Oracle® Universal Records Management
Universal Records Manager Installation Guide
10*g* Release 3 (10.1.3.3.1)

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Universal Records Manager Installation Guide, 10*g* Release 3 (10.1.3.3.1)
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INSTALLATION OVERVIEW

OVERVIEW

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ABOUT THIS GUIDE

This guide provides instructions on how to install Universal Records Manager version 10gR3 on a computer running either Microsoft Windows or UNIX.

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.

Audience

This guide is intended for system administrators who need to install Universal Records Manager (URM) .

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.

❖ The notation *<install_dir>* is used to refer to the location on your system where the URM Server instance is installed.

❖ Notes, technical tips, important notices, and cautions use these conventions:

Symbols	Description
	This is a note. It is used to bring special attention to information.
	This is a technical tip. It is used to identify information that can be used to make your tasks easier.
	This is an important notice. It is used to identify a required step or required information.
	This is a caution. It is used to identify information that might cause loss of data or serious system problems.

ABOUT UNIVERSAL RECORDS MANAGER

Universal Records Manager (URM) allows organizations to manage their records and retention policies, disposition processes, and litigation or audit holds in a central repository. They can then apply those policies, dispositions, and holds to content stored in multiple repositories through URM adapters. In conjunction with URM, DoD Edition is used to manager the rules governing dispositions. PCM is used to manage items in non-electronic formats. The repositories can be any server or application that holds content whose retention is to be controlled.

The repository might hold records that need to be preserved for a retention period, specified in a corporate retention schedule, and then destroyed according to a corporate disposition process. The records can be preserved in place if the repository has the ability to ensure that the record will remain unalterable during the retention period. The repository also needs to be able to purge the records (overwrite the files on the disk multiple times) at the end of the retention period. Adapters associated with repositories that cannot manage records as described might have to move the records to URM for proper preservation and disposition.

Repositories might also hold content that is not considered a business record, where there is no requirement that the content be preserved for the retention period. However, it might be desirable to ensure that the content is deleted when the cost or risk of maintaining it outweighs its value to the organization, as defined in the corporate retention policies. At that time, the content would be disposed of according to the disposition processes stored within URM .

All URM content items and the retention policies, schedules, disposition schedules, and holds associated with them are stored in a central repository known as a Universal Records Manager Server. Policies and dispositions can be applied to content stored in multiple repositories by using URM adapters. See the *URM Adapter Services Reference Guide* for details about using URM adapters.

URM also provides the following functionality needed to create these custom adapters:

❖ the WsdlGenerator component (*WsdlGenerator.zip*)

❖ Wsdl function call generator (*WsdlDetails.zip*)

❖ Samples of custom wsdls

These components are provided on the URM media. After installation, they are stored in the *<install_dir>/custom* directory. See the documentation provided with these components and the *URM Adapter Services Reference Guide* for more details.

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Tech Tip: When Universal Records Manager is installed, a custom WSDL file (*wsdl_custom.hda*) that includes the URM API is merged with any custom WSDL files already on the content server. The URM installer attempts to place the merged *wsdl_custom.hda* file in the *<install_dir>/data/soap/custom* directory. The *wsdl_custom.hda* file is also available with the URM component files in the *<install_dir>/custom/ExternalHelper/data/soap/custom* directory.

About Records Manager DoD Edition

Records Manager DoD Edition enables you to manage records and non-record content items—regardless of their source or format—in a single, consistent, manageable infrastructure. Records and non-record content items managed by Records Manager DoD Edition are assigned retention schedules and disposition rules that control their lifecycle.

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

Records Manager DoD Edition is compliant with the DoD 5015.2 standard (including Chapter 4), and certified by the Joint Interoperability Test Command (JITC). A copy of the standard is available on the official website of the Department of Defense, Washington Headquarters Services, Directives and Records Division at http://www.dtic.mil/whs/directives/.

In addition to records, URM can also manage disposition schedules of non-record content in the content server. This enables you to schedule lifecycles for content to eliminate outdated or superseded information, manage storage resources, or comply with legal audit holds.

About Physical Content Manager

Physical Content Manager (PCM) is an optional add-on to the URM application. URM enables organizations to manage the retention and disposition of electronic records and non-record content. PCM extends this capability to physical records and non-record content that are not stored in the content server in electronic form. All items—both internal and external, regardless of their source or format—are managed in a single, consistent, manageable infrastructure using one central application and a single user interface. The same file plan and retention schedules are used for both electronic (internal) and physical (external) records and non-record content.

SOFTWARE REQUIREMENTS

Supported Hardware and Software

Consult your Content Server documentation for a list of currently supported hardware platforms and software versions.

Required Software

Content Server 10gR3 must be installed and functioning correctly before you can install the URM 10gR3 software.

Optional Software

The following software might be required for URM 10gR3, depending on the desired functionality:

❖ Desktop 7.0 or higher, including Outlook Integration (for checking in records from within supported e-mail clients). It is recommended that you install the latest available version.

> **Note:** See the Desktop documentation for information on the Outlook integration. E-mail messages or attachments saved as text or other format from any e-mail client application can be manually checked in as records using the standard browser interface (content server check-in page).

Client Software

Depending on your physical content management needs, you may want to install any of the following client software:

❖ Barcode Utility—This is a software utility that enables you to program the Videx LaserLite barcode scanner for use with PCM. In addition, it can directly upload information fom the barcode scanner to the PCM application, or write the information to a file for later processing.

❖ Software to print barcode labels (depending on the selected label format in PCM):

• Adobe Acrobat version 7 or greater, or

• Print Report Utility with printing software (Crystal Reports or ColorBar)

> **Note:** The Print Report Utility and Barcode Utility require the Microsoft .NET Framework Version 1.1 Redistributable Package. If you do not already have this on your computer, you can download it from the Microsoft website (www.microsoft.com).

OPTIONAL HARDWARE

Depending on your physical content management needs, you may need the following hardware:

❖ Videx LaserLite barcode scanner

❖ Printer for barcode label

> **Note:** The Physical Content Manager software does not ship with either of these hardware devices. They need to be purchased separately.

INSTALLING UNIVERSAL RECORDS MANAGER

OVERVIEW

Performing a new installation of the Universal Records Manager 10gR3 software consists of the following steps:

1. Pre-Installation Tasks and Considerations (page 2-2)
   - ❖ Disable Content Basket and Image/Video Manager (page 2-2) (if required)
   - ❖ Preparing a DB2 Database (page 2-2) (if required)

Note: Certain components must be disabled and/or uninstalled before you can install URM 10gR3. If you are upgrading from a previous version of URM, PCM or Records Manager, go to Chapter 3 (*Upgrading From Previous Versions)*

2. Installing the Universal Records Manager software:
   - ❖ Installing URM with Component Manager (page 2-4)
   - ❖ Installing URM with Component Wizard (page 2-5)

3. Restarting Content Server (page 2-7)

4. Rebuilding the Content Server Search Index (page 2-8) (if required)

5. Post-Installation Tasks and Considerations (page 2-9)
   - ❖ Assigning Privileges to Users (page 2-9)
   - ❖ Installing the Print Report Utility (page 2-9)
   - ❖ Installing the Barcode Utility (page 2-11)

Important: Universal Records Manager 10gR3 is not compatible with Content Server releases prior to 10gR3.

PRE-INSTALLATION TASKS AND CONSIDERATIONS

Before installing Universal Records Manager, please note the following tasks and considerations:

❖ Disable Content Basket and Image/Video Manager (page 2-2)

❖ Preparing a DB2 Database (page 2-2)

Disable Content Basket and Image/Video Manager

If you are running Image Manager and/or Video Manager on the same computer where you will install Physical Content Manager, disable Image/Video Manager's content basket component (ContentBasket) before installing the Physical Content Manager software.

