

**Oracle® Universal Records Management
Records Manager Corporate Edition Installation Guide
10g Release 3 (10.1.3.3.1)**

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Records Manager Corporate Edition Installation Guide, 10g Release 3 (10.1.3.3.1)
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Table of Contents

C

Chapter 1: Installation Overview

About Corporate Edition	1-1
Software Requirements	1-1
Supported Hardware and Software	1-2

Chapter 2: Installing Corporate Edition

Overview	2-1
Preparing a DB2 Database	2-2
Installing Software with Component Manager	2-3
Installing Software with Component Wizard	2-4
Restarting Content Server	2-5
Rebuilding the Content Server Search Index	2-6
Populating Option Lists	2-7

Chapter 3: Upgrading Corporate Edition

Overview	3-1
Checking the Content Server Environment	3-1
Upgrading the Software with Component Manager	3-2
Upgrading the Software with Component Wizard	3-3
Upgrading from Version 7.1.3	3-4
Disable Components	3-4
Uninstall Components	3-4

Chapter 4: Uninstalling Corporate Edition

Overview	4-1
----------------	-----

Components To Be Uninstalled	4-1
Uninstalling With Component Manager	4-2
Uninstalling With Component Wizard.	4-3
Post-Uninstallation Steps	4-4
Disabling Corporate Edition Fields	4-4
Deleting Corporate Edition Fields	4-5

Appendix A: Installation Details

Overview	A-1
Corporate Edition Components	A-1
RecordsManagement	A-2
ReportMaker	A-2
UIEnhancements	A-2
Help	A-2
Advanced Options List.	A-3
Related Content.	A-3
FileResultSetComponent.	A-3
SearchAndTag.	A-3
Installation Options.	A-3
RmaE-Mail.	A-4

Appendix B: Metadata Fields

Custom Metadata Fields	B-1
----------------------------------	-----

Appendix C: Interactions With Other Applications

Overview	C-1
Folders	C-1
Content Tracker	C-2

Appendix D: Third Party Licenses

Overview	D-1
Apache Software License	D-1
W3C® Software Notice and License	D-2
Zlib License	D-4
General BSD License.	D-5
General MIT License	D-5
Unicode License.	D-6

Miscellaneous Attributions	D-7
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Index

INSTALLATION OVERVIEW

ABOUT CORPORATE EDITION

Records Manager Corporate Edition enables you to manage content items—regardless of their source or format—in a single, consistent, manageable infrastructure. Content items managed by Corporate Edition are assigned retention schedules and disposition rules that control their lifecycle.

The items and their associated metadata are stored in retention schedules, which are hierarchies with categories that define disposition instructions for content. Access to the items is controlled by rights assigned to users by an administrator. The items can be accessed, reviewed or retained in an easy and efficient manner by authorized people according to the requirements of your organization.

Corporate Edition can also manage disposition schedules of content in the content server. This enables you to schedule lifecycles for content to eliminate outdated or superseded information or comply with legal audit holds.

SOFTWARE REQUIREMENTS

Required Software

The following software **must** be installed and functioning correctly before you can install the Records Manager Corporate Edition 10gR3 software:

- ❖ Content Server version 10gR3.

Optional Software

The following software may be required for Records Manager Corporate Edition, depending on the desired functionality:

- ❖ Desktop 7.0 or higher, including Outlook Integration (for checking in content from within supported e-mail clients). It is recommended that you install the latest available version.



Note: See the Desktop documentation for information on the Outlook integration. E-mail messages or attachments saved as text or other format from any e-mail client application can be manually checked in using the standard browser interface (content server check-in page).

SUPPORTED HARDWARE AND SOFTWARE

Consult your Content Server installation documentation for a list of supported operating systems, software, and hardware.

INSTALLING CORPORATE EDITION

OVERVIEW

Performing a new installation of the Corporate Edition software consists of the following steps:

1. [Preparing a DB2 Database](#) (page 2-2) (if required)
2. Installing the Common Utilities Bundle software and the Corporate Edition software in either of two ways:
 - ❖ [Installing Software with Component Manager](#) (page 2-3)
 - ❖ [Installing Software with Component Wizard](#) (page 2-4)
3. [Restarting Content Server](#) (page 2-5)
4. [Rebuilding the Content Server Search Index](#) (page 2-6) (if required)
5. [Populating Option Lists](#) (page 2-7)

You cannot upgrade Records Manager Corporate Edition 10gR3 to Records Manager DoD Edition 10gR3 or Physical Content Manager 10gR3.



