Oracle® Universal Records Management
Records Manager Corporate Edition User Guide
10*g* Release 3 (10.1.3.3.0)

March 2007

Records Manager Corporate Edition User Guide, 10*g* Release 3 (10.1.3.3.0)

Contributing Authors: Ron van de Crommert, Jean Wilson

Contributors: Lisa Jones, Tok Hui Mackenthun, Victor Owuor

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Chapter

1

INTRODUCTION

OVERVIEW

This section covers the following topics:

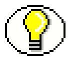
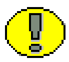
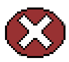
ABOUT THIS GUIDE

This guide provides instructions on using the Records Manager Corporate Edition application. The information contained in this document is subject to change as the product technology evolves and as hardware, operating systems, and third-party software are created and modified.

Note: Records Manager is installed with default tasks assigned to user roles. The information in this document describes common functionality often assigned to user roles when customized by your administrator. Your permissions may vary depending on how your system is configured.

Symbols

The following symbols are used throughout this document:

Symbol	Description
	**Note:** Brings special attention to information.
	**Tech Tip:** Identifies information that can be used to make your tasks easier.
	**Important:** Identifies a required step or required information.
	**Caution:** Identifies information that might cause loss of data or serious system problems.

Conventions

The following conventions are used throughout this document:

- The notation *<Install_Dir>/* is used to refer to the location on your system where a specific instance of Content Server is installed.
- Forward slashes (/) are used to separate parts of an Internet address. For example, http://www.microsoft.com/windows2000/. A forward slash might or might not appear at the end of an Internet address. Forward slashes (/) are also used to separate the directory levels in a path name whether on a UNIX or a Windows system. A forward slash always appears after the end of a directory name.
- Paths to access operating system screens use the following formatting structure:

  Start—Settings—Control Panel
- Required user input is distinguished using the following font formatting:

  `xyz_name`

Guide Audience

This guide provides instructions on using the Records Manager Corporate Edition application. It is intended mainly for those who need to check in and maintain content items managed by Records Manager Corporate Edition (typically those with the predefined ‘rma’ role). For information about tasks restricted to administrators and users with increased privileges, see the *Records Manager Corporate Edition System Setup Guide*.

WHAT'S NEW

Several interface changes have been made from Version 7.1.4:

❖ Retention tasks to be processed are now available on pull-down menus instead of from the Trays menu.

❖ Advanced screening is no longer available. That functionality has been merged into the regular screening functionality.

❖ Dormant global triggers as a trigger type are no longer selectable as an option. You can create dormant global triggers by simply not adding an activation date when you create the trigger.

❖ The Configure Retention Components page is no longer used to configure aspects of the retention schedule (triggers, dispositions, and so on). All functionality of that type is now available by using pull-down menus which are available throughout the product.

❖ You can now edit pre-defined link (related content) types. By default the main links with new content item revisions is checked. This can be changed so linking is not revision independent.

DOCUMENTATION AND HELP

This section covers the following topics:

❖ Documentation (page 1-3)

❖ Tooltips (page 1-4)

❖ Quick Help (page 1-5)

❖ Help Menu (page 1-5)

Documentation

The following Records Manager Corporate Edition documentation is available:

❖ *Records Manager Corporate Edition Installation Guide*
This document provides information about installing the Records Manager Corporate Edition software on the content server. It is provided as a PDF file on the Records Manager Corporate Edition software distribution media.

- *Records Manager Corporate Edition System Setup Guide*
  This document provides information about setting up and administering the Records Manager Corporate Edition application on the content server. It is provided as a PDF file and HTML help system, both of which can be accessed from the Records Manager Corporate Edition user interface. The PDF file is also available on the Records Manager Corporate Edition software distribution media.

- *Records Manager Corporate Edition System Maintenance Guide*
  This document provides information about administering the Records Manager Corporate Edition application on the content server. It is provided as a PDF file and HTML help system, both of which can be accessed from the Records Manager Corporate Edition user interface. The PDF file is also available on the Records Manager Corporate Edition software distribution media.

