

Oracle® Universal Records Management

Oracle Universal Records Manager Adapter for Documentum Administration Guide

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Universal Records Manager Adapter for Documentum Administration Guide,
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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 DctmAdapter.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.

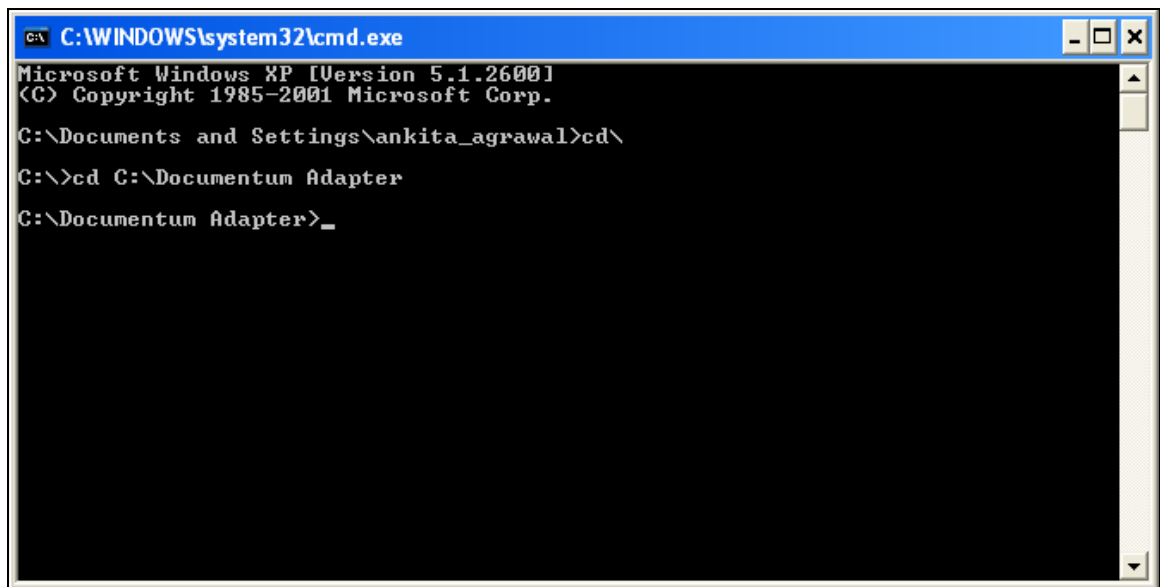
3 Detailed description

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:

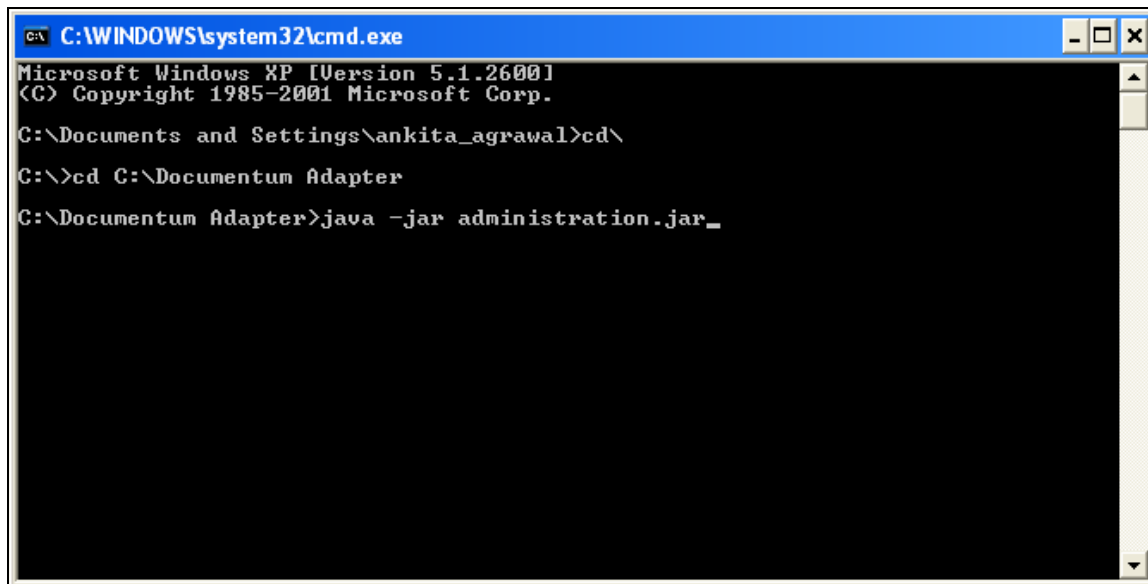
1. Open the command prompt either by
Start → run → type "cmd" in run window.
Or by
Start → programs → accessories → command prompt.
2. Change the path in the command prompt to the directory where administration.jar file is located. (e.g.: path of administration.jar file is C:\Documentum Adapter)



```
C:\WINDOWS\system32\cmd.exe
Microsoft Windows XP [Version 5.1.2600]
(C) Copyright 1985-2001 Microsoft Corp.

C:\Documents and Settings\ankita_agrawal>cd\
C:\>cd C:\Documentum Adapter
C:\Documentum Adapter>_
```

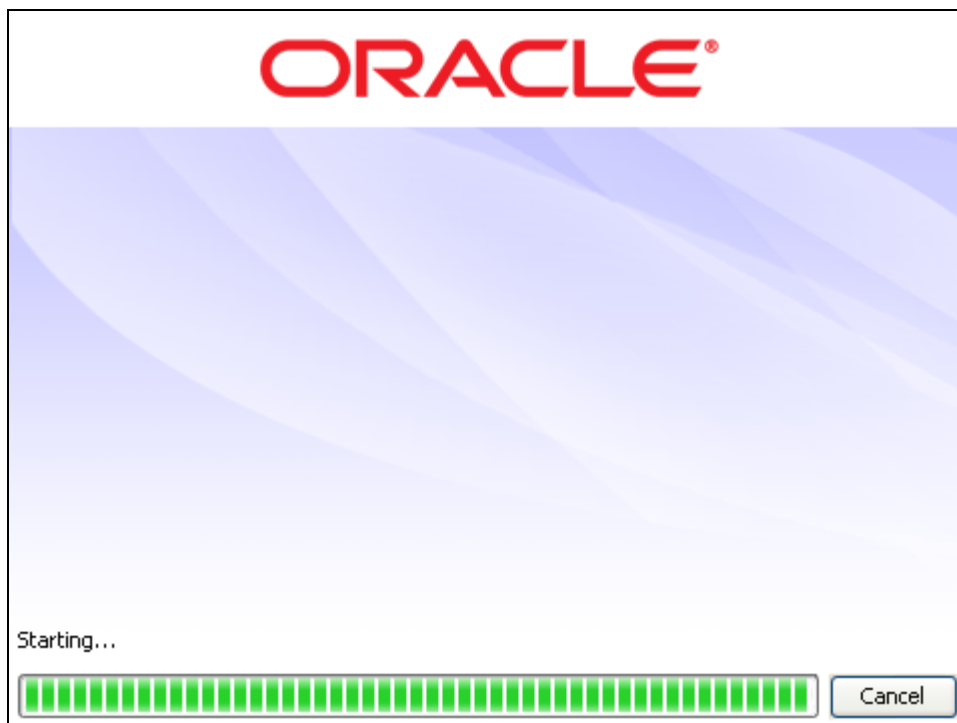
3. Execute the command `java -jar administration.jar` on command prompt to run the jar file.



```
C:\WINDOWS\system32\cmd.exe
Microsoft Windows XP [Version 5.1.2600]
(C) Copyright 1985-2001 Microsoft Corp.

C:\Documents and Settings\ankita_agrawal>cd\
C:\>cd C:\Documentum Adapter
C:\Documentum Adapter>java -jar administration.jar_
```

