

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

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ORACLE®

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

1.1 Overview

This section contains the following topics:

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

1.2 About the guide

This guide provides instructions on how to install FileSystem Adapter on a computer running either Microsoft Windows or Linux.

Note: The information contained in this document is subject to change as the product technology evolves and as hardware, operating systems, and third-party software are created and modified.

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

1.2.1 Audience

This guide is intended for system administrators who need to run and configure FileSystem adapter.

1.2.2 Conventions

The following conventions are used throughout this guide:

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

1.3 About Universal Record Manager (URM):

Oracle Universal Records Manager (URM) provides the ability to perform records management, retention management and litigation support across the entire enterprise. From a single Oracle URM server, organizations can define all their policies for records and retention management, as well as perform legal searches and apply litigation holds.

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

1.4 Software Requirements

1.4.1 Supported Databases

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

1.4.2 Compatibility with URM and Content Server

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

1.4.3 Oracle Secure Enterprise Search (10.1.8.2)

The correct version of OSES is required to be installed.

1.4.4 Optional Hardware Requirements

Installation of URM Adapter requires 1 GB RAM.

2 Installing Oracle URM Adapter for FileSystem

2.1 Overview

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

The Oracle URM Adapter for FileSystem obtains all policies from the URM server and applies them to the content items stored at the FileSystem end. The Adapter provides the bridge between URM which manages the retention policies and FileSystem stores the content. The Adapter also sends information back to the URM server so it can maintain an up-to-date catalog of the enterprise's important Content. Thus, companies can apply their records and retention policies to content more consistently with less administrative effort and less disruption for users.

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

2.2 Pre-Installation Tasks and Considerations

Before installing Oracle URM Adapter for FileSystem the following steps (prerequisites) need to be completed:

2.2.1 Steps to set the environment for FileSystem Adapter

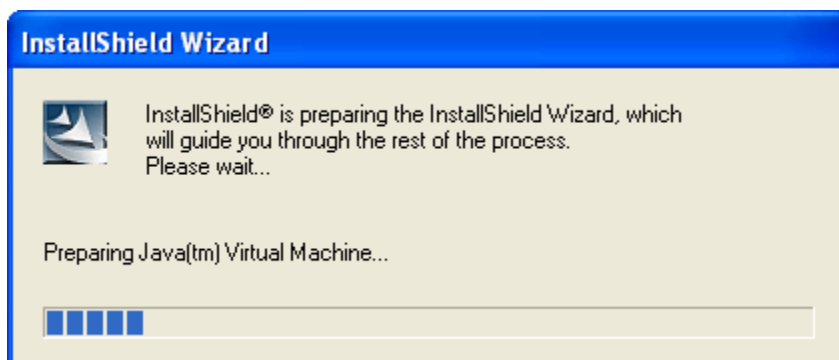
- JDK 1.5 should be installed.
- OSES (10.1.8.2) should be installed

2.2.2 Installing the Adapter files

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

For Windows Machine:

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



For Linux Machine:

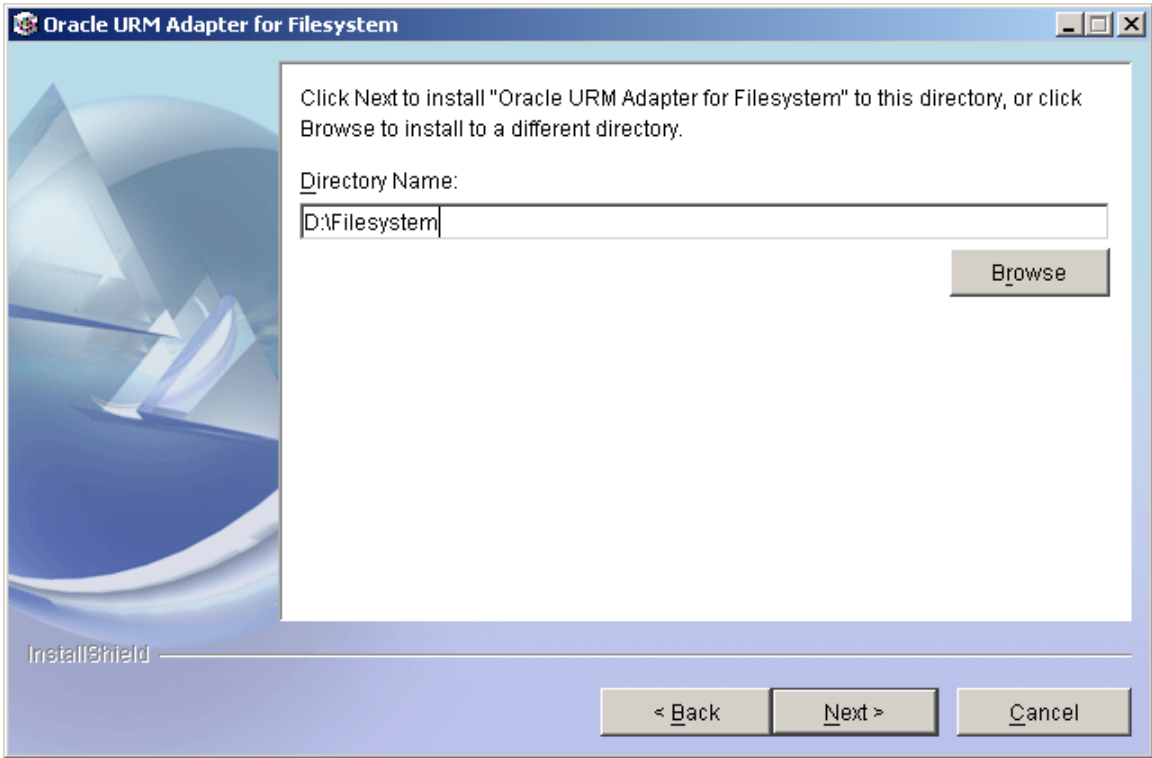
- The provided bin file FilesystemAdapter has to be run. Navigate to the location where the bin file is located.
- Type the following command to run the installer
“./<filename>.bin “

