Oracle Universal Records Management Adapter for Content Server Administration Guide
10*g* Release 3 (10.1.3.3.1)

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Oracle Universal Records Management Adapter for Content Server Administration Guide, 10g Release 3 (10.1.3.3.1)

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Chapter 3: Configuration

Chapter 4: Browsing the Retention Schedule

Chapter 5: Checking In Content for Retention

Chapter 6: Searching for Retained Content

Appendix A: Metadata Fields

Appendix B: Third Party Licenses

Index

INTRODUCTION

OVERVIEW

This section contains the following topics:

- ❖ About This Guide on page 1-1
- ❖ About the Adapter on page 1-3
- ❖ Software Requirements on page 1-6
- ❖ Conventions on page 1-8

ABOUT THIS GUIDE

This section contains the following topics:

- ❖ Product Overview on page 1-1
- ❖ Audience on page 1-2
- ❖ Standard Installation Architecture on page 1-2

Product Overview

Oracle Universal Records Manager (URM) provides the ability to perform records management, retention management, and litigation support across the entire enterprise. From a single Oracle URM server, organizations can define all their policies for records and retention management, as well as perform legal searches and apply litigation holds.

The Oracle URM Adapter for Content Server (hereafter abbreviated as the Adapter) obtains these policies from the URM server and applies them to the content items stored in the Content Server Vault.

The Adapter provides the bridge between URM which manages the content management policies and the Adapter server's content vault which stores the content. The Adapter enables corporations to manage records and retention policies and legal holds across multiple Content Servers from a single location. The Adapter sends information back to the URM server, so it can maintain an up-to-date catalog of the enterprise's important content. Thus, companies can apply their records and retention policies to more content, more consistently, with less administrative effort, and less disruption for users. These same benefits apply to litigation searches and holds.

Audience

This administration guide is intended for system administrators who need to install and configure the Adapter. System administrators will also use this guide to manage retention functions using the combined user interface for the Adapter and Records Manager (RM). This guide assumes that the product has been installed correctly and that you are familiar with Oracle products in general and the overall architecture of Content Server.

Standard Installation Architecture

This section provides a general overview of the relationships between the primary products.

Content Server has a vault, in which content is stored and managed. The Content Server adapter, when registered, passes the retention schedule from URM to the content in the Content Server vault.

Figure 1-1   Standard Adapter Installation Architecture
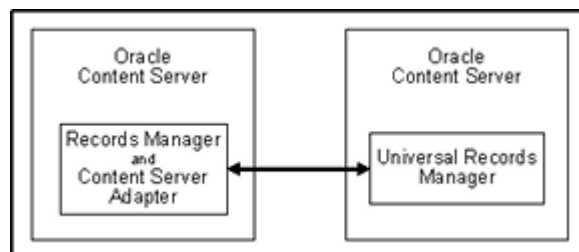
The major components involved in a typical installation include:

❖ **URM**—Enables organizations to manage their records and retention policies, disposition processes and litigation or audit holds in a central repository known as a URM Server. These policies, dispositions, and holds are applied to repository content through the Adapter.

❖ **RM**—Enables organizations to effectively manage both record and non-record content items on a retention schedule. The focus of records management tends to be the preservation of records for historical or archival purposes. Conversely, the focus of retention management of non-record content items tends to be the scheduled elimination of content in which the costs of retaining content outweighs the value of keeping it.

❖ **Content Server**—Stores and manages content in a repository.

❖ **Oracle URM Adapter for Content Server**—Communicates between URM and the Adapter server's content vault. The Adapter enables corporations to control content retention in the Adapter server's content vault through URM which deploys the enterprise's policies. The Adapter provides common retention functionality as follows:

   • Identifying the content in the repository that is of interest to URM.

   • Performing searches and declaring the applicable content items to URM.

   • Performing disposition actions on the existing content items when their retention periods end.

   • Establishing and removing holds and freezes on the content items, as necessary.

ABOUT THE ADAPTER

This section contains the following topics:

Overview of URM and the Adapter

Universal Records Management (URM) allows organizations to manage their records and retention policies, disposition processes, and litigation holds or freezes in a central repository known as a Universal Records Management (URM) server. They can then apply those policies, dispositions, and holds to content stored in multiple repositories

through URM Adapters. The repositories may be any server or application that holds content whose retention is to be controlled.

In this case, the Adapter server's content vault holds records and non-record content that needs to be preserved for a retention period, specified in a corporate retention schedule, and then destroyed according to a corporate disposition process. The records are preserved in place since the Adapter server's content vault has the ability to ensure that the record will remain unalterable during the retention period. Upon request, the Adapter server's content vault is also able to purge the records at the end of the retention period.

The Adapter server's content vault may also hold content that is not considered business records (non-records). There is no requirement that the content be preserved for the retention period although it may be desirable for various reasons. When retention of this content is no longer necessary, it can be disposed of according to the disposition processes stored within URM. With both records and non-records, there is an obligation to ensure that any material that is subject to a litigation or audit hold (freeze) is not deleted, either by a user or as part of a disposition process. The Adapter enables URM to ensure that deletion does not happen.

Note: Content items that are non-records and are not subject to a litigation or audit hold are not transferred to URM. Instead, these documents remain in the Adapter server's content vault and only their metadata is stored in URM.

Overview of the Retention Functions

The Adapter is the intermediary between URM and the Adapter server's content vault and manages their intercommunications. Content is stored in and remains in the Adapter server's content vault while URM simultaneously enforces corporate retention policies, disposition processes, and legal holds on the stored content.

Figure 1-2   Adapter Retention Functions Overview
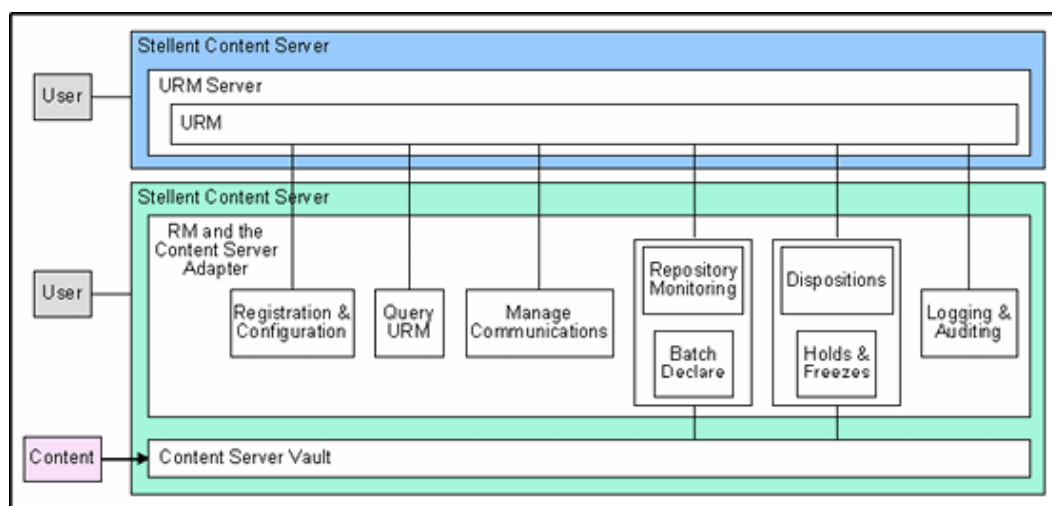
The Adapter provides the following basic retention functions:

❖ **Registration**—The Adapter registers itself with URM. This ensures that URM knows about the Adapter server's content vault and is ready to manage the stored content within the repository.

❖ **Configuration**—The Adapter handles all configuration requirements. This includes collecting the proper identification and credentials information for URM security and communications. Configuration information also includes mapping metadata fields and defining searches.

❖ **Query URM**—The Adapter queries URM for certain information. For example, it may need to retrieve retention schedules for specific items of interest. Or, the Adapter may need to request URM metadata for content items and obtain lifecycle information.

❖ **Manage Communications**—The Adapter monitors batch processes, handles communication errors with URM, and handles large work requests by grouping them into communication blocks and processing the response in chunks.

❖ **Repository Monitoring and Batch Declare**—The Adapter monitors the Adapter server's content vault by periodically searching the repository and informing URM of any changes in the repository that affect disposition processes or audit holds. For example, the Adapter will inform URM about new content checkins that need to be managed.

❖ **Perform URM Tasks**—The Adapter periodically asks URM for tasks that need to be performed within the repository. These tasks enable URM to abide by the corporate retention policies and disposition processes. Typical tasks include:

- URM may want the Adapter to perform a search within the Adapter server's content vault and provide a list of items matching the search criteria.

- As part of a scheduled disposition process, URM may want the Adapter to purge (or use another disposition method) an item that is stored in the Adapter server's content vault.

- When a litigation hold applies to managed content within the Adapter server's content vault, URM may want the Adapter to retrieve a list of affected items and preserve them to ensure that they are not edited or destroyed.

- When a litigation hold is removed, URM may want the Adapter to stop preserving the affected items and dispose of them according to retention schedule disposition rules and instructions.

❖ **Logging and Auditing**—The Adapter provides consistent logging for the activities it coordinates. The Adapter contributes event information to the log files that are then uploaded to URM, consolidated, and stored.

SOFTWARE REQUIREMENTS

This section contains the following topics:

❖ Compatibility with Content Server on page 1-6

❖ Supported Operating Systems on page 1-7

❖ Supported Databases on page 1-7

Compatibility with Content Server

Currently, the Oracle URM Adapter for Content Server 10*g*R3 communicates with Oracle Universal Records Manager 10*g*R3. Currently, this version of URM is supported only on Oracle Content Server versions 10*g*R3.

Supported Operating Systems

The current version of the Adapter supports the same operating systems as does Content Server 10*g*R3 and Records Manager Corporate Edition 10*g*R3:

❖ Microsoft Windows 2000 Server with Service Pack 4

❖ Microsoft Windows Server 2003, Standard Edition

❖ Microsoft Windows Server 2003, Web Edition

❖ Microsoft Windows Server 2003, Enterprise Edition (32-bit)

❖ Sun Solaris 9

❖ HP-UX 11i

❖ IBM AIX 5L version 5.2 or 5.3

❖ Red Hat Enterprise Linux 3.0 (AS or ES)

❖ SuSe Linux 8 or 9

Note: For more detailed information about the operating systems supported, as well as special considerations for specific operating systems, refer to the Content Server installation guides.

Supported Databases

The current version of the Adapter supports the same databases as does Content Server 10*g*R3 and Records Manager Corporate Edition 10*g*R3:

The following databases are supported:

❖ Microsoft SQL Server 2000 with Service Pack 3a or higher

❖ IBM DB2 8.1

❖ Oracle 9*i* (version 9.2) or Oracle 10*g*

Important: Oracle 9i versions prior to 9.2 are *not* supported. There is a known issue with these versions involving update statements with date fields that can corrupt rows of data (Oracle issue 2446039).

Important: If you are using IBM DB2 as the database, you may need to create additional tablespace to handle a 32K page size. See Preparing a DB2 Database (page 2-2) for further details.

CONVENTIONS

The following conventions are used throughout this guide:

❖ The notation *<Install_Dir>/* is used to refer to the location on your system where the content server instance is installed.

❖ Forward slashes (/) are used to separate the directory levels in a path name. A forward slash will always appear after the end of a directory name.

❖ Notes, technical tips, important notices, and cautions use these conventions:

Symbols	Description
	This is a note. It is used to bring special attention to information.
	This is a technical tip. It is used to identify information that can be used to make your tasks easier.
	This is an important notice. It is used to identify a required step or required information.
	This is a caution. It is used to identify information that might cause loss of data or serious system problems.