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.

The screenshot shows a window titled "Administration - Oracle URM Adapter for Documentum". The window has a menu bar with "File", "Edit", and "Help". On the left is a tree view with the following items: "Configuration" (expanded), "Documentum", "URM Sources", "Search Creation", "Search Mapping", "Federated Search", "Advanced", "Error Management", "Search Preview", "Status", and "Log Viewer". The "Configuration" section is active, showing three sub-sections: "URM Configuration", "Database Configuration", and "Connection Pool".

URM Configuration:

- User ID: sysadmin
- Password: ***
- URL: http://10.113.48.218/idc/idcplg

Database Configuration:

- User ID: dctm
- Password: *****
- Driver: Oracle (selected from a dropdown menu)
- Connection: jdbc:oracle:thin:@10.113.48.218:1521:oracle

Connection Pool:

- Connections: 5
- Growable: ☒

At the bottom of the window, a status bar reads "Connection - Saved current values".

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/jdc/jdcplg

Database Configuration

User ID dcm

Password *****

Driver Oracle

Connection jdbc:oracle:thin:@10.113.48.218:1521:oracle

Connection Pool

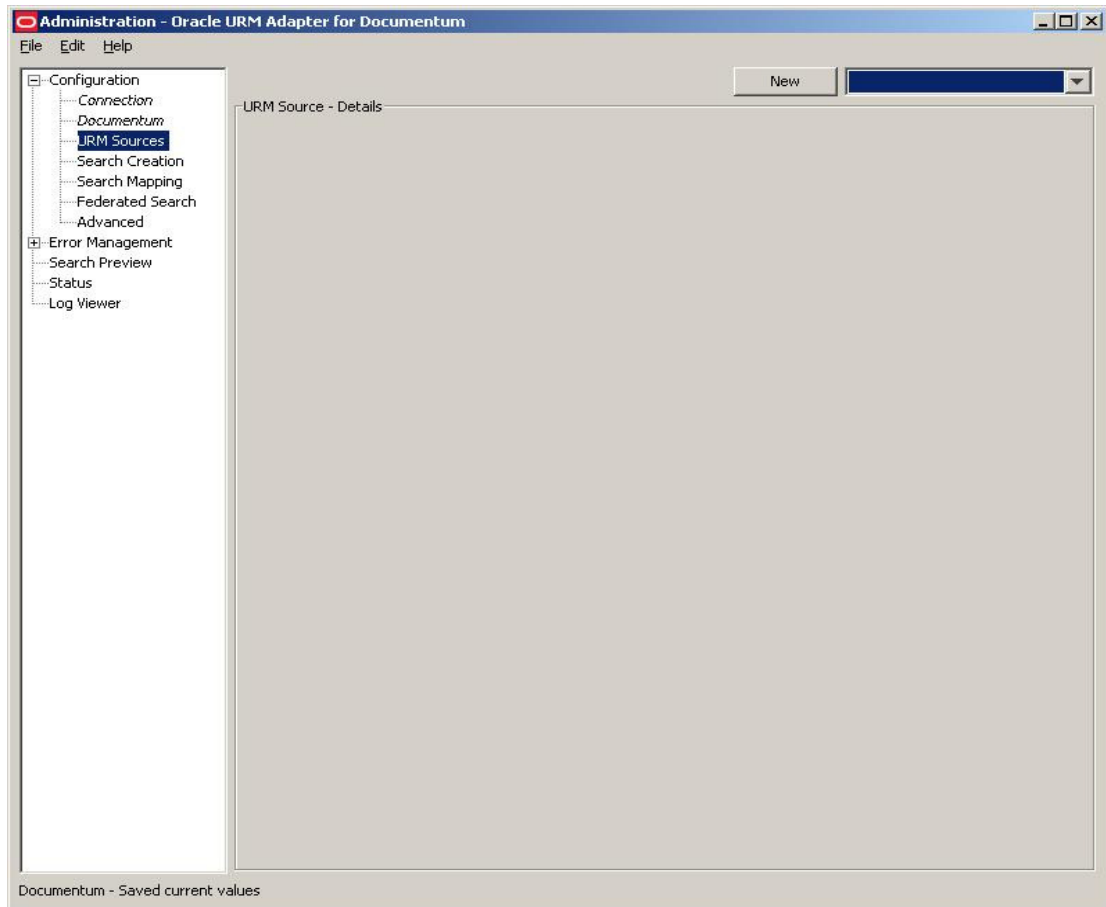
Connections 5

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.

The screenshot shows a web application window titled "Administration - Oracle URM Adapter for Documentum". The window has a menu bar with "File", "Edit", and "Help". On the left is a tree view under "Configuration" with the following items: "Connection", "Documentum" (highlighted), "URM Sources", "Search Creation", "Search Mapping", "Federated Search", "Advanced", "Error Management", "Search Preview", "Status", and "Log Viewer". The main content area is titled "Documentum Connection" and contains three input fields: "User ID" with the value "system", "Password" with the value "*****", and "DocBase" with the value "DCTMREPO".

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.

Create new URM Source - Step 1 of 3: Source Information

General

Name Caption

Table

Repository

Add Defaults ☒

Repository Fields

Type	Name	Size
------	------	------

< Back Next > Finish Cancel

Create new URM Source - Step 1 of 3: Source Information

General

Name Caption

Table

Repository

Add Defaults ☒

Repository Fields

Type	Name	Size
------	------	------

dm_document
dm_staged
dm_plugin
dm_java
dm_message_archive
dm_email_message
dmc_notepage
dm_esign_template

< Back Next > Finish Cancel

- 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.