Important: Records Manager Corporate Edition 10gR3 is not compatible with Content Server releases prior to 10gR3. You must have the appropriate Content Server version in order to use this software.

PREPARING A DB2 DATABASE

If you are using DB2 as the database, you may need to make some configuration changes. DB2 has a default page size of 4K, while Records Manager Corporate Edition requires a 32K page size. If you are using DB2's default page size, you will need to create additional tablespace that can handle a 32K page size.

To create additional tablespace for the DB2 database, complete the following steps:

1. In the DB2 command-line processor, create a BufferPool that has a 32K page size:

```
CONNECT TO <db_name> USER <user_name> USING <password>
CREATE BUFFERPOOL WIDE SIZE 250 PAGESIZE 32k
DISCONNECT <db_name>
```

2. Reload the Oracle database to activate the newly created BufferPool:

❖ If the Oracle database is the only database in the DB2 instance, use the following commands to reload the database:

```
FORCE APPLICATION ALL
DEACTIVATE DATABASE <db_name>
ACTIVATE DATABASE <db_name>
```

❖ If there is more than one database in the DB2 instance, use the following commands to reload the database:

- a. Find the applications that are connected to the Oracle database using the following command:

```
LIST APPLICATIONS FOR DATABASE <db_name>
```

- b. Close each application connection using the following command:

```
FORCE APPLICATION <application-handle>
```

- c. Reload the database using the following commands:

```
DEACTIVATE DATABASE <db_name>
ACTIVATE DATABASE <db_name>
```



Note: If any of the FORCE, DEACTIVATE, or ACTIVATE commands doesn't return DB20000I, finish all three commands and then run them again.

3. Create the tablespace, temporary tablespace, and system temporary tablespace using the following commands:

```
CONNECT TO <db_name> USER <user_name> USING <password>
CREATE TABLESPACE WIDE_TBSP PAGESIZE 32K MANAGED BY SYSTEM USING
('<absolute_dir_path_for_tablespace>') BufferPool WIDE
CREATE TEMPORARY TABLESPACE TEMP_WIDE_TBSP PAGESIZE 32K MANAGED BY SYSTEM
USING ('<absolute_dir_path_for_temp_tablespace>') BufferPool WIDE
```

```
CREATE SYSTEM TEMPORARY TABLESPACE TEMP_SYS_W_TBSP PAGESIZE 32K MANAGED BY
SYSTEM USING ('<absolute_dir_path_for_system_tabspace>')
BufferPool WIDE DISCONNECT <db_name>
```



Note: Make sure that the `<user_name>` and `<password>` match Oracle's `JdbcUser` and `JdbcPassword` configuration entries. If they do not match, you will need to grant rights to Oracle's `JdbcUser` on these newly created tablespaces.

4. Make sure there are no tables in the default tablespace.



Important: If tables exist, you should migrate data before dropping the default tablespace. Otherwise, you could lose data when performing the next step.

5. Use the following commands to drop the default tablespace:

```
CONNECT TO <db_name> USER <user_name> USING <password>
DROP TABLESPACE USERSPACE1
DISCONNECT <db_name>
```

INSTALLING SOFTWARE WITH COMPONENT MANAGER



Important: You must install the Common Utilities Bundle prior to installing the product. The following instructions can be used for installing both the Common Utilities Bundle and the product software.

To install the necessary software using Component Manager, complete the following steps:

1. Open a new browser window and log into Content Server as a system administrator.
2. Go to the Administration Applets page and click the **Admin Server** link.
3. On the Content Admin Server page, click the button of the content server instance where you want to install the software.
The status page for the content server instance is displayed.
4. In the option list for the server instance, click the **Component Manager** link.
The Component Manager page is displayed.
5. Click the **Browse** button next to the **Install New Component** field.
6. Navigate to the component zip file (the CommonUtilitesBundle or *product.zip*), select it, and close the file selection dialog.

7. Click **Install**. An overview page is displayed providing a list of the items that will be installed.
8. Click **Continue**. The Install Settings page is displayed providing a list of the options that can be enabled. Select all the options that you want to enable. It is strongly recommended that you enable all preselected options.



Note: For further details about the various installation options, see [Appendix A \(Installation Details\)](#).