E.g.: ./FilesystemAdapter.bin

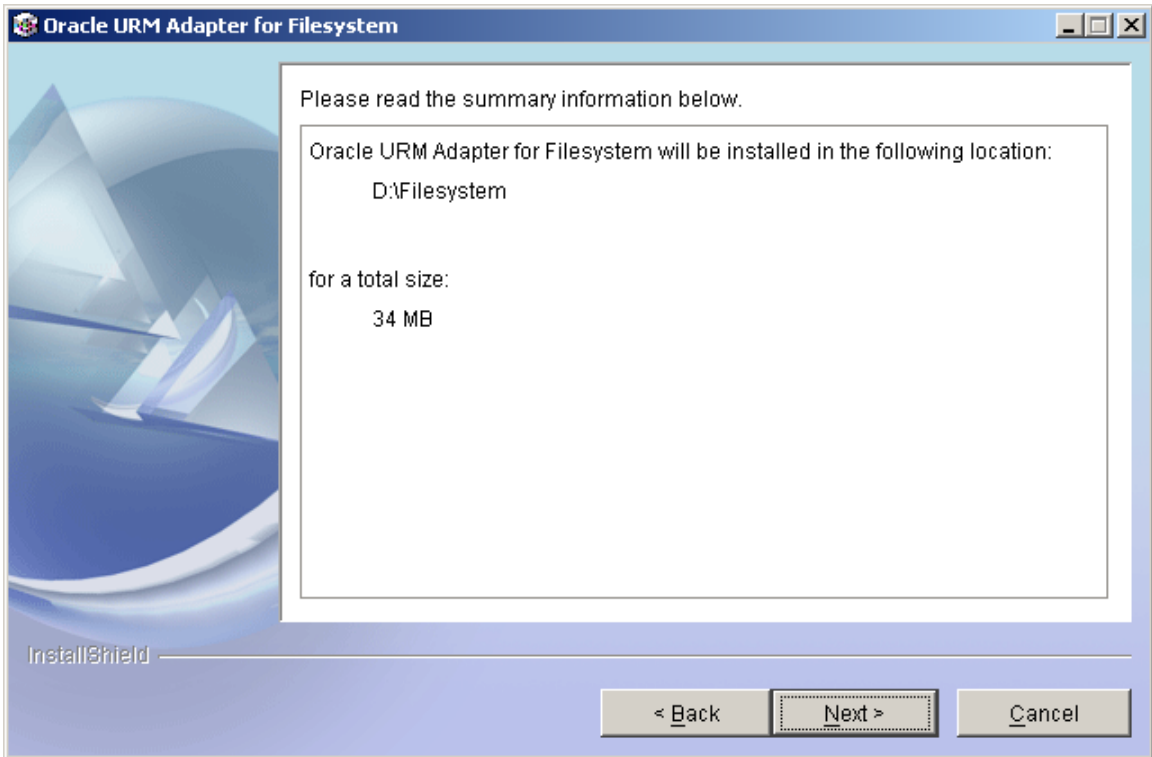
- Click on the “Next” button to start with the installation steps



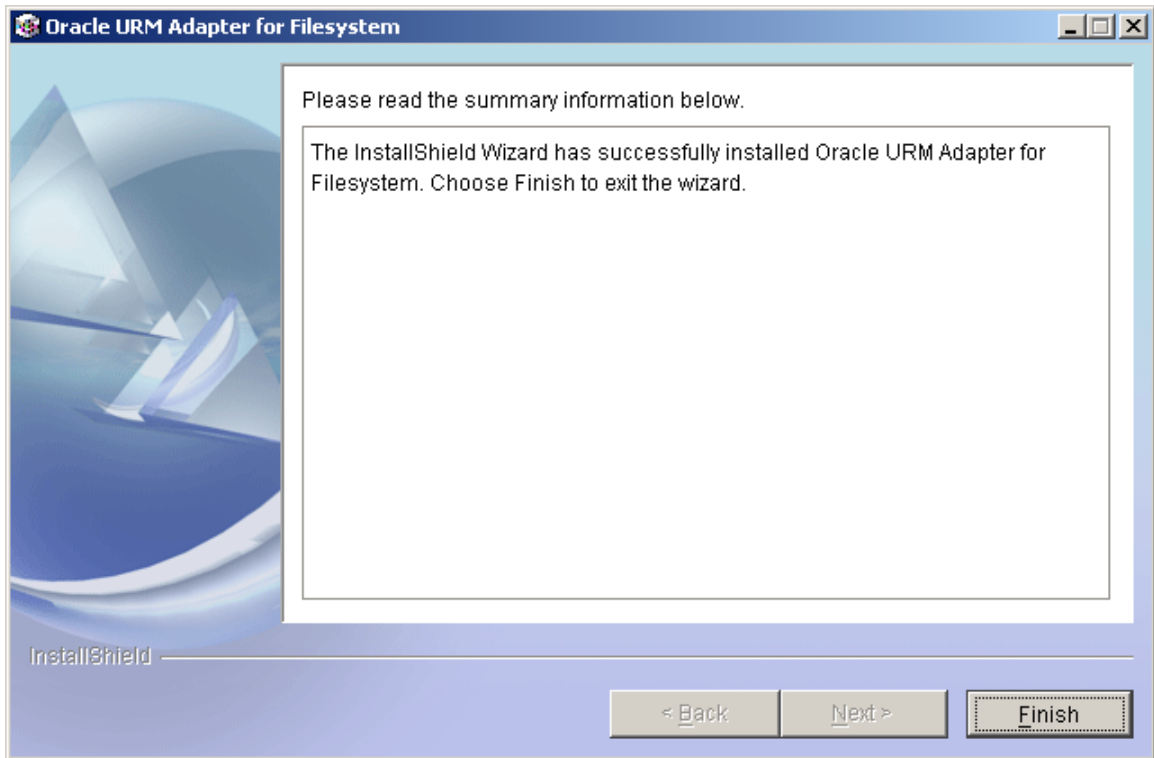
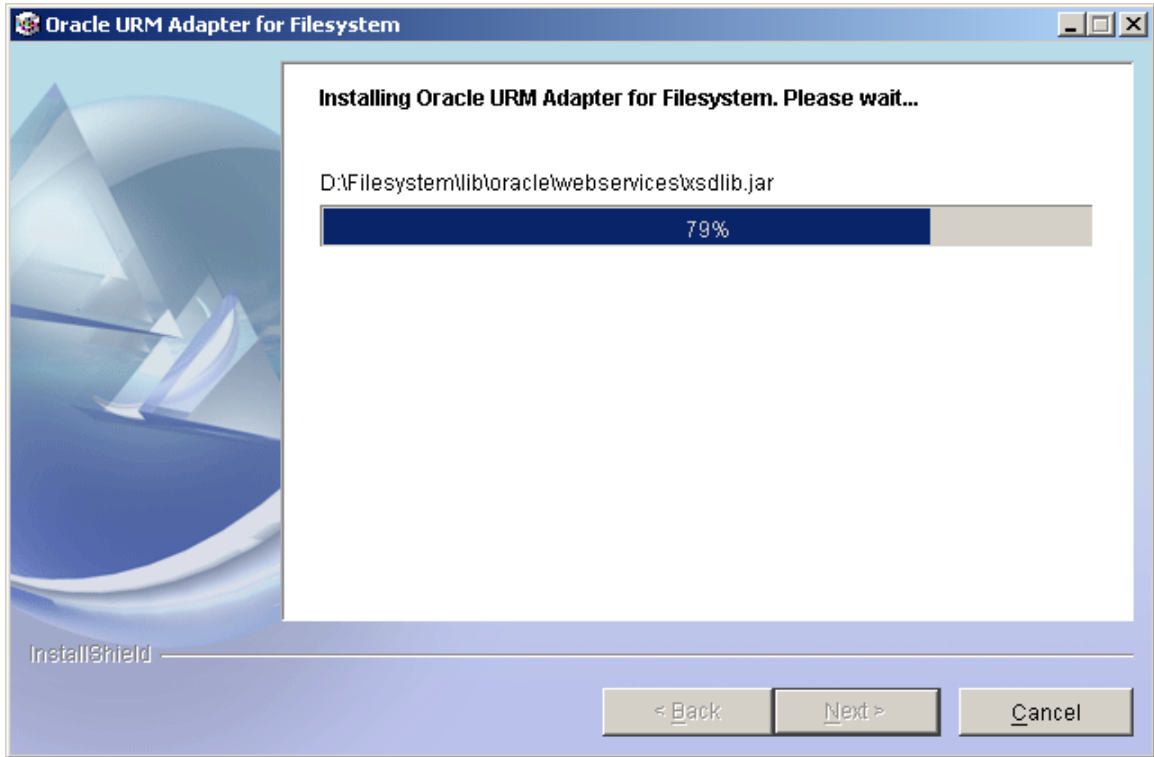
- Browse to the directory where the installer needs to be installed and click next.



