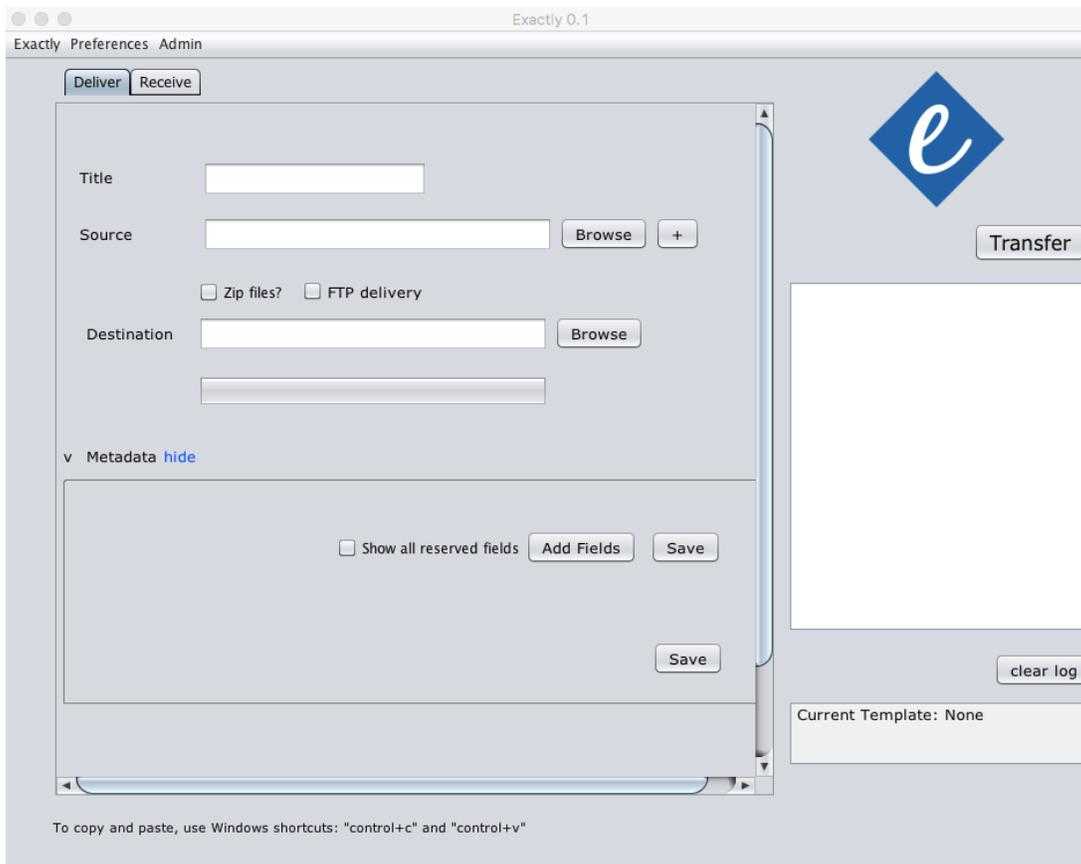
Next, simply open the application file and it will run as any application runs on your Mac. If it is your first time opening the application your machine will ask for confirmation to launch it. You can either right-click on the application file and choose "Open" or just double-click on the executable file. A pop-up will ask you if you are sure you want to open the application. Choose "Open."

Windows Executable

Once unzipped, the Windows Executable (.exe) can be opened from anywhere you choose to store the file. 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. If it is your first time opening the application your machine will ask confirmation to launch it. In the pop-up warning message, select "Run anyway."

