Oracle® Universal Records Management

Oracle Universal Records Manager Adapter for Documentum Administration Guide

December 2009

1 Administration Overview

1.1 Overview

This section contains the following topics:

- About This Guide

1.2 About the guide

This guide provides instructions on how to use the Documentum Adapter on a computer running either Microsoft Windows or Linux.

Note: 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.

1.2.1 Audience

This guide is intended for those users who will be running the adapter to crawl documents and apply dispositions to them. This gives step-by-step procedures on how to run the adapter.

1.2.2 Conventions

The following conventions are used throughout this guide:

- Forward slashes (/) are used to separate parts of an Internet address. For example, http://www.oracle.com/en/index.htm. A forward slash might or might not appear at the end of an Internet address.
- Backward slashes (\) are used to separate the levels in a path to a Windows server, directory, or file. For example, C:\stellent\idcm1\. A backward slash will always appear after the end of a Windows server, directory, or file path.
- Forward slashes (/) are also used to separate the levels in a path to a UNIX server, directory, or file. For example, /usr/stellent/idcm1.
- File names and file paths within text are indicated by the following convention: *<filename>* file in the *<path_to_directory>* directory.
- Notes, technical tips, important notices, and cautions use these conventions.

2 Functional Overview

The whole functionality of the Adapter is segregated into the following modules:

- Adapter Initiation and Configuration
- Adapter Behavior

2.1 Adapter Initiation and Configuration – administration. jar

The Adapter provides a class, which acts as the entry point to start execution. In the Adapter initiation, Adapter and Adapter Engine are instantiated and a listener is added to the Adapter Engine for listening to the Events. Finally, the Adapter is activated to allow the communication between URM and Documentum repository. The adapter configuration involves details about adapter implementations which enable it to customize its internal behavior to appropriately host the adapter. It describes the capabilities of the adapter as well as how each capability setting alters the framework's internal behavior.

2.2 Adapter Behavior – DctmAdapter.jar

The DctmAdpater.jar file contains the Documentum Adapter functionality. It provides various classes (which extend from the generic adapter implementations) to implement the various tasks like Document declaration, retention and record management. These tasks are carried out at the URM end and this Documentum Adapter serves as the bridge between the URM and the Documentum conveying to Documentum Content Server the actions performed on the documents at the URM end.
The Documentum Adapter will be able to perform the following functions:

2.2.1 Self description. The adapter supplies several classes to be used by Administration Utility. These classes define what metadata (names, data types, etc.) the adapter can supply to the Oracle Universal Records Management application, define windows controls for use in search creation, and define fields that can be searched.

2.2.2 Document declaration. The Adapter supplies functionality to evaluate searching expressions, and use the results to get a list of documents and their metadata for submittal to the Oracle Universal Records Management application.

2.2.3 Retention management on selected files. Retention management is performed by collecting metadata belonging to the selected file and sending it to the Oracle Universal Records Management application. When the retention period has expired, the adapter will perform the appropriate disposition action (archive or delete) against the file.

2.2.4 Record management on selected files. Record management ensures that a file cannot be modified or deleted from the documentum repository if it is checked into the URM as a record. All such records then become uneditable from the Documentum end.

2.2.5 Document freezing. A litigation freeze issued from the Oracle Universal Records Management application causes the adapter to freeze the document. This document then becomes uneditable.

2.2.6 Document Disposition. Following are the dispositions supported by the documentum adapter that can be issued by the Oracle Universal Records Management application:

- **Archiving -** Following an archive disposition issued by the Oracle Universal Records Management application, the adapter creates a zip of the original content.
- **Destroy -** This completely destroys the document from the repository.
- **DeleteRevision -** This deletes the selected version of the document.
- **DeleteAllRevisions -** This deletes all the versions of the particular document.

2.2.7 Record Migration. This enhancement involves providing a configurable option, This would allow to migrate the content of record/frozen documents to URM repository. The actual document in Documentum repository would be replaced by a stub (i.e. an HTML file with the reference link) rather than using the TBO module in Documentum to manage record/frozen functionality.

2.2.8 Full Text Search. This enhancement involves providing the full-text search capability of Documentum repository. It is applicable for both kinds of search - declaration search as well as federated search.

2.2.9 Federated Search. Federated Search is used for items that are located on Documentum repository. This is a search of all possible content using adapters to schedule the search. Searching for content in Remote Repository is not in real time, and is dependent on adapters to complete the search. This will be a separate call to the adapter API with search criteria that will need to find the results matching those criteria for the source in question and return all metadata (not just mapped) as well as the document data itself.

3 Detailed description

This section describes the procedure for configuring the administration.jar and running the DctmAdapter.jar file.

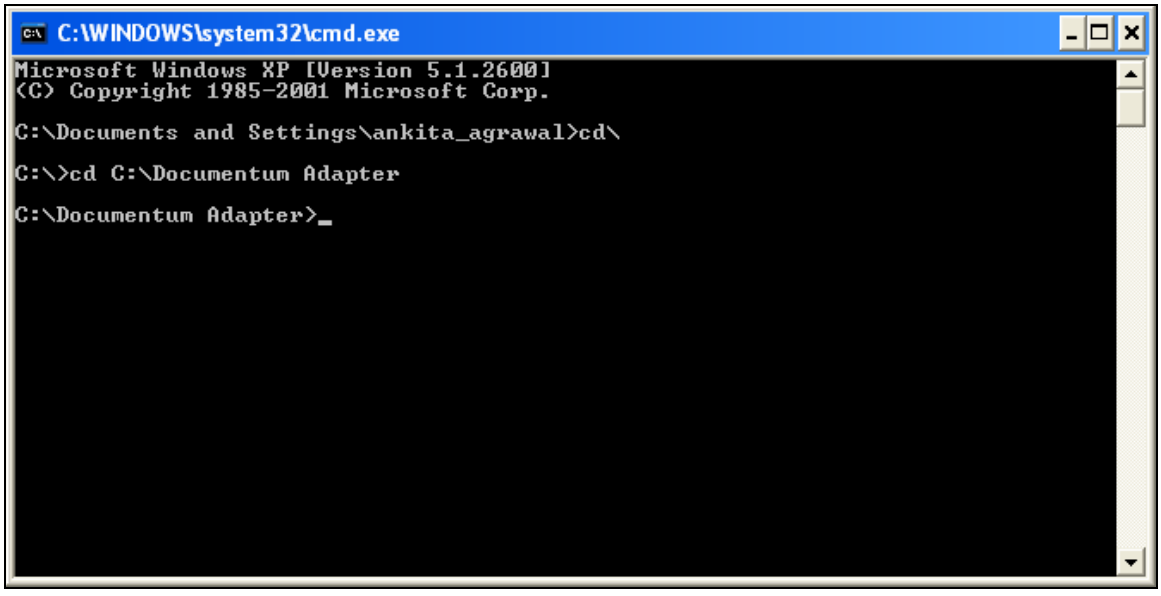
3.1 Configuring the Adapter through Administration screens

Before starting the Documentum Adapter, it needs to be configured through the administration screens. The steps to execute administration.jar file are as follows:

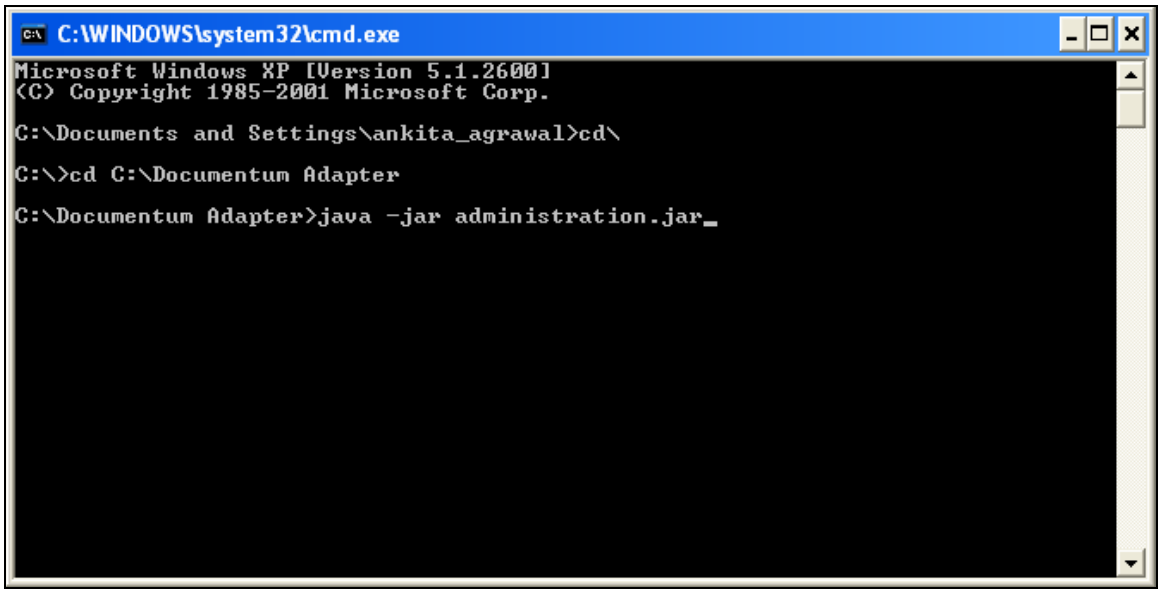
1. Open the command prompt either by

   Start →run→ type “cmd” in run window.
   Or by
   Start→programs→accessories→command prompt.