- o A summary is provided as shown below. Click next.



- o The dialog box will show the progress as the Adapter is installed.



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



Note: If user wants to uninstall the files from the folder. Click on the `uninstaller.exe` in the `_uninst` folder.

2.3 Post-Installation Tasks and Considerations

2.3.1 Database setup for URM

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

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

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

2.3.2 Update the OSES custom fields in config.properties file

If there are some custom fields configured in OSES, then user needs to add these fields in "`CUSTOM_ATTRIBUTES`" key existing in the `config.properties` file present in the installed directory.

e.g `CUSTOM_ATTRIBUTES= URMCrwlDateGMT, CustomAttribute1, CustomAttribute2`

2.3.3 Steps for installation of OSES crawl time plug-in

2.3.3.1 Create a folder "URMCrawlTimePlugin" in OSES root directory (`$ORACLE_HOME \search\lib\plugins\doc` directory).

2.3.3.2 Place the "URMCrawlTimePlugin.jar" in the "URMCrawlTimePlugin" folder from the "URMCrawlTimePlugin" folder of the Filesystem Adapter installed directory.

2.3.3.3 Login to the OSES admin tool and goto the Global Settings tab.

2.3.3.4 Click on the Document Services Link.

2.3.3.5 Click on the “Create” button for Document Services.

The screenshot shows the Oracle Secure Enterprise Search Administration web interface. The browser title is "Oracle Secure Enterprise Search Administration : Document Services : User-Defined : Manage Docu - Microsoft Internet Explorer". The address bar shows "http://10.113.56.127:7777/search/admin/sources/doc_service_list.jsp". The page header includes "ORACLE Secure Enterprise Search" and navigation links for "Home", "Search", and "Global Settings".

The main content area is titled "Global Settings" and contains two sections:

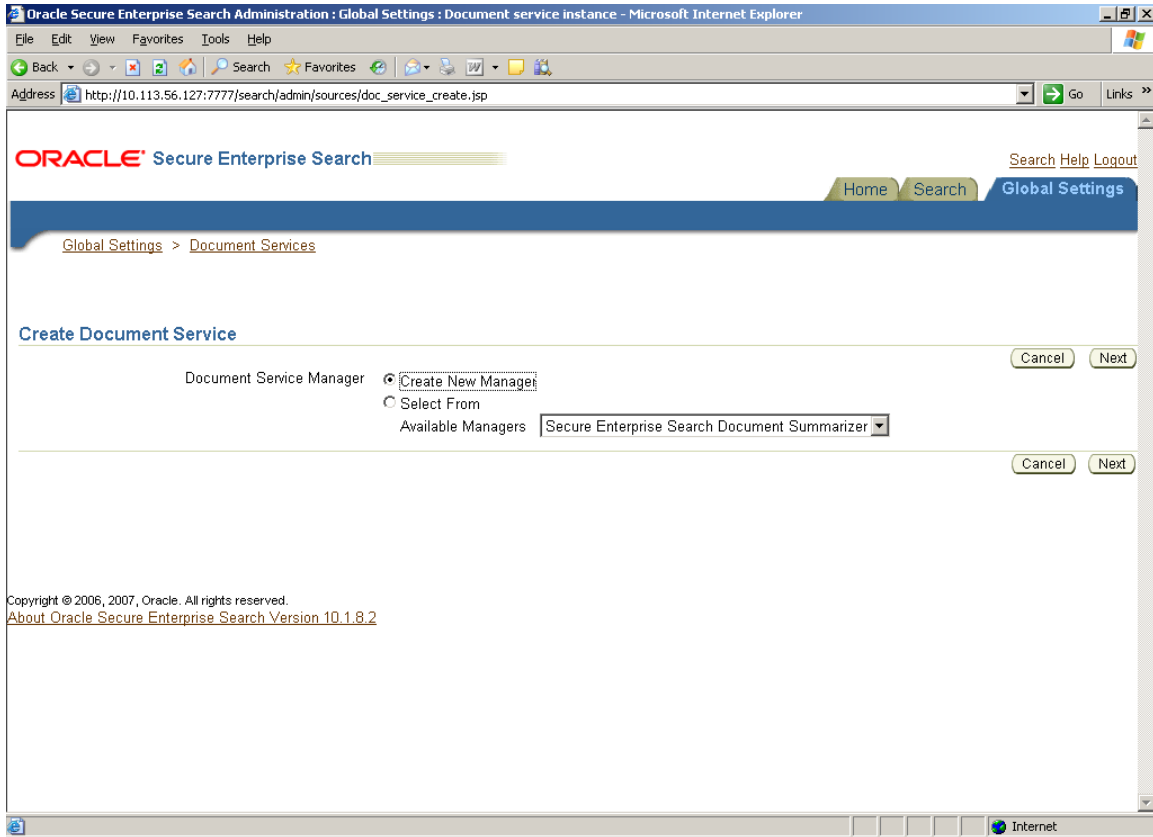
- Document Services**: This section lists all document services. It includes a "Create" button and "Expand All" / "Collapse All" links. A table lists the following services:

| Focus Name | Description | Edit | Delete |
|--|---|------|--------|
| Service Managers | | | |
| Secure Enterprise Search Document Summarizer | Service that extracts the most significant phrases and sentences for the document | | |
| URM Crawl Time | URM Crawl Time Attribute Plugin | | |
- Document Service Pipelines**: This section lists all document service pipelines. It includes a "Create" button. A table lists the following pipelines:

| Name | Description | Assigned Sources | Edit | Delete |
|------------------|-----------------------------------|----------------------------|------|--------|
| Default pipeline | Default document service pipeline | | | |
| newpipe | new | TestSource, source, global | | |

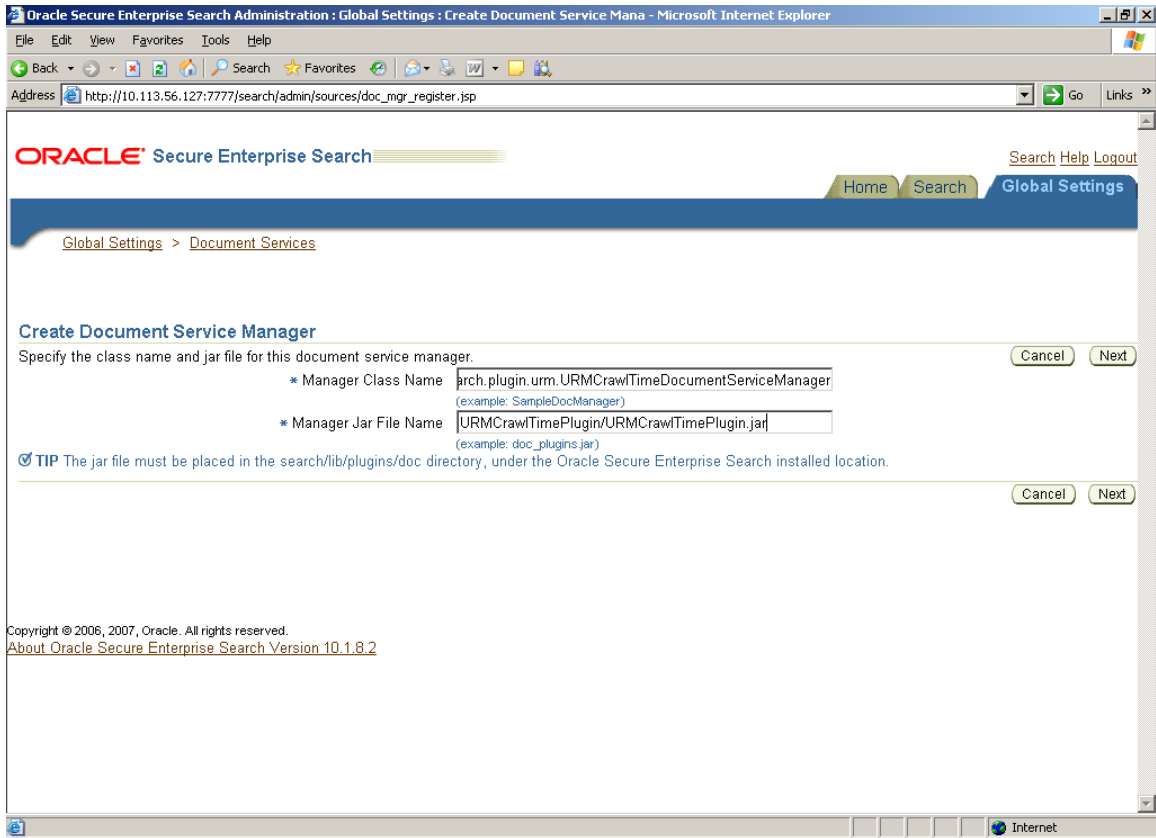
The status bar at the bottom shows "Done" and "Internet".