Opening Exactly

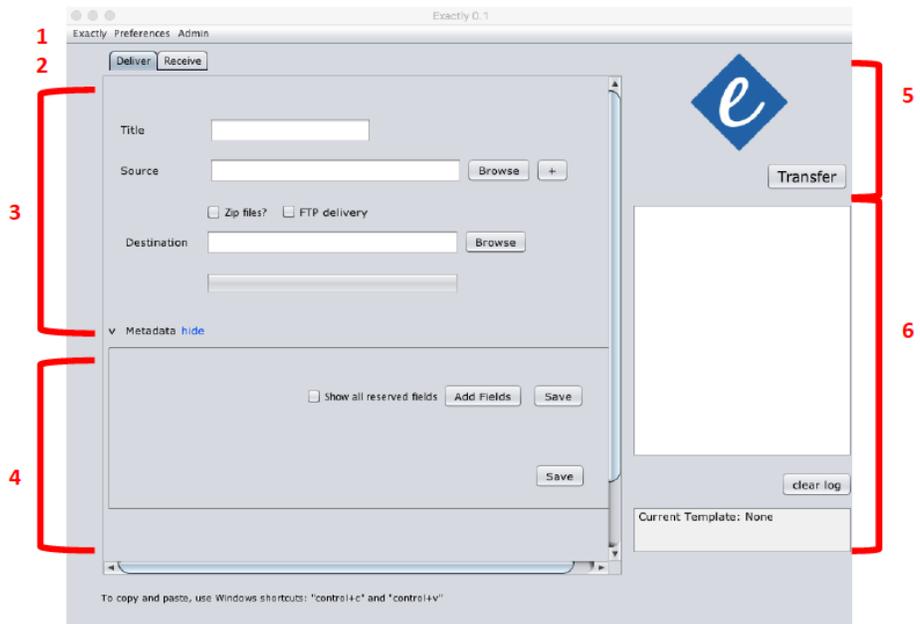
1. Double click on the Exactly icon, located:
 - In your Launchpad or Applications folder in Mac.
 - In the folder where you located the .exe file once you unzipped the download package.
2. The application will open. The default view for Exactly is called the [Deliver Tab](#).



Tour of Exactly (Deliver)

The “Deliver Tab” allows the user to set up and initiate transfers. This tab contains four sections or “quads,” as seen in the image to the right.

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

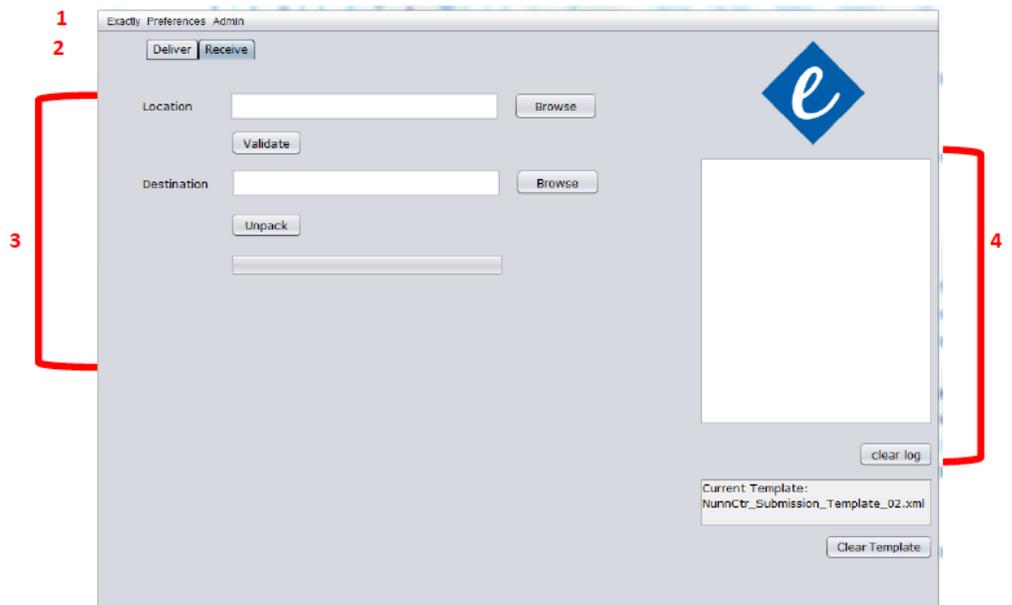


Tour of Exactly (Receive)

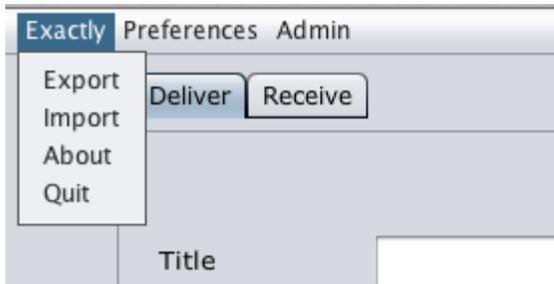
The main section of the “Receive tab” gives the recipient an opportunity to verify packages as well as to unpack them in order to move the contents out of the BagIt structure and to a designated location.

The Receive Tab contains two quads:

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



Exactly Main Menu



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

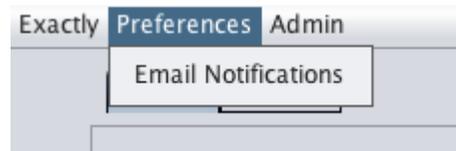
Import

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 another instance of Exactly.

