Oracle® Universal Records Management

Oracle Universal Records Manager Adapter for FileSystem Installation Guide

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Universal Records Manager Adapter for FileSystem Installation Guide,
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1 INSTALLATION OVERVIEW 3

1.1 OVERVIEW 3

1.2 ABOUT THE GUIDE 4

1.2.1 Audience 4

1.2.2 Conventions 4

1.3 ABOUT UNIVERSAL RECORD MANAGER (URM): 5

1.4 SOFTWARE REQUIREMENTS 5

1.4.1 Supported Databases 5

1.4.2 Compatibility with URM and Content Server 5

1.4.3 Oracle Secure Enterprise Search (10.1.8.2) 5

1.4.4 Optional Hardware Requirements 5

2 INSTALLING ORACLE URM ADAPTER FOR FILESYSTEM 6

2.1 OVERVIEW 6

2.2 PRE-INSTALLATION TASKS AND CONSIDERATIONS 6

2.2.1 Steps to set the environment for FileSystem Adapter 6

2.2.2 Installing the Adapter files 6

2.3 POST-INSTALLATION TASKS AND CONSIDERATIONS 12

2.3.1 Database setup for URM 12

2.3.2 Update the OSES custom fields in config.properties file 12

2.3.3 Steps for installation of OSES crawl time plug-in 12

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

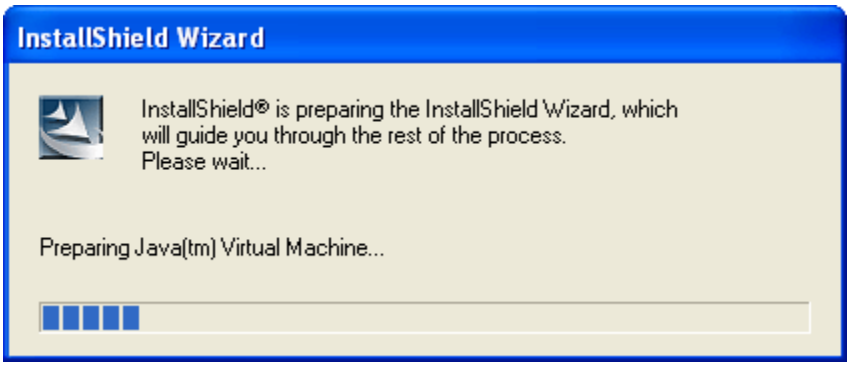
2.2.2 Installing the Adapter files

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:

o Double click on the Filesystem Adapter installer to start installation**.**

o The Install shield wizard dialog box opens as below.



For Linux Machine:

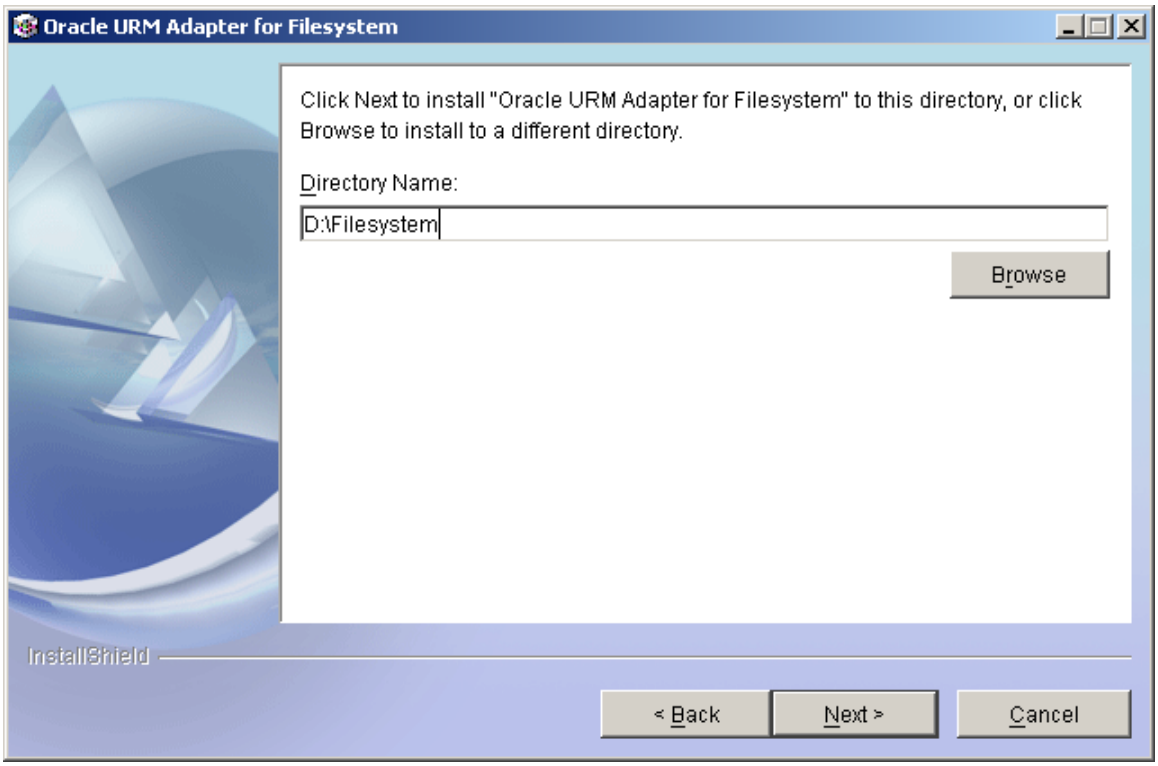
- The provided bin file FilesystemAdapter has to be run. Navigate to the location where the bin file is located.

- Type the following command to run the installer
  ". /<filename>.bin "

