

Collaboration Manager Installation Guide
10g Release 3 (10.1.3.3.1)

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Collaboration Manager Installation Guide, 10g Release 3 (10.1.3.3.1)
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ABOUT COLLABORATION MANAGER

OVERVIEW

This section covers the following topics:

- ❖ [Product Overview](#) (page 1-1)
- ❖ [About This Guide](#) (page 1-2)

PRODUCT OVERVIEW

The Oracle family of products provides a robust and scalable content management solution that enables organizations to design, publish, and maintain web sites for the internal and external control and distribution of content. Oracle enables rapid deployment of content-driven applications, supplying web sites and other applications with consistent, managed, and up-to-date content. It can automatically convert business content from enterprise sources—including desktop applications, business applications, and templates—to web formats such as HTML, XML, WML, cHTML, and PDF.

Every content contributor has the ability to automatically publish content to web sites from native desktop applications or templates, without compromising on corporate standards for control and manageability. Collaboration Manager automates web content management to ensure content is always current and accurate, and frees webmasters from routine coding and updating. Personalization and integration with corporate security models ensure that users access only the information they need.

ABOUT THIS GUIDE

This installation guide provides all information required to install Collaboration Manager version 10gR3.





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 of the Collaboration Manager software, make sure that you carefully read the release note that is shipped with the Collaboration Manager software. It contains up-to-the-minute installation issues and considerations.

Conventions

- ❖ The notation `<install_dir>/` is used to refer to the location on your system where Content Server is installed.
- ❖ Forward slashes (/) are used to separate the directory levels in a path name. This is true when referring to files on a Windows file system or on a UNIX system. A forward slash will always appear after the end of a directory name.
- ❖ Notes, technical tips, important notices, and cautions use these conventions:

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.

INSTALLATION OVERVIEW

OVERVIEW

This section covers the following topics:

- ❖ [Hardware and Software Requirements](#) (page 2-1)
- ❖ [Basic Installation Procedure](#) (page 2-3)

HARDWARE AND SOFTWARE REQUIREMENTS

For successful installation of Collaboration Manager 10g Release 3 (10.1.3.3.1), current versions of the following components are required:

- ❖ Collaboration Manager
- ❖ Content Server [Update Patch](#) (specific to Content Server version)
- ❖ Folders

Additionally, the following optional component adds collaborative functionality to Content Server, and if enabled, requires the latest version:

- ❖ Threaded Discussions

Collaboration Manager 10g Release 3 (10.1.3.3.1) is designed to work with Content Server 10g Release 3 (10.1.3.3.1), as well as with previous Content Server versions 7.5.2 and 7.5.1. Each Content Server version must also have the appropriate update component installed:

Content Server Version	Required Update Component
10g Release 3 (10.1.3.3.1)	10gR3V1Update
7.5.2	CS752Update
7.5.1	751Update

The update components contain necessary updates to Content Server and are available for download from [MetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>), the Oracle support site. Please see the documentation shipped with Content Server for current Content Server hardware and software requirements. Requirements for Collaboration Manager are the same as for Content Server, with the following exceptions:

- ❖ Collaboration Manager does not support the Classic view. Either the Trays or Top Menus view must be used in the Content Server client user profile.
- ❖ The current version of the Folders component is required for Collaboration Manager 10gR3. The current version of the Folders component is shipped as an extra with Content Server 10gR3, and is also available for download from [MetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>), the Oracle support site.
- ❖ If enabling discussions, the current version of the Threaded Discussions component is required for Collaboration Manager 10gR3. The current version of the Threaded Discussions component is shipped as an extra with Content Server 10gR3, and is also available for download from [MetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>), the Oracle support site.
- ❖ This version of Collaboration Manager does not support Records Manager or Governance, Risk, and Compliance Manager.
- ❖ The Folders and Threaded Discussions components must be installed before the Collaboration Manager component. If the Collaboration Manager component is installed first, Collaboration Manager may not function correctly.

If you disable either the Folders or Threaded Discussions components for any reason, you must disable the Collaboration Manager, re-enable the Folders or Threaded Discussions components, and then re-enable the Collaboration Manager.

- ❖ Collaboration Manager 10gR3 supports the following add-on products:
 - Inbound Refinery
 - PDF Converter

- Dynamic Converter
- Desktop Outlook Integration
- Desktop WebDAV Client

Other add-on products require Consulting Services to customize the user interface.

BASIC INSTALLATION PROCEDURE

To install Collaboration Manager, follow these basic steps:



Important: The order in which the required components are installed affects the success of the installation. Please install components in the order listed.

1. Install Content Server.
2. Install the Folders component (and WebDAV component, if applicable).
3. Install the Threaded Discussions component.
4. Restart Content Server.
5. Install Collaboration Manager.
6. Verify the installation.

See [Installing Collaboration Manager](#) (page 3-1) for detailed instructions.

CONTENT SERVER CHANGES DURING INSTALLATION

Several changes are made to Content Server during installation of Collaboration Manager.