Preferences Menu

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.

A screenshot of the 'Email Notification' dialog box. The title bar says 'Email Notification' and has a '+' button in the top right corner. Below the title bar, there is a red label 'Send email notification(s) to:'. Underneath, there is a text input field labeled 'Email Address' with a '-' button to its right. At the bottom of the dialog, there are two buttons: 'Close' and '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).

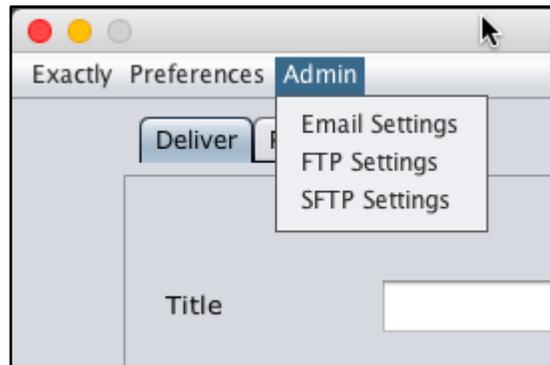
Admin Menu

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. You may need to consult your email provider for appropriate settings for sending email from the application.

The “Email Notifications” checkbox must be enabled in order for notifications to be automatically sent by Exactly.

A screenshot of the 'Email Settings' dialog box. It contains the following fields and options:

- Mail Server:** smtp.gmail.com
- User name:** (empty)
- Password:** (empty)
- Port:** 587
- Enable email notifications:**
- Encryption Method:** SSL Protocols, TLS Protocols, None
- Footer:** Provide smtp configurations for sending email.
- Buttons:** 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.



 **NOTE**

FTP delivery requires validated settings in order to work. Additionally, "FTP Delivery" must be checked in the Package Quad of the Deliver Tab in order for FTP delivery to take place. See "Tour of Exactly (Deliver)" for more details.



The screenshot shows a horizontal row of three checkboxes: 'Zip files?', 'FTP delivery', and 'SFTP delivery'. The 'FTP delivery' checkbox is checked, and a red arrow points to it from the text above.

SFTP Settings

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



Exactly Preferences Admin

SFTP Settings

Host

Port

Destination

Connect Using

Username

Password



NOTE

SFTP delivery requires validated settings in order to work. Additionally, "SFTP Delivery" must be checked in the Package Quad of the Deliver Tab in order for SFTP delivery to take place. See "Tour of Exactly (Deliver)" for more details.

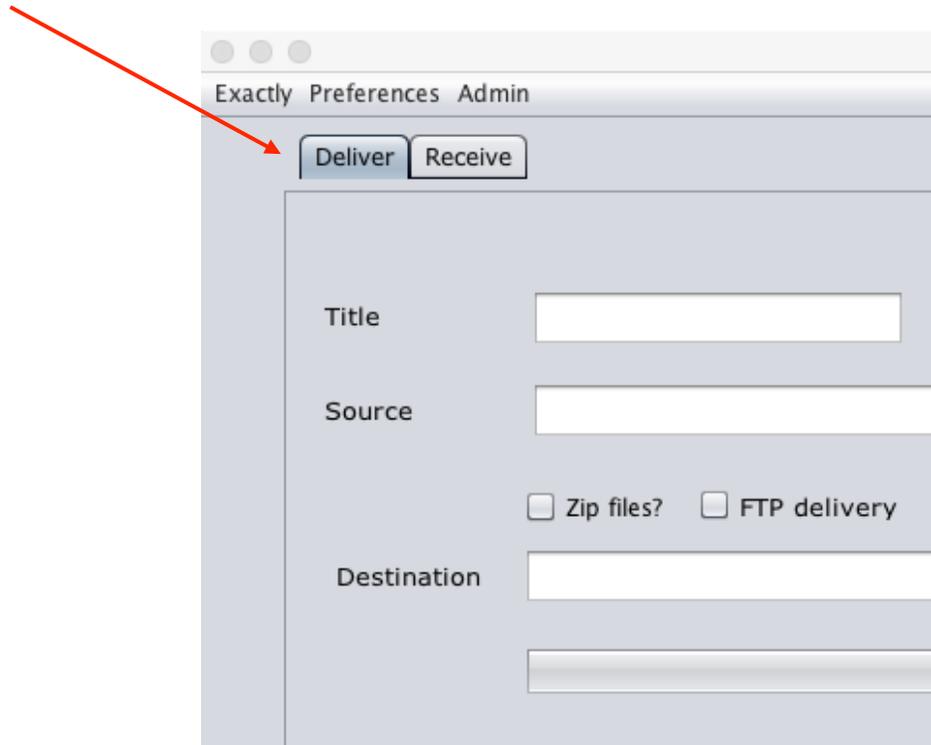


Zip files? FTP delivery SFTP delivery

Package Delivery

Here is where you will provide basic (required) package delivery information or package-level metadata 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.

