



DOCUMENTATION FOR THE ePADD v5.0 BETA 1 RELEASE CAN BE VIEWED HERE:
[ePADD 5.0 BETA 1 USER DOCUMENTATION.](#)

ePADD Installation and User Guide

November 2017

Version 4.1

ePADD is a software package that supports archival processes around the appraisal, ingest, processing, discovery, and delivery of email archives. It is open source and licensed under an Apache Public License, v2.0. The latest information about the software can be found [here](#).

ePADD development is managed by Stanford University's Department of Special Collections & University Archives, in collaboration with partners at Harvard University, the Metropolitan New York Library Council (METRO), University of Illinois at Urbana-Champaign, and University of California, Irvine.

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04/23/2014	.02	Guide updated to include Appraisal Module
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02/01/2016	1.1	Guide updated to reflect IMLS partner feedback
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08/19/2016	2.0	Guide updated for all modules reflecting new functionality in 2.0 release
11/21/2016	2.1	Guide updated reflecting new configuration file and other minor changes in 2.1 release
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08/10/2017	4.0	Guide updates with instructions for standing up Discovery Module on web server
08/15/2017	4.1	Guide updated for all modules reflecting minor fixes in 4.1 release
11/13/2017	4.1	Guide updated to reflect latest OS support
01/22/2018	-	Link added to user documentation for 5.0 beta 1 release

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1 Overview

Welcome to ePADD, the all-in-one email appraisal, processing, discovery, and delivery solution for donors, archival repositories, and researchers. This installation and user guide will assist the new ePADD user in making the most of the program.

ePADD is comprised of four modules – Appraisal, Processing, Discovery, and Delivery – which are designed to facilitate the process of working with email archives.

Appraisal: Allows creators, dealers, and curators to easily gather and review email archives prior to transferring those files to an archival repository.

Processing: Provides archivists with the means to arrange and describe email archives.

Discovery: Provides the tools for repositories to remotely share a redacted view of email archives with users through a web server discovery environment.

Delivery: Enables archival repositories to provide moderated full-text access to unrestricted email archives within a reading room environment.

2 Getting Started

This section will get you started working with ePADD from installation through navigating the software platform.

2.1 System Requirements

OS: 64-bit, Windows 7 SP1 / 10, Mac OS X 10.12 / 10.13, Ubuntu 16.04

Memory: 8 GB RAM (4 GB allocated to the application by default)

Browser: Chrome 61 or later, Firefox 55 or later.

Java: Java Runtime Environment 64-bit, 8u101 or later required.

2.2 Installing ePADD

ePADD has been optimized for Windows 7 SP1 / 10, Mac OS X 10.12 / 10.13, and Ubuntu 16.04 machines.

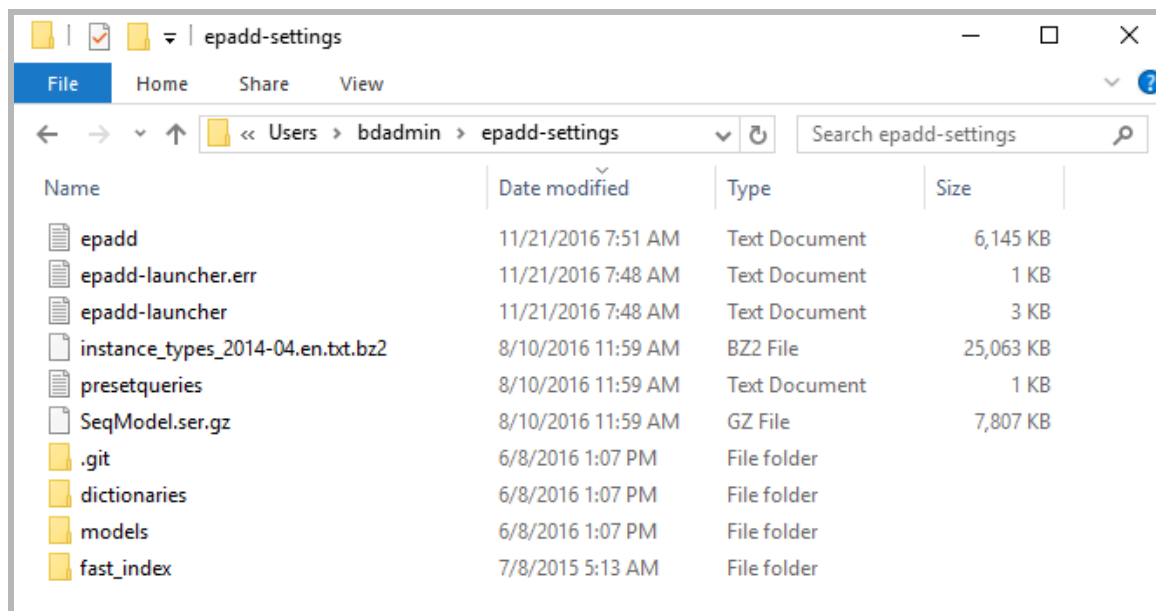
Follow the instructions below for your operating system.

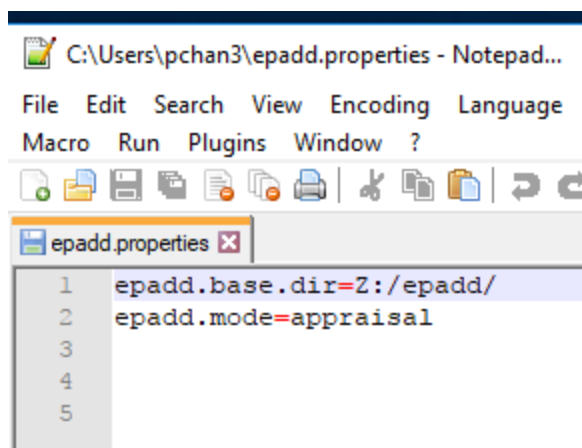
2.2.1 Installing ePADD on Windows

Please download the latest ePADD distribution files (.exe) from <https://github.com/ePADD/epadd/releases/>. **You will need to have Java 8 or later installed on your machine for ePADD to work properly.**

When you run ePADD for the first time, a directory for the Appraisal Module is created to store working files. When ePADD starts up, it checks this directory and relies upon it to resume earlier work. If the software does not locate this directory, ePADD will create it. The ePADD Appraisal Module directory is located at `c:\users\<username>\epadd-appraisal`.

In order for functionality for authority reconciliation to function correctly, you must also separately download the configuration files (epadd-settings.zip), accessible via <https://github.com/ePADD/epadd/releases/>. Once downloaded, unzip this file into your user directory (`c:\users\<username>\`).





Example of the custom configuration file

Some settings can be configured using a custom configuration file, *epadd.properties*, which must be in plain text and created in the user's home directory (typically [c:\users\<username>\](#)). If the file is not present, ePADD will revert to the existing defaults. Editing this file is only necessary if you wish to change the defaults, for instance, if your default directory does not contain enough space.

- 1) Using a text editor, edit the existing *epadd.properties* file.
- 2) Add to it from the following list of properties.

epadd.settings.dir= The location of the epadd-settings folder. The default is [c:\users\<username>\epadd-settings](#). Note the use of the forward slash in the configuration file.

epadd.base.dir= The location of the ePADD module folders (epadd-appraisal, epadd-processing, epadd-discovery, and epadd-delivery). The default is [c:\users\<username>\epadd-appraisal](#), etc. Note the use of the forward slash in the configuration file.

epadd.mode= Defines the default module upon opening ePADD. Value should be one of the exact strings, "appraisal", "processing", "discovery", or "delivery" (without quotes). Match is case insensitive. The default is appraisal.

admin= Defines the admin name and email address to appear on the debug screen. The default is Peter Chan, pchan3@stanford.edu.

epadd.default.lexicon= Defines the default lexicon. All other lexicons can still be selected using the dropdown menu.

3) Save the file.

Depending on your network permissions, you may be asked to allow ePADD access to your internet connection. ePADD requires an internet connection to download email from an email account using the IMAP protocol.

Upon running ePADD, the application icon  will appear in the Windows Taskbar. (If you do not see the icon, it may be hidden from view. See <http://windows.microsoft.com/en-us/windows7/change-how-icons-appear-in-the-notification-area> for more information). Right-click on the ePADD icon at any point to open an ePADD window or to quit ePADD.

Note: The Discovery Module is run through a separate distribution file (epadd-discovery-standalone.jar), accessible via <https://github.com/ePADD/epadd/releases/>.

ePADD saves all data in folders in the `c:\users\<username>\` directory, unless you have defined a different location using the epadd.properties file. We recommend as best practice making periodic backups of all ePADD related folders in this directory, which may include: epadd-settings, epadd-appraisal, epadd-processing, epadd-discovery, and epadd-delivery.

Note: ePADD allocates 4096 MB RAM to the application by default. If the standard RAM allocated does not suffice, you may wish to run the Java application directly from the command line (epadd-standalone.jar). From the Command Prompt, you can run the application using this command: `java -Xmx#g -jar epadd-standalone.jar`, where # identifies the amount of RAM (in GB) you wish to allocate.

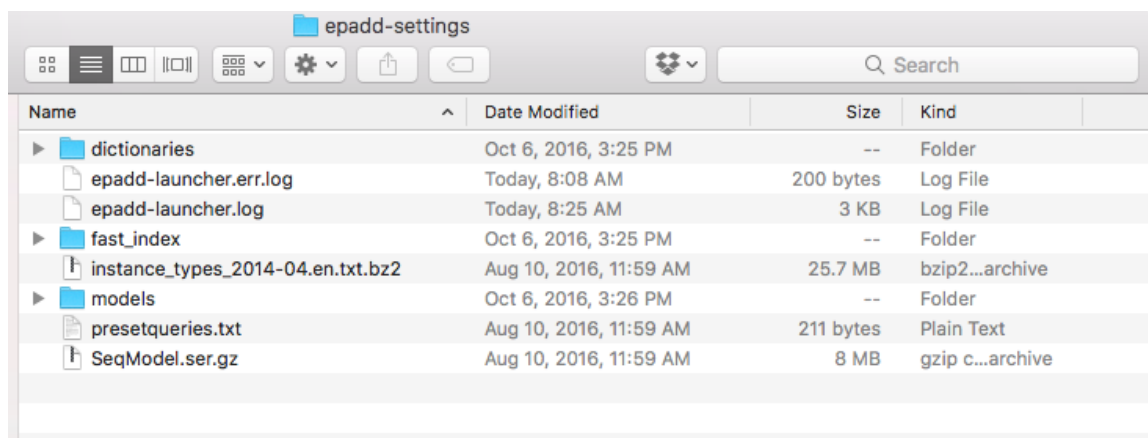
Note: The user can optionally create and modify a named entity kill list to suppress text strings that ePADD has identified as entities from appearing as such within the software. To do so, create a text file titled "kill.txt" in the ePADD-settings folder. Each line of the document should contain a single named entity. Save the file and restart ePADD. The entities you listed should be suppressed.

2.2.2 Installing ePADD on OSX

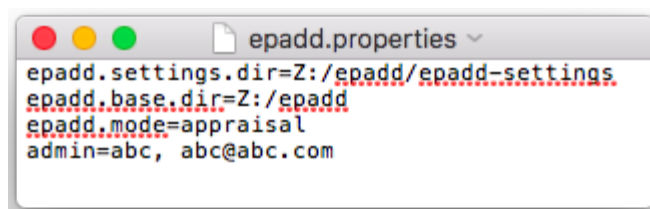
Please download the latest ePADD distribution files (.dmg) from <https://github.com/ePADD/epadd/releases/>.

When you run ePADD for the first time, a directory for the Appraisal Module is created to store working files. When ePADD starts up, it checks this directory and relies upon it to resume earlier work. If the software does not locate this directory, ePADD will create it. The ePADD Appraisal Module directory is located at [Macintosh HD/Users/<username>/epadd-appraisal](#).

In order for functionality related to authority reconciliation to perform correctly, you must also separately download the configuration files (epadd-settings.zip), accessible via <https://github.com/ePADD/epadd/releases/>. Once downloaded, unzip this file into your user directory ([Macintosh HD/Users/<username>/](#)).



Note: The epadd-settings directory also contains the presetqueries.txt document (after it is created by ePADD), which enables the user to search for custom regular expressions.



Example of the custom configuration file

Some settings can be configured using a custom configuration file, *epadd.properties*, which must be plain text and created in the user's home directory (typically [HD/Users/<username>/](#)). If the file is not present, ePADD will revert to the existing defaults. Editing this file is only necessary if you wish to change the defaults, for instance, if your default directory does not contain enough space.

Follow the following steps to edit the configuration file.

1) Using a text editor, edit the existing *epadd.properties* file.

2) Add to it from the following list of properties:

epadd.settings.dir= The location of the *epadd-settings* folder. The default is `<HOME>/epadd-settings`.

epadd.base.dir= The location of the ePADD module folders (*epadd-appraisal*, *epadd-processing*, *epadd-discovery*, and *epadd-delivery*). The default is `<HOME>/epadd-appraisal`, etc.

epadd.mode= Defines the default module upon opening ePADD. Value should be one of the exact strings, "appraisal", "processing", "discovery", or "delivery" (without quotes). Match is case insensitive. The default is appraisal.

admin= Defines the admin name and email address to appear on the debug screen. The default is Peter Chan, `pchan3@stanford.edu`.

epadd.default.lexicon= Defines the default lexicon. All other lexicons can still be selected using the dropdown menu. The default is general.

3) Save the file.

Depending upon your network permissions, you may be asked to allow ePADD access to your internet connection. ePADD requires an internet connection to download email from an email account using the IMAP protocol.

In Mac OSX, the application icon  will appear in the OSX Finder Toolbar. Right-click on this icon at any point to open an ePADD window or to quit ePADD.



ePADD requires an internet connection to download email using the IMAP protocol

Note: The Discovery Module is run through a separate distribution file (epadd-discovery-standalone.jar), accessible via <https://github.com/ePADD/epadd/releases/>.

ePADD saves all data in folders in the `Macintosh HD/Users/<username>/` directory. We recommend as best practice making periodic back-ups of all ePADD related folders in this directory, which may include: epadd-settings, epadd-appraisal, epadd-processing, epadd-discovery, and epadd-delivery.

Note: ePADD allocates 4096 MB RAM to the application by default. If the standard RAM allocated does not suffice, you may wish to run the Java application directly from the command line (epadd-standalone.jar). From the Terminal, you can run the application using this command: `java -Xmx#g -jar epadd-standalone.jar`, where # identifies the amount of RAM (in GB) you wish to allocate.

Note: The user can optionally create and modify a named entity kill list to suppress text strings that ePADD has identified as entities from appearing as such within the software. To do so, create a text file titled "kill.txt" in the ePADD-settings folder. Each line of the document should contain a single named entity. Save the file and restart ePADD. The entities you listed should be suppressed.

2.2.3 Compatibility Note

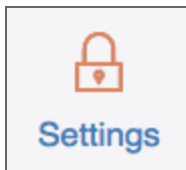
If you have worked with ePADD on previous release of ePADD and plan to transfer that work to a different version of ePADD, please contact us for assistance.

2.3 Running ePADD

To run ePADD, simply double-click the executable file.

2.4 Selecting a Module

The first time you run ePADD, it will default to the Appraisal Module. This may be changed in the Settings menu, which can be accessed via the Browse menu. Note that an email archive must first be ingested into ePADD and exported through the Appraisal Module before it can be accessed in the Processing Module, and exported once again to the Discovery and Delivery Modules before it can be accessed in those modules.



Select this icon to access the Setting Menu

 SET IMAGES

 SET DEFAULT ACTIONS

 SET BULK FLAGS

 RE-RECOGNIZE ENTITIES

 DATA QUALITY REPORT

 UNLOAD ARCHIVE

 DELETE ARCHIVE

ADVANCED

SELECT EPADD MODULE

APPRAISAL

Selecting a Module from the Settings Menu

The four modules include:

Appraisal Module – Provides creators, curators, and archivists with a toolset to load, review, and manage an email archive prior to accessioning that archive to a repository. The module includes various methods to help a user determine the relevance and importance of email messages, to identify and flag sensitive messages, and to impose restrictions on access. Email can be exported from this module to the Processing Module.

Processing Module – Enables an archivist to organize and edit an email archive following the initial appraisal of materials. Includes the ability to annotate messages, to identify and flag sensitive information, to further refine entity extraction, and to approve/assign authority headings. Email processed through this module can be exported to the Discovery and Delivery Modules. (Note that the Discovery Module is downloaded and run separately; see below for more information).