Caption	dm_document Field	URM Field
	Document ID	dDocName
	Document Name	dDocTitle
	Creation Date	dCreateDate
	"ADACCT"	dDocType

< Back Next > Finish Cancel

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

Name	Caption	Default Value	Type	Enabled	Required	Searchable
Last Modified			Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

< Back Next > Finish Cancel

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.

Create New Search

Name: URMRecordSearch

Repository:
dm_document
dm_staged
dm_plugin
dm_java
dm_message_archive
dm_email_message
dmc_notepage
dm_esign_template

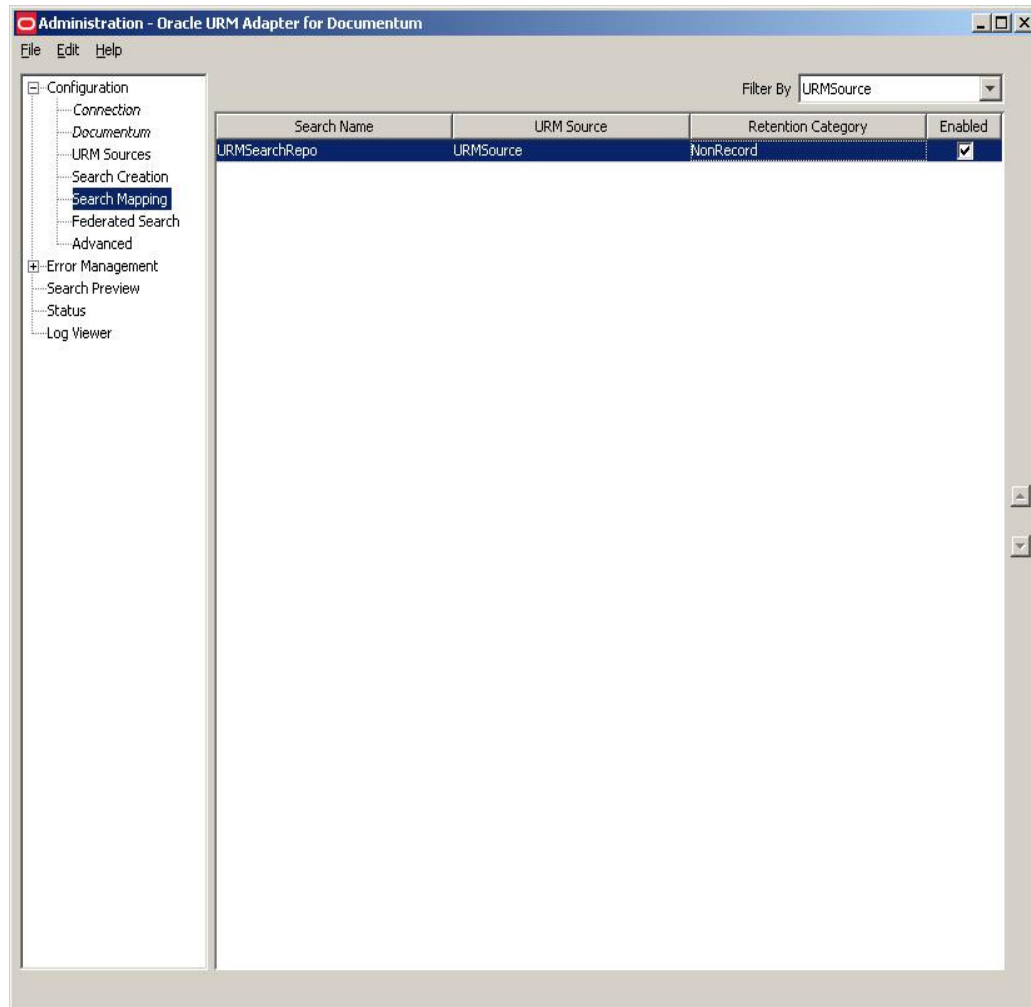


Note: - When defining a declaration search, a repository will be selected to limit the search to a document type. The document type that is selected for the repository will limit the search to finding only documents that are of that document type or any of its hierarchy of sub types. It is possible to 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.

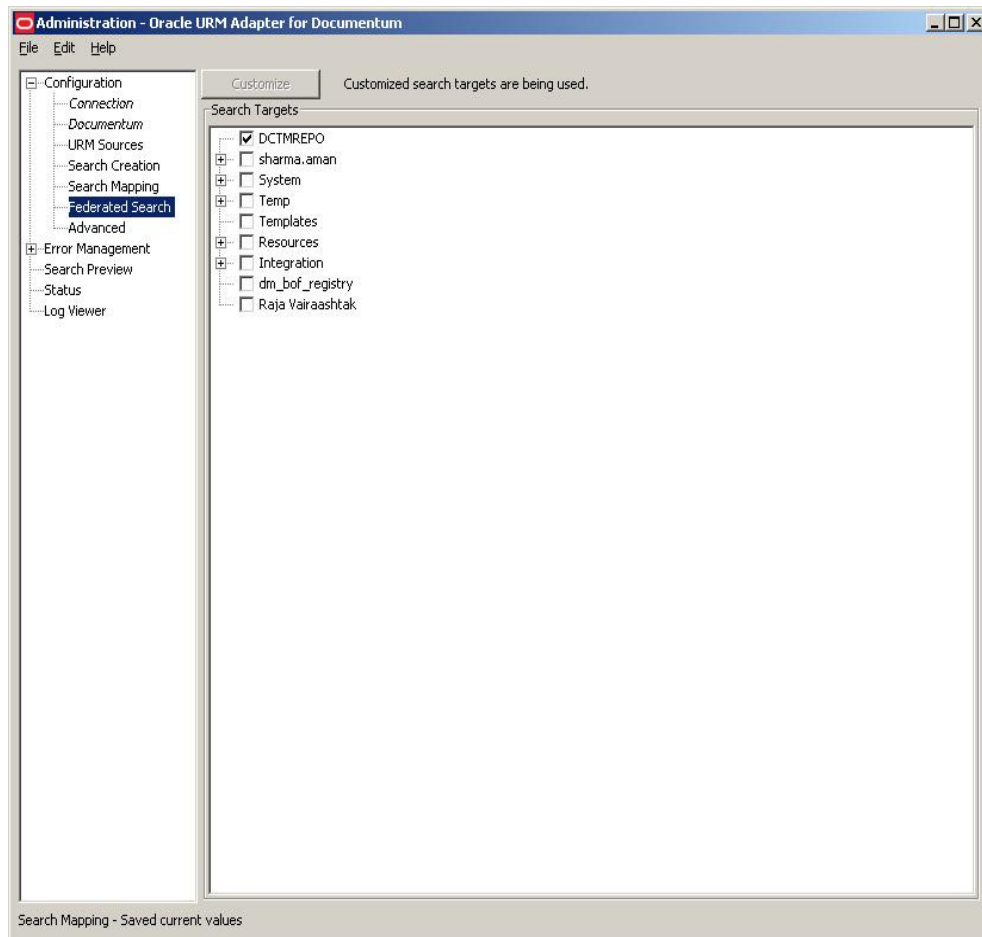
10. Select the search targets from Documentum Repository Cabinets/Folders. Right Click in the search equation screen and select "Add Terms/Add Groups" to enable the "Search Equation Fields". Define the search equation using the fields provided in the "Edit Entry" box and then click on <Apply> button. 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.