- *Records Manager Corporate Edition User Guide* (this guide)
  This document provides information about using the Records Manager Corporate Edition application on the content server. It is provided as a PDF file and HTML help system, both of which can be accessed from the Records Manager Corporate Edition user interface. The PDF file is also available on the Records Manager Corporate Edition software distribution media.

In addition to these guides, you can also access information about the product with context-sensitive:

- Tooltips (page 1-4)
- Quick Help (page 1-5)
- Help Menu (page 1-5)

Tooltips

If you hover the mouse cursor over a field label in your web browser, you can get context-sensitive information on the field label. A question mark is displayed, and then the tooltip appears.

Figure 1-1 Field label tooltip

If you are using Netscape, Mozilla, or Firefox as your web browser, you can view tooltips for items in options lists as well, provided the list items are not custom entries.

Quick Help

Click the **Quick Help** button where available on pages and screens to view context-sensitive help for that page or screen.

Help Menu

You can click the main menu Help link to open the online HTML help system for Content Server, which includes the Records Manager Corporate Edition help files. If you are logged in with user privileges, you will only see the end-user help system. If you are logged in as an administrator, you will see the full administrator help system (including the user documentation).

Chapter

2

Introduction to Retention Management

Overview

This section covers the following topics:

Management of Retained Items

Records Manager Corporate Edition effectively manages content items on a retention schedule.

The focus of retention management of content items tends to be the ***scheduled elimination of content*** in which the costs of retaining content outweighs the value of keeping it.

This section covers the following topics:

Needs for Retention Management

There are various reasons why organizations may need retention management:

- ❖ Regulatory Needs (page 2-2)
- ❖ Litigation Needs (page 2-2)
- ❖ Business Needs (page 2-3)

Regulatory Needs

Many organizations are subject to regulations that require the retention of information for a specified period of time:

- ❖ Sarbanes Oxley:
  - Applies to all publicly traded corporations or companies that may become public
  - Audit-related working papers, communications, and correspondence must be retained for five years after the audit
- ❖ Pharmaceutical/healthcare industry—HIPAA, FDA regulations
- ❖ Financial services—SEC Rule 17a
- ❖ Telecommunications industry—47 CFR 42, etc.

Retention management enables organizations to comply with the retention requirements of these regulations.

Litigation Needs

There may be litigation-related needs for effective and efficient retention management:

- ❖ Policy-based retention of information:
  - Retain information that you may need for litigation (for example, a contract and any communication relating to it).
  - Centralized searching and retrieval of that information
- ❖ Systematic disposition of eligible content:
  - Less material to search through during discovery
  - Less material to give to opposing counsel
- ❖ Suspend/freeze disposition of content items relating to pending litigation:
  - Avoid appearance of cover-up and possible liability when content items relating to pending litigation are destroyed.

Business Needs

There may be business-related needs for effective and efficient retention management:

- “Islands of content” problem. Content items that are:
  - Generated across the organization
  - Created in a variety of forms—for example, e-mail, office application documents, sheets of paper, CDs, DVDs, microfiche, recordings of corporate events and conference calls, etc.
  - Stored in an ad-hoc fashion in a variety of locations—for example, employee desks, employee computers, corporate servers, central file storage, offsite storage.
- There is a need to:
  - Provide a uniform infrastructure for retrieving and sharing the content across the organization.
  - Ensure that content items are retained over the period of time that they are useful to the business.

Records Manager Corporate Edition manages all content items, regardless of their source, in a single, consistent, manageable infrastructure.

What Do I Retain?

Content items for retention are any form of information, both physical and electronic that is **important** enough for an organization that it must be **retained** for a specific period and may be **disposed** of when it is no longer needed. However, it can be revisioned, retained (but not necessarily with a minimum retention period), and can be on a disposition schedule. Your organization may choose to manage content with Records Manager Corporate Edition to eliminate outdated and misleading information and track documents related to legal proceedings.

