Oracle® Universal Records Management

Records Manager DoD Edition User Guide

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General BSD License. A-5

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Chapter

1

INTRODUCTION

OVERVIEW

This section covers the following topics:

- About This Guide (page 1-1)
- What's New (page 1-2)
- Documentation and Help (page 1-3)

ABOUT THIS GUIDE

This guide provides instructions on using the Records Manager DoD Edition application. 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.

Symbols

The following symbols are used throughout this document:

Symbol	Description
	Note: Brings special attention to information.

Symbol	Description
	Tech Tip: Identifies information that can be used to make your tasks easier.
	Important: Identifies a required step or required information.
	Caution: Identifies information that might cause loss of data or serious system problems.

Conventions

The following conventions are used throughout this document:

- The notation <*Install_Dir*>/ is used to refer to the location on your system where a specific instance of Content Server is installed.
- Forward slashes (/) are used to separate parts of an Internet address. For example, http://www.microsoft.com/windows2000/. A forward slash might or might not appear at the end of an Internet address. Forward slashes (/) are also used to separate the directory levels in a path name whether on a UNIX or a Windows system. A forward slash always appears after the end of a directory name.
- Paths to access operating system screens use the following formatting structure:

  Start—Settings—Control Panel
- Required user input is distinguished using the following font formatting: `xyz_name`

Guide Audience

This guide provides instructions on using the Records Manager DoD Edition application. It is intended mainly for those who need to check in and maintain records and non-record content items managed by Records Manager DoD Edition (typically those with the predefined 'rma' role). For information about tasks restricted to administrators and users with increased privileges, see the *Records Manager DoD Edition System Administration Guide*.

WHAT'S NEW

Several interface changes have been made from Verion 7.1.4:

- ❖ Retention tasks to be processed are now available on pull-down menus instead of from the Trays menu.
- ❖ Advanced screening is no longer available. That functionality has been merged into the regular screening functionality.
- ❖ Dormant global triggers as a trigger type are no longer selectable as an option. You can create dormant global triggers by simply not adding an activiation date when you create the trigger.
- ❖ The Configure Retention Components page is no longer used to configure aspects of the retention schedule (triggers, dispositions, and so on). All functionality of that type is now available by using pull-down menus which are available throughout the product.
- ❖ You can now edit pre-defined link (related content) types. By default the main links with new content item revisions is checked. This can be changed so linking is not revision independent.

DOCUMENTATION AND HELP

This section covers the following topics:

- ❖ Documentation (page 1-3)
- ❖ Tooltips (page 1-4)
- ❖ Quick Help (page 1-5)
- ❖ Help Menu (page 1-5)

Documentation

The following Records Manager DoD Edition documentation is available:

- ❖ **Records Manager DoD Edition Installation Guide:** This document provides information on installing the Records Manager DoD Edition software on the content server. It is provided as a PDF file on the Records Manager DoD Edition software distribution media.
- ❖ **Records Manager DoD Edition System Administration Guide:** This document provides information on setting up and administering the Records Manager DoD Edition application on the content server. It is provided as a PDF file and HTML help system, both of which can be accessed from the Records Manager DoD Edition user

interface. The PDF file is also available on the Records Manager DoD Edition software distribution media.

- **Records Manager DoD Edition User Guide** (this guide): This document provides information on using the Records Manager DoD Edition application on the content server. It is provided as a PDF file and HTML help system, both of which can be accessed from the Records Manager DoD Edition user interface. The PDF file is also available on the Records Manager DoD Edition software distribution media.

In addition to these guides, you can also access information about the product with context-sensitive:

- Tooltips (page 1-4)
- Quick Help (page 1-5)
- Help Menu (page 1-5)

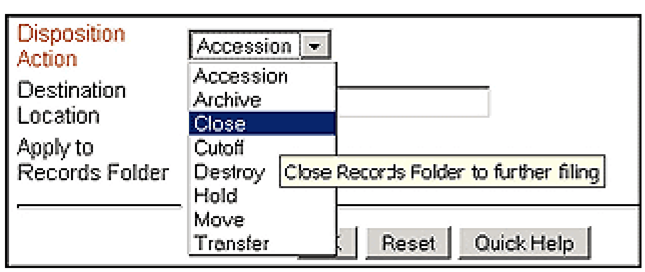
Tooltips

If you hover the mouse cursor over a field label in your web browser, you can get context-sensitive information on the field label. A question mark is displayed, and then the tooltip appears.

Figure 1-1 Field label tooltip

If you are using Netscape, Mozilla, or Firefox as your web browser, you can view tooltips for items in options lists as well, provided the list items are not custom entries.

Figure 1-2 Option list item tooltip (only supported by Netscape, Mozilla, and Firefox browsers)



Quick Help

Click the **Quick Help** button where available on pages and screens to view context-sensitive help for that page or screen.

Help Menu

You can click the main menu Help link to open the online HTML help system for Content Server, which includes the Records Manager DoD Edition help files. If you are logged in with user privileges, you will only see the end-user help system. If you are logged in as an administrator, you will see the full administrator help system (including the user documentation).

Chapter

2

INTRODUCTION TO RECORDS MANAGEMENT

OVERVIEW

This section covers the following topics:

- Management of Records and Other Retained Items (page 2-1)
- About Records Manager DoD Edition (page 2-8)
- Basic Retention Management Concepts (page 2-9)
- Records Manager DoD Edition and Content Server (page 2-13)
- Basic Processes (page 2-13)

MANAGEMENT OF RECORDS AND OTHER RETAINED ITEMS

Records Manager DoD Edition effectively manages both record and non-record content items on a retention schedule. The focus of Records Management tends to be the ***preservation of records*** for historical or archival purposes while also performing retention management functions. The focus of retention management of non-record content items tends to be the ***scheduled elimination of content*** in which the costs of retaining content outweighs the value of keeping it.

This section covers the following topics:

- ❖ Needs for Records Management (page 2-2)
- ❖ What Do I Retain? (page 2-3)
- ❖ Lifecycle for Records (page 2-6)
- ❖ Types of Retained Content (page 2-7)

Needs for Records Management

There are various reasons why organizations may need records management:

- ❖ Regulatory Needs (page 2-2)
- ❖ Litigation Needs (page 2-2)
- ❖ Business Needs (page 2-3)

Regulatory Needs

Many organizations are subject to regulations that require the retention of information for a specified period of time:

- ❖ Sarbanes Oxley:
  - Applies to all publicly traded corporations or companies that may become public
  - Audit-related working papers, communications, and correspondence must be retained for five years after the audit
- ❖ Government organizations—DoD 5015.2, General Records Schedule
- ❖ Pharmaceutical/healthcare industry—HIPAA, FDA regulations
- ❖ Financial services—SEC Rule 17a
- ❖ Telecommunications industry—47 CFR 42, etc.

Records management enables organizations to comply with the retention requirements of these regulations.

Litigation Needs

There may be litigation-related needs for effective and efficient records management:

- ❖ Policy-based retention of records:
  - Retain information that you may need for litigation (for example, a contract and any communication relating to it).

  - Centralized searching and retrieval of that information
- ❖ Systematic disposition of eligible records or non-record content:
  - Less material to search through during discovery
  - Less material to give to opposing counsel
- ❖ Suspend/freeze disposition of records or non-record content items relating to pending litigation:
  - Avoid appearance of cover-up and possible liability when records or non-record content items relating to pending litigation are destroyed.

Business Needs

There may be business-related needs for effective and efficient records management:

- ❖ "Islands of content" problem. Content items that are:
  - Generated across the organization
  - Created in a variety of forms—for example, e-mail, office application documents, sheets of paper, CDs, DVDs, microfiche, recordings of corporate events and conference calls, etc.
  - Stored in an ad-hoc fashion in a variety of locations—for example, employee desks, employee computers, corporate servers, central file storage, offsite storage.
- ❖ There is a need to:
  - Provide a uniform infrastructure for retrieving and sharing the content across the organization.
  - Ensure that content items are retained over the period of time that they are useful to the business.

Records Manager DoD Edition manages all records and non-record content items, regardless of their source, in a single, consistent, manageable infrastructure.

What Do I Retain?

Both record and non-record content items for retention are any form of information, both physical and electronic that is **important** enough for an organization that it must be **retained** for a specific period and may be **disposed** of when it is no longer needed.

- ❖ DoD 5015 record: As defined above with the stipulation that it is also made or received by an agency of the United States Government. The U.S. Government defines records as follows:

"Records include all books, papers, maps, photographs, machine-readable materials, or other documentary materials, regardless of physical form or characteristics, made or received by an Agency of the United States Government under Federal law or in connection with the transaction of public business and preserved or appropriate for preservation by that agency or its legitimate successor as evidence of the organization, functions, policies, decisions, procedures, operations, or other activities of the Government or because of the informational value in them."

- Business record: As defined above with the stipulation that it is used in the transaction of public business.
- Non-record content items: As defined above with no additional governmental or public business criteria. However, it can be revisioned, retained (but not necessarily with a minimum retention period), and can be on a disposition schedule.

  Your organization may choose to manage non-record content with Records Manager DoD Edition to eliminate outdated and misleading information, track documents related to legal proceedings, and manage storage resources. Basically, managing non-records content provides a much simpler deployment of Records Manager DoD Edition for organizations that do not need a full compliance with DoD5015.

See the following sections for more information:

- Importance of Content (page 2-5)
- Retention (page 2-6)
- Disposal (page 2-6)

How do Records and Non-Record Content Differ?

There are a number of basic differences between records and non-record content retention qualities:

- **Purpose:** Records are essentially historical artifacts, whereas non-record content items for retention are generally live, active documents that can be revisioned.
- **Benefits:** Benefits of managing records is compliance with regulations and corporate retention policies. Benefits of managing non-record content items is reduced risk and cost of discovery for litigation, reduced costs associated with storage, elimination of clutter to promote user efficiency, and dissemination of only current information to improve communication.
- **Ability to Revision:** Records cannot be changed once checked in, which means they cannot be revisioned after they become records. Non-record content items can be checked out, modified, and checked back in to create multiple revisions.

- **Actions Available after Cutoff**:
  - Records can have their metadata edited until they are cut off (when the record status changes and it goes to disposition). Non-record content can have their metadata edited after cutoff.
  - Records that are cut off or frozen cannot be deleted. Non-record content that is cut off can be deleted.
- **Disposition**: Records have disposition schedules assigned by their location in the Retention Schedule. This defines how they should be retained and disposed of, whereas non-record content items generally have disposition schedules (life cycles) assigned by item upon check in.