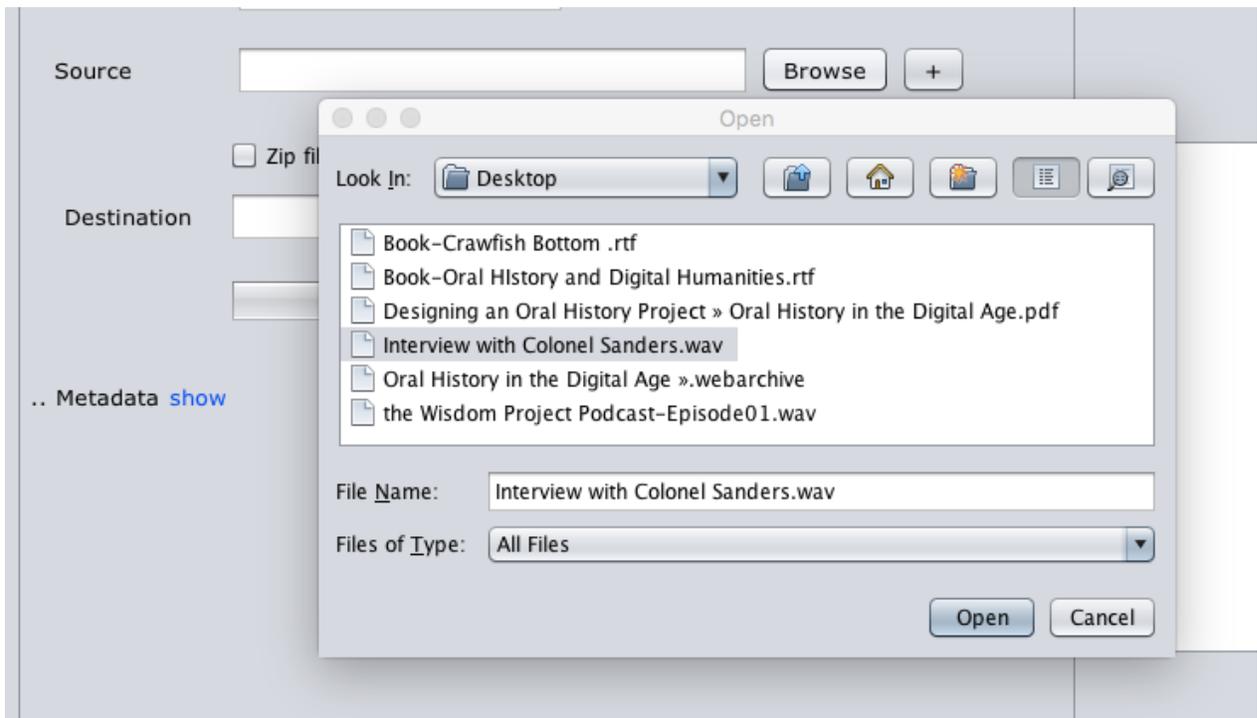
Example: Interview with Colonel Harland Sanders

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 additional sources by clicking on 



The archive or receiving entity may prefer that you select as the source the original version of a file (if possible), which may exist on different locations such as your local computer, a thumb drive, or an SD card.

3. Zip File, FTP, or SFTP

If the receiving entity has specified FTP or SFTP as the preferred mode of delivery, and has provided the appropriate information in the Admin settings, make sure the FTP or SFTP delivery is checked.

The receiving entity will specify whether you should check the first box in order to allow Exactly to Zip your files.



4. Destination

Whether you are utilizing FTP, SFTP, or a synchronized folder (using an application such as DropBox), it is required to indicate a local destination in your local machine for the package that you create. A copy of the bag will also be saved in this location. Choose your destination by selecting “Browse” and navigating to your preferred local destination. This will serve as a backup for your delivery.