Note: Image Manager and Video Manager will not lose content basket functionality as they will automatically switch to using Physical Content Manager's content basket component (PriorityContentBasket).

Preparing a DB2 Database

If you are using DB2 as the database, you might need to make some configuration changes. DB2 has a default page size of 4K, while Universal Records Manager requires a 32K page size. If you are using DB2's default page size, you will need to create additional tablespace that can handle a 32K page size.

To create additional tablespace for the DB2 database, complete the following steps:

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 URM database to activate the newly created BufferPool:

❖ If the URM 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, use the following commands to reload the database:

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, temporary tablespace, and system 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_dir_path_for_tablespace>') BufferPool WIDE
CREATE TEMPORARY TABLESPACE TEMP_WIDE_TBSP PAGESIZE 32K MANAGED BY SYSTEM
USING ('<absolute_dir_path_for_temp_tablespace>') BufferPool WIDE
CREATE SYSTEM TEMPORARY TABLESPACE TEMP_SYS_W_TBSP PAGESIZE 32K MANAGED BY
SYSTEM USING ('<absolute_dir_path_for_system_tabspace>')
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>
```

Important: After URM is installed, you should set the SkipUnicodeSQLQueryConversion=true configuration variable in the config.cfg file. See Setting Content Server Configuration Variables (page 2-15) for further details.

INSTALLING URM WITH COMPONENT MANAGER

To install the URM software using Component Manager, complete the following steps:

1. Open a new browser window and log into Content Server as a system administrator.

2. Click the **Admin Server** link in the Administration tray.

3. On the Content Admin Server page, click the button of the content server instance where you want to install the URM software.

   The status page for the content server instance is displayed.

4. In the option list for the server instance, click the **Component Manager** link.

   The Component Manager page is displayed.

Important: You must install the CommonUtilitiesBundle component prior to installing Universal Records Manager.

5. Install the CommonUtilitiesBundle component:

   a. Click the **Browse** button next to the **Install New Component** field.

   b. Navigate to the CommonUtilitiesBundle component zip file (typically called *CommonUtilitiesBundle.zip*). Double-click the zip file or click **Open**.

   c. Click **Install**. An overview page is displayed providing a list of the items that will be installed.

   d. Click **Continue**. All required files are now installed. This might take a few minutes.

   e. After all files have been copied, a message is displayed stating that the component was uploaded and installed successfully.

   f. Click the link to enable the component.

   g. Click the restart icon ( ) to restart the content server instance. This may take several minutes to complete.

   h. Click the **Component Manager** link to return to the Component Manager.

6. Install Universal Records Manager:

    a.   Click the **Browse** button next to the **Install New Component** field.

    b.   Navigate to the Universal Records Manager component zip file (typically called *UniversalRecordsManager.zip*). Double-click on the zip file or click **Open**.

    c.   Click **Install**. An overview page is displayed providing a list of the items that will be installed.

    d.   Click **Continue**. The Install Settings page is displayed providing a list of the options that can be enabled.

    e.   Specify which options to install.

        •   Classified Enhancements: used for setting specific security options

        •   Records Manager Email: used to provide disposition of email

        •   DoD Configuration: used to install DoD-compliant interface options

        •   Physical Content Manager: used to install PCM

Note: For further details about the various installation options, see Appendix A (*Installation Details*).

    f.   Click **Continue**. All required files are now installed. This might take a few minutes.

    g.   After all files have been copied, a message is displayed stating that the components were uploaded and installed successfully.

    h.   Click the link to enable the components and restart the server.

    i.   Click the **Component Manager** link to return to the Component Manager.

7.   Restart the content server instance:

    a.   In the option list for the server instance, click the **Start/Stop Content Server** link.

       The content server status page is displayed.

    b.   Click the restart icon ( ) to restart the content server instance. This may take several minutes to complete.

8.   Rebuild the search index (if required). For further information, see Rebuilding the Content Server Search Index (page 2-8).

INSTALLING URM WITH COMPONENT WIZARD

To install URM software using Component Wizard, complete the following steps:

1.   Start Component Wizard:

❖ In Windows, choose **Start—Programs—Content Server—*<instance>*—Utilities—Component Wizard**.

❖ In UNIX, navigate to the *<install_dir>/bin* directory. At the command prompt, type `ComponentWizard`.

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

Important: You must install the Common Utilities Bundle prior to installing URM.

2. Install the CommonUtilitiesBundle component:

a. On the Component List screen, click **Install**. The Install dialog is displayed.

b. Click **Select** and navigate to the CommonUtilitiesBundle component zip file (typically called *CommonUtilitiesBundle.zip*).

c. Double-click on the zip file or click **Open**. The Install list displays the files that will be installed.

d. Click **OK**. All required files are now installed. This might take a few minutes.

e. After all files have been copied, you are prompted to confirm enabling the component. Click **Yes**. The component must be enabled, but you do not need to restart the content server instance at this point.

f. On the Component Wizard main screen, select **Options—Open** to display the Component List screen.

3. Install Universal Records Manager:

a. On the Component Wizard main screen, select **Options—Install**. The Install dialog is displayed.

b. Click **Select** and navigate to the Universal Records Manager component zip file (typically called *UniversalRecordsManager.zip*).

c. Click **OK**. The Edit Preference page is displayed providing a list of the options that can be enabled. Specify which options to install.

• Classified Enhancements: used for setting specific security options

• Records Manager Email: used to provide disposition of email

• DoD Configuration: used to install DoD-compliant interface options

• Physical Content Manager: used to install PCM

Note: For further details about the various installation options, see Appendix A (*Installation Details*).

> **Important:** Oracle Records Manager 10gR3 has been certified to comply with Chapter 4 of the DoD 5015.2 standard (classified records). If you intend to use this functionality, make sure that you select the Classified Enhancements option (not selected by default for new installations).

    d.   Click **Ok**. All required files are now installed. This might take a few minutes.

    e.   After all files have been copied, you are prompted to confirm enabling the listed components. Click **Yes**. The components must be enabled, but you must not restart the content server instance at this point.

4.   Restart the content server instance. For further information, see Restarting Content Server (page 2-7).

5.   Rebuild the search index (if required). For further information, see Rebuilding the Content Server Search Index (page 2-8).

RESTARTING CONTENT SERVER

Whenever you install, enable, disable or remove a component, you must restart the content server. If you prefer or require any down time, you might also choose to stop and then start Content Server with two separate commands.

You can restart the content server by reinitiating the services (Windows) or by reinitiating the processes (UNIX).

You can also restart the content server by using the Admin Server. You need to have the 'sysmanager' role to access a content server through Admin Server.

To restart a content server using Admin Server, complete the following steps:

1.   Log into Content Server as a system administrator.

2.   Click the **Admin Server** link on the Administration tray.

3.   On the Content Admin Server page, click the button of the content server instance that you want to restart.

    The status page for the content server instance is displayed.

4.   In the option list for the server instance, click the **Component Manager** link. Verify that the component is displayed in the **Enabled Components** box, if installing a new component, or **Disabled Components** box if removing a component.

5. In the option list for the server instance, click the **Start/Stop Content Server** link.

6. Restart the content server by clicking the restart icon ( ). This may take several minutes to complete.

Note: For more information about restarting content servers, refer to the administration guides provided with Content Server.

REBUILDING THE CONTENT SERVER SEARCH INDEX

Important: This step is only required if your content server is using Verity or FAST as the search/index engine. If you are using database searching/indexing, you do not need to rebuild the search index.