Discovery Module - A separate, web-based discovery environment designed to allow remote users to search email correspondents, headers, and extracted entities, while limiting full-text access to the materials.

Delivery Module – Provides end users with a suite of sophisticated search functionalities to query and review the full content of unrestricted email messages in a collection. This is a client-facing module that is designed to provide mediated access to the processed email archive from a managed workstation.

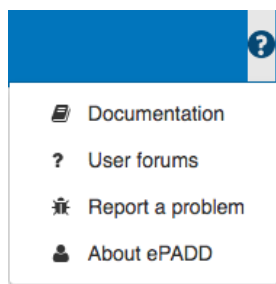
Note: While users can access a Discovery Module from the settings menu, implementing the module from a web server to provide public access requires additional work. Additional information about the Discovery Module can be found in *Section 5*.

Note: We have designed ePADD with the expectation that a given workstation will typically run one specific module, though we recognize this will not always be the case. If you are exploring ePADD for development purposes, and planning to run multiple modules on a single workstation, you may navigate between modules under *Settings*. Please note that it is always best practice to close the archive using the “Close” header menu option, and to fully quit ePADD, before beginning work in another module.

Please note that it is always best practice to fully quit ePADD and restart ePADD before beginning work in another module. You *must* fully quit and restart ePADD in order to switch to another module from either the Discovery or Delivery module.

2.5 Navigating ePADD

The navigation bar at the top of the screen will present you with primary menu options aligning with the functionality of a particular module. Selecting one of these primary menu options will bring you to a sub-menu offering the potential to carry out related tasks. ePADD is flexible and does not require that the user navigate through a given module in any particular order. Links to documentation, user forums, and other helpful information can be found via the **Help** dropdown located in the far right of the navigation bar.



Documentation and other information can be accessed from the Help dropdown

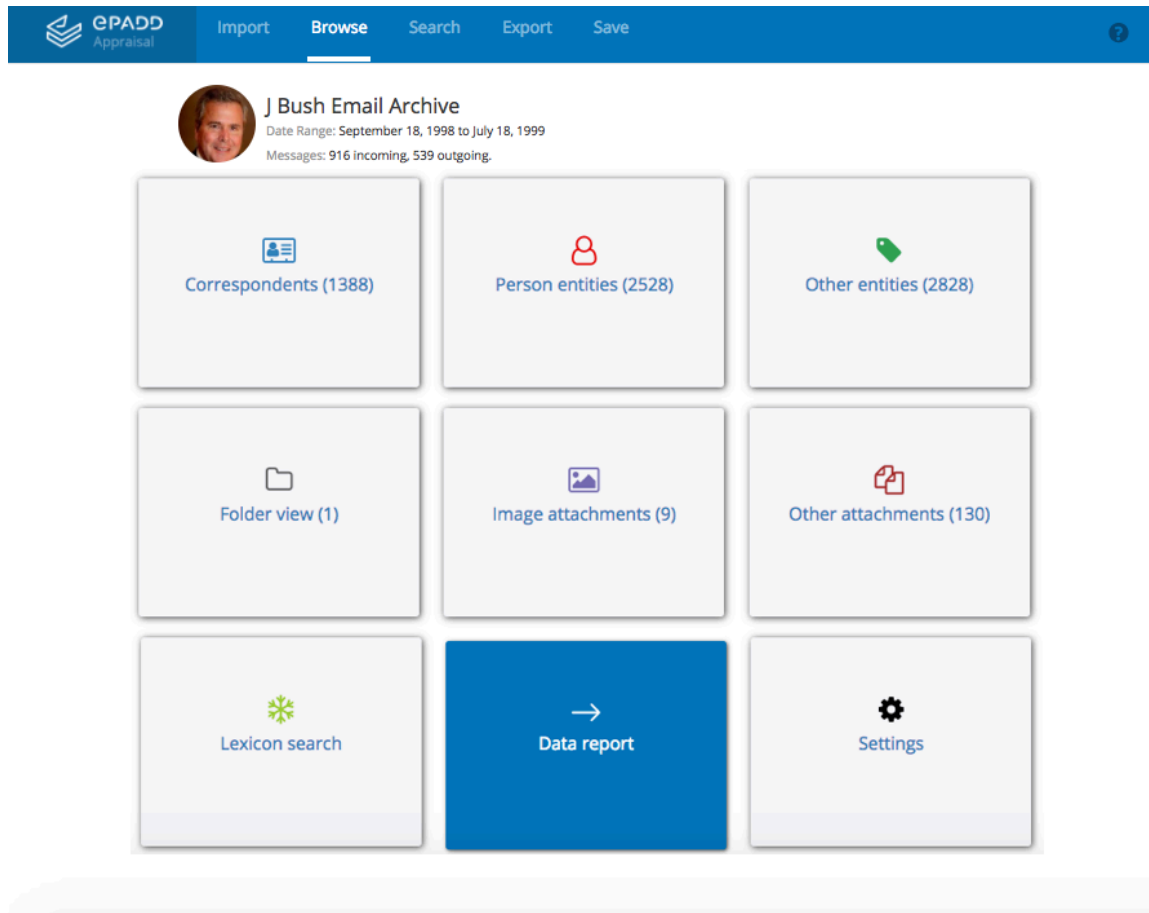
Collections in Processing, Discovery, and Delivery can be closed, and the user returned to the collection browse menu, using the "Close" header menu option, providing additional clarity when working with multiple collections. Note: As always, the user can only work with one collection at a given time.

Additionally, users can manually save their work in Appraisal, Processing, and Delivery, using the "Save" header menu option.

The user can generate a link to a specific message within a given module by selecting the "Link" option, next to the unique message ID. The generated link appears in the address bar. After loading a collection, pasting the link will take you immediately to that message.

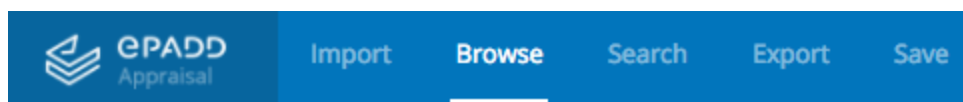
The *Settings* Menu, accessed from the Browse screen, will provide you with additional options depending on the current module. For instance, the Settings Menu may allow you to switch modules and perform other tasks. Additional options may include assigning supporting images to the collection or performing bulk actions (including restricting or not transferring groups of messages associated with a particular correspondent).

To view statistics for the email archive, select the **Data Report** option from Browse menu.



Search Tips can occasionally be accessed by selecting the  button located in the top right corner of a screen.

3 Appraisal Module



Appraisal Module Navigation Bar

The **Appraisal Module** provides creators, curators and archivists with a robust toolset to load, review and manage an email archive prior to accessioning that archive to a repository. The module includes various tools to help a user determine the relevance and importance of email messages, to identify and flag sensitive messages, and to impose restrictions on access.

3.1 Importing email

The Appraisal module is the default module (although this can be adjusted using the `epadd.properties` file). When first launched, you will find yourself on the **Import** screen. This interface is where you enter information (name and an associated email address) about the owner of the email account, as well as specify the location and account info, if applicable, of the MBOX files or IMAP email accounts that ePADD will be ingesting for review and potential transfer to an archival repository. You can select multiple accounts, as well as multiple MBOX files, by selecting the *Add another account* or the *Add another folder* buttons.

About this archive

 Name of archive owner	 Primary email address
Robert Creeley	creeley@buffalo.edu
 Archive title	
Robert Creeley papers - Email series	

Public Email Accounts (Gmail, Yahoo, Hotmail, Live.com, etc)

 Email Address	 Password

[+ ADD ANOTHER PUBLIC IMAP EMAIL ACCOUNT](#)

Private Email IMAP Accounts (Google Apps, university account, corporate account, etc.)

 IMAP Server	
 Email Address	 Password

[+ ADD ANOTHER PRIVATE IMAP EMAIL ACCOUNT](#)

Mbox files

☐ Folder or file location	 Name of email source

[BROWSE](#)

[+ ADD ANOTHER FOLDER](#)

[CONTINUE →](#)

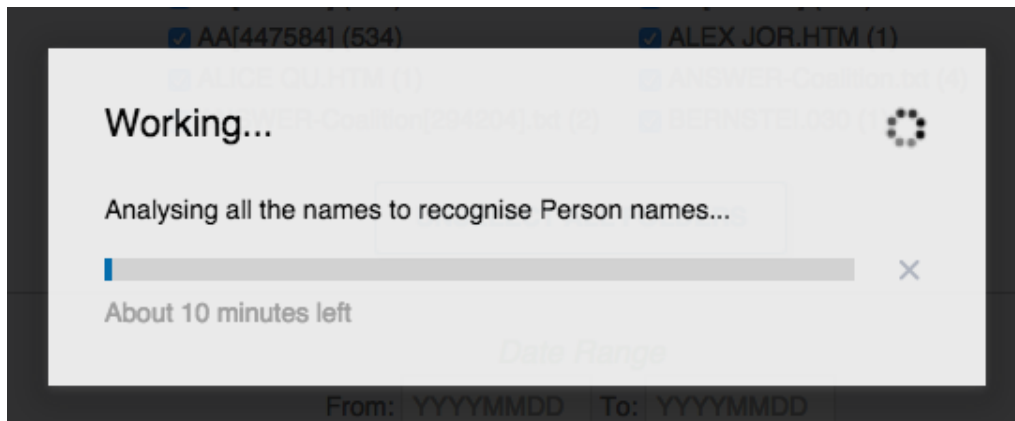
ePADD works with MBOX files as well as IMAP email accounts

The *Name of email source* field is a new field introduced in ePADD v2.0. Completing this field enables users to explore email by source after import, either by using the new *Folder View*, or by specifying the *Email Source* in Advanced Search. For ingest of email through IMAP, the

email account is used as the source name. Please ensure all relevant information has been filled out before pressing the *Continue* button at the bottom of the screen.

Note: Some IMAP-supported services may require you to confirm through email, text message, or some other means that the login attempt is authentic. Depending on the service, this may require the user to temporarily modify security settings to allow ePADD access.

Additionally, if this is your first time loading these email sources, and especially if you have selected to download mail from an IMAP account, it may take some time for ePADD to perform this initial step. This information will be saved locally for faster retrieval in the future.



ePADD will estimate how long it will take to load the selected email files

Once one or more email sources have been loaded, ePADD will give you the opportunity to select or deselect individual email folders associated with accounts, as well as specify a date range to review. **Note:** If importing mail from Gmail via IMAP, to ensure messages appear in the appropriate folders in the new *Browse Folders* interface, please be sure to deselect the non-unique “All Mail” folder during ingest.



Email Archives of Robert Creeley
Add email from folders

Import Browse Search Export

/Users/jschne/Desktop/Creeley-small/ (14 folders)

☐ AA (621)	☐ AA[192556] (49)
☐ AA[192603] (116)	☐ AA[273689] (138)
☐ AA[274050] (141)	☐ AA[278621] (235)
☐ AA[293750] (599)	☐ AA[293963] (349)
☐ AA[447584] (534)	☐ ALEX_JOR.HTM (1)
☐ ALICE_QU.HTM (1)	☐ ANSWER-Coalition.txt (4)
☐ ANSWER-Coalition[294204].txt (2)	☐ BERNSTEI.030 (1)

SELECT ALL FOLDERS

Date Range
 From: YYYYMMDD To: YYYYMMDD

This is optional. You may want to specify the range if you have submitted email to the repository before.

CONTINUE →

Confirming Selection of Email Sources

Once you have confirmed the mailboxes you would like to review for transfer, click the *Continue* button. Depending on the size of the accounts/folders selected, this next step may take some time as ePADD imports and deduplicates messages and performs a variety of additional steps intended to allow the user rich access to the email archive.

Note: No further steps are required to export the email archive to an archival repository at this point, if you so choose. To export at this time, proceed to **Section 3.4 Exporting Email**.

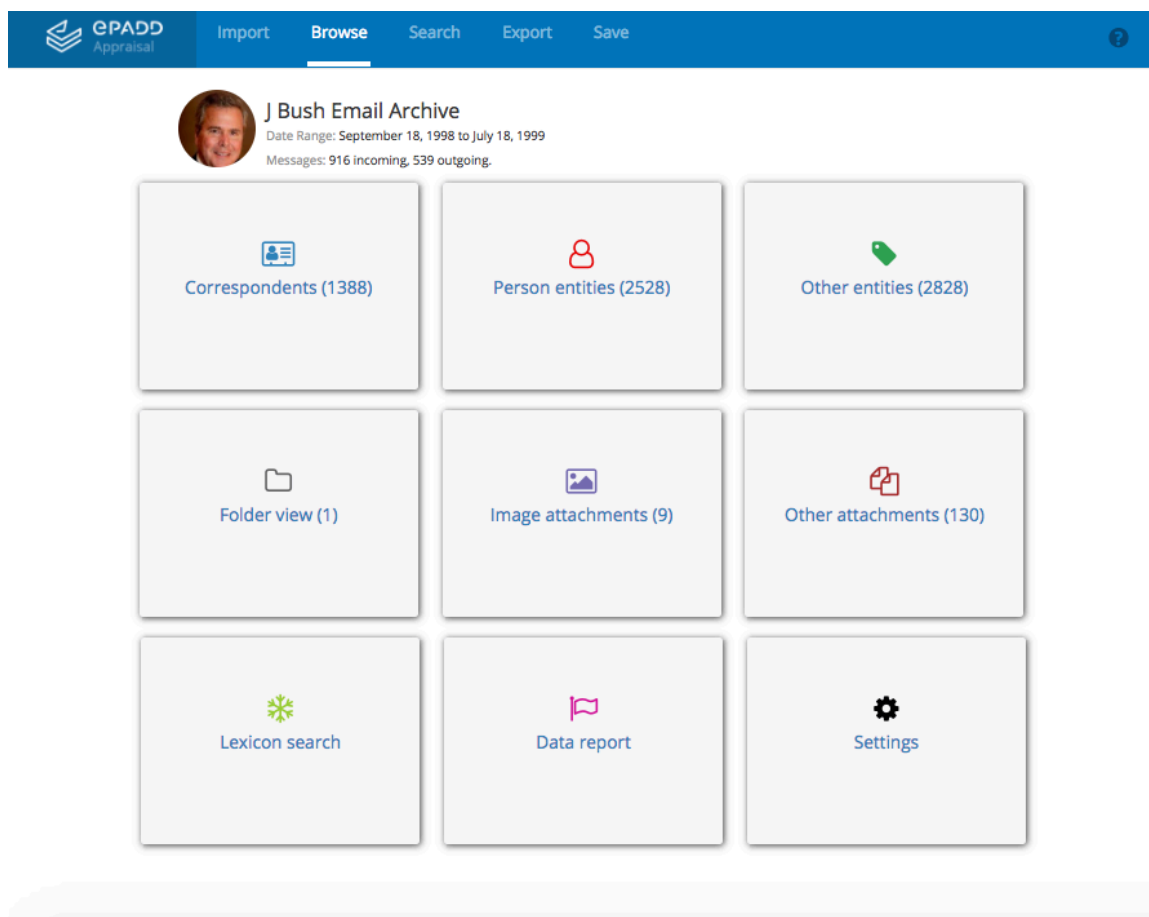
3.2 Reviewing Email

The Appraisal Module provides the user with a diverse set of tools for reviewing and assessing email prior to transfer to an archival repository. There is no set order to performing the following steps. In fact, different email archives will benefit from different approaches.

The various tools ePADD provides to assist in email review are described below.

3.2.1 Browsing Email Messages

After loading email into ePADD, the program opens the **Browse** screen as the default view. The user can also navigate to the **Browse** screen from the Appraisal Module Menu. From this screen, the user can browse by Correspondent; by Person or Other entities; by account folder structure; by Lexicon categories; or by whether messages include Image Attachments, Other Attachments; or contain sensitive information (identified through regular expressions).



ePADD provides many options for browsing email archives

3.2.2 Editing Correspondents

ePADD automatically merges identities for a single correspondent by intelligently analyzing headers. This step helps clarify relationships between email correspondents to allow for

higher-level analysis of the email archives. In order to improve the functioning of the actions that depend upon this behavior, ePADD allows the user to confirm or correct the identities of correspondents that ePADD has resolved through its analysis. To do so, navigate to the **Edit Correspondents** screen using the Settings Menu at the right of the navigation bar.