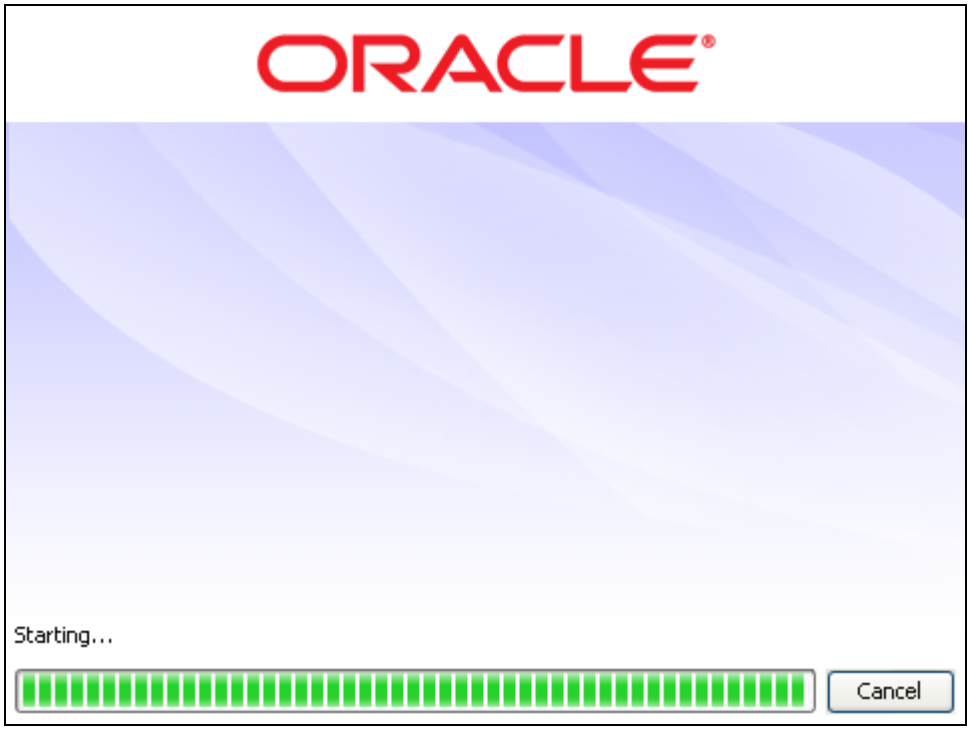
2. Change the path in the command prompt to the directory where administration.jar file is located. (e.g.: path of administration.jar file is C:\Documentum Adapter)



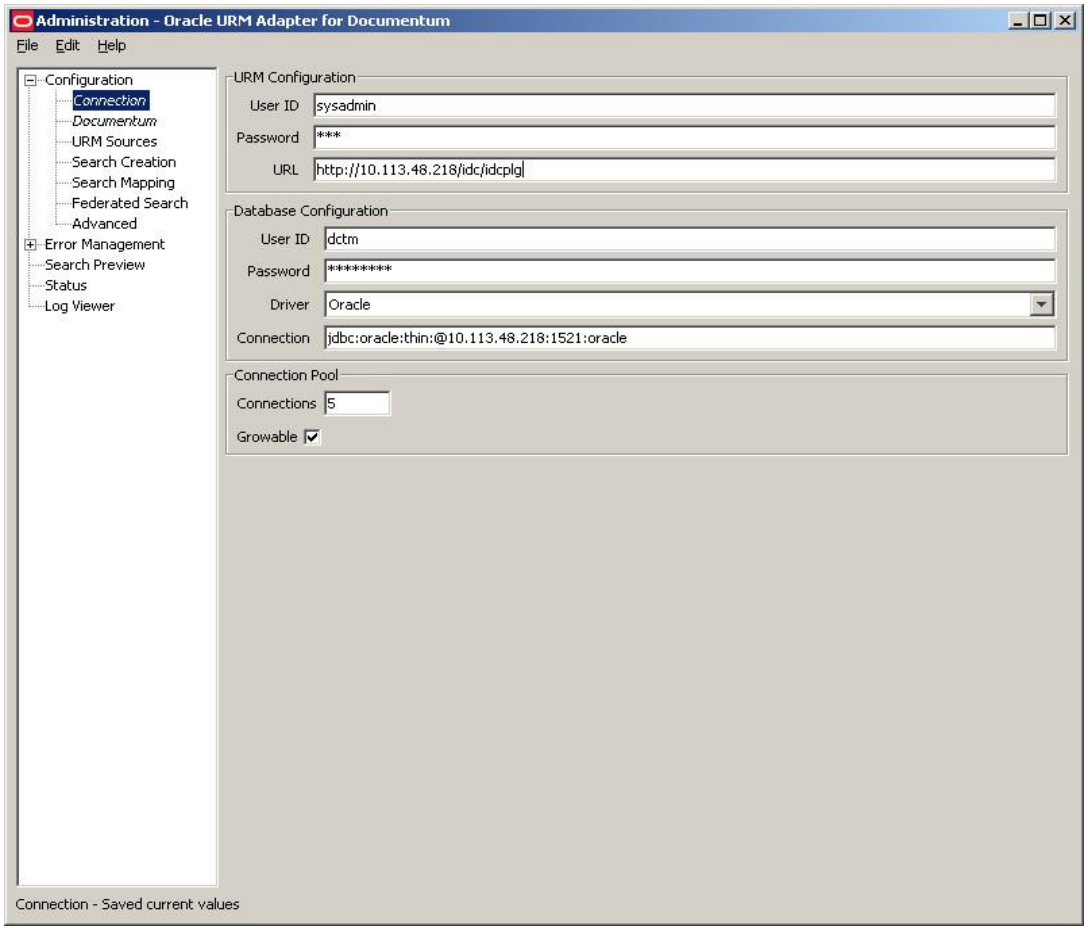
3. Execute the command java –jar administration.jar on command prompt to run the jar file.



4. Subsequently the executable administration. jar file gets started as shown below.

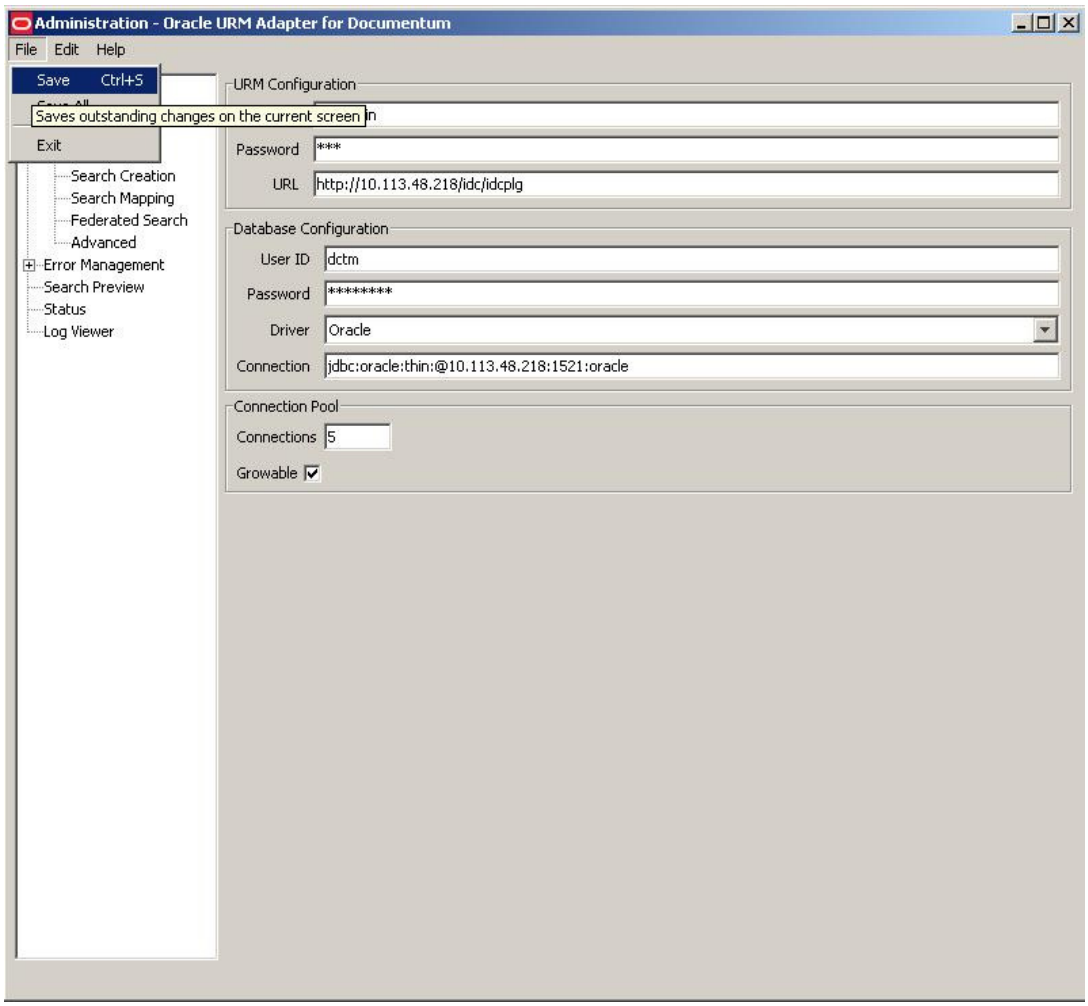


5. A new window Administration-Oracle URM Adapter for Documentum will open. Here the URM and its database configuration details are provided. These details are saved by the Adapter for further reference.