The screenshot shows the 'Administration - Oracle URM Adapter for Documentum' window. The left sidebar contains a tree view with the following items: Configuration, Connection, Documentum, URM Sources, Search Creation (highlighted), Search Mapping, Federated Search, Advanced, Error Management, Search Preview, Status, and Log Viewer. The main area is divided into three sections: Repository, Search Targets, and Search Equation. The Repository section shows 'dm_document'. The Search Targets section lists several targets with checkboxes: DCTMREPO (checked), sharma.aman, System, Temp, Templates, Resources, Integration, dm_bof_registry, and Raja Vairashtak. The Search Equation section shows a text area with the content '(<Not Set> <Not Set> <Not Set>'. At the bottom, there is an 'Edit Entry' section with a text field containing 'Document Name <Not Set> <Not Set>' and an 'Apply' button. The top of the window has a menu bar (File, Edit, Help) and a toolbar with buttons for 'New', 'Delete', and 'Save As'.

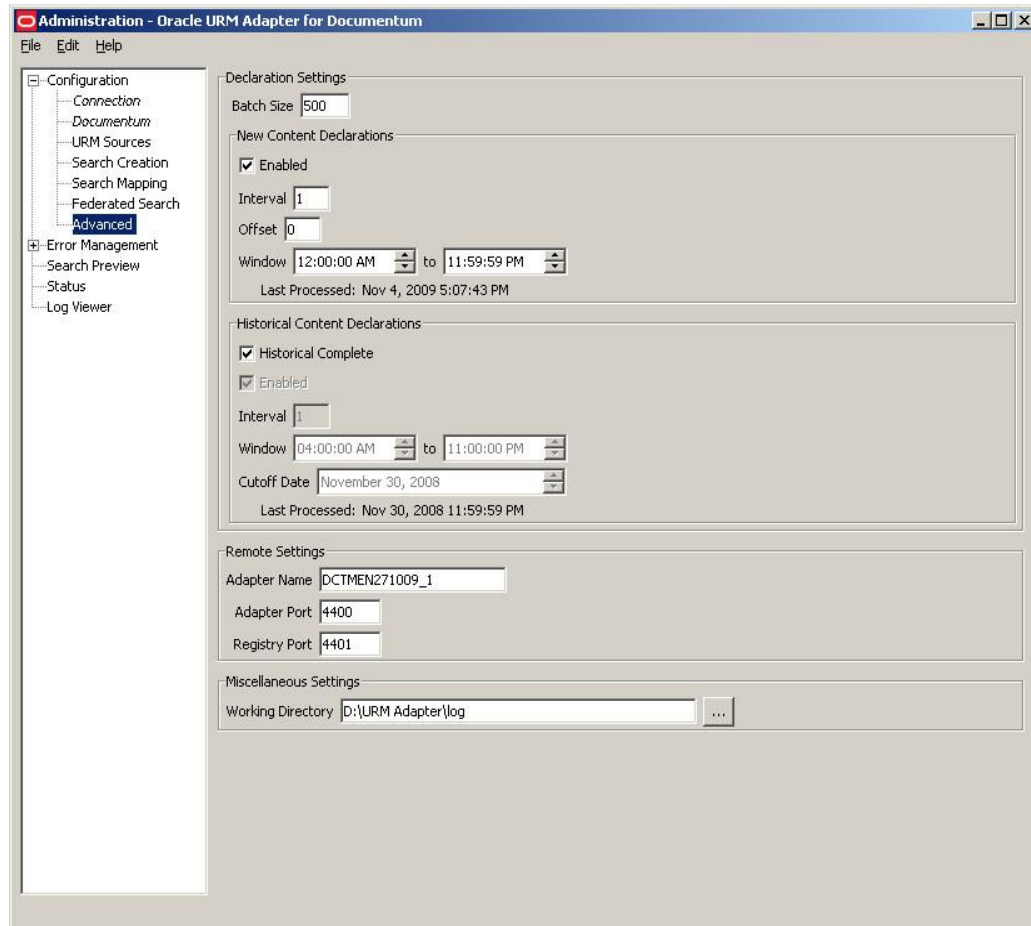
11. Click on the Search Mapping of Configuration tray. Select the search name from “Filter by” drop down list. Select URM source, Retention Category for a search. Save all the changes by clicking on Save option of file menu.



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.



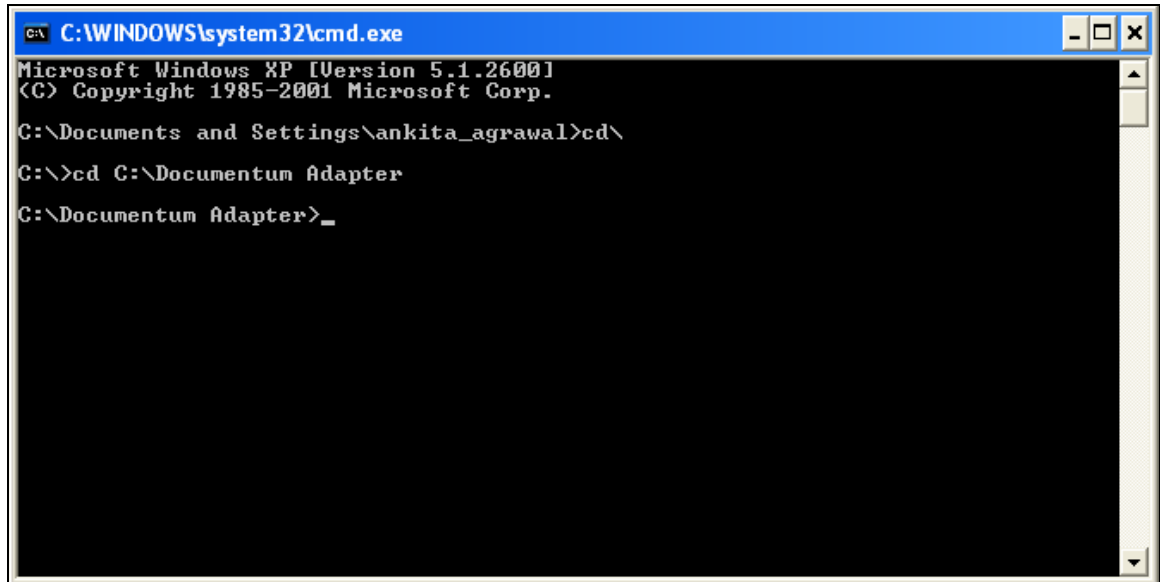
14. Before the search preview is displayed the DctmAdapter.jar file run. Open a second command prompt window by either of the two ways below:

Start → run → type "cmd" in run window.

