

Oracle® Universal Records Management
Oracle Universal Records Manager Adapter for Documentum Installation Guide

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ORACLE

Universal Records Manager Adapter for Documentum Installation Guide,
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1 Installation Overview

1.1 Overview

This section contains the following topics:

- About This Guide
- About Universal Records Manager
- About Documentum Adapter
- Software Requirements
- Optional Hardware

1.2 About the guide

This guide provides instructions on how to install 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.

Important: Before proceeding with the installation, make sure that you read the release note that is shipped with the software. It contains up-to-the-minute installation issues and considerations.

1.2.1 Audience

This guide is intended for system administrators who need to run and configure Documentum 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:

1.3 About Universal Record Manager (URM):

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.

URM allows organizations to manage their records and retention policies, disposition processes, and litigation or audit holds in a central repository known as a URM Server. They can then apply those policies, dispositions, and holds to content stored in multiple repositories through URM adapters. The repositories can be any server or application that holds content whose retention is to be controlled.

1.4 Software Requirements

1.4.1 Supported Databases

The current version of the Adapter supports the following databases:
Oracle Database 10g, Microsoft SQL

1.4.2 Compatibility with URM and Content Server

Currently, the Oracle URM Adapter communicates with Oracle Universal Records Manager 10gR3 (10.1.3.3.2). Currently, this version of URM is supported only on Oracle Content Server versions 10gR3 (10.1.3.3.2) and later.

1.4.3 Optional Hardware Requirements

Installation of URM Adapter requires 1 GB RAM.

1.4.4 Documentum Server

Documentum content server 5.3 should be installed.

2 Installing Oracle URM Adapter for Documentum

2.1 Overview

This document contains the installation detail of the Universal Records Management adapter for providing record and retention management for Documentum.

The Oracle URM Adapter for Documentum obtains all policies from the URM server and applies them to the content items stored in Documentum. The Adapter provides the bridge between URM which manages the retention policies and Documentum stores the content. The Adapter also 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 content, more consistently, with less administrative effort, and less disruption for users.

This document will help administrators at the users end to configure and set up this adapter on the system.

2.2 Pre-Installation Tasks and Considerations

2.2.1 Steps to set the environment for Documentum Adapter

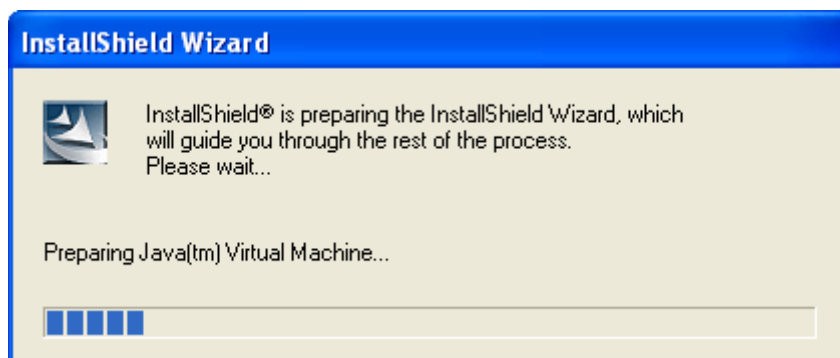
- Install JDK 1.5
- Setup DFC environment (i.e. DFC Client needs to be installed).

2.2.2 Installing the Adapter files

The following are the steps that need to be followed to use the installer for installing the adapter on the user's machine:

For Windows Machine:

- Double click on Documentum Adapter installer to start installation.
- The Install shield wizard dialog box opens as below.



For Linux Machine:

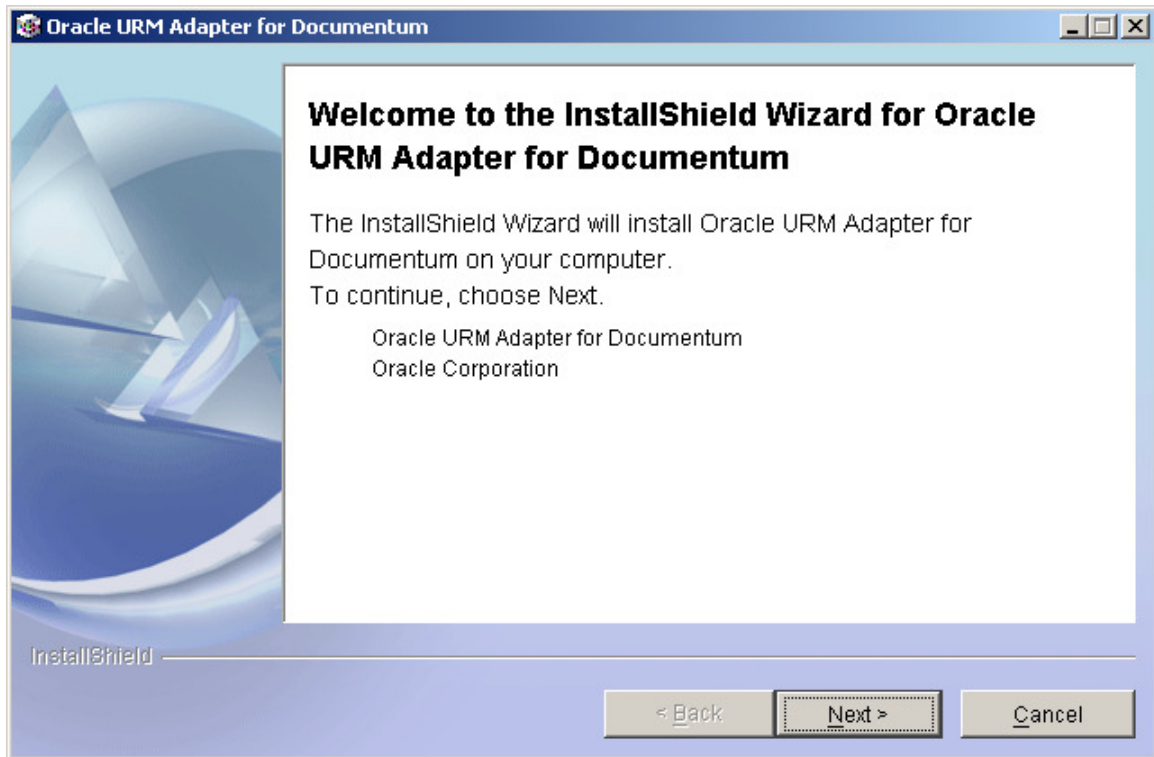
- The provided bin file DocumentumAdapter has to be run. Navigate to the location where the bin file is located.
- Type the following command to run the installer
“ ./<filename>.bin “

