DocuCast

Document Revision & Backup System

Users's Guide

Version 1.0

Inhalt

Intended purpose

This document provides information about installation, configuration and general usage of the DocuCast software. DocuCast is a (distributed) file revision and backup system for use in professional and private environments. DocuCast stores documents and other files quickly after they have changed, on one or more computers. Every revision of a file can be restored later.

System requirements

Supported operating systems are Microsoft Windows 7, 8.x, and 10 (32 or 64 bit). A Java runtime environment (version 7 or 8) is required.

How DocuCast works

Whenever a file is created or modified, a file event will be raised. Such events are caught by DocuCast and analyzed with respect to the current configuration. In this configuration you can specify the rules for handling these events, which means, saving copies of the files of interest which just have been changed.

Using DocuCast

When DocuCast is installed, a default configuration will be used which targets common document files like Microsoft Office or OpenOffice files stored anywhere in the user's home path. The configuration can be quickly adjusted to your needs (e.g. you can add more file extensions).

DocuCast stores these files in a local, embedded database. A certain percentage of free disc space will be used on the same computer where DocuCast is installed (default is 5%), to keep as many file revisions as possible.Installation and configuration - Quickstart

To install DocuCast, start **docucast-setup.exe** with administrator privileges. Follow the installation instructions. After completing the setup process, a program group will be created with the following links:

- *DocuCast*: starts the main program (the "DocuCast client") which monitors file events on the computer. Includes an embedded database.
- *Uninstall*: Removes DocuCast installation completetly.

Using DocuCast in distributed mode

Storing files only on the same computer might not be safe enough. That's why DocuCast can be quickly extended up to a client-server network, where DocuCast instances exchange files between each other in the local network. Due to these redundant backups, even in case of a computer failure, data won't be lost. Instances can be started at any time. The migration tasks needed for this will take place automatically. There is no need to provide any IP addresses. All instances find each other using multicast discovery.

Important
Although every file is instantly accessible by any connected instance, the synchronization of files progresses slowly (it takes place every 5 minutes).

Using DocuCast

The DocuCast client watches the file-system for changes and performs instant backups, if the file-system event occurs in a file-path specified in the client.xml configuration. Each file that is copied specifies a new file revision. All revisions can be opened and restored later, in case data is lost, overwritten or just needed again for any other reason.

Most of the time, the DocuCast client performs backups silently, just showing a small balloon popup, if configured to. However, in addition to automated backups triggered by file changes, a user may also perform *manual* backups at any time, by just dragging files or folders into the "Sink" tab.

Instant backup mode

When changes in the file system occur, the DocuCast client is comparing the event source to the configured source paths in the client.xml. If a match is found, the client takes action.

- A new file entry on a DocuCast server if a new file was created. The client displays the message "Stored file - click to comment".
- An updated entry on a DocuCast server if a file was updated. The client displays the message "New revision (modified) - click to comment" or "New revision (renamed)" depending on what actually changed, or
- Nothing if no change was actually detected (e.g. the file was saved again but it content did not change). It displays "New revision (no change)".

If multiple DocuCast servers are running, each entry will be saved redundantly on all servers, after a while.

Important

When first starting the DocuCast client you will be asked to define a password to encrypt your personal files!

TIP

If the balloon popup contains the phrase "click to comment", you can simply click on the message and enter a comment for the last file saved (see Figure 1).
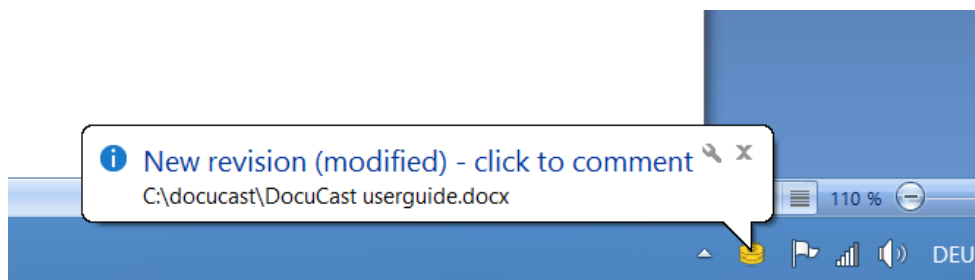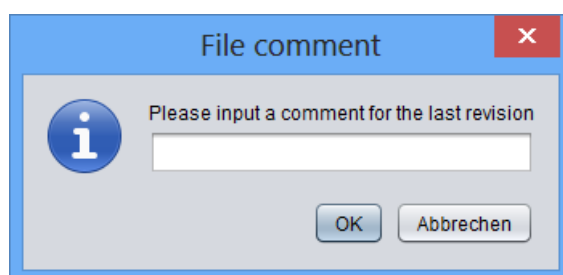

Figure 1: Notifications during backup

Figure 2: Prompt for a file comment.

Manual backup mode (drag & drop)

Any time you feel that some files should be saved, you may drag and drop folders or files into the "sink" tab of the DocuCast GUI. First, click on the DocuCast tray-icon to open the GUI. Then select the "sink tab". Each file is handled as described before.