FTP or SFTP

If you are utilizing FTP or SFTP to transfer your package (see Package Delivery step #3 above), keep in mind that you must also include a local destination on a specified location on your local drive that can serve as your backup package.

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 [enough storage space 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.

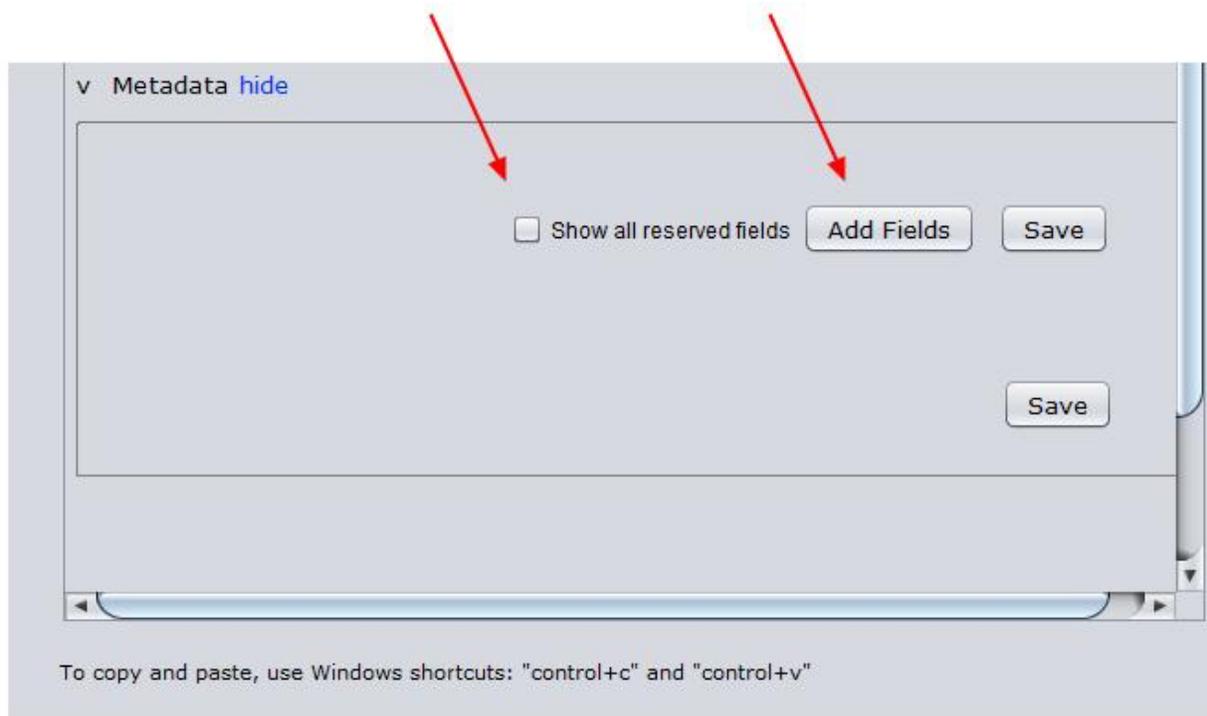
1. When you first open Exactly, if the [Metadata Quad](#) is closed, click on "show" to view the metadata quad.