E.g.: ./DocumentumAdapter.bin

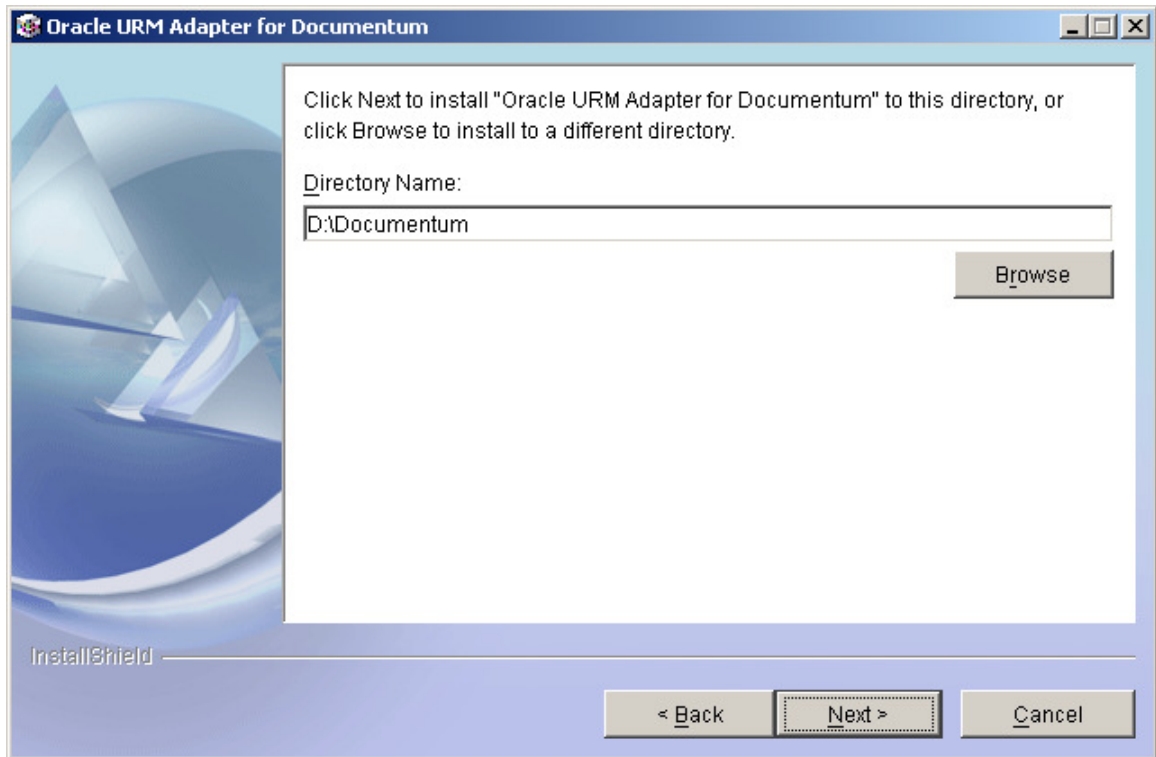


Note: The remaining steps below after the installer starts remain the same for both Windows and Linux machines.

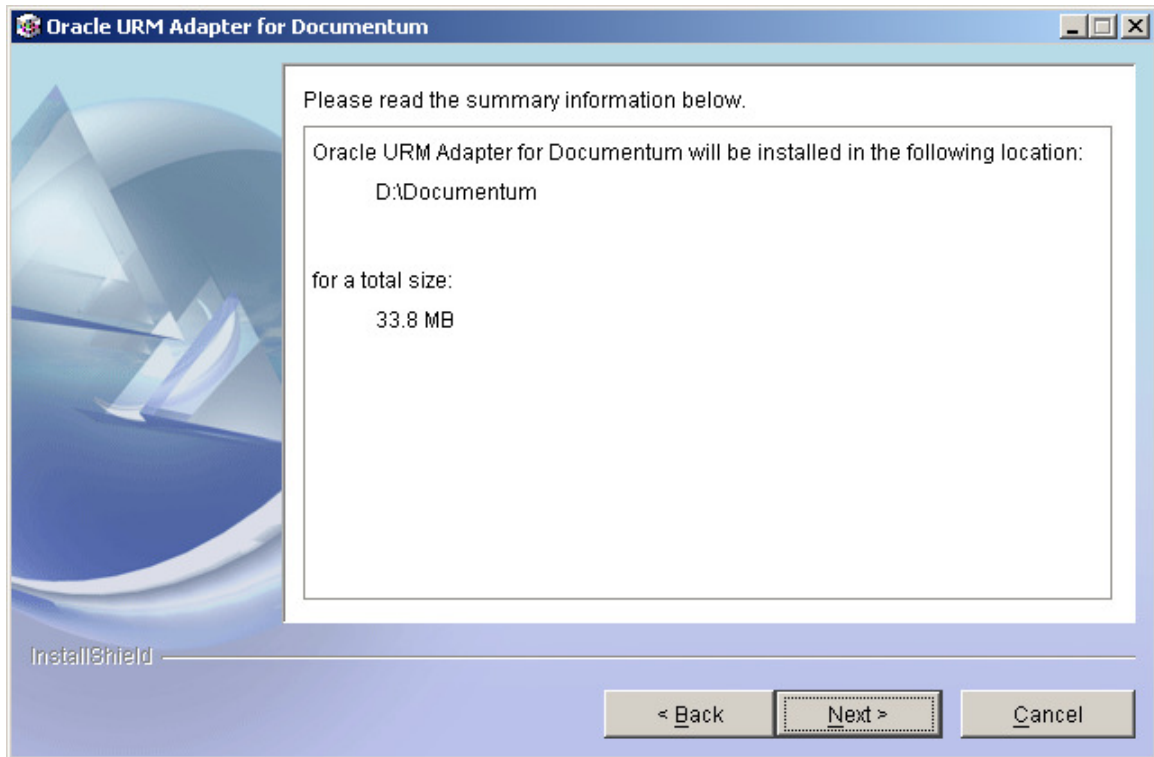
- Click on the “Next” button to start with the installation steps