9. Click **Continue**. All required files are now installed. This may take a few minutes.
10. After all files have been copied, a message is displayed stating that the components were uploaded and installed successfully.
11. Click the link to enable the component and restart the server.
The content server status page is displayed.
12. Click the restart icon (↻) to restart the content server instance.

INSTALLING SOFTWARE WITH COMPONENT WIZARD

To install the software using Component Wizard, complete the following steps:

1. Start Component Wizard:
 - ❖ In Windows, choose **Start—Programs—Content Server—<install_dir>—Utilities—Component Wizard**.
 - ❖ In UNIX, navigate to the `<install_dir>/bin` directory, where `<install_dir>` refers to the Content Server installation directory. At the command prompt, type `ComponentWizard`.

The Component Wizard main screen and the Component List screen are displayed.

2. Click **Install**. The Install dialog is displayed.
3. Click **Select** and navigate to the component zip file (`CommonUtilitiesBundle` and `RetentionManager.zip`).
4. Click on the zip file. The Install list displays the files that will be installed.

5. Click **OK**. The Edit Preference Prompt dialog is displayed. Select all management options that you want to enable. It is strongly recommended that you enable all preselected options.



Note: For further details about the various installation options, refer to [Appendix A \(Installation Details\)](#).

6. Click **OK**. All required files are now installed. This may take a few minutes.
7. After all files have been copied, you are prompted to confirm enabling the listed components. Click **Yes**.
8. Close Component Wizard.
9. Restart the content server. For further information, see [Restarting Content Server \(page 2-5\)](#).

RESTARTING CONTENT SERVER

Whenever you add and enable a new component, you need to restart the content server. If you prefer or require any down time, you may also choose to stop and then start Content Server with two separate commands.

You can restart the content server by reinitiating the services (Windows) or by reinitiating the processes (UNIX).

You can also restart the content server by using the Admin Server. You need to have the ‘sysmanager’ role to access a content server through Admin Server.

To restart a content server in Admin Server, complete the following steps:

1. Log into Universal Content Management as a system administrator.
2. Go to the Administration Applets page and click the **Admin Server** link.
3. On the Content Admin Server page, click the button of the content server instance that you want to restart.

The status page for the content server instance is displayed.

4. In the option list for the server instance, click the **Component Manager** link. Verify that the RetentionManager component is displayed in the **Enabled Components** box.
5. In the option list for the server instance, click the **Start/Stop Content Server** link.
6. Restart the content server by clicking the restart icon ().

REBUILDING THE CONTENT SERVER SEARCH INDEX



Important: This step is only required if your content server is using Verity as the search/index engine. If you are using database searching/indexing, you do not need to rebuild the search index.

A new installation of Corporate Edition 10gR3 adds custom metadata fields to the content server. For an overview of these fields, see [Appendix B \(Metadata Fields\)](#). After installing Corporate Edition 10gR3 for the first time, you need to rebuild the Verity search index.

Please note the following:

- ❖ After installing Corporate Edition for the first time, you **must** rebuild the search index for Corporate Edition to function properly. If you do not, security is not applied to search results. This means that users can see content items in the search results list that they do not have access to. If they try to access these content items, an “access denied” error is displayed. This may interfere with your organization’s security model as users will be able to see some metadata information about the content items (for example, their title).
- ❖ Rebuilding the search index may be a very time-consuming process, depending on the number of content items managed by your content server instance. It is therefore recommended that you rebuild the index during off-peak hours of Content Server use, which is typically at night or on a weekend.

To rebuild the search index, complete the following steps:

1. Log into Content Server as a system administrator.
2. Go to the Administration Applets page and click the **Repository Manager** link.

The Repository Manager utility is started. (You may be prompted to log in.)

3. In Repository Manager, open the **Indexer** tab.
4. In the Collection Rebuild Cycle area (bottom half), click the **Start** button.
The index is now rebuilt. During the rebuild process, the Start button in the Collection Rebuild Cycle area is grayed out and cannot be clicked. The process is completed when the Start button is available again.
5. Exit the Repository Manager utility.

POPULATING OPTION LISTS

Records Manager Corporate Edition adds a number of metadata fields to the content server database. Some of these new fields have option lists, which need to be populated with entries that are meaningful to your organization.

All of the option lists already have default values (for example, “Default”). You can use the procedure below to customize the option lists for information fields.

In addition to the standard Corporate Edition metadata fields mentioned above, there may be other, optional fields that require custom values:

- ❖ any fields required for custom recurring triggers that are not built in

For further details about creating custom recurring triggers, see the *Corporate Edition System Administration Guide*.