This screen allows the user to view and edit the email address(es) and name(s) associated with each correspondent. The default view of this screen lists all correspondents by volume of messages exchanged, but the correspondents can also be listed alphabetically using the dropdown selection at the top of the screen. The archive owner should always be the first individual listed.

```
-- Archive owner
Robert Creeley
Robert W Creeley
Bob Creeley
Creeley, Bob
robert creeley
Creeley, Robert
creeley
Creeley
creeley@stanford.edu
creeley@acsu.buffalo.edu
creeley@buffalo.edu
robert_creeley@brown.edu

--
Charles Bernstein
bernstei
bernstei@acsu.buffalo.edu
bernstei@bway.net
bernstei@ubvms.cc.buffalo.edu

--
Susan Howe VonSchlegell
Susan Howe
Susan Howe Von Schlegell
showe@acsu.buffalo.edu
snhowe@aol.com
```

ePADD allows the user to confirm or correct the identities of correspondents that ePADD has resolved using the Edit Correspondents screen

If names or addresses are incorrectly associated with the wrong individual, you can manually cut and paste them underneath a different entry.

Beginning with the v2.0 release, ePADD recognizes header information identifying messages as being sent from a mailing list where that information is available. These messages are differentiated from other correspondents in the Edit Correspondents screen under the heading "-- [ML]" Additional mailing list addresses can be manually identified and added under this heading using the Edit Correspondents interface. **Note:** Re-ingesting email will

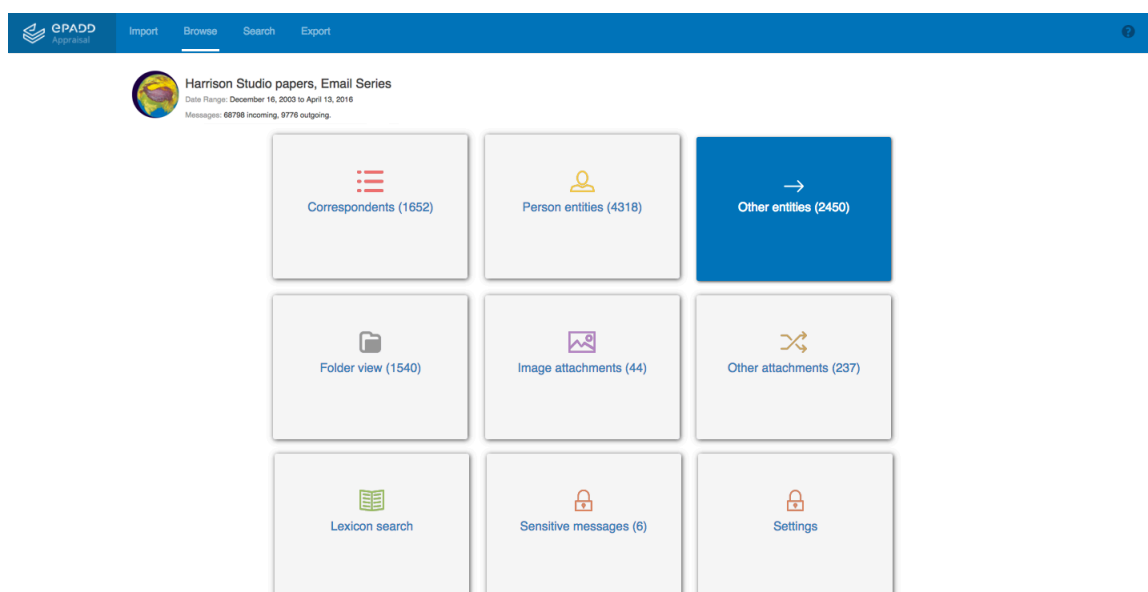
overwrite any user changes. Please be sure to keep track of which addresses have been marked as mailing lists if planning to reingest email. The **Edit Correspondents** list can be copied and pasted to an external document to simplify this step.

When you have completed your work editing correspondents, press *SAVE*.

3.2.3 Performing Entity Analysis

ePADD identifies, extracts, and manages entities using a custom natural language processing toolkit. The extracted entities include “persons” and “other entities”. “Other entities” includes fine-grained entities, as well as other entity types such as diseases, awards, and events. For more information, see [3.2.3.1 Reviewing Fine-Grained Types](#).

Extracted persons or other entities can be reviewed by navigating to **Persons** or **Other Entities**, accessible under the **Browse** menu option from the navigation bar.



Users are given the choice to review the entities in a table view or in a longitudinal graph view, which charts the most frequently occurring entities over time.

Clicking on any of the results on an Entities screen triggers a search of the selected term, opening a new browser window showing the relevant email messages, and allowing the user to navigate the search results by correspondent, email direction (incoming or outgoing), lexicon category (if relevant), attachment type (if relevant), or mail folder. This is the **Search Results** screen. For more information about using this interface to annotate

messages and mark messages for access restrictions, proceed to section **3.3 Appraising Email**, below.

3.2.3.1 Reviewing Fine-Grained Types

To review fine-grained types such as universities and governmental agencies, or other entity types such as diseases and awards, select **Other Entities** from the Browse menu.

Search:

Semantic Type	# entities ▼
Organisation	2450
Place	1540
Company	603
Building	302
Government Agency	272
University	256
Periodical Literature	254
Event	101
Road	66
River	54
Legislature	53
Award	34

Fine-grained entity types, accessible through the *Other Entities* option on the browse screen.

Type: UNIVERSITY

Show **10** entries

Search:

Entity	Score	Messages
State University of New York	1	27
New York University	1	7
Columbia University	1	7
Brown University	1	6
University of Illinois at Chicago	1	6
University of Chicago	1	6
Harvard University	1	4
Princeton University	1	4
Williams College	1	4

ePADD allows users to review fine-grained entities such as universities and museums, as well as other entity types such as diseases and events.

If you are upgrading to the latest version, you can reindex the email archive in order to access these fine-grained types. To do so, select the Re-recognize Entities option under the Settings menu.

3.2.3.2 Editing Entities

Beginning in ePADD 3.0, users can now edit or merge entities in a given category from an entity browse screen, by selecting **Edit Entities.**

Type: Company

Show 10 entries

Search:

Entity	Score	Messages
Associated Press	1	22
Mary Kay	1	6
Special Olympics	1	5
College Board	1	4
Navy Federal Credit Union	1	4
Columbia Restaurant	1	4
Mayo Clinic	1	3
Prentice Hall	1	3
Texas Instruments	1	2
Tennessee Valley Authority	1	2

Showing 1 to 10 of 272 entries

[Previous](#) [Next](#)[EDIT ENTITIES](#)

Type: Company

--
Associated Press
--
Chamber of Commerce
--
U.S. Mint
--
Lincoln Motion Picture Company
--
Internal Improvement Trust Fund
--
Developmental Services
--
Mary Kay
--
Medicaid Services
--
NACC USA
--
Special Olympics
--
College Board
--
Navy Federal Credit Union
--
Circulation Customer Service
--
Baja Grill
--
Columbia Restaurant
--
Hour Sports
--
Families USA
--
Tallahassee Bureau
--
Medical Services
--
Searchwell Thorne & Associates

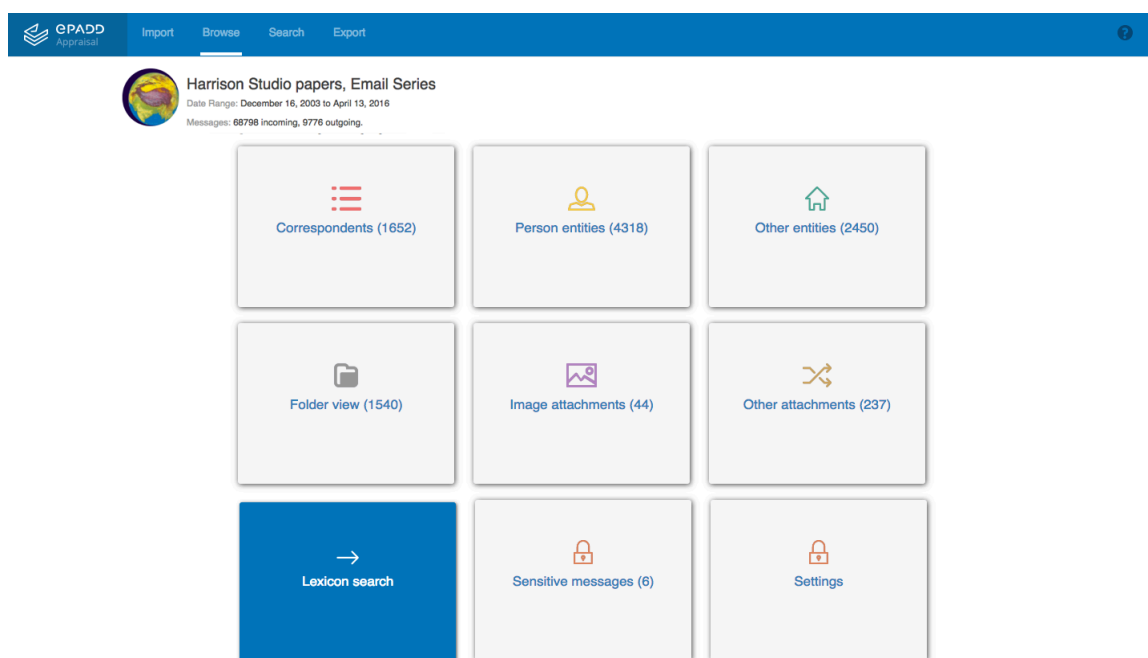
SAVE →

The user can merge entities by grouping them together using find, cut, and paste commands. Unmerge entities by separating them using find, cut, and paste commands. The first entity name listed within each group of entity names is the one ePADD will display in all search and browsing results and visualizations. Manually change this display name by moving a

new name to the top of this list. Alternatively, you can supply a new entity display name to the top of the list. This supplied entity name does not need to appear in the email archive. The user can view the individual entities that have been merged with a given entity by hovering over that entity from the **Browse Person Entities** or **Browse Other Entities** category screens.

The user can optionally create and modify a single entity kill list to suppress text strings that ePADD has identified as entities from appearing as such under any entity category. To do so, create a text file titled “kill.txt” in the ePADD-settings folder. Each line of the document should contain a single named entity. Save the file and restart ePADD. The entities you listed should be suppressed.

3.2.4 Performing Lexicon Analysis



ePADD employs lexicon analysis to search email messages for terms associated with personal or restricted information, which might indicate the need for further review. ePADD ships with several default lexicons. The “Sensitive” lexicon can be used to assist in the identification of email messages with the potential for confidential content. In release 1.1 ePADD introduced a “Sentiment” lexicon, to aid the user in performing sentiment analysis on the corpus. Beginning with release 2.0, ePADD includes a variety of additional lexicons

developed by a Lexicon Working Group feedback. Additional information about this group, and about the lexicons shared, is accessible here.

The user can make persistent changes to any lexicons, or start afresh by building a new lexicon.

The **Lexicon Search** screen is accessible under the Browse Menu screen from the Appraisal Module navigation bar.

The lexicon analysis screen has two views: Table View and Graph View, which can be toggled by selecting the appropriate button from the Lexicon screen.

[GO TO GRAPH VIEW](#) [VIEW/EDIT LEXICON](#) [+ CREATE NEW LEXICON](#)

Choose Lexicon

Sensitive

Search:

Lexicon category	Messages
Job	238
Health	164
Personal	126
Legal	89
Student	29
Personally Identifiable Information	15

Showing 1 to 6 of 6 entries

3.2.4.1 Editing a Default Lexicon

Personally Identifiable Information (Test)

"social security"lss

Job (Test)

"performance appraisal"l"performance evaluation"l"performance review"lpromotion"lannual review"lconfidentialltenurelsalarylrecommendation"lreference letter"lgrievancel-fired"llet go"lterminatedldemotionllayoff"lletter of support"l"search committee"lnominationlgrievancelharassmentlcomplaintlharasslsexual harassment"l"sex discrimination"l"gender discrimination"l"discriminationlconcealmentltoxicantldrunkl"unwarranted advances"lappoint"lpromotion and tenure"l"appointment and promotion"l"tenure appeal"l"tenure denied"l"tenure denial"l"denied tenure"l"contract renewal"lcompensationlstipendlsalarylcompensationlstipendl"background check"l"job offer"l"offer letter"

Legal (Test)

lawsuit"llegal action"l"litigation"l"lawyer"lwillljuvenilelaccusedlacuserlarraignmentlcriminalloffender"lcriminal defense"l"offenderldefendantlPerpetratorlpenaltylperjury"lsexual assault"lrapelrapistlfraudltheft"lphysically threaten"labuselassaultl"domestic violence"l"domestic abuse"l"drugslfelonylmisdemeanorl"formal charge"lbatteredlabuserlincriminatelincarcerationlinvestigationlmalpracticeInegligentlprosecutel"restraining order"lsbpoenalwarrantlracismlracistlsexistlsexismlhomophobiclhomophobicantisemitic"lanti semitic"

Student (Test)

gradel"education record"ltranscript"lstudent number"l"student id"l"expellprobation"l"academic probation"lcheatl"academic fraud"lplagiarizel"underage drinking"lunderagel"underage drink"

Health (Test)

sickillillnesslillnesslmedicallsurgerylendoscopylhospitalunwellldepressedlinjurelhurtlinjurylinjuredlinjuriousldoctorlsurgeonlsurgicallcliniclletallsuicidelacerationltraumaltraumaticlischizophrenicdisfigurelradiationlmedicinelwoundlfoetuslfetuslfetallinjureldiseaseInfectionlvomitlpukelpukinglseasickcarsicklnausealnauseouslnauseatinglnauseatedlpallidlwantlmiscarriagel"heart attack"lpostpartumlhemorrhagelfracturelcasualtylconcussionlbiopsylmalignantlmalignancylpancreaslpncreaticlgastriclabdominallthyroidlcervicallcar diovascularlcolorectalovarianlgastrointestinalllungllungsllthoracicloesophagusalzheimerparkinsonlpediatricianlorthopediclcardiologistlurologistloncol ogistlgynecologistldermatologistlneurologistlanesthesiologistlanesthetistlgeriatricl"spinal cord"l"insurance policy"lhospitalldoctorl"medical record"lprescriptionlmedicationltreatmentlsuicidel"heart bypass surgery"lmentallanorexialdrugslabortion"lmental illness"lpsychiatristldementialstdlstdlagnosislpregnantlmedslMedicarelcellliverlspleen

Personal (Test)

divorce"lpouselwifelhusbandldaughterlsonldadlmomlstepsonlstepdaughterlaffairlsexlsecretlover

+ ADD A CATEGORY

SAVE LEXICON

The default lexicons can be altered by a creator in order to better identify messages that should have access restrictions. They can also be used by a curator to search on specific topics in order to help establish the archival value of the email archive.

In order to edit the default lexicons, navigate to **View/Edit Lexicon** from the settings menu in the Appraisal Module navigation bar.

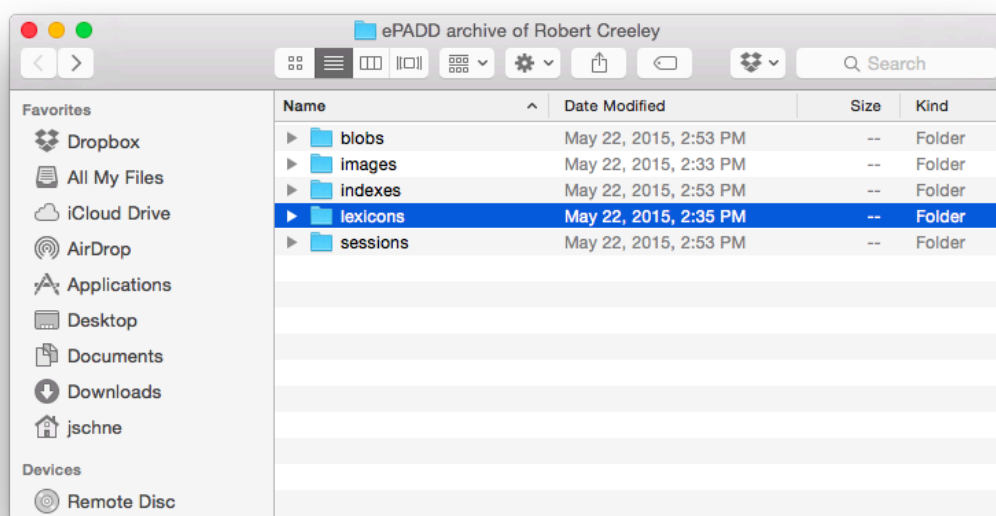
To add a category, select the *Add a category* button. To remove a category, simply remove all words in it.