See the following sections for more information:

- Importance of Content (page 2-4)
- Retention (page 2-5)
- Disposal (page 2-5)

Content Retention Qualities

Content retention qualities include:

- **Purpose:** Content items for retention are generally live, active documents that can be revisioned.
- **Benefits:** Benefits of retaining content items is reduced risk and cost of discovery for litigation, reduced costs associated with storage, elimination of clutter to promote user efficiency, and dissemination of only current information to improve communication.
- **Ability to Revision:** Content items can be checked out, modified, and checked back in to create multiple revisions.
- **Disposition**: Content items generally have disposition schedules (life cycles) assigned by item upon check in.

Note: Records Manager Corporate Edition supports disposition schedules for content items, which means it can manage retention and disposal of content. This enables you to schedule lifecycles for content to eliminate outdated or superseded information, manage storage resources, or handle legal procedures.

- **Functionality Available to Content outside of Retention Schedule**:
  - Freeze
  - Link (available if the Related Content component is installed and enabled)
  - Subject to Review

Importance of Content

Retained information can be **important** for a variety of reasons:

- The information may be required for the day-to-day operations of the organization and needs to be kept for historical, tracking, or audit purposes (for example, receipts, order histories, completed forms, personnel files, corporate announcements).
- The information may be necessary to the success or survival of the organization (for example, software source code, contracts, financial data).
- There may be internal policies or external regulations that require the information to be retained (for example, transaction documents, financial statements, lease agreements).
- The data may be important in preparation for possible litigation or discovery.

Retention

The information may need to be **retained** for different periods of time, depending on the type of content, its use within the organization, and the need to comply with external laws or regulations.

- The retention may be time-based (for example, five years from the filing date).
- The retention period may be event-based (for example, an employee termination).
- The retention period may be both time-based and event-based (for example, two years after employee termination).
- The retention period may be based on usage (if you have Stellent Content Tracker).
- The retention may be based on revision.

Disposal

After a retention period, content items are disposed of by authorized people according to the requirements of the organization.

About Records Manager Corporate Edition

Records Manager Corporate Edition enables you to manage content items—regardless of their source or format—in a single, consistent, manageable infrastructure. Content items managed by Records Manager Corporate Edition are assigned retention schedules and disposition rules. This enables you to schedule lifecycles for content to eliminate outdated or superseded information, manage storage resources, or comply with legal audit holds.

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

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

Basic Retention Management Concepts

The following concepts are important in the context of Records Manager Corporate Edition:

- Retention Schedules (page 2-6)
- Series (page 2-6)
- Retention Category (page 2-6)
- Disposition (page 2-7)
- Disposition Instruction (page 2-7)
- Period (page 2-7)
- Trigger (page 2-7)
- Content Item Link (page 2-7)
- Freeze (page 2-7)

Retention Schedules

The retention schedule is an organized hierarchy of series, and categories, which enables you to cluster content into similar groups, each with its own retention and disposition characteristics.

Series

A series is an 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. 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. Retention categories cannot be nested, which means a retention category cannot contain other retention categories.

Disposition

Disposition is the collective set of actions taken on content items, usually for items that are no longer required. Disposition actions include wait times and activities such as notify authors, delete previous revisions, and delete all revisions.

Disposition Instruction

A disposition instruction is created within a retention category, and typically consists of one or more disposition rules, which define how content items are handled and what actions should be taken on them (for example, when and how they should be disposed of).

Period

A period is the segment of time that must pass before a review or disposition action can be performed. Records Manager Corporate Edition comes with a number of built-in periods (for example, “one year”), but you can create custom periods to meet your unique business needs.

Trigger

A trigger is an event that needs to take place before a disposition instruction is processed. Triggers are associated with disposition rules for retention categories. Examples of triggering events include changes in status and completed processing of a preceding disposition action.

Content Item Link

A content item link is a defined relationship between content items. This may be useful when items are related and need to be processed together. Links are available for content items that are stored both in and out of the retention schedule. Linking is available if the Related Content component has been installed and enabled.