To customize option list values, complete the following steps:

1. Open a new browser window and log into Content Server as a system administrator.
2. Go to the Administration Applets page and click the **Configuration Manager** link.
The Configuration Manager applet opens.
3. Open the **Information Fields** tab.



Tech Tip: You can alphabetize the fields by clicking on the Name column heading. Clicking on this heading again reverses the sort order.

4. In the **Field Info** list, select the field whose option list values you want to modify, and click **Edit**.
The Edit Custom Info Field dialog is displayed.
5. Click **Configure** next to the Enable Option List field.



Note: If the Enable Option List check box is not selected, the field does not use an option list, and the Configure button is not available.

6. Click **Edit** next to the Use Option List field.
The Option List dialog is displayed.
7. Type your entries in the list box and insert a carriage return after each entry. If you do not set a default value for the field (see step 9), the field value will initially be blank and users can select one from the dropdown list. Otherwise, the default value is

preselected, but users can still select a different value from the list. Specify your sort order preferences and click **OK**. The Options List dialog closes.

8. Click **OK** to close the Configure Option List dialog.
9. In the Edit Custom Info Field dialog, specify a default field value if there is one for your organization (in the **Default Value** field).
10. Click **OK**.
11. Repeat steps 4 to 10 for each metadata field whose option list values you want to modify.
12. Once you are done defining the option lists, you do not need to restart the content server. You can select the New Check In menu option and test that your option lists are displayed as you prefer. In the content check-in form, verify that your option lists appear as designed.

UPGRADING CORPORATE EDITION

OVERVIEW

Upgrading an existing 7.1.4 version of the software consists of the following steps:

1. [Checking the Content Server Environment](#) (page 3-1)
2. Upgrading the software in either of two ways:
 - ❖ [Upgrading the Software with Component Manager](#) (page 3-2)
 - ❖ [Upgrading the Software with Component Wizard](#) (page 3-3)
3. [Restarting Content Server](#) (page 2-5)
4. [Rebuilding the Content Server Search Index](#) (page 2-6) (if required)

If upgrading from version 7.1.3, additional steps are needed. See [Upgrading from Version 7.1.3](#) (page 3-4) for details.

CHECKING THE CONTENT SERVER ENVIRONMENT

Before upgrading, make sure that you are running the correct version of Content Server. Corporate Edition 10gR3 requires Content Server 10gR3; it does **not** run on earlier versions.

If you upgrade the software, the installation settings from previous installs are not loaded by default. In order to upgrade components that were installed previously, you must select the check boxes for each component. If you do not select the check box, the component will not be upgraded.

See [Appendix A \(Installation Details\)](#) for information about components that are installed.

All existing configuration settings (including retention schedules, security setup, etc.) are preserved.

UPGRADING THE SOFTWARE WITH COMPONENT MANAGER



Important: You must install the Common Utilities Bundle before upgrading your software. See [Chapter 2 \(Installing Corporate Edition\)](#) for details about installing the component.

To upgrade the software using Component Manager, complete the following steps:

1. Open a new browser window and log into Content Server as a system administrator.
2. Go to the Administration Applets page and click the **Admin Server** link.
3. On the Content Admin Server page, click the button of the content server instance where you want to install the components.
The status page for the content server instance is displayed.
4. In the option list for the server instance, click the **Component Manager** link.
The Component Manager page is displayed.
5. Click the **Browse** button next to the **Install New Component** field.
6. Navigate to the Corporate Edition component zip file, select it, and close the file selection dialog.
7. Click **Install**. An overview page is displayed providing a list of the items that will be installed.
8. Click **Continue**. The Install Settings page is displayed providing a list of the options that can be enabled. Select all the options that you want to enable. It is strongly recommended that you enable all preselected options.
9. Click **Continue**. All required files are now installed. This may take a few minutes.
10. After all files have been copied, a message is displayed stating that the components were uploaded and installed successfully.

11. Click the link to enable the component and restart the server.
The content server status page is displayed.
12. Click the restart icon (↻) to restart the content server instance.
13. Rebuild the search index (if required). For further information, see [Rebuilding the Content Server Search Index](#) (page 2-6).