Note: Records Manager DoD Edition supports disposition schedules for non-record content items, which means it can manage retention and disposal of non-record content. This enables you to schedule lifecycles for content to eliminate outdated or superseded information, manage storage resources, or handle legal procedures.

- **Filing**: Records can be filed into folders, and non-records can be filed only into categories set up for non-record content. Therefore, documentation about folders and interactions with folders are intended for record-centric content only.
- **Functionality Specific to Records Only**:
  - Classification/Supplemental Markings
  - Permanence
  - Record Folders
- **Functionality Available to Content outside of Retention Schedule**:
  - Freeze
  - Link
  - Subject to Review

Importance of Content

Retained information can be **important** for a variety of reasons:

- The information may be required for the day-to-day operations of the organization and needs to be kept for historical, tracking, or audit purposes (for example, receipts, order histories, completed forms, personnel files, corporate announcements).
- The information may be necessary to the success or survival of the organization (for example, software source code, contracts, financial data).

- There may be internal policies or external regulations that require the information to be retained (for example, transaction documents, financial statements, lease agreements).
- The data may be important in preparation for possible litigation or discovery.

Retention

The information may need to be **retained** for different periods of time, depending on the type of content, its use within the organization, and the need to comply with external laws or regulations.

- The retention may be time-based (for example, five years from the record filing date).
- The retention period may be event-based (for example, an employee termination).
- The retention period may be both time-based and event-based (for example, two years after employee termination).
- The retention may be based on revision (for non-record content items).

Disposal

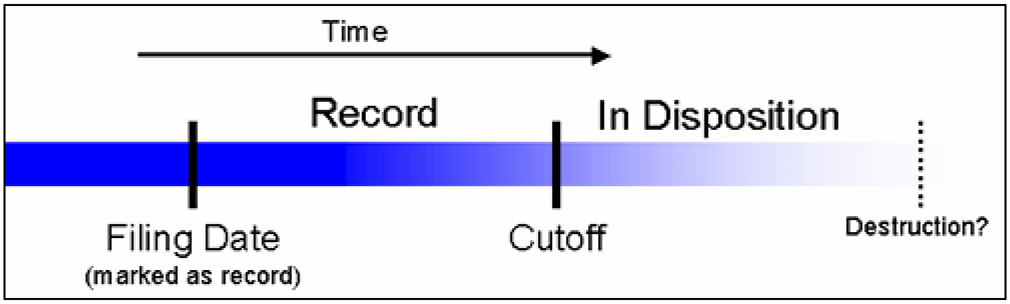
After a retention period, records and non-record content items are disposed of by authorized people according to the requirements of the organization. Disposition actions include:

- Destroy (physical or electronic), possibly after a certain period of retention.
- Store within the organization (physical or electronic).
- Transfer to an external storage facility (physical or electronic).
- Some records are deemed so important that they will never be destroyed (for example, due to their historical significance). Their “disposal” simply means that their status changes from active use or immediate relevance to historical preservation.

Lifecycle for Records

The lifecycle of a record goes through a number of stages.

Figure 2-1 Record life cycle



The **filing date** of a record is the date that a content item becomes a record. This often coincides with the check-in date because most records are checked into the content server as records. However, it is possible for an active content item that is already checked in to be marked as a record.

The **cutoff** of a record or non-record content item is the moment that the status of the item changes and the item goes into disposition. An item may be cut off after a specific period of time, at a specific event, or after a period of time after an event.

Types of Retained Content

Retained content can be divided into categories depending on the perspective:

- Internal and External Retained Content (page 2-7)
- Classified, Unclassified, Declassified Records (page 2-8)
- Non-Permanent, Permanent, Retained Content (page 2-8)

Internal and External Retained Content

An ***internal*** retained content item is an electronic item stored within Content Server and managed by Records Manager DoD Edition. An ***external*** retained content item can be in a variety of formats, both physical or electronic. If the source file is not specifically stored in Content Server, then it is considered external. Records Manager DoD Edition can then be used to manage the disposition schedule, search metadata associated with the external file, and even manage an electronic rendition of an external file. An electronic rendition can either be checked in as a primary file of an external record, or be filed as a separate file, and then linked to the external file metadata.

Classified, Unclassified, Declassified Records

Records (not non-record content) can be ***classified***, ***unclassified***, or ***declassified***.

Classified records are records that require protection against unauthorized disclosure (for example, because they contain information sensitive to the national security of the United States). Unclassified records are records that are not and have never been classified. Declassified records are records that were formerly classified, but whose classified status has been lifted.

A *classification* specifies the security level of a classified record. A *classification guide* provides default classification values for record check-in pages.

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

Important: Executive Order 12958: Classified National Security Information describes in detail the system for classifying, safeguarding, and declassifying national security information. This guide assumes you are familiar with proper classification protocols.

Non-Permanent, Permanent, Retained Content

For disposition purposes, records and non-record content items are categorized into ***non-permanent***, ***permanent***, and ***subject to review***. Most records and non-record content items fall into the non-permanent category. Non-permanent items are usually destroyed after a retention period. Permanent records are deemed important for continued preservation and are retained indefinitely (for example, because of their historical significance). Permanency does not apply to non-record content.

Records and non-records content items can be scheduled for periodic reviews. This can be used for DoD Vital Review of records.

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. This enables you to schedule lifecycles for content to eliminate outdated or superseded information, manage storage resources, or comply with legal audit holds.

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, Records Manager DoD Edition 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.

BASIC RETENTION MANAGEMENT CONCEPTS

The following concepts are important in the context of Records Manager DoD Edition:

- Retention Schedules (page 2-10)
- Series (page 2-10)
- Retention Category (page 2-10)
- Records Folder (page 2-11)
- Disposition (page 2-11)
- Disposition Instruction (page 2-11)
- Period (page 2-11)
- Trigger (page 2-11)
- Record or Non-Record Content Item Link (page 2-12)
- Classification (page 2-12)
- Classification Guide (page 2-12)
- Supplemental Marking (page 2-12)

- Freeze (page 2-12)

Retention Schedules

The retention schedule is an organized hierarchy of series, categories, and folders, which enables you to cluster records and non-record content into similar groups, each with its own retention and disposition characteristics (see the figure below).

Figure 2-2 Retention Schedule

Series

A series is an organizational construct in the retention schedule which enables you to organize categories into functional groups. This is especially useful if you have a multitude of categories. Series cannot contain records or non-record content items. A series can be nested, which means a series may contain other series.

Retention Category

A retention category is a set of security settings and disposition instructions in the retention schedule hierarchy, below a series. This enables you to organize records folders, records, and non-record content into groups with the same retention and disposition characteristics. A retention category may contain one or more records folders, records, or non-record content items, which then typically follow the security settings and disposition rules associated with that retention category. Retention categories cannot be nested, which means a retention category cannot contain other retention categories.

Records Folder

A records folder is a collection of similar records in the retention schedule. This enables records to be organized into groups. A records folder typically follows the security settings and disposition rules associated with its assigned retention category. Records folders can be nested, which means a records folder may contain other records folders. Records folders cannot contain non-record content.

Disposition

Disposition is the collective set of actions taken on records or non-record content items, usually for items that are no longer required. Disposition actions include wait times and activities such as transfer to external storage facilities, the destruction of temporary records or non-record content items, and the replacement of records or non-record content that is subject to review with updated information.

Disposition Instruction

A disposition instruction is created within a retention category, and typically consists of one or more disposition rules, which define how records or non-record content items are handled and what actions should be taken on them (for example, when and how they should be disposed of).

Period

A period is the segment of time that must pass before a review or disposition action can be performed. Records Manager DoD Edition comes with a number of built-in periods (for example, “one year”), but you can create custom periods to meet your unique business needs.

Trigger

A trigger is an event that needs to take place before a disposition instruction is processed. Triggers are associated with disposition rules for retention categories. Examples of triggering events include changes in status, completed processing of a preceding disposition action, and retention period cutoff.

Record or Non-Record Content Item Link

A record or non-record content item link is a defined relationship between records or non-record content items. This may be useful when items are related and need to be processed together. Links are available for content items that are stored both in and out of the retention schedule.

Classification

A classification specifies the security level of a classified record. It is used in the process of identifying and safeguarding records that contain sensitive information. Typical classification levels are “Top Secret,”, “Secret,” and “Confidential,” and “Unclassified.” Classification is not available for non-record content items.

Classification Guide

A classification guide is a mechanism used to define default values for a number of classification-related metadata fields on the content check-in pages for records (not non-record content). This enables convenient implementation of multiple classification schemes in Records Manager DoD Edition.

Supplemental Marking

Supplemental markings are extra attributes associated with a record (not non-record content). They can be used to clarify document handling in addition to standard document classifications, and also as a security feature to further restrict users from accessing records folders and records. Supplemental markings can be set at both the records folder and record level.

Freeze

Freezing a records folder, record, or non-record content item inhibits disposition processing for that item or the records in that folder. Frozen records or non-record content items cannot be altered in any way nor can they be deleted or destroyed. This may be necessary in order to comply with legal or audit requirements (for example, as a result of litigation). Freezing is available for records and non-record content items that are stored both in and out of the retention schedule.

Records Manager DoD Edition and Content Server

Records Manager DoD Edition supports the following Content Server layouts and search templates (which users can set in their user profile):

- Supported layouts:
  - Trays
  - Top Menus
- Supported search templates:
  - Headline View
  - Thumbnail View
  - My Headline View

Note: The Records Manager DoD Edition application does not support the Classic layout or the Classic View search template. This guide assumes you are using the Trays layout.

Basic Processes

The following steps outline the basic workflow of records and non-record content within Records Manager DoD Edition:

1. The retention schedule and any required components (such as triggers, periods, classifications, and custom security or metadata fields) are created.
2. Records and non-record content items are filed into the retention schedule by users. The filed items assume the disposition schedules of their assigned category.
3. Disposition rules are processed by Records Manager DoD Edition in accordance with the defined disposition schedules, which usually have a retention period. The processing is activated by either a system-derived trigger or custom trigger. The trigger could affect one or more records or non-record content items simultaneously.
4. Whenever a disposition event is due for action as activated by a trigger, an e-mail notification is sent to the person responsible for processing the events. The same is true for review. The pending events and reviews are displayed in the pages accessed from the My Retention Assignments links within the Records Manager DoD Edition user interface.

5. The records administrator or privileged user performs the review process. This is a manual process.
6. The records administrator processes the disposition actions in the pending events pages. This is a manual process.