A new installation of Universal Records Manager 10gR3 adds custom metadata fields to the content server. For an overview of these fields, see Appendix B (*Universal Records Manager Metadata Fields*). After installing Universal Records Manager 10gR3 for the first time, you need to rebuild the search index.

Please note the following:

❖ After installing Universal Records Manager for the first time, you *must* rebuild the search index for Universal Records Manager to function properly. If you do not, security is not applied to search results. This means that users can see records and non-record content items to which they do not have access in the search results list. If they try to access these records and non-record content items, an "access denied" error is displayed. This might interfere with your organization's security model, as users will be able to see some metadata information about the records and non-record content items (for example, their title).

❖ Rebuilding the search index can be a very time-consuming process, depending on the number of content items managed by your content server instance. It is therefore recommended that you rebuild the index during off-peak hours of Content Server use, which is typically at night or on a weekend.

To rebuild the search index, complete the following steps:

1. Log into Content Server as a system administrator.

2. Go to the Administration Applets page and click the **Repository Manager** link.

   The Repository Manager utility is started.

3. In Repository Manager, select the **Indexer** tab.

4. In the Collection Rebuild Cycle area (bottom half), click the **Start** button.

   The index is now rebuilt. During the rebuild process, the Start button in the Collection Rebuild Cycle area is grayed out and cannot be clicked. The process is completed when the Start button is available again.

5. Exit the Repository Manager utility.

POST-INSTALLATION TASKS AND CONSIDERATIONS

After installing the Physical Content Manager application, please note the following tasks and considerations:

❖ Assigning Privileges to Users (page 2-9)

❖ Installing the Print Report Utility (page 2-9)

❖ Installing the Barcode Utility (page 2-11)

Assigning Privileges to Users

After installation, roles are assigned automatically to the Content Server 'sysadmin' user. In Records Management, the 'rma', 'rmaprivileged' and 'rmaadmin' roles are assigned.

If PCM is installed, the sysadmin role automatically assigned the predefined PCM 'pcmadmin' and 'pcmrequestor' roles. No other users will have any PCM rights by default. You need to assign PCM rights to these users before they can start using the physical content management functionality.

Each of these predefined roles comes with a default set of permissions and rights, but these can be modified to suit your specific needs. You can also create new roles and assign rights to them, or grant management rights to existing roles. This enables you to define a very granular security model for your content management environment.

For more information about rights and assigning them to users, refer to the documentation for each product.

Installing the Print Report Utility

The optional Print Report Utility is a Windows application that enables you to view and print label files in the PLB format generated by Physical Content Manager. The PLB files are XML-based, plain-text files that contain data for user labels, storage object labels, or labels for physical items.

Please note the following:

❖ The Print Report Utility is a Windows application; it does not run under UNIX.

❖ The Print Report Utility requires the Microsoft .NET Framework Version 1.1 Redistributable Package. If you do not already have this on your computer, you can download it from the Microsoft website (www.microsoft.com).

❖ The installer for the Print Report Utility is included on the Physical Content Manager software distribution media, and, after installation of the PCM software, also on the computer running PCM at *[CS_Instance_Dir]/custom/PhysicalContentManager/ Client/.*

❖ You do not need to install this utility on the same computer as Physical Content Manager. You can install it on any computer as long as it has access to the PLB files generated by Physical Content Manager.

❖ If you prefer not to use report files in the PLB format, make sure that you set the default report format to Adobe Acrobat (on the Configure Physical Content Manager page). The reports are then generated as industry-standard PDF files. Refer to the *Physical Content Manager System Administration Guide* for further details.

Installing the Software

To install the Print Report Utility, complete the following steps:

Important: If you are reinstalling or upgrading the Print Report Utility, make sure that you uninstall the existing instance first.

1. Locate the executable installer file, named *PrintReportsUtility.exe*, which is stored in *[CS_Instance_Dir]\custom\PhysicalContentManager\Client* or on the Physical Content Manager distribution media.

2. Double-click the executable file to start the installer.

3. Follow the instructions on screen to install the software. By default, the software is installed in *C:\Program Files\Stellent\Print Report Utility*, but you can select a different directory for installation.

Starting the Software

After installing the Print Report Utility software, you can start it by clicking **Start**—**Programs**—**Stellent**—**Print Report Utility**—**Print Report Utility**. You can also double-click the utility icon on the Windows desktop.

Note: For more information about using the Print Report Utility, refer to the *Physical Content Manager System Administration Guide*.

Installing the Barcode Utility

If you will be using barcodes, you need to install the Barcode Utility to program the Videx LaserLite barcode scanner. You also use this utility to directly upload scanned barcode data to the Physical Content Manager application, or to write the data to a file for later processing.

Please note the following:

❖ The Physical Content Manager software does not come with a Videx LaserLite barcode scanner. This device needs to be purchased separately.

❖ The Barcode Utility is a Windows application; it does not run under UNIX.

❖ The installer for the Barcode Utility is included on the Physical Content Manager software distribution media, and, after installation of the PCM software, also on the computer running PCM at *<install_dir>/custom/PhysicalContentManager/Client/*.

❖ The Barcode Utility requires the Microsoft .NET Framework Version 1.1 Redistributable Package. If you do not already have this on your computer, you can download it from the Microsoft website (www.microsoft.com).

❖ You do not need to install this utility on the same computer as Physical Content Manager. You can install it on any computer as long as it can connect to the barcode scanner.

Installing the Software

To install the Barcode Utility, complete the following steps:

Important: If you are reinstalling or upgrading the Barcode Utility, make sure that you uninstall the existing instance first.

1. Locate the executable installer file, named *BarcodeUtility.exe*, which is stored in *<install_dir>\custom\PhysicalContentManager\Client* or on the Physical Content Manager distribution media.

2. Double-click the executable file to start the installer.

3. Follow the instructions on screen to install the software. By default, the software is installed in *C:\Program Files\Stellent\BarCode Utility*, but you can select a different directory for installation.

Starting the Software

After installing the Barcode Utility software, you can start it by clicking **Start**—**Programs**—**Stellent**—**Barcode Utility**—**Barcode Utility**. You can also double-click the utility icon on the Windows desktop.

Note: For more information about using the Barcode Utility, refer to the *Physical Content Manager System Administration Guide*.

Programming the Barcode Scanner

The Physical Content Manager software can be used in conjunction with a Videx LaserLite barcode scanner, which can read barcodes for content tracking and management purposes. Before you can use the barcode scanner, you need to program it using the Barcode Utility.

Important: The Physical Content Manager software is not provided with a Videx LaserLite barcode scanner. You need to purchase it separately.

To program the Videx LaserLite barcode scanner, complete the following steps:

1. Start the Barcode Utility application.

   The main Barcode Utility screen is displayed.

2. Select **Options—Program Videx Wand**.

   The Program Videx Barcode Wand screen is displayed.

3. Choose "Videx LaserLite" in the **Communication Device** dropdown list. This is currently the only available option.

4. Choose the communication port that the device is connected to.

5. Click **Program** when you have made your selections.

   A message appears, indicating that the application is communicating with the scanner. The dialog closes when the programming finishes.

6. Click **Done** on the Main Barcode Utility screen.

7. Push the **Scan** button on the scanner.

Note: For more information about using the Barcode Utility, refer to the *Physical Content Manager System Administration Guide*.

Populating Option Lists

Universal Records Manager adds a number of metadata fields to the content server database. Some of these new fields have option lists, which need to be populated with entries that are meaningful to your organization. The following standard metadata fields typically require custom option list values:

❖ Audit Period (for the built-in audit approval recurring trigger)

❖ Classification Reason

❖ Declassify Exemption Category