UPGRADING THE SOFTWARE WITH COMPONENT WIZARD

To upgrade the software using Component Wizard, complete the following steps:

1. Start Component Wizard:
 - ❖ In Windows, choose **Start—Programs—Content Server—<install_dir>—Utilities—Component Wizard**.
 - ❖ In UNIX, navigate to the <install_dir>/bin directory, where <install_dir> refers to the Content Server installation directory. At the command prompt, type `ComponentWizard`.
- The Component Wizard main screen and the Component List screen are displayed.
2. Click **Install**. The Install dialog is displayed.
3. Click **Select** and navigate to the Corporate Edition component zip file.
4. Click on the zip file. The Install list displays the files that will be installed.
5. Click **OK**. The Edit Preference Prompt dialog is displayed. Select all options that you want to enable. It is strongly recommended that you enable all preselected options.
6. Click **OK**. All required files are now installed. This may take a few minutes.
7. After all files have been copied, you are prompted to confirm enabling the listed components. Click **Yes**.
8. Close Component Wizard.
9. Restart the content server. For further information, see [Restarting Content Server](#) (page 2-5).
10. Rebuild the search index (if required). For further information, see [Rebuilding the Content Server Search Index](#) (page 2-6).

UPGRADING FROM VERSION 7.1.3

If you are upgrading from version 7.1.3, several components must be disabled and removed before installing the newest version or they will conflict with the updated components.

Disable Components

To disable components, follow these steps:

1. Open a new browser window and log in as a system administrator.
2. Click the **Admin Server** link from the Administration tray.
3. On the Content Admin Server page, click the button of the content server instance where you want to install the software.
The status page for the content server instance is displayed.
4. In the option list for the server instance, click the **Component Manager** link.
5. The Component Manager page is displayed.
 - a. Disable the following components:
 - RecordsManager
 - RecordsManagement
 - RmaLinks
 - PopupCalendarEx
 - CSCompatibility-7.5.1
 - ExternalHelper
 - PhysicalContentManager
6. WorkflowTemplateChangesRestart the content server instance.

Uninstall Components

After disabling the components, you must complete the following steps to uninstall them:

7. On the Component List screen, Select the component from the Uninstall Component drop-down menu. the following components:
 - RmaLinks
 - PopupCalendarEx

- CSCompatibility-7.5.1
- ExternalHelper
- PhysicalContentManager
- WorkflowTemplateChanges



Important: The RecordsManager and RecordsManagement components must not be uninstalled. Leave these components disabled.

- b. Click **Uninstall**
- c. Click **OK** to confirm your selection.
- d. When the component has been uninstalled, click the link to return to the Component Manager.
- e.
8. Restart the content server instance.
9. Install the software as detailed in [Chapter 2 \(Installing Corporate Edition\)](#).

UNINSTALLING CORPORATE EDITION

OVERVIEW

Uninstalling the Corporate Edition software consists of the following steps:

- ❖ Determine the components to be uninstalled. See [Components To Be Uninstalled](#) (page 4-1).
- ❖ Uninstall the component in either of two ways:
 - [Uninstalling With Component Manager](#) (page 4-2)
 - [Uninstalling With Component Wizard](#) (page 4-3)
- ❖ Perform any post-installation steps. See [Post-Uninstallation Steps](#) (page 4-4) for details.

COMPONENTS TO BE UNINSTALLED

Depending on the options selected during the Corporate Edition installation, the following components may need to be uninstalled:

- RetentionManager
- RecordsManagement
- ReportMaker
- UIEnhancements

- SearchAndTag
- FileResultSetComponent
- AdvancedOptionsLists
- RmaEmail
- Related Content
- RetentionHelp

Please note the following:

- ❖ Disable all components to be uninstalled, restart the content server, then uninstall them.
- ❖ The procedures in this section assume you installed all components.

UNINSTALLING WITH COMPONENT MANAGER

To uninstall Corporate Edition components using Component Manager, complete the following steps:

1. Open a new browser window and log into Content Server as a system administrator.
2. Go to the Administration Applets page and click the **Admin Server** link.
3. On the Content Admin Server page, click the button of the content server instance where you want to uninstall the Corporate Edition components.
The status page for the content server instance is displayed.
4. In the option list for the server instance, click the **Component Manager** link.
The Component Manager page is displayed.
5. Disable the Corporate Edition components that you want to uninstall (see [Components To Be Uninstalled](#) (page 4-1)):
 - a. Select the component in the Enabled Components list.
 - b. Click the **Disable** button to move it to the Disabled Components list.
6. After disabling the last component, click the Start/Stop Content Server link on the Component Manager page.
7. Click the restart icon (↻) to restart the content server instance.
8. Select the disabled components to be uninstalled in the Uninstall Component dropdown list, and click **Uninstall**.