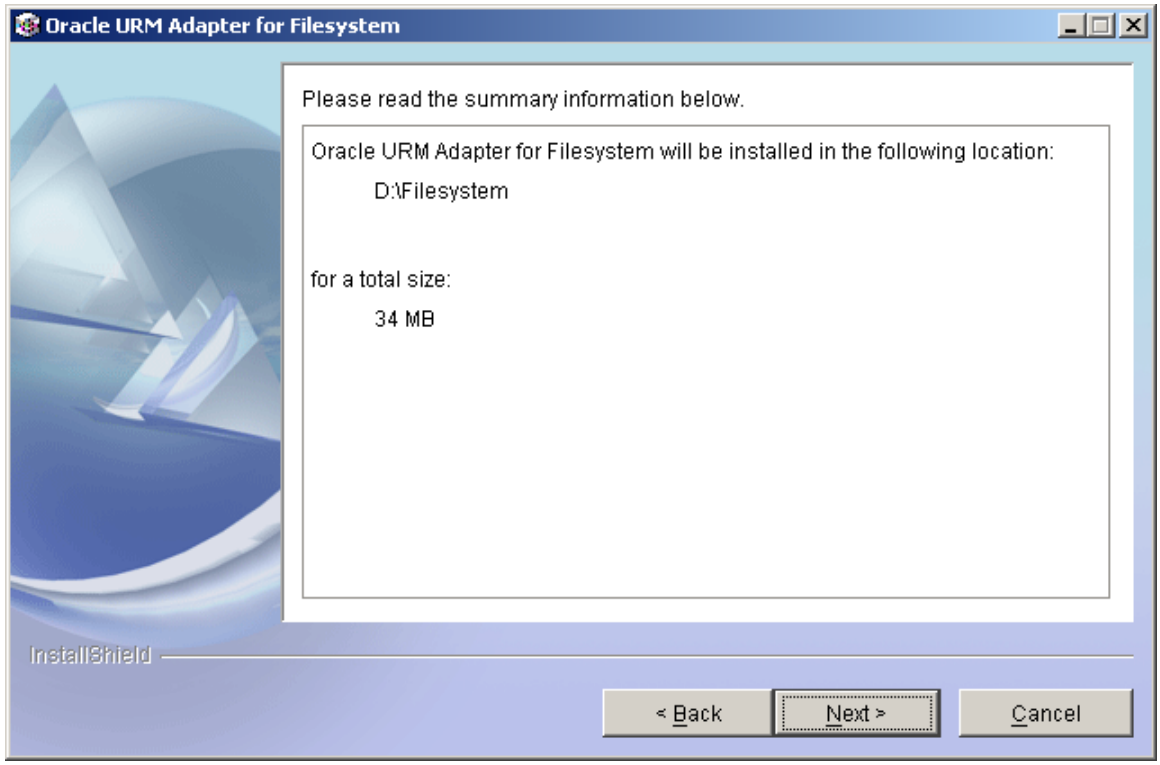
  E.g.: ./FilesystemAdapter.bin

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

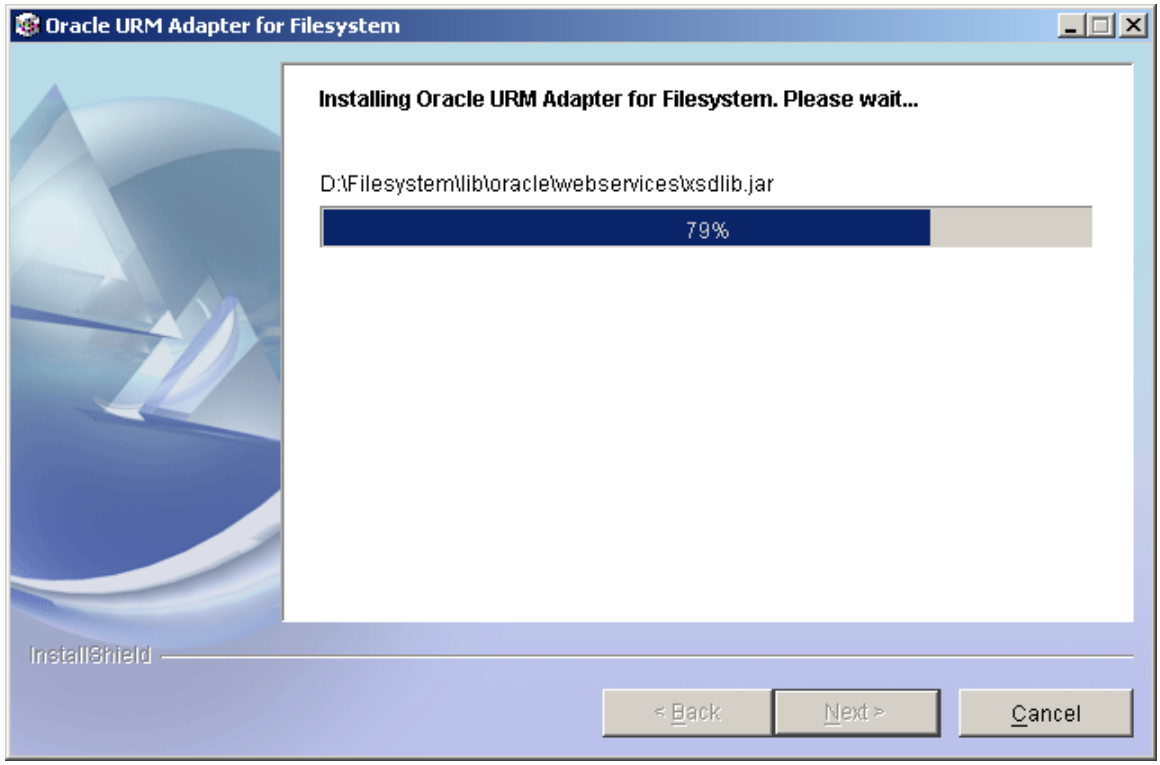
o Browse to the directory where the installer needs to be installed and click next.

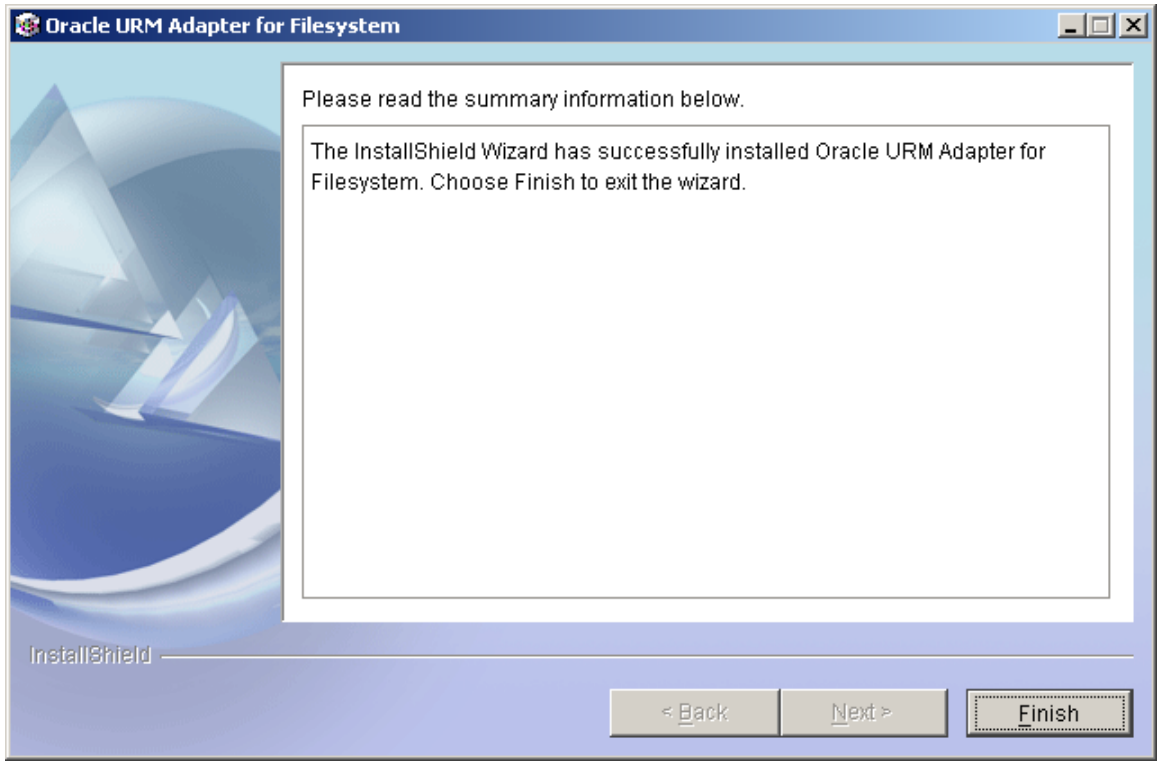


o A summary is provided as shown below. Click next.



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= URMCrwalDateGMT, CustomAttribute1, CustomAttribute2

2.3.3 Steps for installation of OSES crawl time plug-in

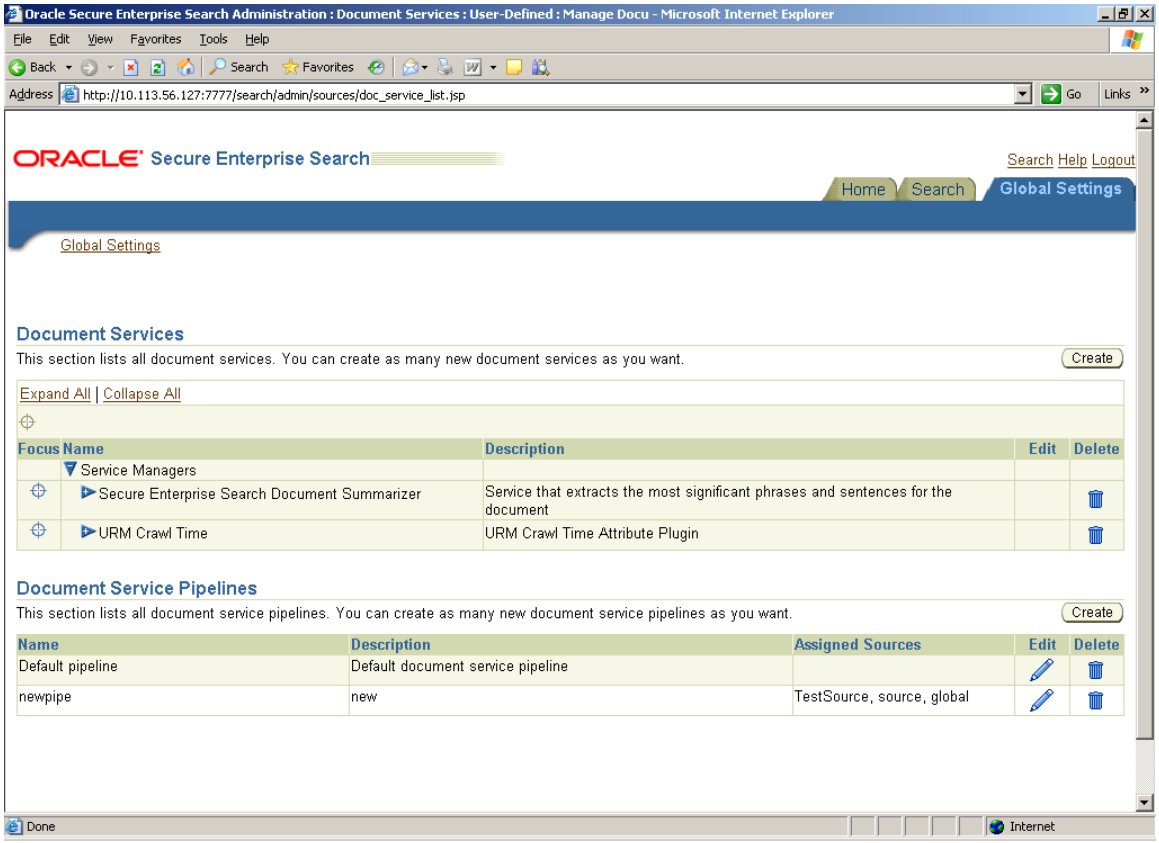
2.3.3.1 Create a folder "URMCrawlTimePlugin" in OSES root directory ($ORACLE_HOME \search\lib\plugins\doc directory).