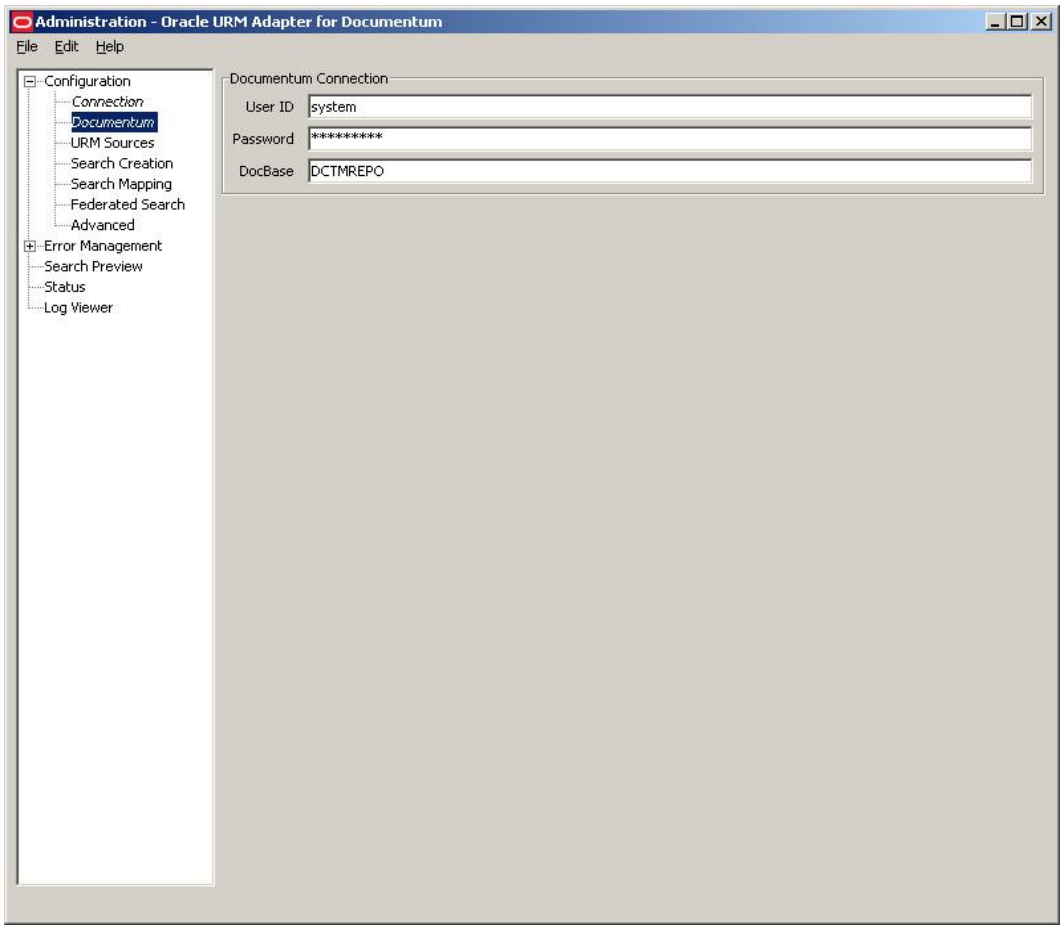


6. Fill the following details in Connection screen and click “save” option of file menu.

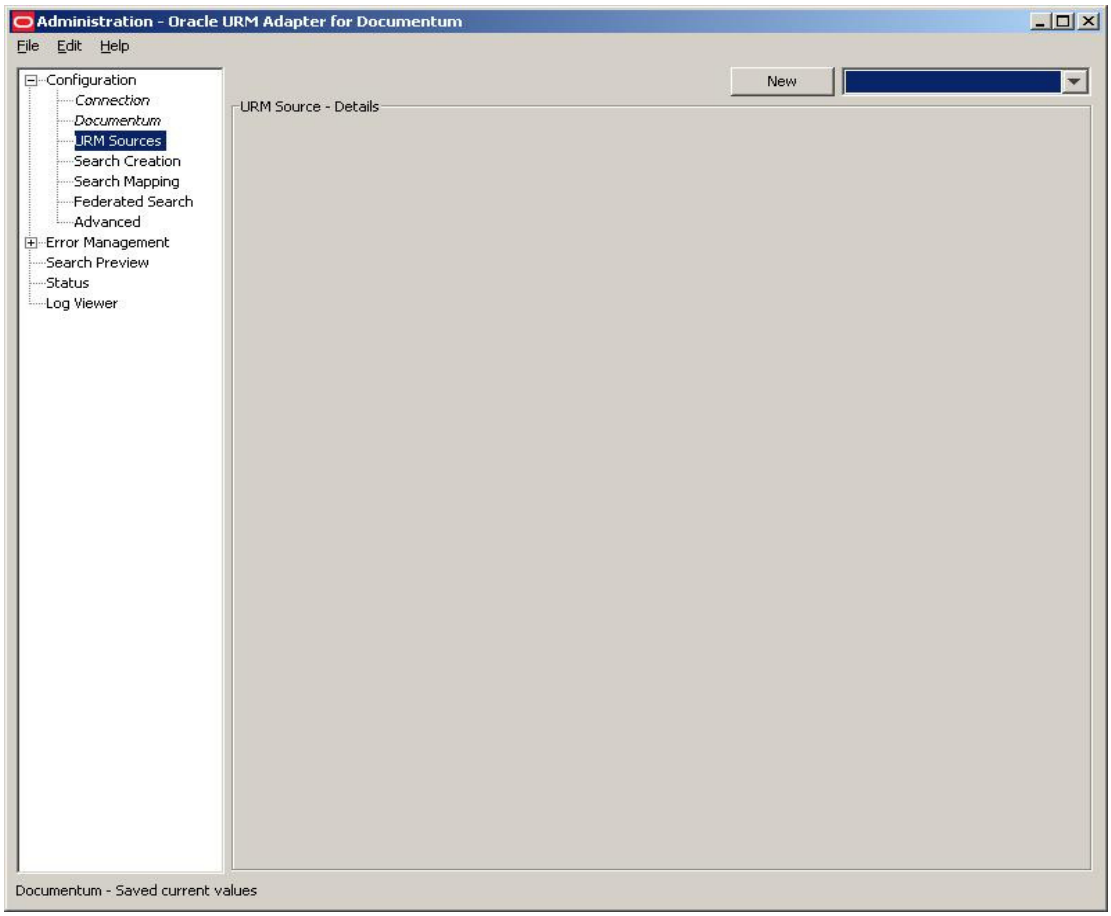
- URM Configuration
  - a) Userid
  - b) Password
  - c) URL (e.g.: http:// <hostname>/idc/idcplg)
- Database Configuration
  - a) Userid
  - b) Password
  - c) Driver
  - d) Connection
- Connection Pool
  - a) Connection
- Growable - This needs to be checked.


Administration - Oracle URM Adapter for Documentum
File
Edit
Help
Save Ctrl+S
Saves outstanding changes on the current screen
Exit
Search Creation
Search Mapping
Federated Search
Advanced
Error Management
Search Preview
Status
Log Viewer
URM Configuration
Password
***
URL
http://10.113.48.218/idc/idcplg
Database Configuration
User ID
dctm
Password
****
Driver
Oracle
Connection
jdbc:oracle:thin:@10.113.48.218:1521:oracle
Connection Pool
Connections
5
Growable

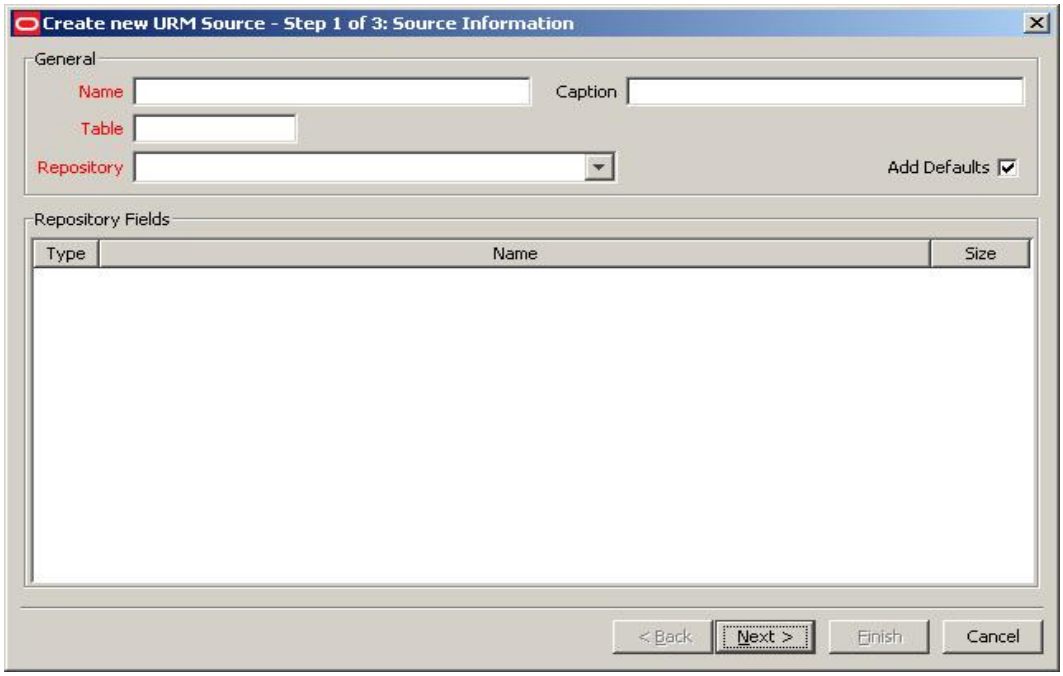
7. The next screen shows the Documentum Database connection details. Fill in the Documentum User ID, Documentum Password and DocBase and click “save” option of file menu.

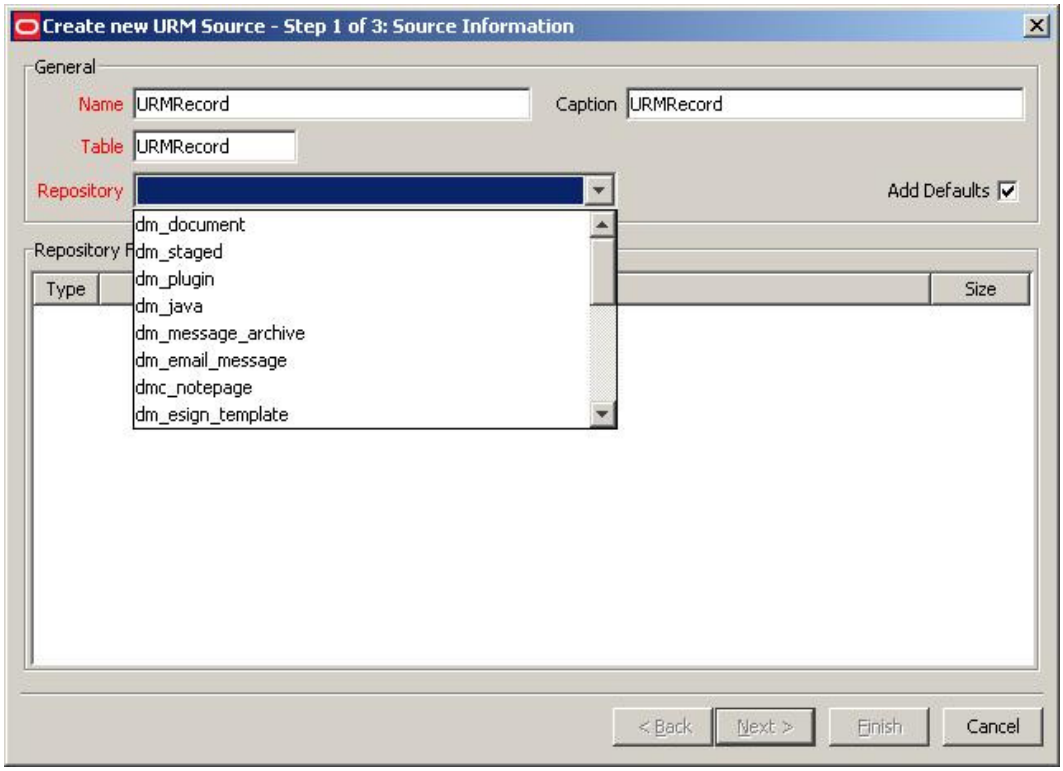


8. Create a new Source by clicking the URM Sources. A New button and a new screen will appear. The sources made here are also created and shown in the “External Content” section in URM.