9. A prompt is displayed asking you to confirm the uninstallation process. Click **OK** to confirm.
10. After the component has been uninstalled, a message is displayed stating that the component was uninstalled successfully.
11. Click the link to return to Component Manager.

UNINSTALLING WITH COMPONENT WIZARD

To uninstall Corporate Edition components using Component Wizard, complete the following steps:

1. Start Component Wizard:
 - ❖ In Windows, choose **Start—Programs—Content Server—<install_dir>—Utilities—Component Wizard**.
 - ❖ In UNIX, navigate to the `<install_dir>/bin` directory, where `<install_dir>` refers to the Content Server installation directory. At the command prompt, type `ComponentWizard`.

The Component Wizard main screen and the Component List screen are displayed.

2. In the Custom Components list, select the Corporate Edition component that you want to uninstall (see [Components To Be Uninstalled](#) (page 4-1)), and click **Disable**.
Continue disabling all components.
3. Restart the content server (see [Restarting Content Server](#) (page 2-5)).
4. Restart the Component Wizard. Highlight a disabled component and click **Uninstall**.
You are prompted to confirm uninstalling the component. Click **Yes**.
The Uninstall dialog is displayed.
5. Click **OK**.
The component files are deleted, and the Custom Component list is displayed again.
6. Repeat steps 2 to 5 for each Corporate Edition component that you want to uninstall (see [Components To Be Uninstalled](#) (page 4-1)).
7. After uninstalling the last component, click the ‘x’ in the top-right corner to close the Component List dialog.
8. Choose **Options—Exit** to close Component Wizard.
9. Restart the content server (see [Restarting Content Server](#) (page 2-5)).

POST-UNINSTALLATION STEPS

After the Corporate Edition components have been uninstalled, the metadata fields remain in the Content Server user interface. If you want to disable or delete the fields, you can use Content Server's Configuration Manager utility. Disabling the fields hides the fields on the user interface while deleting the fields deletes the fields from the user interface, the database tables, and the search index. To see an overview of all metadata fields related to retention management, see [Appendix B \(Metadata Fields\)](#).

Disabling Corporate Edition Fields

To disable Corporate Edition fields, complete the following steps:

1. Start Configuration Manager:
 - ❖ In Windows, choose **Start—Programs—Content Server—<install_dir>—Configuration Manager**.
 - ❖ In UNIX, navigate to the `<install_dir>/bin` directory, where `<install_dir>` refers to the Content Server installation directory. At the command prompt, type `ConfigurationManager`.
2. Open the Information Fields tab.

The Field Info box lists all of the custom information fields.
3. Select a field you want to disable and click **Edit**.

The Edit Custom Info field is displayed.
4. Clear the **Enable on User Interface** check box and click **OK**. The Enabled column in the Field Info list now displays “No.” You must disable the fields one field at a time. Repeat steps 3 and 4 for each field you want to disable.
5. When you complete disabling the information fields, click **Update Database Design**. You may need to rebuild your search engine. If necessary, the Rebuild Search Index button becomes available.
6. Click **Rebuild Search Index**. When the rebuild completes, close the Configuration Manager applet and restart the Content Server.



Caution: Rebuilding the search index may be a very time-consuming process, depending on the number of content items managed by your content server instance. It is therefore recommended that you rebuild the index during off-peak hours of Content Server use, which is typically at night or on a weekend.

Deleting Corporate Edition Fields

To delete Corporate Edition fields from the database, complete the following steps:

1. Start Configuration Manager:

- ❖ In Windows, choose **Start—Programs—Content Server—<install_dir>—Configuration Manager**.
- ❖ In UNIX, navigate to the `<install_dir>/bin` directory, where `<install_dir>` refers to the Content Server installation directory. At the command prompt, type `ConfigurationManager`.

The Configuration Manager applet is displayed.

2. Open the Information Fields tab.

The Field Info box lists all of the custom information fields.

3. Select a field you want to delete and click **Delete**. You must delete the fields one field at a time.

4. When you complete deleting the information fields, click **Update Database Design**. When the update is complete, the Rebuild Search Index button becomes available.

5. Click **Rebuild Search Index**. When the rebuild completes, close the Configuration Manager applet and restart the content server.