Many disposition schedules are **time-based** according to a predictable schedule. Typically, records are filed and then destroyed a certain number of years later. The system keeps track of when the affected records or non-record content items are due for action. Notification e-mail is sent, and the records folders, records, and non-record content items are routed to the My Retention Assignments area of Records Manager DoD Edition.

The person responsible for the pending events and reviews then processes the record folders, records, or non-record content items accordingly. The particular disposition actions due are indicated for the record folders, records, or non-record content items. Available menu actions are context-sensitive according to the state of the item. For example, a records folder due for its final disposition step of destruction would have the Destroy commands available, but not the Archive commands.

In contrast, **time-event** and **event-based** dispositions must be triggered with a non-system-derived trigger; that is, a trigger that was defined for a particular scenario. When a pending legal case starts litigation, the records administrator must enable the custom trigger and set its activation date since the start date information is external to the Records Manager DoD Edition logic. Custom triggers enable you to define event and time-event based disposition actions based on the occurrence of a particular event.

Chapter

3

Browsing the Retention Schedule

Overview

This section covers the following topics:

- ❖ About Retention Schedules (page 3-1)
- ❖ Retention Schedule Hierarchy (page 3-2)
- ❖ Browsing the Retention Schedule (page 3-3)
- ❖ Viewing Series Information (page 3-4)
- ❖ Viewing Retention Category Information (page 3-5)
- ❖ Viewing Records Folder Information (page 3-7)
- ❖ Viewing Retained Item and Record Information (page 3-12)
- ❖ Generating a Retention Schedule Report (page 3-21)

About Retention Schedules

A retention schedule is an organized hierarchy of series, categories, and folders which allows you to cluster retained items and/or records into similar groups, each with its own retention and disposition characteristics. In Records Manager DoD Edition, there can be as many retention schedules as necessary for the requirements mandated by your organization. Retention schedules are set up to make it easy for you to accurately manage retained items and records.

When you file a retained item or record into a retention schedule, the disposition of that retained item or record is determined by the category into which it is filed, and security access and status of the retained item or record (such as whether or not the retained item or record is subject to review, or whether the record is permanent) is determined by the category or folder into which it is filed.

If you do not want the retained item or record to inherit the security and status of the category or folder, but want the retained item or record to be filed in a specific location, you can change the security or status during or after filing it.

RETENTION SCHEDULE HIERARCHY

A typical hierarchy of a retention schedule consists of series, categories, and/or folders. Series are optional, and may be used to organize retained items or records. Categories define the disposition instructions of the retained items or records and any folders it contains. Folders and subfolders inherit the disposition instructions from their parent category, but they can also have separate security settings that further limit access to the records in the folders.

Categories can be created within a series, but a category cannot be contained within another category, as the disposition rules for each category may conflict. Folders can be created within a category or another folder (but not a series). Records can be filed into a category or folder. Retained items (non-records) can be filed into categories but not filed into folders.

The figure below is an example of a typical retention schedule.

Figure 3-1 Basic retention schedule

BROWSING THE RETENTION SCHEDULE

You can browse content and navigate the hierarchy in the retention schedule using various techniques. Your permissions and security configuration determine what portions of the schedule you can view. You can navigate by:

- ❖ Accessing Retention Schedules Using the Browse Content Tray (page 3-3)
- ❖ Accessing Retention Schedules Using a Search Result (page 3-3)
- ❖ Accessing Retention Schedules Using Breadcrumb Trails (page 3-4)

Accessing Retention Schedules Using the Browse Content Tray

When you click the objects in the Browse Content area in Content Server, the tree expands or collapses. By default, retained items and records can be accessed in the retention schedule object.

Accessing Retention Schedules Using a Search Result

You can click the link in the Name column on a search results page to navigate to child objects. For example, clicking on the link “COMBATANT COMMAND, ETC.” shown in the figure below opens the corresponding Exploring Category page.

Figure 3-2 Name links and descriptions

Hover the mouse pointer over the name of a category or records folder to quickly view its description. Descriptions over 100 characters are truncated in the popup for easier viewing within the screen. To view the full description of a category or records folder, you must view it on the relevant information page. For more information, see Viewing Retention Category Information (page 3-5) and Viewing Records Folder Information (page 3-7). Series do not have descriptions.

Accessing Retention Schedules Using Breadcrumb Trails

The breadcrumb trail provides a convenient means of navigating a retention schedule. It shows where you are in the schedule hierarchy, and provides links that you can click to quickly move between parent and child levels.

Figure 3-3 Breadcrumb trail

For example, clicking "Series 0031 Combatant Command, etc. Correspondence" in the figure above opens the Exploring screen at the series level.

Viewing Series Information

To view information about a series in the retention schedule, complete the following steps:

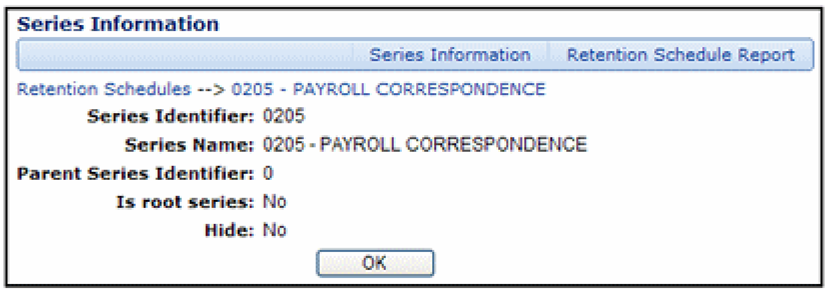
1. Open the **Browse Content** tray on the left and click the **Retention Schedules** link.

The Exploring Series “Retention Schedules” page is displayed.

2. Navigate to the series for which to see information.
3. In the row for the series, do either of the following:
   - Click the Info icon ( ).
   - Click the Actions icon ( ), and choose **Series Information** from the popup.

   The Series Information page (page 3-5) is displayed. This page shows relevant information about the selected series.

Figure 3-4 Series Information page



VIEWING RETENTION CATEGORY INFORMATION

You can view the following information about a category in the retention schedule:

❖ Viewing Category Information for a Retention Category (page 3-5)

❖ Viewing Disposition Information for a Retention Category (page 3-7)

Viewing Category Information for a Retention Category

To view category information about a retention category, complete the following steps:

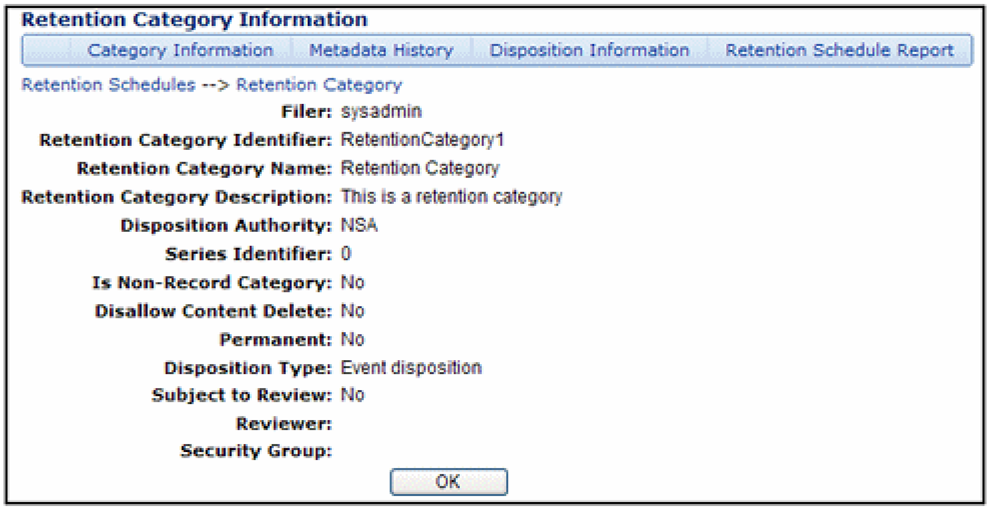
1. Open the **Browse Content** tray on the left and click the **Retention Schedules** link.

   The Exploring Series “Retention Schedules” page is displayed.

2. Navigate to the category for which to see information.
3. In the row for the category, do either of the following:
   - Click the Info icon ( ).
   - Click the Actions icon ( ), and choose **Category Information** from the popup.

The Category Information page (page 3-6) is displayed. This page shows relevant information about the selected category.

Figure 3-5 Category Information page



Viewing Metadata History for a Retention Category

Use this procedure to view the metadata history of a retention category (i.e., a list of all changes to the metadata of that retention category).

To view the metadata history for a retention category, complete the following steps:

1. Open the **Browse Content** tray and click the **Retention Schedules** link.

   The Exploring Series "Retention Schedules" page is displayed.

2. Navigate to the retention category for which to view disposition information.

3. In the row for the retention category, click the Actions icon ( ). A popup menu is displayed.

4. In the popup menu, click **Metadata History**.

   The Metadata History page is displayed.

5. When you are done viewing the disposition information, click **OK**.

Viewing Disposition Information for a Retention Category

The disposition instructions for a retention category define how retained items and records in that category are handled and what actions should be taken on them (for example, when and how they should be disposed of).

To view disposition information for a retention category, complete the following steps:

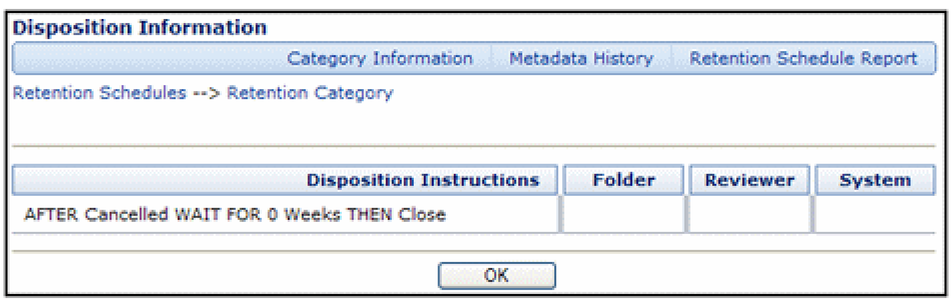
1. Open the **Browse Content** tray and click the **Retention Schedules** link.

   The Exploring Series “Retention Schedules” page is displayed.

2. Navigate to the retention category for which to view disposition information.
3. In the row for the retention category, click the Actions icon ( ). A popup menu is displayed.
4. In the popup menu, click **Disposition Information**.

   The Disposition Information page is displayed.

Figure 3-6 Disposition Information page



5. When you are done viewing the disposition information, click **OK**.

Note: The field captions on the disposition information may differ depending on whether your system administrator enabled user-friendly captions.