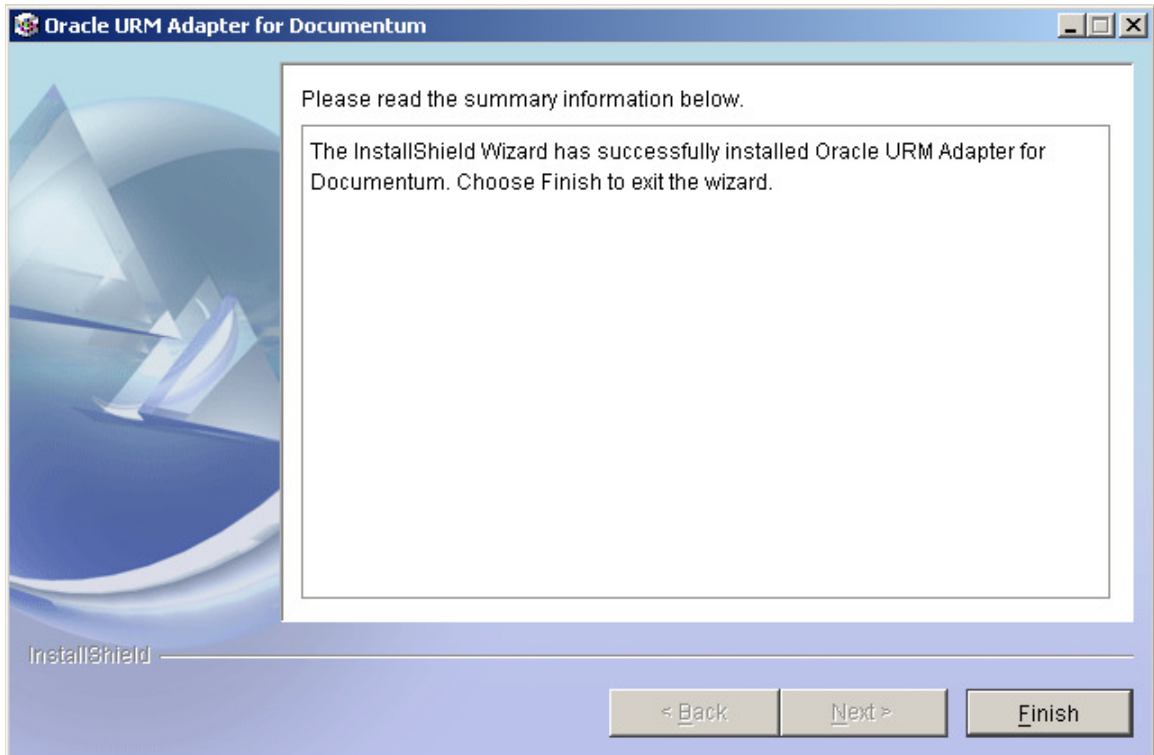
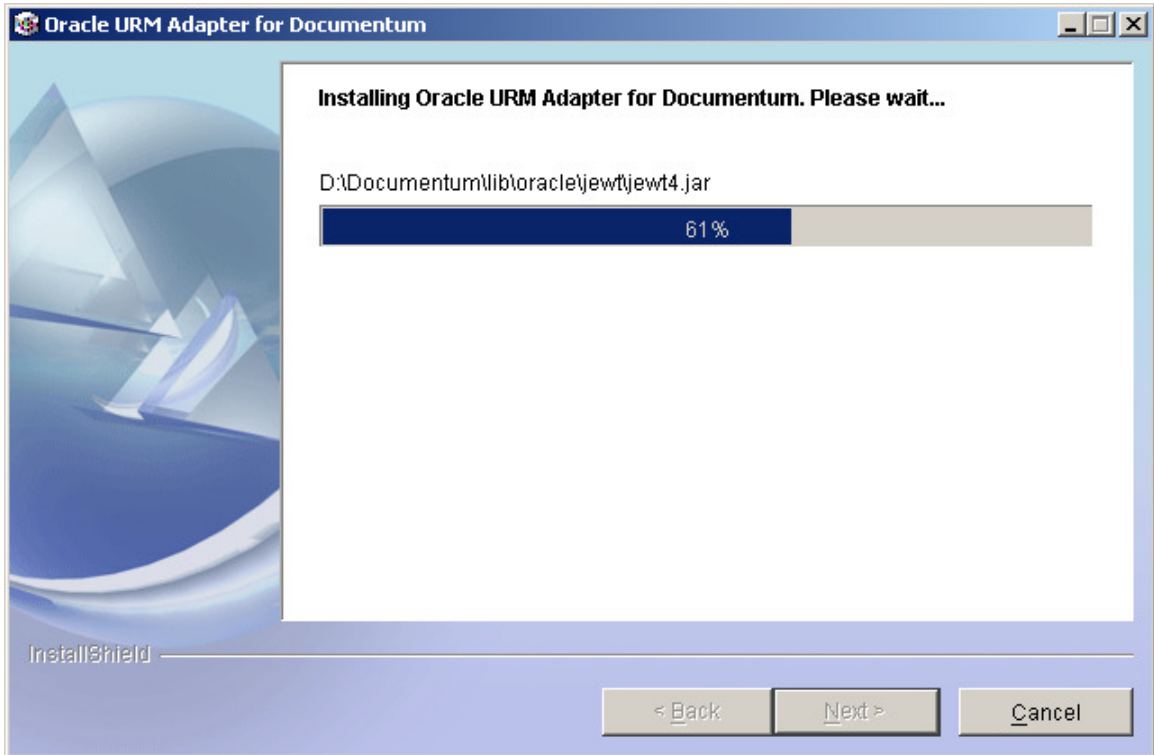
- Browse to the directory where the installer needs to be installed and click Next.



- A summary is provided as shown below. Click Next.



- The dialog box shows the progress as the Adapter is installed.



After clicking the finish button the installer will copy the all the adapter related files in the specified folder.



Note: If you want to uninstall the files from the folder, click the uninstaller.exe in the _uninst folder.

2.3 Post-Installation Tasks and Considerations

2.3.1 Database setup for URM

Execute the Database scripts to create the tables related to URM adapter. Run the following scripts (depending on the database being used is oracle or MSSQL) are:

- **Adapter_Oracle.sql or Adapter_MS.sql**
- **Framework_Oracle.sql or Framework_MS.sql**

These scripts are present in the 'script' folder of the installed directory of Documentum Adapter.



Note: If you are using Oracle database then the user that is going to run the scripts needs to have CREATE TABLE, CREATE SEQUENCE and CREATE TRIGGER permissions on the database.

2.3.2 Setting up Environment Variables

For Windows System

Assuming that the DFC (Documentum Foundation Classes) environment has been set up on the C drive the following needs to be ensured:

- Add Database driver for java :-

Oracle Driver: - ojdbc14.jar in lib/oracle folder inside the installed directory of the Documentum Adapter.

MS SQL Driver: - sqljdbc.jar in lib/microsoft folder inside the installed directory of the Documentum Adapter.

- Add **dfc.jar, dfcbase.jar, bsf.jar and dctm.jar** in the lib/documentum folder inside the installed directory of Documentum Adapter folder. These jars are Documentum specific jars which can be obtained from the folder where DFC client is installed on your local machine (E.g.: C:\Program Files\Documentum).
- Check if the following path has be added to the system variable **PATH**:
"C:\Program Files\Documentum\Shared;"
- Check if the following paths have been added to the system variable **CLASSPATH**:
"C:\Program Files\Documentum\Shared;"
"C:\Program Files\Documentum\dctm.jar;"
"C:\Documentum\config;"
- Now Add a new system variable **DFC_DATA=C:\Documentum;**

For Linux System

Assuming that the DFC (Documentum Foundation Classes) environment has been set in root of the Linux machine and following needs to be ensured.

- Add Database driver for java :-

Oracle Driver: - ojdbc14.jar in lib/oracle folder inside the installed directory of Documentum Adapter.

MS SQL Driver: - sqljdbc.jar in lib/microsoft folder inside the installed directory of Documentum Adapter.

- Add **dfc.jar, dfcbase.jar, bsf.jar and dctm.jar** in the lib/documentum folder inside the installed directory of Documentum Adapter folder. These jars are Documentum specific jars which can be obtained from the folder where DFC client is installed on your local machine (E.g.: /root/documentum_shared).

- Check if the system variable **PATH** has been set to **"/root/documentum_shared"**:
For this type the command **"echo \$ PATH"**.

If the variable has not been set then use the following command:

PATH = \$PATH:/documentum/shared.

- Check if the system variable **CLASSPATH** has been set to:
"root/documentum_shared;"
"root/documentum_shared/dctm.jar;"
"root/documentum_shared/config;"

This Classpath setting needs to be done to set the Documentum path in order to run the adapter successfully.

For this type the command **"echo \$ CLASSPATH"**.

If the variable has not been set then use the following command:

CLASSPATH = \$CLASSPATH:/root/documentum_shared.