Important

Please note that all directories are scanned recursively for files when dropping directory entries into the sink tab!

Searching for files

Searching for file revision in DocuCast can be done in various ways.

Toolbar search

Selecting the search button from the toolbar switches to the search tab folder and executes the search method performed last. If no search parameter is defined, the 10 newest file revisions will be listed in the search tab.
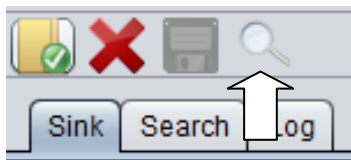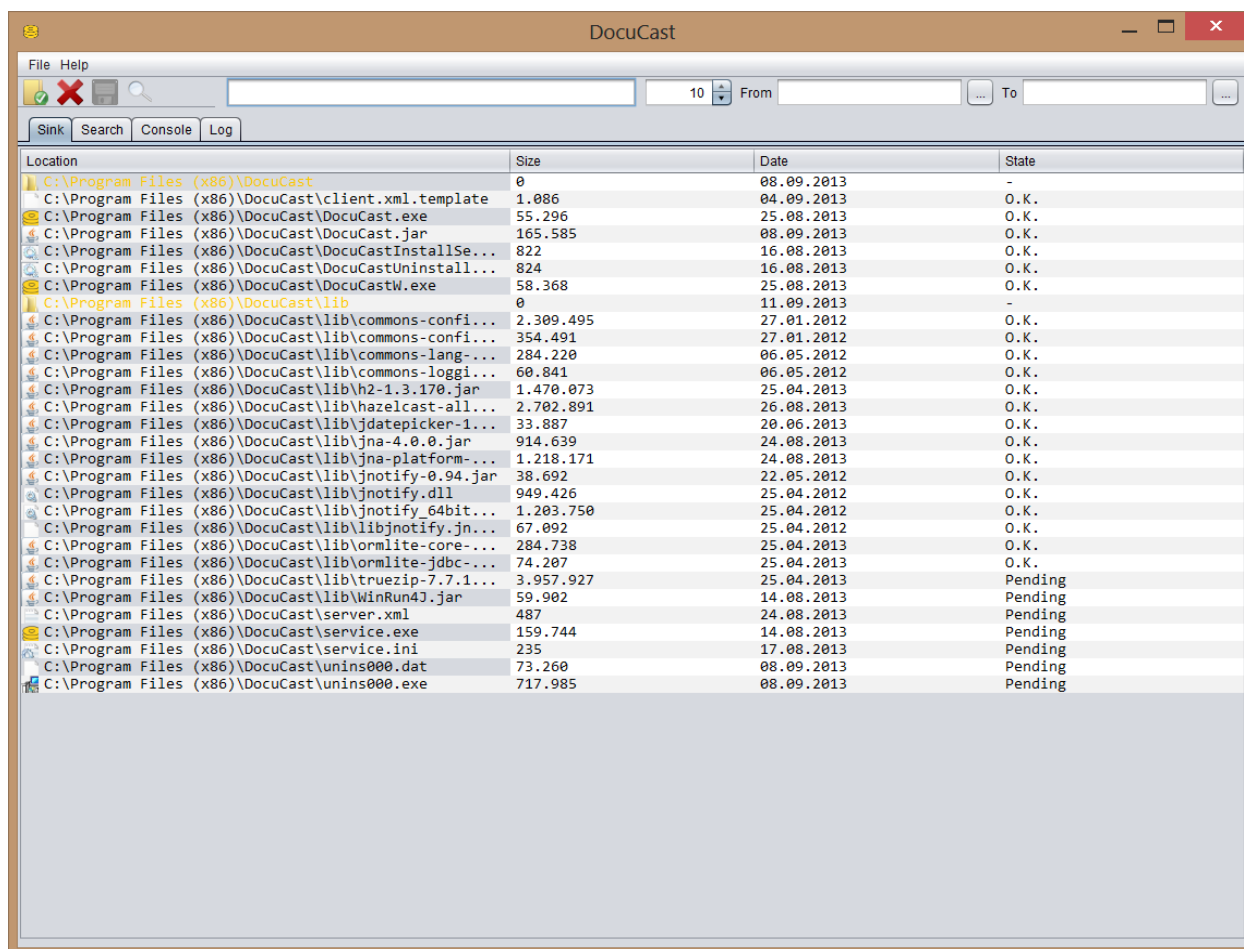

Figure 3: The search button

Figure 4: Manual backup

Text search

By entering text in the textfield, you can search for a file name, a file path or a file comment. The search is not case-sensitive. Search results are displayed on the fly. To increase or decrease the number of results, adjust the spinner control.
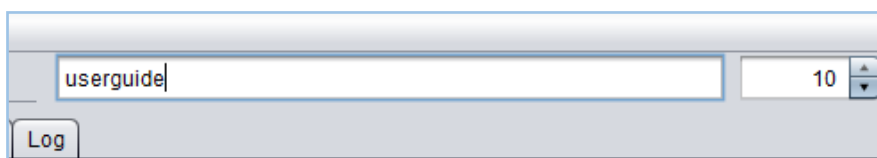
Figure 5: Text search and number of results