C h a p t e r

2

INSTALLATION

OVERVIEW

This section covers the following topics:

- ❖ Installation Summary on page 2-2

- ❖ Preparing a DB2 Database on page 2-2

- ❖ Installing the Common Utilities Bundle on page 2-4

- ❖ Installing the Adapter on page 2-6

- ❖ Restarting Content Server on page 2-8

- ❖ Rebuilding the Content Server Index on page 2-9

- ❖ Post-Installation Steps (page 2-10)

  - ❖ Defining an Outgoing Provider on page 2-10

  - ❖ Variable Settings for Unregistering a Source (page 2-10)

- ❖ Uninstalling the Adapter on page 2-11

INSTALLATION SUMMARY

Before installing the Adapter software, the following pre-installation tasks and considerations should be taken into account:

❖ You must ensure that Universal Records Manager, which includes Content Server, is installed on the URM server. For more information about the basic Adapter architecture, see Standard Installation Architecture on page 1-2. For installation information about URM, refer to the *Oracle Universal Records Manager Installation Guide*.

❖ If you are using DB2 as your database, some configuration changes may be necessary. See Preparing a DB2 Database on page 2-2.

❖ Before you install the Adapter, you must install the Common Utilities Bundle. See Installing the Common Utilities Bundle on page 2-4.

❖ After you have installed the Common Utilities Bundle, you will need to install the Adapter. See Installing the Adapter on page 2-6.

Caution: You CAN NOT install the Adapter for Content Server on a system that has either Records Manager Corporate Edition or Records Manager DoD Edition installed. Updating your system with the Adapter for Content Server IS NOT supported if you already have a Records Manager product installed.

❖ After you have installed the Adapter, you will need to restart Content Server. See Restarting Content Server on page 2-8.

❖ After you have restarted Content Server, you may need to rebuild the Content Server Search Index. See Rebuilding the Content Server Index on page 2-9.

❖ After you have rebuilt the search index, you will need to define an outgoing provider. See Defining an Outgoing Provider (page 2-10).

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 the Adapter 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.

Installation

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 THE COMMON UTILITIES BUNDLE

You can install and enable the Common Utilities Bundle components using either of the following methods:

❖ Installing the Common Utilities Bundle using Component Manager on page 2-4

❖ Installing the Common Utilities Bundle using Component Wizard on page 2-5

Installing the Common Utilities Bundle using Component Manager

To install the Common Utilities Bundle using Component Manager:

1. Log in to Content Server as an administrator.

2. Select **Admin Server** from the Administration menu.

3. Click the applicable Content Server instance button.

4. Click the **Component Manager** link.

   The Component Manager page is displayed.

5. Click **Browse**, navigate to the *CommonUtilitiesBundle.zip* file, select it, and click **Open**.

   The path is displayed in the Install New Component field.

6. Click **Install**.

   A list of component items that will be installed is displayed.

7. Click **Continue**.

   Component Manager asks if you want to immediately enable the Common Utilities Bundle or return to the Component Manager. Select the option to enable the Common Utilities Bundle.

8. Restart Content Server to apply the updated installation parameters. See Restarting Content Server on page 2-8.

Installing the Common Utilities Bundle using Component Wizard

To install the Common Utilities Bundle using Component Wizard:

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. On the Component List screen, click **Install**.

   The Install screen is displayed.

3. Click **Select**.

   The Zip File Path screen is displayed.

4. Navigate to the *CommonUtilitiesBundle.zip* file and select it.

5. Click **Open**.

   The zip file contents that will be installed are added to the Install screen list.

6. Click **OK**.

   Component Wizard asks if you want to enable the Common Utilities Bundle.

7. Click **Yes**.

   The Common Utilities Bundle is listed as enabled on the Component List screen.

8. Exit the Component Wizard.

9. Restart Content Server to apply the updated installation parameters. See Restarting Content Server on page 2-8.

INSTALLING THE ADAPTER

You can install and enable the Adapter component using either of the following methods:

❖ Installing the Adapter using Component Manager on page 2-6

❖ Installing the Adapter using Component Wizard on page 2-7

Installing the Adapter using Component Manager

To install the Adapter using Component Manager:

1. Log in to Content Server as an administrator.

2. Select **Admin Server** from the Administration menu.

3. Click the applicable Content Server instance button.

4. Click the **Component Manager** link.

   The Component Manager page is displayed.

5. Click **Browse**, navigate to the *UrmAgent.zip* file, select it, and click **Open**.

   The path is displayed in the Install New Component field.

6. Click **Install**.

   A list of component items that will be installed is displayed.

7. Click **Continue**.

   The Install Settings dialog is displayed and you are prompted to enable or disable the Retention Manager Email option. If you select this option, the Retention Manager Email component is installed.

   This component allows automatic capturing of e-mail information. It is used in conjunction with the Outlook Integration portion of the Desktop Integration Suite. For new installations, this option is enabled by default.

   The Retention Manager Email component is installed in the following directory:

   <install_dir>/custom/RmaEmail

8. Click **Continue**.

   Component Manager asks if you want to immediately enable the Adapter or return to the Component Manager. Select the option to enable the Adapter.

9. Restart Content Server to apply the updated installation parameters. See Restarting Content Server on page 2-8.

Installing the Adapter using Component Wizard

To install the Adapter using Component Wizard:

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. On the Component List screen, click **Install**.

    The Install screen is displayed.

3. Click **Select**.

    The Zip File Path screen is displayed.

4. Navigate to the *UrmAgent.zip* file and select it.

5. Click **Open**.

    The zip file contents that will be installed are added to the Install screen list.

6. Click **OK**.

    The Edit Preference Prompt dialog is displayed and you are prompted to enable or disable the Retention Manager Email option. If you select this option, the Retention Manager Email component is installed.

    This component allows automatic capturing of e-mail information. It is used in conjunction with the Outlook Integration portion of the Desktop Integration Suite. For new installations, this option is enabled by default.

    The Retention Manager Email component is installed in the following directory:

    <install_dir>/custom/RmaEmail

7. Click **OK**.

    Component Wizard asks if you want to enable the Adapter.

8. Click **Yes**.

   The Adapter is listed as enabled on the Component List screen.

9. Exit the Component Wizard.

10. Restart Content Server to apply the updated installation parameters. See Restarting Content Server on page 2-8.

RESTARTING CONTENT SERVER

Whenever you add and enable a new component, you need to restart 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 Content Server by reinitiating the services (Windows) or by reinitiating the processes (UNIX).

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

To restart Content Server using the Admin Server, complete the following steps:

1. 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 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 Adapter 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 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 the Adapter10*g*R3 adds custom metadata fields to the content server. For an overview of these fields, see Appendix A (*Metadata Fields*). After installing the Adapter for the first time, you need to rebuild the Verity search index.

Please note the following:

❖ After installing the Adapter for the first time, you *must* rebuild the search index to ensure the Adapter functions 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.

POST-INSTALLATION STEPS

This section covers the following topics:

- ❖ Defining an Outgoing Provider (page 2-10)
- ❖ Variable Settings for Unregistering a Source (page 2-10)

Defining an Outgoing Provider

After you have successfully installed the Adapter, you will need to set up an outgoing provider on the Adapter server that enables the Adapter to connect to the URM server. You will be prompted to set up the outgoing provider when you access the URM Agent Administration application. See Defining the Adapter's Outgoing Provider (page 3-4) and the Add Provider Screen (page 3-11).

Variable Settings for Unregistering a Source

The value of the IsUrmAgentAllowUnregister variable determines if the Unregister Source Action menu will appear on the Source Information toolbar. For additional information on Unregistering a Source, see Unregistering the External URM Source (page 3-7) . The format for the variable is:

IsUrmAgentAllowUnregister=1 allows the Unregister Source Action menu to be visible on the Source Information toolbar.

To set these Content Server configuration variable, complete the following steps:

1. Open a new browser window and log into Content Server as a system administrator.

2. Click the **Admin Server** link in the Administration tray.

3. On the Content Admin Server page, click the button of the content server instance where URM is installed. The status page for the content server instance is displayed.

4. In the option list for the server instance, click the **General Configuration** link. The General Configuration page is displayed.

5. To allow the Unregister Source Action menu to be visible, add this variable in the Additional Configuration Variables field and set the value to 1 (true):

   IsUrmAgentAllowUnregister=1

6. Click **Save**.

7. Restart the content server.

> **Tech Tip:** While it is recommended that you set Content Server configuration variables using Admin Server, Content Server configuration variables can also be set by editing the *config.cfg* file located in the *<install_dir>/config* directory.

UNINSTALLING THE ADAPTER

Uninstalling the Adapter software consists of the following steps:

❖ Determine the components to be uninstalled. See Components To Be Uninstalled on page 2-11.

❖ Uninstall the component in either of two ways:

- Uninstalling the Adapter using Component Manager on page 2-12.
- Uninstalling the Adapter using Component Wizard on page 2-13.

❖ Perform any post-installation steps. See Post-Uninstallation Steps on page 2-14.

Components To Be Uninstalled

Depending on the options selected during the Adapter installation, the components associated with the Common Utilities Bundle and the Adapter for Content Server may need to be uninstalled.

❖ Common Utilities Bundle components:
- CommonUtilitiesBundle
- ComponentDBInstall
- CustomSecurityRights
- Helper
- JavascriptLibrary
- MetadataSet
- MultiSort
- ScheduledTimeEvents
- SimpleProfiles

❖ Adapter for Content Server components:
- AdvancedOptionsLists
- CheckSCSHealth
- ConfigMigrationUtility
- FileResultSetComponent
- NativeOsUtils
- PopUpCalendar
- RecordsManagement
- RelatedContent
- ReportMaker

- RetentionManager
- RmaEmail
- SearchAndTag
- UIEnhancements
- UrmAgent
- WebUrlMapPlugin
- WsdlGenerator
- YahooUserInterfaceLibrary
- Comptool

Uninstalling the Adapter using Component Manager

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

1. Log in to 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 Adapter and supplemental 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. Select the component in the Enabled Components list that you want to uninstall. See Components To Be Uninstalled (page 2-11):

6. Click the **Disable** button to move the selected component to the Disabled Components list.

7. Click the **Start/Stop Content Server** link on the Component Manager page.

   The Content Admin Server <*instance_name*> page is displayed.

8. Restart Content Server. See Restarting Content Server (page 2-8).

9. Click the **Component Manager** link.

10. Select the disabled component to be uninstalled in the Uninstall Component drop-down list, and click **Uninstall**.

    A prompt is displayed asking you to confirm the uninstallation process.

11. Click **OK** to confirm.

Component Manager displays a message that the component was uninstalled successfully.

12. Click the link to return to Component Manager.

    The Component Manager page is displayed.

13. Click **Start/Stop Content Server** link on the Component Manager page.

    The Content Admin Server *<instance_name>* page is displayed.

14. Restart Content Server to apply the changes. See Restarting Content Server (page 2-8).

15. Repeat steps 5 through 14 for each Adapter component that you want to uninstall. See Components To Be Uninstalled on page 2-11.

Uninstalling the Adapter using Component Wizard

To uninstall the Adapter 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. On the Component List screen, select the component that you want to disable. See Components To Be Uninstalled (page 2-11).

3. Click **Disable**.

   The selected component's status is changed to disabled.

4. Restart Content Server. See Restarting Content Server on page 2-8.

5. On the Component List screen, select the component to be uninstalled.

6. Click **Uninstall**.

   A prompt is displayed asking you to confirm the uninstallation process.

7. Click **Yes** to confirm.

The Uninstall screen is displayed and lists the zip file contents that will be uninstalled.

8. Click **OK**.

   The component is removed from the Component List screen.

9. Repeat steps 2 to 8 for each Adapter component that you want to uninstall.

10. After uninstalling the last component, exit the Component Wizard.

11. Restart Content Server to apply the changes. See Restarting Content Server (page 2-8).

Post-Uninstallation Steps

After the Adapter 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 content retention management, see Appendix A (*Metadata Fields*).