2.3.3.6 Click the radio button for Create New Manager and click the Next Button

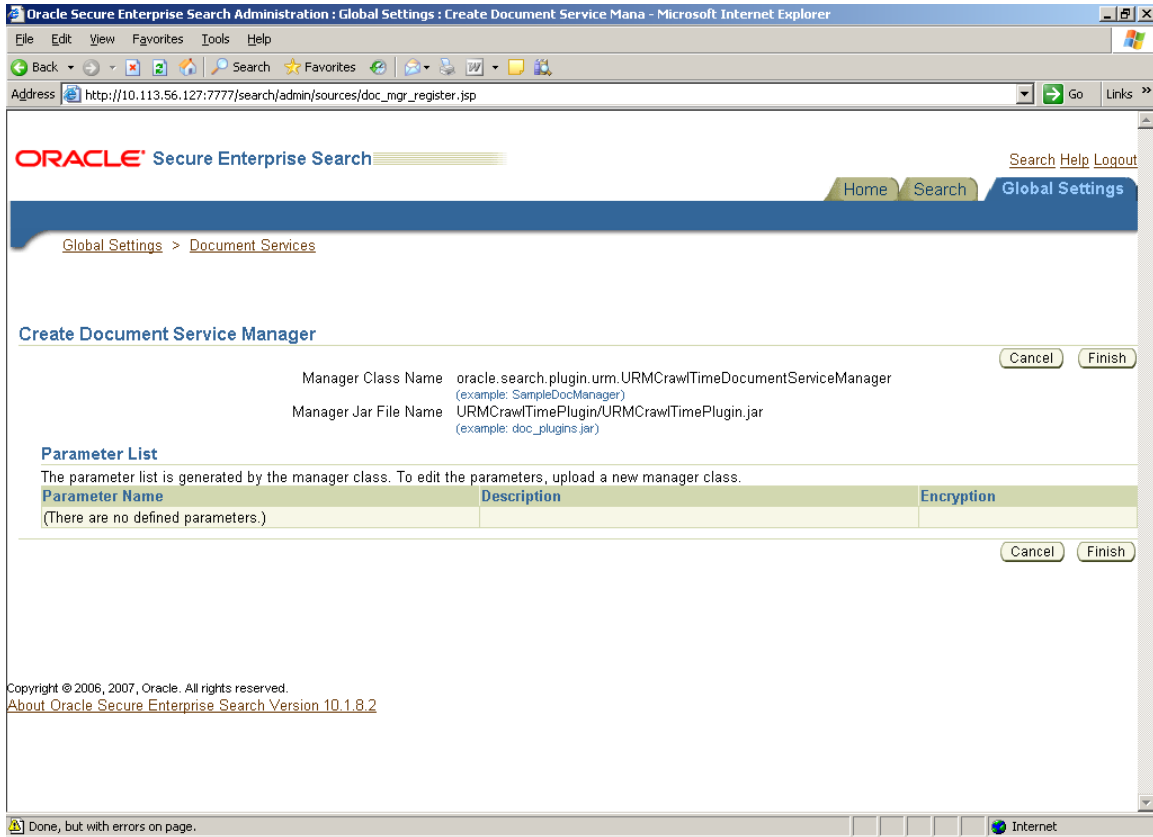


2.3.3.7 Create Document Service Manager:

- In the “Manager Class Name” field enter the following value:
oracle.search.plugin.urm.URMCrawlTimeDocumentServiceManager
- In the “Manger Jar File Name” field enter the following value:
URMCrawlTimePlugin/URMCrawlTimePlugin.jar
- Click on the “Next” Button



2.3.3.8 Click on the “Finish” Button



2.3.3.9 URM Crawl Time Manager should be registered

The screenshot shows the Oracle Secure Enterprise Search Administration interface in a Microsoft Internet Explorer browser window. The address bar shows the URL: `http://10.113.56.127:7777/search/admin/sources/doc_service_list.jsp`. The page title is "Oracle Secure Enterprise Search Administration : Document Services : User-Defined : Manage Docu".

The interface includes a navigation bar with "Home", "Search", and "Global Settings" tabs. The "Global Settings" tab is active. Below the navigation bar, there is a "Global Settings" link.

The main content area is titled "Document Services". It contains the text: "This section lists all document services. You can create as many new document services as you want." and a "Create" button. Below this text are links for "Expand All" and "Collapse All".

The "Document Services" table is as follows:

| Focus Name | Description | Edit | Delete |
|--|---|------|--------|
| Service Managers | | | |
| Secure Enterprise Search Document Summarizer | Service that extracts the most significant phrases and sentences for the document | | |
| URM Crawl Time | URM Crawl Time Attribute Plugin | | |

Below the "Document Services" table is the "Document Service Pipelines" section. It contains the text: "This section lists all document service pipelines. You can create as many new document service pipelines as you want." and a "Create" button.