Caution: Rebuilding the search index may be a very time-consuming process, depending on the number of content items managed by your content server instance. It is therefore recommended that you rebuild the index during off-peak hours of Content Server use, which is typically at night or on a weekend.



INSTALLATION DETAILS

OVERVIEW

This appendix covers the following topics:

- ❖ [Corporate Edition Components](#) (page A-1)
- ❖ [Installation Options](#) (page A-3)

CORPORATE EDITION COMPONENTS

When you install the Records Manager Corporate Edition software, the following main components are always installed:

- ❖ [RecordsManagement](#) (page A-2)
- ❖ [ReportMaker](#) (page A-2)
- ❖ [UIEnhancements](#) (page A-2)
- ❖ [Help](#) (page A-2)
- ❖ [Advanced Options List](#) (page A-3)
- ❖ [Related Content](#) (page A-3)
- ❖ [FileResultSetComponent](#) (page A-3)
- ❖ [SearchAndTag](#) (page A-3)



Important: Do not disable any of these components as long as Corporate Edition is installed. Otherwise Corporate Edition will cease to function correctly.

In addition to these mandatory components, one or more other components may be installed depending on the [Installation Options](#) (page A-3) you select.

RecordsManagement

This component is the master component for Records Manager Corporate Edition. It includes metadata editors for categories. It is installed in the following location:
<install_dir>/custom/RecordsManagement.

ReportMaker

This component is used to generate audit trail reports, user group reports, and file plan reports in a number of available formats. It is installed in the following location:
<install_dir>/custom/ReportMaker.

UIEnhancements

This component provides a number of enhancements for the Content Server user interface related to Corporate Edition. It is installed in the following location:
<install_dir>/custom/UIEnhancements.

Help

The RetentionHelp component includes the cross-platform HTML help system and PDF versions of the system administration and user guides. The PDF guides can be accessed from within each page of their corresponding help system. The help files are installed in the following locations:

- ❖ *<install_dir>/weblayout/help/recordsmanager_admin*
- ❖ *<install_dir>/weblayout/help/recordsmanager_user*
- ❖ *<install_dir>/weblayout/help/documentation/addons*
- ❖ *<install_dir>/weblayout/help/user_help/recordsmanager_user*
- ❖ *<install_dir>/weblayout/help/user_help/documentation/addons*

Advanced Options List

This component is used to provide increased functionality when creating option lists.

This component is installed in the following location:
`<install_dir>/custom/AdvancedOptionsList`.

Related Content

The Related Content component provides the functionality for linking content. For further information about links, see the *Records Manager Corporate Edition System Setup Guide*.

This component is installed in the following location:
`<install_dir>/custom/RelatedContent`.

FileResultSetComponent

This component is used to stream large resultsets to the file system instead of storing them in memory.

This component is installed in the following location:
`<install_dir>/custom/FileResultSet`.

SearchAndTag

This component is used to provide the search and update functionality used with screening and searching.

This component is installed in the following location:
`<install_dir>/custom/SearchAndTag`.

INSTALLATION OPTIONS

During the installation of the software, you are prompted to enable or disable a number of installation options:

- ❖ [RmaE-Mail](#) (page A-4)

RmaE-Mail

If this installation option is selected, the RmaEmail component is installed. This component allows automatic capturing of e-mail information. It is used in conjunction with Outlook Integration.

For new installations, this option is enabled by default.

The RmaEmail component is installed in the following location:

<install_dir>/custom/RmaEmail.

METADATA FIELDS

CUSTOM METADATA FIELDS

This section lists the metadata fields created by the **Corporate Edition** components. You can view the field definitions using the Configuration Manager utility.

Table B-1 Metadata fields

Information Field Name	Field Type	Field Caption
CategoryID	Long Text	Category ID
DistributionList	Text	Distribution List
EmailCC	Memo	Other Addressee(s)
EmailFrom	Text	Author Or Originator
Emailid	Text	wwxEmailid
EmailSubject	Long Text	Email Subject
EmailTo	Memo	Addressee(s)
EmailToLists	Long Text	Email To Lists
FreezeID	Memo	Folder Reason
FreezeReason	Memo	Freeze Comments