Freeze

Freezing a content item inhibits disposition processing for that item. Frozen content items cannot be altered in any way nor can they be deleted. This may be necessary in order to comply with legal or audit requirements (for example, as a result of litigation). Freezing is available for content items that are stored both in and out of the retention schedule.

Records Manager Corporate Edition and Content Server

Records Manager Corporate Edition supports the following Content Server layouts and search templates (which users can set in their user profile):

- Supported layouts:
  - Trays
  - Top Menus
- Supported search templates:
  - Headline View
  - Thumbnail View
  - My Headline View

Note: The Records Manager Corporate Edition application does not support the Classic layout or the Classic View search template. This guide assumes you are using the Trays layout.

Basic Processes

The following steps outline the basic workflow of content within Records Manager Corporate Edition

1. The retention schedule and any required components (such as triggers, periods, and custom metadata fields) are created.
2. Content items are filed into the retention schedule by users. The filed items assume the disposition schedules of their assigned category.
3. Disposition rules are processed by Records Manager Corporate Edition in accordance with the defined disposition schedules, which usually have a retention period. The processing is activated by either a system-derived trigger or custom trigger. The trigger could affect one or more content items simultaneously.
4. Whenever a disposition event is due for action as activated by a trigger, an e-mail notification is sent to the person responsible for processing the events. The same is true for review. The pending events and reviews are displayed in the pages accessed from the My Retention Assignments links within the user interface.

5. The administrator or privileged user performs the review process. This is a manual process.
6. The administrator processes the disposition actions in the pending events pages. This is a manual process.

Many disposition schedules are **time-based** according to a predictable schedule. The system keeps track of when the affected content items are due for action. Notification e-mail is sent, and the content items are routed to the My Retention Assignments area of Records Manager Corporate Edition.

The person responsible for the pending events and reviews then processes the content items accordingly. The particular disposition actions due are indicated for the content items. Available menu actions are context-sensitive according to the state of the item.

In contrast, **time-event** and **event-based** dispositions must be triggered with a non-system-derived trigger; that is, a trigger that was defined for a particular scenario. When a pending legal case starts litigation, the administrator must enable the custom trigger and set its activation date since the start date information is external to the Records Manager Corporate Edition logic. Custom triggers enable you to define event and time-event based disposition actions based on the occurrence of a particular event.

Chapter

3

CREATING CONTENT FOR RETENTION

OVERVIEW

This section describes these topics:

- Checking In From Content Server's Main Menu (page 3-1)
- Checking In E-Mail for Retention (page 3-8)

CHECKING IN FROM CONTENT SERVER'S MAIN MENU

This section describes these topics:

- New Check In Menu Options (page 3-2)
- Check In Page Metadata Fields (page 3-2)
- Subject to Review Fields (page 3-4)
- Correspondence Fields (page 3-5)
- Date Fields (page 3-6)
- Checking In Content (from Main Menu) (page 3-7)

New Check In Menu Options

If profiles have been created for you by your system administrator, those profiles appear on the New Check In menu. You can use those profiles to facilitate checking in new content.

Important: The fields displayed on the checkin pages are dependent on the profiles being used for the checkin. See your System Administrator for details about what triggers are used for your profiles and what fields are to be expected on the checkin pages.

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. An asterisk in the following list indicates that these fields are often required.

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

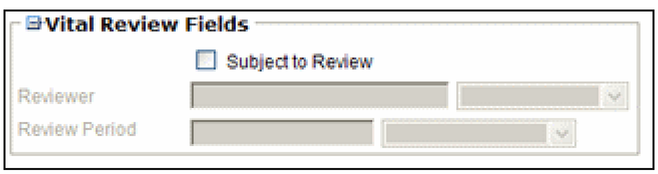
Field	Description
Filer field*	The user who created or revised the content item. Depending on how your system is set up, you might be able to select from a list of users. This value can be changed only if you have administrative permission. Required.
Security Group field*	The security group is a set of files with the same access permission. ❖ Required.
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. This is required.