Or by

Start → programs → accessories → command prompt.

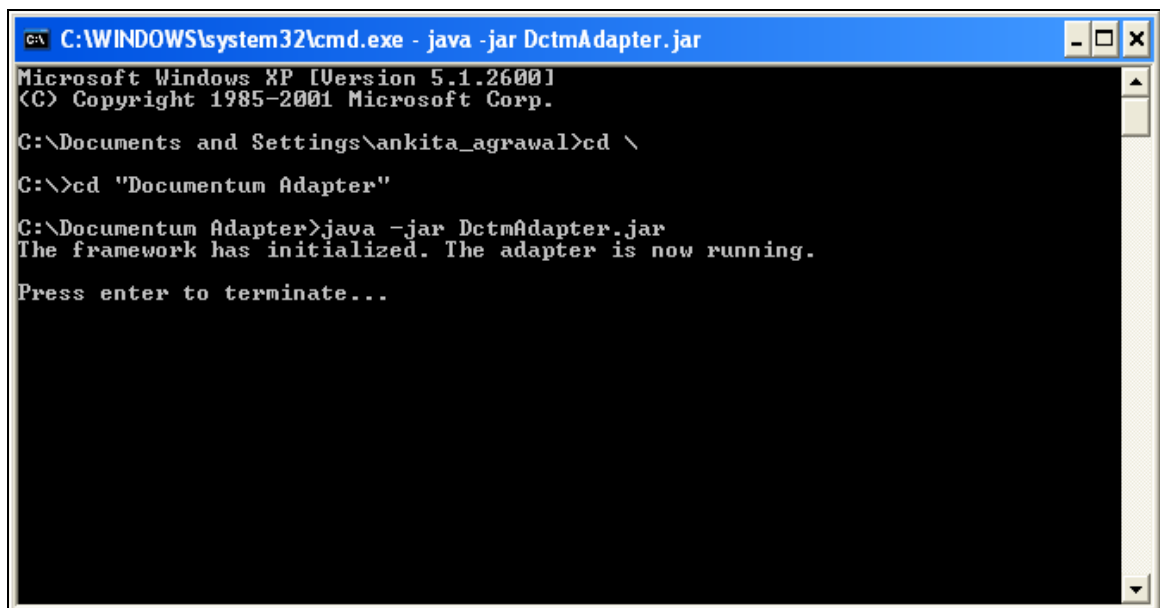
15. Now navigate to the directory where DctmAdapter.jar file is located (e.g.: path of DctmAdapter.jar file is C:\Documentum Adapter).



```
C:\WINDOWS\system32\cmd.exe
Microsoft Windows XP [Version 5.1.2600]
(C) Copyright 1985-2001 Microsoft Corp.

C:\Documents and Settings\ankita_agrawal>cd \
C:\>cd C:\Documentum Adapter
C:\Documentum Adapter>_
```

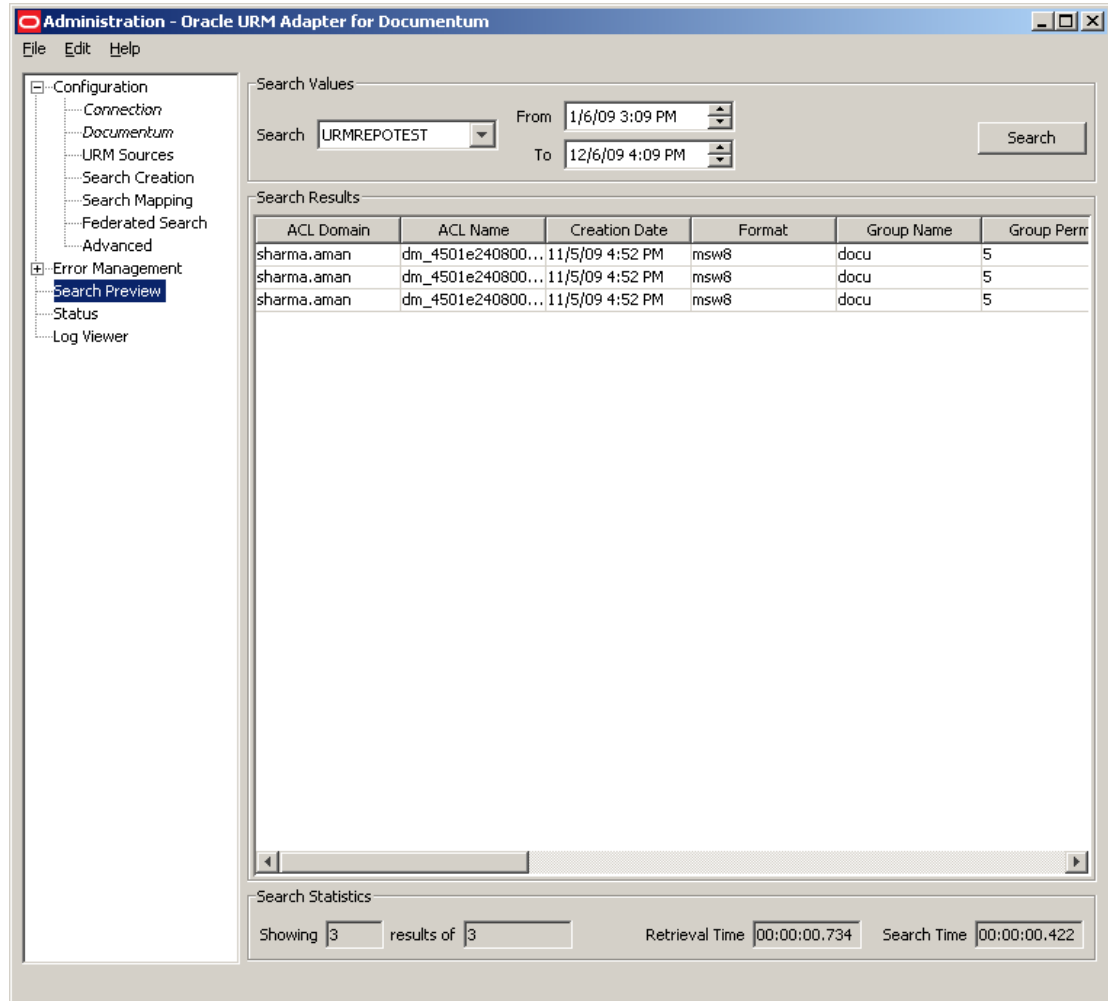
16. Execute the command `java -jar DctmAdapter.jar` in a command prompt to run the adapter jar file. This will initialize the adapter framework.



```
C:\WINDOWS\system32\cmd.exe - java -jar DctmAdapter.jar
Microsoft Windows XP [Version 5.1.2600]
(C) Copyright 1985-2001 Microsoft Corp.

C:\Documents and Settings\ankita_agrawal>cd \
C:\>cd "Documentum Adapter"
C:\Documentum Adapter>java -jar DctmAdapter.jar
The framework has initialized. The adapter is now running.
Press enter to terminate...
```