You can remove or hide the Adapter metadata fields using one of the following methods:

❖ Disabling the Adapter Metadata Fields (page 2-14)

❖ Deleting the Adapter Metadata Fields (page 2-15)

Disabling the Adapter Metadata Fields

To disable the Adapter metadata 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`.

   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 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 the Adapter Metadata Fields

To delete the Adapter metadata 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.

3

CONFIGURATION

OVERVIEW

This section covers the following topics:

Concepts

❖ About Content Retention Management (page 3-2)

❖ The External URM Source (page 3-3)

❖ External URM Source Registration (page 3-3)

Tasks

❖ Defining the Adapter's Outgoing Provider (page 3-4)

❖ Editing the Adapter's Outgoing Provider (page 3-5)

❖ Disabling the Adapter's Outgoing Provider (page 3-5)

❖ Deleting the Adapter's Outgoing Provider (page 3-6)

❖ Registering the External URM Source (page 3-6)

❖ Unregistering the External URM Source (page 3-7)

❖ Adding a URM Custom Metadata Field (page 3-7)

❖ Editing an Existing URM Custom Metadata Field (page 3-8)

❖ Configuring/Editing Disposition Actions (page 3-9)

❖ Scheduling Events to Run Automatically (page 3-9)

Interface

ABOUT CONTENT RETENTION MANAGEMENT

This section covers the following topics:

The External URM Source

The external URM source is from URM's perspective. The term 'source' is intended to represent an external repository that stores documents. In this case, the source is the Adapter server's repository. The documents in this source (repository) are allocated for retention management under URM. For the Adapter server's repository, there is a single external URM Source that is designated for the entire Adapter system.

Presumably, the Adapter server's repository contains a wide variety of documents. Consequently, when the documents are classified into similar groups, there will be a wide variety of retention categories associated with the content items in the external URM Source. Thus, the content items in the URM Source share two characteristics: they are all derived from one repository and they all have the same default Mapped Metadata Fields on page A-3.

External URM Source Registration

After you have created the outgoing provider on the Adapter server, the URM Agent Administration application automatically displays the Register Source Screen (page 3-12).

The following events occur after you register the external URM source:

❖ A current retention schedule is downloaded from the URM server and incorporated into Adapter server's content retention management system.

❖ The content items in the Adapter server's repository prior to installing the Adapter are not automatically assigned to retention categories. This must be done manually using the Content Server's Batch Loader and/or Archiver. For more detailed information about these utilities, refer to Content Server's *Managing Repository Content* guide.

❖ New content items checked into the Adapter server can be assigned to appropriate retention schedules during the checkin process.

CONFIGURING THE ADAPTER

This section covers the following topics:

❖ Defining the Adapter's Outgoing Provider (page 3-4)

❖ Editing the Adapter's Outgoing Provider (page 3-5)

❖ Disabling the Adapter's Outgoing Provider (page 3-5)

Defining the Adapter's Outgoing Provider

After you have completed the Adapter installation process, you must define an outgoing provider on the Adapter server that enables the Adapter to connect to the URM server. If you

To define an outgoing provider:

1. In the Administration tray, select **URM Agent Administration**.

   If this is the first time that you have accessed the URM Agent Administration application, the Add Provider Screen (page 3-11) is displayed.

   Otherwise, if you have already defined the outgoing provider and registered the external URM source, the Source Information Screen (page 3-24) is displayed. In this case, you will need to edit the existing outgoing provider. See Editing the Adapter's Outgoing Provider (page 3-5).

2. On the Add Provider screen, enter the required information in the applicable fields.

   Note: Optionally, you can click the Show Expanded View link that will open the Content Server's full Add Outgoing Provider page. This page offers you additional configuration options for the Adapter server's outgoing provider. For more detailed information about outgoing providers in general and the Add Outgoing Provider page, refer to the Content Server's *Managing System Settings and Processes* guide.

3. Click **Add** to save the configured settings.

Editing the Adapter's Outgoing Provider

To edit an existing outgoing provider on the Adapter server:

1. In the Administration tray, select **URM Agent Administration**.

    The Source Information Screen (page 3-24) is displayed.

2. Select **Provider Information** from the Info drop-down menu on the toolbar.

    The Outgoing Provider Information Screen (page 3-25) is displayed.

3. Click **Edit**.

    The populated Edit Provider screen is displayed.

4. Change the field values as necessary.

5. Click **Save**.

Disabling the Adapter's Outgoing Provider

To disable an existing outgoing provider on the Adapter server:

1. In the Administration tray, select **URM Agent Administration**.

    The Source Information Screen (page 3-24) is displayed.

2. Select **Provider Information** from the Info drop-down menu on the toolbar.

    The Outgoing Provider Information Screen (page 3-25) is displayed.

3. Click **Disable**.

    You are prompted to confirm your choice.

4. Click **OK**.

    The outgoing provider is disabled.

Deleting the Adapter's Outgoing Provider

💡 **Note:** The Adapter does not allow you to delete the outgoing provider if it is linked to an external URM source. You must first undo this link before deleting the outgoing provider.

To delete an existing outgoing provider on the Adapter server:

1. In the Administration tray, select **URM Agent Administration**.

    The Source Information Screen (page 3-24) is displayed.

2. Select **Provider Information** from the Info drop-down menu on the toolbar.

    The Outgoing Provider Information Screen (page 3-25) is displayed.

3. Click **Delete**.

    You are prompted to confirm your choice.

4. Click **OK**.

    The outgoing provider is removed from the Content Server's Providers table. Refer to the Content Server's *Managing System Settings and Processes* guide.

Registering the External URM Source

To register the external URM source:

1. In the Administration tray, select **URM Agent Administration**.

    The Register Source Screen (page 3-12) is displayed.

2. Specify the Provider Name.

3. Specify the Source Name.

4. Specify the Source Display Name.

5. Specify the Source Table Name.

6. Click **Register**.

    The Configure Custom Fields Screen (page 3-13) is displayed.

7. Specify whether to configure custom metadata fields, and click the right arrow to progress through the wizard.

    The Configure Disposition Actions Screen (page 3-18) is displayed.

8. Specify disposition actions, and click the right arrow to progress through the wizard.

   The Configure Scheduled Events Screen (page 3-20) is displayed.

9. Click **Save**.

Unregistering the External URM Source

> ⊗ **Caution:** You must make sure that you want to delete your registered external URM source. When you click this action option on the Source Information toolbar, the Adapter prompts you to confirm whether you want to unregister (delete) the source. When you confirm your choice, the Adapter immediately deletes the current external URM source. The unregistration (deletion) process is permanent—it cannot be reversed.

To unregister (delete) the external URM source:

1. In the Administration tray, select **URM Agent Administration**.

   The Source Information Screen (page 3-24) is displayed.

2. Select the **Unregister Source** action item on the toolbar.

   The external URM source is deleted. The next time you access the URM Agent Administration application, the Register Source Screen (page 3-12) is displayed.

Adding a URM Custom Metadata Field

To add a URM custom metadata field:

1. In the Administration tray, select **URM Agent Administration**.

   The Source Information Screen (page 3-24) is displayed.

2. Select **Custom Fields** from the Configure drop-down menu on the toolbar.

   The Configure Custom Fields Screen (page 3-13) is displayed.

3. Click **Add**.

   The Add Custom Field Screen (page 3-15) is displayed.

4. Enter the required information in the applicable fields and specify whether the custom metadata fields is required, enabled, and searchable.

5. Click **Add**.

   The custom metadata field is added to the list of custom metadata fields on the Configure Custom Fields screen.

Editing an Existing URM Custom Metadata Field

To edit a URM custom metadata field:

1. In the Administration tray, select **URM Agent Administration**.

    The Source Information Screen (page 3-24) is displayed.

2. Select **Custom Fields** from the Configure drop-down menu on the toolbar.

    The Configure Custom Fields Screen (page 3-13) is displayed.

3. Select a metadata field from the list, and click **Edit**.

    The Edit Custom Field Screen (page 3-17)is displayed.

4. Enter the required information in the applicable fields and specify whether the custom metadata fields is required, enabled, and searchable.

5. Click **Update**.

    The changed configuration settings for the existing custom metadata field are saved. and the Configure Custom Fields screen is displayed.

6. Reorder the fields as necessary, and click **Save**.

Configuring/Editing Disposition Actions

To configure disposition actions:

1. In the Administration tray, select **URM Agent Administration**.

   The Source Information Screen (page 3-24) is displayed.

2. Select **Disposition Actions** from the Configure drop-down menu on the toolbar.

   The Configure Disposition Actions Screen (page 3-18) is displayed.

3. Enable the check boxes to specify the disposition actions.

4. Click **Save**.

Scheduling Events to Run Automatically

To schedule events to automatically run at predetermined times:

1. In the Administration tray, select **URM Agent Administration**.

   The Source Information Screen (page 3-24) is displayed.

2. Select **Scheduled Events** from the Configure drop-down menu on the toolbar.

   The Configure Scheduled Events Screen (page 3-20) is displayed.

3. Specify the number of days and the time for which the specified tasks should be scheduled.

4. Click **Save**.

Running Scheduled Events Manually

To manually run scheduled events:

1. In the Administration tray, select **URM Agent Administration**.

   The Source Information Screen (page 3-24) is displayed.

2. In the Batch Services drop-down menu on the toolbar, select the specific service you want to run. See Batch Services Menu Options (page 3-23).

   The Adapter immediately runs the selected service.

Viewing the Configuration Settings for the External URM Source

To view the external URM source configuration settings:

1. In the Administration tray, select **URM Agent Administration**.

    The Source Information Screen (page 3-24) is displayed.

2. Select **Source Information** from the Info drop-down menu on the toolbar.

    The Source Information Screen (page 3-24) is displayed.

Viewing the Configuration Settings for the Outgoing Provider

To view and/or edit the outgoing provider configuration settings:

1. In the Administration tray, select **URM Agent Administration**.

    The Source Information Screen (page 3-24) is displayed.

2. Select **Provider Information** from the Info drop-down menu on the toolbar.

    The Outgoing Provider Information Screen (page 3-25) is displayed.

3. To edit, disable, or delete the current outgoing provider, see Editing the Adapter's Outgoing Provider (page 3-5), Disabling the Adapter's Outgoing Provider (page 3-5), and Deleting the Adapter's Outgoing Provider (page 3-6), respectively.

THE ADAPTER USER INTERFACE

This section covers the following topics:

❖ Add Provider Screen (page 3-11)

❖ Register Source Screen (page 3-12)

❖ Configure Custom Fields Screen (page 3-13)

❖ Add Custom Field Screen (page 3-15)

❖ Edit Custom Field Screen (page 3-17)

❖ Configure Disposition Actions Screen (page 3-18)

❖ Configure Scheduled Events Screen (page 3-20)

Add Provider Screen

Use the Add Provider screen to define the outgoing provider that enables the Adapter server to connect to the URM server. This screen is a shortened version of Content Server's full Outgoing Provider page. If you prefer to define the Adapter server's outgoing provider using the full Outgoing Provider page, click the Show Expanded View link.

Feature	Description
Provider Name field	The name of the outgoing provider for the Adapter server. **Note:** All special characters and hyphens are illegal characters for the outgoing provider's name.
Show Expanded View link	This link opens the Content Server's full Add Outgoing Provider page. This page offers you additional configuration options for the Adapter server's outgoing provider. For more detailed information about outgoing providers in general and the Add Outgoing Provider page, refer to the Content Server's *Managing System Settings and Processes* guide.
Server Host Name field	The server host name of the content server instance on the URM server.
Server Port field	The port on which the provider communicates with the content server instance on the URM server.

| Feature	Description
Instance Name field	The instance name of the content server instance on the URM server.
Relative Web Root field	The relative web root of the content server instance on the URM server
Add button	Saves the configuration settings and adds the outgoing provider to the Content Server's Providers table.
Reset button	Clears any populated fields on the screen and resets the screen fields to their initial default settings.