Note: Classification Reason and Declassify Exemption Category only show up if the Classified Enhancements component is selected during installation..

❖ Media Type (i.e., the format in which external records exist)

❖ Originating Organization (i.e., the official name or code of the organization responsible for creating a record)

❖ Record Format

If your organization uses these fields, you need to populate the option lists with selections appropriate to your organization. All of the option lists already have default values (for example, "Default"). You can use the procedure below to customize the option lists for information fields. In addition to the standard Universal Records Manager metadata fields mentioned above, there might be other optional fields that require custom values:

❖ any fields required for custom recurring triggers that are not built in

❖ document field options for custom security fields

For further details about creating custom recurring triggers and security fields, see the *DoD Edition System Setup Guide*.

To customize option list values, complete the following steps:

1. Open a new browser window and log into Content Server as a system administrator.

2. Go to the Administration Applets page and click the **Configuration Manager** link.

   The Configuration Manager applet opens.

3. Select the **Information Fields** tab.

Tech Tip: You can alphabetize the fields by clicking on the Name column heading. Clicking on this heading again reverses the sort order.

4. In the **Field Info** list, select the field with option list values you want to modify, and click **Edit**.

   The Edit Custom Info Field dialog is displayed.

5. Click **Configure** next to the Enable Option List field.

   Note: If the Enable Option List check box is not selected, the field does not use an option list, and the Configure button is not available.

   The Configure Option List dialog is displayed.

6. Click **Edit** next to the Use Option List field.

   The Option List dialog is displayed.

7. Type your entries in the list box and insert a carriage return after each entry. If you do not set a default value for the field (see step 9), the field value will initially be blank and users can select one from the list. Otherwise, the default value is preselected, but users can still select a different value from the list. Specify your sort order preferences and click **OK**. The Options List dialog closes.

8. Click **OK** to close the Configure Option List dialog.

9. In the Edit Custom Info Field dialog, specify a default field value if there is one for your organization (in the **Default Value** field).

10. Click **OK**.

11. Repeat steps 4–10 for each metadata field with option list values you want to modify.

12. Once you are done defining the option lists, you do not need to restart the content server. You can select the New Check In menu option and test that your option lists are displayed as you prefer. In the content check-in form, select "Is Record," and verify that your option lists appear as designed.

SETTING CONTENT SERVER CONFIGURATION VARIABLES

After installing Universal Records Manager 10gR3 for the first time, you should set the following Content Server configuration variables:

Content Server Variable	Default Value	Description
NumConnections	5	This is a standard Content Server configuration variable that you must increase to 10 or greater to address the additional batch services used by URM. URM batch services use 5 connections when adding, updating, or deleting external items. If the value for the NumConnections variable is not increased to 10 or greater, you might experience connection problems.
EnableLongMemoFieldForSCS7	false	This is a Content Server configuration variable specific to URM. You should set this variable to true if you are using Microsoft SQL Server 2005, to accommodate the longer Memo fields that can be created by URM adapters. When this variable is set to true, during table creation the length of the Memo type is 2,000,000,000. When this variable is set to false, the length of the Memo type is 1000 (note that is specific to Universal Records Manager; the default Memo type length for Content Server is 255). When using any database other than Microsoft SQL Server 2005, the EnableLongMemoFieldForSCS7 configuration variable has no effect on content server functionality.

Content Server Variable	Default Value	Description
ShowCreateExternalMenu	false	This is a Content Server configuration variable specific to URM. You can set this variable to true if you want to display the following create external source features in your content server interface (otherwise, these features will not be displayed): • **Create <external_source_name> Item** option in the External Content—<external_source_name> sub-menu. Note that the External Content menu is displayed only if an external source has been created. • **Create <external_source_name> Record** option (record categories) or **Check in New <external_source_name> Item** option (non-record categories) in the Action menu on the Exploring Retention Category page. • **Create <external_source_name> Record** option (record categories only) in the Action menu on the Exploring Records Folder page. • **Link New <external_source_name> Item** option in the Action menu on any link page.
SkipUnicodeSQLQueryConversion	true	When using DB2 database, errors may occur if apostrophes appear in URM fields. You can set this variable to disable query conversion and allow apostrophes.

To set these Content Server configuration variables, complete the following steps:

1. Open a new browser window and log into Content Server as a system administrator.

2. Click the **Admin Server** link in the Administration tray.

3. On the Content Admin Server page, click the button of the content server instance where URM is installed. The status page for the content server instance is displayed.

4. In the option list for the server instance, click the **General Configuration** link. The General Configuration page is displayed.

5. After installing Universal Records Manager 10gR3 for the first time, you must set the NumConnections Content Server configuration variable. Add this variable in the Additional Configuration Variables field, and set the value equal to or greater than 10 to address the additional batch services used by URM:

   `NumConnections=10`

6. If you are using Microsoft SQL Server 2005, you should set the EnableLongMemoFieldForSCS7 configuration variable to accommodate the longer Memo fields that can be created by URM adapters. To do so, add this variable in the Additional Configuration Variables field and set the value to true:

   `EnableLongMemoFieldForSCS7=true`

7. If you want to display the create external source features in the content server interface, you can set the ShowCreateExternalMenu variable. To do so, add this variable in the Additional Configuration Variables field and set the value to true:

   `ShowCreateExternalMenu=true`

8. If you are using a DB2 database, you should set a variable to disable query conversion. To do so, add this variable in the Additional Configuration Variables field and set the value to true:

   `SkipUnicodeSQLQueryConversion=true`

9. Click **Save**.

10. Restart the content server.

Tech Tip: While it is recommended that you set Content Server configuration variables using Admin Server, Content Server configuration variables can also be set by editing the *config.cfg* file located in the *<install_dir>/config* directory.

3

UPGRADING FROM PREVIOUS VERSIONS

OVERVIEW

If upgrading from previous versions of URM, RM or PCM, several different scenarios can occur. This chapter discusses the following upgrade possibilities:

1. Upgrading from version 7.1.3 (Records Manager or PCM) (page 3-1)

2. Upgrading from version 7.1.4 (Records Manager) (page 3-3)

3. Upgrading from Version 7.1.4 (URM or PCM) (page 3-5)

UPGRADING FROM VERSION 7.1.3 (RECORDS MANAGER OR PCM)

If you are upgrading from Records Manager or Physical Content Manager version 7.1.3, several components must be disabled and removed before installing Universal Records Management 10gR3 or they will conflict with the updated components.

> **Important:** Universal Records Manager 10gR3 is not compatible with Content Server releases prior to 10gR3.

Disable Components

To disable components, follow these steps:

1. Open a new browser window and log into Content Server as a system administrator.

2. Click the **Admin Server** link from the Administration tray.

3. On the Content Admin Server page, click the button of the content server instance where you want to install the Universal Records Management software.

   The status page for the content server instance is displayed.

4. In the option list for the server instance, click the **Component Manager** link.

5. The Component Manager page is displayed.

   a. Select the component in the Custom Components list. Disable the following components:

   - RecordsManager
   - RecordsManagement
   - RmaLinks
   - PopupCalendarEx
   - LayoutManagerPatch75
   - CSCompatibility-7.5.1
   - ExternalHelper
   - PhysicalContentManager
   - WorkflowTemplateChanges

   b. Click **Disable**.

   c. Repeat steps a and b for each of the preceding components that are enabled.

Important: The RecordsManager and RecordsManagement components must be disabled, but must not be uninstalled. If you uninstall these components after installing Universal Records Manager, you will have to re-install Universal Records Manager.

6. Restart the content server instance. For further information, see Restarting Content Server (page 2-7).

Uninstall Components