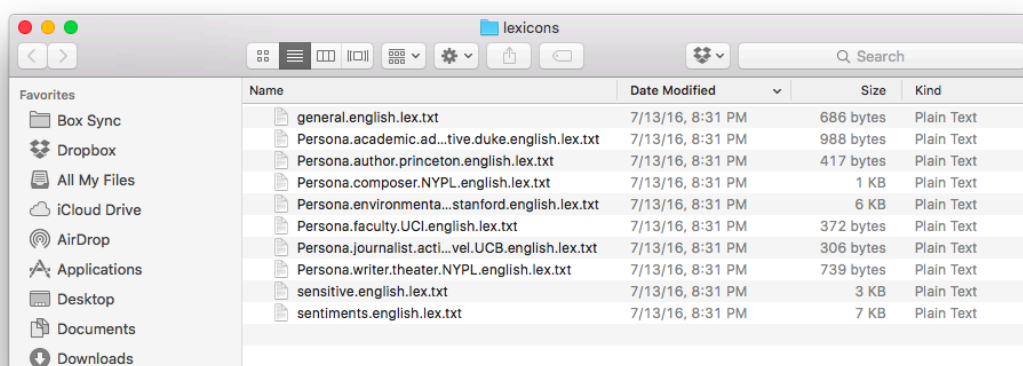
Please note: New entries in a category should be separated with the | (pipe) character. Multi-word phrases should be enclosed in double-quotes. Note that words and phrases with hyphens, such as father-in-law, should be spelled without hyphens, as a hyphen is a special character in Lucene. For more information see https://lucene.apache.org/core/2_9_4/queryparsersyntax.html#Escaping%20Special%20Characters.

When you have finished making changes, select the *Save changes* button.

Expert Tip: The lexicon can also be used to categorize email messages based on topic.

Note that each lexicon is a text file that can be modified outside of the program and saved to the email archive directory. In this way, these lexicons can be reused across collections and ePADD instances. Default lexicons may be updated in future releases.





The user can define the default lexicon in the epadd.properties file.

3.2.4.2 Reviewing Lexicon Analysis Results

Beginning with the 2.0 release, ePADD allows a user to test the results of any category (outside of the RegEx lexicon), in order to ascertain whether a particular term is too general or too specific to be helpful. Select “Test” next to the category you wish to test from the View/Edit Lexicon screen in order to make use of this feature.

Show 10 entries Search:

Term	Messages
appoint	84
recommendation	80
tenure	47
promotion	38
nomination	38
fired	37
salary	33
"search committee"	33
salary	33
stipend	22

Showing 1 to 10 of 47 entries Previous Next

Test terms contained in a lexicon category by selecting the “Test” feature from the View/Edit lexicon screen

Lexicon analysis results will by default appear on any search results screen (including both those generated by using the **Search** menu option as well as the results of implicit searches generated by clicking on the results of **Browse** menu options).

A user can also view lexicon analysis results directly by clicking category results from the Lexicon Table screen.

3.2.5 Reviewing Regular Expressions

GO TO GRAPH VIEW
VIEW/EDIT LEXICON
+ CREATE NEW LEXICON

Choose Lexicon

Regex

Search:

Lexicon category	Messages
TEST	537
U.S. social security number	6
Credit card number	2

Showing 1 to 3 of 3 entries

To further aid in identifying potentially confidential materials, ePADD searches the archive for sensitive messages by searching for regular expressions such as social security numbers, and credit card numbers. Beginning with release 4.0, regular expressions are a customizable lexicon under the Lexicon Search browse category, selected from the lexicon dropdown menu. Note that since each lexicon category contains just one regular expression, results for each category display under Lexicon Search results.

Choose Lexicon

Regex

Search:

Lexicon category	Messages
U.S. social security number	6
Credit card number	2

Showing 1 to 2 of 2 entries

3.2.6 Reviewing Attachments

ePADD allows the user to browse and review email attachments. ePADD uses the Apache Tika toolkit to recognize a wide range of document formats. A complete list of formats recognized by Apache Tika can be found [here](#).

3.2.6.1 Reviewing Image Attachments

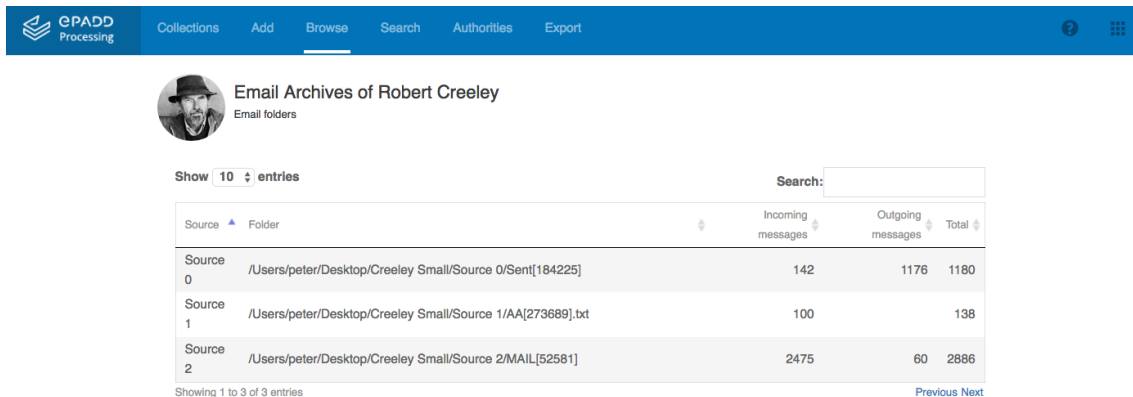
Select **Image Attachments** from the Appraisal Module menu at the top of the screen to navigate to the Image Attachments screen. ePADD uses the Cooliris Image Viewer browser plugin to display image attachments. Scroll across the screen to view additional image attachments. Selecting an image attachment will give the user the option to directly access the related message. Beginning in ePADD 3.0, the Image Attachment screen now supports limiting image results according to various search parameters.

3.2.6.2 Reviewing Other Attachments

Select **Other Attachments** from the Appraisal Module menu at the top of the screen to navigate to the Other Attachments screen. Other attachments include all non-image attachments. This screen will present a list of all non-image attachments, which can be downloaded and viewed outside of the ePADD program. Note that ePADD does not provide native support for viewing non-image attachments.

3.2.7 Browsing Email Folders

The user can navigate email messages by folder structure using the Browse Folders interface, accessible from the Browse screen.



The screenshot shows the 'Email Archives of Robert Creeley' interface. It includes a navigation bar with 'Collections', 'Add', 'Browse' (selected), 'Search', 'Authorities', and 'Export'. Below the navigation bar is a profile picture and the name 'Email Archives of Robert Creeley' with the subtitle 'Email folders'. A 'Show 10 entries' dropdown and a 'Search:' input field are present. The main content is a table with columns: Source, Folder, Incoming messages, Outgoing messages, and Total. The table lists three sources with their respective folder paths and message counts.

Source	Folder	Incoming messages	Outgoing messages	Total
Source 0	/Users/peter/Desktop/Creeley Small/Source 0/Sent[184225]	142	1176	1180
Source 1	/Users/peter/Desktop/Creeley Small/Source 1/AA[273689].txt	100		138
Source 2	/Users/peter/Desktop/Creeley Small/Source 2/MAIL[52581]	2475	60	2886

Showing 1 to 3 of 3 entries [Previous](#) [Next](#)

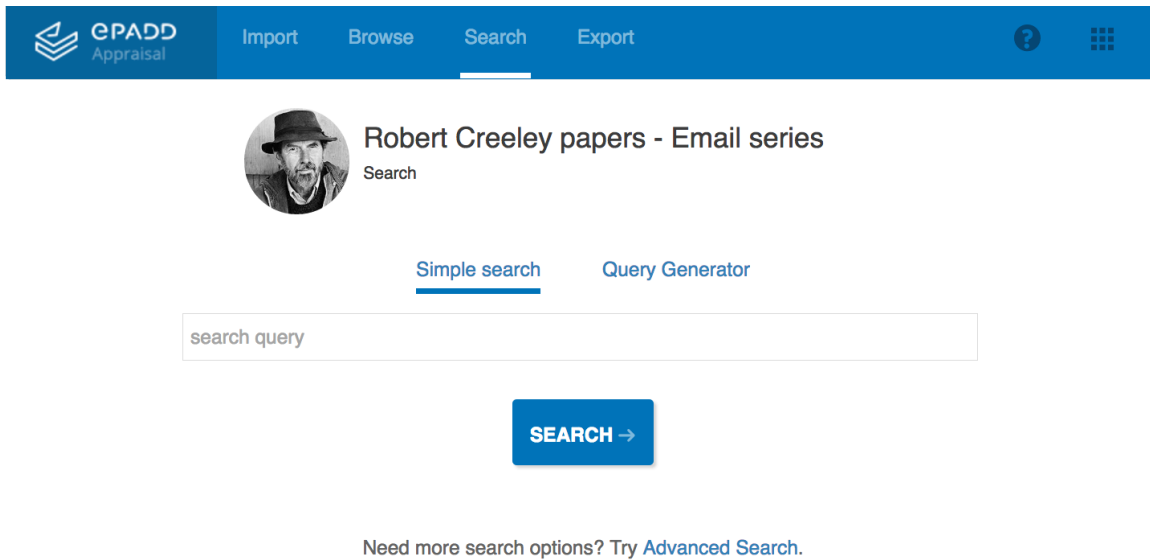
Browse Folders interface

If using Gmail, to ensure messages appear in the appropriate folder, please be sure to deselect the non-unique “All Mail” folder during ingest for email ingested via IMAP.

3.3 Appraising Email

Once you have confirmed the identity of correspondents, edited the lexicon to your satisfaction, and reviewed entities and attachments, the next step is using the information you have learned to appraise individual email messages. ePADD provides the user with a faceted search interface from which to annotate individual email messages and make appraisal decisions.

3.3.1 Searching Email Messages



The screenshot shows the ePADD Appraisal interface. At the top is a blue navigation bar with the ePADD Appraisal logo and buttons for Import, Browse, Search (which is highlighted with a white underline), and Export. To the right of the Search button are a help icon (question mark) and a grid icon. Below the navigation bar, there is a circular profile picture of a man wearing a hat, followed by the text "Robert Creeley papers - Email series" and a "Search" link. Below this, there are two tabs: "Simple search" (which is selected and underlined) and "Query Generator". Under the "Simple search" tab is a text input field with the placeholder text "search query". Below the input field is a blue button with the text "SEARCH →". At the bottom of the interface, there is a link that says "Need more search options? Try [Advanced Search](#)."

To search the email archive, navigate to the Search screen from the Appraisal Module Menu.

Beginning with v2.0, ePADD supports three types of search: simple search, advanced search, and the query generator.

To use the simple search feature, simply type in your query into the simple search box available on the initial search screen. This will search across message headers (correspondents and subjects) and message text, as well as the text of all document attachments.

Once you have entered your term(s) and made your selection, click the *Search* button. The search string will appear highlighted on the search results screen.

Advanced Search enables the user to generate complex searches of email text, correspondents, attachments, and any actions previously taken on the messages, as well as a variety of other parameters.

Advanced Search

Text

Terms

☒ Search body ☒ Search subject ☒ Search attachments ☒ Search original text

Entity

Correspondents

Name or email

☒ To ☒ From ☒ Cc ☒ Bcc

Mailing List

☐ Yes ☐ No ☒ Either

Attachments

File Name

File Size

☐ Reg Ex

Type

Other extension

Actions

Annotation

Reviewed

☐ Yes ☐ No ☒ Either

Restricted

☐ Yes ☐ No ☒ Either

Not transferred

☐ Yes ☐ No ☒ Either

Miscellaneous

Time Range: To

Message Direction: ☐ Incoming ☐ Outgoing ☒ Either

Email Source:

Message Folder:

Lexicons:

Lexicon Category:

Entity type:

Sort results by:

SEARCH [Clear form](#)

Search Tips can be accessed by selecting the  button in the top right corner of the *Advanced Search* screen.

ePADD also allows a user to search the email archive for entities contained in a given block of provided text, using the *Query Generator*. Any matching terms will be highlighted on the results page.

3.3.1.1 *Navigating Search Results*

Upon submitting a search query, ePADD opens a new browser window displaying the **Search Results** screen.

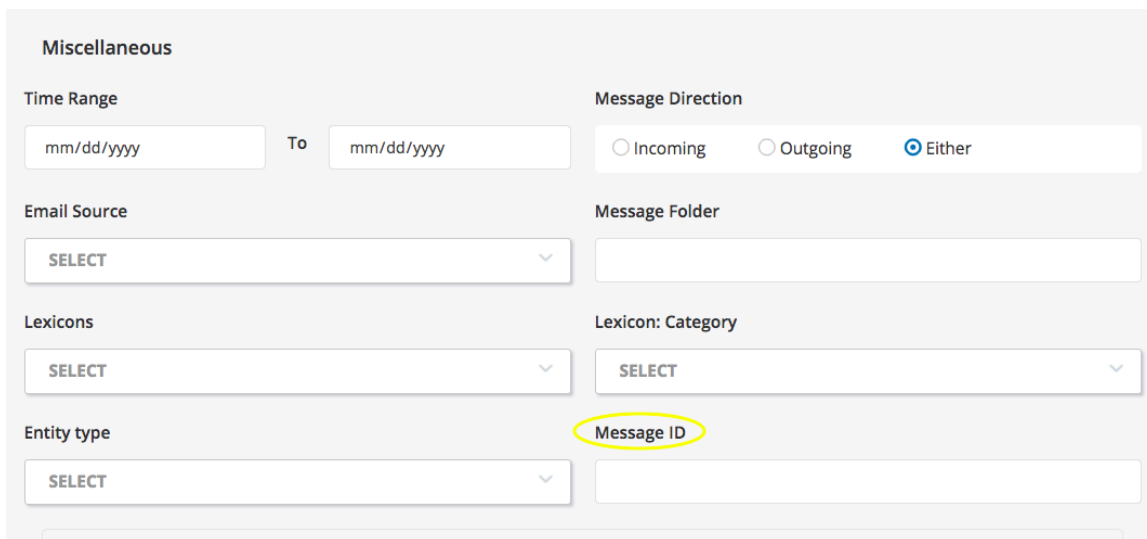
The Search Results screen displays the full text of email messages as well as a faceted browser which allows the user to further limit the search results. The total number of messages resulting from your search appears above the email message display. The current message appears as a fraction of that display. For instance, if you are appraising message 1 out of 400 results, the display would read 1/400. The forwards and back arrows to the left and right of that number allow you to navigate between search results.

Search results can be limited by correspondent, email direction (incoming or outgoing), lexicon category (if relevant), attachment type (if relevant), annotations or the originating mail folder. To limit the results by a particular facet, simply click the term from the left-hand panel.

All messages have been assigned a unique ID, viewable from this page.

ID: c0f436440c2a4ad1061cd08df1d689609e801682a3ec864839288209c1b625d5

If you ever wish to return to a particular message, you can search for a message ID (or semi-colon delimited set of message IDs) using the advanced search interface in the Miscellaneous search category.



Miscellaneous

Time Range: To

Message Direction: ☐ Incoming ☐ Outgoing ☒ Either

Email Source:

Message Folder:

Lexicons:

Lexicon: Category:

Entity type:

Message ID

3.3.2 Annotating Email Messages

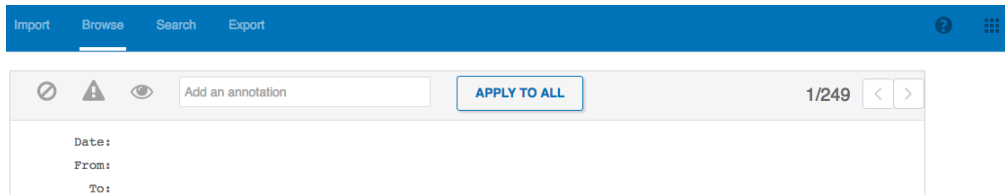
ePADD allows the user to annotate email messages from the Search Results screen. These annotations are persistent across ePADD sessions, and can be used to provide supplemental information to assist the archivist in processing the collection, including elaborating on access restrictions or to provide additional information for the benefit of researchers.

To annotate an email message, click in the annotation box (labeled *Add an Annotation*) in the top right corner. The annotation box can be resized by dragging the bottom right corner of the box. Once you have added an annotation, a new faceted browse section, Annotations, will appear in results on the Search Results screen.

If a message has already been assigned an annotation, the user can decide to either append an additional annotation to the existing annotation, or to overwrite the existing annotation. If an annotation already exists for the message being browsed, a pop-up menu will provide the user with the option to either append or overwrite the annotation. Please be aware that there is no way to undo this Overwrite action.