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

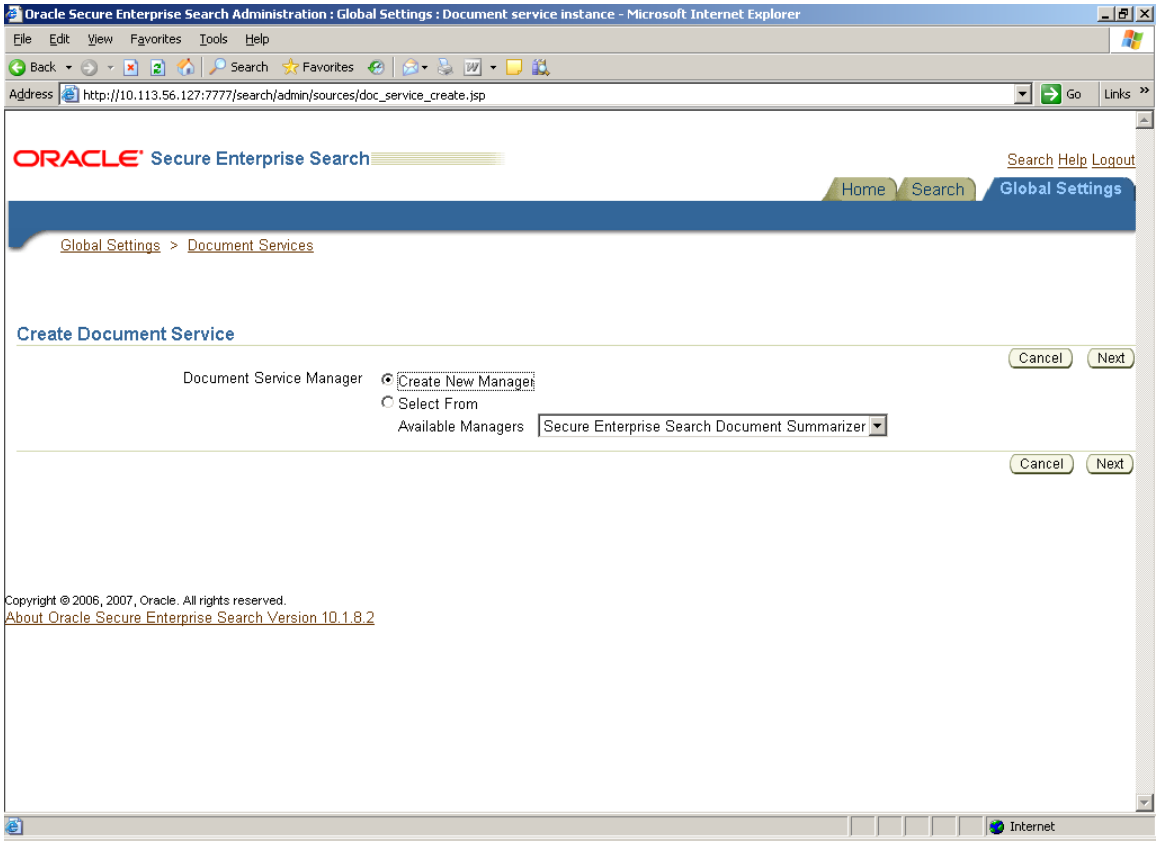
2.3.3.3 Login to the OSES admin tool and goto the Global Settings tab.