CLASSPATH = \$CLASSPATH:/root/documentum_shared/dctm.jar.

CLASSPATH = \$CLASSPATH:/root/documentum_shared/config.



Note: If user is getting problem in locating the dfc.properties please follow the steps

Windows

- Copy the dfc.properties in the Documentum Adapter folder and check the dfc.data.dir property. This should be <drive>:\.<documentum>
e.g. dfc.data.dir=C\./documentum

Linux

- Copy the dfc.properties in the Documentum Adapter folder and check the dfc.data.dir property. This should be ./<dir>/<documentum>
e.g. dfc.data.dir=. /documentum



Note: If user is getting a warning on the command prompt while running the adapter “WARN com.documentum.fc.common.DfLogger - Failed to load log4j.properties. Using default log4j configuration”

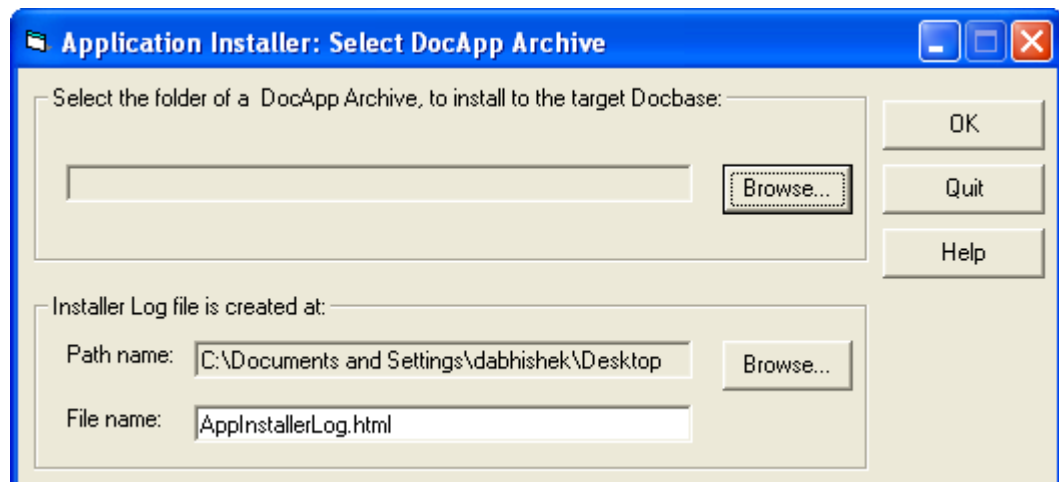
- Copy the log4j.properties file in the installed directory of Documentum Adapter, from the following location:-

In Windows: - <drive>:/Documentum/config

In Linux: - ./<dir>/documentum_shared/config

2.3.3 Enable locking of documents (as Records in URM) in Documentum

- Login to the database (e.g. Oracle/MySQL) for the **Documentum repository** with the required user credentials (i.e. While creating docbase for Documentum, we select/create user credentials for the database to be created for the corresponding docbase. We have to use the same user credentials to create the table for registering records).
- Next run the following SQL script "**Records_Functionality.sql**" in the scripts/Documentum_DB Scripts folder.
 - **records_functionality_MS.sql or records_functionality_oracle.sql**
- Install the docapp **TBO_URM_Record** (provided with the adapter) using Documentum Application Installer (DAI) in the following way:
 - Open DAI by navigating through the following:
 - "Start> Programs > Documentum > Application Installer"
 - Login to the required docbase with the correct user credentials.
 - Navigate to the location where the docapp is located by clicking on the "browse" button at top as illustrated below.



- Click the "OK" button
- Click on the "Start Install" button to start installation.
- Click the "Quit" button after successful installation.
- Next run the DQL script in the following manner:
 - Copy the attached idq|32.exe and the urmStatusDQL.dql script file to the same location at any machine which has DFC installed in it (URM Adapter machine).

- Open a command prompt and navigate to the location where the idql32.exe has been saved.
- Run the following command.
idql32 "<docbasename>" -U"<user name>" -P"<password>" -R"<dql script file name>"
E.g.: idql32 "URM" -U"dmadmin" -P"Hello#123" -R"urmStatusDQL.dql"
- Successful execution will be shown in the command prompt window as below.

```

C:\WINDOWS\system32\cmd.exe
C:\Dctm>idql32 "URM" -U"dmadmin" -P"Hello#123" -R"urmStatusDQL.dql"

Documentum idql - Interactive document query interface
(c) Copyright Documentum, Inc., 1992 - 2004
All rights reserved.
Client Library Release 5.3.0.413 SP4 Win32

Connecting to Server using dochase URM
IDM_SESSION_I_SESSION_STARTInfo: "Session 01003039800065d3 started for user dm
admin."

Connected to Documentum Server running Release 5.3.0.413 SP4 Win32.Oracle
1> 2> new_object_ID
-----
19003039800070a9
<1 row affected>
1> 2> objects_updated
-----
1
<1 row affected>
IDM_QUERY_I_NUM_UPDATEInfo: "1 objects were affected by your UPDATE statement.
"
1>
C:\Dctm>

```

Alternate Approach:-

User can achieve the functionality by following the steps below:

- Login in to Documentum Administrator with super-user login credentials.
- Open DQL executor and register the URM_STATUS table using the following DQL:
"REGISTER TABLE dm_dbo.URM_STATUS (r_object_id CHAR (16),ISRECORD CHAR(1),ISFROZEN CHAR(1))";
- Update the access to the registered table using the following DQL:
"UPDATE dm_registered object set world_table_permit= 15 where object_name='URM_STATUS'".

2.3.4 Enable removal of documents from URM

These are the steps to enable Audit trail for document delete event to keep a log entry for very document that is deleted from the Documentum (DCTM) repository:

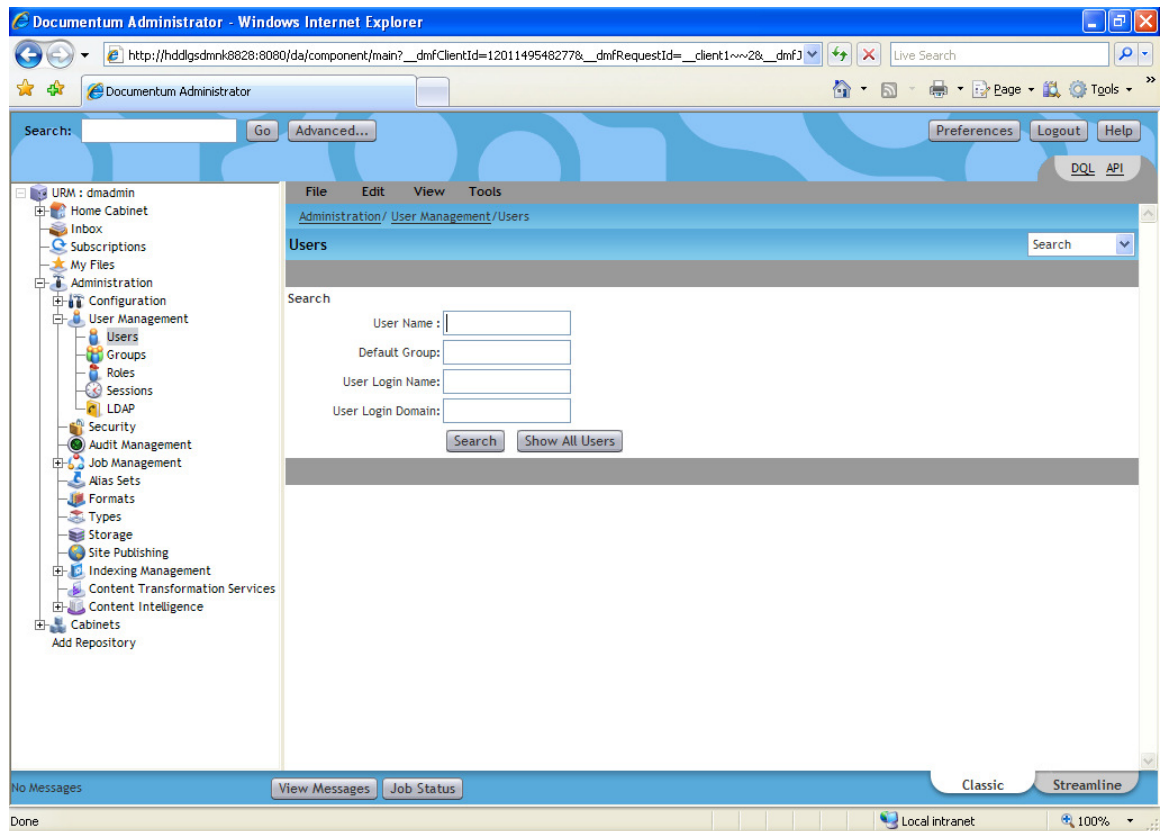
Enabling audit trail for a particular event requires these two procedures to be carried out:

- A. Give a user the auditing powers to register events to audit.
- B. Enable an event to be recorded in the audit trail.

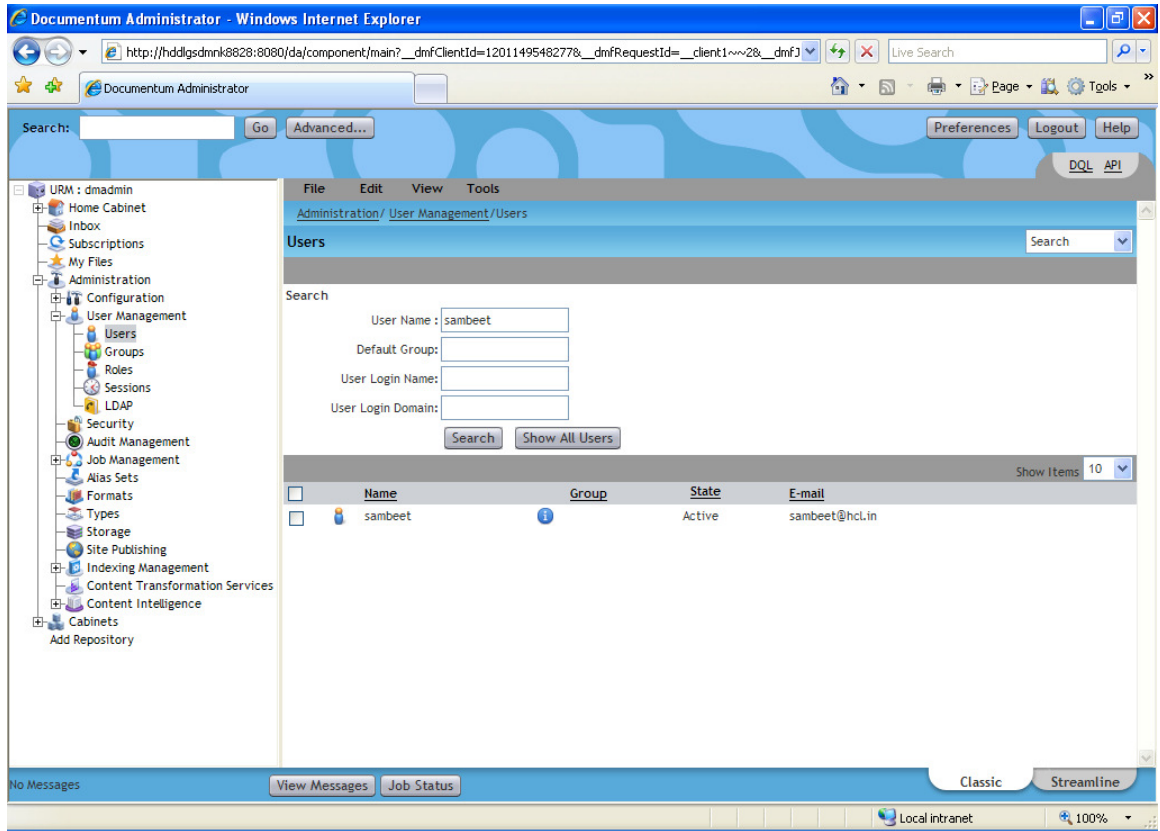
Giving a user the auditing powers to register events to be audited

Steps to enable the auditing powers for a user are as follows:

- Login to Documentum Administrator with super user credentials.
- Navigate to the Users Management > Users option through the browser tree on the left side as illustrated below.