Configuration File Changes

The following changes are made to the config.cfg file located in the `<install_dir>/<instance_dir>/config/` directory:

- ❖ Adds *MemoFieldSize* (based on *cmMemoFieldSize*, default is 1000)
- ❖ Adds *ZonedSecurityFields=xClbraUserList,xClbraAliasList* (if *cmZonedSecurityFields* is true)
- ❖ Adds *UseCollaboration=true*
- ❖ Adds *Projects* to *SpecialAuthGroups* section
- ❖ Adds *UseCollaboration=true*

Additional Metadata Fields

The following metadata fields are added to Content Server:

- ❖ Adds *Announcement* field
- ❖ Adds *DiscussionType* field (if not already present)
- ❖ Adds *Alert* field
- ❖ Adds *AlertText* field
- ❖ Adds *SelectedWorkflow* field (taken from *prjWizardWorkflowField*, default is *SelectedWorkflow*)
- ❖ Adds *RoutingToken1*, *RoutingToken2*, and *RoutingToken3* fields for workflow tokens (taken from *prjWizardTokens*)
- ❖ Adds *ClbraUserList*
- ❖ Adds *ClbraAliasList*
- ❖ Adds Internal and External to the user type list

Additional Security

- ❖ Adds a *Projects* security group

Other Changes

- ❖ Adds Company information to the users information table
- ❖ Adds Phone information to the users information table
- ❖ Adds a new Type for discussions (taken from *cmDiscussDocType*, default is *DISCUSS*)
- ❖ Adds *Folder* to *DiscussionType* field option list values
- ❖ Adds a Project subscription
- ❖ Adds a Folder subscription
- ❖ Adds a *Projects* folder (root mark is PROJECTS ROOT)
- ❖ Adds a *Users* folder (root mark is USERS ROOT)
- ❖ Adds sample workflows (*SingleReviewer*, *TwoEditors*, and *TwoEditorsOneReviewer*)

Chapter
3

INSTALLING COLLABORATION MANAGER

OVERVIEW

The installation procedure for the Collaboration Manager software depends on the type of content server that is installed:

- ❖ [Installing a New Collaboration Manager](#) (page 3-1)
- ❖ [Installing Collaboration Manager on a Proxied Content Server](#) (page 3-9)
- ❖ [Optional Setup](#) (page 3-11)



Note: During installation, there is a short delay when installing components using the Component Wizard. The delay is a normal part of the installation process.

INSTALLING A NEW COLLABORATION MANAGER

The installation procedure for the Collaboration Manager software consists of the following main steps:

1. Install Content Server. See [Installing Content Server](#) (page 3-2).
2. If using Collaboration Manager with an IBM DB2 database, you must create additional table space. DB2 has a default page size of 4K, while Collaboration Manager requires a 32K page size. See [Setting Up a DB2 Database](#) (page 3-2).



Note: Both the Threaded Discussions component and the Folders component must be installed prior to installing Collaboration Manager. Either Threaded Discussions or Folders may be installed first.

3. Install the Folders component. See [Installing the Folders Component](#) (page 3-4).
4. Install the Threaded Discussions component. See [Installing the Threaded Discussions Component](#) (page 3-5).
5. Restart the Content Server. This must be done prior to installing the Collaboration Manager component.
6. Install the Collaboration Manager component. See [Installing the Collaboration Manager Component](#) (page 3-6).
7. Restart the Content Server.
8. Verify the installation. See [Verifying the Installation](#) (page 3-9).
9. If desired, perform optional setup tasks. See [Optional Setup](#) (page 3-11).



Note: The most current versions of the Folders and Threaded Discussions components and the Collaboration Manager are available on the Oracle media distribution site and can be downloaded with proper authentication. Folders and Threaded Discussions are included as samples and extras with the Content Server 10gR3 release.

Installing Content Server

To install Content Server, follow the instructions in the *Content Server Installation Guide* for the appropriate operating system.

See [Hardware and Software Requirements](#) (page 2-1) for requirements and limitations.

Setting Up a DB2 Database

DB2 has a default page size of 4K, while Collaboration Manager requires a 32K page size. If you are using DB2 for the content server database, you will need to create additional tablespace that can handle a 32K page size.

To create additional tablespace for the DB2 database:

1. In the DB2 command line processor, create a BufferPool that has a 32K page size:

```
CONNECT TO <db_name> USER <user_name> USING <password>  
CREATE BUFFERPOOL WIDE SIZE 250 PAGESIZE 32k
```

```
DISCONNECT <db_name>
```

2. Reload the Oracle database to activate the newly created BufferPool:

- If the Oracle database is the only database in the DB2 instance, use the following commands to reload the database:

```
FORCE APPLICATION ALL
DEACTIVATE DATABASE <db_name>
ACTIVATE DATABASE <db_name>
```

- If there is more than one database in the DB2 instance:
 - a. Find the applications that are connected to the Oracle database using the following command:

```
LIST APPLICATIONS FOR DATABASE <db_name>
```

- b. Close each application connection using the following command:

```
FORCE APPLICATION <application-handle>
```

- c. Reload the database using the following commands:

```
DEACTIVATE DATABASE <db_name>
ACTIVATE DATABASE <db_name>
```



Note: If any of the FORCE, DEACTIVATE, or ACTIVATE commands doesn't return DB20000I, finish all three commands and then run them again.

3. Create the tablespace and temporary tablespace using the following commands:

```
CONNECT TO <db_name> USER <user_name> USING <password>
CREATE TABLESPACE WIDE_TBSP PAGESIZE 32K MANAGED BY SYSTEM USING
('<absolute_directory_path_for_this_tablespace>') BufferPool WIDE
CREATE TEMPORARY TABLESPACE TEMP_WIDE_TBSP PAGESIZE 32K MANAGED BY SYSTEM
USING ('<absolute_directory_path_for_this_temp_tablespace>') BufferPool WIDE
DISCONNECT <db_name>
```



Note: Make sure that the <user_name> and <password> match Oracle's *JdbcUser* and *JdbcPassword* configuration entries. If they do not match, you will need to grant rights to Oracle's *JdbcUser* on these newly created tablespaces.

4. Make sure there are no tables in the default tablespace.



Important: If tables exist, you should migrate data before dropping the default tablespace. Otherwise, you could lose data when performing the next step.