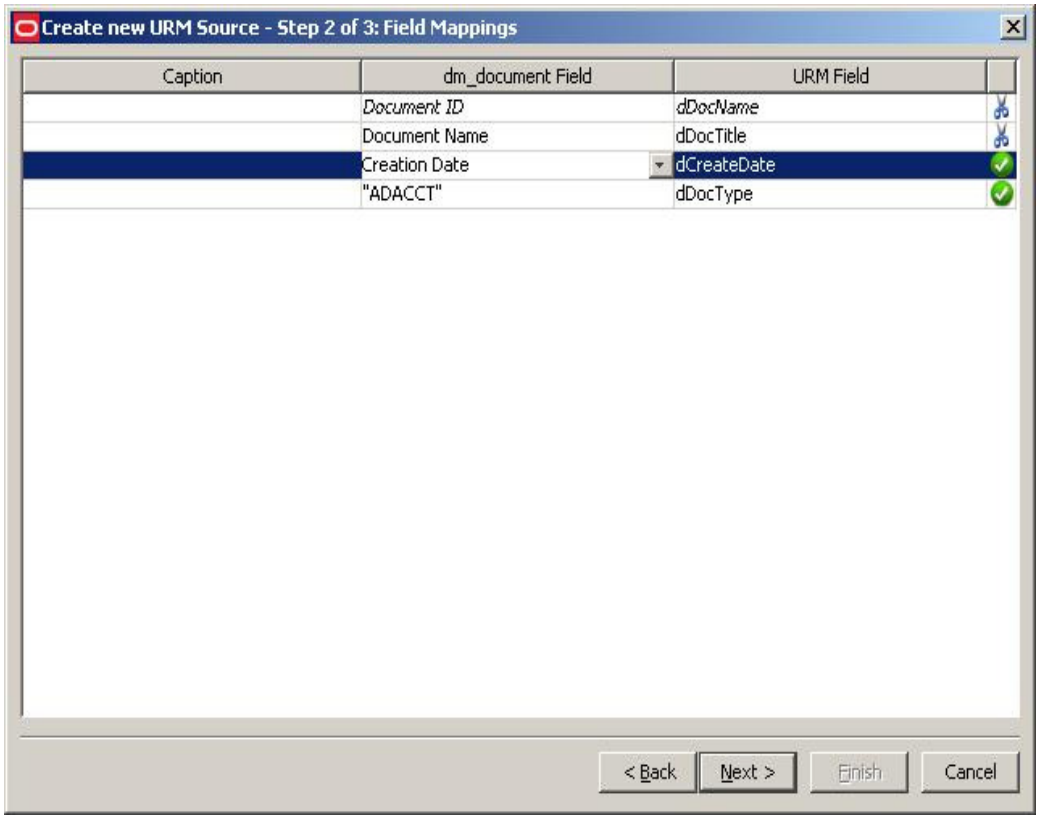


- Clicking on the **New** button a new window “Create new URM Source” opens. Enter a valid Name, Caption, Table name and select the Documentum repository for which the datasource is to be created. Then click Next button.

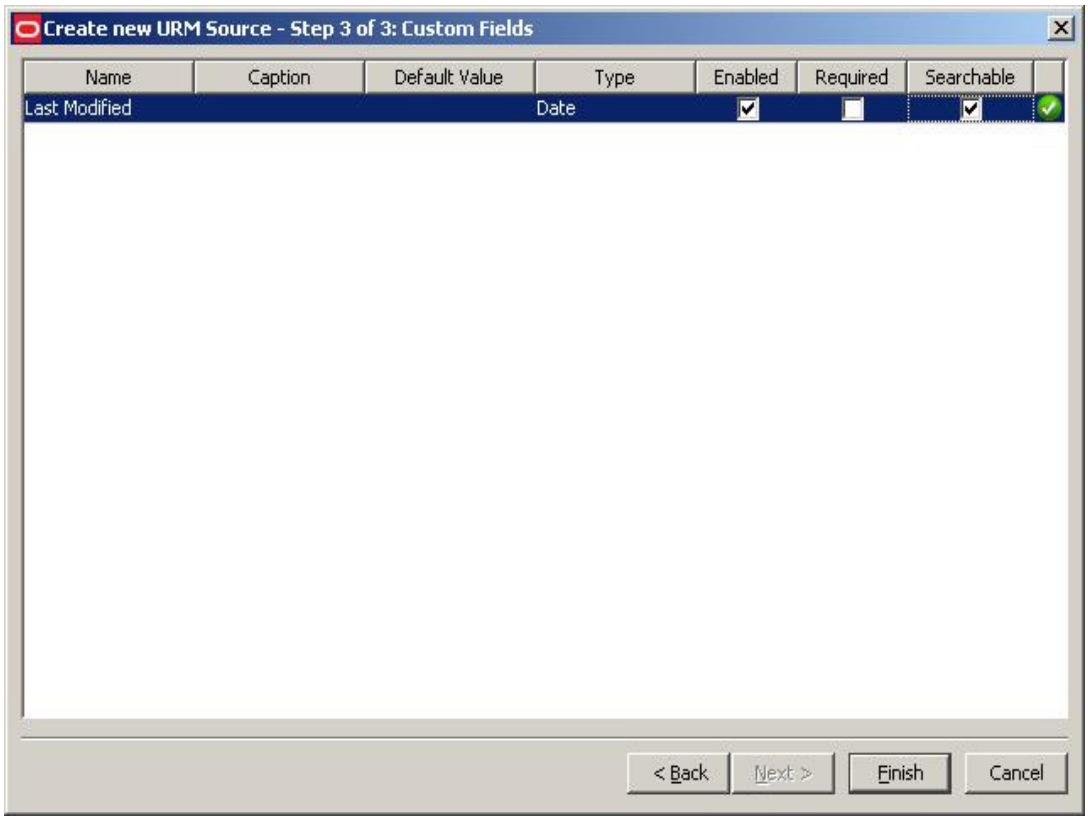




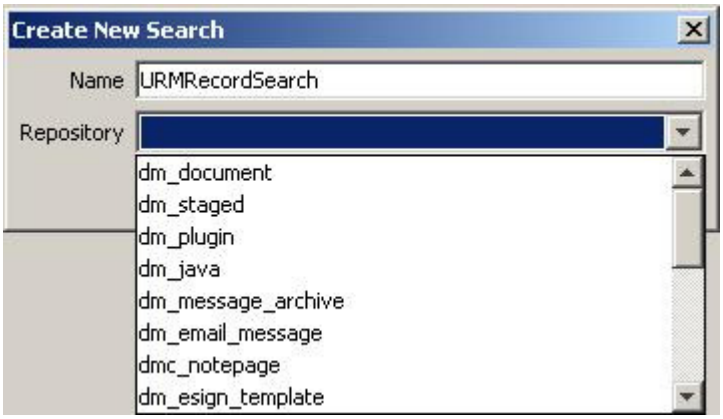
- Enter a Caption and map Documentum Repository fields to URM fields. Right click field Mapping window and select Add. Select any additional fields from URM and map them to the Documentum fields. E.g.: Select URM field as dDocType and map it to the corresponding Documentum Repository field. Click Next.



- In the next screen, make the last modified date as searchable by checking the Searchable checkbox. Click Finish.

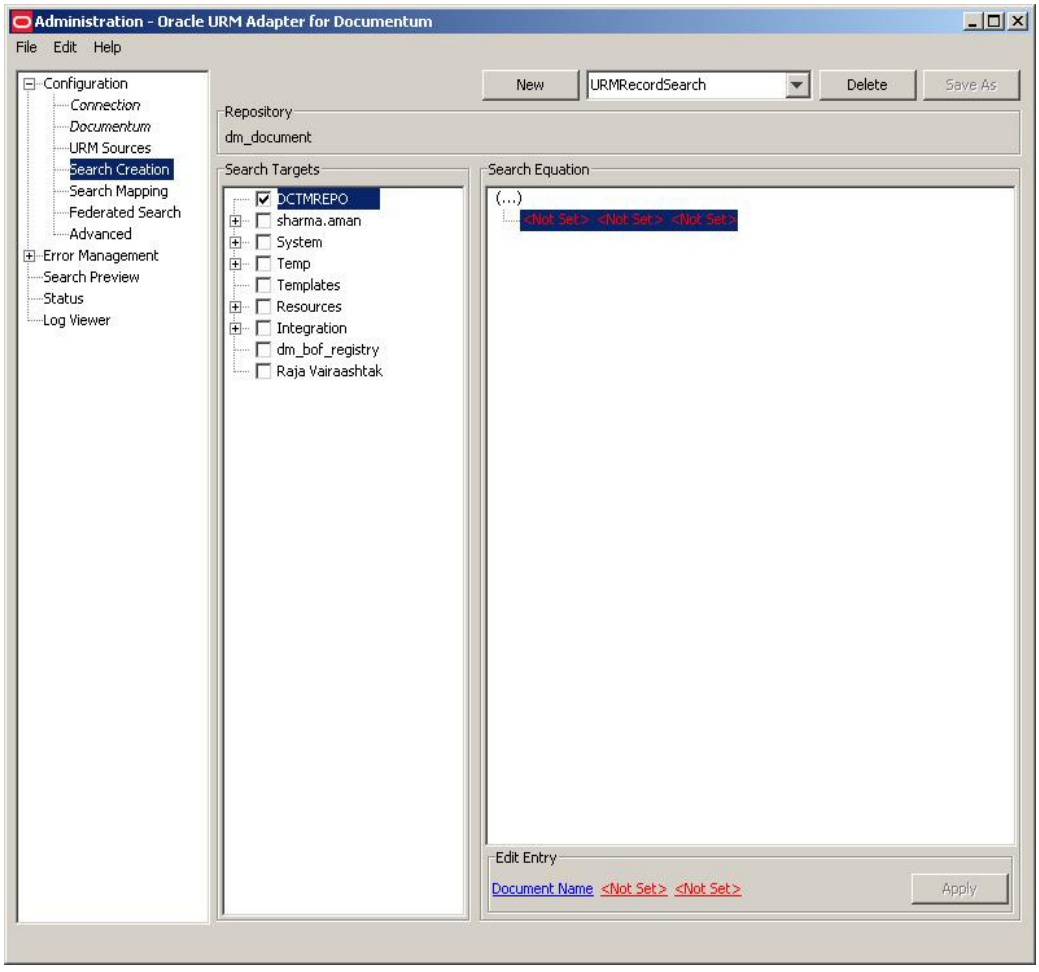


9. Click Search creation from the Configuration tray. Click New to open the "Create New Search". Enter the Search name and Repository type. Click OK.