2.3.3.4 Click on the Document Services Link.

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

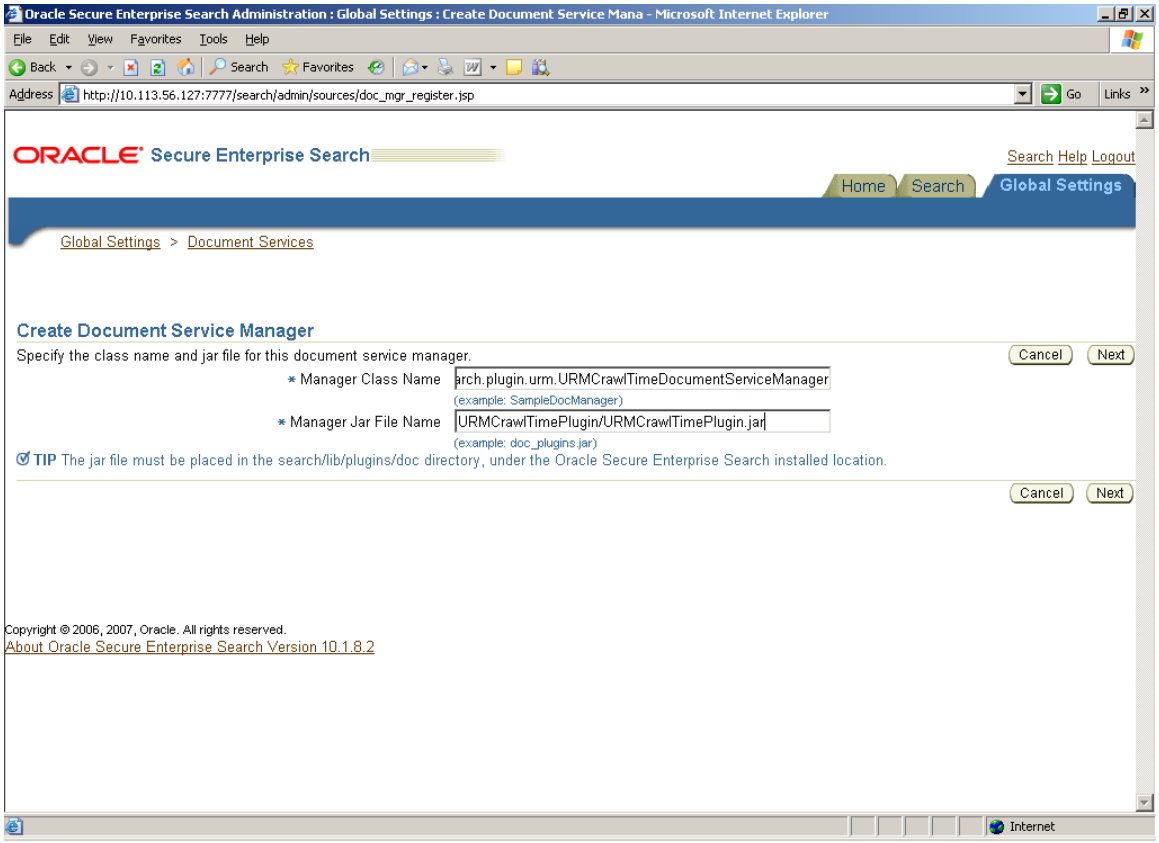


2.3.3.6 Click the radio button for Create New Manager and click the Next Button

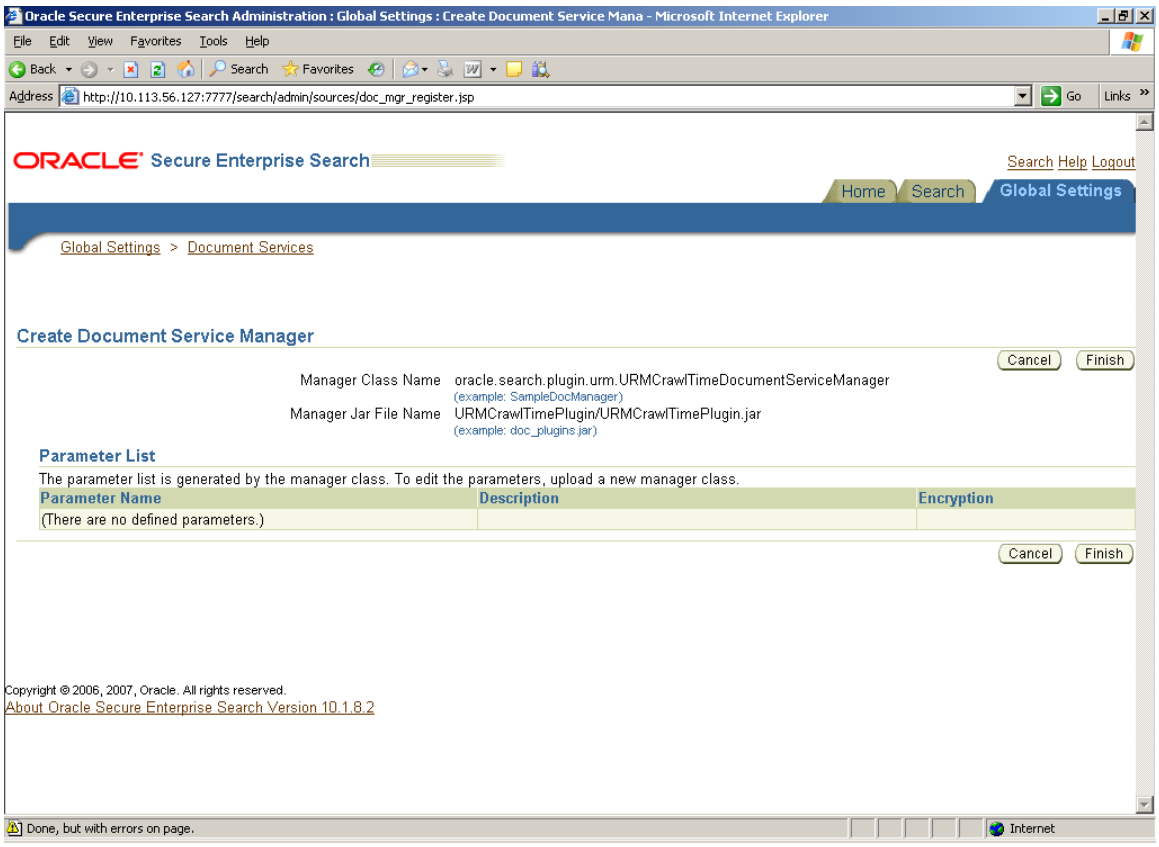


2.3.3.7 Create Document Service Manager:

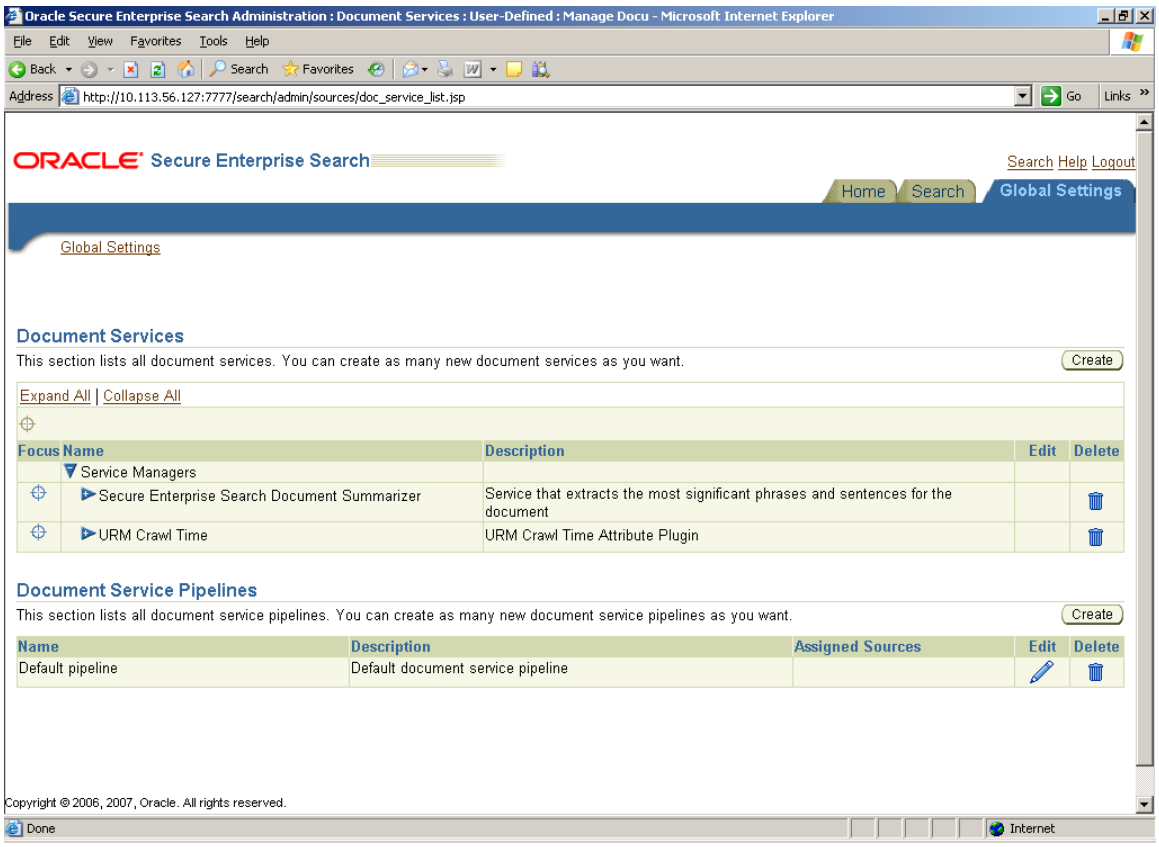