5. Use the following commands to drop the default tablespace:

```
CONNECT TO <db_name> USER <user_name> USING <password>
DROP TABLESPACE USERSPACE1
DISCONNECT <db_name>
```

Installing the Folders Component

To install the Folders component on the content server:



Important: The Folders component is a stand-alone component that can be used without Collaboration Manager, so it has a separate installation program with a number of optional settings. However, you must select the settings recommended in this procedure for the Collaboration Manager to work properly. See the *Installation and Configuration—Installing the Folders Component—Installation Procedure* section of the *Folders and WebDAV Guide* for more information.



Important: The current version of the Folders component is required for Collaboration Manager 10gR3. The current version of the Folders component is shipped as an extra with Content Server 10gR3, and is available for download from [MetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>), the Oracle support site.

1. If you have previously installed WebDAV support using Oracle's integrated Tomcat servlet engine, see the *Installation and Configuration—Installing the Folders Component—WebDAV Upgrade Procedure* section of the *Folders and WebDAV Guide* to upgrade to the version 7.0 WebDAV component (which does not require a servlet engine).
2. If you will be installing the WebDAV component, stop the web server. (For more information on WebDAV, see the *Folders and WebDAV Guide*).
3. Install the component using either Component Manager or the Component Wizard.

To install the component using the Component Wizard:

- a. Start the Component Wizard by selecting Start—Programs—Content Server—*<instance>*—Utilities—Component Wizard. The Component Wizard main screen and the Component List screen are displayed.
- b. On the Component List screen, click **Install**. The Install screen displays.
- c. Click **Select**. Navigate to the Folders zip file and select it.
- d. Click **Open**. The zip file contents are added to the Install screen list.
- e. Click **OK**. The Edit Preferences Prompt screen displays.

4. Enter the appropriate information in the fields listed on the Edit Preferences Prompt screen. The default values are provided.

For more detailed information about the preferences and suitable values, refer to the Oracle Folders and WebDAV Guide.

5. When the preference field values are complete, click **OK**.
6. The Component Wizard asks if you want to enable the Folders component. Click **Yes**. The Folders, WebDAV, and WebDAVClientHelper70 components are listed as enabled on the Component List screen.
7. If you plan to immediately install the Threaded Discussions component, proceed to [Installing the Threaded Discussions Component](#) (page 3-5).



Note: Although the Threaded Discussions component can be installed before the Folders component, the Threaded Discussions component must be installed before the Collaboration Manager component.

8. Otherwise, close the Component Wizard.
9. Restart the Content Server to apply the updated installation parameters.



Important: The Folders component must be loaded before the Collaboration Manager. If the Collaboration Manager is loaded first, project notifications and the Active Workflows pane on the Dashboard may not function correctly.

Installing the Threaded Discussions Component

If enabling discussions, the current version of the Threaded Discussions component is required for Collaboration Manager 10gR3. The current version of the Threaded Discussions component is shipped as an extra with Content Server 10gR3, and is also available for download from [MetaLink](http://metalink.oracle.com) (<http://metalink.oracle.com>), the Oracle support site.

To install the Threaded Discussions component on the content server:

1. Install the component using either Component Manager or the Component Wizard.

To install the component using the Component Wizard:

- a. Start the Component Wizard by selecting Start—Programs—Content Server—*<instance>*—Utilities—Component Wizard. The Component Wizard main screen and the Component List screen are displayed.
- b. On the Component List screen, click **Install**. The Install screen displays.

- c. Click **Select**. Navigate to the Threaded Discussions zip file and select it.
 - d. Click **Open**. The zip file contents are added to the Install screen list.
 - e. Click **OK**.
2. The Component Wizard asks if you want to enable the Threaded Discussions component. Click **Yes**.

The Threaded Discussions component is listed as enabled on the Component List screen.

3. Restart the Content Server to apply the updated installation parameters.



Important: The Threaded Discussions component must be installed before the Collaboration Manager component. The Threaded Discussions component sets up a discussion type with an option list and additional options are added to this list when the Collaboration Manager is installed. If the Collaboration Manager is installed first, these additional discussion options may be removed from the list when the Threaded Discussions component is installed.

4. If you plan to immediately install the Collaboration Manager, proceed to [Installing the Collaboration Manager Component](#) (page 3-6), otherwise, close the Component Wizard.

Installing the Collaboration Manager Component

To install Collaboration Manager on the content server:

1. Install Collaboration Manager using either Component Manager or the Component Wizard.

To install the component using the Component Wizard:

- a. Start the Component Wizard by selecting Start—Programs—Content Server—<instance>—Utilities—Component Wizard. The Component Wizard main screen and the Component List screen are displayed.
 - b. On the Component List screen, click **Install**. The Install screen displays.
 - c. Click **Select**. Navigate to the Collaboration Manager zip file and select it.
 - d. Click **Open**. The zip file contents are added to the Install screen list.
 - e. Click **OK**. The Edit Preferences Prompt screen displays.
2. Enter the content type to identify discussion documents.