Metadata Fields

Information Field Name	Field Type	Field Caption
IsEmailRecord	Text	Is Correspondence
IsFrozen	Text	Is Frozen
IsVital	Text	Vital
PublicationDate	Date	Publication Date
ReceivedDate	Date	Received Date
RecordReviewDate	Date	Record Review Date
RecordSupersededDate	Date	Record Superseded Date
SupersededContent	Text	Superseding Content
SupersedeFlag	Text	Supersede Flag
SuperSupersededDate	Date	Super Superseded Date
VitalPeriod	Integer	Vital Period
VitalPeriodUnits	Text	Vital Period Units
VitalReviewer	Text	Vital Reviewer

INTERACTIONS WITH OTHER APPLICATIONS

OVERVIEW

This section lists the known interactions and dependencies of Corporate Edition 10gR3 with other Oracle applications that may be installed on the same computer:

- ❖ [Folders](#) (page C-1)
- ❖ [Content Tracker](#) (page C-2)

FOLDERS

Please note the following considerations if you are running the Folders component on the same computer as Records Manager Corporate Edition:

- ❖ If Folders is installed and enabled, users can delete content if they have RW permission to the RetentionGroup security group (in addition to the Records.Delete right). Normally, they would need RWD permission to that security group in order to delete a content item. This is because Folders sets the AuthorDelete=true parameter in its configuration file.

CONTENT TRACKER

In order to take advantage of the Last Access metric in Content Tracker, you must be using Content Tracker version 7.6 or later. The Last Access metric tells you when an item was last accessed by a user, allowing you to determine if an item should be retained or disposed.

To use this functionality, create a custom metadata field for the Last Access Metric after Content Tracker is installed. The actual name of the field will vary depending on the name used when creating the field. For example, if you name the field LastAccess, the metadata field name will be xLastAccess. See the *Content Tracker Administration Guide* for details about creating this metadata field and using the snapshot function, which contains the Last Access Metric.

To ensure the proper retention of archived and batchloaded content, you must set the Last Access date for the import/insert. Otherwise the access date for these content items will be null and retention based on this field will fail. Make certain to choose a suitable date for the import. For example, if you are importing an archive of data from a previous year, set that year as the import date rather than use the date of the import as the name. This will provide you with more information about the content of the archive. As mentioned in the preceding paragraph, the name of the field varies depending on the name used when creating the field.

See the *Records Manager DoD Edition System Setup Guide* for information about creating a custom direct trigger and establishing a relationship between the trigger and a specific Content Date such as Last Access date.

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ZLIB LICENSE

* zlib.h -- interface of the 'zlib' general purpose compression library
version 1.2.3, July 18th, 2005

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I

0-9

32K page size (DB2), 2-2

C

Collaboration Manager, C-2

Component Manager

 installation using, 2-3

 uninstalling product using, 4-2

 upgrading using --, 3-2

Component Wizard

 installation using, 2-4

 uninstalling product using, 4-3

components

 mandatory, A-1

 optional, A-3

 ReportMaker, A-2

 UIEnhancements, A-2

components installed, A-2

Content Server

 restarting, 2-5

custom metadata fields

 deleting, 4-5

 disabling, 4-4

D

DB2, preparing, 2-2

deleting product metadata fields, 4-5

disabling metadata fields, 4-4

E

e-mail option, A-4

H

help component, A-2

information fields

 deleting, 4-5

 disabling, 4-4

installation details, A-1

installation options, A-3

 e-mail, A-4

installed components, A-1, A-3

installing

 Content Server search index, 2-6

 populating option lists, 2-7

 restarting Content Server, 2-5

 using Component Manager, 2-3

 using Component Wizard, 2-4

installing product

 mandatory components, A-1

 optional components, A-3

 preparing DB2 database, 2-2

interactions

 product and Collaboration Manager, C-2

interactions with Collaboration Manager, C-2

interactions with Folders, C-1

M

metadata fields

 disabling, 4-4

O

operating systems, 1-2

option lists, populating, 2-7

P

page size, 2-2

populating option lists, 2-7

product components, A-2

product interactions

with Folders, C-1
product metadata fields
deleting, 4-5

R

rebuilding Content Server search index, 2-6
ReportMaker component, A-2
restarting Content Server, 2-5
RMA E-mail option, A-4

S

search index, rebuilding, 2-6
software requirements, 1-1

operating systems, 1-2

U

UIEnhancements component, A-2
uninstalling product
 deleting fields, 4-5
 disabling fields, 4-4
 using Component Manager, 4-2
 using Component Wizard, 4-3
upgrading
 using Component Manager, 3-2
upgrading Retention Manager
 checking Content Server environment, 3-1