- In the “Manager Class Name” field enter the following value: oracle.search.plugin.urm.URMCrawlTimeDocumentServiceManager
- In the “Manger Jar File Name” field enter the following value: URMCrawlTimePlugin/URMCrawlTimePlugin.jar
- Click on the “Next” Button



2.3.3.8 Click on the “Finish” Button



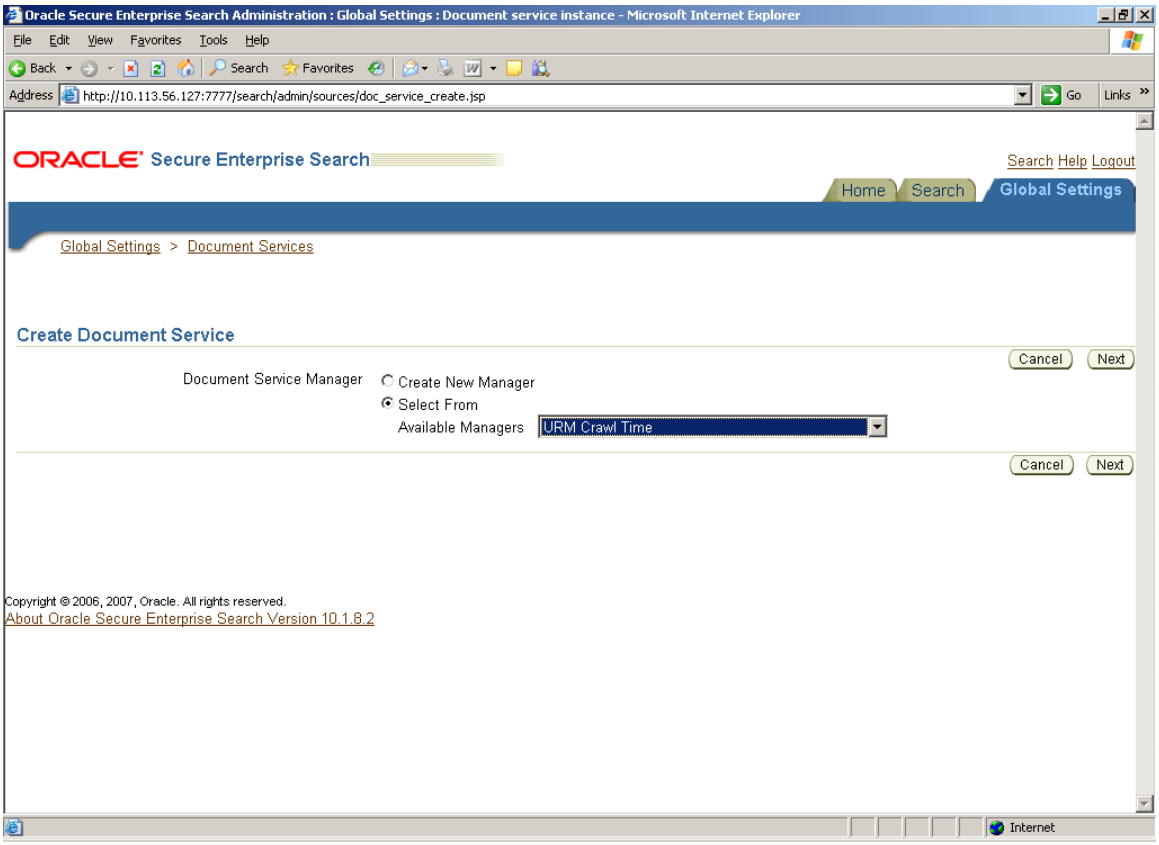
2.3.3.9 URM Crawl Time Manager should be registered