To uninstall components, follow these steps:

1. After disabling the components, you must complete the following steps to uninstall them:

   a. On the Component List screen, select the component in the Custom Components list.

    b.   Select the component from the Uninstall Component drop-down menu. Uninstall the following components:

- RmaLinks
- PopupCalendarEx
- LayoutManagerPatch75
- CSCompatibility-7.5.1
- ExternalHelper
- PhysicalContentManager
- WorkflowTemplateChanges

Important: The RecordsManager and RecordsManagement components must not be uninstalled. Leave these components disabled.

    c.   Click **Uninstall**

    d.   Click **OK** to confirm your selection.

    e.   When the component has been uninstalled, click the link to return to the Component Manager.

    f.   Repeat steps b through e for each of the preceding components to be uninstalled.

2. Restart the content server instance. For further information, see Restarting Content Server (page 2-7)..

3. Continue with Installing Universal Records Manager (page 2-1).

UPGRADING FROM VERSION 7.1.4 (RECORDS MANAGER)

If you are upgrading from Records Manager version 7.1.4, several components must be removed before installing Universal Records Management 10gR3 or they will conflict with the updated components. Complete the following steps prior to installing URM:

Disable Components

To disable components, follow these steps:

1. Open a new browser window and log into Content Server as a system administrator.

2. Click the **Admin Server** link from the Administration tray.

3. On the Content Admin Server page, click the button of the content server instance where you want to install the Universal Records Management software.

   The status page for the content server instance is displayed.

4. In the option list for the server instance, click the **Component Manager** link.

5. The Component Manager page is displayed.

   a. Select the component in the Custom Components list. Disable the following components:

   • RecordsManager

   • RecordsManagement

   • RmaLinks

   • PopupCalendarEx

   • LayoutManagerPatch75

   • CSCompatibility-7.5.1

   • WorkflowTemplateChanges

   • RmaPersonalization

   • TableCreationCompatibility

   b. Click **Disable**.

   c. Repeat steps a and b for each of the preceding components that are enabled.

Important: The RecordsManager and RecordsManagement components must be disabled, but must not be uninstalled. If you uninstall these components after installing Universal Records Manager, you will have to re-install Universal Records Manager.

6. Restart the content server instance. For further information, see Restarting Content Server (page 2-7)..

Uninstall Components

To uninstall components, follow these steps:

1. After disabling the components, you must complete the following steps to uninstall them:

   a. On the Component List screen, select the component in the Custom Components list.

   b. Select the component from the Uninstall Component drop-down menu. Uninstall the following components:

- CSCompatibility-7.5.1
- RmaPersonalization
- TableCreationCompatibility

Important: The RecordsManager and RecordsManagement components must not be uninstalled. Leave these components disabled.

   c. Click **Uninstall**

   d. Click **OK** to confirm your selection.

   e. When the component has been uninstalled, click the link to return to the Component Manager.

   f. Repeat steps b through e for each of the preceding components to be uninstalled.

2. Restart the content server instance. For further information, see Restarting Content Server (page 2-7)..

3. Continue with Installing Universal Records Manager (page 2-1).

UPGRADING FROM VERSION 7.1.4 (URM OR PCM)

If you are upgrading from Universal Records Manager or Physical Content Manager version 7.1.4, several components must be removed before installing Universal Records Management 10gR3 or they will conflict with the updated components. Complete the following steps prior to installing URM:

Disable Components

To disable components, follow these steps:

1. Open a new browser window and log into Content Server as a system administrator.

2. Click the **Admin Server** link from the Administration tray.

3. On the Content Admin Server page, click the button of the content server instance where you want to install the Universal Records Management software.

   The status page for the content server instance is displayed.

4. In the option list for the server instance, click the **Component Manager** link.

5. The Component Manager page is displayed.

     a. Select the component in the Custom Components list. Disable the following components:

- RmaPersonalization
- LayoutManagerPatch75
- TableCreationCompatibility
- CSCompatibility-7.5.1

     b. Click **Disable**.

     c. Repeat steps a and b for each of the preceding components that are enabled.

6. Restart the content server instance. For further information, see Restarting Content Server (page 2-7)..

Uninstall Components

To uninstall components, follow these steps:

1. After disabling the components, you must complete the following steps to uninstall them:

     a. On the Component List screen, select the component in the Custom Components list.

     b. Select the component from the Uninstall Component drop-down menu. Uninstall the following components:

- RmaPersonalization
- LayoutManagerPatch75
- TableCreationCompatibility
- CSCompatibility-7.5.1

     c. Click **Uninstall**

     d. Click **OK** to confirm your selection.

     e. When the component has been uninstalled, click the link to return to the Component Manager.

     f. Repeat steps b through e for each of the preceding components to be uninstalled.

2. Restart the content server instance. For further information, see Restarting Content Server (page 2-7)..

3. Continue with Installing Universal Records Manager (page 2-1).

UNINSTALLING UNIVERSAL RECORDS MANAGER

OVERVIEW

Uninstalling the Universal Records Manager software consists of the following steps:

1. Determining the components to be uninstalled (page 4-1)

2. Uninstalling the Universal Records Manager components in either of two ways:

   ❖ Uninstalling With Component Manager (page 4-3)

   ❖ Uninstalling With Component Wizard (page 4-4)

3. Perform any post-installation steps. See Post-Uninstallation Steps (page 4-5) for details.

COMPONENTS TO BE UNINSTALLED

Universal Records Manager

Depending on the options selected during the Universal Records Manager installation, the following components might need to be uninstalled:

- UniversalRecordsManager

- RecordsManagement

- ReportMaker

- UIEnhancements

- RmaEmail
- RmaHelp
- SearchAndTag
- AdvancedOptionsLists
- RelatedContent
- PopUpCalendar
- YahooUserInterfaceLibrary
- ExternalHelper
- FileResultSetComponent
- ChargeBacks
- ClassifiedEnhancements
- DoDConfig

Please note the following:

❖ You should not uninstall the ComponentDBInstall and TableCreationCompatibility components because other components might be dependent on them.

❖ The ClassifiedEnhancements component must be uninstalled *before* the RecordsManagement component.

❖ Disable all components to be uninstalled, restart the content server, then uninstall them.

❖ The procedures in this section assume you installed all components.

Physical Content Manager

If the Physical Content Manager option was selected during installation, the following components may need to be uninstalled:

- PhysicalContentManager
- PriorityContentBasket (optional; see note below)
- FieldFormatTemplate
- ZipRenditionManagement
- Barcode
- PcmHelp
- StorageCreationUtility

Note: If you are running Image Manager and/or Video Manager on the same computer as Physical Content Manager, you may choose to leave the PriorityContentBasket component on the system. Image Manager and Video Manager will then continue to use this component for their content basket functionality. If you decide to remove it, make sure that you enable the original ContentBasket component again. Otherwise, no content basket functionality is available in Image Manager and Video Manager.

UNINSTALLING WITH COMPONENT MANAGER

To uninstall Universal Records Manager components using Component Manager, complete the following steps:

1. Open a new browser window and log into Content Server as a system administrator.

2. Go to the Administration Applets page and click the **Admin Server** link.

3. On the Content Admin Server page, click the button of the content server instance where you want to uninstall the Universal Records Manager components.

   The status page for the content server instance is displayed.

4. In the option list for the server instance, click the **Component Manager** link.

   The Component Manager page is displayed.

5. Disable the Universal Records Manager components that you want to uninstall (see Components To Be Uninstalled (page 4-1)):

   a. Select the component in the Enabled Components list.

   b. Click the **Disable** button to move it to the Disabled Components list.

Important: Make sure that you uninstall the ClassifiedEnhancements component *before* the RecordsManagement component. If you do not, errors may be reported after you restart the content server.

6. After disabling the last component, click the Start/Stop Content Server link on the Component Manager page.

7. Click the restart icon ( ) to restart the content server instance.

8. In the option list for the server instance, click the **Component Manager** link to return to the Component Manger page.

9. In the Uninstall Component list, select a disabled component and click **Uninstall**.