2. If no preset settings file has been imported, the metadata quad will not show any fields.

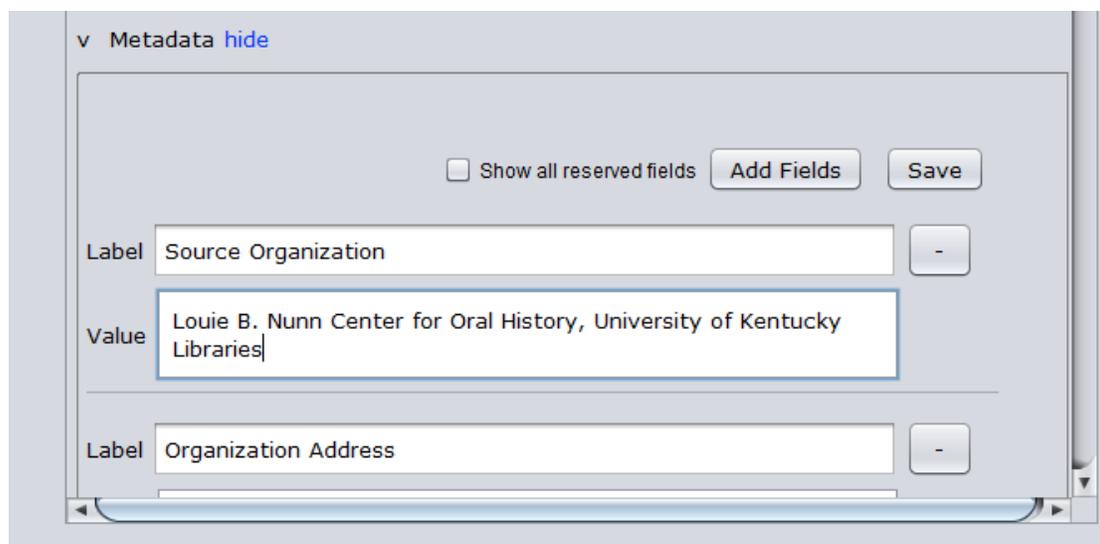


3. You can choose the “Bag-It” reserved fields, or you can create your own fields.



4. Metadata fields contain both a “label” and a “value.”

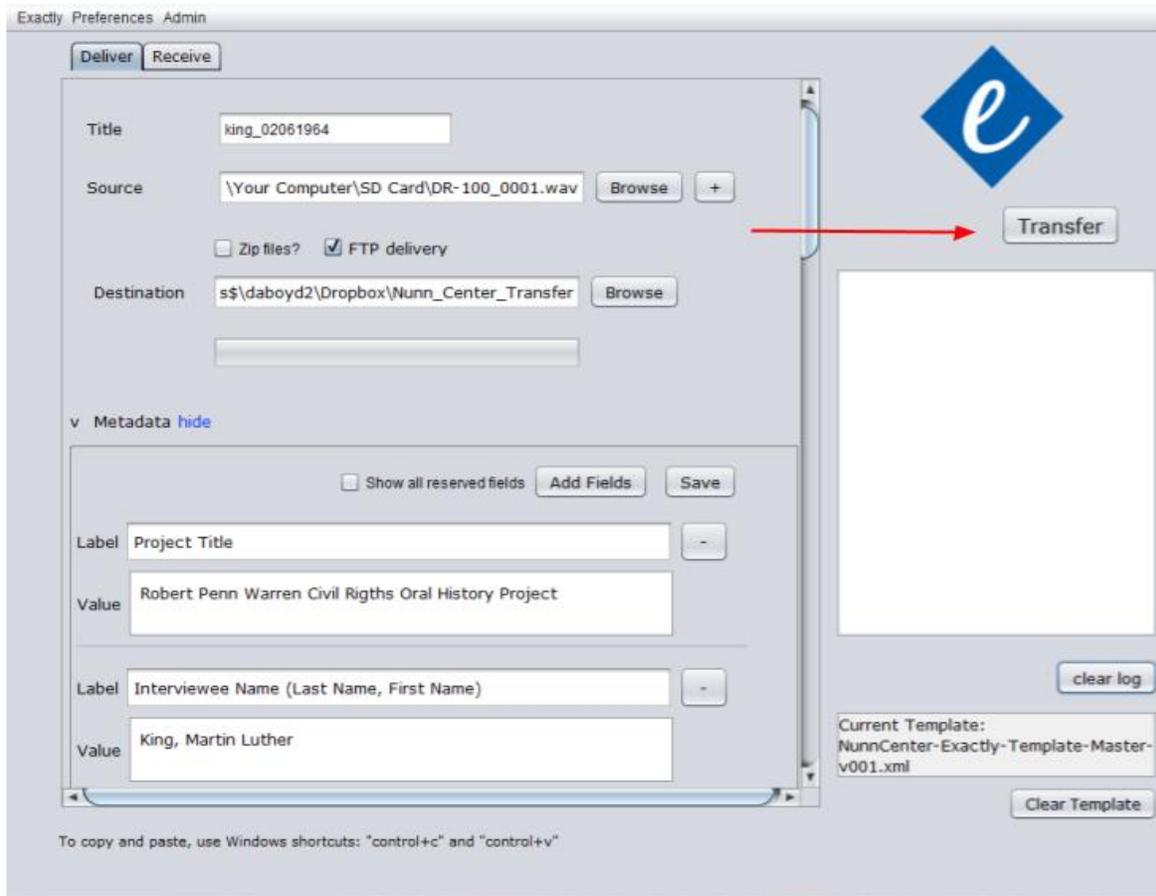
- a. **Labels** are used to identify the field.
- b. **Values** are the contents of the field.