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

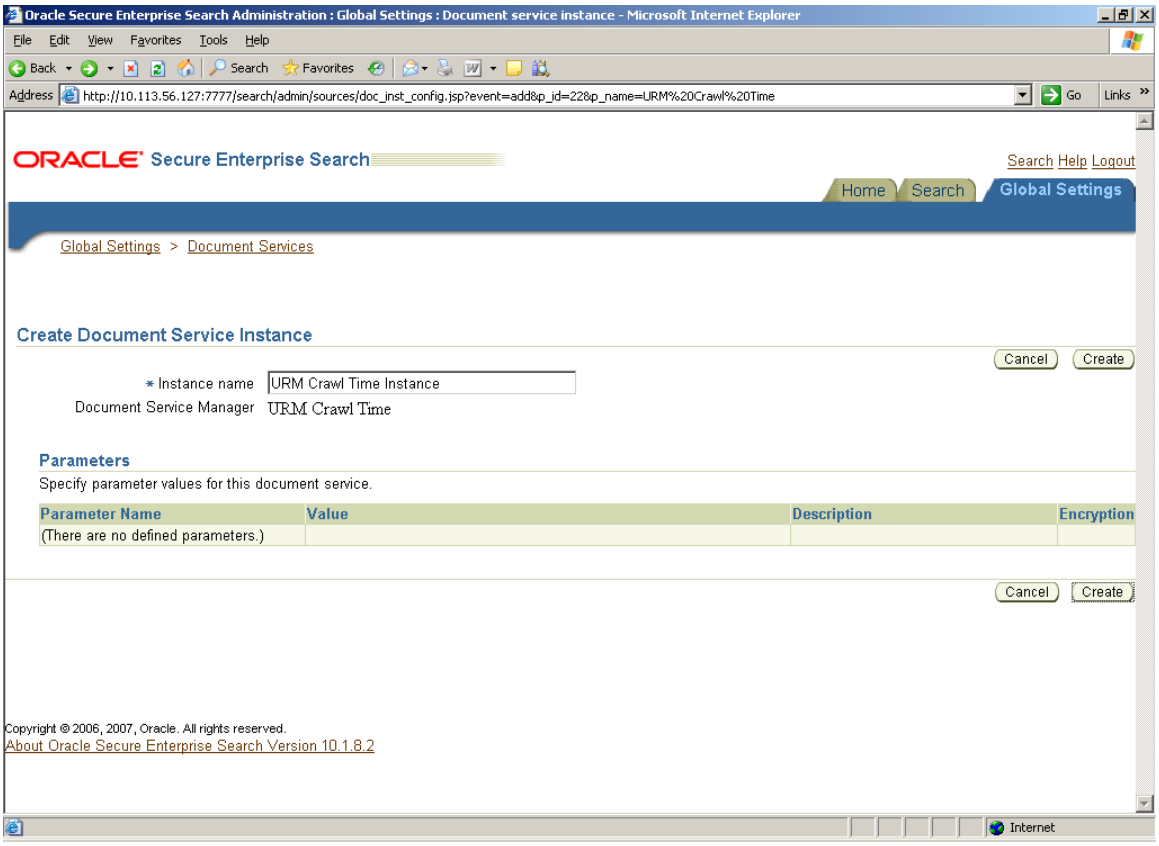
2.3.3.11 Create Document Service

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

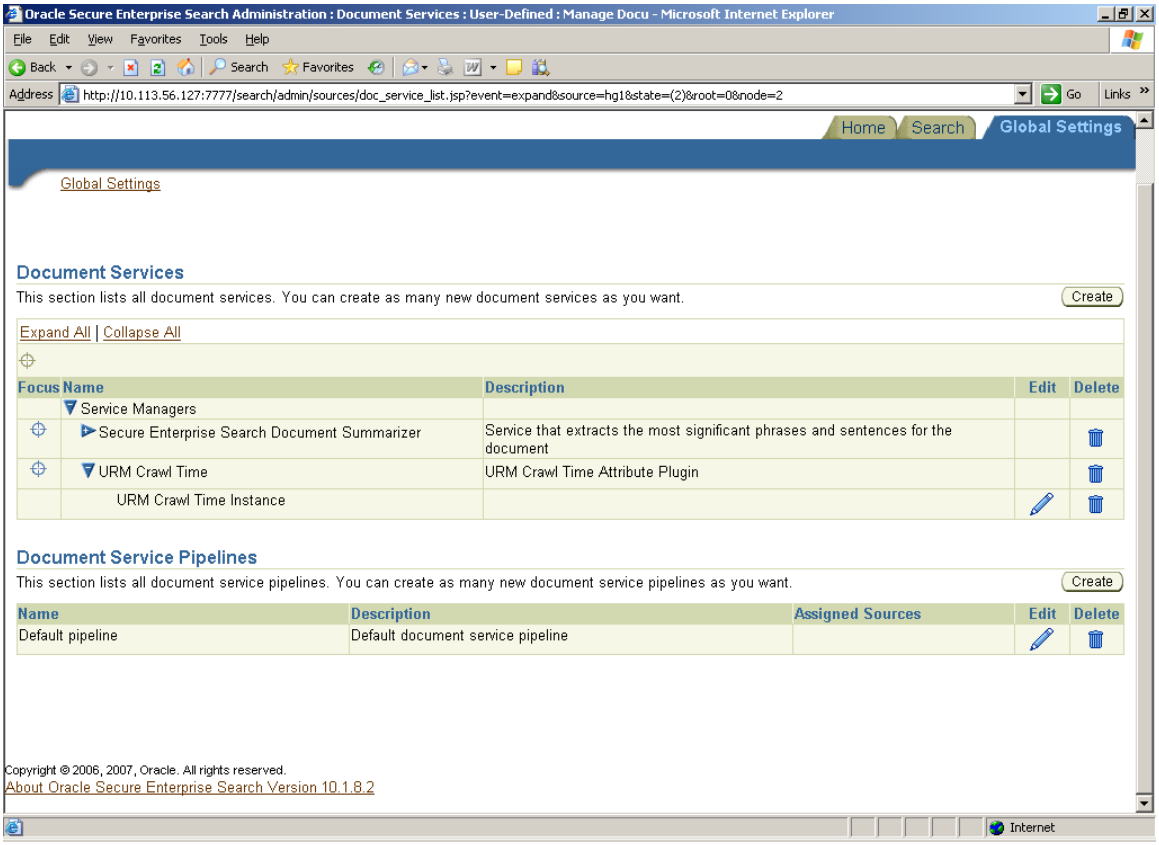


2.3.3.12 Create Document service Instance

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

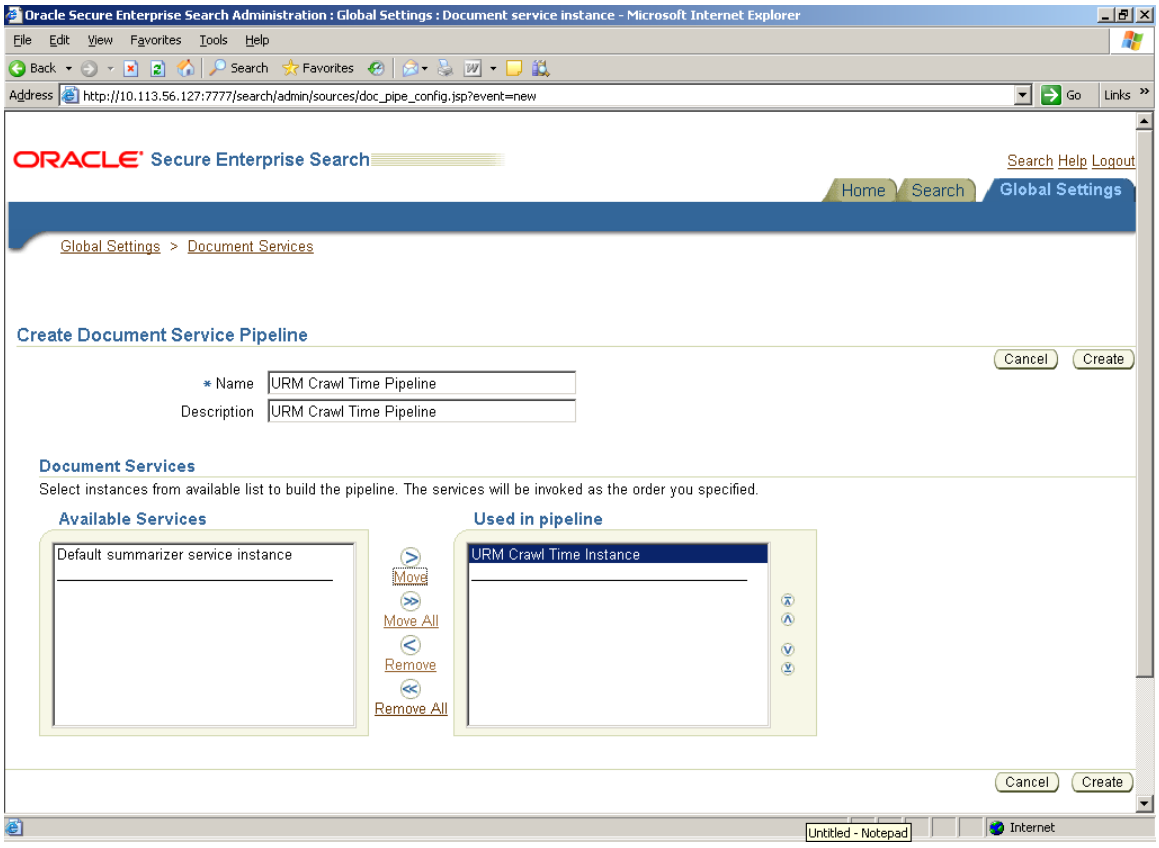


2.3.3.13 The URM Crawl Time Instance will now be created and click on “Create” button for the “Document Service Pipelines”

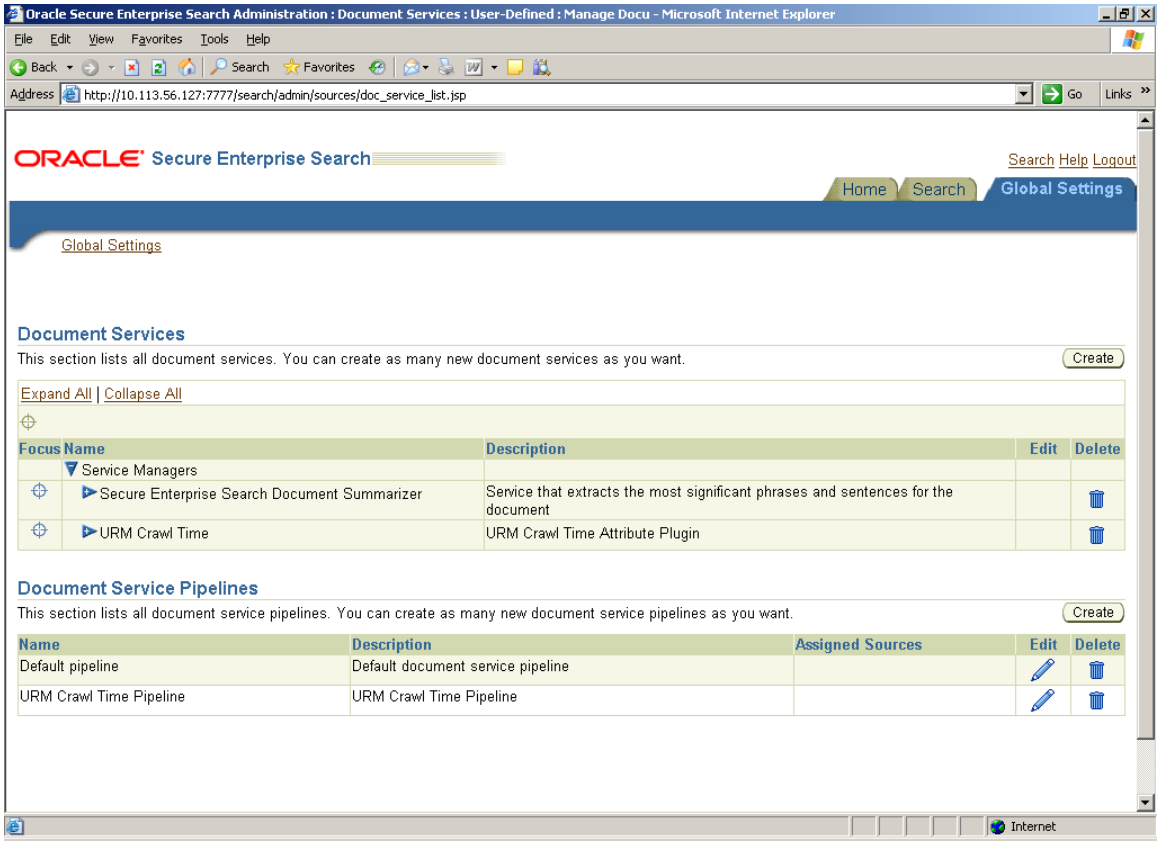


2.3.3.14 Create Document Service Pipeline:

- 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.