Annotations can added, appended, or overwritten to all of the messages currently being browsed by selecting the *Apply to All* button. If an annotation already exists for any of the messages being browsed, a pop-up menu will provide the user with the option to either

append or overwrite the annotation. Please be aware that there is no way to undo this Overwrite action.



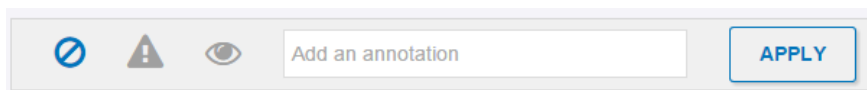
The Search Results screen provides the ability for the user to annotate messages and assign access restrictions.

3.3.3 Restricting Email Messages

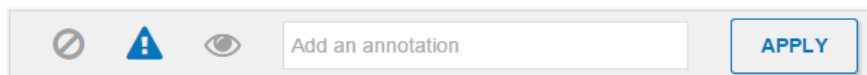
ePADD allows the user to flag email messages that should not be exported for transfer to an archival repository, as well as messages that should be transferred with restrictions.

To flag a message, select one of the icons above the message. The *Do Not Transfer* flag indicates the message should not be transferred. The *Restrict* flag indicates the message should be transferred but access to the message should be restricted.

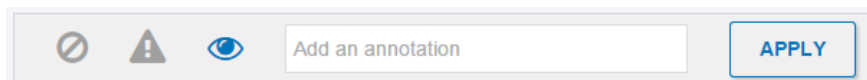
The *Reviewed* flag indicates the message being browsed has been reviewed, and can be used to help track one's progress in reviewing the email archive.



Selecting the Do Not Transfer flag lets ePADD know a message should not be transferred



Selecting the Restrict flag lets ePADD know a message should be transferred with restriction



Selecting the Reviewed flag lets a user track their progress in reviewing the email archive

All of the above actions can be applied to all of the messages currently being browsed by first selecting the action to be performed and then selecting the "Apply to All" button.

3.3.3.1 Imposing Bulk Restrictions / Do Not Transfer from a particular correspondent

ePADD also gives the user the ability to assign actions or annotations to all messages from a list of correspondents, using the *Bulk Apply Flags* option. This option can be accessed from the **Options** menu. Create a CSV file with a single column containing email addresses. Navigate and select this file from the **Bulk Apply Flags** screen.



Robert Creeley papers - Email series
Apply flags to multiple messages

CSV File

BROWSE

SUBMIT →



Robert Creeley papers - Email series
Apply flags to multiple messages

Checking 11 email address(es). 249 messages matched

⛔ ⚠️ 👁

Annotation

APPLY TO ALL

Once the file has been processed, optionally select an action and/or add an annotation, then select *Apply to All*.

3.3.4 Assigning Images to the Collection

Note: This step can be performed within either the Appraisal or Processing modules.

ePADD allows to user to assign three images to any given collection to improve the end-user experience (profile image, banner image and landing page image). To access the interface for adding these images, select the Settings Menu from the Browse screen, and select the option to **Set Images**. Images must be resized to the dimensions indicated to display correctly.

 Import

You can upload images that represent the archive here. Only PNG format files are currently supported.

Profile Photo: (Aspect ratio 1:1)



No file chosen

Landing Page Photo: (Aspect ratio 4:3)



No file chosen

Banner Image: (Aspect ratio 2.5:1)



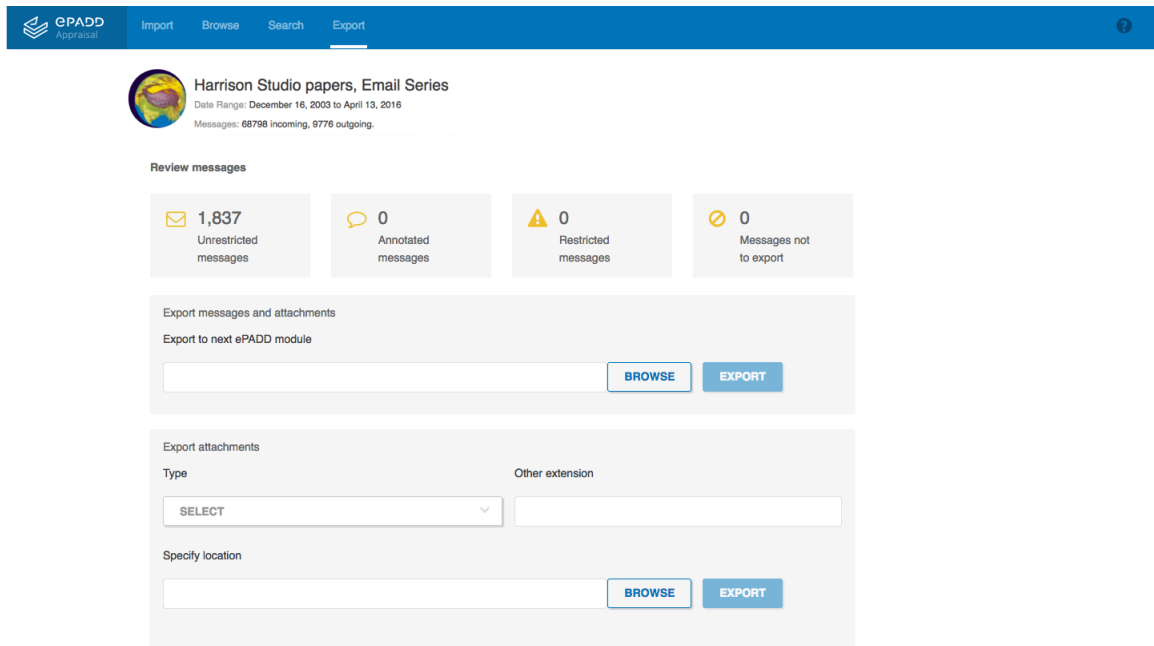
No file chosen

→

3.4 Exporting Message Attachments

Users can also choose to export attachments according to various search criteria from this Exports screen. Beginning in release 4.0, the user can indicate whether they would like to export only those attachments which have not been recognized by Apache Tika (and are therefore not indexed with ePADD), for further review. Note that messages are only flagged in this way if they have also been appraised or processed by ePADD 4.0 or later.

3.5 Exporting Email to the Processing Module



The screenshot shows the ePADD Appraisal Module interface. At the top is a blue navigation bar with the ePADD logo and tabs for Import, Browse, Search, and Export. Below the navigation bar, the main content area displays the title "Harrison Studio papers, Email Series" and a date range of "December 16, 2003 to April 13, 2016". It also shows message counts: "68798 incoming, 9776 outgoing".

Under the heading "Review messages", there are four summary boxes:

- Unrestricted messages:** 1,837
- Annotated messages:** 0
- Restricted messages:** 0
- Messages not to export:** 0

Below these boxes, there are two main sections for exporting:

Export messages and attachments: This section has a label "Export to next ePADD module" and a text input field. To the right of the input field are two buttons: "BROWSE" and "EXPORT".

Export attachments: This section has a "Type" dropdown menu with "SELECT" as the current selection. To the right of the dropdown is a label "Other extension" and a text input field. Below these is a "Specify location" label and another text input field. To the right of the location input field are two buttons: "BROWSE" and "EXPORT".

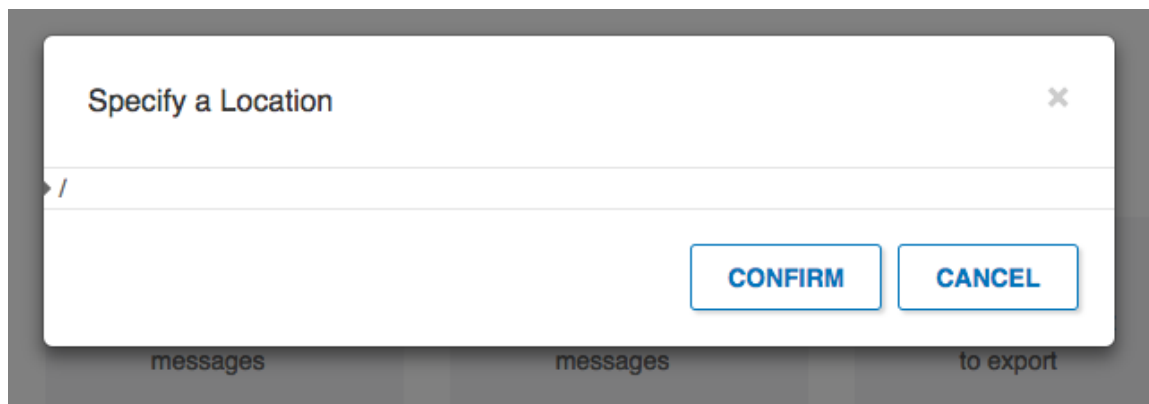
Once you have reviewed the email archive using the tools described above, the final step is to export the appraised email archive (along with whatever supplemental information or annotations you have added) so it can be transferred to an archival repository, and/or processed in another ePADD module.

Select **Export** from the Appraisal Module menu at the top of the screen to navigate to the Export Screen.

Based on your appraisal of the email archive, ePADD has segmented the email messages into four categories: **Unrestricted Messages**, **Annotated Messages**, **Restricted Messages**, and **Messages not to Export**.

From the Export screen, you can browse and search messages that have been assigned to a given category. Within that category, you can navigate to a specific message by clicking on it, if for example, you would like to review an appraisal decision you have made.

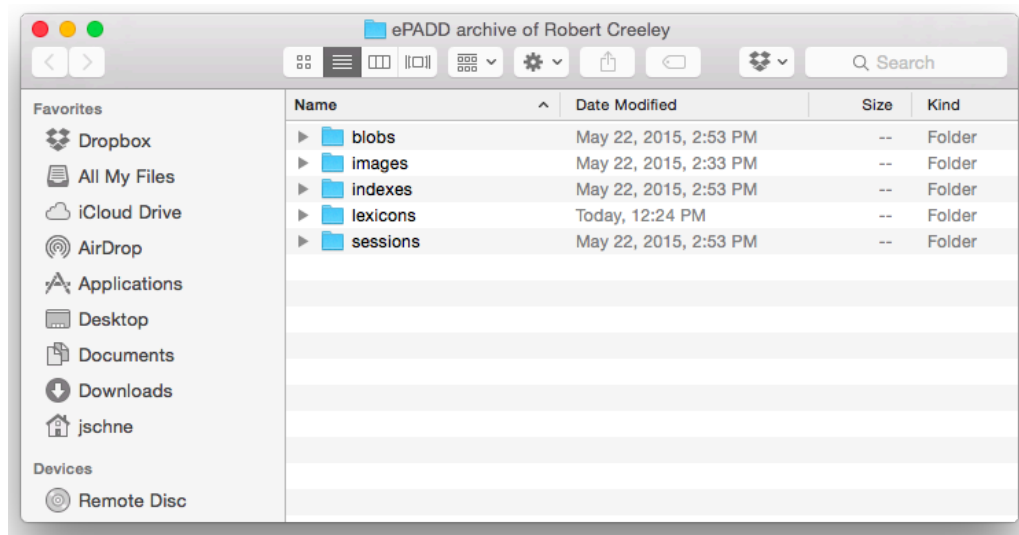
To export the archive to the Processing Module, first select Browse under *Export to Next Module*.



Selecting a folder location to export the appraised email archive

Select the location for ePADD to export the email archive. Please ensure you have enough disk space to save the complete email archive export or the export will fail.

This step may take some time as ePADD assembles the exported email archive and accompanying documentation.



An exported email archive

Note to Donor: Once you have confirmed with the archival repository that the transfer is successful, you may wish to delete the ePADD working directories from your workstation. You can do so manually by deleting the following folders under your user directory: “epadd-appraisal” and “epadd-settings.”

Note to Archivist: Once you have confirmed that the archive imports successfully into the Processing Module, you may wish to delete the archive from your workstation to ensure a fresh start when appraising a new email archive. You can do so from within ePADD on the workstation used for Appraisal by navigating to the Option Menu, under Settings, selecting the “Delete Archive” button, and refreshing your browser. After the email archive has been exported, you may wish to run a virus scan and remove any quarantined viruses on the workstation used to accession materials as additional precaution. (ePADD does not itself include a virus scan).

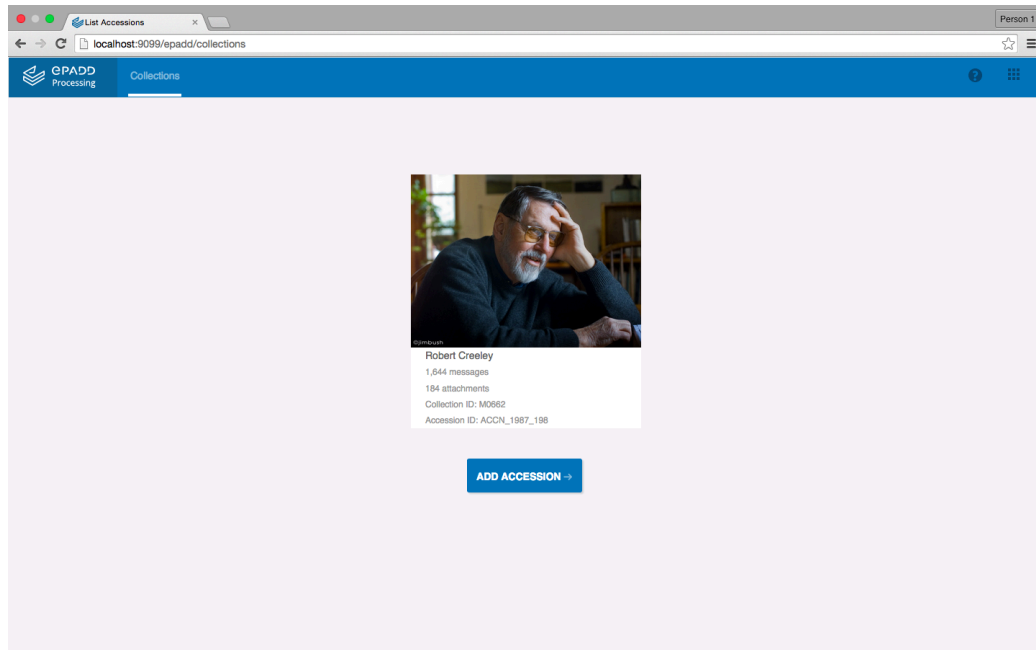
Users can also choose to only export attachments according to various search criteria from this Exports screen.

4 Processing Module



Email archives can either be added from the **Appraisal** module using the Add header menu option, or directly imported into the **Processing** module using the Import header menu option. Note that if this is your first time ingesting a collection using ePADD, you will need to first change the default module using the epadd.properties file (see section 2.2 in this guide for more details on configuring ePADD).

Please note that if you wish to export an unprocessed MBOX files for preservation, this should be your first step upon starting up the Processing Module. Select Export from the navigation bar, then use the Export messages and attachments option. Note: This MBOX file includes all messages, even those marked “Restrict” or “Do Not Transfer.”



Robert Creeley papers



Collection Details

Institution
Stanford University

Repository
Special Collections &
University Archives

Collection ID
M0662

Accession ID
ACCN 2005-182

Date Range
1995-03-05 to 2005-03-23
8 messages undated

Messages: 1,680
Incoming: 868
Outgoing: 15

Attachments: 245
Images: 34
Documents: 84
Others: 127

Contact email
specialcollections@stanford.edu

About Robert Creeley

The Robert Creeley Papers document the life work of a leading American poet of the 20th century, one of the core members of the "Black Mountain School." They also document several important movements in American poetics in the second half of the century. The papers include Creeley's personal and professional correspondence, journals, business records, personal mementos, clippings, artwork, and other documents generated and collected by him from 1950 to 1997.

Rights and Conditions

Property rights reside with the repository. Literary rights reside with the creators of the documents or their heirs. To obtain permission to publish or reproduce, please contact the Public Services Librarian of the Dept. of Special Collections.

Notes

Additional Creeley materials can be found in M0553 and M0347.

ENTER →

[Finding Aid](#)

[Catalog Record](#)

Email messages in the ePADD Discovery Module have been redacted to ensure the privacy of donors and other correspondents. Please contact the host repository if you would like to request access to full messages, including any attachments.

4.1 Importing an Email Archive from the Appraisal Module into the Processing Module

Please note that it is always best practice to fully quit ePADD before beginning work in another module.