Register Source Screen

Use the Register Source screen to register the external URM source. As soon as you register the external URM source, the URM server's retention schedule is downloaded and integrated into the Adapter server's retention management system. For more information about the external URM source and registration events, see The External URM Source on page 3-3 and External URM Source Registration (page 3-3).

Note: You can only register one source for an Adapter instance. If you need to change the configuration settings of the registered source, you must delete (unregister) the current source and register a new source.

Feature	Description
Provider Name field	The name of the outgoing provider that was configured for communication between the Adapter server and the URM server. See Provider Name field on page 3-11.
Source Name field	The name of the URM source to be created on the URM server.
Source Display Name field	The descriptive name used to identify the URM source. It is displayed on the content server's Search <*source_name*> page on the URM server. If you do not supply a display name value, then, by default, the value in the Source Name field is used.
Source Table Name field	The prefix of the database tables that are created for the URM source. If you do not supply a prefix name, then, by default, the value in the Source Name field is used.
Register button	Registers the Adapter with URM. Registration ensures that URM is aware of the Adapter and is ready to manage the stored content in the Adapter server's repository.
Reset button	Clears any populated fields on the screen and resets the screen fields to their initial default settings.

Configure Custom Fields Screen
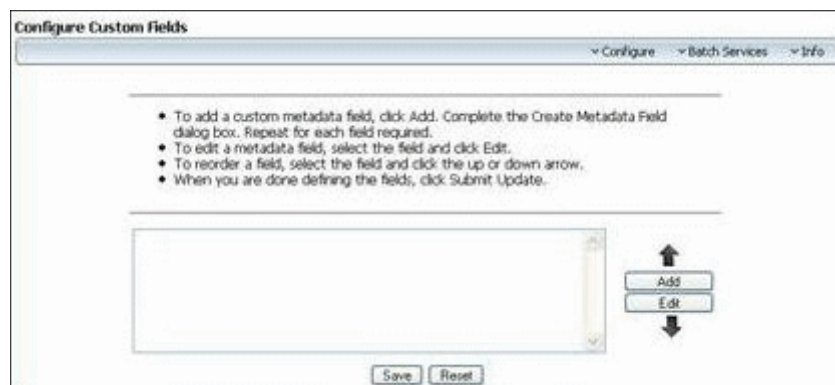
Use the Configure Custom Fields screen to create and define URM custom metadata fields for the URM source. The custom metadata fields enable you to include supplemental information about retained items in addition to the values of the default mapped metadata fields. For more information about the default mapped metadata fields and custom metadata fields, see Mapped Metadata Fields (page A-3) and Custom Metadata Fields (page A-3).

Feature	Description
Configure toolbar menu	Displays the Configure Menu Options (page 3-22).
Batch Services toolbar menu	Displays the Batch Services Menu Options (page 3-23).
Info toolbar menu	Displays the Info Menu Options (page 3-23).
URM custom metadata fields pane	Lists the available URM custom metadata fields that can be edited or deleted, as necessary.
Add button	Displays the Add Custom Field Screen on page 3-15. Used to create new URM custom metadata fields.
Edit button	Displays the Edit Custom Field Screen on page 3-17 for an existing URM custom metadata field and enables you to modify the settings.
Up/down arrows	Used to adjust the specific placement order of the selected URM custom metadata field. The position of each custom field in the list is relevant to its priority on the Item Information page in URM.
Save button	Saves the configured settings for all of the URM custom metadata fields listed in the URM custom metadata fields pane.
Reset button	Clears any populated fields on the screen and resets the screen fields to their initial default settings.

Add Custom Field Screen

Use the Add Custom Field screen to define new URM custom metadata fields. This screen is displayed when you click the Add button on the Configure Custom Fields Screen (page 3-13).

Feature	Description
Name field	Enter the name of the URM custom metadata field to be created.
Internal Name drop-down list	Lists the Adapter's available custom metadata fields that can be mapped to URM custom metadata fields. **Note:** You can either select a metadata field in the drop-down list or enter a different name. If you enter a new name, the Adapter automatically creates a corresponding custom metadata field for the name.
Caption field	The descriptive name of the URM custom metadata field that is displayed on the Item Information page in URM.

Feature	Description
Type drop-down list	Lists the available classification types of information that can be used as the value for this URM custom metadata field. Possible values include:
Default Value field	The assigned value for the URM custom metadata field.
Required check box	**Selected**—Prevents content from being accepted into URM if users do not enter a value for the URM custom metadata field. **Clear**—Allows content to be accepted into URM without entering a value for the URM custom metadata field. This is the default value.
Enabled check box	**Selected**—Configures the URM custom metadata field to be displayed on the Item Information page in URM. This is the default value. **Clear**—Ensures that the URM custom metadata field is not displayed on the Item Information page in URM.
Searchable check box	**Selected**—Enables users to use the URM custom metadata field as search criteria. This is the default value. **Clear**—The URM custom metadata field cannot be used as search criteria.
Add button	Saves the settings and adds the new URM custom metadata field to the URM custom metadata fields pane (page 3-14) on the Configure Custom Fields Screen (page 3-13).
Reset button	Clears any populated fields on the screen and resets the screen fields to their initial default settings.

Edit Custom Field Screen

Use the Edit Custom Field screen to change the settings of existing URM custom metadata fields. This screen is displayed when you click the Edit button on the Configure Custom Fields Screen (page 3-13).

Feature	Description
Name field	The name of the URM custom metadata field to be created. This field is not editable.
Internal Name drop-down list	Lists the Adapter's available custom metadata fields that can be mapped to URM custom metadata fields. **Note:** You can either select a metadata field in the drop-down list or enter a different name. If you enter a new name, the Adapter automatically creates a corresponding custom metadata field for the name.
Caption field	The descriptive name of the URM custom metadata field that is displayed on the Item Information page in URM.
Type drop-down list	Lists the available classification types of information that can be used as the value for this URM custom metadata field. Possible values include:

Configuration

Feature	Description
Default Value field	The assigned value for the URM custom metadata field.
Required check box	**Selected**—Prevents content from being accepted into URM if users do not enter a value for the URM custom metadata field. **Clear**—Allows content to be accepted into URM without entering a value for the URM custom metadata field. This is the default value.
Enabled check box	**Selected**—Configures the URM custom metadata field to be displayed on the Item Information page in URM. This is the default value. **Clear**—Ensures that the URM custom metadata field is not displayed on the Item Information page in URM.
Searchable check box	**Selected**—Enables users to use the URM custom metadata field as search criteria. This is the default value. **Clear**—The URM custom metadata field cannot be used as search criteria.
Update button	Saves the changed settings for the existing URM custom metadata field.
Reset button	Clears any populated fields on the screen and resets the screen fields to their initial default settings.

Configure Disposition Actions Screen

Use the Configure Source Disposition Actions screen to specify the disposition actions for the Adapter to mark complete. For example, if you select the Expire disposition action, the Adapter sets the expiration date on the associated content item.

When using URM, if a disposition comes up for action, you must approve it and then the action is processed. When using the adapter with URM, if you mark one of these actions, you must run a Mark Complete action on the adapter in order for the actions to be processed.

Feature	Description
Configure toolbar menu	Displays the Configure Menu Options (page 3-22).
Batch Services toolbar menu	Displays the Batch Services Menu Options (page 3-23).
Info toolbar menu	Displays the Info Menu Options (page 3-23).
Approve Deletion	This action sets the approved delete date of the content item. Select this action if you want the adapter to maintain the approved delete date.
Cutoff	This action sets the cutoff date of the content item. Select this action if you want the adapter to maintain the cutoff date.
Expire	This action sets the expiration date of the content item. Select this action if you want the adapter to maintain the expiration date.
No Action	This action acknowledeges that the disposition milestone has passed and the next step in the disposition has begun.
Notify Authors	This action notifies the original content authors.
Check In New Revision	This action will check in a new revision of the content item.
Activate	This action sets the activation date of the content item. Select this action if you want the adapter to maintain the activation date.

| Feature	Description
Obsolete	This action sets the obsolete date of the content item. Select this action if you want the adapter to maintain the obsolete date.
Save button	Saves the selected settings.
Reset button	Clears any populated fields on the screen and resets the screen fields to their initial default settings.

Configure Scheduled Events Screen

Use the Configure Scheduled Times screen to establish the frequency and times that the Adapter must perform the management actions. You can schedule the Adapter to perform each function on a daily or hourly basis and set the specific range of hours.

In addition to scheduling specific intervals for the Adapter to run these events, you can also run each event manually. For more information about manually running these events, see Batch Services Menu Options (page 3-23) and Running Scheduled Events Manually (page 3-9).

Feature	Description
Retention Retention Schedule	Updates the Adapter's retention schedule based on the URM server's retention schedule. **Note:** When updateing the retention schedule, URM only pushes cagtegories to the Adapter server. URM does not push category folders to the Adapter server.
Content Upload	Uploads the metadata of any new or modified content items into the URM server as external items.
Freeze	Gathers all the external content items that were frozen on the URM server and freezes the corresponding Adapter content items.
Unfreeze	Gathers all the external items that were unfrozen on the URM server and unfreezes the corresponding Adapter content items.
Mark Complete Actions	Marks complete any disposition actions pending on the URM server and update the Agent server content items according to the disposition action.
Upload Archive	Determines if any archive disposition actions are awaiting to be marked complete and will upload a zip file from the Adapter to the URM server containing the content items that need to be archived.
Save button	Saves the selected settings.
Exit Wizard button	Exits the Adapter configuration wizard.
Reset button	Clears any populated fields on the screen and resets the screen fields to their initial default settings.

SOURCE INFORMATION TOOLBAR MENUS

As soon as you have installed the Adapter software, when you access the URM Agent Administration application the first time, the Adapter expects you to immediately define

an outgoing provider and register the external URM source. Once these tasks are complete, the next time you access the URM Agent Administration application, the Source Information Screen (page 3-24) and its toolbar menus are displayed.

The Adapter's Source Information toolbar provides the following toolbar menus:

❖ Configure Menu Options (page 3-22)

❖ Batch Services Menu Options (page 3-23)

❖ Info Menu Options (page 3-23)

❖ Unregister Source Action (page 3-25)

Configure Menu Options
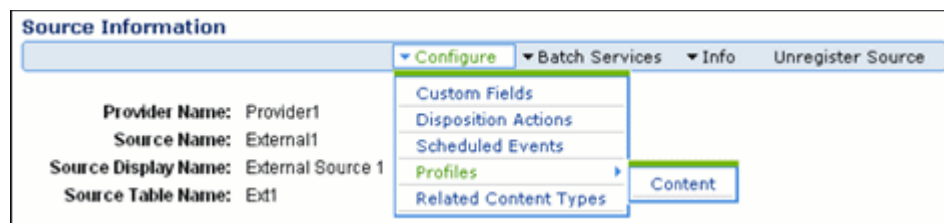
The Configure toolbar menu enables you to edit the previous configuration values that you set on the Configure Custom Fields Screen (page 3-13), the Configure Disposition Actions Screen (page 3-18), and the Configure Scheduled Events Screen (page 3-20).

This menu also provides options that enable you to:

❖ Create and update new or existing content profiles. You can use content profiles to customize the displayed metadata fields on Content Server's Check In, Update, Content Information, and Search pages. For more detailed information about content profiles, refer to the *Simple Profiles Component Guide* and the *Managing Repository Content* guide.

❖ Add or edit new or existing related content link types. The Related Content component enables you to create links between individual content items. For more detailed information about related content link types, refer to the *Related Content Component Administration Guide*.