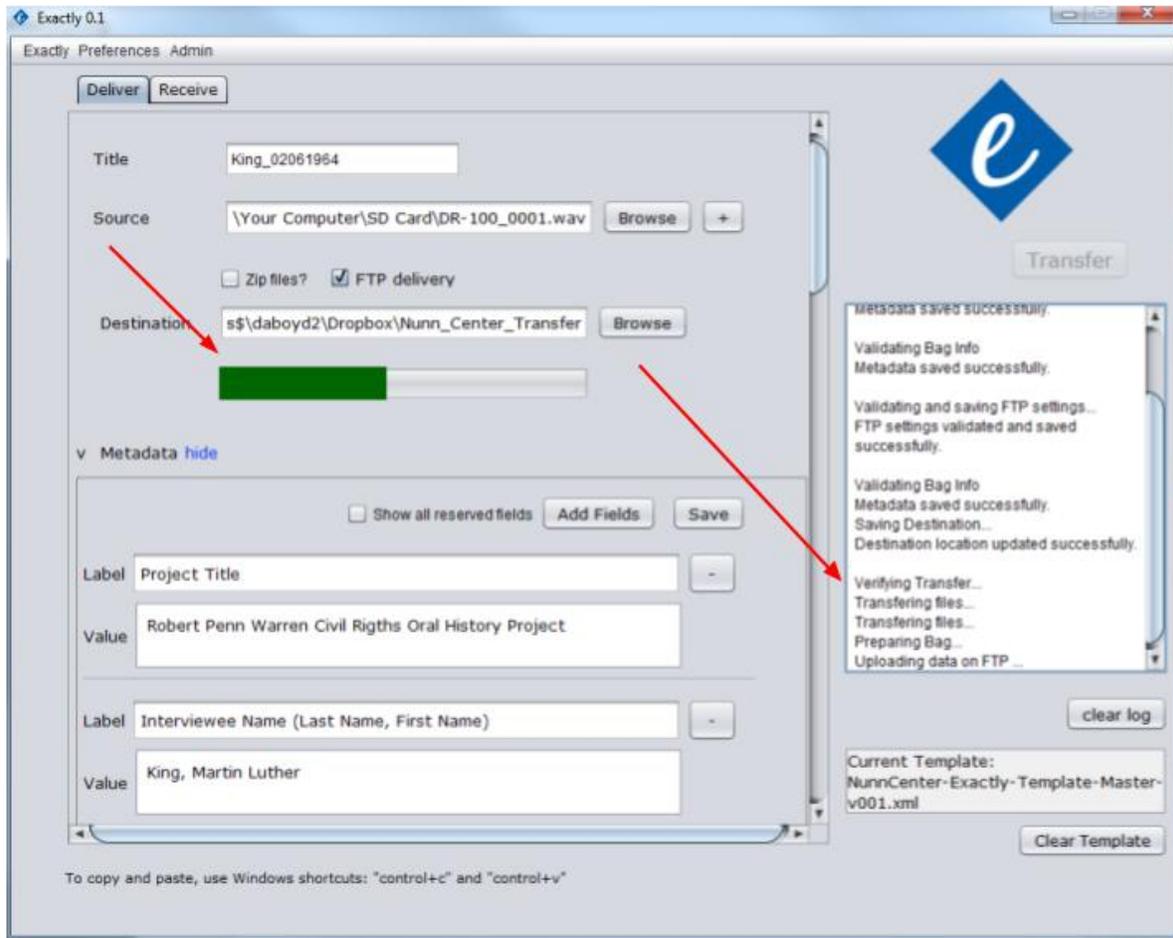
5. **Save:** You must save your metadata prior to submitting your package.

Transferring Files

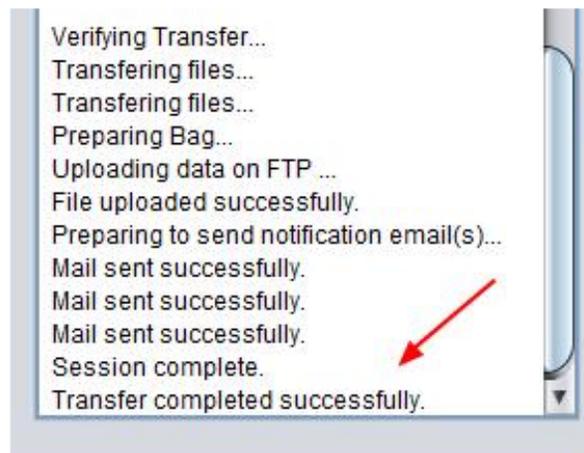
Using Exactly to transfer files is easy. Once you have the application configured, and your metadata is complete, all you have to do is to press the “transfer” button in the [Transfer Quad](#) (upper right).