The "Document Service Pipelines" table is as follows:

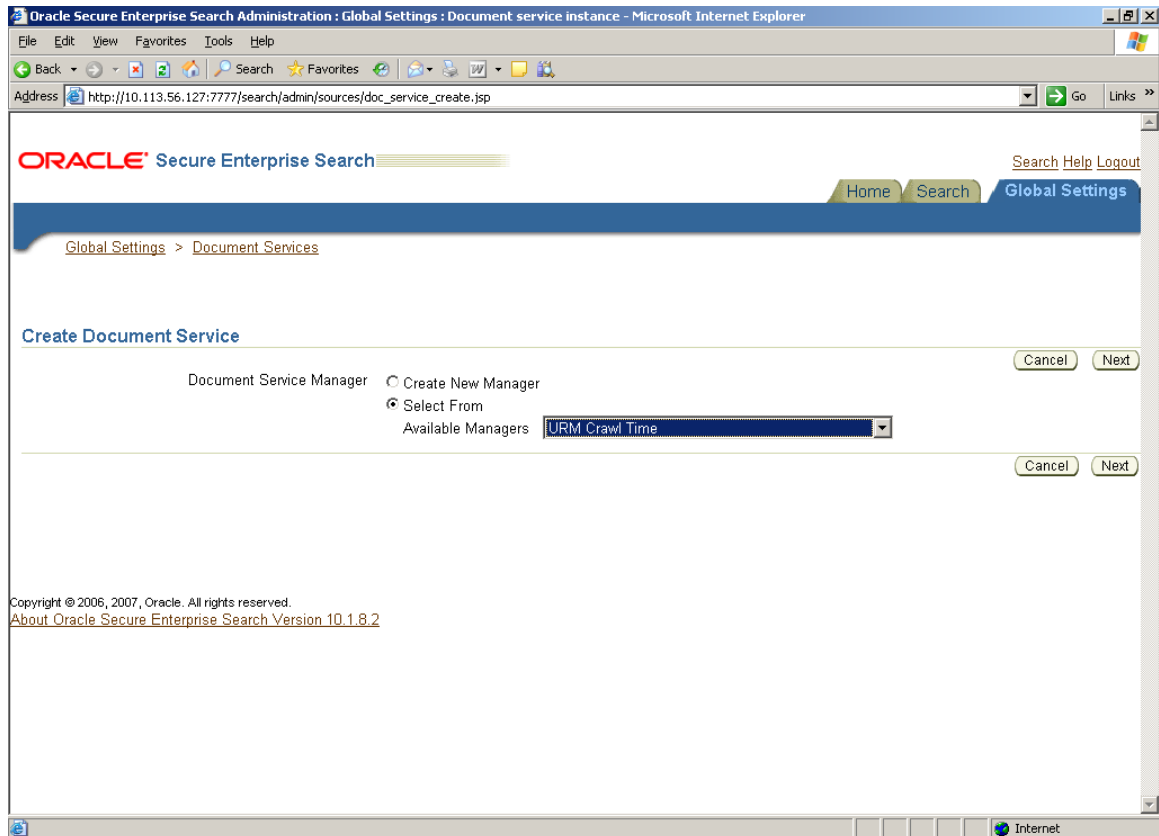
| Name | Description | Assigned Sources | Edit | Delete |
|------------------|-----------------------------------|------------------|------|--------|
| Default pipeline | Default document service pipeline | | | |

At the bottom of the page, there is a copyright notice: "Copyright © 2006, 2007, Oracle. All rights reserved." and a "Done" button in the browser's status bar.

2.3.3.10 Click on the “Create” button for Document Services again

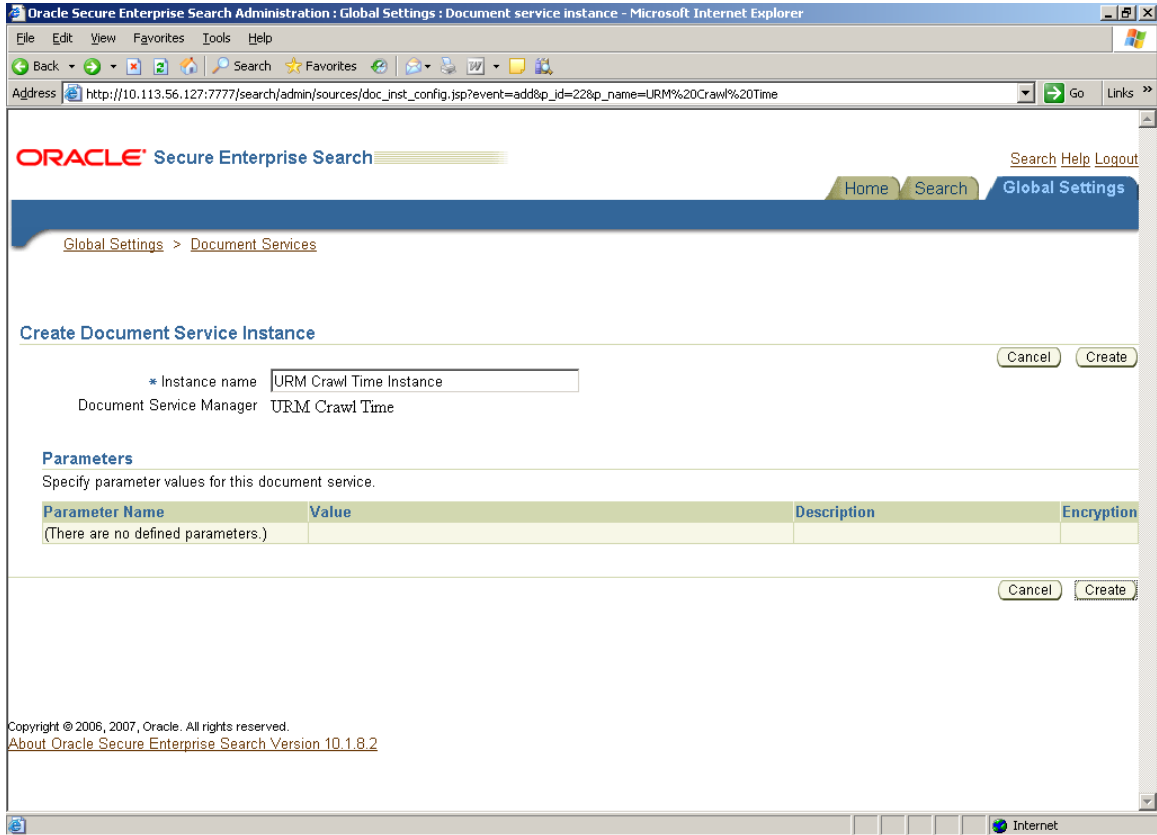
2.3.3.11 Create Document Service

- Choose “Select From” radio button
- In the drop down list select “URM Crawl Time”
- Click on the “Next” button



2.3.3.12 Create Document service Instance

- In the "Instance name" field enter the following value:
URM Crawl Time Instance
- Click the Create button



2.3.3.13 The URM Crawl Time Instance will now be created and click on “Create” button for the “Document Service Pipelines”

The screenshot shows the Oracle Secure Enterprise Search Administration web interface. The browser title is "Oracle Secure Enterprise Search Administration : Document Services : User-Defined : Manage Docu - Microsoft Internet Explorer". The address bar shows the URL: [http://10.113.56.127:7777/search/admin/sources/doc_service_list.jsp?event=expand&source=hg1&state=\(2\)&root=0&node=2](http://10.113.56.127:7777/search/admin/sources/doc_service_list.jsp?event=expand&source=hg1&state=(2)&root=0&node=2). The page has navigation tabs for "Home", "Search", and "Global Settings".