See also:

❖ Adding a URM Custom Metadata Field (page 3-7)

❖ Editing an Existing URM Custom Metadata Field (page 3-8)

❖ Configuring/Editing Disposition Actions (page 3-9)

❖ Scheduling Events to Run Automatically (page 3-9)

❖ Running Scheduled Events Manually (page 3-9)

Batch Services Menu Options
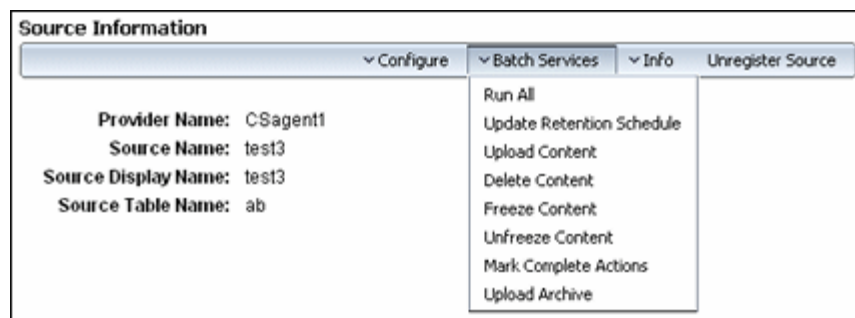
The Batch Services toolbar menu enables you to manually run any of the batch services included on the Scheduled Events screen—see Configure Scheduled Events Screen (page 3-20). If you choose to manually perform a service by selecting it from the Batch Services menu, the Adapter executes the selected service immediately.

Note: Manually running a batch service from the toolbar menu is in addition to the scheduled event and does not override the previously scheduled services. The Adapter runs all of the scheduled batch services as configured whether or not they are run manually. See also Running Scheduled Events Manually (page 3-9).

Info Menu Options
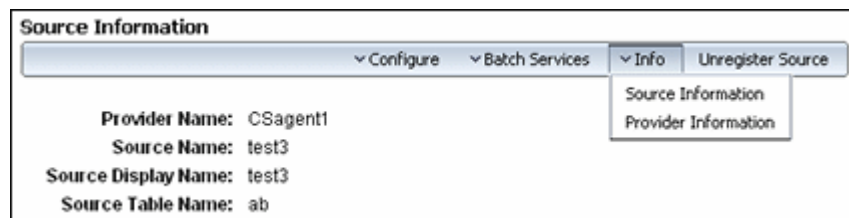
The Info toolbar menu enables you to view the configuration settings for the:

❖ External URM source—Source Information Screen (page 3-24).

❖ Current outgoing provider—Outgoing Provider Information Screen (page 3-25).

Source Information Screen
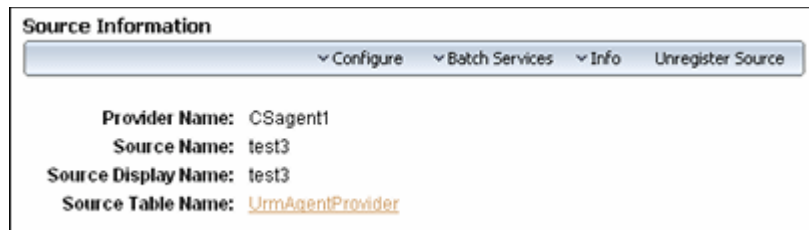
After you have defined an outgoing provider and configured the external URM source, the next time you access the URM Agent Administration application, the Source Information screen is displayed. It enables you to view the configuration settings for the external URM source and includes the toolbar menus and their respective menu options:

❖ Configure Menu Options (page 3-22)

❖ Batch Services Menu Options (page 3-23)

❖ Info Menu Options (page 3-23)

❖ Unregister Source Action (page 3-25)

Note: The Unregister Source Action menu will not appear if the IsUrmAgentAllowUnregister configuration variable has not been set. For additional information, see Variable Settings for Unregistering a Source (page 2-10) .

Outgoing Provider Information Screen

The Provider Information screen enables you to view the configuration settings for the outgoing provider. The outgoing provider is configured on the Adapter server and enables the Adapter to connect to the URM server. After defining the initial outgoing provider, you can use this screen to reconfigure it by:

❖ Editing the Adapter's Outgoing Provider (page 3-5)

❖ Disabling the Adapter's Outgoing Provider (page 3-5)

❖ Deleting the Adapter's Outgoing Provider (page 3-6)

Unregister Source Action

The Unregister Source action item on the toolbar enables you to immediately delete (unregister) the external URM source.

Caution: You must make sure that you want to delete your registered external URM source. When you click this action option on the Source Information toolbar, the Adapter prompts you to confirm whether you want to unregister (delete) the source. When you confirm your choice, the Adapter immediately deletes the current external URM source. The unregistration (deletion) process is permanent—it cannot be reversed.

BROWSING THE RETENTION SCHEDULE

OVERVIEW

This section covers the following topics:

Concepts

Tasks

Interface

❖ Retention Schedule Menu Options (page 4-10)

❖ Content Information Page for Retained Items (page 4-12)

ABOUT RETENTION SCHEDULES

A retention schedule is an organized hierarchy of series and categories that enables you to cluster retained items into similar groups, each with its own retention and disposition characteristics. In the Adapter, there can be as many retention schedules as necessary for the requirements mandated by your organization. Retention schedules are set up to make it easy for you to accurately manage retained items.

When you file a retained item into a retention schedule, the disposition of that retained item is determined by the category into which it is filed. Additionally, the category into which the content item is filed determines the security access and status of the retained item (for example, whether or not the retained item is subject to review, or whether the record is permanent).

If you do not want the retained item to inherit the security and status of the category, but want the retained item or record to be filed in a specific location, you can change the security or status either while you are filing it or after it has been filed.

This section covers the following topics:

❖ Retention Schedule Hierarchy on page 4-2

❖ Retention Schedule Navigation on page 4-3

Retention Schedule Hierarchy
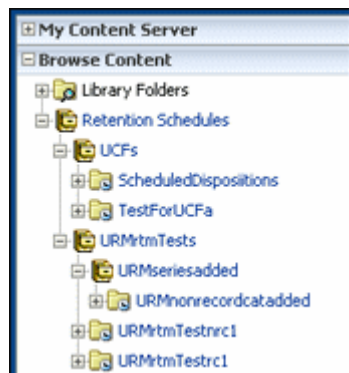
A typical hierarchy of a retention schedule consists of:

❖ Series on page 4-3

❖ Retention Category on page 4-3

Series

A series is an optional organizational construct in the retention schedule which enables you to organize categories into functional groups. This is especially useful if you have a multitude of categories. Series cannot contain content items. A series can be nested, which means a series may contain other series.

Retention Category

A retention category is a set of security settings and disposition instructions in the retention schedule hierarchy, below a series. This enables you to organize content into groups with the same retention and disposition characteristics. Categories define the disposition instructions of the retained items.

A retention category may contain one or more content items, which then typically follow the security settings and disposition rules associated with that retention category. Categories can be created within a series, but a category cannot be contained within another category, which means a retention category cannot contain other retention categories. Retention categories cannot be nested because the disposition rules for each category may conflict.

Retention Schedule Navigation

You can browse content and navigate the hierarchy in the retention schedule using various techniques. Your permissions and security configuration determine what portions of the schedule you can view. You can navigate by:

❖ Accessing Retention Schedules Using the Browse Content Tray (page 4-4)

❖ Accessing Retention Schedules Using a Search Result (page 4-4)

❖ Accessing Retention Schedules Using Breadcrumb Trails (page 4-5)

Accessing Retention Schedules Using the Browse Content Tray
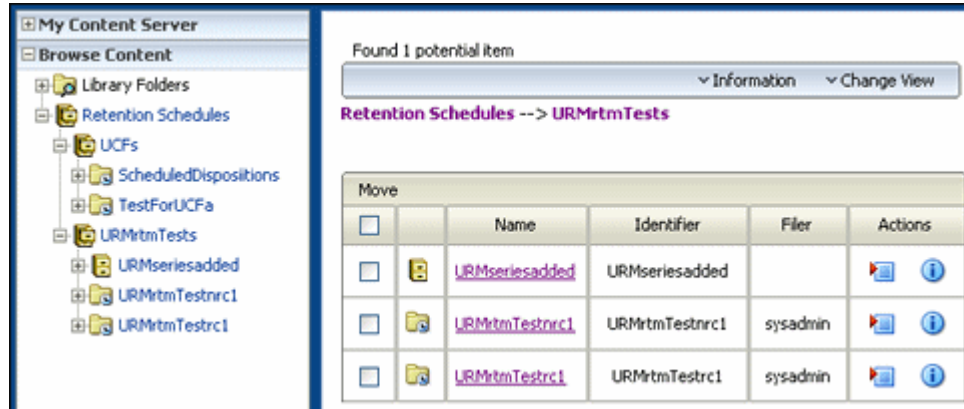
When you click the objects in the Browse Content area in Content Server, the tree expands or collapses. By default, retained items and records can be accessed in the retention schedule object. The search page displays the contents of the selected series or category.

Accessing Retention Schedules Using a Search Result
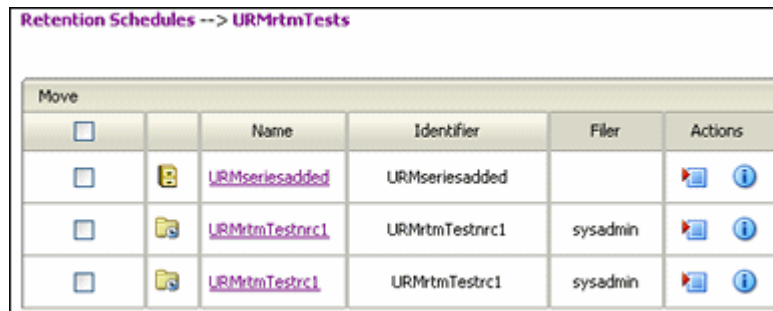
You can click the link in the Name column on a search results page to navigate to child objects. For example, clicking on the link "URMrtmTestnrc1" shown in the figure above enables you to open the corresponding Exploring Retention Category page (for example, see the figure in Accessing Retention Schedules Using Breadcrumb Trails on page 4-5).

Hover the mouse pointer over the name of a category to quickly view its description. Descriptions over 100 characters are truncated in the popup for easier viewing within the screen. To view the full description of a category, you must view it on the relevant information page. For more information, see Viewing the Information Page for a Retention Category (page 4-6). Series do not have descriptions.

Accessing Retention Schedules Using Breadcrumb Trails

The breadcrumb trail provides a convenient means of navigating a retention schedule. It shows where you are in the schedule hierarchy, and provides links that you can click to quickly move between parent and child levels.

For example, clicking "Series 0031 Combatant Command, etc. Correspondence" in the figure above opens the Exploring screen at the series level.

ACCESSING RETENTION SCHEDULE INFORMATION

This section covers the following topics:

❖ Viewing the Information Page for a Retention Category on page 4-6

❖ Viewing Metadata History for a Retention Category on page 4-7

❖ Viewing Disposition Information for a Retention Category on page 4-8

❖ Viewing the Content Information of a Retained Item on page 4-8

❖ Generating a Retention Schedule Report on page 4-9

Viewing the Information Page for a Series

The Series Information page shows relevant information about the selected series.

To view information about a series in the retention schedule, complete the following steps:

1. Open the **Browse Content** tray on the left and click the **Retention Schedules** link.

   The Exploring Series "Retention Schedules" page is displayed.

