Performing Document Collections

Goal
You will collect native documents.

The collection action allows the user to place documents into a collection set and collect the native (original) of the document. When a collection occurs, RG collects the native of the file and copies it into the RG repository (data store). This can be done explicitly by using the collection action.

NOTE: More detailed help instructions can be found in Rational under Help>User Guides on the toolbar.

Prerequisites
User has created a Search.

Accessing Collections
To access the Collections screen, go to Document Sets>Collections

This screen will list all existing collections and allow you to create new collection sets and organize them within folders. All collections can be edited, moved etc. on the “Document Sets – Collection” screen.

Folders
Creating a Folder
Folders allow you to organize your collection sets. They are optional. To create a new folder, click on the Create link in the upper left corner of the screen and select New Folder. A dialog will pop up where you can name your folder (required) and add a description (optional). When done, click Create. The folder will appear listed in alphabetical order in the left panel of the screen.

NOTE: If you want to create a top-level folder, make sure the row Collections is selected. You can select it by clicking on its row. If you want to make a subfolder, select the folders row in which you wish to be the top-level folder and click Create – New Folder.

New Collection
Performing Document Collections

To create a new collection within a folder, click on the New Collection option and a dialog will appear. Enter a name (required), description (optional), search (optional) and collection priority (select) and click Create. The search option is explained under “Creating a new collection from the collection screen – evergreen collection” below. The collection will be added to the left panel. If a search was not attached, you will then need to add documents to your preservation either by searching or adding from another set such as a folder.

Move Folder
To move a folder to either the top-level folder list or under another folder, click on the Move Folder option and a dialog will appear that mimics the left panel. Hover over the row of the folder you wish to select, and you will see a checkmark icon to select the folder. Once the folder is selected, click Move and the folder will be moved.

NOTE: You will not see a checkmark when hovering over the row of a folder or collection that you are not allowed to move to. All subfolders (if applicable) will also be moved.

Edit Folder
To edit a folder, click on the Edit Folder option and a dialog will appear allowing you to edit the name and description of the folder you have selected. Make your changes and click Save.

Delete Folder
To delete a folder, click on the Delete Folder option. A confirmation dialog will appear. Click Delete if you wish to delete the folder.

NOTE: All subfolders will also be deleted. You cannot delete a folder with a collection within it. You must first delete the collection and then you will be able to delete the folder. Deleting the collection will delete it from the tree.
Creating a new Collection
To create a new collection, click on the Create link in the upper left corner of the screen and select New Collection. A dialog will pop up where you can enter the below information.

Enter the following information:
- Name (required)
- Description (optional)
- Search (optional) Adding a saved search to a collection makes the collection evergreen
- Collection Priority – Collection priority is used to prioritize the collection being created against all other collections. Collection priority is assigned with any set that has the option to collect.

NOTE: Collection priorities can be altered by editing the collection.

Click Create when completed.

Example:

EVERGREEN COLLECTION: means that the search will run daily, and any new documents identified will be added to the set

Evergreen collections can be identified by the icon the left of their name (as shown below). They are different because they have a green circle over the icon.

NOTE: You cannot add additional documents into an evergreen set. Evergreen sets are additive only. Rational Governance does not remove documents from the set when it runs the search each night.
Performing Document Collections

Create

Collections

Brenda Create Folder Test

Brenda Create Collection...

Brenda Evergreen AI

Edit Collection

Name: * Brenda Create Evergreen Collection

Description: AI

Search: Brenda Oracle Awards Training - AI

Collection Priority: * Low

Save Cancel
Collect
The collection action allows the user to place documents into a collection set and collect the native (original) of the document.

To create a collection, click on the **Action – Collect All** option from the toolbar after running the search. The dialog box with your folders where you can select a collection set or create new folders and/or collection sets etc.