The main content area is titled "Global Settings" and contains two sections:

Document Services
 This section lists all document services. You can create as many new document services as you want. [Create](#)

Expand All | Collapse All

| Focus Name | Description | Edit | Delete |
|--|---|------|--------|
| Service Managers | | | |
| Secure Enterprise Search Document Summarizer | Service that extracts the most significant phrases and sentences for the document | | |
| URM Crawl Time | URM Crawl Time Attribute Plugin | | |
| URM Crawl Time Instance | | | |

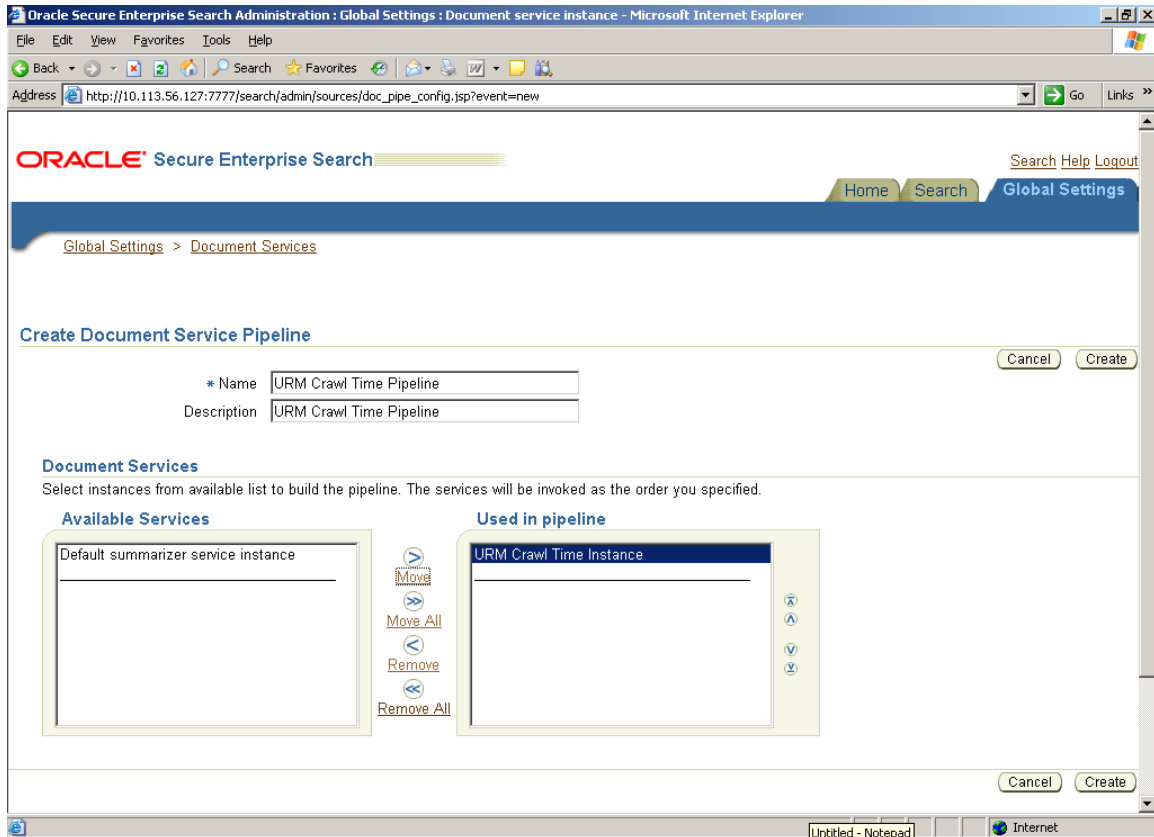
Document Service Pipelines
 This section lists all document service pipelines. You can create as many new document service pipelines as you want. [Create](#)

| Name | Description | Assigned Sources | Edit | Delete |
|------------------|-----------------------------------|------------------|------|--------|
| Default pipeline | Default document service pipeline | | | |

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2.3.3.14 Create Document Service Pipeline:

- In the name field Enter the following value:
URM Crawl Time Pipeline
- In the description field enter the following value:
URM Crawl Time Pipeline
- Select the “URM Crawl Time Instance” from the “Available Services” list
Click the Move button
- Now the URM Crawl Time Instance should be moved in to the “Used in pipeline” list.
- Finally, click on the “Create” button.



2.3.3.15 The URM Crawl Time Pipeline should now be created

The screenshot shows the Oracle Secure Enterprise Search Administration web interface. The browser title is "Oracle Secure Enterprise Search Administration : Document Services : User-Defined : Manage Docu - Microsoft Internet Explorer". The address bar shows "http://10.113.56.127:7777/search/admin/sources/doc_service_list.jsp".

The page header includes the Oracle logo and "Secure Enterprise Search". Navigation links for "Home", "Search", and "Global Settings" are visible. A "Global Settings" link is also present in the main content area.

Document Services
This section lists all document services. You can create as many new document services as you want. [Create](#)

Expand All | Collapse All

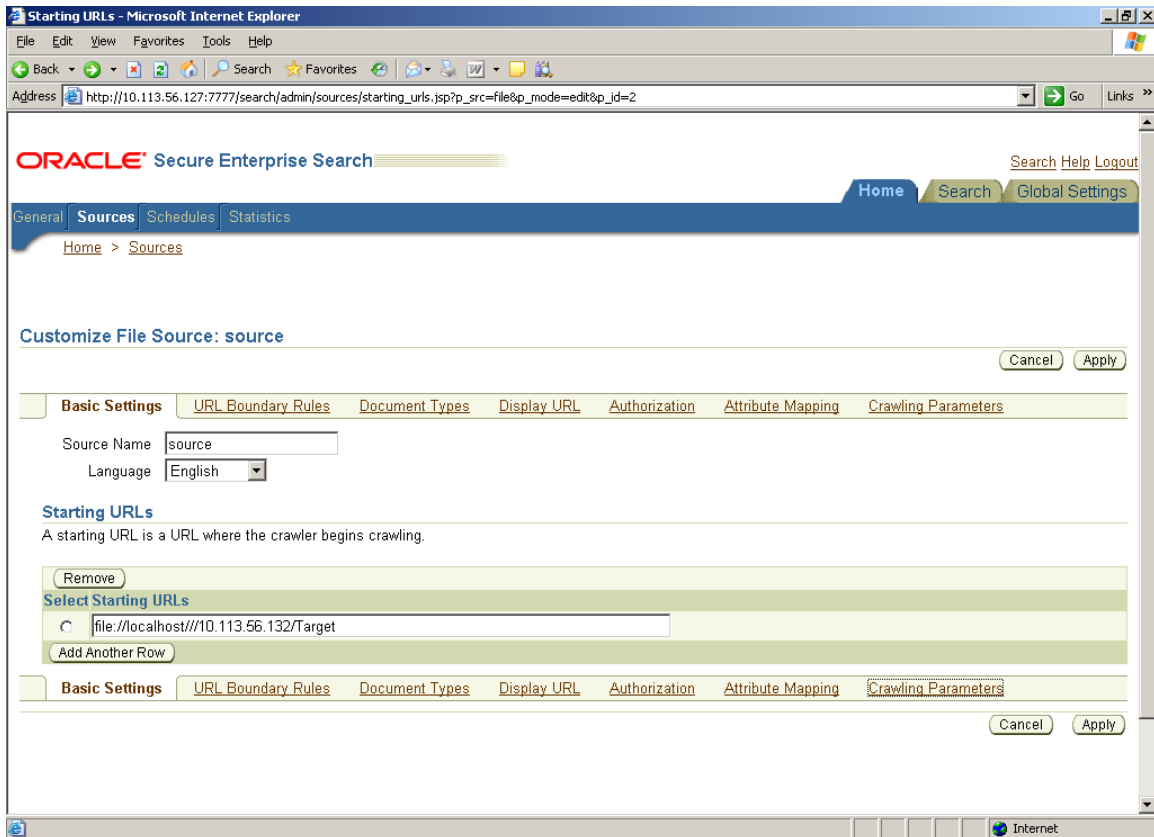
| Focus Name | Description | Edit | Delete |
|--|---|------|--------|
| Service Managers | | | |
| Secure Enterprise Search Document Summarizer | Service that extracts the most significant phrases and sentences for the document | | |
| URM Crawl Time | URM Crawl Time Attribute Plugin | | |