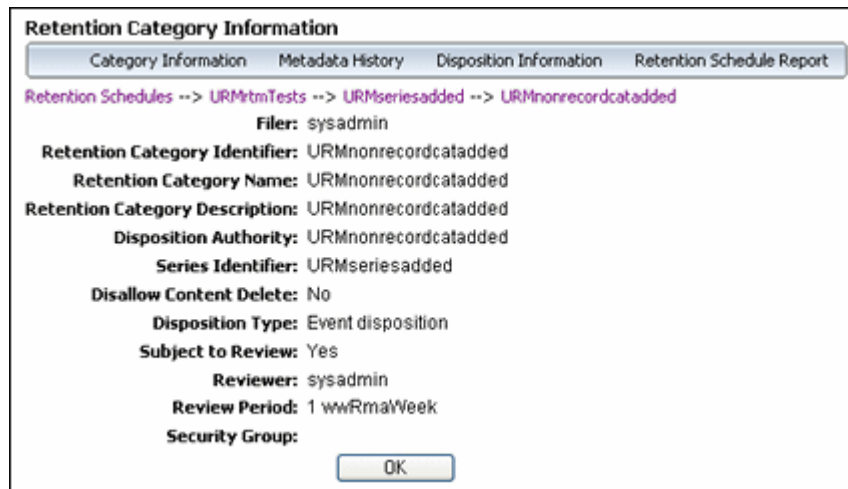2. Navigate to the series for which to see information.

3. In the row for the series, do either of the following:

   • Click the Info icon.

   • Click the Actions icon, and choose **Series Information** from the popup.

   The Series Information page is displayed.

4. When you are done viewing the disposition information, click **OK**.

Viewing the Information Page for a Retention Category

The Category Information page provides relevant information about the selected retention category.

To view category information about a retention category, complete the following steps:

1. Open the **Browse Content** tray on the left and click the **Retention Schedules** link.

2. Navigate to the category for which to see information.

3. In the row for the category, do either of the following:

   • Click the Info icon

   • Click the Actions icon, and choose **Category Information** from the popup menu.

   The Category Information page is displayed.

4. When you are done viewing the metadata history information, click **OK**.

Viewing Metadata History for a Retention Category

The Metadata History page provides the metadata history of a retention category (i.e., a list of all changes to the metadata of that retention category).

To view the metadata history for a retention category, complete the following steps:

1. Open the **Browse Content** tray and click the **Retention Schedules** link.

   The Exploring Series "Retention Schedules" page is displayed.

2. Navigate to the retention category for which to view disposition information.

3. In the row for the retention category, click the Actions icon, and choose **Metadata History** from the popup menu.

   The Metadata History page is displayed.

4. When you are done viewing the disposition information, click **OK**.

Viewing Disposition Information for a Retention Category
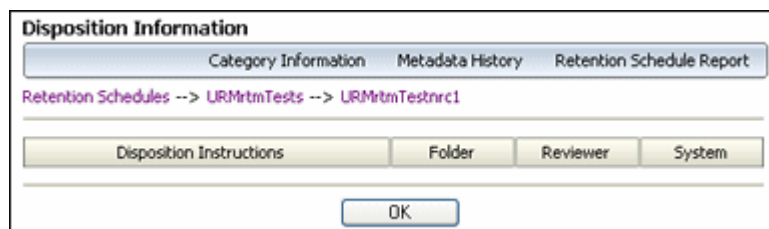
The disposition instructions for a retention category define how retained items in that category are handled and what actions should be taken on them (for example, when and how they should be disposed of).

To view disposition information for a retention category, complete the following steps:

1. Open the **Browse Content** tray and click the **Retention Schedules** link.

    The Exploring Series "Retention Schedules" page is displayed.

2. Navigate to the retention category for which to view disposition information.

3. In the row for the retention category, click the Actions icon, and choose **Disposition Information** from the popup menu.

    The Disposition Information page is displayed.

4. When you are done viewing the disposition information, click **OK**.

Note: The field captions on the disposition information may differ depending on whether your system administrator enabled user-friendly captions.

Viewing the Content Information of a Retained Item

To view the content information of a retained item, complete the following steps:

1. Locate the retained item whose review history you want to view, either by browsing or searching.

2. In the row for the record to view, do either of the following:

    *   Click the Info icon.

    *   Click the Actions icon, and choose **Content Information** from the popup menu.

The Content Information page for the retained item is displayed. For more detailed information about the Content Information page, see Content Information Page for Retained Items on page 4-12.

Generating a Retention Schedule Report

Retention Category Identifier	Retention Category Information
0310-03	**Retention Category Name:** Classification Guides **Disposition Authority** : N1-218-00-4 item 011 **Is Non-Records Category** : No **Permanent** : No **Subject to Review:** Yes **Reviewer** : **Review Period** : 1 Calendar Years **Retention Category Description:** Information relating to the security classification or grading system involving the classification or downgrading of information, including correspondence or memorandums and reports on secruity classification, excluding other files described in this records series. Which are: maintained at offices in charge of issuance.
	Disposition Instructions
	Triggering Event : Declassified date **Retention Period** : 0 **Disposition Action** : Cutoff
	Triggering Event : 1 **Retention Period** : 10 Calendar Years **Disposition Action** : Destroy

You can generate a report for retained items at any time for any portion of the retention schedule to which you have permissions.

To generate a report, complete the following steps:

1. Open the **Browse Content** tray on the left and click the **Retention Schedules** link.

    The Exploring Series "Retention Schedules" page is displayed.

2. Check the box corresponding to the item for which to run a report.

3. Navigate to the series or category to create a report for.

4. In the row for the series or category, click the Actions icon, and choose **Retention Schedule Report** from the popup menu.

A retention schedule report is generated. You can choose to display the report in a new browser window or save it as a PDF file that you can print at a later time.

5. Close the browser window when done.

Note: The report is generated in either PDF or HTML form, depending on how your system administrator configured the system. If the generated file is in PDF format, it cannot be viewed using Adobe Acrobat 5.*x* or earlier. You need at least version 6.0 of the Acrobat software.

THE RETENTION SCHEDULE USER INTERFACE

This section covers the following topics:

❖ Retention Schedule Menu Options (page 4-10)

❖ Content Information Page for Retained Items (page 4-12)

Retention Schedule Menu Options

This section covers the following topics:

❖ Toolbar Menus on page 4-10

❖ Action Icon Menus on page 4-11

Toolbar Menus
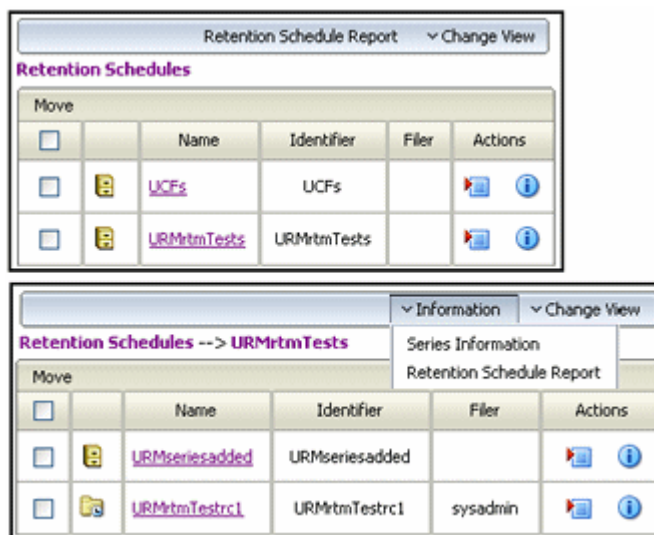
At the retention schedule level in the hierarchy (first insert above), the toolbar menu located in the top right corner of the search results page provides an option that enables you to print a retention schedule report for a selected series listed on the search results page. Or, you can generate a retention schedule using the Action icon Popup menu.

At the series/category level in the hierarchy (second insert above), the toolbar menu located in the top right corner of the search results page provides an Information drop-down menu. You can view the information page for a selected series or generate its retention schedule.

See also:

❖ Viewing the Information Page for a Series on page 4-5

❖ Generating a Retention Schedule Report on page 4-9

❖ Action Icon Menus on page 4-11

Action Icon Menus
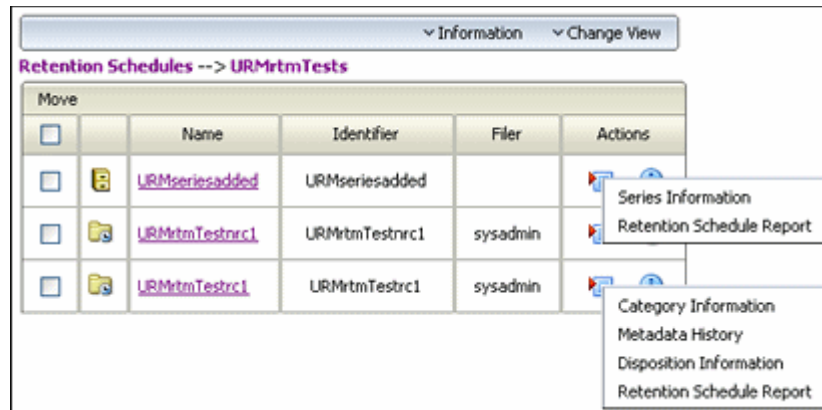
The Actions icon menu for a series enables you to view the information page for the selected series or generate its retention schedule report. The Actions icon menu for a selected category enables you to view its information page, metadata history, or disposition information. You can also generate its retention schedule report.

See also:

❖ Viewing the Information Page for a Series on page 4-5

❖ Viewing the Information Page for a Retention Category on page 4-6

❖ Viewing Metadata History for a Retention Category on page 4-7

❖ Viewing Disposition Information for a Retention Category on page 4-8

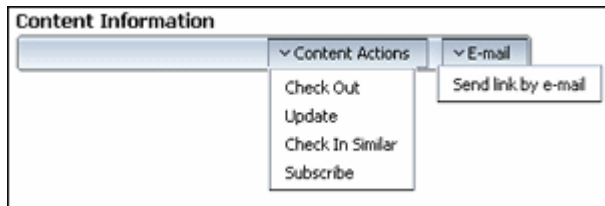# Content Information Page for Retained Items

The page has the following main features:

Toolbar Menus

The **Content Actions** drop-down menu in the top right corner of the information page provides access to a number of tasks that can be performed on the current retained item. The available tasks depend on a number of factors such as the retained item properties, classification level, security restrictions, etc. A typical user will generally have the following options:

❖ **Checking out** a retained item properties (see the *Content Server User Guide*)

❖ **Updating** the retained item (see the *Content Server User Guide*)

❖ **Checking in a similar** retained item (see the *Content Server User Guide*)

❖ **Subscribing** to the current retained item (see the *Content Server User Guide*)

❖ **Sending link by e-mail** (see the *Content Server User Guide*)

Content Information Area

This area provides filing information about the retained item, including content ID, title, filer, and publication date. For further details on the standard content information metadata, refer to the *Content Server User Guide* and online help system.

Correspondence Fields Area

Note: The correspondence fields are only included on the Content Information page if you selected the Retention Manager Email option druing the Adapter installation process. For more information about this option, see Installing the Adapter (page 2-6).

This area provides information about the content item's author along with various related addresses, as well as additional information about the current status of user accesses. The available Show/Hide toggle switch enables you to display or conceal author information.

Links Area

This area provides links to the native and web-viewable retained item, as well as a number of retention management links.

Revision History Area

This area provides release information about the current retained item.

5

CHECKING IN CONTENT FOR RETENTION

OVERVIEW

This section covers the following topics:

Tasks

Interface

CREATING NON-RECORD CONTENT USING THE MAIN MENU

You can create non-record content from the main menu of Content Server, or you can mark existing content within the content server as a record.

This section covers the following topics:

- ❖ Checking In Content Items (page 5-2)

- ❖ Checking In E-Mail for Retention (page 5-3)

- ❖ Checking In an Individual E-Mail as a Retained Item (page 5-3)

- ❖ Checking In Correspondence From a Non-Outlook E-Mail Client (page 5-4)

Checking In Content Items

Use this procedure to check in new content. Content items can be checked into a category.