VIEWING RECORDS FOLDER INFORMATION

Folders are available only below Retention Categories that are for records (as opposed to non-records). Therefore, Folder Information is not available for non-record content.

This section contains these topics:

❖ Viewing Folder Information About a Records Folder (page 3-8)

❖ Viewing the Life Cycle of a Records Folder (page 3-10)

❖ Viewing the Recent Reviews of a Records Folder (page 3-11)

❖ Viewing the Metadata History of a Records Folder (page 3-11)

Viewing Folder Information About a Records Folder

To view information about a records folder, complete the following steps:

1. Open the **Browse Content** tray and click the **Retention Schedules** link.

   The Exploring Series "Retention Schedules" page is displayed.

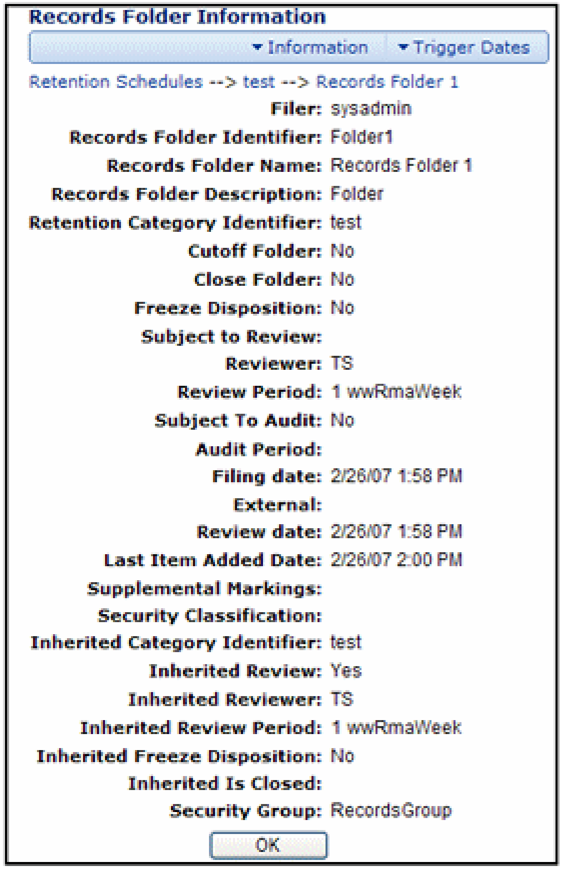
2. Navigate to the records folder to view information.

3. In the row for the records folder to view, do either of the following:

   - Click the Info icon ( ).
   - Click the Actions icon ( ), and choose **Information—Folder Information** from the popup.

   The Records Folder Information page (page 3-9) is displayed.

Figure 3-7 Records Folder Information page



The information displayed depends on the configuration for Records Manager DoD Edition, and whether optional fields were populated. The following information about a records folder is available:

- Filer.
- Records folder identifier, name, and description.
- Retention category identifier.
- Folder processing status, such as whether the folder is cut off, closed, or frozen.
- Whether the records folder is an external folder.
- Subject to review information, including any inherited characteristics.
- Date processing information, such as the date reviewed, date expired, date rescinded, date reviewed, etc.

- Other inherited information from parents, such as frozen dispositions or closed parent folders.
- Security permissions and groups.

Viewing the Life Cycle of a Records Folder

Use this procedure to view the life cycle (disposition schedule) of a records folder. The disposition instructions must be defined for the retention category of the records folder. Once a record folder has been cut off, the record folder begins disposition processing and cannot be edited.

To view the life cycle of a records folder, complete the following steps:

1. Open the **Browse Content** tray and click the **Retention Schedules** link.

   The Exploring Series "Retention Schedules" page is displayed.

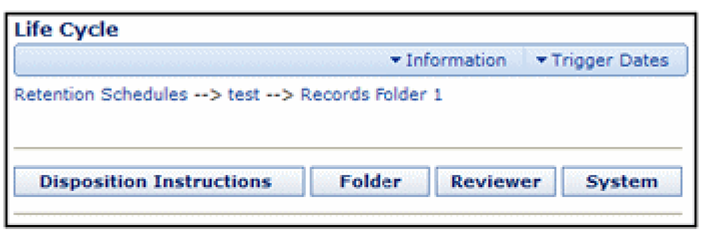
2. Navigate to the records folder whose life cycle you want to view.

3. In the row for the retention category, click the Actions icon (). A popup menu is displayed.

4. In the popup menu, click **Information—Life Cycle**.

   The Life cycle of a records folder page (page 3-10) is displayed.

Figure 3-8 Life cycle of a records folder page



The page shows the complete life cycle of the records folder according to its scheduled disposition, including the calculated dates of each disposition action. In the above example, the records folder is cut off on the date of the last entry, which is the triggering event. Then, after a six-year retention period, the records folder is destroyed.

Viewing the Recent Reviews of a Records Folder

Use this procedure to view the recent reviews of a records folder (i.e., a list of all users that marked that records folder as reviewed and when).

To view the review history of a records folder, complete the following steps:

1. Open the **Browse Content** tray and click the **Retention Schedules** link.

   The Exploring Series “Retention Schedules” page is displayed.

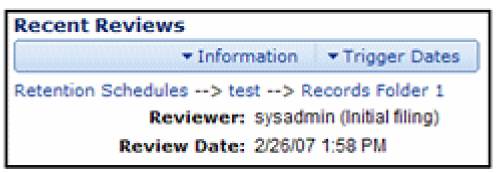
2. Navigate to the records folder whose metadata history you want to view.

3. In the row for the retention category, click the Actions icon (). A popup menu is displayed.

4. In the popup menu, click **Information—Recent Reviews**.

   The Recent Review page of the records folder is displayed.

Figure 3-9 Review history of a records folder



The page shows a list of everyone who has reviewed the records folder (and marked it as reviewed), together with the date and time of review.

Viewing the Metadata History of a Records Folder

Use this procedure to view the metadata history of a records folder (i.e., a list of all changes to the metadata of that records folder).

To view the metadata history of a records folder, complete the following steps:

1. Open the **Browse Content** tray and click the **Retention Schedules** link.

   The Exploring Series “Retention Schedules” page is displayed.

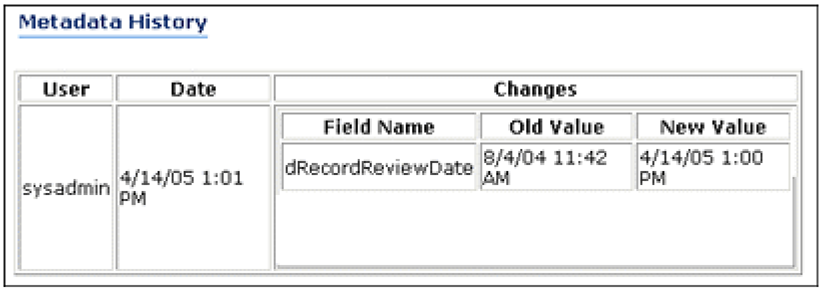
2. Navigate to the records folder whose metadata history you want to view.

3. In the row for the retention category, click the Actions icon (). A popup menu is displayed.

4. In the popup menu, click **Information—Metadata History**.

   The Metadata history of a records folder page (page 3-12) is displayed.

Figure 3-10 Metadata history of a records folder page



The page shows an overview of all changes made to the editable properties of the records folder, together with the affected metadata field name, the modification date and time, and the old and new values. In the above example, on 4/14/05, the user 'sysadmin' set the expiration date of the records folder by changing the field from 8/4/04 to 4/14/2005. This, in turn, also set the obsolete date, because an expired record automatically becomes obsolete.

VIEWING RETAINED ITEM AND RECORD INFORMATION

This section has these topics:

- Viewing the Content Information of a Retained Item or Record (page 3-13)
- Viewing the Life Cycle of a Retained Item or Record (page 3-17)
- Viewing the Recent Reviews of a Retained Item or Record (page 3-17)
- Viewing the Metadata History of a Record (page 3-18)
- Viewing the Classified Metadata History of a Record (page 3-19)

Viewing the Content Information of a Retained Item or Record

To view the content information of a retained item or record, complete the following steps:

1. Locate the retained item or record whose review history you want to view, either by browsing or searching.
2. On the search results page, click the Info icon ( ) of the retained item or record.

   The Content Information page for the retained item or record is displayed.
3. In the **Information** menu, click **Content Information**.

   The Review History for '<*Item_Title*>' page is displayed.

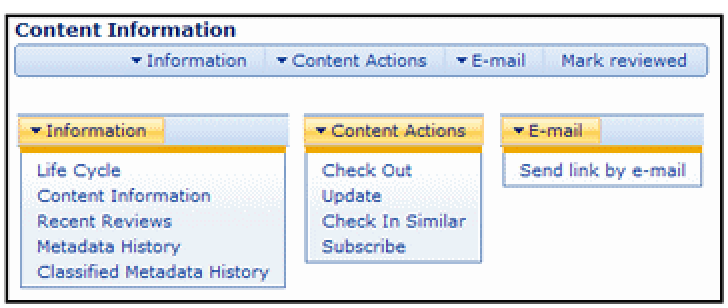
The page has the following main features:

- Toolbar Menus (page 3-13)
- Content Information Area (page 3-14)
- Correspondence Fields Area (page 3-15)
- Links Area (page 3-16)
- Revision History Area (page 3-16)

Toolbar Menus

The **Actions** drop-down menu in the topright corner of the information page provides access to a number of tasks that can be performed on the current retained item or record.