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.

The screenshot shows the 'Administration - Oracle URM Adapter for Documentum' window. The 'Status' tab is selected in the left-hand navigation pane. The main area displays statistics for Search, Disposition, Freeze, and Thaw operations. The 'Search Statistics' section shows 1 Attempted, 1 Completed, and 0 Failed. The 'Disposition Statistics' section shows 0 Attempted, 0 Completed, and 0 Failed. The 'Freeze Statistics' section shows 0 Attempted, 0 Completed, and 0 Failed. The 'Thaw Statistics' section shows 0 Attempted, 0 Completed, and 0 Failed. The 'Search Name' table shows one entry: URMREPOTEST with a count of 1. The 'Disposition Type' table is empty. The 'URM Source' table is empty. The 'URM Source' table is empty. The 'Active' status is shown at the bottom left. The 'Refresh' and 'GC' buttons are at the bottom right.

Search Name	Count
URMREPOTEST	1

Disposition Type	Count
------------------	-------

URM Source	Count
------------	-------

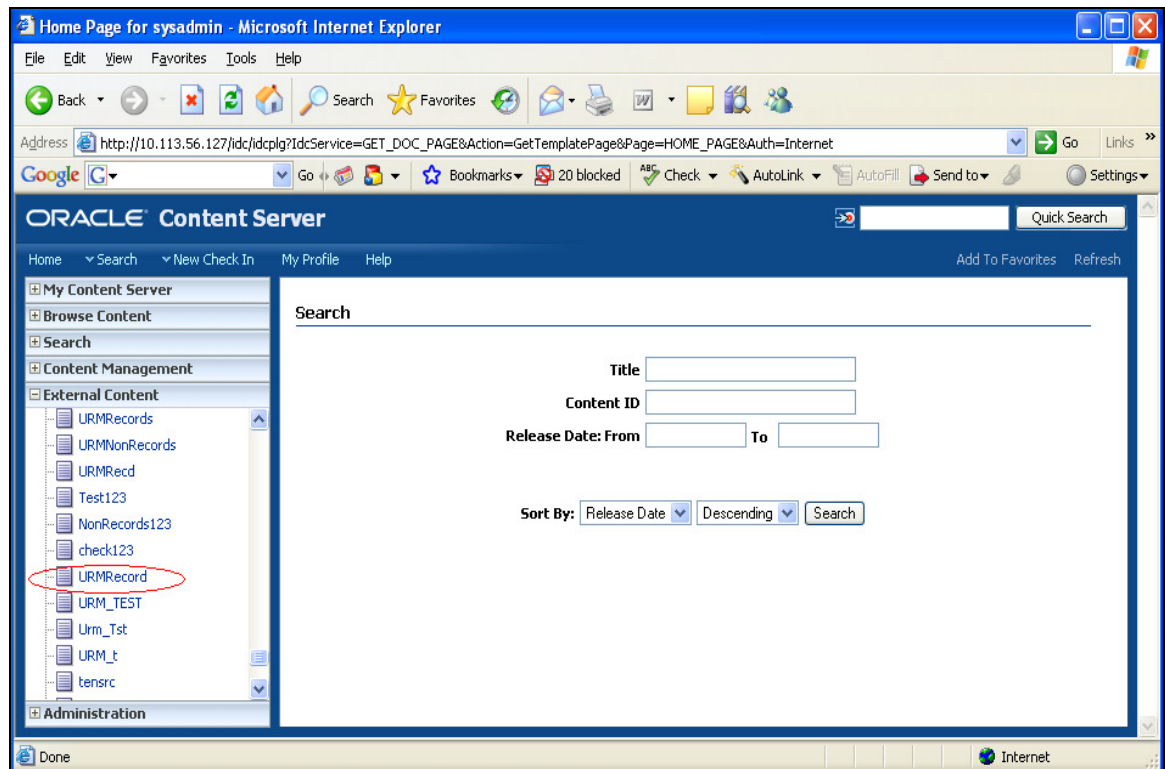
URM Source	Count