- ❖ Recommended: Accept the default (DISCUSS).
 - ❖ Optional: If your instance already has a DISCUSS document type, enter a new document type.
3. Choose whether you want users to be able to route documents for review.
- ❖ Recommended: Accept the default (disabled).
 - ❖ Optional: Enable the selection. When workflow routing is enabled, the Task Manager component is automatically installed. Clicking the Configure button next to the Selected Workflow metadata field on the Content Check In Form (Project) screen will launch the Configure Workflow Wizard.
- If workflow routing is not enabled, the user receives a message indicating that the Task Wizard is required.
4. Enter the metadata field name for stored selected workflows. See [Workflow Metadata Field](#) (page A-6).
- ❖ Recommended: Accept the default (SelectedWorkflow).
 - ❖ Optional: Enter a new name.
5. Enter the names to use for workflow tokens and metadata fields. See [Workflow Tokens](#) (page A-6) and [Token Metadata Fields](#) (page A-7).
- ❖ Recommended: Accept the default names (RoutingTokenX where X=1 to 3).
 - ❖ Optional: Enter new names.
6. Choose whether you want to activate the Select User applet. See the *Projects Administration* chapter in the *Collaboration Manager System Administration Guide* for more detailed information. Note that if you are using Apple Macintosh systems, the Select User applet is not displayed even if this option is enabled. In its place, a popup application is used which has similar functionality.
- ❖ Recommended: Accept the default (enabled).
 - ❖ Optional: Disable the selection.
7. Enter the letter that specifies the display and sort order for the user and group columns in the Select User applet. See the *Projects Administration* chapter in the *Collaboration Manager System Administration Guide* for more detailed information.
- ❖ Recommended: Accept the default (a).
 - ❖ Optional: Enter a different letter option.
8. Choose whether you want to enable zoned security fields for searches. If Verity indexing is used, the collection must be rebuilt if zoned security is enabled.

- ❖ Recommended: Accept the default (enabled).
 - ❖ Optional: Disable the selection.
9. Choose whether you want to allow mixed case entries for database queries or to force entries to lower case. See the *Projects Administration* chapter in the *Collaboration Manager System Administration Guide* for more detailed information.
- ❖ Recommended: Accept the default (enabled).
 - ❖ Optional: Disable the selection.
10. When the preference field values are complete, click **OK**.
11. The Component Wizard asks if you want to enable Collaboration Manager. Click **Yes**.
The Collaboration Manager component is listed as enabled on the Component List screen.
12. Close the Component Wizard.
13. If you are running on a 7.1.1 Content Server (or earlier version), you must manually copy DocumentAccessSecurity.class from the
<install_dir>\instancename\custom\CollaborationManager\cspatch directory to
<install_dir>\instancename\classes\intradoc\server. You may need to add directories (i.e., intradoc\server) to your instance prior to copying the class file.
14. Restart the Content Server.

Memo Field Sizes

Database limitations including field size, row size, page size, and character encoding impact the size you enter for the memo field.

- ❖ **Field Size:** Memo Field = field size limit in byte/bytes per character.
- ❖ **Row Size:** (Row size limit in byte-total size of nonmemo fields in bytes)/number of memo fields/bytes per character = Memo Field
- ❖ **Page Size:** DB2 has a 32K page size limit and a row length limit.
- ❖ **Character Encoding:** 3, 2, or 1-byte for encoding.

For example: 3 text fields, 3 big text fields, 5 memo fields, and 3-byte encoding

- ❖ Row Size: 4005 bytes
- ❖ Text fields: 3 fields x 30 characters per field x 3 bytes per character = 270 bytes
- ❖ Big text fields: 3 fields x 100 characters per field x 3 bytes per character = 900 bytes

- ❖ Total bytes used in non-memo fields = 1170 bytes
- ❖ MemoFieldSize = 2835 bytes / 5 memo fields / 3 bytes per character = 189 characters per memo field.

Verifying the Installation

To verify that the installation was successful, complete the following steps:

1. Start your web browser and go to the Collaboration Manager home page at *http://[hostname]/[web root]* (for example, *http://master1/oracle/*).
2. Log in as the sysadmin user (*user=sysadmin, password=idc*).
3. Click the **Administration** link and the **Admin Applets** link.
4. Click the User Admin icon.
5. Select the *sysadmin* user.
6. Click **Edit**.
7. Change the system administrator password.



Note: For more information on changing passwords, see *Managing Security and User Access Guide*.

8. Create a new project. Refer to *Adding a Project* in the *Collaboration Manager User Guide* for detailed information about creating a new project.
9. Check in a content item.
10. Verify that the file is processed correctly by Collaboration Manager and that you can search on its metadata information.

INSTALLING COLLABORATION MANAGER ON A PROXIED CONTENT SERVER

This section covers these topics:

- ❖ [Proxy Installation Overview](#) (page 3-10)
- ❖ [Installing Collaboration Manager on a Proxy](#) (page 3-10)

Proxy Installation Overview

The following items apply to installation of Collaboration Manager on a proxied content server:

- ❖ You must have a Collaboration Manager for each installed instance. This means that if you want to install Collaboration Manager on both a master and proxied content server instance, you need two licenses.
- ❖ Collaboration Manager can be installed on only the proxied instance of a content server. It does not have to be installed on the master content server.



Note: The proxied content server security model is based on the master instance. Because of this, if you choose to install Collaboration Manager on only the proxied instance of a content server, both the master content server instance as well as the proxied content server instance must be restarted after the Collaboration Manager installation is complete. Otherwise, some functions of Collaboration Manager will not work properly.

- ❖ Accounts must be enabled on the master content server for Collaboration Manager to work on a proxied content server. If Collaboration Manager is not installed on the master content server, the Collaboration Manager installer enables accounts by setting `UseAccounts=true` in the master content server's configuration file.
- ❖ For details on master content servers and proxied content servers, see the *Content Server Getting Started Guide* and the *Managing System Settings and Processes Guide*.

Installing Collaboration Manager on a Proxy

To install Collaboration Manager on a proxied content server:

1. Install a proxied content server on the master content server. See the *Installing a Proxied Content Server* section of the *Content Server Installation Guide* for the appropriate operating system.
2. Install the Folders component on the proxied content server. See [Installing the Folders Component](#) (page 3-4).
3. Install the Threaded Discussion component on the proxied content server. See [Installing the Threaded Discussions Component](#) (page 3-5).
4. Install Collaboration Manager on the proxied content server. See [Installing the Collaboration Manager Component](#) (page 3-6).