Figure 3-11 Toolbar menus on information page for retained item or record



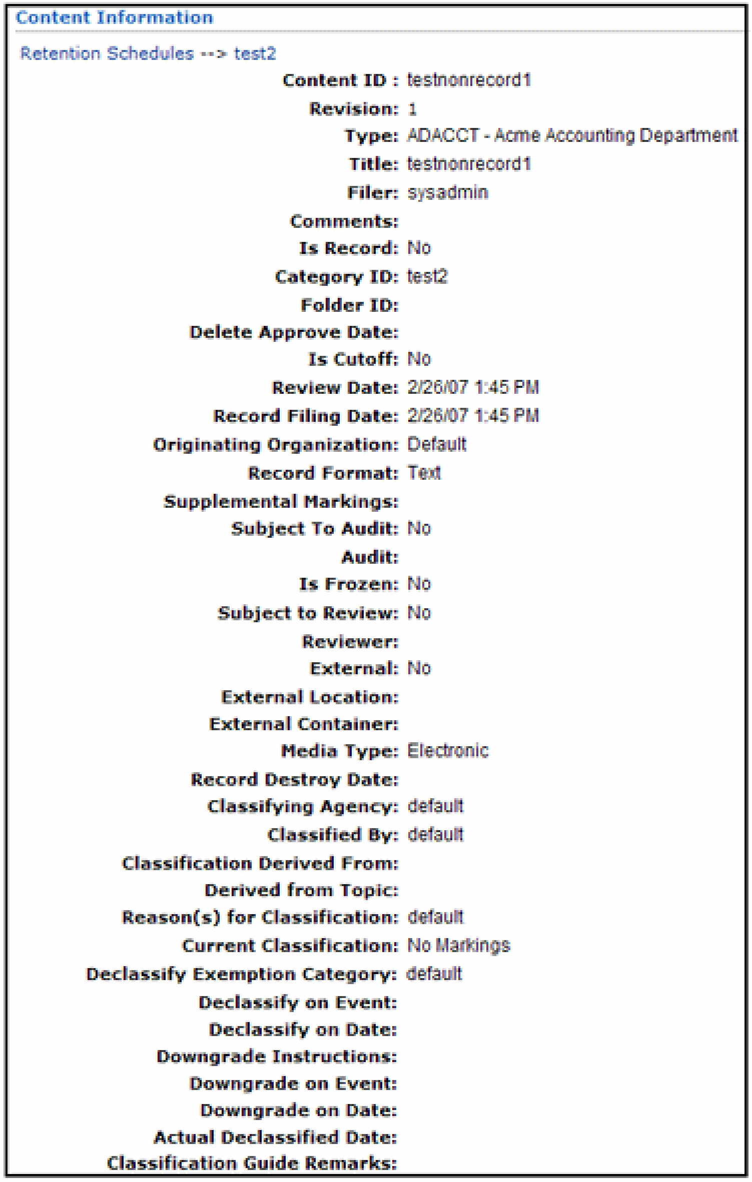
The available tasks depend on a number of factors such as the retained item or record properties, classification level, security restrictions, etc. A typical user will generally have the following options:

- **Checking out** a retained item or record properties (see the *Content Server User Guide*)
- **Updating** the retained item or record (see the *Content Server User Guide*)
- **Checking in a similar** retained item or record (see the *Content Server User Guide*)
- **Subscribing** to the current retained item or record (see the *Content Server User Guide*)
- **Sending link by e-mail** (see the *Content Server User Guide*)
- **Marking** the retained item or record as reviewed. To update the retained item or record and mark it as reviewed, you must be assigned review privileges.
- Viewing the Life Cycle of a Retained Item or Record (page 3-17)
- Viewing the Recent Reviews of a Retained Item or Record (page 3-17)
- Viewing the Metadata History of a Record (page 3-18)
- Viewing the Classified Metadata History of a Record (page 3-19)

Content Information Area

This area provides filing information about the retained item or record, including content ID, title, filer, and publication date. For further details on the standard content information metadata, refer to the *Content Server User Guide* and online help system.

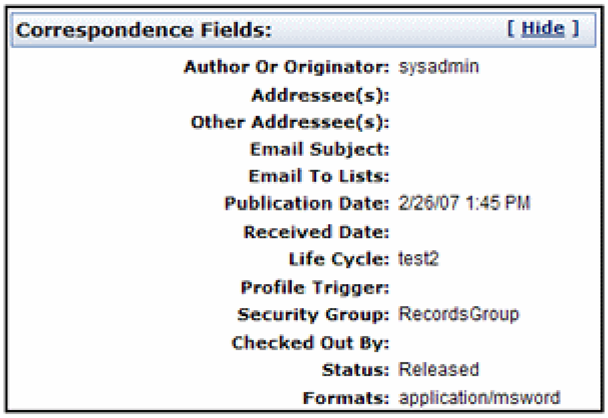
Figure 3-12 Content information section of information page for retained item or record



Correspondence Fields Area

This area provides information about the content item's author along with various related addresses, as well as additional information about the current status of user accesses. The available Show/Hide toggle switch enables you to display or conceal author information.

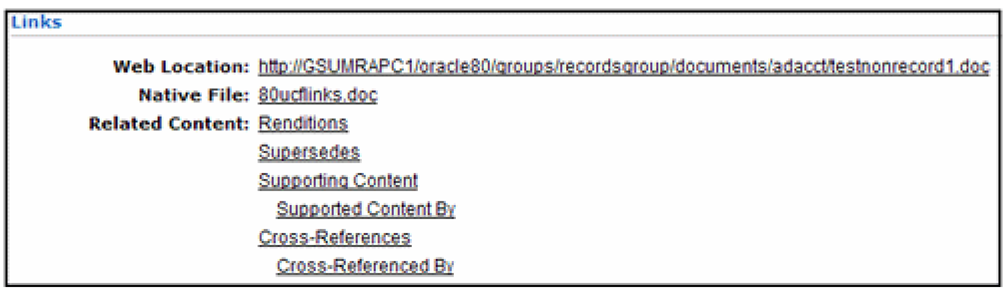
Figure 3-13 Correspondence Fields section of information page for retained item or record



Links Area

This area provides links to the native and web-viewable retained item or record files, as well as a number of retention management links.

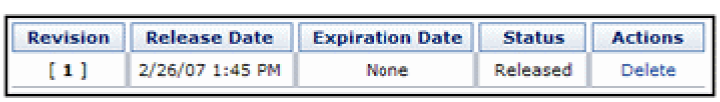
Figure 3-14 Links section of information page for retained item or record



Revision History Area

This area provides release information about the current retained item or record. The revision history for records will generally only have one revision, as they typically do not change.

Figure 3-15 Revision History section of information page for retained item or record



Revision	Release Date	Expiration Date	Status	Actions
[1]	2/26/07 1:45 PM	None	Released	Delete

Viewing the Life Cycle of a Retained Item or Record

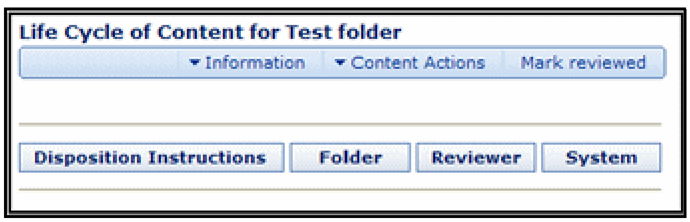
To view the life cycle of a retained item or record, complete the following steps:

1. Locate the retained item or record whose life cycle you want to view, either by browsing or searching.
2. On the search results page, click the Info icon ( ) of the retained item or record.

   The Content Information page for the retained item or record is displayed.
3. In the **Information** menu, click **Life Cycle**.

   The Life Cycle for '<*Item_Title*>' page is displayed.

Figure 3-16 Life cycle of a retained item or record



The page shows the complete life cycle of the retained item or record according to its scheduled disposition, including the calculated dates of each disposition action.

Viewing the Recent Reviews of a Retained Item or Record

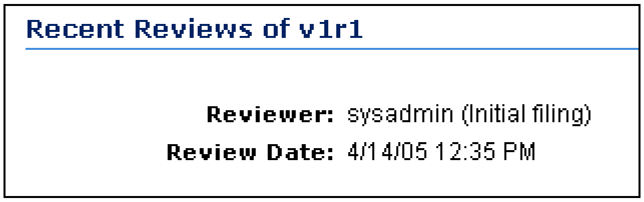
To view the recent reviews of a retained item or record, complete the following steps:

1. Locate the retained item or record whose review history you want to view, either by browsing or searching.
2. On the search results page, click the Info icon ( ) of the retained item or record.

   The Content Information page for the retained item or record is displayed.
3. In the **Information** menu, click **Recent Reviews**.

   The Review History for '<*Item_Title*>' page is displayed.

Figure 3-17 Review history of a retained item or record



The page shows a list of everyone who has reviewed the retained item or record (and marked it as reviewed), together with the date and time of review.

Viewing the Metadata History of a Record

Note: Viewing metadata history is available for records and for non-record content that is checked into a retention schedule. It is not available for content that is not in a retention schedule.

To view the metadata history of a record or non-record content item, complete the following steps:

1. Locate the record or non-record content item whose metadata history you want to view, either by browsing or searching.
2. On the search results page, click the Info icon ( ) of the record.

   The Content Information page for the record or non-record content item is displayed.
3. In the **Information** menu, click **Metadata History**.

   The Metadata History page is displayed.

Figure 3-18 Metadata history of a retained item or record

The page shows an overview of all changes made to the editable properties of the record or non-record content item, together with the affected metadata field name, the modification date and time, and the old and new values.

Viewing the Classified Metadata History of a Record

Note: Classification is for records only (not non-record content). Therefore, this task applies only to managed records.

To view the classified metadata history of a record, complete the following steps:

1. Locate the record whose classified metadata history you want to view, either by browsing or searching.
2. On the search results page, click the Info icon ( ) of the record.

   The Content Information page for the retained item or record is displayed.
3. In the **Information** menu, click **Classified Metadata History**.

   The Classified Metadata History for '<*Record_Title*>' page is displayed.

Figure 3-19 Classified metadata history of a record

Metadata history for 'recordstest'

User	Date	Details	Comments	Field Name	Old Value	New Value
sysadmin	8/19/04 2:33 PM	Declassified Record	ljones	xDeclassifiedBy		ljones
				xDeclassifiedOn		8/20/14 12:00 AM
sysadmin	8/17/04 3:53 PM	Upgraded Classification	None	xClassifiedUpgradedBy		Victor
				xClassifiedUpgradedOn		8/17/04 12:00 AM
sysadmin	8/17/04 3:53 PM	Review Record Classification		xClassifiedReviewedBy		VicVictor
				xClassifiedReviewedOn		8/18/04 12:00 AM
sysadmin	8/4/04 9:03 AM	Review Record Classification		xClassifiedReviewedOn		8/10/04 12:00 AM
				xClassifiedReviewedBy		Owuor

This page shows a list of all changes made to the security classification of the record. The following information is provided:

- The user who made the change
- The timestamp when the change was made
- The old classification level
- The new classification level
- The specified reason for the classification change

GENERATING A RETENTION SCHEDULE REPORT

Use this procedure to generate retention schedule reports for retained items and/or records. You generate a report at any time for any portion of the retention schedule to which you have permissions. A retention schedule report contains the following information:

- Series name, if applicable
- Category identifier and name
- Subject to review and permanent retained items or record status
- Disposition authority and instructions

To generate a report, complete the following steps:

1. Open the **Browse Content** tray on the left and click the **Retention Schedules** link.

   The Exploring Series “Retention Schedules” page is displayed.
2. Check the box corresponding to the item for which to run a report.
3. Navigate to the series, category, or records folder to create a report for.
4. In the row for the series, category, or records folder, click the Actions icon ( ).
   A popup menu is displayed.
5. Choose **Retention Schedule Report** from the popup menu.
6. A retention schedule report is generated and displayed in a new browser window.