------------	-------

Active

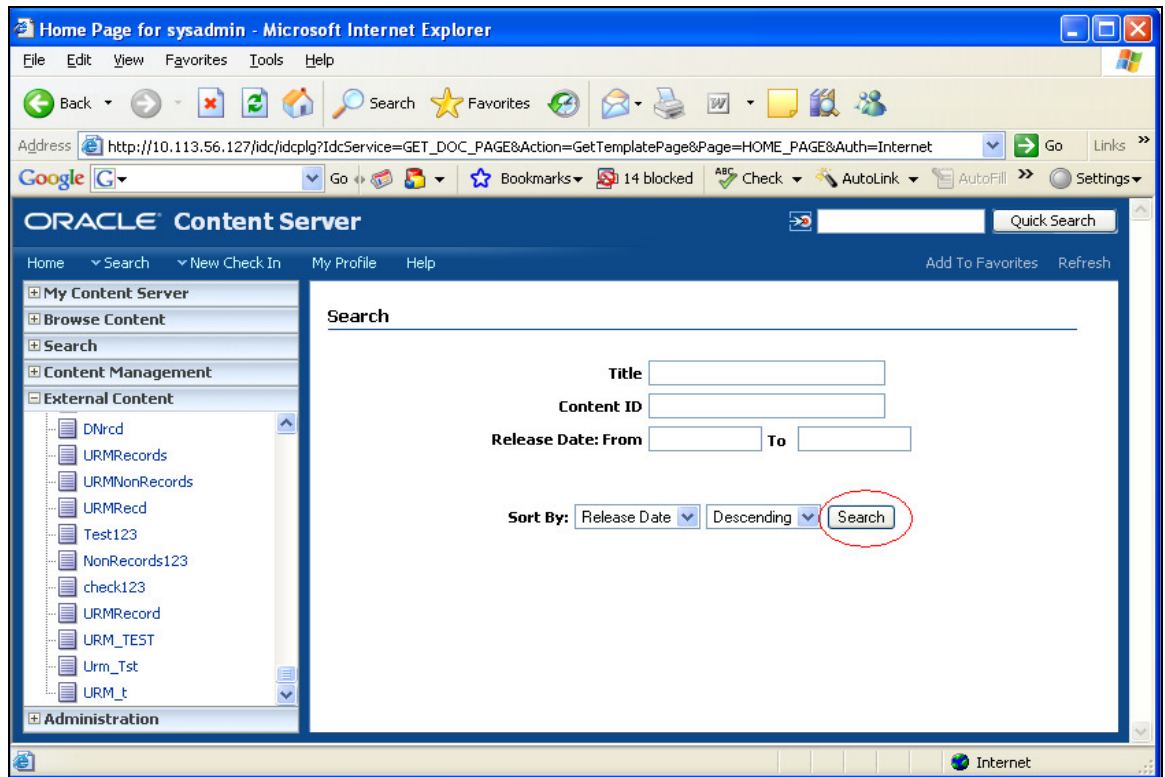
Refresh GC

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.

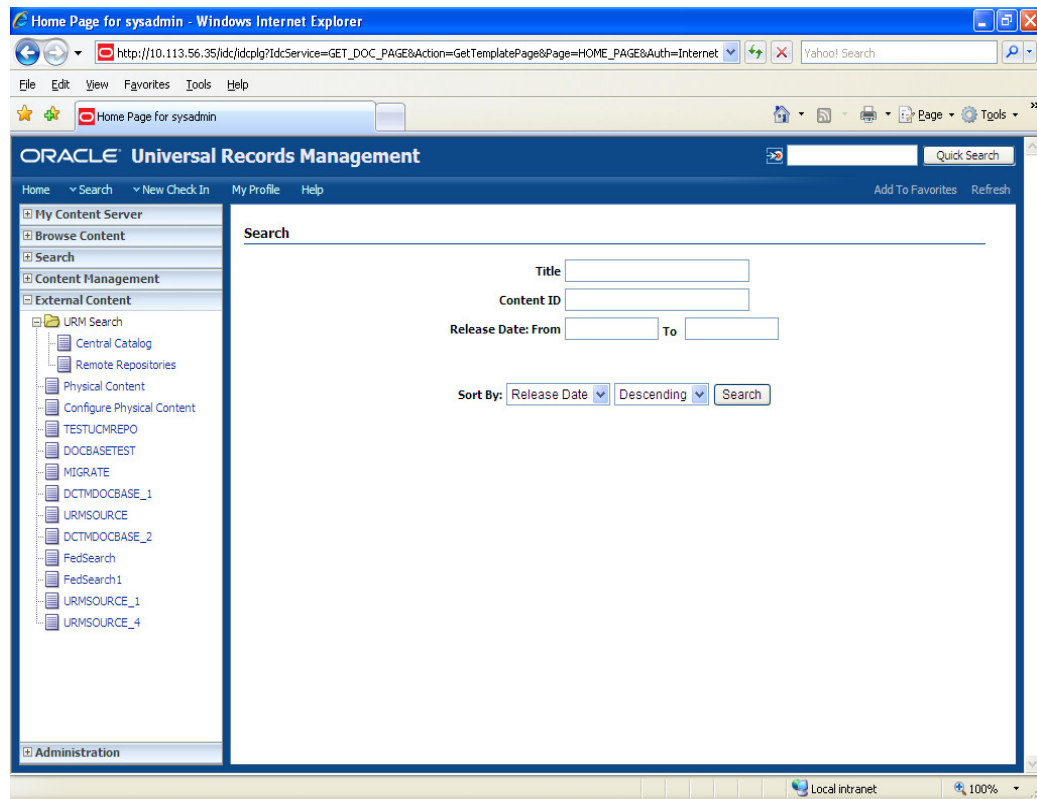


- The search results are shown below.

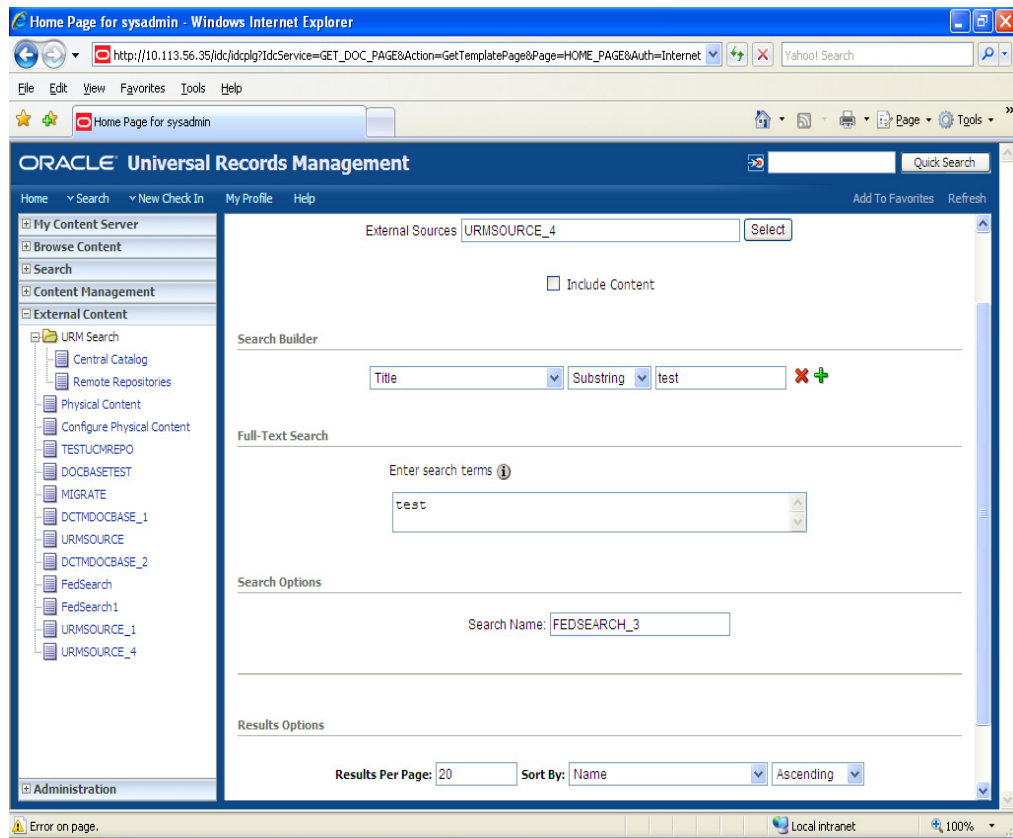
The screenshot shows a Microsoft Internet Explorer window titled "Home Page for sysadmin - Microsoft Internet Explorer". The address bar displays the URL: `http://10.113.56.127/idc/idcplg?IdcService=GET_DOC_PAGE&Action=GetTemplatePage&Page=HOME_PAGE&Auth=Internet`. The page content is the Oracle Content Server interface. On the left is a navigation tree with categories: "My Content Server", "Browse Content", "Search", "Content Management", "External Content", and "Administration". The "Search" category is selected. The main area shows "Search Results for 'URM_TEST' Found 5 potential items". Below this is a table with 5 rows of search results. Each row includes a checkbox for selection, a document ID, title, date, author, and action icons. The status bar at the bottom shows "Query:" and "Internet".