Document Service Pipelines
This section lists all document service pipelines. You can create as many new document service pipelines as you want. [Create](#)

| Name | Description | Assigned Sources | Edit | Delete |
|-------------------------|-----------------------------------|------------------|------|--------|
| Default pipeline | Default document service pipeline | | | |
| URM Crawl Time Pipeline | URM Crawl Time Pipeline | | | |

2.3.3.16 Navigate to Home>>Sources screen

2.3.3.17 Click on the pencil of the source you want to apply the pipeline to.



2.3.3.18 Crawling Parameters:

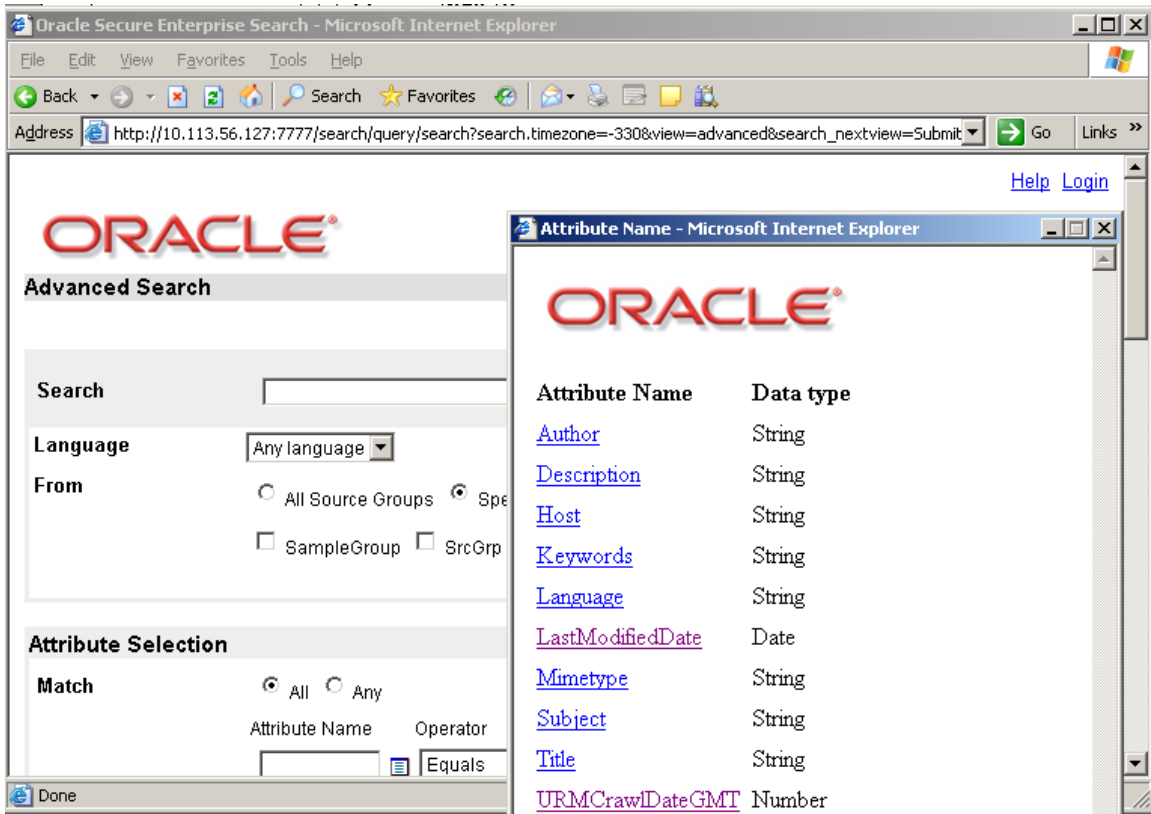
- Click on the “Crawling Parameters” tab.
- Under “Document Service Pipeline”, ensure that the “Enable” radio button is checked.
- Then in the “Select Pipeline” dropdown, choose the “URM Crawl Time Pipeline”
- Finally, click on “Apply” button.

The screenshot shows a web browser window titled "Crawling Parameters - Microsoft Internet Explorer". The address bar shows the URL: http://10.113.56.127:7777/search/admin/sources/edit_crawler_params.jsp?p_src=file&p_mode=edit&p_id=2. The page has a navigation bar with tabs: Basic Settings, URL Boundary Rules, Document Types, Display URL, Authorization, Attribute Mapping, and Crawling Parameters (selected). Below the navigation bar is a "General" section with the following settings:

- Crawling Depth: No limit, Limit (value: 2)
- Number of Crawler Threads: 5
- Enable Language Detection: No, Yes
- Default Language: English
- Crawler Timeout Threshold (seconds): 30
- Maximum Document Size (megabytes): 10
- Default Character Set: ISO Latin-1
- Document Service Pipeline: Disable, Enable
- Select Pipeline: URM Crawl Time Pipeline

At the bottom of the page, there are "Cancel" and "Apply" buttons. The footer contains the text: "Copyright © 2006, 2007, Oracle. All rights reserved. About Oracle Secure Enterprise Search Version 10.1.8.2".

2.3.3.19 After crawling the Source(s) that you specified in the new pipeline as mentioned administration guide, the attribute “URMCrawlTimeGMT” should show up for the source(s).



2.3.3.20 Steps to activate the OSES LDAP Login

- OSES admin tool should be installed
- Select Global Settings
- Select System >> Identity Management Setup
- Select <Active Directory> radio button.
- Click <Activate Button> command button.

Oracle Secure Enterprise Search Administration : Global Settings : Identity Management Setup - Microsoft Internet Explorer

Address: http://10.113.56.127:7777/search/admin/control/idmngmt_setup.jsp

Available Identity Plug-ins

[Select Identity Plug-in and...](#) [Activate](#) [Remove](#) [Register new Identity Plug-in](#)