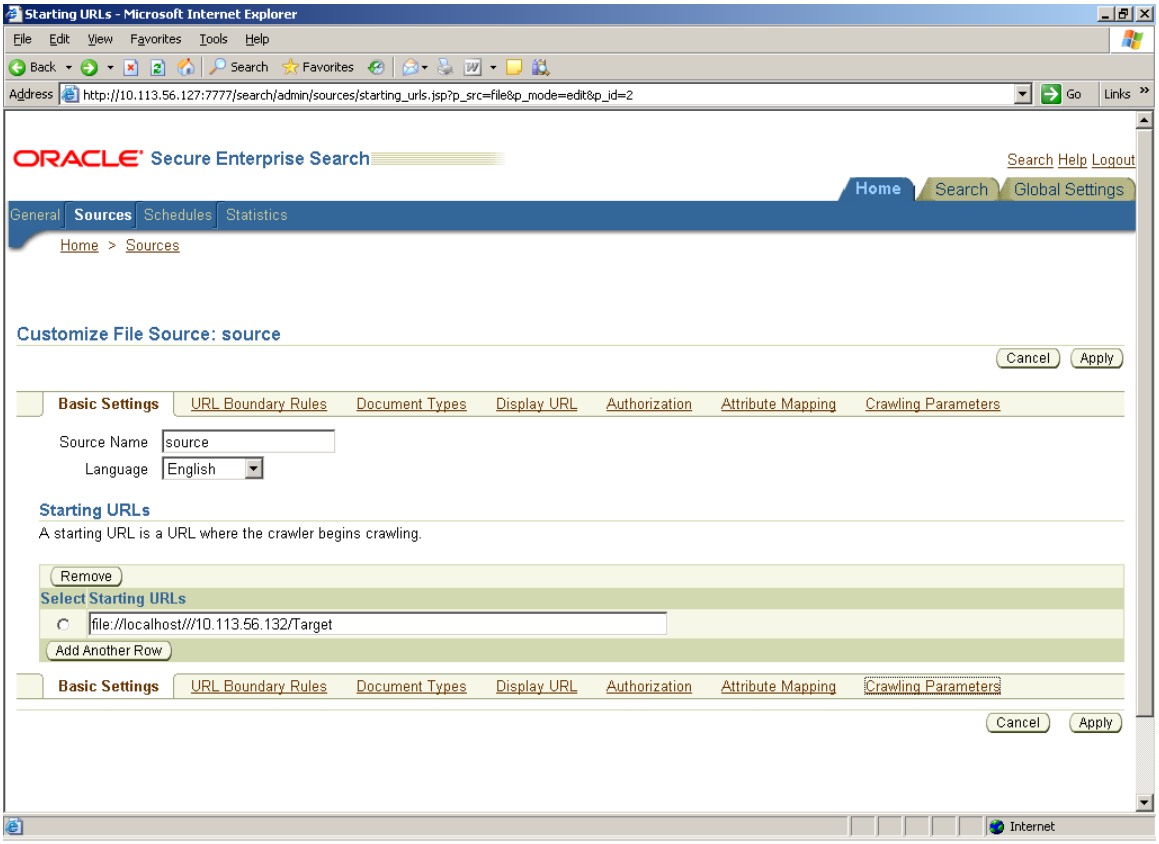


2.3.3.15 The URM Crawl Time Pipeline should now be created



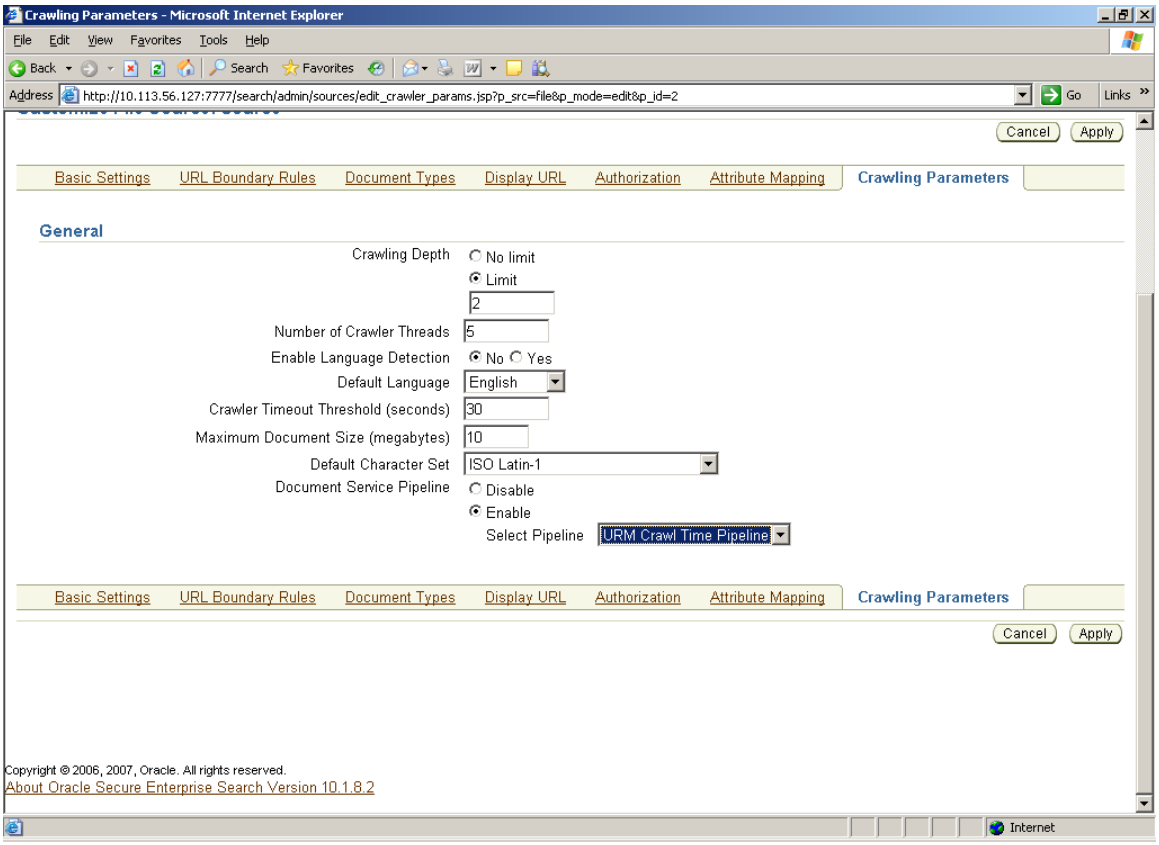
2.3.3.16 Navigate to Home>>Sources screen

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

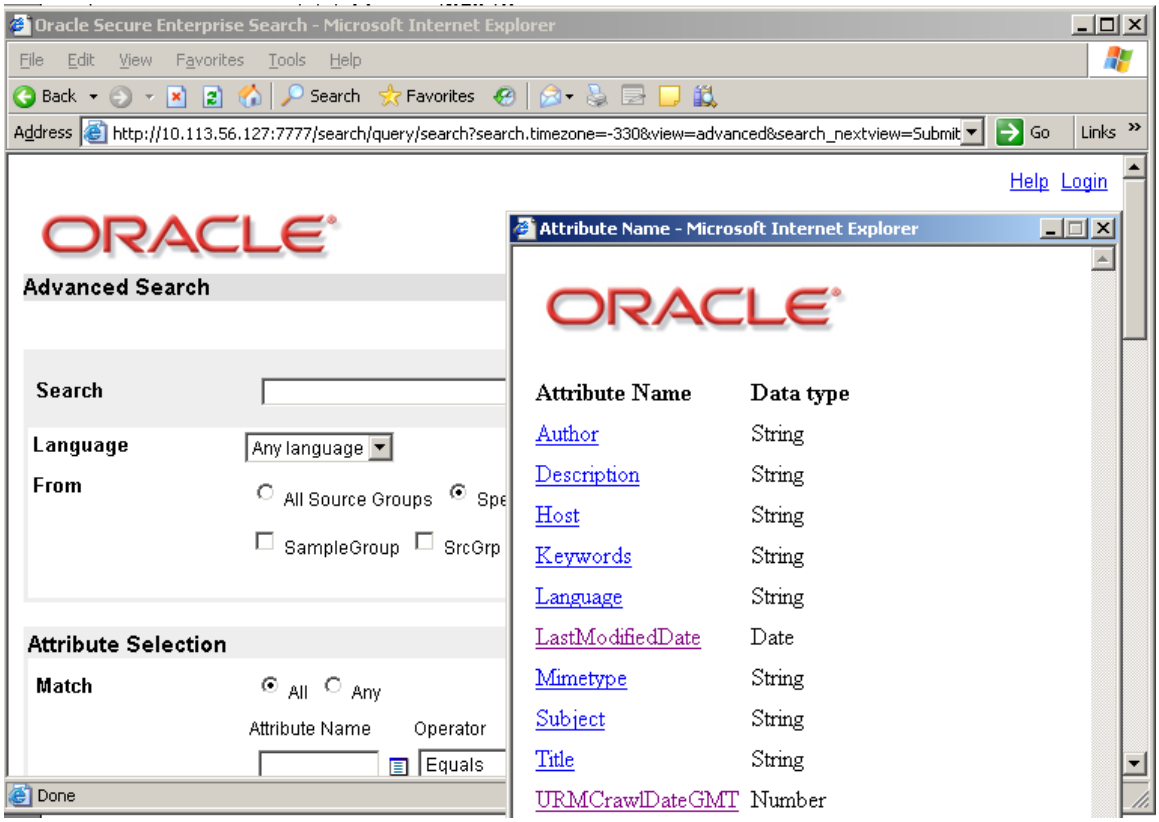


2.3.3.18 Crawling Parameters:

- 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.