Tech Tip: Use this method of filing content items when you are filing items to disparate locations and have to navigate to a different location within the retention schedule with each check in.

To check in from the main menu, complete the following steps:

1. Click **New Check In** on the toolbar or under the Content Management tray.

   The applicable checkin page is displayed.

2. Enter optional information pertinent to the content item. See Check In Page Metadata Fields (page 5-5) for information about metadata fields.

3. After you enter all the appropriate metadata values, click **Check In**.

   Upon successful check-in, the check-in confirmation page is displayed.

For more detailed information on checking in content, refer to the online help or the *Content Server User Guide*.

Checking In E-Mail for Retention

This functionality is only available if the applicable option was selected and enabled during the installation process. You can check in e-mail messages as content with the Oracle Outlook Integration for Microsoft Outlook.

You must have the Outlook Integration Suite application installed and configured on your client machine. For assistance with setting up your server, see the online Help for Oracle Outlook Integration.

Important: Checking in batch e-mail removes the mail from your Inbox. Checking in an individual e-mail leaves the mail in your Inbox.

Outlook Integration Toolbar

The Outlook Integration toolbar enables you to configure virtual servers for checking in content with disparate metadata. To display the Outlook toolbar in Microsoft Outlook, click **View—Toolbars—Oracle Outlook Integration**.

Checking In an Individual E-Mail as a Retained Item

Use this procedure to check in an individual e-mail as an individual retained item.

Important: Checking in an individual e-mail leaves the mail in your Inbox. You must manually delete the e-mail to remove it from your mailbox.

To check in an e-mail message as a content item, complete the following steps:

1. Open your Microsoft Outlook e-mail client.

2. In the **Server** list, select the server into which to check in e-mail content.

3. In your Inbox, select the e-mail to check in. The e-mail message becomes highlighted.

4. In the Outlook Integration toolbar, click **Checkin Mail Item**. An Outlook message prompts you to allow access into your e-mail application.

5. Click **Yes**. The Content Check In Form is displayed.

6. Select the **Is Correspondence** check box. The e-mail fields are displayed, some of which are prepopulated for you:

   a. Addressee(s)

   b. Other Addressees(s)

   c. Email Subject

   d. Email To Lists

7. To preview the life cycle of the or retained item before actually checking it into the content server, click **Lifecycle Preview** at the bottom of the content check-in page. This will open a page showing the life cycle that the retained item will go through based on the current selections on the content check-in page.

8. Click **Check In**.

Checking In Correspondence From a Non-Outlook E-Mail Client

Use this procedure to check in correspondence as a retained item if you do not use the Outlook Integration.

To check in e-mail from a client other than the Outlook Integration:

1. Open the e-mail client and save the e-mail messages in a text format or HTML.

2. Click **New Check In**.

   The Content Check In Form is displayed.

3. Check in the content, making sure you select **Is Correspondence** check boxes.

4. Be sure to complete the Correspondence fields, as they are not prepopulated for you if you are not using Outlook Integration.

MAIN MENU CHECK IN PAGE

This section covers the following topics:

❖ Check In Page Metadata Fields (page 5-5)

❖ Vital Review Fields (page 5-7)

❖ Correspondence Fields (page 5-8)

❖ Date Fields (page 5-9)

Check In Page Metadata Fields

The metadata fields that are included in the selected check in form are dependent on the components that are enabled and the profiles that are used. The metadata fields included and described in the following table are representative of those that may be included in the check in form that you select.

Note: To ensure that the Adapter manages content with a disposition plan, note that a Life Cycle field is available on the lower portion of the check-in page. The Life Cycle field enables you to specify disposition instructions. You can only access those life cycles which you have been given permission to work with.

Field	Description
Content ID field*	The unique identifier for the content item. ❖ Duplicate names are not allowed. ❖ Maximum length is 30 characters. ❖ The following are not acceptable: spaces, tabs, linefeeds, carriage returns, and symbols ; ^ ? : @ & + " # % < > * ~ | **Note:** If a content ID is already filled in or if this field is not displayed, the system is set up to automatically generate content IDs.
Type field*	The type (department) of the file. You must select from a list of predefined values. This is required, but is pre-filled.
Title field*	A descriptive name identifying the revision. ❖ Maximum length 80 characters. ❖ Required
Filer field*	The user who created or revised the content item. Depending on how your system is set up, you might be able to select from a list of users. This value can be changed only if you have administrative permission. Required.

Field	Description
Security Group field*	The security group is a set of files with the same access permission.
Primary File field*	The path and file name of the native file being checked in. ❖ Maximum length is 80 characters. ❖ The maximum file extension length (after the period) is eight characters. ❖ Click the Browse button to navigate to and select the file.
Alternate File field	The path and file name of an alternate web-viewable file or a file that can be converted to web-viewable format. ❖ The file extension (after the period) cannot be the same as that of the Primary file (for example, both files cannot end in .*doc*). ❖ Maximum length is 80 characters. ❖ The maximum file extension length (after the period) is eight characters. ❖ Click the Browse button to navigate to and select the file. ❖ Optional.
Revision field*	The revision increments automatically with each check-in of the content item, so generally, you should not change this value.
Comments field	Additional notes about the file. ❖ Maximum length is 255 characters. ❖ Optional.
Vital Review fields	The Vital Review Fields (page 5-7) are displayed.
Correspondence fields	When expanded, the Correspondence Fields (page 5-8) are displayed.

Field	Description
Date fields	The Date Fields (page 5-9) are displayed.
Life Cycle	When checking in items from the main menu, the Life Cycle drop-down list is activated. However, the option list contains only non-record categories when a new content item is checked in. The Life Cycle field enables you to specify disposition instructions to determine how the content will be handled. You can only access those life cycles which you have been given permission to work with.
Profile Trigger	Searches for the specified trigger value that has been configured for a defined profile.
Custom fields	Any custom metadata fields for your system are displayed on this page.
* = Depending on the type of check-in form that you are using, these fields are required.	

Vital Review Fields

All of the check-in forms include the following vital review-related fields:

Field	Description
Subject to Review	Select this check box if the item is subject to review. Selecting this check box enables the Reviewer and Review Period fields. Review items are defined by your organization as needing to be reviewed by a specified person within a specified time frame. Do not select the check box if this is not considered an item which must be reviewed.

Field	Description
Reviewer	Select a reviewer from the list. The reviewer list is a list of people, defined by your administrator, who have access to this review item. The reviewer receives notifications.
Review Period	Select the period from the list.

Correspondence Fields

Note: The correspondence fields are only included on the Check In page if you selected the Retention Manager Email option druing the Adapter installation process. For more information about this option, see Installing the Adapter (page 2-6).

The Correspondence Fields section is only displayed if the applicable option was selected and enabled during the installation process. All of the check-in forms include the following correspondence-related fields:

Field	Description
Is Correspondence	Enabling displays additional metadata fields. Used if a content item is an e-mail being checked in via Outlook Integration.
Author or Originator	Specifies from whom the e-mail was sent. If the Is Correspondence check box is disabled, enter the content author or originator.

Field	Description
Addressee(s)	Specifies to whom the e-mail was sent.
Other Addressee(s)	Specifies any additional people who were copied on the original e-mail.
Email Subject	Displays the subject line of the original e-mail.
Email To Lists	Displays any alias lists used in the original e-mail.

Date Fields

The Date fields section is only displayed if the applicable option was selected and enabled during the installation process. All of the check-in forms include the following date-related fields:

Field	Description
Publication Date	Displays the date an e-mail was initially sent.
Received Date	Displays the date an e-mail was received.
Release Date	The date and time that the revision is available for viewing. This is required but is pre-filled. ❖ Defaults to the date and time the file is checked in. ❖ If another date is entered, the revision remains in DONE status until the specified date. ❖ The date is required; the time is optional.

Field	Description
Expiration Date	The date and time that the revision will no longer be available for viewing in the content server. ❖ Upon expiration, the revision is not deleted. ❖ If a value is entered, the date is required; the time is optional.

SEARCHING FOR RETAINED CONTENT

OVERVIEW

Content Server offers a variety of ways to search for content. See the Content Server online help for information on using the Search tray, the Quick Search field, library query folders, case-sensitivity, using wild cards, and using search operators.

This section covers the following topics:

❖ Main Menu Search Page (page 6-1)

❖ Viewing Search Results (page 6-6)

MAIN MENU SEARCH PAGE

The main menu search page has the following main features:

❖ Search Forms Menu Options (Main Menu) (page 6-2)

❖ Metadata Search Fields (page 6-2)

❖ Vital Review Fields (page 6-4)

❖ Correspondence Fields (page 6-5)

❖ Date Fields (page 6-6)

Search Forms Menu Options (Main Menu)
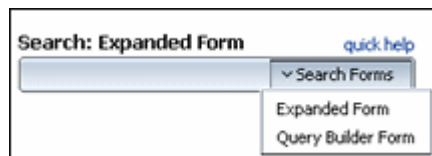
When you install the Adapter, the Search menu options in Content Server are changed. You can use these menu options to quickly narrow down and optimize your searches.

Expanded Search Form

After you have accessed the search page, you can choose to use the expanded version of the form or build a custom search query based on the selected form. By default, several metadata fields on the search form are included in a section that is displayed using the collapsed format. When you select the expanded version of the search form, that section is displayed in the expanded format. For more detailed information and descriptions of each metadata field included on the search form, see Metadata Search Fields (page 6-2), Vital Review Fields (page 6-4), Correspondence Fields (page 6-5), and Date Fields (page 6-6).

Query Builder Form

The Query Builder form is available from the Search Forms drop-down menu on the search page. It enables you to easily build and save complex queries by selecting options from a series of drop-down lists and operator fields. Once a query is built using the Query Builder from, you may edit the query directly, perform the search, or save the query for easy access from your saved queries or through a targeted quick search. For comprehensive information about the Query Builder form, refer to the *Content Server User Guide*. All of the available drop-down lists and operator fields are described in more detail.

Metadata Search Fields

Although the Search tray and Quick Search field offer convenient search options, the search pages for the Records, Non Records, and Standard Search menu options provide the most comprehensive way to search for content. The metadata fields included and described in the following table are representative of those that may be included in the search form that you select. The actual metadata fields that display are dependent on the components that are enabled and the profiles that are used. See your system administrator for more details.

Field	Description
Content ID	Searches for the unique identifier for a content item. ❖ Duplicate names are not allowed. ❖ Maximum length is 30 characters. ❖ The following are not acceptable: spaces, tabs, linefeeds, carriage returns, and the symbols ; ^ ? : @ & + " # % < > * ~ |
Title	Searches the descriptive name entered when a content item was filed. ❖ Maximum length is 80 characters. ❖ Double quotation marks " cannot be used when searching.
Type	Searches for content items belonging to the specified category. It is best to select from a list of predefined values.
Security Group	Searches for content items belonging to the specified security group.
Filer	Searches for content items authored by the specified person. By default, the author is the last person who filed the record.
Release Date	Searches for content items that were released and available for viewing during the specified dates.
Expiration Date	Searches for content items that will expire during the specified date range. Expired content is no longer available for viewing.
Comments	Searches for the specified keywords in the additional notes entered when a content item was checked in. A comments maximum length is 255 characters.
Email ID	Searches for the unique identifier for an email content item.

Field	Description
Profile Trigger	Searches for the specified trigger value that has been configured for a defined profile.
Custom fields	Any custom metadata fields for your system are displayed on this page. These fields vary by organization.
Life Cycle	Content is assigned the disposition instructions associated with the retention category selected in the drop-down list.

Vital Review Fields

The Records, Non Records, and Standard Search forms include the following vital review-related fields:

Field	Description
Review Date	Searches for records that have been reviewed during the specified date range.
Subject to Review	Select an option from the available options list: ❖ **Null (Default)**—Searches for all content items, whether flagged as subject for review or not. ❖ **0**—Searches for content items that have not been flagged as subject for review. ❖ **1**—Searches for content items that have been flagged as subject to review.
Reviewer	Searches for content items flagged as subject to review which are reviewed by the specified person.