Field	Description
Comments field	Additional notes about the file. ❖ Maximum length is 255 characters. ❖ Optional.
Subject to Review section	When expanded, the Subject to Review Fields (page 3-4) are displayed.
Correspondence Fields section	When expanded, the Correspondence Fields (page 3-5) are displayed.
Date fields section	The Date Fields (page 3-6) are displayed.
Custom fields	Any custom metadata fields for your system are displayed on this page.

Subject to Review Fields

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

Figure 3-2 Vital Review Fields section



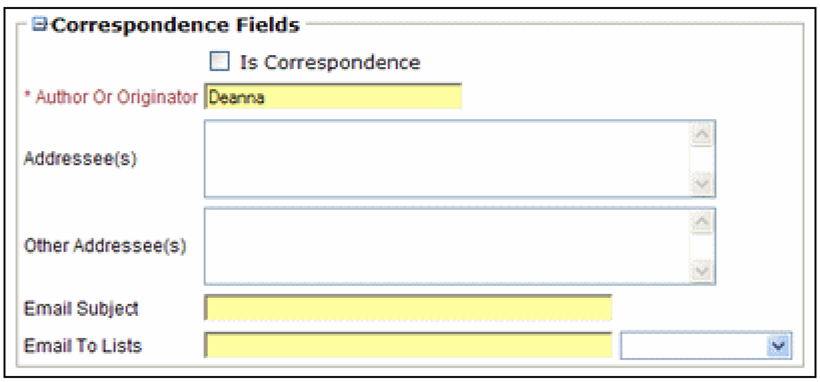
Field	Description
Subject to Review	Select this check box if the item is subject to review. Selecting this check box enables the Reviewer and Review Period fields. Review items are defined by your organization as needing to be reviewed by a specified person within a specified time frame. Do not select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

All check-in forms can include the following correspondence-related fields:

Figure 3-3 Correspondence Fields section



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.
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.

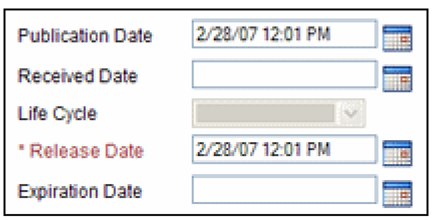
Field	Description
Email Subject	Displays the subject line of the original e-mail.
Email To Lists	Displays any alias lists used in the original e-mail.

Date Fields

Note: To ensure that Records Manager Corporate Edition manages content with a disposition plan, note that a Life Cycle field is available in this 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. See the *Records Manager Corporate Edition System Setup Guide* for more information.

All check-in forms can include the following date-related fields:

Figure 3-4 Date fields section



Field	Description
Publication Date	Displays the date an e-mail was initially sent.
Received Date	Displays the date an e-mail was received.
Life Cycle	When checking in items from the main menu, the Life Cycle drop-down list is activated. 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. See the *Records Manager Corporate Edition System Setup Guide* for more information.

Field	Description
Release Date	The date and time that the revision is available for viewing. ❖ 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. This is required but is pre-filled.
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.

Checking In Content (from Main Menu)

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

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

1. Click **New Check In** on the toolbar. If profiles have been created, there may be several different checkin options available.

   The applicable checkin page is displayed.

2. Enter optional information pertinent to the content item. See Check In Page Metadata Fields (page 3-2) 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

You can check in e-mail messages as content with the Oracle Outlook Integration for Microsoft Outlook.

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

Outlook Integration Toolbar

The Outlook Integration toolbar enables you to configure virtual servers for checking in content with disparate metadata. You can also configure your check in folders for each server.

To display the Outlook toolbar in Microsoft Outlook, click **View—Toolbars—Oracle Outlook Integration**.

Note: You can also use Checking In Correspondence From a Non-Outlook E-Mail Client (page 3-9).

This section describes these topics:

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.