OPTIONAL SETUP

Once you have installed Collaboration Manager, you may want to perform the following optional setup tasks:

- ❖ [User Types Setup](#) (page 3-11)
- ❖ [Company Option List Setup](#) (page 3-11)
- ❖ [Workflow Script Template Setup](#) (page 3-11)
- ❖ [Select User Applet Setup](#) (page 3-12)
- ❖ [Metadata Propagation Setup](#) (page 3-14)
- ❖ [Timer Settings](#) (page 3-14)
- ❖ [Online Conferencing Setting](#) (page 3-14)

User Types Setup

After installation of Collaboration Manager, we recommend that you set a User Type (internal or external) for the default *sysadmin* and *user1* users. Even if you do not intend to use these user names initially, it is a good idea to set the User Type in case they are used at a later time.

Company Option List Setup

The **Company** user information field is added to the User Admin applet with the option list disabled. If you want users to be able to select from a list of values, you can enable the option list and add values as needed.

Workflow Script Template Setup

A particular piece of custom script is required for the entry event in the first step of every Collaboration workflow. If you will be creating several Collaboration workflows, we recommend that you create a script template for the following entry event script:



```
<$exec inc("prj_token_init_script")$>
```

For more information, see the *Workflow Implementation Guide*.

Select User Applet Setup

To configure the Select User applet, the following settings can be added to the `<install_dir>/<instance>/data/components/CollaborationManager/config.cfg` file:

Entry (Default value shown)	Description																													
UseUserSelectApplet=1	Enables the Select User applet. Note that if you are using Apple Macintosh systems, the Select User applet is not displayed even if this option is enabled. In its place, a popup application is used which has similar functionality.																													
UserSelectAppletColumnOption=a	Sets the display and sort order for the user and group columns in the Select User applet. The combinations for each setting are shown below.																													
<table border="1"> <thead> <tr> <th rowspan="2">Setting</th> <th colspan="2">User Columns</th> <th colspan="2">Group Columns</th> </tr> <tr> <th>First (Sort) Column</th> <th>Second Column</th> <th>First (Sort) Column</th> <th>Second Column</th> </tr> </thead> <tbody> <tr> <td>a</td> <td>dFullName</td> <td>dName</td> <td>dAlias</td> <td>dAliasDescription</td> </tr> <tr> <td>b</td> <td>dFullName</td> <td>dName</td> <td>dAliasDescription</td> <td>dAlias</td> </tr> <tr> <td>c</td> <td>dName</td> <td>dFullName</td> <td>dAlias</td> <td>dAliasDescription</td> </tr> <tr> <td>d</td> <td>dName</td> <td>dFullName</td> <td>dAliasDescription</td> <td>dAlias</td> </tr> </tbody> </table>		Setting	User Columns		Group Columns		First (Sort) Column	Second Column	First (Sort) Column	Second Column	a	dFullName	dName	dAlias	dAliasDescription	b	dFullName	dName	dAliasDescription	dAlias	c	dName	dFullName	dAlias	dAliasDescription	d	dName	dFullName	dAliasDescription	dAlias
Setting	User Columns		Group Columns																											
	First (Sort) Column	Second Column	First (Sort) Column	Second Column																										
a	dFullName	dName	dAlias	dAliasDescription																										
b	dFullName	dName	dAliasDescription	dAlias																										
c	dName	dFullName	dAlias	dAliasDescription																										
d	dName	dFullName	dAliasDescription	dAlias																										
UserSelectAppletInternalUserDefaultPermissions=3 UserSelectAppletExternalUserDefaultPermissions=1 UserSelectAppletInternalAliasDefaultPermissions=3 UserSelectAppletExternalAliasDefaultPermissions=1	Set the permissions that will be selected by default in the Select User applet. The following values are possible: ValuePermissions 1Read 3Read, Write 7Read, Write, Delete 15Read, Write, Delete, Admin																													

Entry (Default value shown)	Description
UserSelectAppletDatabaseCaseSensitive=0	<p>Set this variable to 1 if the user database is case-sensitive.</p> <p> Note: If the system configuration setting <i>DatabasePreserveCase</i> is set to <i>true</i> (as is usually the case with an Oracle database), it isn't necessary to set this variable.</p>
UserSelectAppletDatabaseIso8859DictionaryOrder=0	<p>Set this variable to 1 if all of the following are true:</p> <ul style="list-style-type: none"> • The Collaboration Manager database is SQL Server. • The database uses the ISO 8859 (or CP1252) character set. • You have not changed the collation order from its default. <p> Note: If the Select User applet parameter <i>IsLowerCaseCompare</i> is set to <i>true</i> and <i>IsDatabaseCaseSensitive</i> is set to <i>false</i> (or not set), this variable will be set to 1 by default.</p>
UserSelectAppletForceEntriesToLowerCase=0	<p>Set this variable to 1 if the Collaboration Manager has been altered to set all access list parts of the security “where clause” for the database to lowercase. (Internal access list checks must also be done in a case-insensitive manner.)</p>

Metadata Propagation Setup

The *metadata propagation* function is a Folders component feature that enables contributors to copy default metadata values from a folder to its subfolders and content items.

- ❖ By default, no metadata fields are included in propagation. The system administrator must specify which metadata fields will be included. It is recommended that the following fields be propagated:
 - Security Group
 - Account
 - User Access List
 - Group Access List
- ❖ All folders and content items are included in metadata propagation by default, but users can “inhibit” individual folders and content items from being included in metadata propagation.

For more information, see the *Folders Component—About Folders—Metadata Propagation* section of the *Folders/WebDAV Component Guide*.