In order to work with the email archive in the Processing Module, first select the Processing Module under the Settings menu (See **Section 2.4: Selecting a Module**).

Within the Processing Module, select “Add,” then use the “Browse” button to navigate to the folder exported from the Appraisal Module. Import the email archive identified by clicking the “Import Accession” button.



At this point, you may wish to reset the “reviewed” status for all messages that may have been marked as “reviewed” in the Appraisal Module. To do this, navigate to the Settings Menu under Options, and select the “Set Default Actions” button.

4.2 Importing an Email Archive Directly into the Processing Module

Email Archives can be directly imported into the **Processing** module using the Import header menu option. Note that if this is your first time ingesting a collection using ePADD, you will need to first change the default module using the epadd.properties file (see section 2.2 in this guide for more details on configuring ePADD).

4.3 Assigning Collection Metadata

Collection details can be viewed from the Collection page (accessed by selecting the Collections option from the navigation bar), as well as from an individual collection page.

Collection metadata can be edited by selecting the **Edit** button under Collection Info.



Robert Creeley papers - Email series

Accession metadata

Institution Stanford University	Repository Special Collections & University Archives
Collection Title Robert Creeley papers	Collection ID M0662
Accession ID ACCN 2005-182	Finding Aid Link http://www.oac.cdlib.org/findaid/ark:/13030/tf7b69n
Catalog Record Link https://searchworks.stanford.edu/view/4084039	Contact Email Address specialcollections@stanford.edu
About The Robert Creeley Papers document the life work of a leading American poet of the 20th century, one of the core members of the "Black Mountain School." They also document several important movements in American poetics in the second half of the century. The papers include Creeley's personal and professional correspondence, journals, business records, personal mementos, clippings, artwork, and other documents generated and collected by him from 1950 to 1997.	Rights and Conditions Property rights reside with the repository. Literary rights reside with the creators of the documents or their heirs. To obtain permission to publish or reproduce, please contact the Public Services Librarian of the Dept. of Special Collections.
Notes Additional Creeley materials can be found in M0553 and M0347.	
SAVE	

ePADD v2.0 has introduced two new free text fields to the accession metadata interface in the Processing Module: Rights and Conditions, and Notes.

4.4 Appraisal Revisited

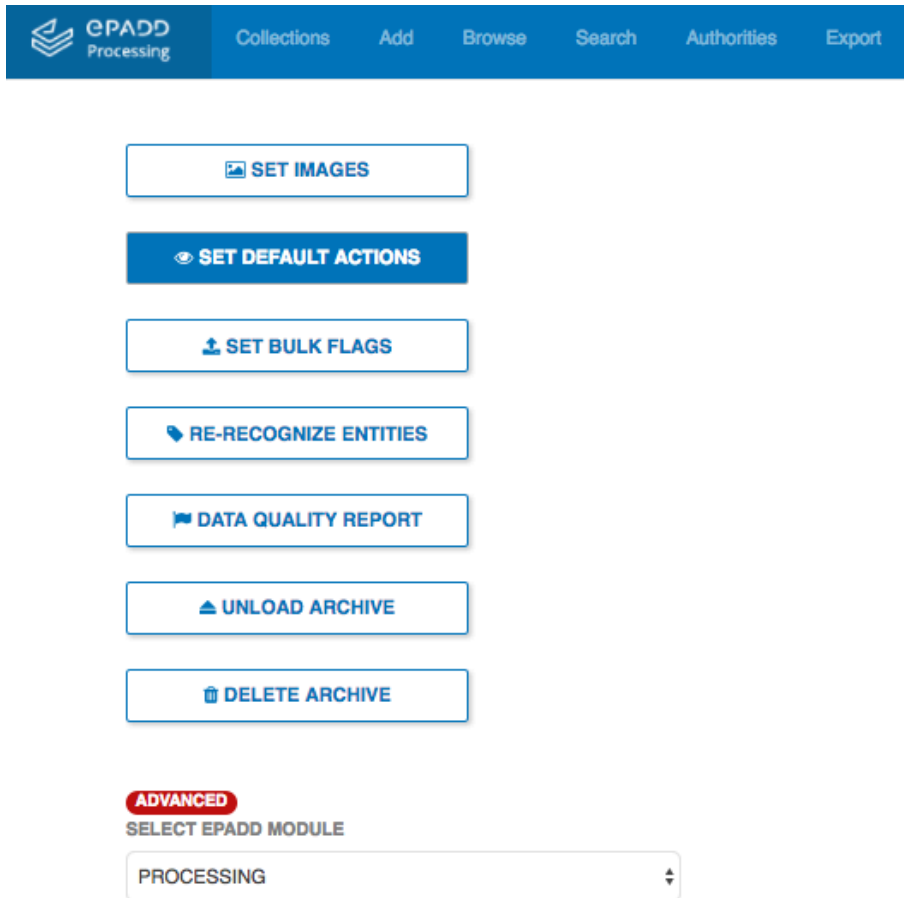
The **Processing Module** includes all of the review and appraisal functionality of the **Appraisal Module**, as well as additional functionality associated with archival processing. Please refer to **Section 3: Appraisal Module** for information on Reviewing Email (Browsing Email Messages; Editing Correspondents; Performing Entity Analysis, Performing Lexicon

Analysis; and Reviewing Attachments) as well as Appraising Email (Searching Email Messages; Annotating Email Messages; and Restricting Email Messages).

There is no set order to performing the steps above. In fact, different email archives will benefit from different approaches.

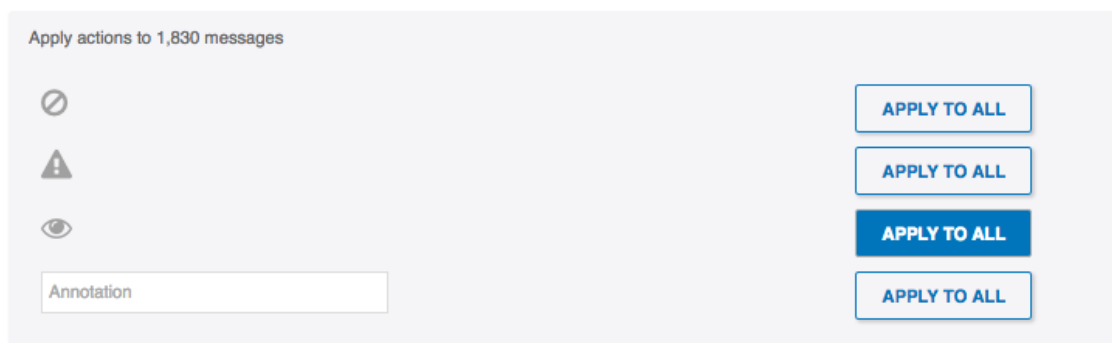
The various unique functionalities provided by the **Processing Module** to assist with archival processing are described below.

4.5 Setting Default Actions



The screenshot shows the EPADD Processing interface. At the top is a blue navigation bar with the EPADD Processing logo and several menu items: Collections, Add, Browse, Search, Authorities, and Export. Below the navigation bar is a vertical list of buttons: SET IMAGES, SET DEFAULT ACTIONS (highlighted in blue), SET BULK FLAGS, RE-RECOGNIZE ENTITIES, DATA QUALITY REPORT, UNLOAD ARCHIVE, and DELETE ARCHIVE. Below these buttons is a red 'ADVANCED' label, followed by the text 'SELECT EPADD MODULE'. Underneath is a dropdown menu currently showing 'PROCESSING'.

Use the “Set Default Actions” button to reset the “Reviewed” action flag for all messages in the email archive



4.6 Performing Authority Control

ePADD allows the user to reconcile correspondents and named entities extracted by ePADD with authorized headings (including OCLC FAST headings).

Within the **Processing Module**, select **Authorities** from the navigation bar to begin this process.

4.6.1 Reconciling Correspondents with Authorized Headings

For more information about how ePADD merges correspondents, as well as how to manually override merged correspondents, please see **3.2.2 Editing Correspondents**.

The order of correspondents on the Authorities screen can be relisted alphabetically by person, or by volume of messages exchanged. You can also select how many correspondent entries to view per page using the option box in the top left corner, as well as search for a particular correspondent using the search box at the top of the page.


Collections Add Browse Search **Authorities** Export

Show unconfirmed rows with can

Show 10 entries
Search:

Name	Messages	Authorities
Gov. Jeb/Miss Betty	3257	☐ Bush, Jeb ☒ FAST ☒ VIAF ☒ Wikipedia: Jeb_Bush ☒ LCNAF
		☐ No authority record
		☒ Assign an authority
		☒ Moore, Tim ☒ FAST ☒ VIAF ☒ LCNAF
		☒ Moore, Tim ☒ FAST ☒ VIAF ☒ Wikipedia: Tim_Moore_(comedian) ☒ LCNAF

ePADD searches OCLC FAST for LC Subject Headings, as well as DBPedia, VIAF, and LCNAF. If an image is associated with the related DBPedia record, it can be displayed by hovering over the related DBPedia link.

If you are unsatisfied with ePADD's results, you can add an authorized heading ID or local ID using the + button.

Assign authority record for Gov. Jeb/Miss Betty

FAST Id

e.g., 61561

VIAF Id

e.g., 66552944

Wikipedia Id

e.g., Thomas_Edison

LoC Named Authority File Id

e.g., n80126308

LoC Subject Headings Id

e.g., sh95009459

Local Id

CANCEL

SAVE

Any actions taken in the Authorities interface are autosaved. Authorized correspondents can be exported as a .CSV file by selecting **Export** from the navigation bar, then using the *Export authorities (CSV)* option.

4.7 Exporting Message Headers

Message headers can be exported from the Processing module as a .CSV file to aid in social network analysis, by selecting **Export** from the navigation bar, then using the *Export Headers (CSV)* option.

Exported fields include Date, From (resolved name), from (email address), To (resolved name), To (email address), CC (resolved name), CC (email address), BCC (resolved name), BCC (email address).

4.8 Exporting Message Attachments

Users can also choose to export attachments according to various search criteria from this Exports screen. Beginning in release 4.0, the user can indicate whether they would like to export only those attachments which have not been recognized by Apache Tika (and are therefore not indexed with ePADD), for further review. Note that messages are only flagged in this way if they have also been appraised or processed by ePADD 4.0 or later.

4.9 Exporting to MBOX

Users can export all messages, including message that are not marked “Do not Transfer,” to MBOX, by selecting Export from the navigation bar, then using the Export messages and attachments option. **Note: This action should take place before any processing has been performed.**

4.10 Exporting Email to the Delivery and Discovery Modules

Once you have reviewed the email archive using the tools described above, the final step is to export the processed email archive (along with whatever supplemental information or annotations you have added) for display in the Discovery and/or Delivery Modules.

Select **Export** from the Processing Module menu at the top of the screen to navigate to the Export Screen.


ePADD
Appraisal

[Import](#)
[Browse](#)
[Search](#)
[Export](#)

?


Harrison Studio papers, Email Series
Date Range: December 16, 2003 to April 13, 2016
Messages: 68798 incoming, 9776 outgoing

Review messages


1,837
Unrestricted messages


0
Annotated messages


0
Restricted messages


0
Messages not to export

Export messages and attachments
Export to next ePADD module

BROWSE

EXPORT

Export attachments

Type

Other extension

SELECT

Specify location

BROWSE

EXPORT

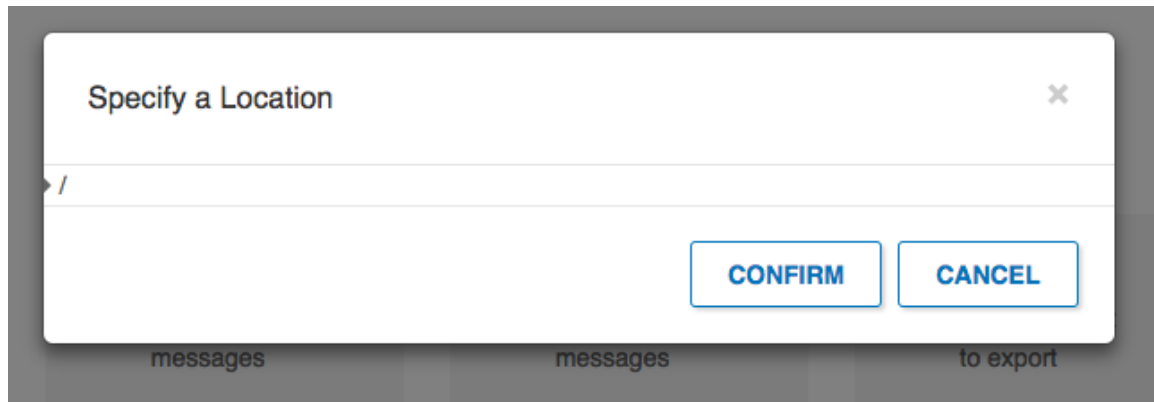
Based on your processing of the email archive, ePADD has segmented the email messages into four categories: **Messages to Deliver, Messages not to Deliver, and Restricted messages**. The default view is **Messages to Deliver**.

Based on your appraisal of the email archive, ePADD has segmented the email messages into four categories: **Unrestricted Messages, Annotated Messages, Restricted Messages, and Messages not to Export**.

From the Export screen, you can browse and search messages that have been assigned to a given category. Within that category, you can navigate to a specific message by clicking on it, if for example, you would like to review a processing decision you have made.

To export the archive to the Processing Module, first select Browse under *Export to Next Module*.

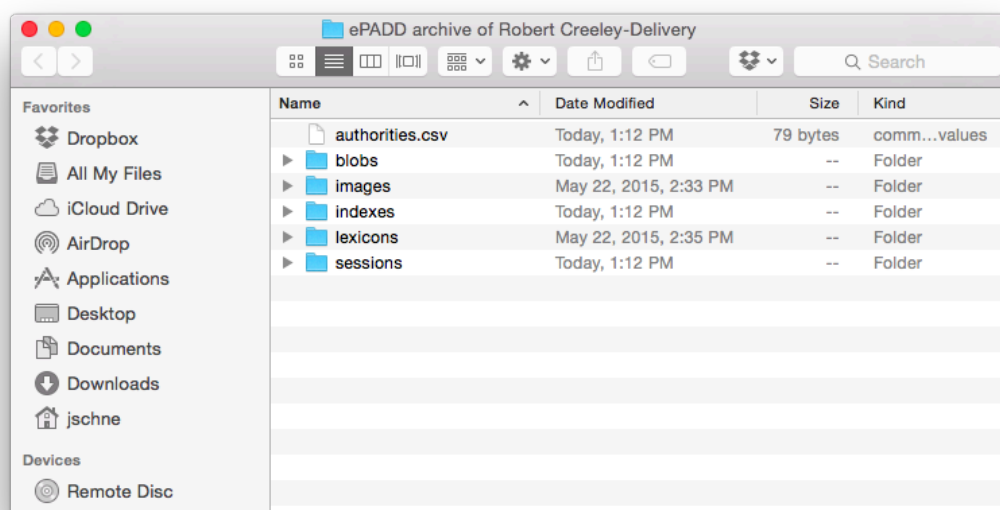
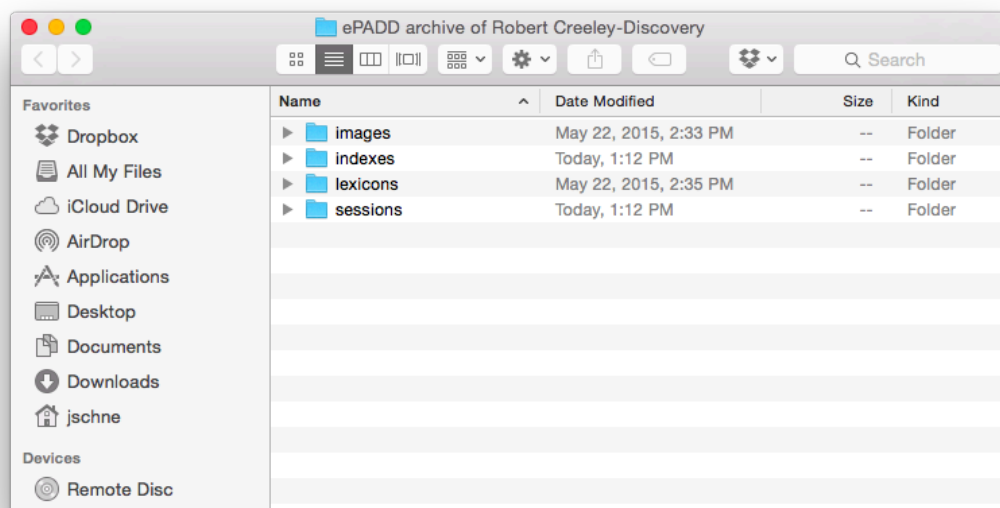
To proceed with the Export, click the *Export* button from the **Messages to Transfer** screen.