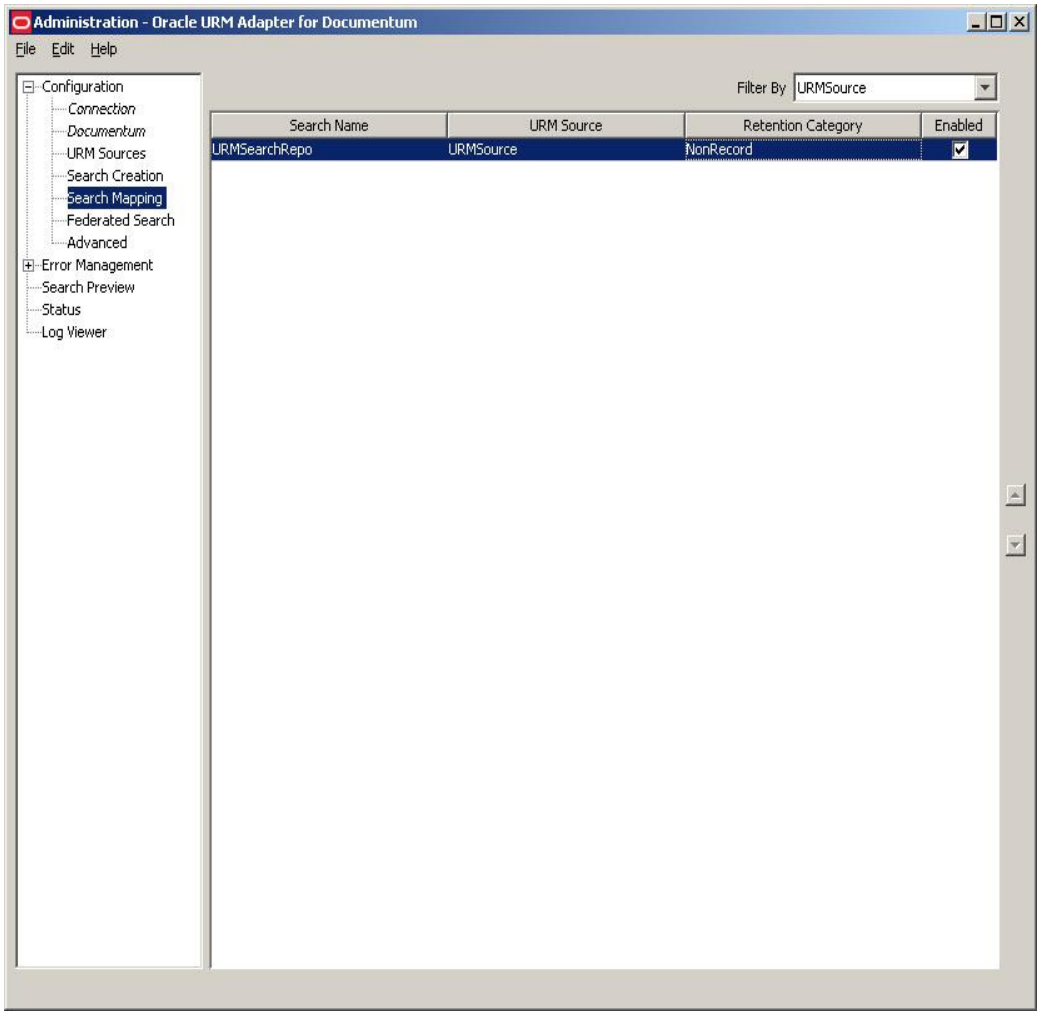


Note: - When defining a declaration search, a repository will be selected to limit the search to a document type. The document type that is selected for the repository will limit the search to finding only documents that are of that document type or any of its hierarchy of sub types. It is possible to further restrict the search to exclude the hierarchy of sub types or to isolate it to explicit sub types within that hierarchy. This is accomplished by adding terms to the search criteria to limit the search based on the 'Type' metadata field. If the search criterion is defined to require that the 'Type' metadata field is equal to the document type for the repository then that search will not find any of the document sub types for that repository. Explicit sub types can also be included as 'Type' metadata values to include in the search criteria. If the 'Type' metadata field is not explicitly referenced in the search criteria, the default behavior will find all document sub types for a repository's document type.

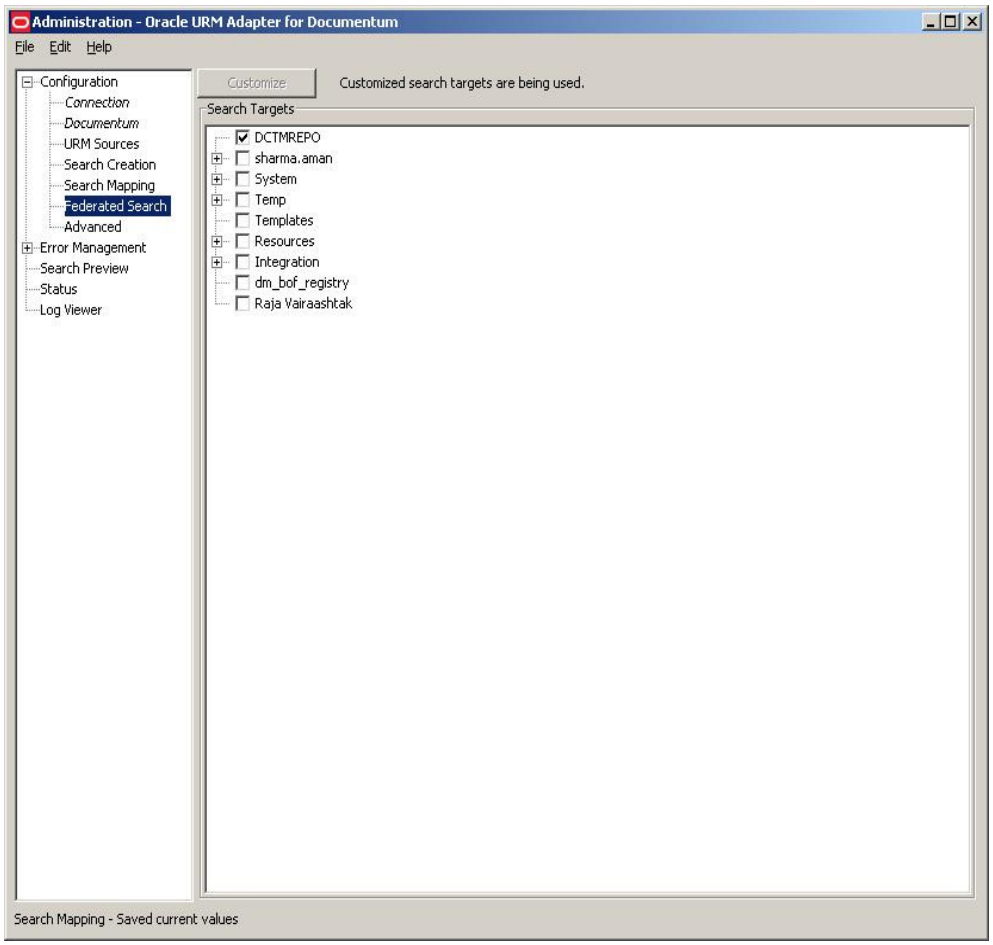
10. Select the search targets from Documentum Repository Cabinets/Folders. Right Click in the search equation screen and select "Add Terms/Add Groups" to enable the "Search Equation Fields". Define the search equation using the fields provided in the "Edit Entry" box and then click on <Apply> button. After entering all entries save the contents by clicking on "save" option of file menu. The New search name will be stored in dropdown list in search creation page.



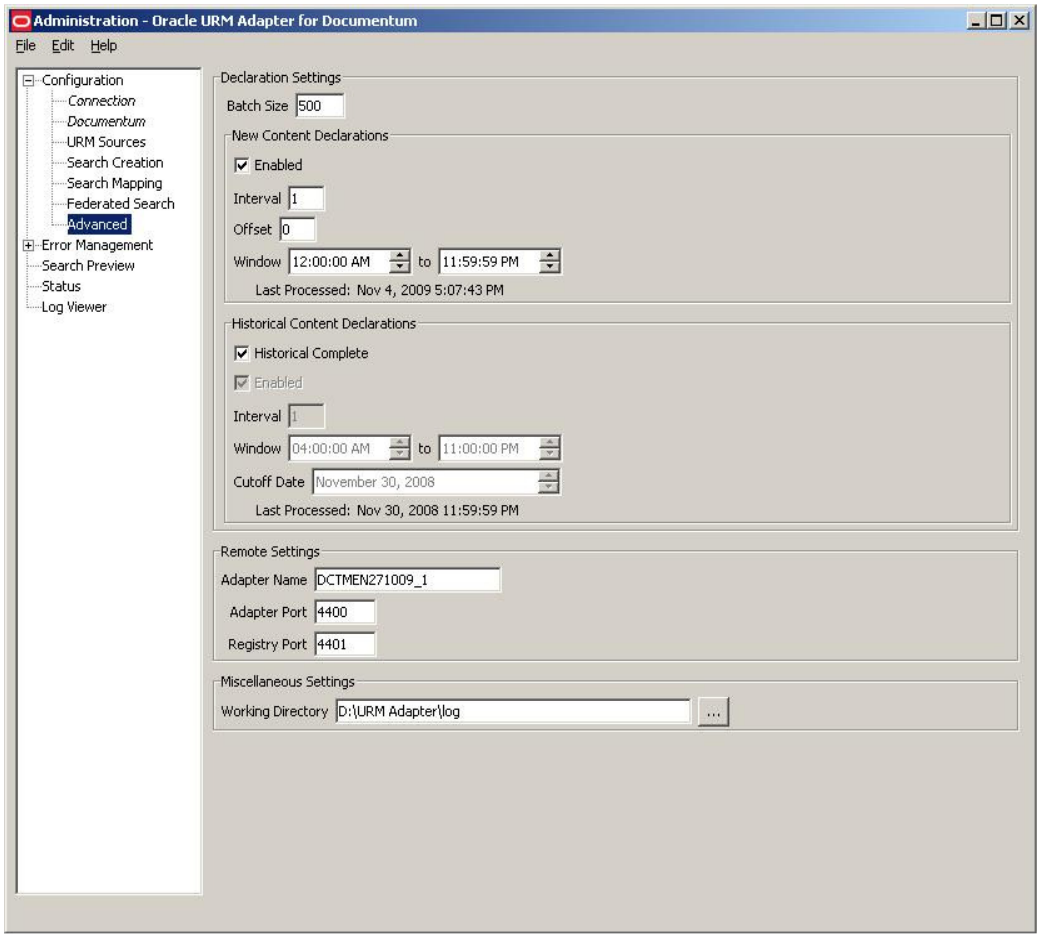
11. Click on the Search Mapping of Configuration tray. Select the search name from "Filter by" drop down list. Select URM source, Retention Category for a search. Save all the changes by clicking on Save option of file menu.



12. Click on the Federated Search of Configuration tray. If the federated search targets tree is not editable (grayed out) then the default federated search targets are being used. The default federated search targets are a union of the search targets that have been defined for all declaration searches. If this not a viable method for determining the federated search targets then Click the Custom button. The federated search targets tree will become editable so the desired federated search targets can be selected.