Time window search

The two datepicker controls allow you to specify a time window. This time window can be used as an additional filter to refine a text search. If no text is defined, all files will be included. To increase or decrease the number of results, adjust the spinner control.
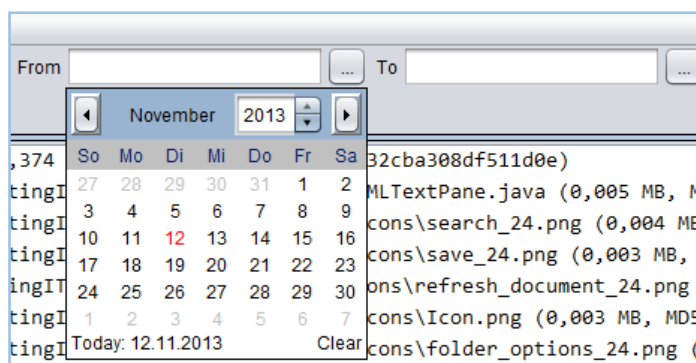

Figure 6: Date picker controls

Explorer shell extension

To view the complete revision history of a file, you may use the item "DocuCast history" that is available in the explorer context menu.
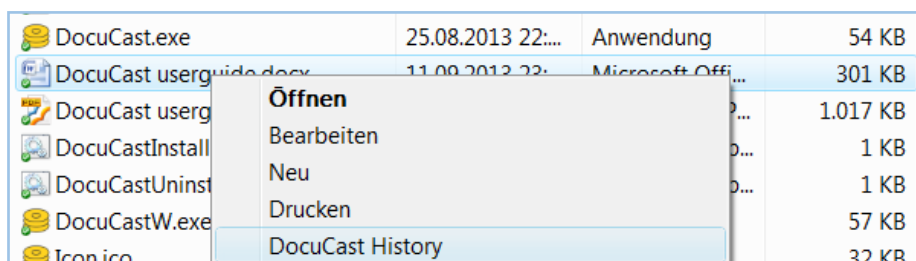

Figure 7: Explorer shell extension

Actions on list items

Preview with system default application

If you want to open a file revision from the list of search results with the system's default application, just **double-click** on the item, or select "open" from the context menu (see Figure 8).

Restore and other actions

To open the context menu, **right-click** on a list item in the search tab, once search results are available. From there various actions, like *restore* in original or custom path, set a *comment* or *delete*, can be selected.
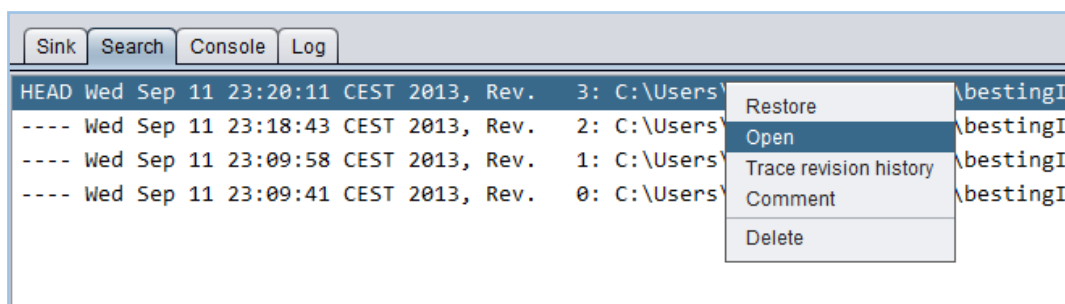
Figure 8: Context menu

Configuring DocuCast

DocuCast can be configured using the Settings tab in the client GUI. Changes are reflected to the underlying XML file (see below).

DocuCast can also be configured manually in the **client.xml** file. This file is automatically copied into the user's home path ([home]/.DocuCast/client.xml) during the first start by using a template file (client.xml.template). Each user-specific client.xml can be opened directly from the client's GUI (*File -> Settings -> Client settings* or *options button* on the top left).

Client configuration (settings / client.xml)

- User ID: identifies a user and links the user to the private set of documents (or files, resp.). It equals to the Windows user name when set to "~".
- Database path: specifies a folder where to store the backup data of the local user client (~ means user home path).
- Enable DocuCast network backup: When checked, DocuCast instances exchange backup data in the LAN.
    - o Discovery UDP address: used to discover other DocuCast instances in the LAN
- Monitor: This section defines which locations should be monitored for file changes.
    - o File filters can be specified below in terms of size ("maxsizemb") and / or file extensions ("extensions").
    - o XML "sources" tags in advanced configuration: each path has one "source" entry (below "sources" which describes a user defined location.
    - o Set the field "notify" to *true* or *false*, depending on if you want to be notified each time a file is updated and stored.
- Percentage of free space: defines how much free space will be used for backup data (in percentage of free disc space in the database path).
- The "ignore" field specifies the number of file events in the path which will be ignored if raised in a very short time (e.g. if a folder is copied or a program is installed).

Important
A restart is required after making changes to the configuration files!