Figure 3-20 Sample retention schedule report

Retention Category Identifier	Retention Category Information
0310-03	**Retention Category Name:** Classification Guides **Disposition Authority :** N1-218-00-4 item 011 **Is Non-Records Category :** No **Permanent :** No **Subject to Review:** Yes **Reviewer :** **Review Period :** 1 Calendar Years **Retention Category Description:** Information relating to the security classification or grading system involving the classification or downgrading of information, including correspondence or memorandums and reports on secruity classification, excluding other files described in this records series. Which are: maintained at offices in charge of issuance.
	Disposition Instructions
	Triggering Event : Declassified date **Retention Period :** 0 **Disposition Action :** Cutoff
	Triggering Event : 1 **Retention Period :** 10 Calendar Years **Disposition Action :** Destroy

7. You can print or save the report. Close the browser window when done.

Note: The report is generated in either PDF or HTML form, depending on how your system administrator configured the system. If the generated file is in PDF format, it cannot be viewed using Adobe Acrobat 5.*x* or earlier. You need at least version 6.0 of the Acrobat software.

Chapter

4

CREATING RECORDS AND NON-RECORD CONTENT FOR RETENTION

OVERVIEW

This section describes these topics:

- Background (page 4-1)
- Checking In From Content Server's Main Menu (page 4-2)
- Select Retention Categories or Folders Page (page 4-16)
- Checking In From Within Retention Schedules (page 4-18)
- Filing a Record into Multiple Records Folders (page 4-21)
- Checking In an External Record (page 4-22)
- Checking In a Classified Record (page 4-23)
- Checking In E-Mail for Retention (page 4-25)

BACKGROUND

You can create records and non-record content items from the main menu of Content Server, from within retention schedules, or you can mark existing content within the content server as a record.

For example, if you work with Content Server to manage content outside of a retention schedule, you can file content into a retention schedule without moving outside of Content

Server. You do this by accessing the content check-in form from the main Content Server menu.

If you work mostly within retention schedules and are within a schedule hierarchy, you can create the record or non-record content item at your current position in the hierarchy by choosing Create Record or Check in New Content Item from the Action drop-down menu.

If a content item exists within Content Server (for example, something that has just completed a workflow process), you can convert the content item to a record without having to create a new item.

Checking In From Content Server's Main Menu

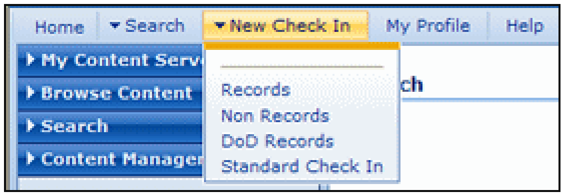
This section describes these topics:

- New Check In Menu Options (page 4-2)
- Check In Page Metadata Fields (page 4-3)
- Records Fields (page 4-6)
- Security Markings Fields (page 4-8)
- Vital Review Fields (page 4-12)
- Correspondence Fields (page 4-12)
- Date Fields (page 4-13)
- Classification Guides (page 4-15)
- Checking In Record or Non-Record Content (from Main Menu) (page 4-15)

New Check In Menu Options

When you install Records Manager DoD Edition the New Check In menu options in Content Server are changed. You can use these menu options to choose the type of checkin to perform.

Figure 4-1 Records Manager DoD Edition New Check In menu options



In additon to the standard check in form, you can use one of the following types of forms to check in record or non-record content items using Content Server's New Check In menu:

- Records
- Non Records
- DoD Records
- Standard Check In

Check In Page Metadata Fields

The metadata fields that are included in the selected check in form are dependent on the components that are enabled and the profiles that are used. The metadata fields included and described in the following table are representative of those that may be included in the check in form that you select.

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Content ID field*</td><td>The unique identifier for the content item.
❖ Duplicate names are not allowed.
❖ Maximum length is 30 characters.
❖ The following are not acceptable: spaces, tabs, linefeeds, carriage returns, and symbols ; ^ ? : @ & + " # % < > * ~ |
Note: If a content ID is already filled in or if this field is not displayed, the system is set up to automatically generate content IDs.</td></tr>
</table>

Field	Description
Type field (hidden by default)	The type (department) of the file. You must select from a list of predefined values. This is required, but is pre-filled and hidden by default for all content or records.
Title field*	A descriptive name identifying the revision. ❖ Maximum length 80 characters. ❖ Required
Filer field*	The user who created or revised the content item. Depending on how your system is set up, you might be able to select from a list of users. This value can be changed only if you have administrative permission. Required.
Security Group field*	The security group is a set of files with the same access permission. ❖ Default: RecordsGroup. ❖ Required.
Primary File field*	The path and file name of the native file being checked in. ❖ Maximum length is 80 characters. ❖ The maximum file extension length (after the period) is eight characters. ❖ Click the Browse button to navigate to and select the file.

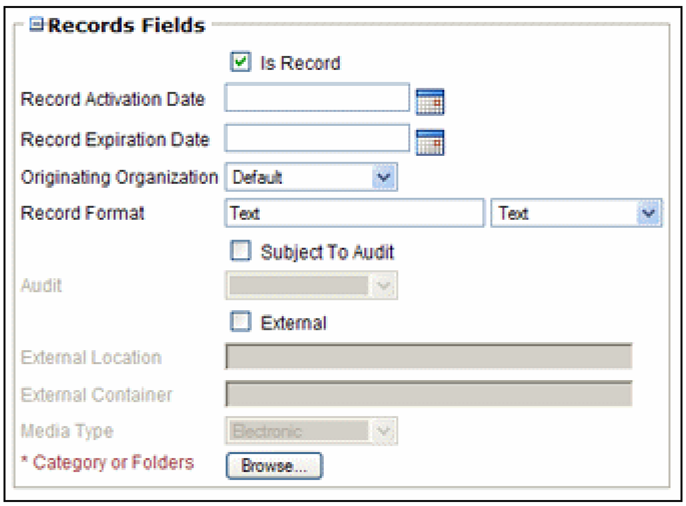
Field	Description
Alternate File field	The path and file name of an alternate web-viewable file or a file that can be converted to web-viewable format. ❖ The file extension (after the period) cannot be the same as that of the Primary file (for example, both files cannot end in *.doc*). ❖ Maximum length is 80 characters. ❖ The maximum file extension length (after the period) is eight characters. ❖ Click the Browse button to navigate to and select the file. ❖ Optional.
Revision field (hidden by default)	The revision increments automatically with each check-in of the content item, so generally, you should not change this value. This is required, but is pre-filled and hidden by default for all records. Most records do not track revisions, and so this value is almost always 1 on record items.
Comments field	Additional notes about the file. ❖ Maximum length is 255 characters. ❖ Optional.
Records Fields section	When expanded, the Records Fields (page 4-6) are displayed.
Security Markings Fields section	When expanded, the Security Markings Fields (page 4-8) are displayed.
Vital Review Fields section	When expanded, the Vital Review Fields (page 4-12) are displayed.
Correspondence Fields section	When expanded, the Correspondence Fields (page 4-12) are displayed.
Date fields section	Thes Date Fields (page 4-13) are displayed.

Field	Description
Custom fields	Any custom metadata fields for your system are displayed on this page.
* = Depending on the type of check-in form that you are using, these fields are required.	

Records Fields

The Records, DoD Records, and Standard Check In forms include the following records-related fields:

Figure 4-1 Records Fields section



Field	Description
Is Record check box	Indicates the content is to be marked and handled as a record. Select the check box to check in a record; clear the check box to check in a document that is not treated as a record.
Record Activation Date	The date that a record is activated in the system. Optional
Record Expiration Date	The date the record expires in the system. Optional.

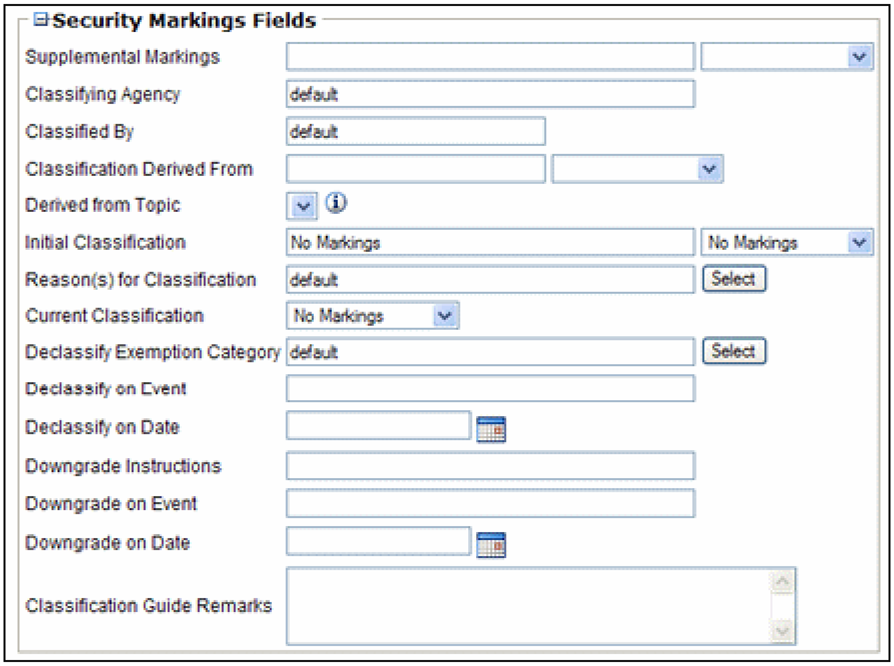
Field	Description
Originating Organization	The official name or code that identifies the office responsible for creating the record. The records administrator must populate this list. The install guide gives instructions for populating and customizing this option list. ❖ Maximum length: 100 characters.
Record Format	The format of the record you are filing. Options are designated by your system administrator.
Subject to Audit check box	Selecting this check box specifies that the record is subject to audit, and is included in the indirect audit approval trigger. Selecting this check box enables the Audit period list (page 4-7). Clear the check box if the record is not subject to the audit approval indirect trigger.
Audit period list	If the record is subject to the Audit Approval built-in indirect trigger, select the period from the list.
External check box	Indicates whether a record is a physical record external to the records management system. Selecting this check box enables the External Location, Container, and Media Type fields. Select this check box if the record is a physical record external to Records Manager DoD Edition.
External Location	Enter a description of the physical external location of the physical record, such as "Warehouse A." The Is External check box must be selected to enable this field. ❖ Maximum length: 100 characters. ❖ Required.