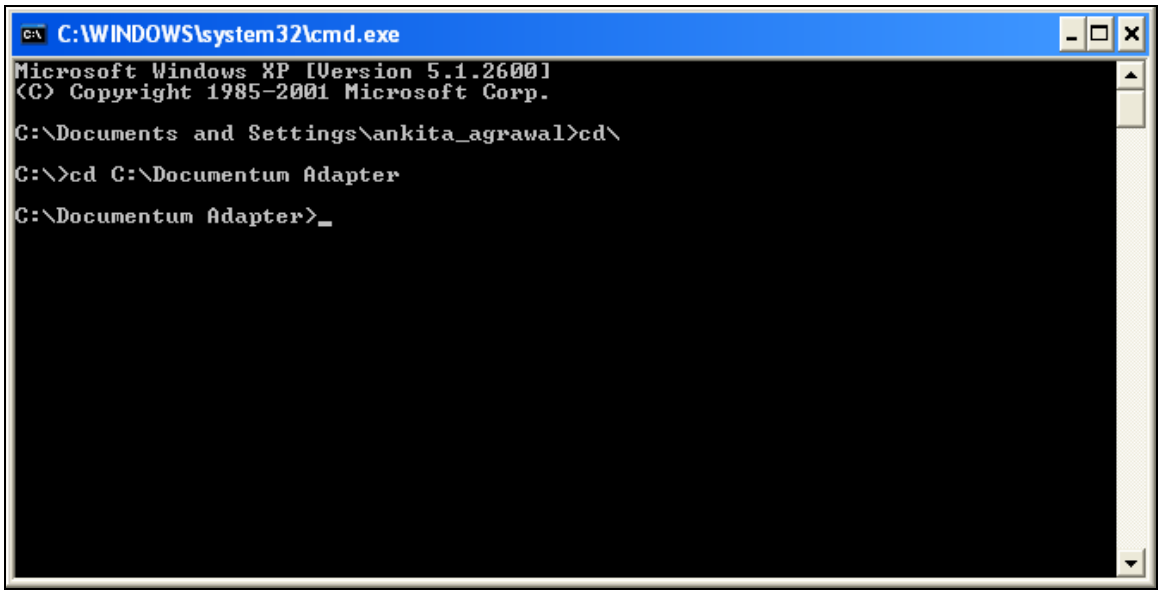
13. Enter data in the declaration settings of the advanced screen. New content declarations (for forward search) and historical content declarations (for backward search). Also provide the name for the adapter along with the ports and working directory information. Please note that the historical search runs backward in time starting from the Last processed date to the Cut off Date (Cut off Date should be any day before the Last Processed Date). The offset parameter can be used to account for any differences in the clocks on the adapter machine and the host repository machine. The offset time adjustment is based in minutes and is meant to keep the adapter from searching a time window that is in the future on the host repository machine.



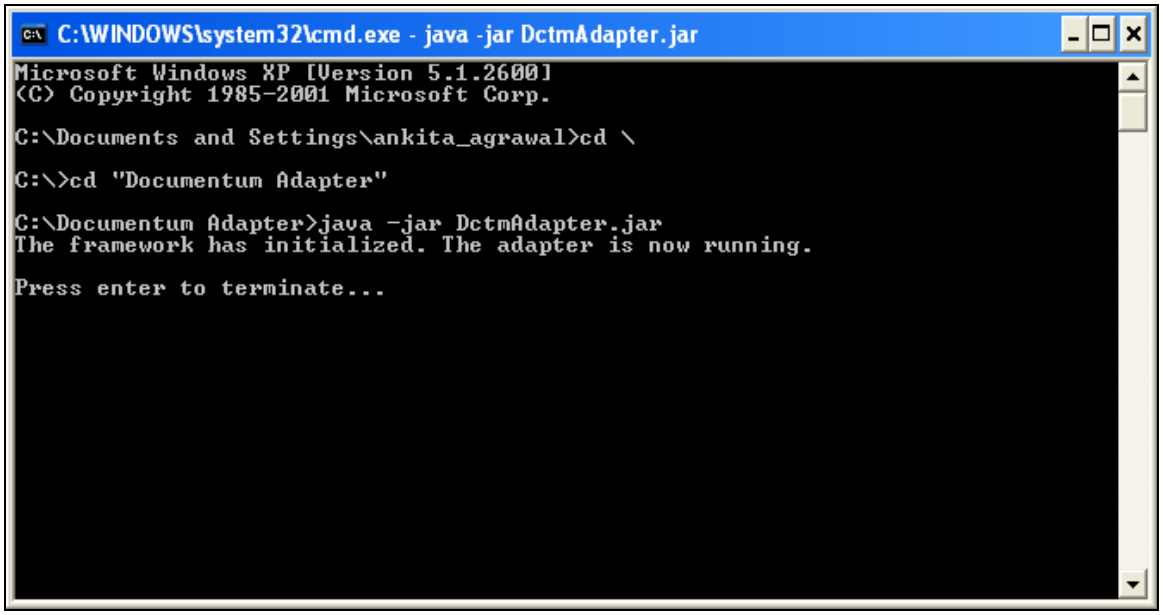
14. Before the search preview is displayed the DctmAdapter.jar file run. Open a second command prompt window by either of the two ways below:

Start →run→ type “cmd” in run window.
Or by
Start→programs→accessories→command prompt.

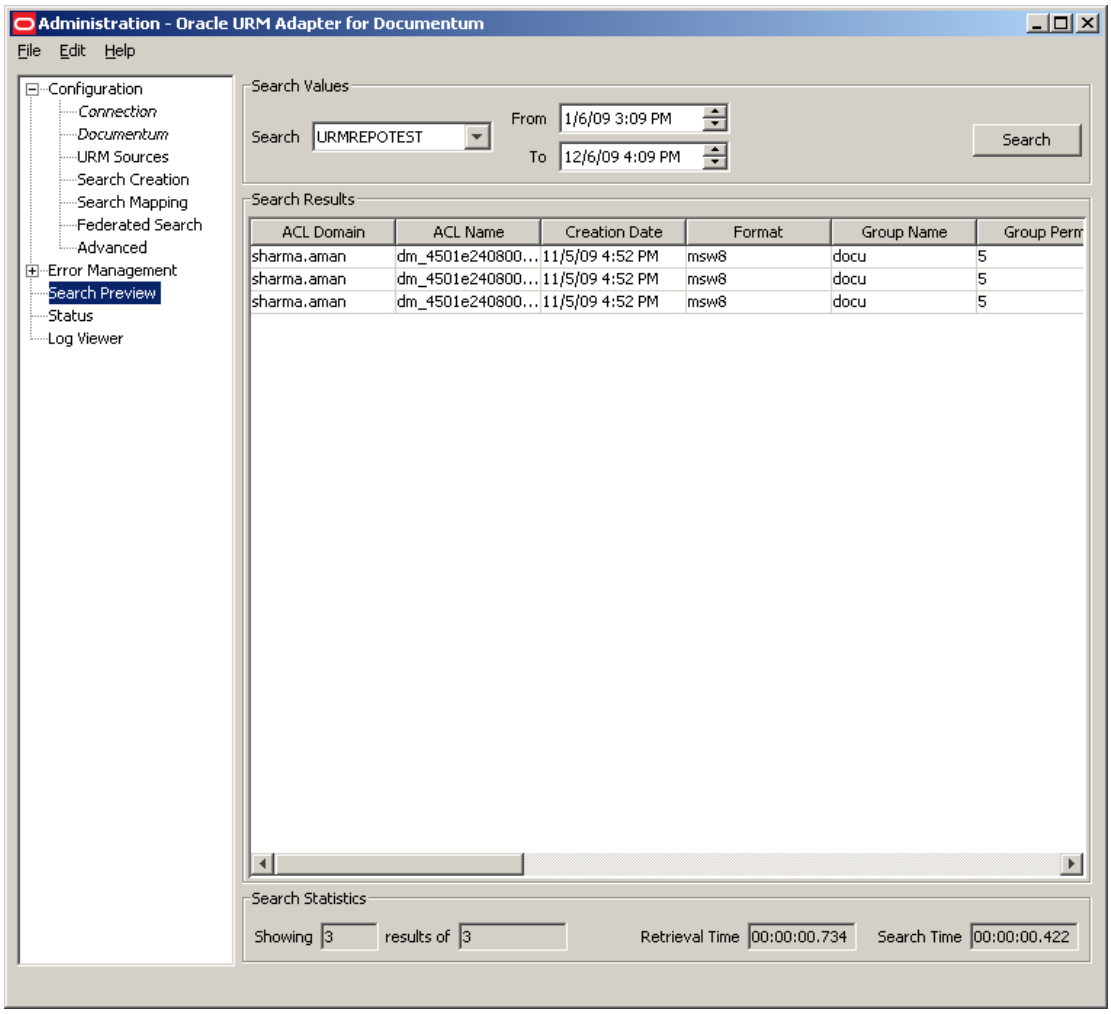
15. Now navigate to the directory where DctmAdapter.jar file is located (e.g.: path of DctmAdapter.jar file is C:\Documentum Adapter).



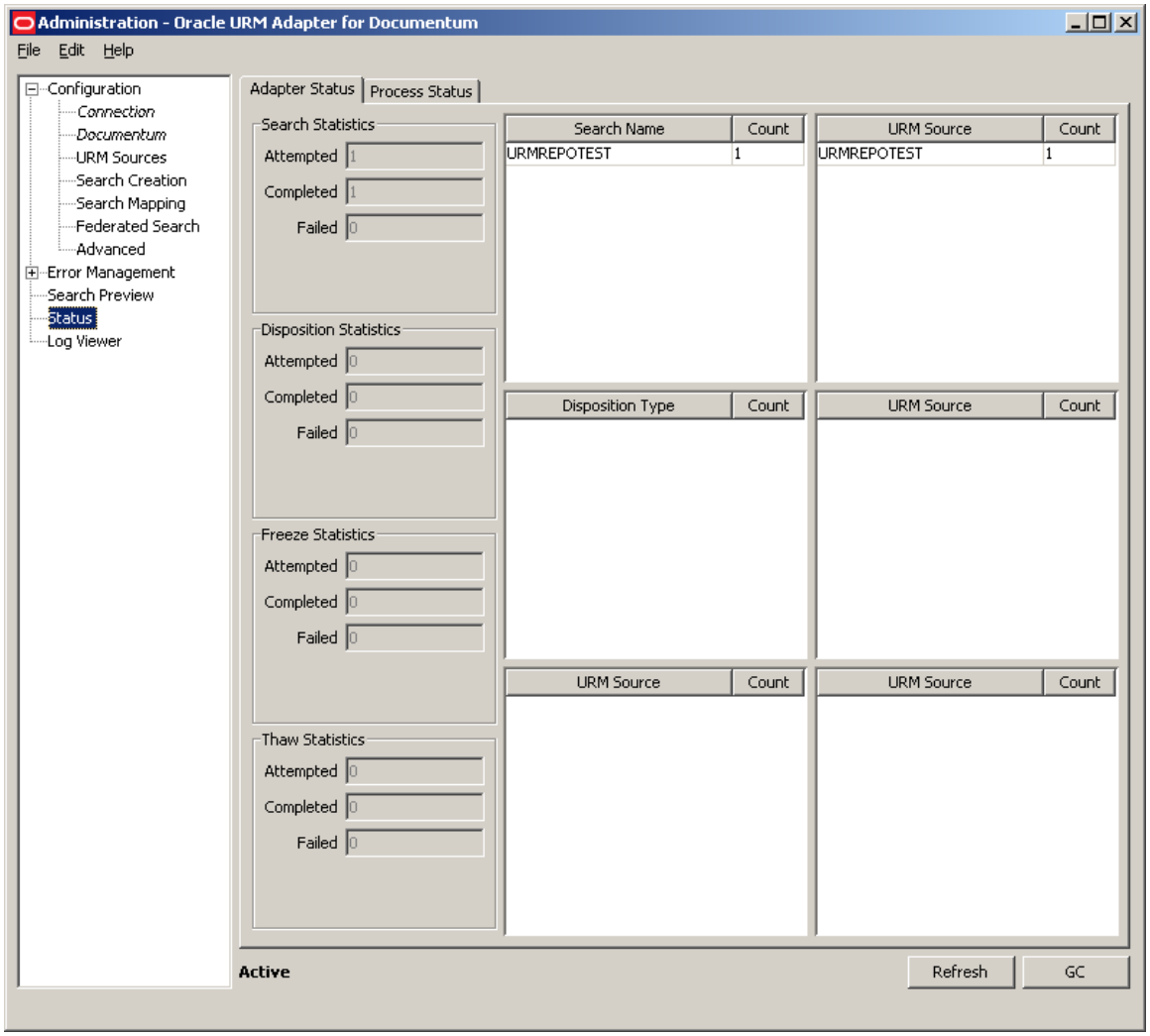
16. Execute the command java –jar DctmAdapter.jar in a command prompt to run the adapter jar file. This will initialize the adapter framework.