| Select Description | Version | Plug-in Class Name | Jar File Name |
|--|------------|---|---|
| <input type="radio"/> Documentum Content Services | 10.1.8.2.0 | oracle.search.plugin.security.identity.dcs.DCSIdentityPluginManager | ../dcs/DCSIdentityPlugin.jar |
| <input type="radio"/> FileNet Image Services | 10.1.8.1.0 | oracle.search.plugin.security.identity.fnis.FNISIdentityPluginManager | ../fnis/FNISIdentityPlugin.jar |
| <input type="radio"/> Hummingbird Document Management Server | 10.1.8.2.0 | oracle.search.plugin.security.identity.hbhm.HBDMIdentityPluginManager | ../hbhm/HBDMIdentityPlugin.jar |
| <input type="radio"/> Livelink Content Services | 10.1.8.2.0 | oracle.search.plugin.security.identity.llcs.LLCSIdentityPluginManager | ../llcs/LLCSIdentityPlugin.jar |
| <input type="radio"/> Database | 10.1.8.2.0 | oracle.search.plugin.security.identity.db.DBIdentityPluginManager | ../oracleapplications/DBCrawler.jar |
| <input type="radio"/> Oracle E-Business Suite 11i | 10.1.8.2.0 | oracle.search.plugin.security.identity.ebs.EBS11IdentityPluginMgr | ../oracleapplications/EBS11Crawler.jar |
| <input type="radio"/> Oracle E-Business Suite R12 | 10.1.8.2.0 | oracle.search.plugin.security.identity.ebs.EBS12IdentityPluginMgr | ../oracleapplications/EBS12Crawler.jar |
| <input type="radio"/> Siebel 7.8 | 10.1.8.2.0 | oracle.search.plugin.security.identity.siebel.Siebel78IdentityPluginMgr | ../oracleapplications/Siebel78Crawler.jar |
| <input type="radio"/> Siebel 8 | 10.1.8.2.0 | oracle.search.plugin.security.identity.siebel.Siebel8IdentityPluginMgr | ../oracleapplications/Siebel8Crawler.jar |
| <input type="radio"/> Oracle Content Server | 10.1.8.2.0 | oracle.search.plugin.security.identity.stellent.StellentIdentityPluginMgr | ../oracleapplications/StellentCrawler.jar |
| <input type="radio"/> Oracle Internet Directory | 10.1.8.2.0 | oracle.search.plugin.security.identity.oid.OIDPluginManager | OIDPlugins.jar |
| <input type="radio"/> IBM DB2 Content Manager | 10.1.8.2.0 | oracle.search.plugin.security.identity.icm.ICMIdentityPluginManager | icm/ICMIdentityPlugin.jar |
| <input type="radio"/> Active Directory | 10.1.8.2.0 | oracle.search.plugin.security.idm.IdentityPluginManagerADImpl | idm/idmPlugin.jar |
| <input type="radio"/> Sun Java System Directory Server | 10.1.8.2.0 | oracle.search.plugin.security.idm.IdentityPluginManagerPlanetImpl | idm/idmPlugin.jar |
| <input type="radio"/> OpenLDAP Directory | 10.1.8.2.0 | oracle.search.plugin.security.idm.IdentityPluginManagerOpenLdapImpl | idm/idmPlugin.jar |
| <input type="radio"/> Lotus Notes | 10.1.8.1.0 | oracle.search.plugin.security.identity.ln.LNIdentityPluginManager | ln/LNIdentityPlugin.jar |

[Select Identity Plug-in and...](#) [Activate](#) [Remove](#)

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Done Internet

2.3.3.21 Set the values of Identity Plug-in page (LDAP Values):

- Enter the value of Directory URL in Directory URL Text Box.
Directory URL: ldap://host:ldap-port
- Enter the value of Directory account name in Directory account name Text Box.
Domain\user-id
- Enter the value of Directory account password in Directory account password Text Box.
- Enter the value of Directory subscriber in Directory subscriber Text Box.
Directory subscriber dc=**domain**, dc=com
- Enter "none" in Directory security protocol Text Box.
- Select <Finish> Command Button.
- The LDAP account should be configured as shown in the following screen shot.

Oracle Secure Enterprise Search Administration : Global Settings : Identity Management Setup - Microsoft Internet Explorer

Address: http://10.113.56.127:7777/search/admin/control/idmgmt_setup.jsp

ORACLE Secure Enterprise Search

Home Search Global Settings

Global Settings

Identity Management Setup

Register and activate an identity plug-in as an interface to an identity management system. The plug-in that you activate is responsible for all authentication and validation activity in Oracle SES.

Identity Plug-in Settings

Active Plug-in: **oracle.search.plugin.security.idm.IdentityPluginManagerADImpl** [Deactivate]

| Parameter Name | Value | Description |
|-----------------------------|--------------------------|---|
| Directory URL | ldap://10.113.49.190:389 | Directory url like "ldap://ldapserverhost:port" |
| Directory account name | sg\administrator | Directory account for connecting to. The format could be "DN", email or user name |
| Directory account password | **** | Directory account password |
| Directory subscriber | dc=sg, dc=com | Directory subscriber (ldap base) like "dc=us,dc=oracle,dc=com" |
| Directory security protocol | none | 'SSL' to connect via SSL |
| Additional User Base | | Additional User Base |
| Additional Group Base | | Additional Group Base |

Authentication Attribute: **USER_NAME**

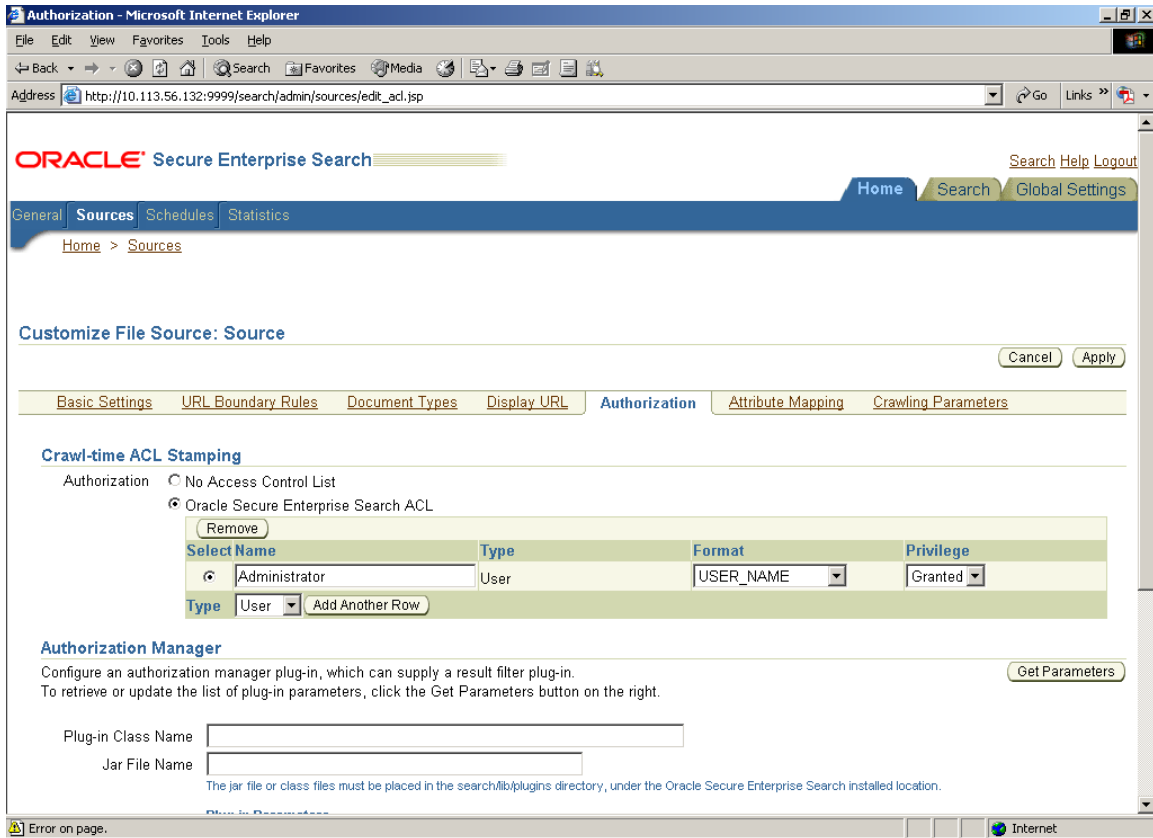
Available Identity Plug-ins

[Register new Identity Plug-in]

Select Identity Plug-in and... [Activate] [Remove]

2.3.3.22 Set the LDAP user for Authorization on the defined Source:
Go to Home> Source > Authorization tab

- Select the “Oracle Secure Enterprise Search ACL” option.
- Add the user by clicking on the “Add Another Row” button.
- Apply the setting



For running the adapter please refers to **Administration guide** for Oracle URM Adapter for FileSystem.