Field	Description
Review Period	Searches for content items flagged as subject to review which are reviewed during the specified period.
Review Period Units	Searches for content items flagged as subject to review at the specified period intervals.

Correspondence Fields

Note: The correspondence fields are only included on the Search page if you selected the Retention Manager Email option druing the Adapter installation process. For more information about this option, see Installing the Adapter (page 2-6).

The Records, Non Records, and Standard Search forms include the following correspondence-related fields:

Field	Description
Is Correspondence	Searches for e-mail content checked in via Outlook Integration.
Author or Originator	Searches for e-mail messages sent by specified person.
Addressee(s)	Searches for e-mail messages sent to the specified person.
Other Addressee(s)	Searches for e-mail messages copied to the specified person.

Field	Description
Email Subject	Searches for the specified keywords in the subject lines of e-mail messages.
Email To Lists	Searches for e-mail messages sent to a specified alias list.

Date Fields

The Records, Non Records, and Standard Search forms include the following related-related fields:

Field	Description
Publication Date	Searches for content items that were published on the specified date.
Received Date	Searches for content items that were received on the specified date.

VIEWING SEARCH RESULTS

After selecting your search criteria on the Advanced Search page, or after using any of the other Content Server search options, the results of your search are displayed on a search results page. What information is displayed and how it is formatted can be changed using the Actions choice list on the search results page, or by setting a default search result template option on the User Profile page.

This section covers the following topics:

❖ Search Forms Menu Options (Results Page) (page 6-7)

❖ Action Icon Menu Options (page 6-8)

Search Forms Menu Options (Results Page)
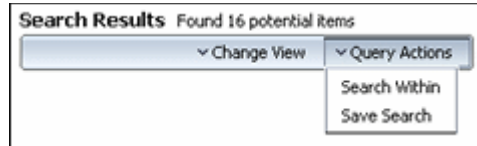
When you install the Adapter, the Query Actions menu options on the Search Results page toolbar enable you to narrow down and/or save your search queries.

The options include:

❖ Search Within Option (page 6-7)

❖ Save Search Option (page 6-8)

Search Within Option
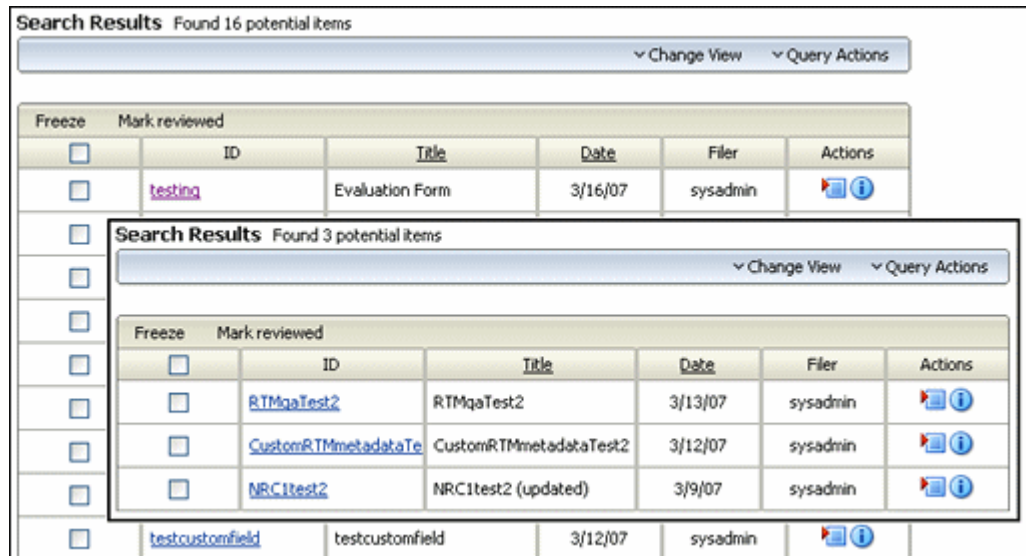
The Search Within option enables you to refine your search results by searching through the initial returned results using additional or more specific metadata values. The insert above illustrates how searching within returned results can optimize the search process. In this case, more specific metadata values reduced the number of items from 16 to three.

Save Search Option

The Save Search option enables you to store a link to the most recent revision of any content item in Content Server. This is done by searching for the item's content ID, then selecting Save Search from the Query Actions drop-down list on the search results page. this saves the search as a link in the My Saved Queries folder in your My Content Server tray. Click the saved search link to always access the most recent revision of a content item. For more information, refer to the *Content Server User Guide*.

Action Icon Menu Options
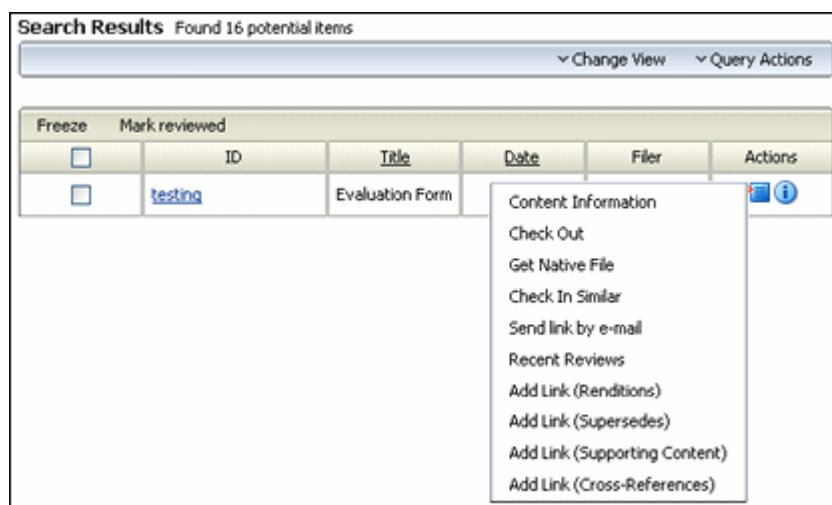
The content item Action menu pulls down from the Actions icon. The menu lists actions that pertain to the associated content item. For example, some of the options in the item action menu for a content item displayed on the search results page include links to check out the item or view the item's content information.

METADATA FIELDS

OVERVIEW

This section covers the following topics:

❖ Created Metadata Fields (page A-1)

❖ Mapped Metadata Fields (page A-3)

❖ Custom Metadata Fields (page A-3)

CREATED METADATA FIELDS

This section lists the metadata fields created by the Adapter during installation. You can view the field definitions using the Configuration Manager utility.

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

Information Field Name	Field Type	Field Caption
EmailSubject	Long Text	Email Subject
EmailTo	Memo	Addressee(s)
EmailToLists	Long Text	Email To Lists
FreezeID	Memo	Folder Reason
FreezeReason	Memo	Freeze Comments
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

MAPPED METADATA FIELDS

The content items in the Adapter server's repository are preserved in place because its Content Server can ensure that the content will remain unalterable during the retention period. Therefore, rather than checking the content items into URM, only the values of specific metadata fields for the retained items are uploaded and stored in URM.

When you install the Adapter and register the external URM source, the retention schedule is automatically downloaded from URM and applied to the Adapter's retention schedule. To accommodate the retention schedule synchronization, specific Adapter metadata fields are automatically mapped to the same metadata fields that are used in URM. By default, the following Adapter metadata fields are mapped to the corresponding fields in URM:

❖ dDocTitle

❖ dDocName

❖ dSecurityGroup

❖ dDocAuthor

❖ dDocAccount

❖ CategoryID (page A-1)

Note: Except for the CategoryID field, the other metadata fields are predefined in Content Server. For more detailed information about them, refer to the *Managing Repository Content* guide.

CUSTOM METADATA FIELDS

This section covers the following topics:

❖ Internal Custom Metadata Fields (page A-3)

❖ Exported Custom Metadata Fields (page A-4)

Internal Custom Metadata Fields

You can customize the Adapter by creating your own custom metadata fields using the Configuration Manager. You can define these fields to be indexed and searchable. You can also choose to display them on the Adapter's Check In page, Search page, and Content Information page.

However, the values of these fields are not exported to URM in addition to the Mapped Metadata Fields (page A-3). These custom fields are only used within the Adapter system. For more detailed information about the Configuration Manager and these types of custom metadata fields, refer to the *Managing Repository Content* guide.

Exported Custom Metadata Fields
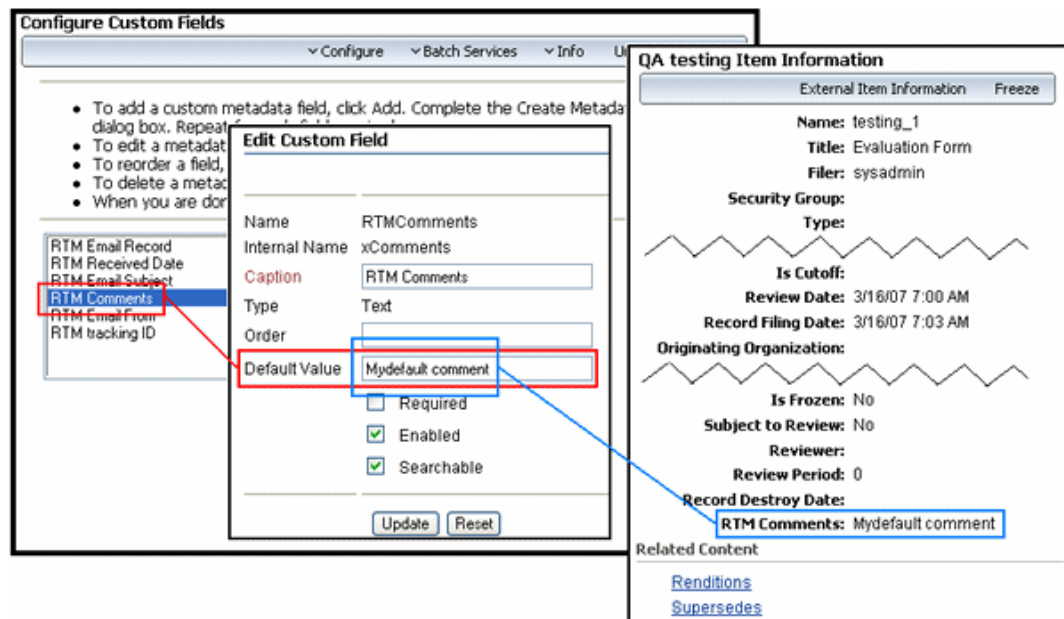
By default, the only information pertaining to the retention schedule that is transferred to URM are the values from the Mapped Metadata Fields (page A-3) that are automatically mapped when you install the Adapter. However, you can define custom metadata fields for the Adapter server's retained content. The default value that you assign to these custom fields is forwarded to URM and included on the Item Information page in URM. This is the only way that supplementary data can be transferred to URM in addition to the values from the mapped metadata fields.

For example, you can use the Configure Custom Fields Screen (page 3-13) to create a custom metadata field for the Adapter such as RTM Comments. Then, using the Add Custom Field Screen (page 3-15), you can assign a default value for this field (such as, Mydefault comment). The populated custom metadata field is transferred to URM and is included on the content item's Item Information page. Thus, in addition to the mapped metadata field values, this custom metadata field value is included in the exported retention schedule information.

> **Important:** When you configure these custom metadata fields, you must specify a default value for the field. If the custom metadata field is not populated, the value will not be transferred to URM with the information from the mapped metadata fields. This method is the only way to include supplementary content item information.

B

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ZLIB LICENSE

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* zlib.h -- interface of the 'zlib' general purpose compression library

  version 1.2.3, July 18th, 2005


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