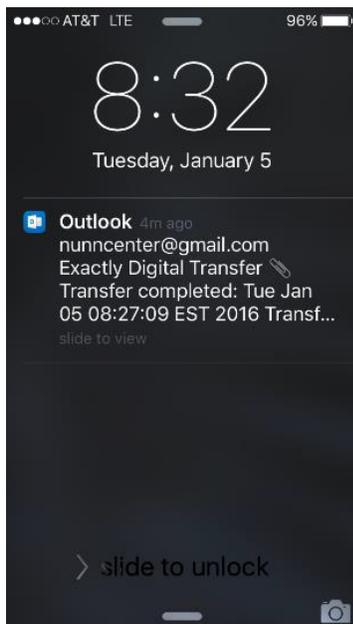


The status bar and log (right) will tell you the status of your transfer.



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





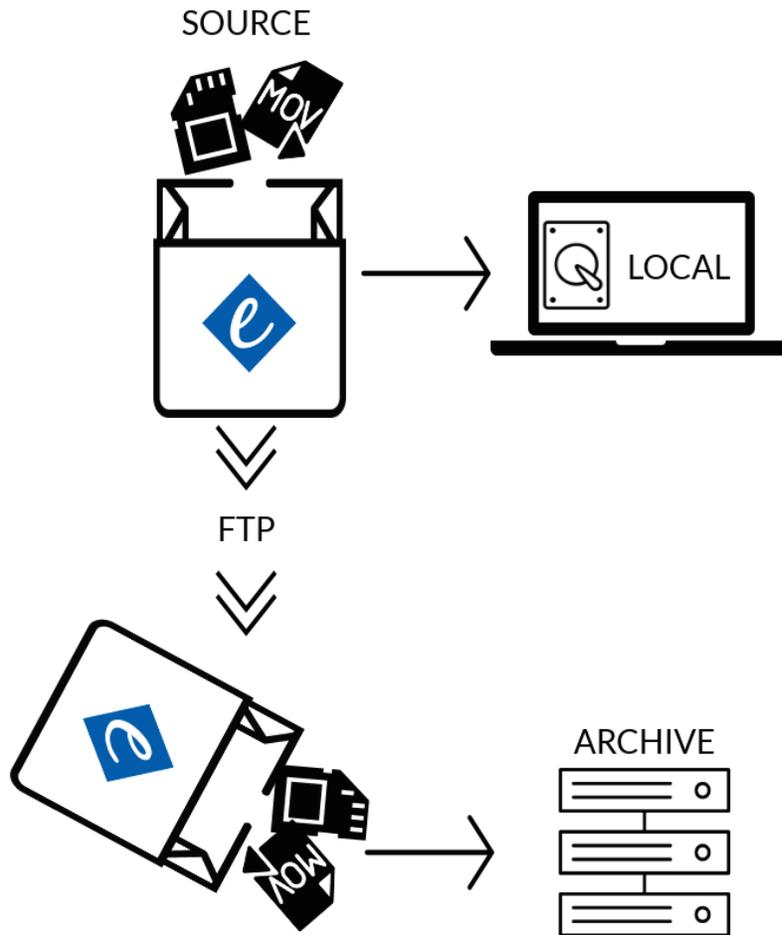
If you have [email notifications](#) configured and enabled and your email address was added to the notification list, you should promptly receive an email indicating the successful transfer.

Remember, if you are using FTP or SFTP 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. Synchronization is done automatically by the application when connected to the internet.

Transfer Readiness Checklist

- Package-Level Metadata:** Have you entered the required package-level metadata? Title? Have you chosen the source file and identified your local destination?
- Preset Configuration Template:** If the receiving institution has provided a preset settings configuration file, have you imported your preset?
- Mode of Transfer:** Have you identified how you will be transferring file(s)? Dropbox? FTP? SFTP?
- Email Alerts:** Have you entered your email so you will receive email notifications? *Preferences—Email Notifications*
- Metadata:** Fill out the metadata values fields. Don't forget to save your metadata prior to transfer. If you have questions about how to input your values into the fields, contact the receiving institution.
- 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.
- 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). It is always best to reach out to the receiving institution to confirm the transfer.

Exactly Workflow Map #1



Exactly Workflow Map #2