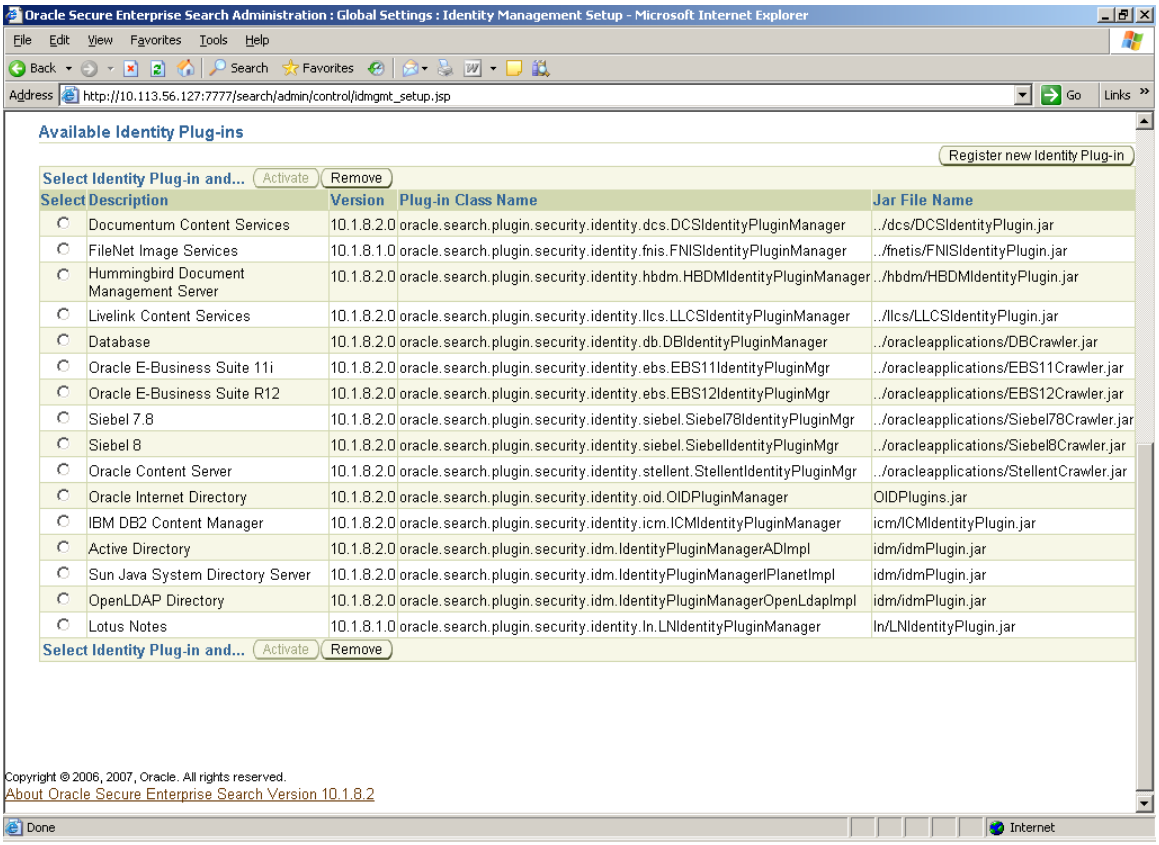


2.3.3.19 After crawling the Source(s) that you specified in the new pipeline as mentioned administration guide, the attribute “URMCrawlTimeGMT” should show up for the source(s).



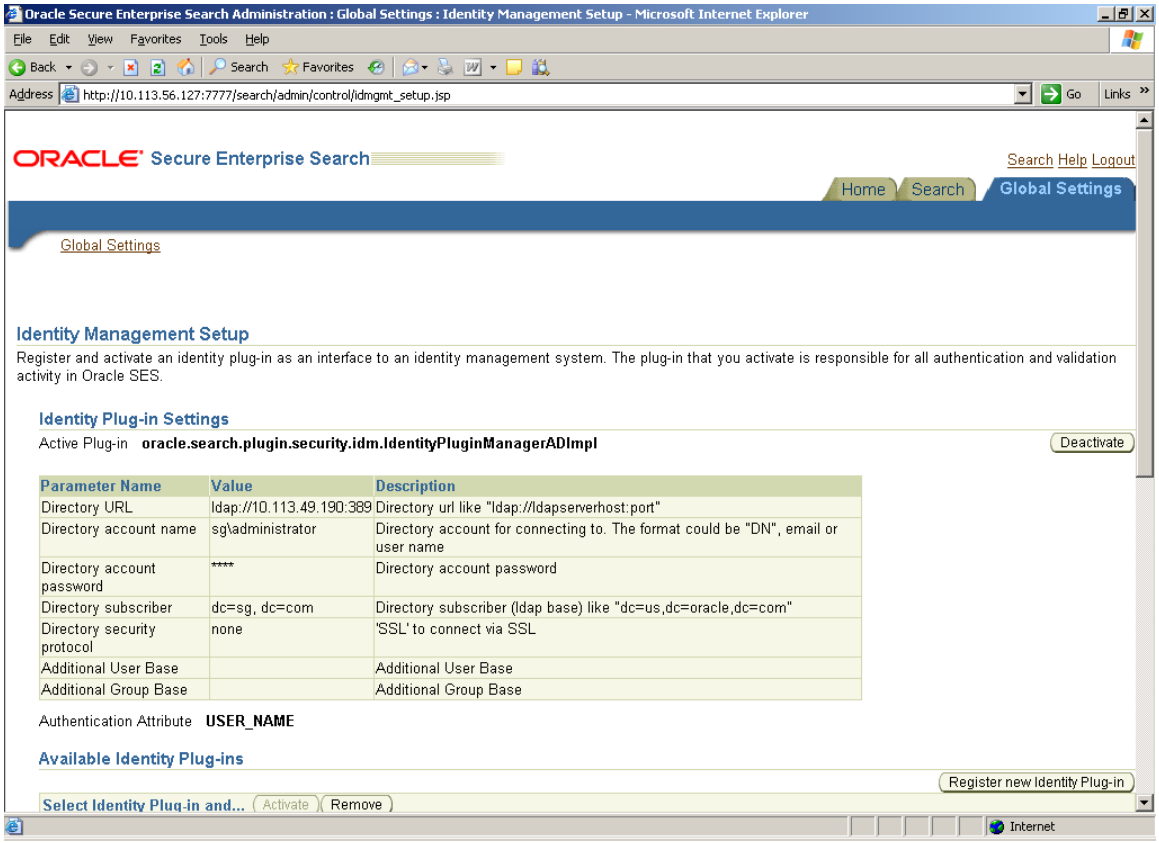
2.3.3.20 Steps to activate the OSES LDAP Login

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



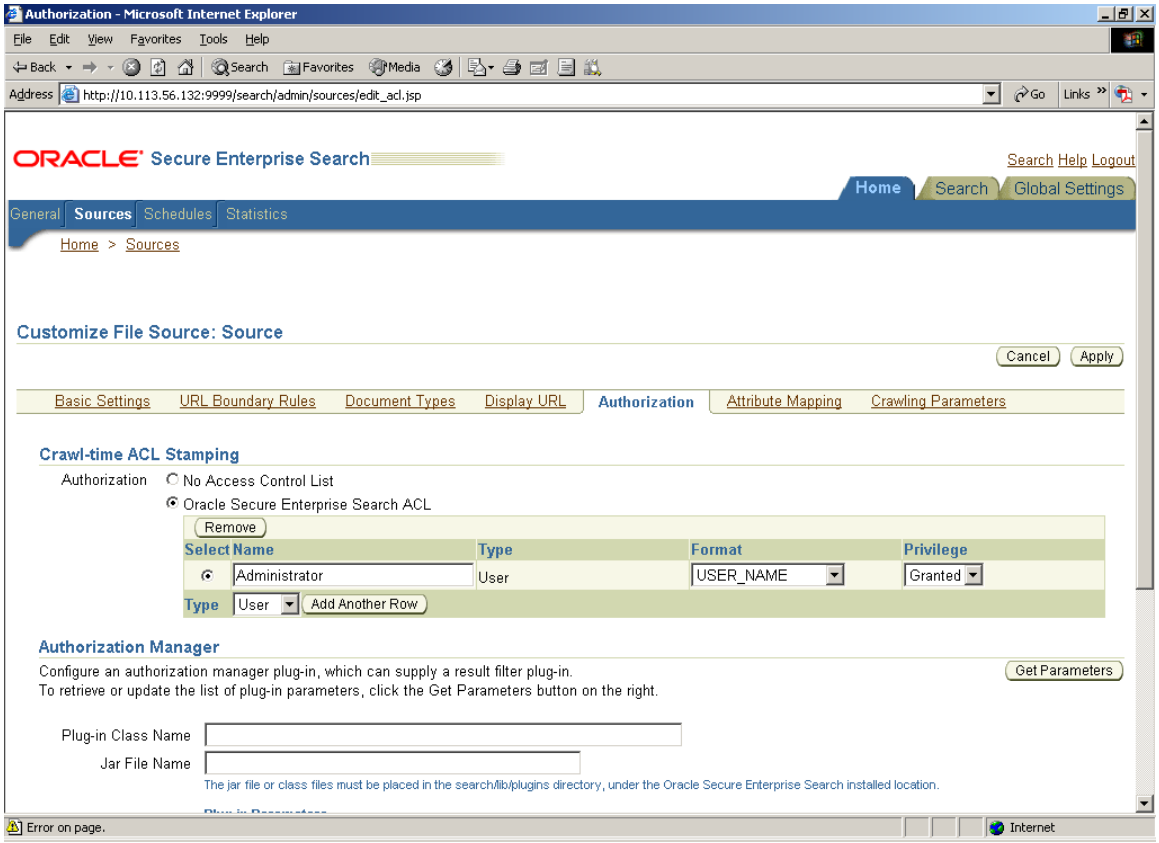
2.3.3.21 Set the values of Identity Plug-in page (LDAP Values):

- 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.



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.