Field	Description
External Container	Enter a description of the physical external location of the container of a physical record, such as “File Cabinet 56, Row WW.” The Is External check box must be selected to enable this field. ❖ Maximum length: 30 characters. ❖ Optional.
Media Type	Enter a description of the material on which the information is inscribed, such as microform, hard-copy paper, film, audio tape, electronic, and so on. The records administrator must populate this list. The install guide gives instructions for populating and customizing this option list. ❖ Optional.
Category or Foldersyj	Click the Browse button to select the retention category (for records or non-record content) or records folder (for records) in which to file the item. The Select Retention Category or Folder screen is displayed.

Security Markings Fields

The Records, DoD Records, and Standard Check In forms include the following security markings-related fields:

Figure 4-2 Security Markings Fields section



Field	Description
Supplemental Markings	Select one or more supplemental markings that are applied at the record level. Optional.
Classifying Agency	Executive agency classifying the record. For example, the President, agency head and officials designated by the President, and so forth.
Classified By	Person classifying the record. This is required if *Classification Derived from* is not populated.

Field	Description
Classification Derived From	Classification guide(s) from which the classification of the records is derived. This is mandatory if the *Classified by* field is blank. If this field is used, suggested values for the following fields are displayed automatically to facilitate uniformity, but you can change them: ❖ Initial classification ❖ Reason(s) for classification ❖ Declassify exemption category ❖ Declassify on event ❖ Declassify on date
Derived From Topic	Topic associated with a classification guide that is used to derive classification. This is an option list whose values are dependent on the *Classification Derived from* field. The information icon to the right of the list presents the description of the selected topic.
Initial Classification	Classification at time of record creation. Required for classified content. This is entered automatically if the classification is derived from a source, multiple sources, or a topic. The available options include: ❖ Top Secret ❖ Secret ❖ Confidential ❖ No Markings ❖ Any custom classification as defined by your organization
Reason(s) for Classification	Specification for classification. Required if Classified by field is populated; otherwise, optional. This is entered automatically if the classification is derived from a source, multiple sources, or a topic. This is an automatically populated custom option list with values varying by organization.

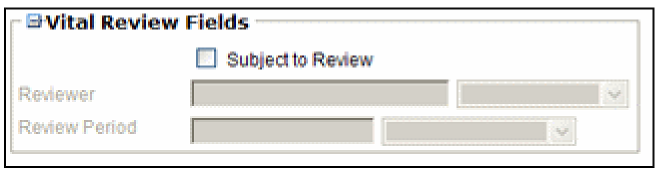
Field	Description
Current Classification	The classification given to the record.
Declassify Exemption Category	A category that exempts the record from being declassified after the standard declassification period (as defined by the records administrator; typically 10 years)—for example, reveal an intelligence source, compromises US military plans, etc.
Declassify on Event	An event triggering the declassification of a record automatically. Classified content requires *Declassify on event, date*, or both fields to be completed. This may be entered automatically if the classification is derived from a source, multiple sources, or a topic. For information on declassification, refer to the *Records Manager DoD Edition System Administration Guide*.
Declassify on Date	A date triggering the automatic declassification of a record. This may be entered automatically if the classification is derived from a source, multiple sources, or a topic. For information on declassification, see the *Records Manager DoD Edition System Administration Guide*.
Downgrade Instructions	Instructions on how a record can be downgraded if it is subject to downgrading. This is required if there is a *Downgrade on event* or *Downgrade on date* or a combination of both.
Downgrade on Event	An event triggering the automatic downgrading of a record classification. For information on downgrading, see the *Records Manager DoD Edition System Administration Guide*.
Downgrade on Date	A date triggering the automatic downgrading of a record classification. For information on downgrading the *Records Manager DoD Edition System Administration Guide*.

Field	Description
Classification Guide Remarks	Text describing the classification guide usage. Optional.

Vital Review Fields

All of the check-in forms include the following vital review-related fields:

Figure 4-3 Vital Review Fields section

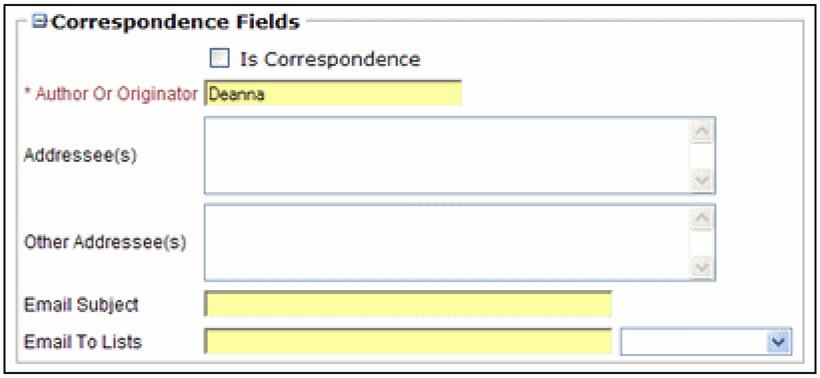


Field	Description
Subject to Review	Select this check box if the item is subject to review. Selecting this check box enables the Reviewer and Review Period fields. Review items are defined by your organization as needing to be reviewed by a specified person within a specified time frame. Do not select the check box if this is not considered an item which must be reviewed.
Reviewer	Select a reviewer from the list. The reviewer list is a list of people, defined by your record administrator, who have access to this review item. The reviewer receives notifications.
Review Period	Select the period from the list.

Correspondence Fields

All of the check-in forms include the following correspondence-related fields:

Figure 4-4 Correspondence Fields section



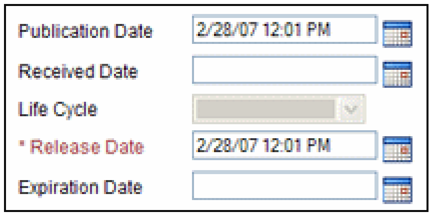
Field	**Description**
Is Correspondence	Enabling displays additional metadata fields. Used if a record or non-record content item is an e-mail being checked in via Outlook Integration.
Author or Originator	Specifies from whom the e-mail was sent. If the Is Correspondence check box is disabled, enter the content author or originator.
Addressee(s)	Specifies to whom the e-mail was sent.
Other Addressee(s)	Specifies any additional people who were copied on the original e-mail.
Email Subject	Displays the subject line of the original e-mail.
Email To Lists	Displays any alias lists used in the original e-mail.

Date Fields

Note: To ensure that Records Manager DoD Edition manages non-record content with a disposition plan, note that a Life Cycle field is available in this portion of the check-in page when the Is Record check box (page 4-6) remains disabled. The Life Cycle field enables you to specify disposition instructions for non-record content. You can only access those life cycles which you have been given permission to work with. See the *Records Manager DoD Edition System Administration Guide* for more information.

All of the check-in forms include the following date-related fields:

Figure 4-5 Date fields section



Field	Description
Publication Date	Displays the date an e-mail was initially sent.
Received Date	Displays the date an e-mail was received.
Life Cycle	If the Is Record check box (page 4-6) is not selected, the Life Cycle drop-down list is activated. The Life Cycle field enables you to specify disposition instructions for non-record content to determine how the content will be handled. You can only access those life cycles which you have been given permission to work with. See the *Records Manager DoD Edition System Administration Guide* for more information.
Release Date (hidden by default)	The date and time that the revision is available for viewing. ❖ Defaults to the date and time the file is checked in. ❖ If another date is entered, the revision remains in DONE status until the specified date. ❖ The date is required; the time is optional. This is required but is pre-filled and hidden by default.

Field	Description
Expiration Date	The date and time that the revision will no longer be available for viewing in the content server. ❖ Upon expiration, the revision is not deleted, but it can be accessed only by an administrator. ❖ If a value is entered, the date is required; the time is optional.

Classification Guides

Classification guides (and their associated topics) enable convenient implementation of multiple classification schemes in Records Manager DoD Edition for records. They are used to define default values for the following classification-related metadata fields on the content check-in page:

- Initial classification
- Reason(s) for classification
- Declassify exemption category
- Declassify on event
- Declassify on date

This makes checking in classified records easier and more consistent, with similar records having the same classification metadata.

Note: The default metadata field values associated with a classification topic are suggestions only; they can be overridden, if desired.

Checking In Record or Non-Record Content (from Main Menu)

Use this procedure to create a record, or check in new content. Records can be checked into a category or a records folder. Non-record content items can be checked into a category.

Tech Tip: Use this method of filing records or non-record content items when you are filing items to disparate locations and have to navigate to a different location within the retention schedule with each check in.

To check in from the main menu, complete the following steps:

1. Click **New Check In** on the toolbar or under the Content Management tray.

   The applicable checkin page is displayed.

2. (Optional) Enable the **Is Record** check box to indicate the content is a record.

   The records-related fields are displayed

3. Enter optional information pertinent to the record or non-record content item. See Check In Page Metadata Fields (page 4-3) for information about metadata fields.

4. Click **Browse** next to the **Category or Folders** field. Remember folders are available only for records, and not for non-record content items.

   The Select Retention Categories or Folders Page (page 4-16) is displayed.

5. Choose the category or folders in which to file your item.

   The file paths are displayed in the text field on the page.

6. (Optional) To create a classified record, refer to Checking In a Classified Record (page 4-23).

7. To preview the life cycle of the new item before actually checking it into the content server, click **Lifecycle Preview** at the bottom of the content check-in page. This opens a page showing the life cycle that the item will go through based on the current selections on the content check-in page.

8. After you enter all the appropriate metadata values, click **Check In**.

   Upon successful check-in, the check-in confirmation page is displayed.

For more detailed information on checking in content, refer to the online help or the *Content Server User Guide*.