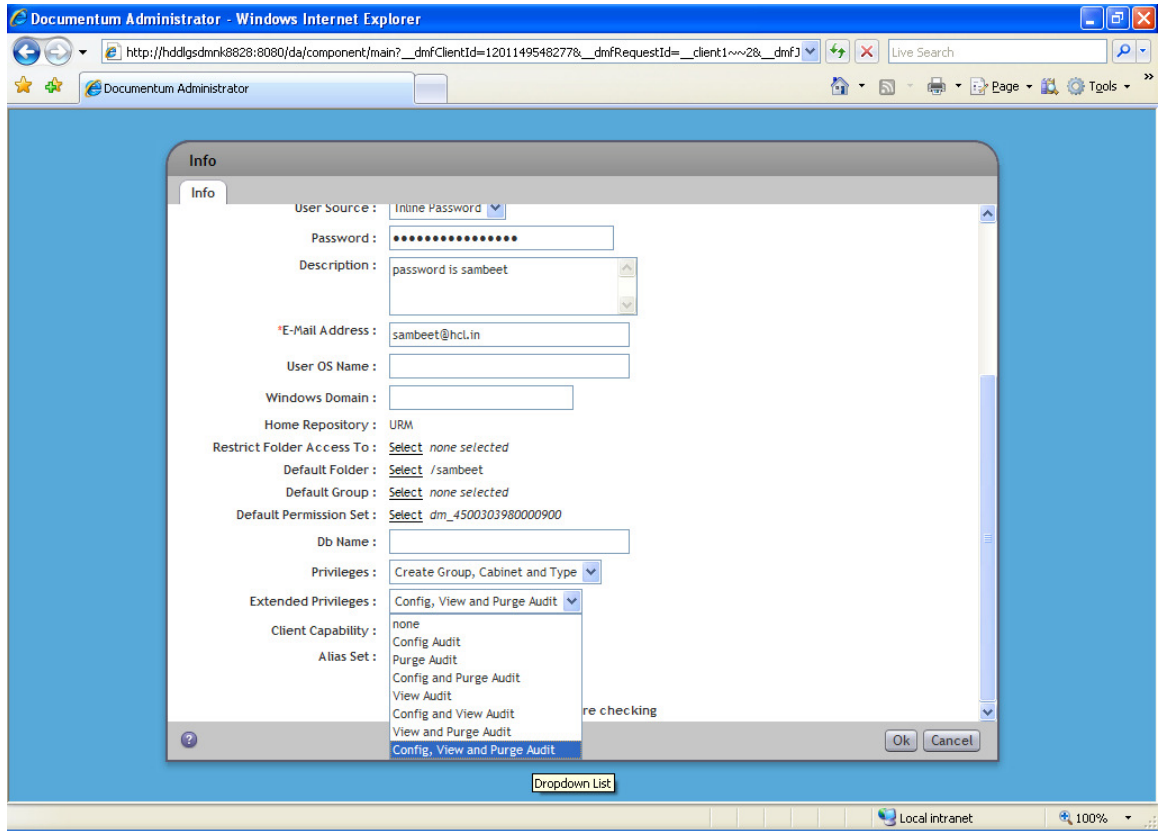


- Type the user name in User Name box to search for the user to whom auditing powers will be given as illustrated below.



- Click on the info icon for the user to change its attributes.

- Scroll through the properties page and change the “extended privileges” to “Config, View and Purge audit” as illustrated below.



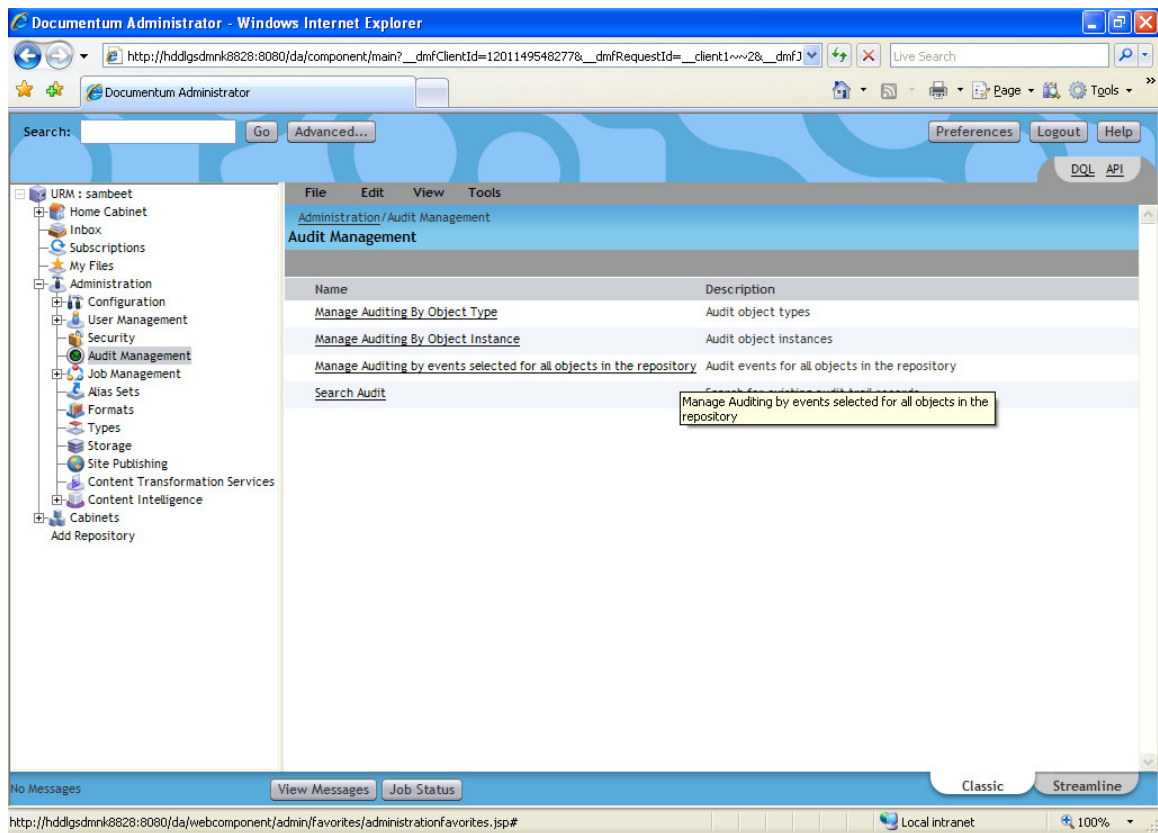
- Click 'OK' to complete the process.

Enabling an event to be recorded in Audit trail

These are the steps to enable the Audit trail for a document delete event to keep a log entry for every document that is deleted from the Documentum (DCTM) repository:

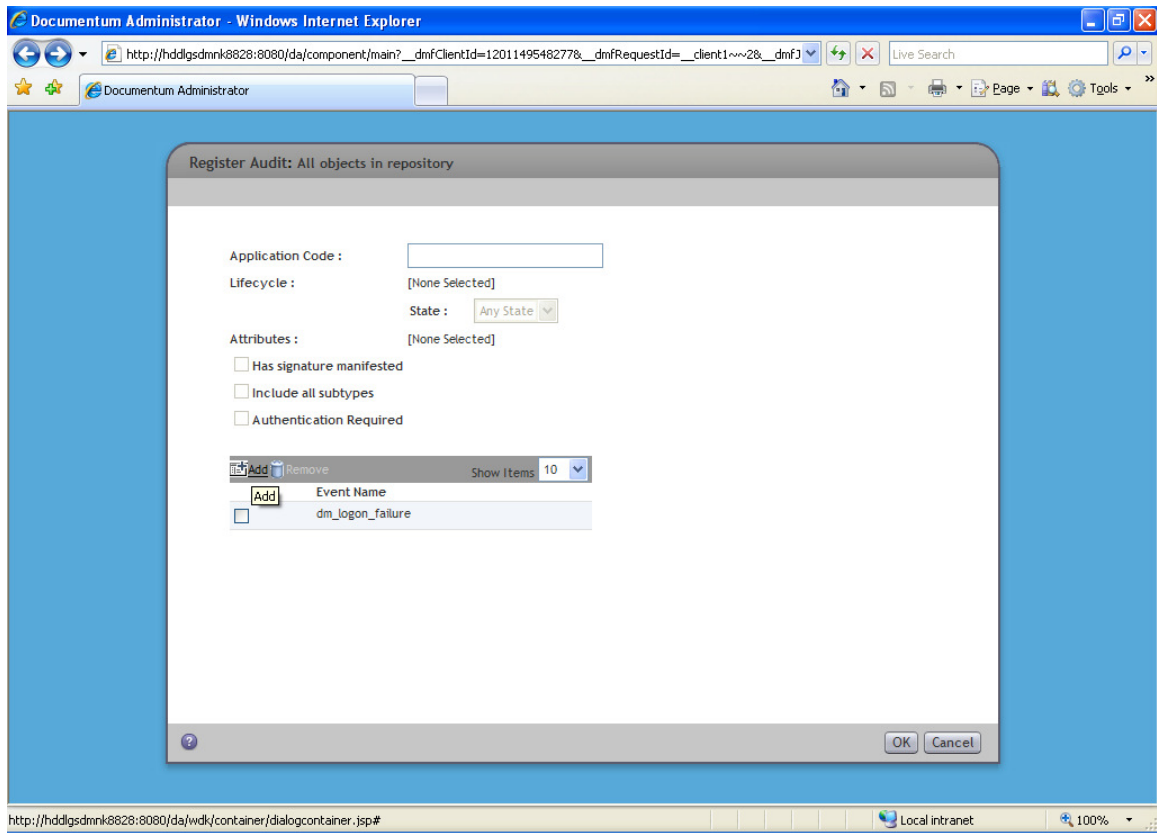
- Login to Documentum Administrator with the auditor’s user credentials

- Navigate to the “Audit Management” through the browser tree in the left hand side as illustrated below.