17. Search results based on a Search (created in Section 3.1, point 9) should be visible in the search preview screen. In the search preview screen select the appropriate search that needs to be run and set the time field. Now click on search and all the documents satisfying the search criteria get crawled. The details of all these searched documents are shown in the lower right hand side pane.

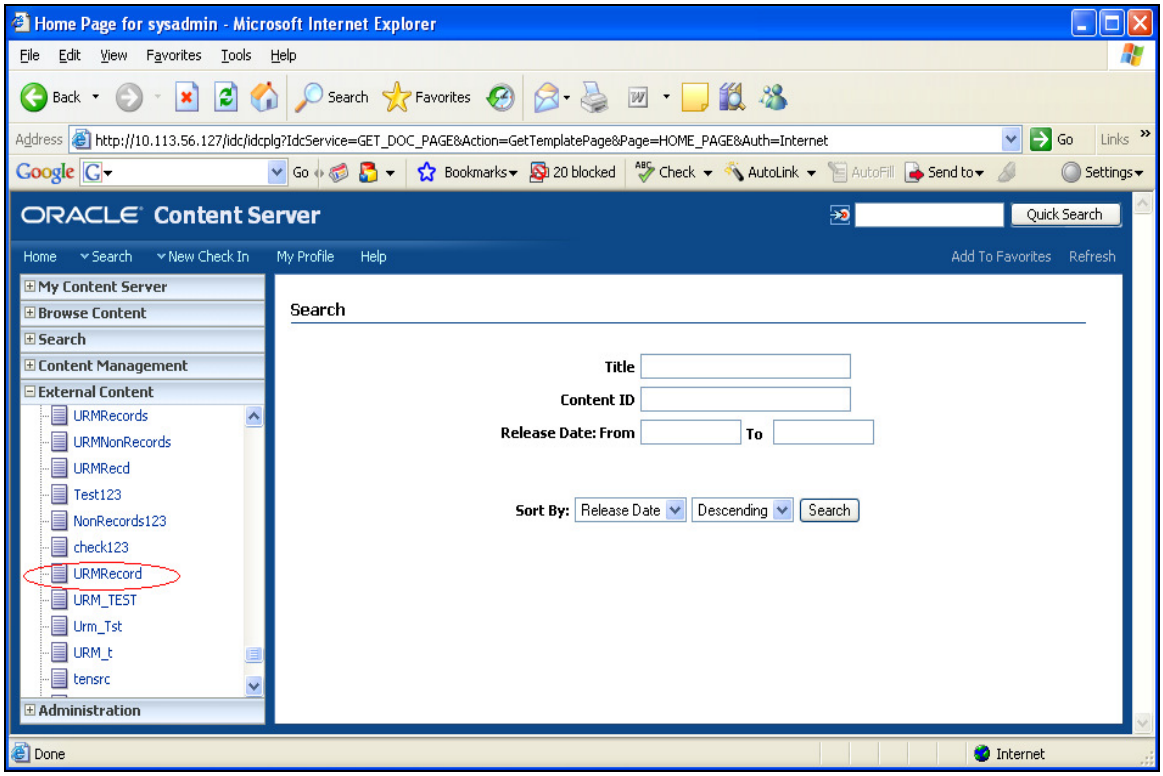


18. The status screen shows the status of Search, Disposition, Freeze and Thaw Statistics. Click the Refresh button to view the latest statistics.

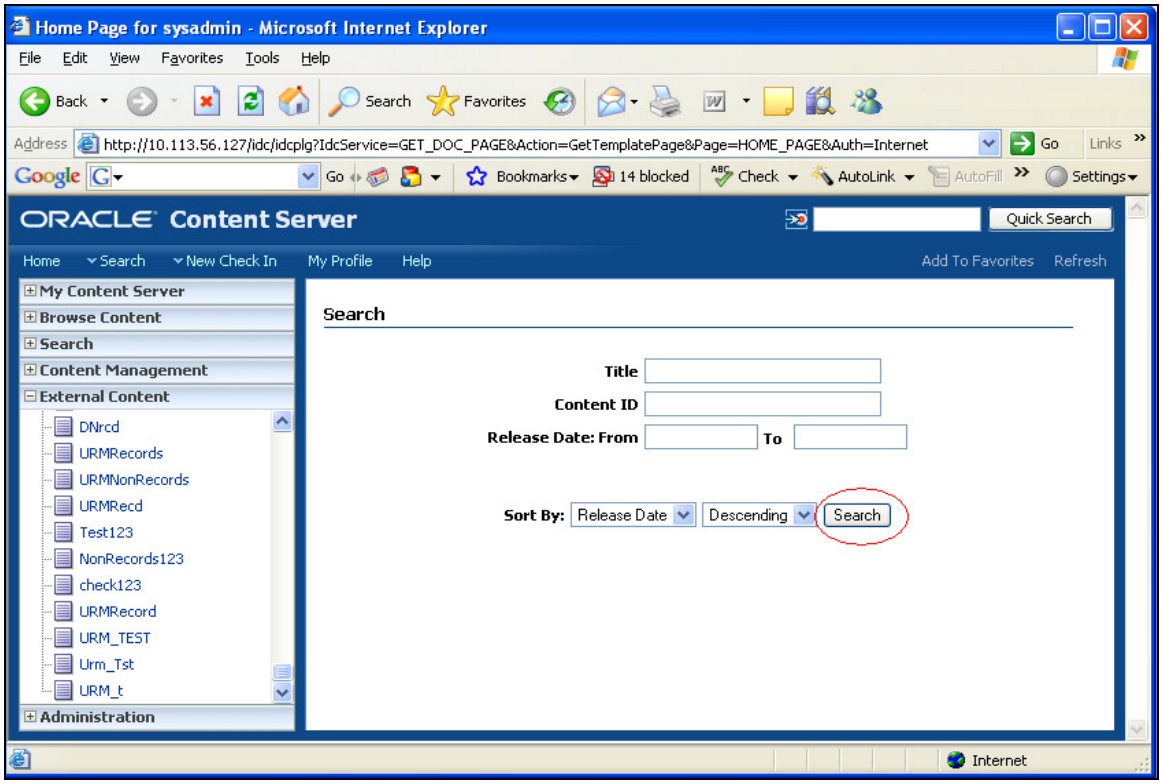


4 Sources created through administration as viewed from URM

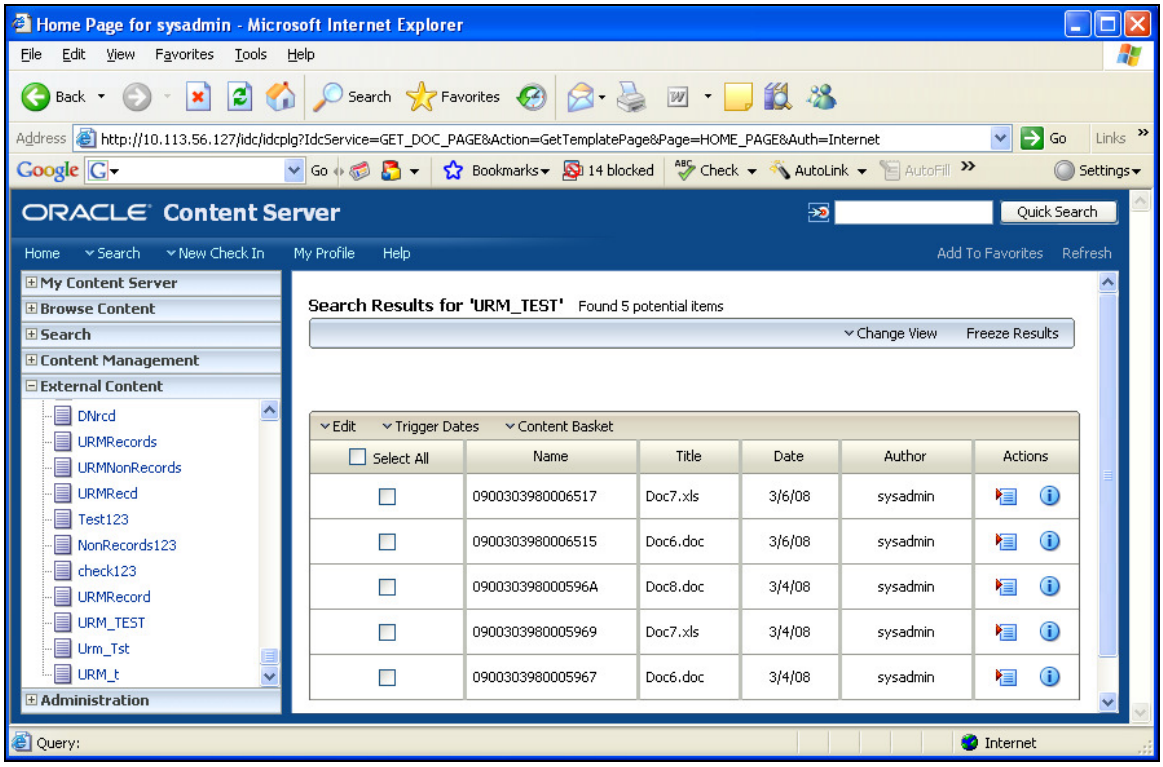
- The sources created above (Section 3.1, point 8) through administration file are seen in the external contents of the URM.