10. A prompt is displayed asking you to confirm the uninstallation process. Click **OK** to confirm.

11. After the component has been uninstalled, a message is displayed stating that the component was uninstalled successfully.

12. Click the link to return to Component Manager.

13. Repeat steps 9–12 for each Universal Records Manager component that you want to uninstall.

14. After uninstalling the last component, click the Start/Stop Content Server link on the Component Manager page.

15. Click the restart icon ( ) to restart the content server instance.

After the Universal Records Manager components have been uninstalled, the custom metadata fields installed with URM remain in the Content Server database but are not visible in the user interface.

UNINSTALLING WITH COMPONENT WIZARD

To uninstall Universal Records Manager components using Component Wizard, complete the following steps:

1. Start Component Wizard:
   - ❖ In Windows, choose **Start—Programs—Content Server—<instance>—Utilities—Component Wizard**.
   - ❖ In UNIX, navigate to the *<install_dir>/bin* directory. At the command prompt, type `ComponentWizard`.

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

2. In the Custom Components list, select the Universal Records Manager component that you want to uninstall (see Components To Be Uninstalled (page 4-1)), and click **Disable**. Repeat this step to disable all components.

3. After disabling the last component, restart the content server (see Restarting Content Server (page 2-7)).

Important: Make sure that you uninstall the ClassifiedEnhancements component *before* the RecordsManagement component. If you do not, errors may be reported after you restart the content server.

4. In the Component Wizard Custom Components list, select a disabled component and click **Uninstall**.

5. You are prompted to confirm uninstalling the component. Click **Yes**.

    The Uninstall dialog is displayed.

6. Click **OK**.

    The component files are removed, and the Custom Component list is displayed again.

7. Repeat steps 4–6 for each Universal Records Manager component that you want to uninstall.

8. After uninstalling the last component, exit the Component Wizard and restart the content server (see Restarting Content Server (page 2-7)).

After the Universal Records Manager components have been uninstalled, the custom metadata fields installed with URM remain in the Content Server database but are not visible in the user interface.

POST-UNINSTALLATION STEPS

After the DoD Edition components have been uninstalled, the metadata fields remain in the Content Server user interface. If you want to disable or delete the fields, you can use Content Server's Configuration Manager utility. Disabling the fields hides the fields on the user interface while deleting the fields deletes the fields from the user interface, the database tables, and the search index. To see an overview of all metadata fields related to records management, see Appendix B (*Universal Records Manager Metadata Fields*).

Disabling DoD Edition Fields

To disable DoD Edition fields, complete the following steps:

Note: You must disable the DoD Edition Fields through the Configuration Manager utility instead of the Admin Server Applet in the Content Server.

1. Start Configuration Manager:

    ❖ In Windows, choose **Start—Programs—Content Server—*<install_dir>*—Configuration Manager**.

    ❖ In UNIX, navigate to the *<install_dir>*/bin directory, where *<install_dir>* refers to the Content Server installation directory. At the command prompt, type `ConfigurationManager`.

The Configuration Manager applet is displayed.

2. Open the Information Fields tab.

   The Field Info box lists all of the custom information fields.

3. Select a field you want to disable and click **Edit**.

   The Edit Custom Info field is displayed.

4. Clear the **Enable on User Interface** check box and click **OK**. The Enabled column in the Field Info list now displays "No." You must disable the fields one field at a time. Repeat steps 3 and 4 for each field you want to disable.

5. When you complete disabling the information fields, click **Update Database Design**. You may need to rebuild your search engine. If necessary, the Rebuild Search Index button becomes available.

6. Click **Rebuild Search Index**. When the rebuild completes, close the Configuration Manager applet and restart the Content Server.

Caution: Rebuilding the search index may be a very time-consuming process, depending on the number of content items managed by your content server instance. It is therefore recommended that you rebuild the index during off-peak hours of Content Server use, which is typically at night or on a weekend.

Deleting DoD Edition Fields

To delete DoD Edition fields from the database, complete the following steps:

1. Start Configuration Manager:

   ❖ In Windows, choose **Start—Programs—Content Server—*<install_dir>*—Configuration Manager**.

   ❖ In UNIX, navigate to the *<install_dir>*/bin directory, where *<install_dir>* refers to the Content Server installation directory. At the command prompt, type ConfigurationManager.

   The Configuration Manager applet is displayed.

2. Open the Information Fields tab.

   The Field Info box lists all of the custom information fields.

3. Select a field you want to delete and click **Delete**. You must delete the fields one field at a time.

4. When you complete deleting the information fields, click **Update Database Design**. When the update is complete, the Rebuild Search Index button becomes available.

5. Click **Rebuild Search Index**. When the rebuild completes, close the Configuration Manager applet and restart the content server.

Caution: Rebuilding the search index may be a very time-consuming process, depending on the number of content items managed by your content server instance. It is therefore recommended that you rebuild the index during off-peak hours of Content Server use, which is typically at night or on a weekend.

INSTALLATION DETAILS

OVERVIEW

This appendix covers the following topics:

❖ Universal Records Manager Components (page A-1)

❖ Physical Content Manager Components (page A-3)

❖ Installation Options (page A-3)

All components are stored in the *<install_dir>/custom/* directory unless otherwise noted.

UNIVERSAL RECORDS MANAGER COMPONENTS

When you install the Universal Records Manager software, the following main components are always installed:

❖ UniversalRecordsManager: A container component which includes the other components used in Universal Records Manager.

❖ CommonUtilitiesBundle: A container component which includes components required for Universal Records Manager.

❖ CustomSecurityRights: Used to manage Record Manager rights and rights used in other components.

❖ ExternalHelper: Provides services for adapters to register, declare, update, or delete physical and external items. In addition, through adapters it also applies other records

and retention tasks such as freezing, unfreezing, and disposition of physical and external items that reside outside of the URM server.

❖ RecordsManagement: The master component for Records Manager. It includes metadata editors for categories and records folders.

❖ ReportMaker: Used to generate audit trail reports, user group reports, and retention schedule reports in a number of available formats.

❖ UIEnhancements: Provides a number of enhancements for the Content Server user interface related to Universal Records Manager.

❖ RmaHelp: Includes the cross-platform HTML help system and PDF versions of the system administration and user guides. The PDF guides can be accessed from within each page of their corresponding help system.

❖ ComponentDBInstall: Takes care of creating, altering, and deleting the required component database tables, and also loads database column translations for Oracle.

❖ TableCreationCompatibility: Used by other components to paint result set lists, such as a folder lists or search results lists, and uses HTML tables to display the lists.

❖ Advanced Options List: Used to provide increased functionality when creating option lists.

❖ Related Content: Provides the functionality for linking records. For further information about links, see the *Records Manager DoD Edition System Setup Guide*.

❖ FileResultSetComponent: Used to stream large resultsets to the file system instead of storing them in memory.

❖ SearchAndTag: Used to provide the search and update functionality used with screening and searching.

❖ RmaE-Mail: Allows automatic capturing of e-mail information. It is used in conjunction with Outlook Integration.

Important: Do not disable any of these components as long as Universal Records Manager is installed. Otherwise Universal Records Manager will cease to function correctly.

In addition to these mandatory components, one or more other components might be installed depending on the Installation Options (page A-3) you select.

Important: If you are upgrading from Physical Content Manager or Records Manager, you might need to disable or uninstall components that conflict with Universal Records Manager components. For details, see Chapter 2 (*Installing Universal Records Manager)*.

PHYSICAL CONTENT MANAGER COMPONENTS

When you install the PCM software, the following main components are always installed:

❖ PhysicalContentManager: Used to provide warehouse and reservation functionality for PCM.

❖ PriorityContentBasket: Used to provide enhanced content basket functionality.

Important: If you are using Image Manager and/or Video Manager on the same computer as Physical Content Manager, make sure that you disable Image/Video Manager's content basket component (ContentBasket).