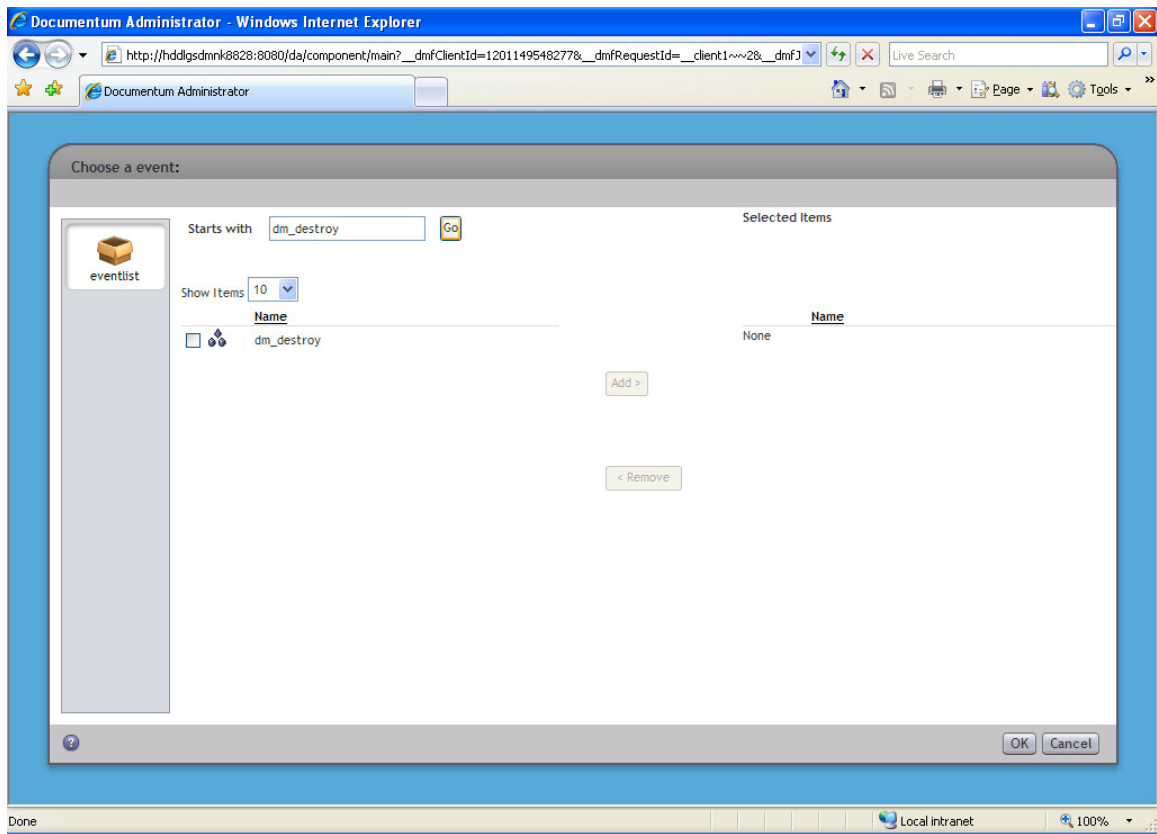


- Click the “Managing Auditing by events selected for all objects in the repository”

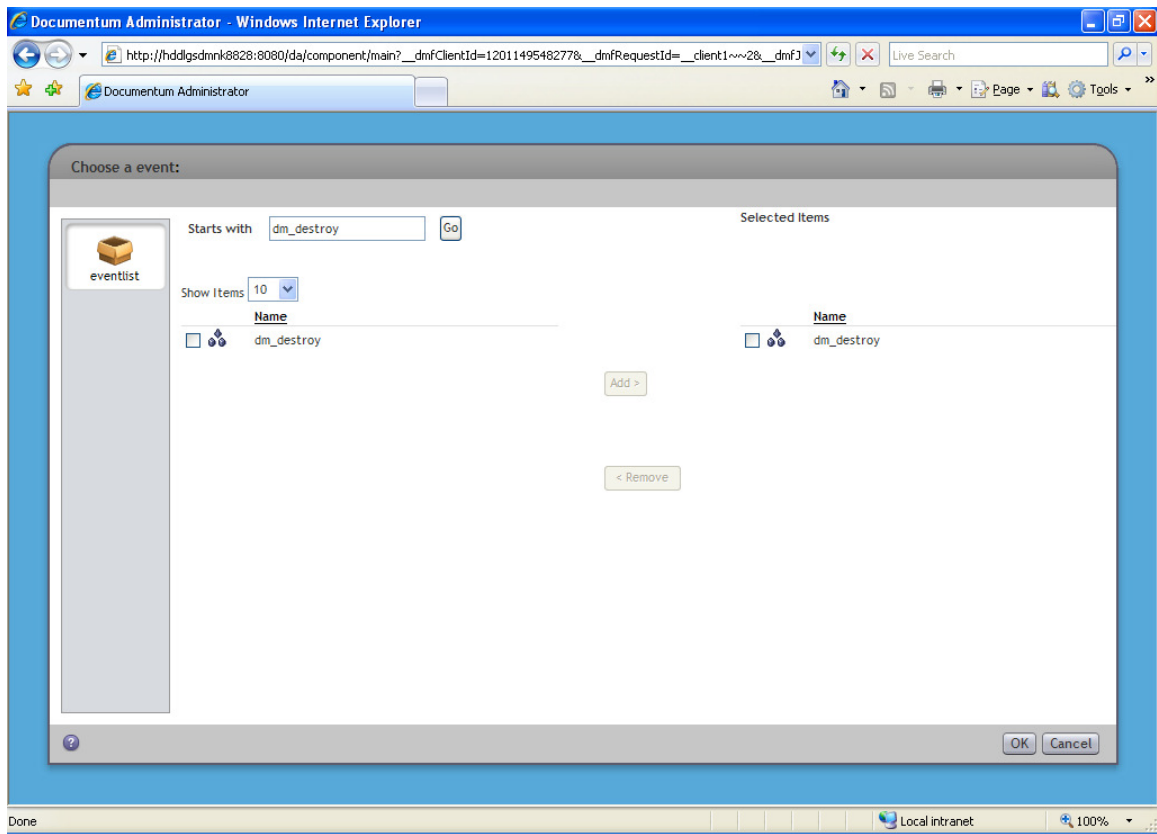
- Click the “Add” option to add an event as illustrated below.