Chapter 4

SEARCHING FOR RETAINED CONTENT

OVERVIEW

There are 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 chapter covers the following topics:

SEARCHING FROM CONTENT SERVER'S MAIN MENU

This section describes these topics:

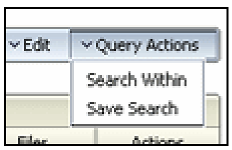
Search Menu Options

When you install the product, the Search menu for Content Server is changed due to default profile pages.

The additional menu option can be used to to help you quickly narrow your searches. Note that the Screening option on the Search menu is dependent on security rights assigned to the user. In addition, if profiles have been created for use, those profile names appear on these menus.

When viewing search results, a query menu is added to the search results page.

Figure 4-5 Query Menu on Search Results



The options on this menu let you narrow your search by selecting new fields from those already selected, or to save the search under a file name for use later. See the *Content Server User Guide* for more details about searching and saving query results.

Expanded Search Form

After you have selected the type of search form to use, you can choose to use the expanded version of that form or build a custom search query based on the selected form. By default, several sections of each search form are displayed using the collapsed format (for example, Correspondence Fields). When you select the expanded version of a search form, all of the sections on the form are displayed in the expanded format. For more detailed information and descriptions of each metadata field included on the search forms, see Search Page Metadata Fields (page 4-3).

Query Builder Form

The Query Builder form is available from the Search Forms drop-down menu at the top of the page on any of the search pages. 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.

When you install Records Manager Corporate Edition, the Query Builder form displays the Include Child Records Folders check box. If you select this option, the search function returns any matching results within child records folders. For comprehensive information about the Query Builder form, see the *Content Server User Guide*.

Search Page Metadata Fields

Although the Search tray and Quick Search field offer convenient search options, the main search page provides 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. In addition, custom fields added by your system administrator may appear. These fields vary by organization. See your system administrator for more details.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Content ID</td><td>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 ; ^ ? : @ & + " # % < > * ~ |</td></tr>
<tr><td>Title</td><td>Searches the descriptive name entered when a content item was filed.
❖ Maximum length is 80 characters.
❖ Double quotation marks " cannot be used when searching.</td></tr>
<tr><td>Type</td><td>Searches for content items belonging to the specified category. It is best to select from a list of predefined values.</td></tr>
<tr><td>Security Group</td><td>Searches for content items belonging to the specified security group.</td></tr>
</table>

Field	Description
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.
Profile Trigger	Searches for the specified trigger value that has been configured for a defined profile.
Life Cycle	Content is assigned the disposition instructions associated with the retention category selected in the drop-down list.

Freeze Fields

The search forms can include the following freeze-related fields:

Field	Description
Is Frozen	Select an option from the available options list: ❖ **Null (Default)—**Searches for all records, whether frozen or not. ❖ **0—**Searches for records that have not been frozen. ❖ **1—**Searches for records that have been frozen.

Field	Description
Freeze Name	Searches by a freeze name.
Freeze Reasons	Searches the Freeze Reason metadata for keywords entered here. This can apply to record and non-record content

Subject to Review Fields

The following review-related fields can be included:

Field	Description
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.
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.
Review Date	Searches for records that have been reviewed during the specified date range.

Correspondence Fields

The search forms can 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.
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

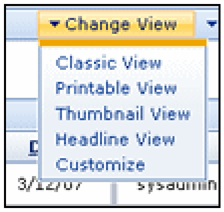
The Records, Non Records, and Standard Search forms include the following date-related fields:

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

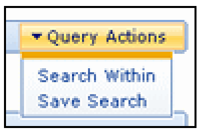
After selecting your search criteria, the results of your search are displayed on a search results page. What information is displayed and how it is formatted can be changed using the **Change View** menu or the **Query Actions** menu at the top of the search result page.

Figure 4-6 Change View menu



Use the options on this menu to change the way search results are displayed or to create a customized view. See the Content Server User's Guide for details about customization.

Figure 4-7 Query Actions menu



Use the options on this menu to refine your search by searching within the search results, or to save the search.

Appendix

A

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