<input type="checkbox"/> Select All	Name	Title	Date	Author	Actions
<input type="checkbox"/>	0900303980006517	Doc7.xls	3/6/08	sysadmin	
<input type="checkbox"/>	0900303980006515	Doc6.doc	3/6/08	sysadmin	
<input type="checkbox"/>	090030398000596A	Doc8.doc	3/4/08	sysadmin	
<input type="checkbox"/>	0900303980005969	Doc7.xls	3/4/08	sysadmin	
<input type="checkbox"/>	0900303980005967	Doc6.doc	3/4/08	sysadmin	

➤ Federated Search



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



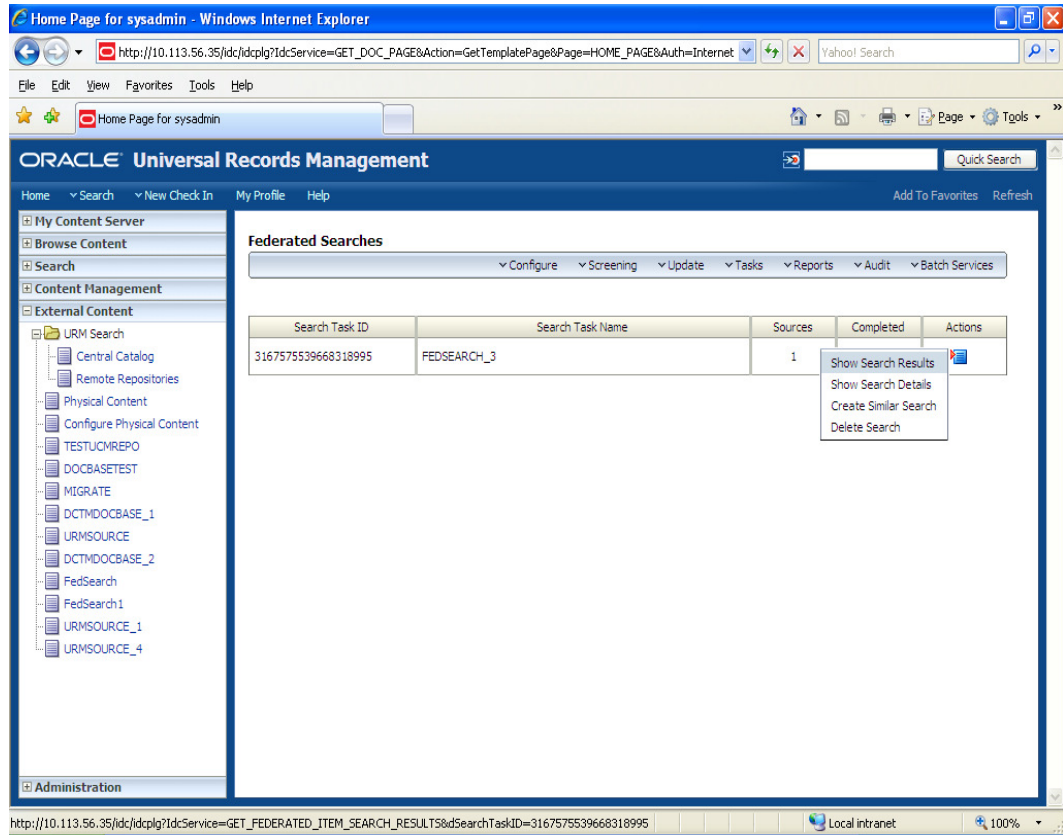
- The search criteria is visible under Federated Search

The screenshot shows the Oracle Universal Records Management (URM) web interface. The browser window is titled "Home Page for sysadmin - Windows Internet Explorer". The URL bar shows a long URL starting with "http://10.113.56.35/". The page has a blue header with the Oracle logo and "Universal Records Management". Below the header is a navigation bar with tabs: Home, Search, New Check In, My Profile, and Help. A "Quick Search" button is on the right. The left sidebar contains a tree view with categories: My Content Server, Browse Content, Search, Content Management, External Content, and Administration. Under "External Content", there is a sub-category "URM Search" which includes links to Central Catalog, Remote Repositories, Physical Content, Configure Physical Content, TESTUCMREPO, DOCBASETEST, MIGRATE, DCTMDOCBASE_1, URMSOURCE, DCTMDOCBASE_2, FedSearch, FedSearch1, URMSOURCE_1, and URMSOURCE_4. The main content area is titled "Federated Searches" and has a sub-navigation bar with tabs: Configure, Screening, Update, Tasks, Reports, Audit, and Batch Services. Below this is a table with the following data:

Search Task ID	Search Task Name	Sources	Completed	Actions
3167575539668318995	FEDSEARCH_3	1	1	



The status bar at the bottom shows "Query:" on the left and "Local intranet" and "100%" on the right.

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



➤ The search results are shown below.

The screenshot shows a web browser window titled "Home Page for sysadmin - Windows Internet Explorer". The address bar displays a URL: `http://10.113.56.35/ldc/ldcplg?ldcService=GET_DOC_PAGE&Action=GetTemplatePage&Page=HOME_PAGE&Auth=Internet`. The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The Oracle Universal Records Management application is displayed, with a left-hand navigation pane containing sections like My Content Server, Browse Content, Search, Content Management, External Content, and Administration. The main content area shows "Search Results for 'URMSOURCE_1'" with a note "Found 1 potential item". Below this, there is a "Freeze" section with a table. The table has columns for Name, Title, Date, Author, and Actions. A single row is visible with the following data:

	Name	Title	Date	Author	Actions
<input type="checkbox"/>	0901e24080005605	TestWordDocument	11/17/09		 

The bottom status bar of the browser shows "Query:" followed by several empty input fields, "Local intranet", and a zoom level of "100%".