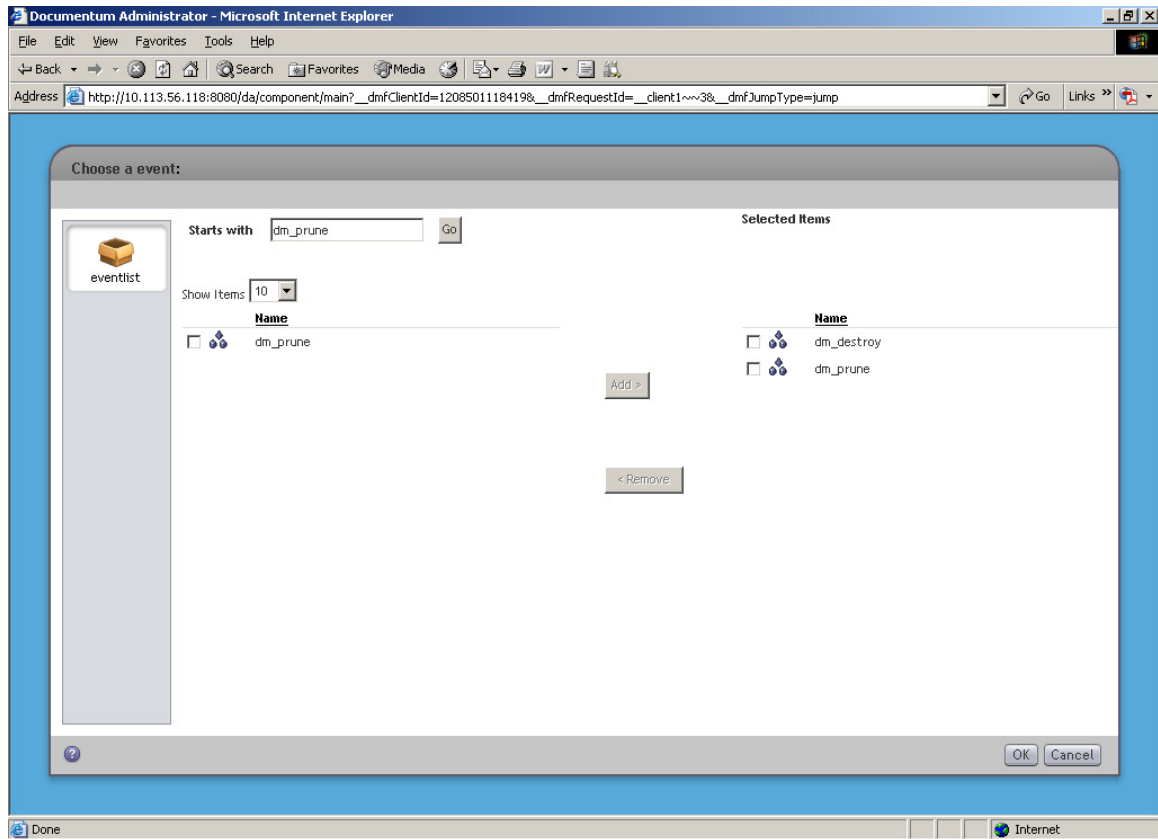
- Type the event name “dm_destroy” in the “Starts with” box and click the “Go” button to search the required event as illustrated below.



- Select the checkbox for “dm_destroy” event and click the “Add” button to add the event as illustrated below.

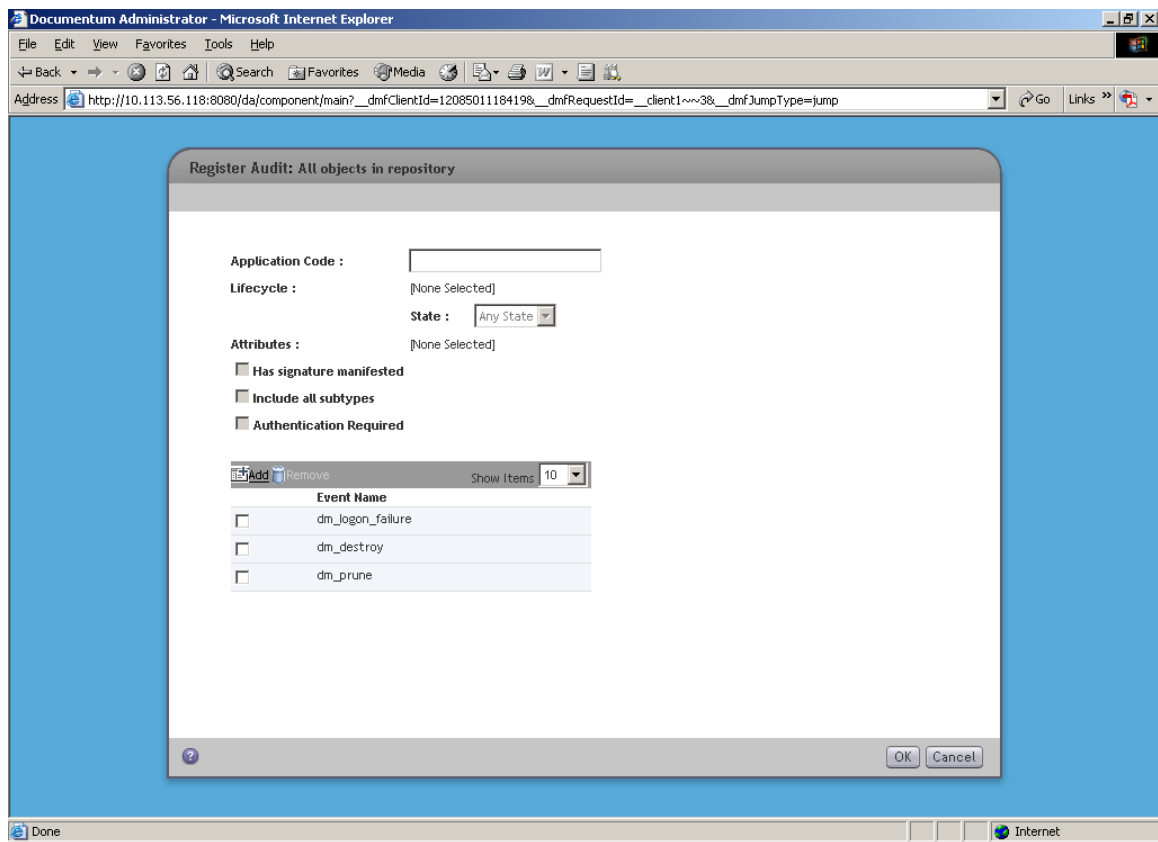


- Type the event name “dm_prune” in the “Starts with” box and click the “Go” button to search the required event.
- Select the checkbox for “dm_prune” event and click the “Add” button to add the event as illustrated below.



- In the Selected Items “dm_destroy” and “dm_prune” will appear.
- Click the “OK” button.

- The event registered should appear on the list. Click the “OK” button to complete the operation as illustrated below.



- Every delete operation which is conducted post registration of the event will be recorded in to audit trail.

For running the adapter, please refer to **Administration guide** for Oracle URM Adapter for Documentum.