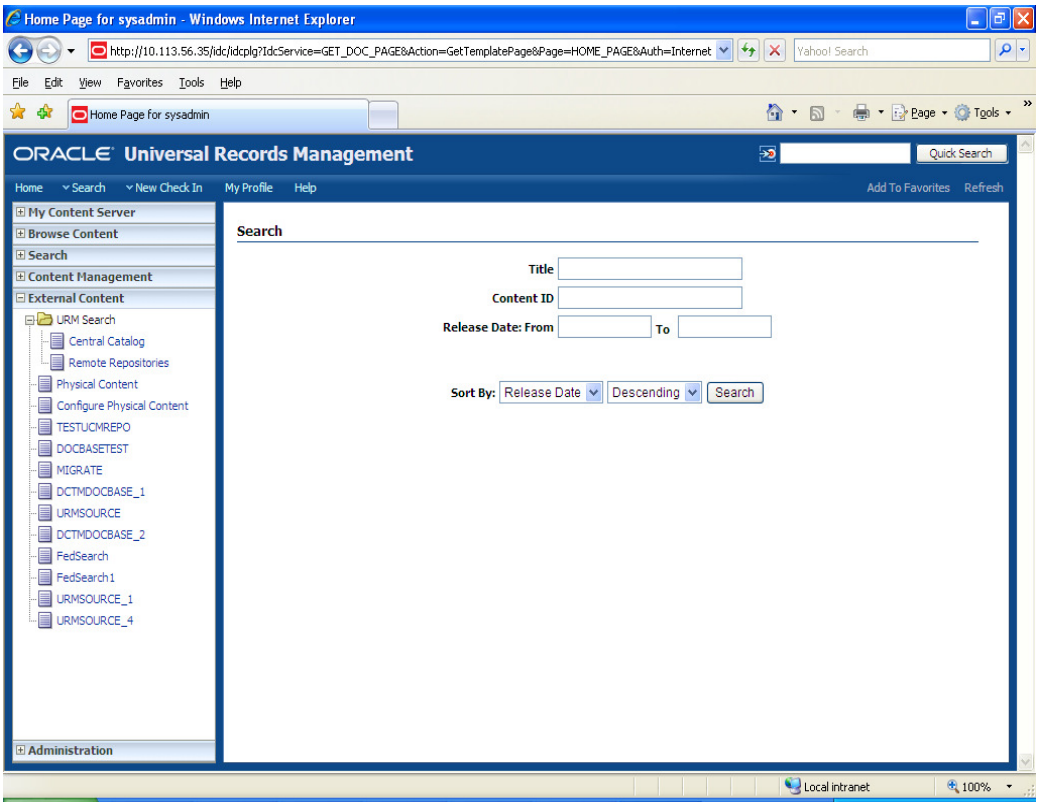
- Next click the Search button as shown in the screen below to list the documents that have been crawled.



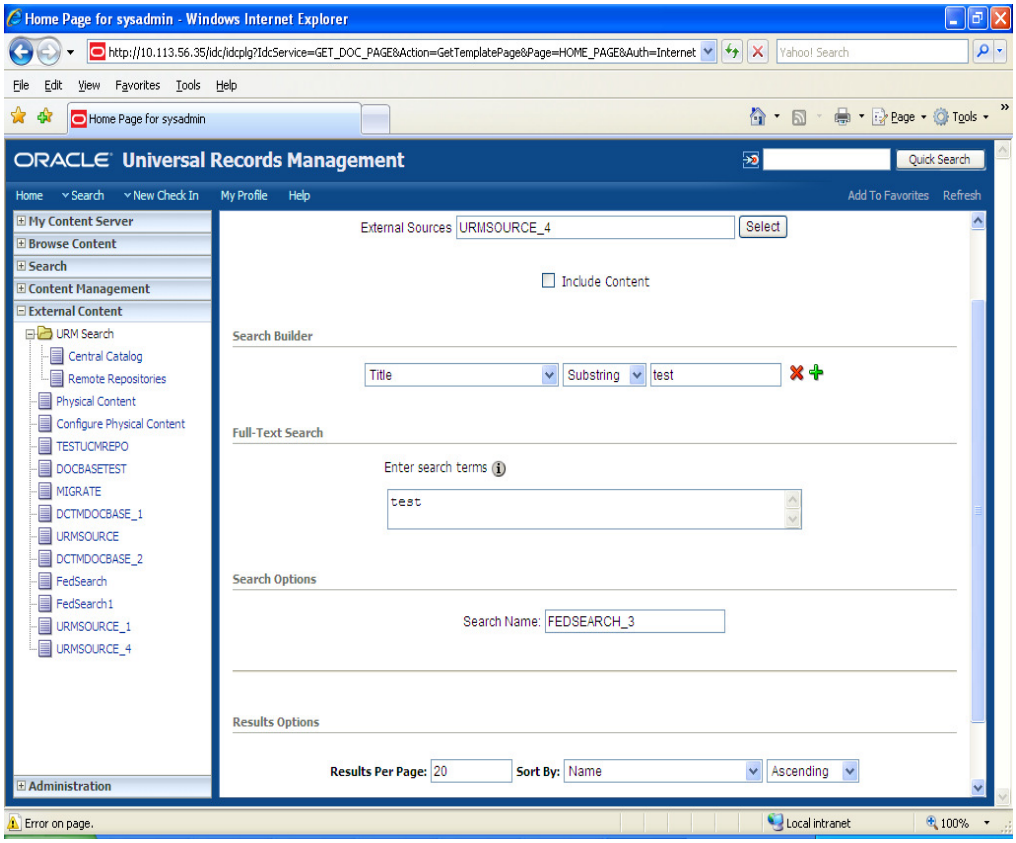
- The search results are shown below.



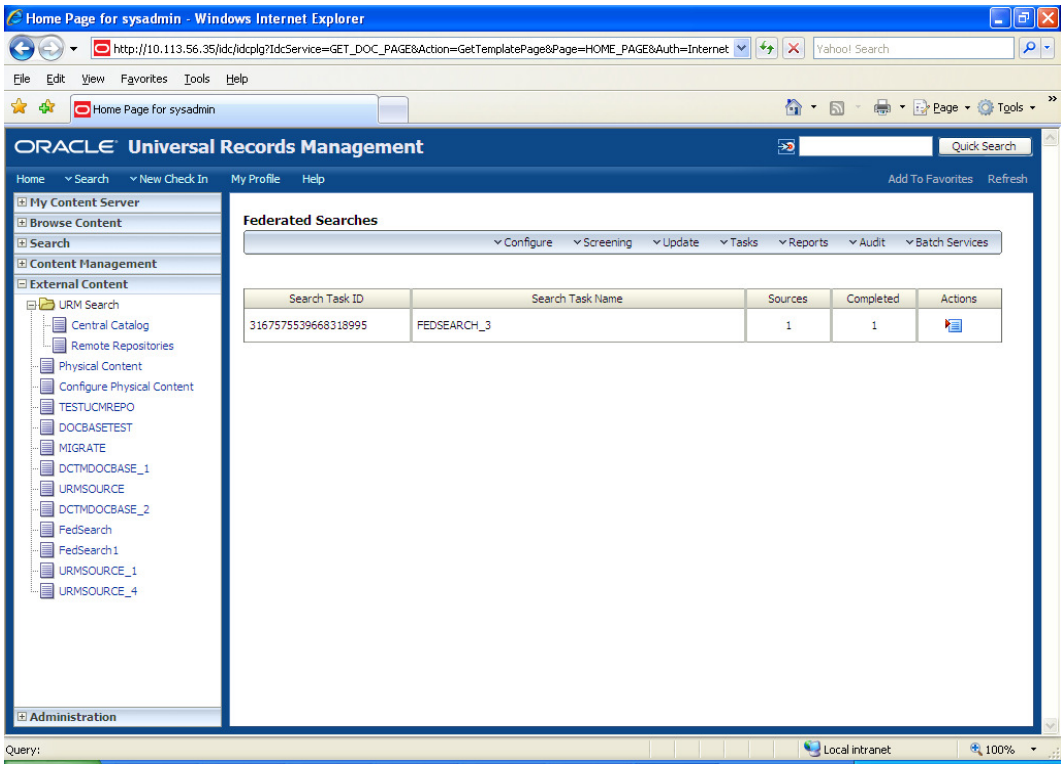
- Federated Search



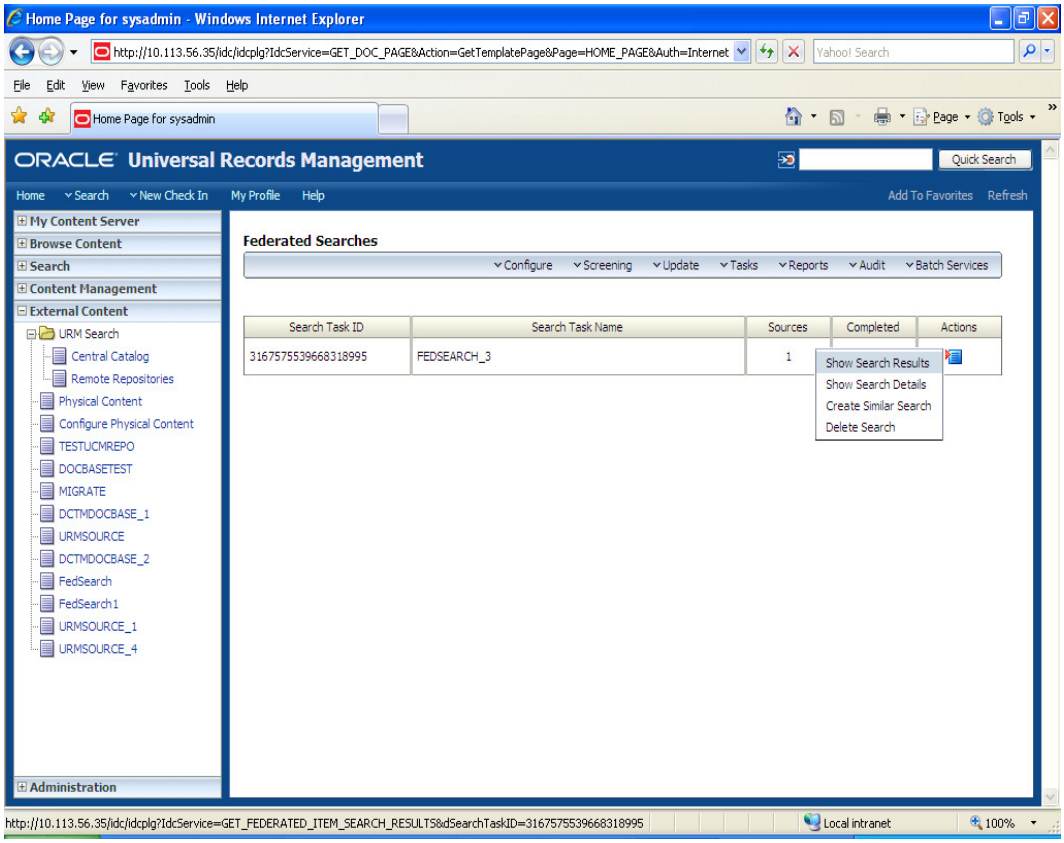
- Click on Remote Repositories under the External Content tab in URM Search link. Create search criteria and click search.



- The search criteria is visible under Federated Search



- Click on the icon under Actions and select Show Search Results to view the documents in Federated Search.



- The search results are shown below.