❖ FieldFormatTemplate: Used to validate the barcode field on the create/edit pages for storage objects and physical items.

❖ ZipRenditionManagement: Allows user to download items in the content basket in a single zip file.

❖ Barcode: Used to upload barcode files to the content server.

❖ PcmHelp: Used to install the Physical Content Manager help system and PDF files.

❖ StorageCreationUtility : Used to define physical storage space as a batch. This enables you to easily create structured storage space without having to define each storage location individually.

Important: Do not disable any of these components as long as Physical Content Manager is installed. Universal Records Manager will cease to function correctly.

INSTALLATION OPTIONS

During the installation of the software, you are prompted to enable or disable a number of installation options:

❖ Related Content (page A-4)

❖ Classified Enhancements (page A-4)

❖ Physical Content Manager (page A-4)

❖ DoD Configuration (page A-5)

Related Content

If this installation option is selected, the RelatedContent component is installed. This component provides functionality for linking records. For further information about links, see the *Records Manager DoD Edition System Administration Guide*.

For new installations, this option is enabled by default. For upgrades, it is set in accordance with the option selection of the previous installation.

Classified Enhancements

If you select this installation option, the ClassifiedEnhancements component is installed. This component provides a number of enhancements to the records management environment related to the classified records (in accordance with Chapter 4 of the DoD 5015.2 standard).

Important: Universal Records Manager 10gR3 has been certified to comply with Chapter 4 of the DoD 5015.2 standard (classified records). If you intend to use this functionality, make sure that you enable the Classified Enhancements installation option.

Important: It is recommended that you do not enable the Classified Enhancements setting during an upgrade if it was previously disabled. If you enable it, records that are already checked in may not have values for some metadata fields that are required for classified security to work correctly. This may cause their processing to fail unless the required metadata fields of these content items are populated.

The ClassifiedEnhancements component is installed in the following location: *<install_dir>*/custom/ClassifiedEnhancements.

Physical Content Manager

This optional component extends this capability to physical records and non-record content that are not stored in the content server in electronic form. All items—both internal and external, regardless of their source or format—are managed in a single, consistent, manageable infrastructure using one central application and a single user interface. The same file plan and retention schedules are used for both electronic (internal) and physical (external) records and non-record content. Physical Content Manager keeps track of the storage locations and retention schedules of the physical records and content.

DoD Configuration

If you select this installation option, the RmaPersonalization is installed and the Author/Originator custom metadata field is made a mandatory field. These were separate options in previous version of this product.

DoD Personalization

The personalization component enables users to personalize their search results, check-in form, and content information pages. For further information about personalization, see the *Records Manager DoD Edition User Guide*.

The RmaPersonalization component is installed in the following location: *<install_dir>*/custom/RmaPersonalization.

Important: Always make sure that the RmaPersonalization component is listed *after* the RecordsManagement component in the list of enabled components in Component Manager. If it is not, error messages may be displayed (for example, during screening for records). On the initial installation of Universal Records Manager, the RmaPersonalization component will be installed correctly, but the component order may be compromised if you disable components and then re-enable them again in the wrong order. If that happens, you should simply disable the RmaPersonalization component and re-enable it. This will correct the component order.

Make Author/Originator Required

If DoD Configuration is selected, the Author/Originator custom metadata field becomes a mandatory field in Universal Records Manager—in other words, a record or content item can only be checked in if a value is specified for this field. This installation option makes the system in strict compliance with the DoD 5015 test requirements.

If you enable this option, issues may arise with other applications that you may want to install on the content server (for example, Sarbanes-Oxley and Site Studio), since these applications submit content without that field.

Note: Even without the Author/Originator metadata field being mandatory, your Universal Records Manager instance fully meets the requirements of the DoD 5015 specification.

For new installations, the DoD Configuration option is disabled by default which means the Author/Originator field is not mandatory. For upgrades, it is set in accordance with the option selection of the previous installation.

Important: It is recommended that you do not modify the Make Author/Originator Required Field setting during upgrades. If you do, processing of certain items may fail since they may no longer meet the requirements for the processing action. For example, if you initially set the field to not be mandatory, the field value for an item may be empty. If you then make it a required field later, processing of that item may fail since the field has no value while it should.

B

UNIVERSAL RECORDS MANAGER METADATA FIELDS

CUSTOM METADATA FIELDS

This section lists the metadata fields created by the Universal Records Manager components. You can view the field definitions using the Configuration Manager utility.

Note: The metadata fields will vary depending on the options chosen during installation.

Table B-1   Metadata fields

Information Field Name	Field Type	Default Field Caption String
AuditPeriod	Text	Audit
CategoryID	Long Text	Category ID
ClassificationGuideRemarks	Text	Classification Guide Remarks
ClassificationReason	Long Text	Reason(s) for Classification
ClassifiedBy	Text	Classified by
ClassifiedDerivedFrom	Text	Classification Derived From
ClassifiedDerivedFromTopic	Text	Derived from topic

Information Field Name	Field Type	Default Field Caption String
ClassifiedMarkings	Long Text	Current Classification
ClassifyingAgency	Long Text	Classifying Agency
DeclassifiedDate	Date	Actual Declassified Date
DeclassifyExemptionCategory	Long Text	Declassify Exemption Category
DeclassifyOnDate	Date	Declassify on Date
DeclassifyOnEventDescription	Long Text	Declassify on event
DeleteApproveDate	Date	Delete Approve Date
DistributionList	Text	Distribution List
DowngradeInstructions	Long Text	Downgrade Instructions
DowngradeOnDate	Date	Downgrade on Date
DowngradeOnEventDescription	Long Text	Downgrade on Event
EmailCC	Memo	Other Addressee(s)
EmailFrom	Text	Author Or Originator
Emailid	Text	Email ID
EmailSubject	Long Text	Email Subject
EmailTo	Memo	Addressee(s)
EmailToLists	Long Text	Email To Lists
ExternalLocation	Long Text	External Location
ExternalLocation2	Long Text	External Container
FolderID	Long Text	Folder ID
FreezeID	Memo	Folder Reason
FreezeReason	Memo	Freeze Comments
HideIncludeChildFolders	Integer	Hide Include Child Folders
InitialClassification	Long Text	Initial classification

Information Field Name	Field Type	Default Field Caption String
IsCutoff	Text	Is Cutoff
IsEmailRecord	Text	Is Correspondence
IsExternal	Text	External
IsFrozen	Text	Is Frozen
IsPending	Text	Review Pending
IsRecord	Text	Is Record
IsSubjectToAudit	Text	Subject To Audit
IsVital	Text	Subject to Review
LifeCycleID	Long Text	wwLifeCycleID (string in *ww_strings.htm*: "Life Cycle")
MediaType	Text	Media Type
NewRevisionDate	Date	New Revision Date
NoLatestRevisionDate	Date	No Longer Latest Revision Date
OriginatingOrganization	Long Text	Originating Organization
PublicationDate	Date	Publication Date
ReceivedDate	Date	Received Date
RecordActivationDate	Date	Record Activation Date
RecordCancelledDate	Date	Record Cancelled Date
RecordCutoffDate	Date	Record Cutoff Date
RecordDestroyDate	Date	Record Destroy Date
RecordExpirationDate	Date	Record Expiration Date
RecordFilingDate	Date	Record Filing Date
RecordFormat	Text	Record Format
RecordObsoleteDate	Date	Record Obsolete Date

Information Field Name	Field Type	Default Field Caption String
RecordRescindedDate	Date	Record Rescinded Date
RecordReviewDate	Date	Record Review Date
RecordSupersededDate	Date	Record Superseded Date
SupersededContent	Text	Superseding Content
SupersedeFlag	Text	Supersede Flag
SuperSupersededDate	Date	Super Superseded Date
SupplementalMarkings	Long Text	Supplemental Markings
VitalPeriod	Integer	Review Period
VitalPeriodUnits	Text	Review Period Units
VitalReviewer	Text	Reviewer

Note: Universal Records Manager also creates the LifeCycleID field, however this is a virtual field that is not in the database:

- Information Field Name (virtual field)= LifeCycleID
- Field Type= Long Text
- Default Field Caption String= Life Cycle

Note: When the RmaEmail and DoDConfig components are installed and enabled, the default field caption string for the dDocAuthor predefined metadata field is changed from "Author" to "Filer".

C

INTERACTIONS WITH OTHER APPLICATIONS

OVERVIEW