Online Conferencing Setting

The following setting can be added to the `<install_dir>/<instance>/data/components/CollaborationManager/config.cfg` file:

Entry (Default value shown)	Description
<code>DisableMeetingCenter=1</code>	Disables the On-line Conferencing feature.

Timer Settings

To control various Collaboration Manager timers, the following settings can be added to the `<install_dir>/<instance>/data/components/CollaborationManager/config.cfg` file:

- ❖ These settings are used on pages where multiple services can be called at one time (for example, selecting 20 items and then clicking Subscribe), or where a lengthy process can occur.

- ❖ It can take longer for a Delete action to complete than for other actions, so the “delete” settings are set higher.
- ❖ Generally, you should not change these settings unless users are getting “server not responding” messages because processing is taking longer than the watchdog timers allow.
- ❖ All timer settings are in milliseconds.

Entry (Default value shown)	Description
actionItemInterval=100	Sets the time for the browser to wait before checking to see if an individual service call is completed. (Each service call will take at least this amount of time.)
deleteActionItemInterval=300	Sets the time for the browser to wait before checking to see if an individual Delete service call is completed. (Each Delete service call will take at least this amount of time.)
watchdogInterval=5000	Sets the time for the browser to wait for an individual service call to complete before telling the user that the server is not responding.
deleteWatchdogInterval=45000	Sets the time for the browser to wait for an individual Delete service call to complete before telling the user that the server is not responding.

UNINSTALLING COLLABORATION MANAGER

OVERVIEW

This section covers the following topics:

- ❖ [Basic Procedure](#) (page 4-1)
- ❖ [Uninstalling Collaboration Manager](#) (page 4-2)
- ❖ [Uninstalling the Threaded Discussions Component](#) (page 4-4)
- ❖ [Uninstalling the Folders Component](#) (page 4-5)

BASIC PROCEDURE

The basic uninstall procedure for Collaboration Manager includes:

1. Exit all Windows programs.
2. Uninstall the Collaboration Manager software. See [Uninstalling Collaboration Manager](#) (page 4-2).



Note: It is not necessary to uninstall either Threaded Discussions or Folders if Collaboration Manager is uninstalled. However, if you choose to uninstall them, they should be uninstalled after Collaboration Manager is uninstalled.

3. Uninstall the Threaded Discussions component. See [Uninstalling the Threaded Discussions Component](#) (page 4-4).

4. Uninstall the Folders component along with WebDAV and WebDAVClientHelper70. See [Uninstalling the Folders Component](#) (page 4-5).



Important: Do not use the Add/Remove Programs applet in the Windows Control Panel. It does not perform a complete uninstall.

UNINSTALLING COLLABORATION MANAGER



Important: Do not use the Add/Remove Programs applet in the Windows Control Panel to uninstall the Collaboration Manager. It does not perform a complete uninstall.

To uninstall Collaboration Manager from the content server:

1. If you intend to reinstall Collaboration Manager or want to have a functioning content server instance after the Collaboration Manager is uninstalled, delete all content items from the Collaboration Manager repository.



Note: If you are going to uninstall the Content Server, you do not have to delete content items from the Collaboration Manager.

2. Uninstall Collaboration Manager using either Component Manager or the Component Wizard.

To uninstall the component using the Component Wizard:

- a. Start the Component Wizard by selecting Start—Programs—Content Server—*<instance>*—Utilities—Component Wizard.

The Component Wizard main screen and the Component List screen are displayed.

- b. Select the **Collaboration Manager** item in the custom components list.
- c. Click **Disable**.
- d. If necessary, reselect the component.
- e. Click **Uninstall**.

The Component Wizard asks you to verify the uninstall.

- f. Click **Yes**.

The Uninstall screen displays and lists the component files to be uninstalled.

- g. Click **OK**.

The Component List screen displays. Collaboration Manager is no longer listed.

3. If you plan to immediately uninstall the Threaded Discussions component, proceed to [Uninstalling the Threaded Discussions Component](#) (page 4-4).
4. Otherwise, close the Component Wizard.
5. Restart the Content Server.



Note: Uninstalling Collaboration Manager does not remove the *DISCUSS* document type or the *ClbraUserList* and *ClbraAliasList* metadata fields. If there are no content items that will be affected by removal of these items, you can delete them manually using the Configuration Manager.

Changes to Content Server While Uninstalling Collaboration Manager

The following changes are made to the Content Server when uninstalling Collaboration Manager:

- ❖ *Alert* field is hidden
- ❖ *AlertText* field is hidden
- ❖ *Announcement* field is hidden
- ❖ Company user information field is removed
- ❖ Phone user information field is removed
- ❖ *Internal* and *External* are removed from the user type list
- ❖ Project subscription option is removed
- ❖ Folder subscription option is removed
- ❖ Sample workflows (*SingleReviewer*, *TwoEditors*, and *TwoEditorsOneReviewer*) are removed
- ❖ Workflow tokens (taken from *prjWizardTokens*) are removed
- ❖ Workflow token fields (taken from *prjWizardTokens*) are hidden
- ❖ Selected workflow field (taken from *prjWizardWorkflowField*, default is *SelectedWorkflow*) is hidden
- ❖ *Projects* security group is attempted to be removed. If successful, then
 - Removes *Projects* from *SpecialAuthGroups* in `<install_dir>/<instance_dir>/config/config.cfg` file

- Sets `UseCollaboration=false` in `<install_dir>/<instance_dir>/config/config.cfg` file



Note: The *Projects* security group cannot be removed if content belonging to the security group is still in the Content Server repository, or if the security group is part of a criteria workflow.