Select a folder in which to export the email archive

Select the location for ePADD to export the email archive. Please ensure you have enough disk space to save the complete email archive export or the export will fail.

This step may take some time as ePADD assembles the exported email archive and accompanying documentation.



Exporting the processed email archive from the Processing Module creates two folders: one to support discovery, and one to support delivery

ePADD v2.0 enables users to also export email from Appraisal and Processing directly to an MBOX file. Please note that email exporting to MBOX will need to be reimported into ePADD (and reindexed) in order to benefit from ePADD's functionality in the future. To export to an MBOX file, select *Export Archive to MBOX* under *Options> Settings*.

5 Discovery Module



Discovery Module Navigation Bar

The Discovery Module is designed to run under a web-server, and allow remote users to search redacted header info and extracted entities while limiting full-text access to the materials.

5.1 Testing the Discovery Module

To test the Discovery module on your local workstation, copy the folder “Email archive of <name>-Discovery,” exported through the Processing Module to the “epadd-discovery” folder in your user directory. (Please see **Section 2: Getting Started** for more information about locating your user directory). If an “epadd-discovery” folder does not already exist within your user directory, create that folder.

Now run ePADD and navigate to the Discovery module within the settings folder. At this point, you may wish to reset the “reviewed” status for all messages that may have been marked as “reviewed” in the Processing Module. To do this, navigate to the Settings Menu, and select the “Set Default Actions” button (see 4.5: *Setting Default Actions* for more information about this step).

5.2 Mounting the Discovery Module under a Web Server

Please follow the steps below to mount the ePADD Discovery Module under a web server. As the software is still in development, please contact us (epadd_project@stanford.edu) to troubleshoot any issues and/or confirm your successful installation.

1) Install the **Java runtime environment** (JRE 8+) on the machine that is going to mount the web server.

2) Download and unzip **epadd-settings.zip** into the home directory of the account that is going to mount the web server. You should see the following directories, subdirectories, and files:

```
$ ls ~/epadd-settings/
```

dictionaries

instance_types_2014-04.en.txt.bz2

models

SeqModel.ser.gz3

3) Copy the exported Discovery version of the archive folders (which should be titled *ePADD archive of <name>-Discovery*) into ~/epadd-discovery of the home directory for the account that will be running the ePADD discovery module / web server.

Upon copying the files you should see the following directories, including subdirectories and files:

```
$ ls ~/epadd-discovery
```

ePADD archive of <name>-Discovery

Important: Please ensure that you do not copy the Delivery version of the archive. It MUST be the Discovery version, as the Delivery version has unredacted information.

4) Download and install the Discovery Module distribution file (**epadd-discovery-standalone.jar**). The web server is bundled with this distribution.

5) Start ePADD with:

```
java -Djava.io.tmpdir=/opt/app/sulmuse/tmp -Depadd.mode.discovery=1  
-Dnobrowseropen=-Xmx2g -jar epadd-discovery-standalone.jar -no-browser-open
```

Please adjust the -Xmx option to assign as much memory you want, depending on the size of the archive(s)).

The java.io.tmpdir should be set to a directory where temporary files can be stored by ePADD.

Caution: Please ensure that this directory is not periodically cleared by utilities like tmpwatch.

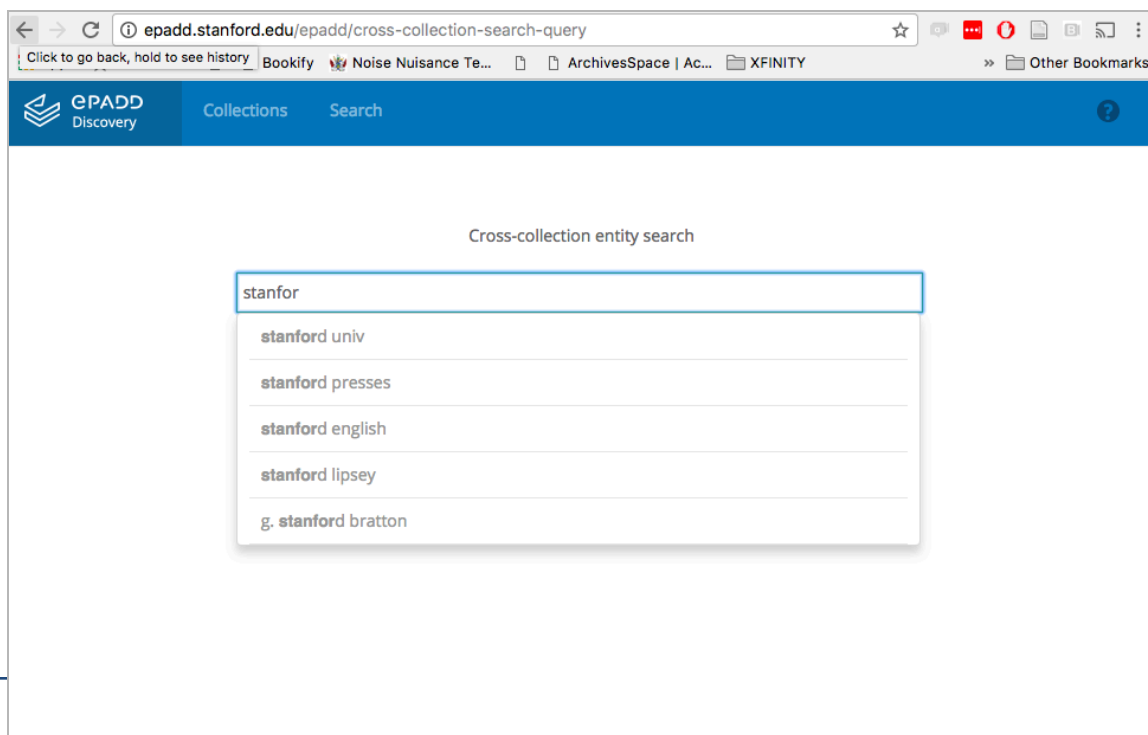
6) You may wish to reset the “reviewed” status for all messages that may have been marked as “reviewed” in the Processing Module. To do this, navigate to the Settings Menu, and select the “Set Default Actions” button (see 4.5: *Setting Default Actions* for more information about this step).

Note:

Please contact the ePADD development team (epadd_project@stanford.edu) for help troubleshooting installation of the Discovery Module.

5.3 Searching Entities Across Collections

Beginning with release 4.0, ePADD supports cross-collection entity search. Navigate to Search from the Discovery navigation bar to access cross-collection entity search.




[Collections](#)
[Search](#)

Search term: stanford university press

Institution: [Stanford University Libraries](#) Repository: [Manuscripts](#) Collection: [Robert Creeley papers](#)

Entity	Messages	Correspondent	Date Range
Stanford University Press	24		Jun 12, 2003 - Nov 22, 2004

Institution: [Stanford University Libraries](#) Repository: [Manuscript](#) Collection: [Harrison \(Helen and Newton\) papers](#)

Entity	Messages	Correspondent	Date Range
Stanford University Press	3		Oct 02, 2010 - Feb 15, 2011

Cross-collection entity search support autocomplete. The user can navigate from search results to the related collection.

5.4 Navigating to a Collection

The Collections menu provides a user with access to the redacted email of any processed collections.

The user selects the collection they wish to access by clicking on the related image.

Welcome to ePADD.

ePADD is a platform that allows researchers to browse and search historical email archives.

Messages have been redacted to ensure the privacy of donors and other correspondents. Please contact the host repository if you would like to request access to full messages, including any attachments.



Robert Creeley

49,929 messages

10,573 attachments

Collection ID: M0662

Accession ID: MSS.2005-341



Harrison Studio

78,574 messages

25,314 attachments

Collection ID: M1797

Accession ID: MSS 2016-053/054

Selecting a Collection

The next screen provides basic details of the collection. A user can proceed with viewing the collection by selecting the “Enter” button.

Robert Creeley papers



Collection Details

Institution
Stanford University

Repository
Special Collections & University
Archives

Collection ID
M0662

Accession ID
ACCN 2005-182

Date Range
1995-03-05 to 2005-03-23
8 messages undated

Messages: 1,680
Incoming: 868
Outgoing: 15

Attachments: 245
Images: 34
Documents: 84
Others: 127

Contact email
specialcollections@stanford.edu

About Robert Creeley

The Robert Creeley Papers document the life work of a leading American poet of the 20th century, one of the core members of the "Black Mountain School." They also document several important movements in American poetics in the second half of the century. The papers include Creeley's personal and professional correspondence, journals, business records, personal mementos, clippings, artwork, and other documents generated and collected by him from 1950 to 1997.

Rights and Conditions

Property rights reside with the repository. Literary rights reside with the creators of the documents or their heirs. To obtain permission to publish or reproduce, please contact the Public Services Librarian of the Dept. of Special Collections.

Notes

Additional Creeley materials can be found in M0553 and M0347.

ENTER →

Finding Aid

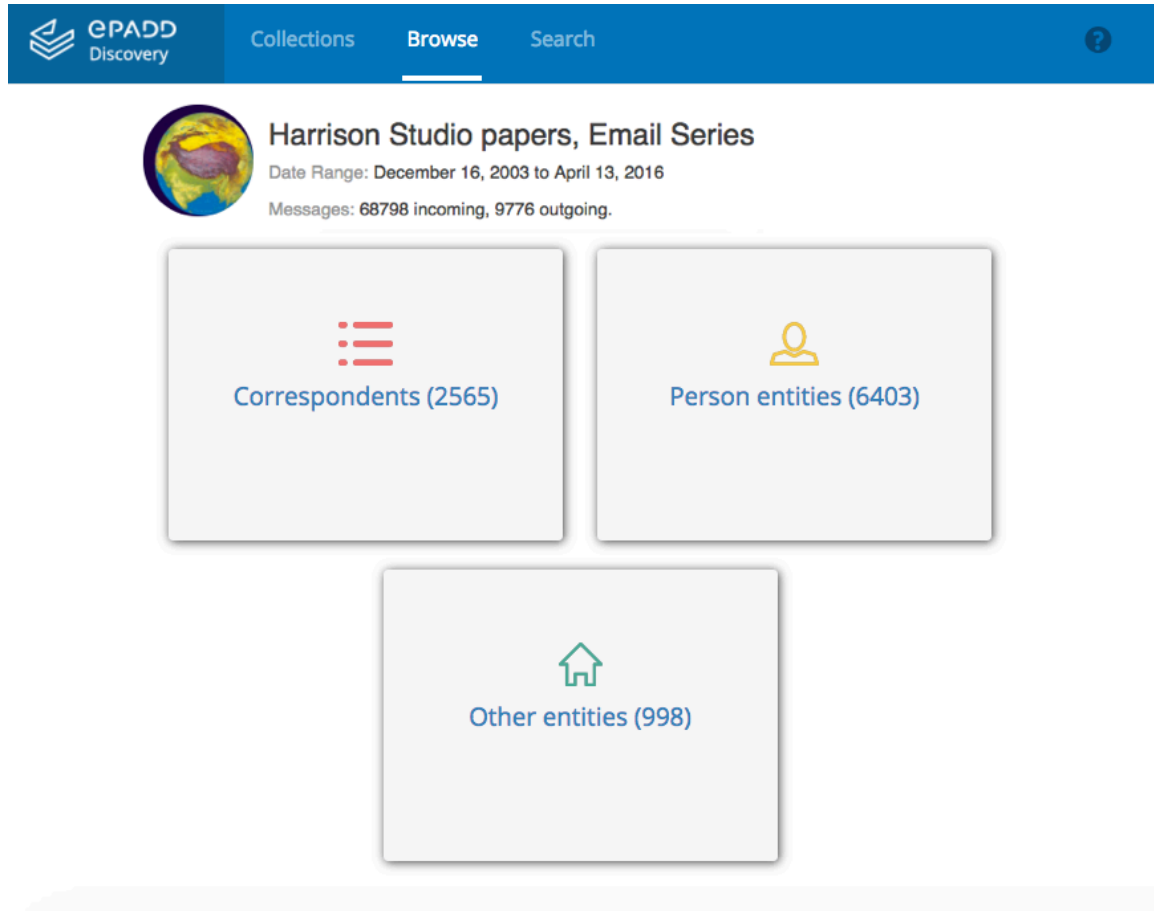
Catalog Record

Email messages in the ePADD Discovery Module have been redacted to ensure the privacy of donors and other correspondents. Please contact the host repository if you would like to request access to full messages, including any attachments.

Access a Collection by clicking the "ENTER" button.

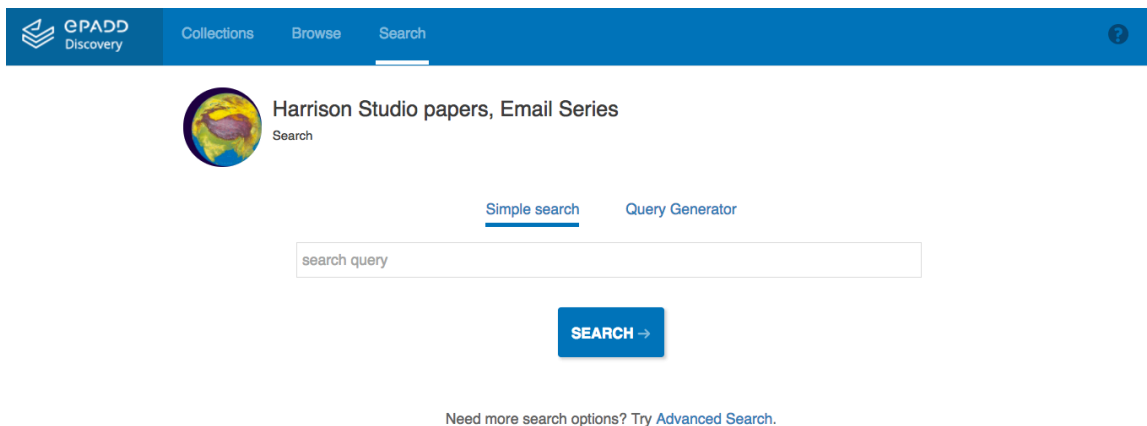
5.5 Browsing Email

The Browse Menu provides a user with access to several options to browse a redacted email archive, including by Correspondent as well as by extracted entity type (persons, organizations, and locations).



Browse Menu in the Discovery Module

5.6 Searching Email



The screenshot shows the ePADD Discovery Search interface. At the top is a blue navigation bar with the ePADD Discovery logo on the left and links for 'Collections', 'Browse', and 'Search' in the center. A help icon is on the right. Below the navigation bar, there is a circular profile picture of a person and the text 'Harrison Studio papers, Email Series' with a 'Search' link underneath. Below this, there are two tabs: 'Simple search' (which is selected and underlined) and 'Query Generator'. A search input box with the placeholder text 'search query' is positioned below the tabs. A blue 'SEARCH →' button is located below the input box. At the bottom of the interface, there is a link that says 'Need more search options? Try [Advanced Search](#).'

To search the email archive, navigate to the Search screen.

Beginning with v2.0, ePADD supports three types of search: simple search, advanced search, and the query generator.

To use the simple search feature, simply type in your query into the simple search box available on the initial search screen. This will search across message headers (correspondents and subjects) and message text, as well as the text of all document attachments.

Once you have entered your term(s) and made your selection, click the *Search* button. The search string will appear highlighted on the search results screen.

Advanced Search enables the user to generate complex searches of email text, correspondents, attachments, and any actions previously taken on the messages, as well as a variety of other parameters.

Advanced Search

Text

Terms

☒ Search body ☒ Search subject ☒ Search attachments ☒ Search original text

Entity

Correspondents

Name or email

☒ To ☒ From ☒ Cc ☒ Bcc

Mailing List

☐ Yes ☐ No ☒ Either

Attachments

File Name

File Size

☐ Reg Ex

Type

Other extension

Actions

Annotation

Reviewed

☐ Yes ☐ No ☒ Either

Restricted

☐ Yes ☐ No ☒ Either

Not transferred

☐ Yes ☐ No ☒ Either

Miscellaneous

Time Range: To

Message Direction: ☐ Incoming ☐ Outgoing ☒ Either

Email Source:

Message Folder:

Lexicons:

Lexicon Category:

Entity type:

Sort results by:

[SEARCH →](#) [Clear form](#)

Search Tips can be accessed by selecting the  button in the top right corner of the *Advanced Search* screen.

ePADD also allows a user to search the email archive for entities contained in a given block of provided text, using the *Query Generator*. Any matching terms will be highlighted on the results page.