This section lists the known interactions and dependencies of Universal Records Manager with other applications that may be installed on the same computer:

❖ Folders (page C-1)

❖ Content Tracker (page C-2)

❖ Image Manager (page C-2)

❖ Video Manager (page C-3)

FOLDERS

Please note the following considerations if you are running the Folders component on the same computer as Universal Records Manager:

❖ If Folders is installed and enabled, users can delete records if they have RW permission to the RecordsGroup security group (in addition to the Records.Delete right). Normally, they would need RWD permission to that security group in order to delete a record or non-record content item. This is because Folders sets the `AuthorDelete=true` parameter in its configuration file.

❖ If Folders is installed and enabled, users can download (open or save) the native file for a cut-off record. Normally, they would get a message saying that cut-off records

are read-only. This is because Folders sets the `GetCopyAccess=true` parameter in its configuration file.

CONTENT TRACKER

In order to take advantage of the Last Access metric in Content Tracker, you must be using Content Tracker version 7.6 or later. The Last Access metric tells you when an item was last accessed by a user, allowing you to determine if an item should be retained or disposed.

To use this functionality, create a custom metadata field for the Last Access Metric after Content Tracker is installed. The actual name of the field will vary depending on the name used when creating the field. For example, if you name the field LastAccess, the metadata field name will be xLastAccess. See the *Content Tracker Administration Guide* for details about creating this metadata field and using the snapshot function, which contains the Last Access Metric.

To ensure the proper retention of archived and batchloaded content, you must set the Last Access date for the import/insert. Otherwise the access date for these content items will be null and retention based on this field will fail. Make certain to choose a suitable date for the import. For example, if you are importing an archive of data from a previous year, set that year as the import date rather than use the date of the import as the name. This will provide you with more information about the content of the archive. As mentioned in the preceding paragraph, the name of the field varies depending on the name used when creating the field.

See the *Records Manager DoD Edition System Setup Guide* for information about creating a custom direct trigger and establishing a relationship between the trigger and a specific Content Date such as Last Access date.

IMAGE MANAGER

Please note the following considerations if you are running Image Manager on the same computer as Physical Content Manager:

❖ Physical Content Manager can be used in conjunction with Oracle Image Manager, but only if Image Manager's content basket component (ContentBasket) is disabled. Please note that Image Manager will not lose any of its content basket functionaliry as it will automatically start to use Physical Content Manager's content basket component (PriorityContentBasket), including the new order priority feature.

VIDEO MANAGER

Please note the following considerations if you are running Video Manager on the same computer as Physical Content Manager:

❖ Physical Content Manager can be used in conjunction with Oracle Video Manager, but only if Video Manager's content basket component (ContentBasket) is disabled. Please note that Video Manager will not lose any of its content basket functionaliry as it will automatically start to use Physical Content Manager's content basket component (PriorityContentBasket), including the new order priority feature.

D

FEDERATED SEARCHES AND FREEZES

OVERVIEW

As part of a discovery process, organizations might need to search for or freeze content across multiple repositories. URM uses external adapters to search metadata and full text of remote repository items.

URM enables you to:

❖ Schedule searches by sending the search criteria to adapters. External adapters check periodically to see if there are searches pending, perform the searches, and return the search results to URM. The adapters may perform the search in a delayed timeline, requiring users to wait for the search results to complete.

❖ Freeze the content returned from a completed scheduled search. While scheduled freezes are initiated immediately, URM performs the freeze in the background.

❖ View detailed information about a scheduled search or freeze.

❖ View search or freeze results.

❖ Delete a scheduled search or freeze.

This section covers the following topics:

FEDERATE SEARCH

Access the Federated Search Query Builder by clicking **URM Search —Remote Repositories** in the External Content tray. Please note the following options in the URM Search menu:

- **Catalog Search** is used for external content already checked into URM. This is a search of local metadata, and is usually a faster search than Remote Repository items.

- **Remote Repositories** is used for items that are located on external content systems. 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.

Note: Federated Search adds functionality to the Search Query Builder Form used in Content Server. Refer to the Content Server User Guide for additional help using the Search Query Builder.

The Federated Search Query Builder Form enables you to build and schedule seach queries across all repositories. Choose the content repositories to include in the search by selecting the sources in the **External Sources** drop-down list. You may select multiple sources in your search, if applicable.

Federated Searches Page

When you press **Search**, you are prompted for the name of this Federated Search. The search is scheduled and the Federated Searches Page appears. The list of scheduled searches includes the number of external sources requested in the search, and number of external sources that have completed the search request.

The search is scheduled and will wait for the external search adapters to send results back to URM.

To return to the Federated Searches Page, choose **Configure Records Management** from the Administration tray. From the Configure Records Management Page, select **Tasks — Scheduled —Federated Searches.**

Federated Search Actions

Clicking theActions icon ▣ displays the Federated Search action pop-up menu. The menu options include:

❖ **Show Search Results** —displays the result for the selected search. If multiple external sources were selected in the search, the Search Results page will organize the results by external source. Within the Search Results page, you may view the search results for individual external sources.

❖ **Show Search Details**—displays the details for the selected search. Within the Search Details page, you may view the search results for individual external sources, freeze the search results, download the files returned for the search, and create a similar search.

Note: You may freeze items in the returned search results per external source. If multiple external sources have been defined in the serach, but have not all returned results, you may schedule a freeze on the sources that have returned results for the scheduled search.

❖ **Create Similar Search**—displays the Federated Search Query Builder Form, prepopulated with search critera used in the selected search. You may modify or add criteria to schedule a new search.

❖ **Delete Search**—delete the selected scheduled search. All results returned for the search will be deleted, and any pending search results will be ignored.

FEDERATED FREEZE

Freezing a content item inhibits disposition processing. This may be necessary to comply with legal or audit requirements (for example, as a result of litigation). In addition, metadata for the item is also frozen.

Note: Federated Freeze adds functionality to content freezing used in Records Manager. Refer to the Records Manager Administration Guide for additional information about Freezes.

To Freeze external content, you must first schedule a Federated Search, then run a Federated Freeze on the returned results. URM performs the freeze in the background and updates the status.

Scheduled Federated Search Freeze Page

You can use Federated Search to Freeze external content using Universal Records Manager. Access the Federated Freeze page by selecting **Configure Records Management** from the Administration tray. From the Configure Records Management page, select **Tasks —Scheduled —Federated Freezes.**

Frozen Federated Search Content is displayed for review or further action. The list of frozen scheduled searches includes the external source of the frozen conten, and the status (scheduled, completed or errors) of the freeze.

Federated Freeze Actions

Clicking the Actions icon displays the Federated Search Freeze action pop-up menu. The menu options include:

❖ **Show Freeze Errors** —displays the items with errors during the selected freeze. Freeze errors may occur if the checked-in items from the Federated Search do not have all required fields defined or if the items do not pass validation.

❖ **Refreeze Errors**—reschedules the freeze for the error items in the selected search task.

❖ **Delete Freeze**—deletes the selected freeze.

E

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OVERVIEW

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ZLIB LICENSE

* zlib.h -- interface of the 'zlib' general purpose compression library

  version 1.2.3, July 18th, 2005

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V

Video Manager, 2-2, C-3