UNINSTALLING THE THREADED DISCUSSIONS COMPONENT



Important: Do not use the Add/Remove Programs applet in the Windows Control Panel to uninstall the Threaded Discussions component. It does not perform a complete uninstall.

To uninstall the Threaded Discussions component from the content server:

1. Uninstall the component using either Component Manager or the Component Wizard.

To uninstall Threaded Discussions using the Component Wizard:

- a. Start the Component Wizard by selecting Start—Programs—Content Server—`<instance>`—Utilities—Component Wizard.

The Component Wizard main screen and the Component List screen are displayed.

- b. Select the **Threaded Discussions** item in the custom components list.
- c. Click **Disable**.
- d. If necessary, reselect the component.
- e. Click **Uninstall**.

The Component Wizard asks you to verify the uninstall.

- f. Click **Yes**.

The Uninstall screen displays and lists the component files to be uninstalled.

- g. Click **OK**.

The Component List screen displays. Threaded Discussions is no longer listed.

2. If you plan to immediately uninstall the Folders component (and optionally, the WebDAV and WebDAV Client components), proceed to [Uninstalling the Folders Component](#) (page 4-5).

3. Otherwise, close the Component Wizard.
4. Restart the Content Server.

UNINSTALLING THE FOLDERS COMPONENT



Important: Do not use the Add/Remove Programs applet in the Windows Control Panel to uninstall the Folders component. It does not perform a complete uninstall.

To uninstall the Folders component from the content server:

1. Uninstall the component using either Component Manager or the Component Wizard.

To uninstall Folders (and, if applicable, the WebDAV and WebDAV Client components) using the Component Wizard:

- a. Start the Component Wizard by selecting Start—Programs—Content Server—*<instance>*—Utilities—Component Wizard.

The Component Wizard main screen and the Component List screen are displayed.

- b. Select the **Folders** item in the custom components list.
- c. Click **Disable**.
- d. If necessary, reselect the component.
- e. Click **Uninstall**. The Component Wizard asks you to verify the uninstall.
- f. Click **Yes**. The Uninstall screen displays and lists the component files to be uninstalled.
- g. Click **OK**. The Component List screen displays. Threaded Discussions is no longer listed.



Note: The WebDAV and WebDAVClientHelper70 components were installed during the Folders component installation, and must be uninstalled in addition to Folders. For both the WebDAV and WebDAV Client components, repeat the above uninstall procedure.

2. Close the Component Wizard.
3. Restart Content Server.



INSTALLATION DETAILS

OVERVIEW

This appendix explains the actions that are performed automatically during installation of Collaboration Manager. This description is included in this installation guide to help Collaboration Manager system administrators verify the installation and configuration, and to assist in troubleshooting. This appendix covers the following:

- ❖ [Collaboration Manager Configuration Settings](#) (page A-1)
- ❖ [Configuring Users and Groups](#) (page A-3)
- ❖ [Configuring Workflows](#) (page A-5)
- ❖ [Discussion Metadata Fields](#) (page A-9)
- ❖ [Configuring Subscriptions](#) (page A-10)
- ❖ [Configuring Announcements](#) (page A-10)



Note: See [Optional Setup](#) (page 3-11) for additional items that are not set by the Collaboration Manager installer.

COLLABORATION MANAGER CONFIGURATION SETTINGS

The Collaboration Manager installer adds the following entries to the `<install_dir>/<instance>/data/components/ CollaborationManager/config.cfg` file:

Entry	Description
AllowMixedCaseACL=true	Choose whether you want to allow mixed case entries for database queries or to force entries to lower case.
prjWizardTokens=RoutingToken1, RoutingToken2, RoutingToken3	The names to use for workflow tokens and metadata fields. See Workflow Tokens (page A-6) and Token Metadata Fields (page A-7).
UserSelectAppletColumnOption=a	Enter the letter that specifies the display and sort order for the user and group columns in the Select User applet. See the <i>Projects Administration</i> chapter in the <i>Collaboration Manager System Administration Guide</i> for more detailed information
UseUserSelectApplet=true	Choose whether you want to activate the Select User applet. See the <i>Projects Administration</i> chapter in the <i>Collaboration Manager System Administration Guide</i> for more detailed information.
cmDiscussionDocType=DISCUSS	Specifies which document type is used for discussion items.
prjWizardWorkflowField=Selected Workflow	See Workflow Configuration Settings (page A-7).
prjUseCustomRouting=false	Choose whether you want users to be able to route documents for review.
cmZonedSecurityFields=true	Choose whether you want to enable zoned security fields for searches.

CONFIGURING USERS AND GROUPS

The Collaboration Manager installer performs the following user and group modifications:

- ❖ [User Type Options](#) (page A-3)
- ❖ [User and Group Metadata Fields](#) (page A-3)
- ❖ [User Information Fields](#) (page A-4)

User Type Options

The Collaboration Manager installer adds the following values to the User Type option list in the User Admin tool:

Field	Description
Internal	Users who are employees of the company or members of the organization.
External	Users who have access to the Collaboration Manager system but are not employees of the company or members of the organization.

User and Group Metadata Fields

When the Collaboration Manager is installed, the ClbraUserList and ClbraAliasList metadata fields are automatically added. However, they may or may not be activated. This can be verified by opening the Configuration Manager and checking the Information Fields tab. If enabled, click the UpdateDatabaseDesign button and the database will be updated as necessary.

The following metadata fields are added to the Configuration Manager:



Note: Field captions are localized according to site preferences. The captions noted here are for example purposes only.