Collections Browse Search 


Robert Creeley papers - Email series
 Search

Simple search
Query Generator

The Project Gutenberg EBook of Moby Dick; or The Whale, by Herman Melville

ETYMOLOGY.

(Supplied by a Late Consumptive Usher to a Grammar School)

The pale Usher--threadbare in coat, heart, body, and brain; I see him now. He was ever dusting his old lexicons and grammars, with a queer handkerchief, mockingly embellished with all the gay flags of all the known nations of the world. He loved to dust his old grammars; it

[SEARCH →](#)

Need more search options? Try [Advanced Search](#).

Search options within the Discovery Module

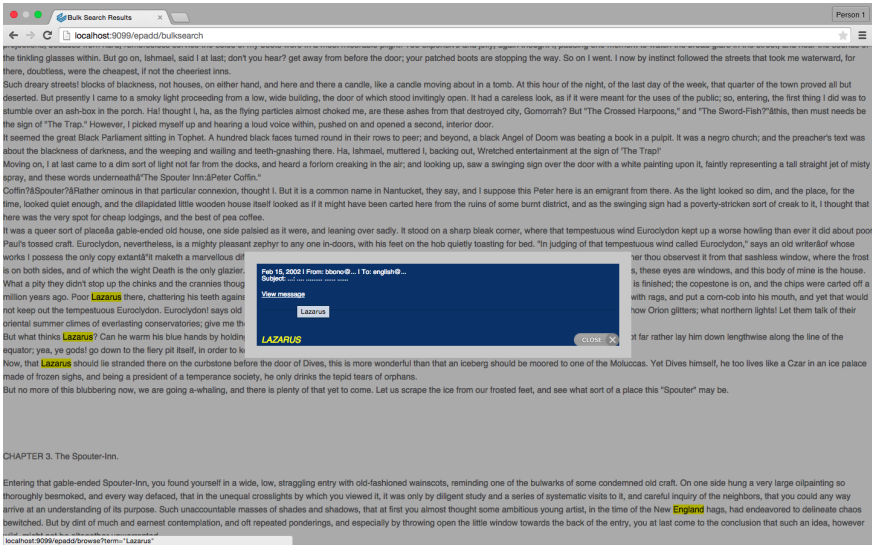
```

Date:January 26, 2001 3:39pm
From:snhowe@...
To:creeley@...
Subject:.... ..

....
.. Neil ..
.. Neil ..
.. Charles ..
..
.. --Neil ..
..
.. Juliana Spahr .. Myung Mi
Kim ..
..
.. Dennis ..
.. Charles ..
..
.. ) ..
.. Charles ( ..
.. ) ..
.. ? ..
.. ? ..
Susan

```

Discovery Module search results, displaying only redacted headers and extracted entities



The screenshot shows a web browser window with the address bar displaying 'localhost:9090/epadd/bulksearch'. The page content is a search result for the term 'Lazarus' within a document titled 'The Spouter-Inn'. The search results are displayed in a table with columns for 'Date', 'From', and 'To'. The results show a message from 'snhowe@...' to 'creeley@...' on January 26, 2001, at 3:39pm. The message body contains a search for 'Lazarus' and returns several results, including 'Lazarus' and 'Lazarus'.

Query generator in action

6 Delivery Module



Delivery Module Navigation Bar

The Delivery Module enables archival repositories to provide moderated full-text access to unrestricted email archives within a reading room.

6.1 Importing the Email Archive into the Delivery Module

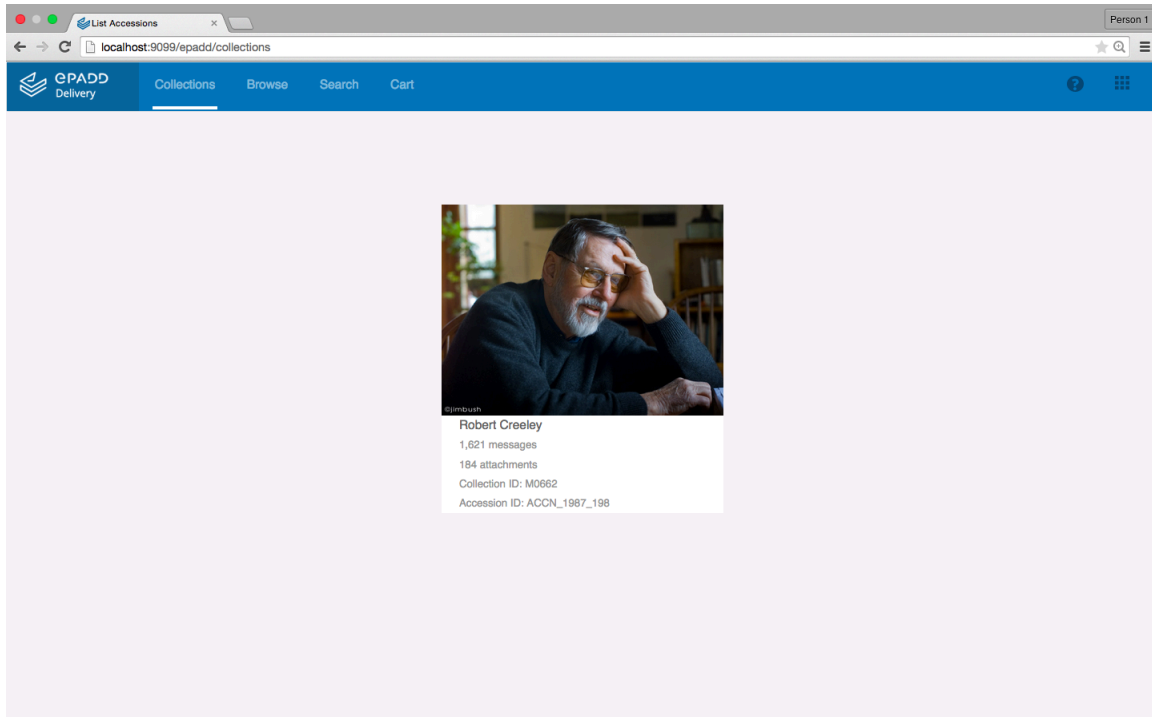
In order for ePADD to recognize the email archive, you must first ensure it is in the proper location within your user directory. (See **Section 2: Getting Started** for more information about locating your user directory). If an “epadd-delivery” folder does not already exist within your user directory, create that folder, and add the appropriate email archive (which should be a folder titled “Email Archive of <Archive Owner>-Delivery”) to that location.

Now run the ePADD software, and select the Delivery Module from the Settings Menu. At this point, you may wish to reset the “reviewed” status for all messages that may have been marked as “reviewed” in the Processing Module.. To do this, navigate to the Settings Menu under Browse and select the “Set Default Actions” button (see *4.1: Importing the Email Archive into the Processing Module* for more information about this step).

6.2 Navigating to a Collection

The Collections menu provides a user with moderated access to the email archive of any processed collections.

The user selects the collection they wish to access by clicking on the related image.



Selecting a Collection

The next screen provides basic details of the collection. A user can proceed with viewing the collection by selecting the “Enter” button.

Robert Creeley papers



Collection Details

Institution
Stanford University

Repository
Special Collections & University
Archives

Collection ID
M0662

Accession ID
ACCN 2005-182

Date Range
1995-03-05 to 2005-03-23
8 messages undated

Messages: 1,680
Incoming: 868
Outgoing: 15

Attachments: 245
Images: 34
Documents: 84
Others: 127

Contact email
specialcollections@stanford.edu

About Robert Creeley

The Robert Creeley Papers document the life work of a leading American poet of the 20th century, one of the core members of the "Black Mountain School." They also document several important movements in American poetics in the second half of the century. The papers include Creeley's personal and professional correspondence, journals, business records, personal mementos, clippings, artwork, and other documents generated and collected by him from 1950 to 1997.

Rights and Conditions

Property rights reside with the repository. Literary rights reside with the creators of the documents or their heirs. To obtain permission to publish or reproduce, please contact the Public Services Librarian of the Dept. of Special Collections.

Notes

Additional Creeley materials can be found in M0553 and M0347.

ENTER →

Finding Aid

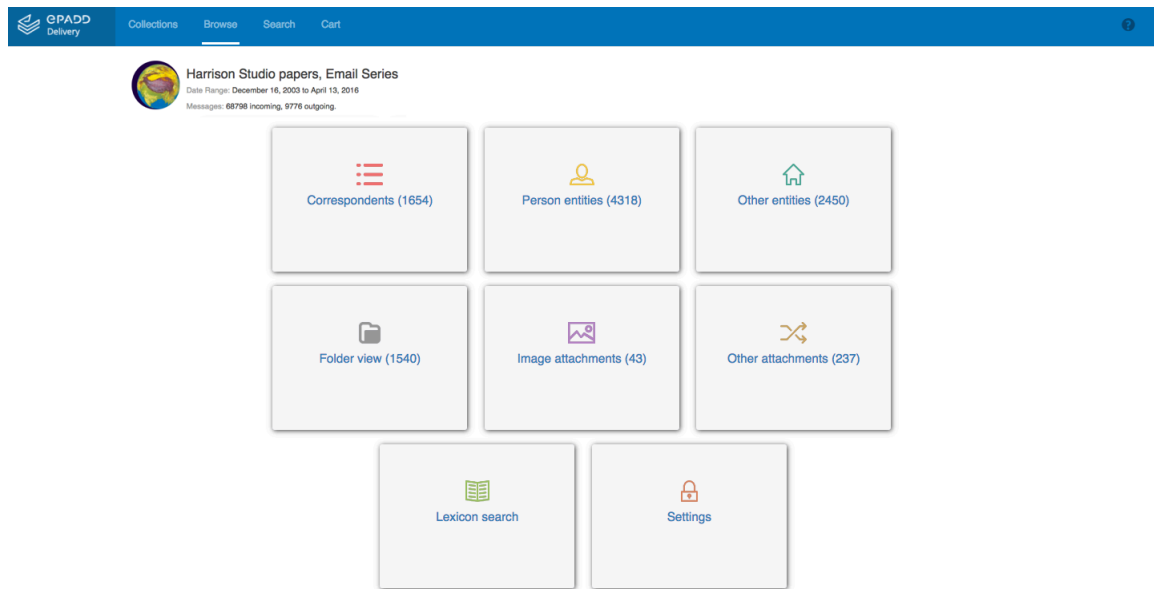
Catalog Record

Email messages in the ePADD Discovery Module have been redacted to ensure the privacy of donors and other correspondents. Please contact the host repository if you would like to request access to full messages, including any attachments.

Accessing a Collection

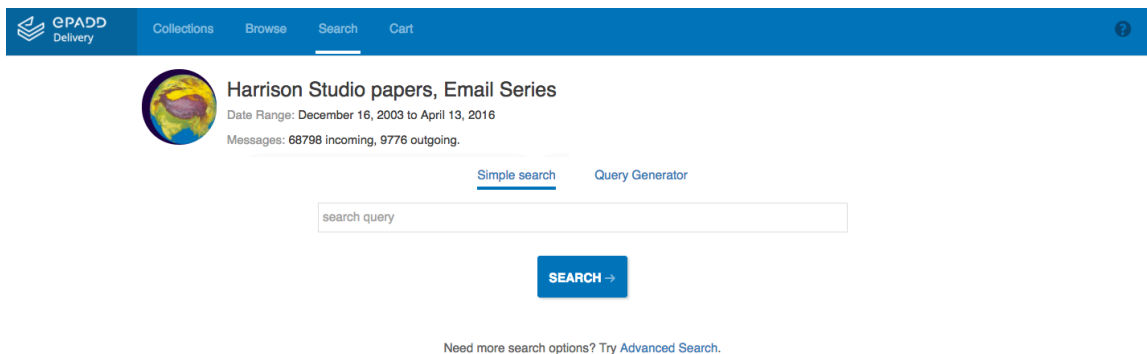
6.3 Browsing the Email Archive

The Browse Menu provides a user with access to several options to browse the email archive, including by Correspondent or by extracted entity type (persons, organizations, and locations). The user can also generate complex tiered searches using a customizable lexicon, as well as browse image attachments, and download documents and other attachments to the workstation for further review.



Browse Menu in the Delivery Module

6.4 Searching the Email Archive



The screenshot shows the ePADD Search interface. At the top is a blue navigation bar with the ePADD Delivery logo and links for Collections, Browse, Search (which is active), and Cart. Below the navigation bar, the collection name 'Harrison Studio papers, Email Series' is displayed next to a globe icon. Below the name, the date range 'December 16, 2003 to April 13, 2016' and message counts '68798 incoming, 9776 outgoing' are shown. There are two tabs: 'Simple search' (which is selected) and 'Query Generator'. Below the tabs is a search query input box with the placeholder text 'search query'. A blue 'SEARCH →' button is positioned below the input box. At the bottom, a link says 'Need more search options? Try Advanced Search.'

To search the email archive, navigate to the Search screen.

ePADD supports three types of search: simple search, advanced search, and the query generator.

To use the simple search feature, simply type in your query into the simple search box available on the initial search screen. This will search across message headers (correspondents and subjects) and message text, as well as the text of all document attachments.

Once you have entered your term(s) and made your selection, click the *Search* button. The search string will appear highlighted on the search results screen.

Advanced Search enables the user to generate complex searches of email text, correspondents, attachments, and any actions previously taken on the messages, as well as a variety of other parameters.

Advanced Search

Text

Terms

☒ Search body
 ☒ Search subject
 ☒ Search attachments
 ☒ Search original text

Entity

Correspondents

Name or email

☒ To
 ☒ From
 ☒ Cc
 ☒ Bcc

Mailing List

☐ Yes
 ☐ No
 ☒ Either

Attachments

File Name

File Size

☐ Reg Ex

Type

Other extension

Actions

Annotation

Reviewed

☐ Yes
 ☐ No
 ☒ Either

Restricted

☐ Yes
 ☐ No
 ☒ Either

Not transferred

☐ Yes
 ☐ No
 ☒ Either

Miscellaneous

Time Range

To

Message Direction

☐ Incoming
 ☐ Outgoing
 ☒ Either

Email Source

Message Folder

Lexicons

Lexicon: Category

Entity type

Sort results by

Search Tips can be accessed by selecting the  button in the top right corner of the *Advanced Search* screen.



ePADD allow the user to mark messages as “reviewed” to assist with keeping track of research, as well as to request copies of messages from the email archive. A user can let ePADD know that a particular message has been reviewed by selecting the icon from the top of the screen and selecting the “Apply” button. The user can also let ePADD know that it should consider all messages currently being browsed reviewed by first selecting the icon and then selecting the “Apply to All” button.

To request copies of particular messages in the email archive, a user can add them to his/her cart by selecting the  icon from the top of the screen and selecting the “Apply” button. The user can also add all messages currently being browsed to the cart by first selecting the  icon and then selecting the “Apply to All” button.

The user can use the same functionality to annotate messages one at a time or en masse. Exported messages retain user annotations.




Indicating a message has been reviewed




Adding a message to the Cart

6.6 Requesting Email Messages via the Cart

When the user is ready to request messages, they can navigate to the Cart via the navigation bar, then select “Request Messages” to export an MBOX file containing messages and any user-added annotations to the Desktop. Depending on the policies of your institution, a reference librarian/archivist can transfer the MBOX file to the patron using any number of methods.



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Email Archives of Robert Creeley
229 messages in cart

Show 10 entries

Search:

Subject	Date	Annotation
Re: All's ok!	23 February 2001	Mention to Olivia
Re: February 26 and March 5	26 February 2001	NONE
Re: Orals list for Jonathan Minton	28 February 2001	NONE
Re: Orals list for Jonathan Minton	28 February 2001	NONE
Re: Orals list for Jonathan Minton	28 February 2001	NONE
Re: All's ok!	1 March 2001	NONE
Re: its matt w/ a request	1 March 2001	NONE
Re: its matt w/ a request	6 March 2001	NONE
Re: Albany May 23rd	7 March 2001	NONE
Re: [Fwd: its matt w/ a request]	11 March 2001	NONE

Showing 31 to 40 of 229 entries

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REQUEST MESSAGES

Requesting copies of Messages via the Cart

Note to Repository Staff: After a researcher has confirmed that they have completed their work with the Delivery Module, and that the files they ordered have been successfully delivered to them, a repository staff member can remove the email archive working directories from the public workstation by deleting the following folders under the user directory: “epadd-settings” and “epadd-delivery.”