Field	Property	Value
User Access	Name	ClbraUserList
	Field Caption	UserList
	Field Type	Memo
	Require Value	No
	Enable for User Interface	Yes
	Enable for Search Index	Yes
	Enable Option List	No
Group Access	Name	ClbraAliasList
	Field Caption	AliasList
	Field Type	Memo
	Require Value	No
	Enable for User Interface	Yes
	Enable for Search Index	Yes
	Enable Option List	No

User Information Fields

The installer adds the following user information fields to the User Admin tool:

Field	Property	Value
Company	Name	Company
	Field Caption	Company
	Field Type	Text
	Administrator Only Edit	No
	View Only Field	No
	Enable Option List	Optional (if yes, system administrator must enter option list values)
Phone	Name	Phone
	Field Caption	Phone
	Field Type	Text
	Administrator Only Edit	No
	View Only Field	No
	Enable Option List	No

CONFIGURING WORKFLOWS

The Collaboration Manager installer performs the following workflow modifications:

- ❖ [Workflow Metadata Field](#) (page A-6)
- ❖ [Workflow Tokens](#) (page A-6)
- ❖ [Token Metadata Fields](#) (page A-7)
- ❖ [Workflow Configuration Settings](#) (page A-7)
- ❖ [Sample Workflows](#) (page A-8)

Workflow Metadata Field

The Collaboration Manager installer adds the following metadata field to the Configuration Manager so that Collaboration workflows can use it as the criteria field. This field must be set as the value of the *prjWizardWorkflowField* setting. (See [Workflow Configuration Settings](#) (page A-7).)

Field	Property	Value
Selected Workflow	Name	SelectedWorkflow
	Field Caption	Selected Workflow
	Field Type	Text
	Require Value	No
	Enable for User Interface	Yes
	Enable for Search Index	Yes
	Enable Option List	No

Workflow Tokens

The Collaboration Manager installer adds the following three workflow tokens to the Workflow Admin tool. These tokens must be the same as the [Token Metadata Fields](#) (page A-7) and *prjWizardTokens* setting (see [Workflow Configuration Settings](#) (page A-7)).

Token	Script
RoutingTokenX (where X=1 through 3)	<\$wfAddUser(wfGet("RoutingTokenX"), "user")\$>

Token Metadata Fields

The Collaboration Manager installer adds three token metadata fields to the Configuration Manager. Each field holds workflow routing information and corresponds to a new workflow token. These fields must be the same as the [Workflow Tokens](#) (page A-6) and *prjWizardTokens* setting (see [Workflow Configuration Settings](#) (page A-7)).

Field	Property	Value
RoutingTokenX (where X=1 through 3)	Name	RoutingTokenX
	Field Caption	RoutingTokenX
	Field Type	Memo
	Require Value	No
	Enable for User Interface	Yes
	Enable for Search Index	Yes
	Enable Option List	No

Workflow Configuration Settings

The installer sets up the following workflow configuration settings:

Entry	Location	Description
<code>prjUseCustomRouting=1</code>	<code><install_dir>/custom/ CollaborationManager/lenvi ronment.cfg</code>	Enables content item routing in the Collaboration Manager.
<code>prjWizardWorkflowField= SelectedWorkflow</code>	<code><install_dir>/<instance>/ data/components/Collaborati onManager/config.cfg</code>	Specifies which metadata field is used as the criteria for a Collaboration workflow. The value of this setting must be the name of the Workflow Metadata Field (page A-6).

Entry	Location	Description
prjWizardTokens=RoutingToken1, RoutingToken2, RoutingToken3	<i><install_dir>/<instance>/data/components/CollaborationManager/config.cfg</i>	Comma-separated list of workflow tokens that also have corresponding metadata fields. These values must be the same as the Workflow Tokens (page A-6) and Token Metadata Fields (page A-7).

Sample Workflows

The Collaboration Manager installer adds the following sample Collaboration workflows to the Workflow Admin tool:

Workflow	Description
SingleReviewer	One reviewer step, with one token defined.
TwoEditors	Two reviewer/contributor steps, with one token defined for each step.
TwoEditorsOneReviewer	Two reviewer/contributor steps and one reviewer step, with one token defined for each step.

DISCUSSION METADATA FIELDS

The Collaboration Manager installer adds the following metadata fields to the Configuration Manager:

Field	Property	Value
Discussion Type*	Name	DiscussionType
	Field Caption	Discussion Type
	Field Type	Text
	Require Value	No
	Enable for User Interface	Yes
	Enable for Search Index	Yes
	Enable Option List	Yes
Alert	Name	Alert
	Field Caption	Display as Alert
	Field Type	Text
	Require Value	No
	Enable for User Interface	Yes
	Enable for Search Index	Yes
	Enable Option List	Yes; options are <i>no</i> and <i>yes</i>
AlertText	Name	AlertText
	Field Caption	AlertText
	Field Type	Long text
	Require Value	No
	Enable for User Interface	Yes
	Enable for Search Index	Yes
	Enable Option List	No

* The Discussion Type metadata field is added by the Threaded Discussions component. However, if it is not present, then it is added by Collaboration Manager. Either way, Collaboration Manager updates the option list that is used.

CONFIGURING SUBSCRIPTIONS

The Collaboration Manager installer adds the following subscription types to the Repository Manager:

Entry	Description	Notifications	Criteria
Project	Allows users to subscribe to all items in a project.	Enabled	Account
Folder	Allows users to subscribe to all items in a folder.	Enabled	Folder (this is the field caption for the xCollectionID field)

CONFIGURING ANNOUNCEMENTS

The Collaboration Manager installer adds the following metadata field to the Configuration Manager:

Field	Property	Value
Announcement	Name	Announcement
	Field Caption	Announcement
	Field Type	Text
	Require Value	No
	Enable for User Interface	Yes
	Enable for Search Index	Yes
	Enable Option List	Yes; options are <i>no</i> and <i>yes</i>

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