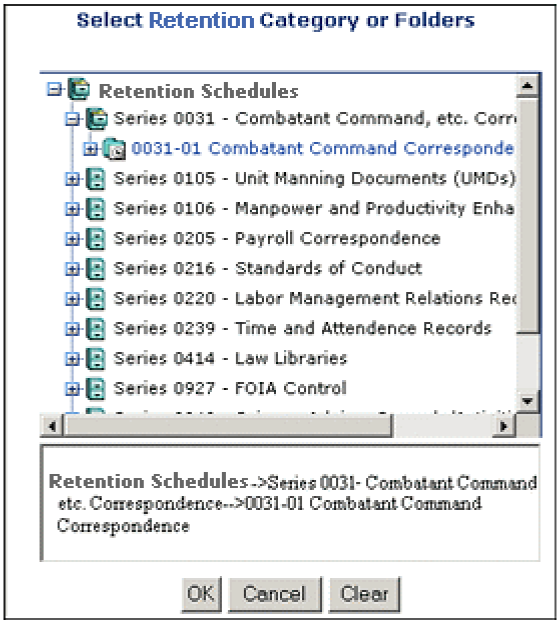
Note: Classification guides are available for records only. They do not pertain to non-record content.

SELECT RETENTION CATEGORIES OR FOLDERS PAGE

Use this screen to select one category into which to file a record or non-record content item, or to select one or more records folders in which to file a record. This screen is displayed when you click the **Browse** button for the Category or Folders field on the content check-in form that is accessed from the Main Menu.

Note: Folders are for records only. They do not pertain to non-record content.

Figure 4-6 Select Retention Category or Folders dialog



Important: File your content carefully. Categories determine the disposition of a record or non-record content item, so you cannot check in items to more than one category. However, you can check in records to more than one folder, and those folders might be in separate categories with different disposition schedules. The record or non-record content item is processed by all disposition rules within a schedule; however, the rule with the longest retention period, if applicable, takes precedence. For event dispositions, the date furthest in the future takes precedence. Disposition processing precedence for records filed into multiple folders belonging to disparate categories is described in the *Records Manager DoD Edition System Administration Guide*. If you have questions regarding your filing policies, see your Records Manager DoD Edition administrator.

To select retention categories or folders, complete the following steps:

1. To open the retention schedule, click either the plus (+) sign or the icons to open the series. Continue to click and expand the tree to the desired location.
2. Click a category or folder to select it. You can select multiple folders but not select multiple categories. The retention categories and folders you can select are indicated in red text. The breadcrumb trail for the selected location appears in the box.

3. Click **OK** when you are finished selecting either a retention category, or one or more records folders.

CHECKING IN FROM WITHIN RETENTION SCHEDULES

When you create a record by checking it in from within Records Manager DoD Edition, you do not need to set the Is Record flag, because whether you are checking in a record is dependent on the category into which you check the record. Additionally, for records you do not need to navigate to the location from the Select Retention Category or Folders screen, because you are already at the location in which to create the record. For non-records, tThe Life Cycle field is not displayed. This metadata field will be automatically populated with the non-records category disposition, and it will be visible from the Content Information page. Note the breadcrumbs at the top of the check-in form that inform you of your current location within the retention schedule.

Note: Non-records content can be checked into the retention schedule in a non-records category. Non-records can't be checked into folders.

This section describes these topics:

❖ Checkin Page Metadata Fields (within Retention Schedule) (page 4-18)

❖ Checking in Record or Non-Record Content (within Retention Schedule) (page 4-19)

Checkin Page Metadata Fields (within Retention Schedule)

Use the check-in form available from within retention schedules to check in records or non-record content items. This form enables you to create a record or non-record content item in context; that is, at your present location. For more detailed information about the individual metadata fields included on this checkin form, see Check In Page Metadata Fields (page 4-3).

To access this form, navigate in the retention schedule to the category or folder in which to create the item, and click **Create Record** or **Check in New Content Item** in the **Actions** list. You need permission to the schedule as well as access to the category or folder.

Checking in Record or Non-Record Content (within Retention Schedule)

Use this procedure to create a record or check in a non-record content item from within a retention schedule by placing it directly into a category (or records folder if a record). You must have the proper security privileges to access the category or records folder.

Tech Tip: To save time when filing multiple content items into the same category or folder, check in the content from within the retention schedule this way. It eliminates the need to select the Is Record field and the Category or Records Folder ID fields to navigate to the location each time because the Check In Form is presented in context to its location as displayed in the Retention Schedule bread crumb trail. To further expedite the filing process, you can use the Check In Similar feature.

To create a record or non-record content item within the retention schedule, complete the following steps:

1. Open the **Browse Content** tray and click the **Retention Schedules** link.

   The Exploring Series “Retention Schedules” screen is displayed.

2. Navigate to the category or records folder in which to create a record or non-record content item. Remember, folders can contain only records, not non-record content.

3. From the main **Actions** list, click **Create Record** or **Check in New Content Item**.

   The Checking In From Within Retention Schedules (page 4-18) is displayed.

4. (Optional) To create a classified record, refer to Checking In a Classified Record (page 4-23).

5. If your content ID is not automatically generated, then enter a unique identifier in the Content ID field.

6. From the **Type** list, select the option that best describes the file.

7. Enter a descriptive title in the **Title** field.

8. From the **Security Group** list, select the security group for the content item. Keep in mind that this content item is available to users who have permission to the specified security group.

9. If accounts are enabled for your system, select an option from the **Account** list, or enter a new account name. Keep in mind that this content item is available to users who have permission to the specified account.

10. Specify a **Primary File** using either one of the following methods:

- Click **Browse** next to the Primary File field. Navigate to and select the native file, and then click **Open**.
- Enter the complete path name and file name of the native file in the Primary File field (for example, *c:/My Documents/ABC Project/MyFile.doc*).

11. If the **Format** field is displayed under the Primary File field, select the conversion format for the file.
    - If the **use default** option is selected, the product converts the file format based on its file name extension.
    - If any other option is selected, the product ignores the file extension and uses the selected format to determine how to convert the file.
12. Specify an **Alternate File** by browsing or entering the path name and file name. The alternate file must have a different file extension than the primary file. The alternate file is typically in a web-viewable format or a format that can be converted to a web-viewable file, such as *.pdf*, *.txt*, *.doc*, and so forth.
13. If the **Format** field is displayed under the Alternate File field and you specified an Alternate file, select a conversion format for the file.
    - If the **use default** option is selected, the product converts the file format based on its file name extension.
    - If any other option is selected, the product ignores the file extension and uses the selected format to determine how to convert the file.
14. Accept the default revision in the **Revision** field. You should change the revision only if there is a specific reason to do so.
15. Enter any notes about the file in the **Comments** field.
16. Use the default release date, or enter a future release date in the **Release Date** field.
17. To make the file unavailable in the content server on a particular date, enter a date in the **Expiration Date** field.
18. If applicable, fill in any custom metadata fields required by your organization.
19. To preview the life cycle of the new record or non-record content item before actually checking it into the content server, click **Lifecycle Preview** at the bottom of the content check-in page. This will open a page showing the life cycle that the record or non-record content item will go through based on the current selections on the content check-in page.
20. After you enter all the appropriate metadata values, click **Check In**.

    Upon successful check-in, the check-in confirmation page is displayed.

21. If you have similar additional information to file, click **Check In Similar** to pre-populate the Check In Form and expedite the check in process. For more detailed information, see the online help or the user guide for Content Server.

Filing a Record into Multiple Records Folders

Use this procedure to file a record into multiple records folders. You must use the check-in form accessed from Content Server's main menu to file into multiple records folders.

Note: Folders are for records only. They do not pertain to non-record content.

Important: File your records carefully. Categories determine the disposition of a record, so you cannot check in records to more than one category. However, you can check in records to more than one folder, and those folders might be in separate categories with different disposition schedules. The record is processed by all disposition rules within a schedule; however, the rule with the longest retention period, if applicable, takes precedence. For event dispositions, the date furthest in the future takes precedence. Disposition processing precedence for records filed into multiple folders belonging to disparate categories is described in the *Records Manager DoD Edition System Administration Guide*. If you have questions regarding your filing policies, see your Records Manager DoD Edition administrator.

To check a record into more than one folder, complete the following steps:

1. Click **New Check In** on the toolbar or under the Content Management tray.

   The applicable checkin page is displayed.

2. Enable the **Is Record** check box to indicate the content is a record.

   The records-related fields are displayed

3. Enter optional information pertinent to the record. See Check In Page Metadata Fields (page 4-3) for information about metadata fields.

4. Click **Browse** next to the **Category or Folders** field.

   The Select Retention Categories or Folders Page (page 4-16) is displayed.

5. Choose the folders in which to file your record.

   The file paths are displayed in the text box. Click **OK**.

6. To preview the life cycle of the new record before actually checking it into the content server, click **Lifecycle Preview** at the bottom of the content check-in page. This opens a page showing the life cycle that the record will go through based on the current selections on the content check-in page.
7. After you enter all the appropriate metadata values, click **Check In**.

   Upon successful check-in, the check-in confirmation page is displayed.

For more detailed information on checking in content, see the online help or the *Content Server User Guide*.

CHECKING IN AN EXTERNAL RECORD

External records are anything defined by your organization as existing outside the Content Server. They can be a physical record of some sort, such as a paper or microform record, or they could be an electronic record stored on another server or by some other system. Filing external records within Content Server allows you to associate metadata with a record that can be searched, and establish and track a disposition schedule through the records management category into which the record is filed. You can also check in or link to an electronic rendition of an external record, so that the external record may be edited or updated more easily in the future.

Note: External retention is for records only. It does not pertain to non-record content. External records are disabled by default and are only available if a configuration variable has been set.

Note: To effectively manage physical records, we suggest you use Oracle Physical Records Manager which provides integration with Records Management.

To check in an external record, complete the following steps:

1. Access the content check-in form. If the content check-in form was not accessed from within Records Manager DoD Edition, enable the **Is Record** check box to display the records fields.
2. Enter optional information pertinent to the record. See Check In Page Metadata Fields (page 4-3) for information about metadata fields.
3. Enable the **External** check box. The External Location, External Container, and Media Type fields are enabled.

4. Specify the external location and container of the record. For example, the location could be a room or division number or address, and the container could be a file drawer or warehouse bin number.
5. Select the records media type. Media type options are determined by your system administrator.
6. Click **Browse** next to the **Category or Folders** field.

   The Select Retention Categories or Folders Page (page 4-16).
7. Choose the category or folders in which to file your record.

   The file paths are displayed in the text field on the page.
8. Fill in all required metadata fields, including the **Primary File** field. If there is no primary electronic file, you can type any value into the field, such as **None** or **External File Only**.
9. To preview the life cycle of the new record before actually checking it into the content server, click **Lifecycle Preview** at the bottom of the content check-in page. This opens a page showing the life cycle that the record will go through based on the current selections on the content check-in page.
10. After you enter all the appropriate metadata values, click **Check In**.

    Upon successful check-in, the check-in confirmation page is displayed.

Tech Tip: If you have an electronic version of an external file, you can specify it as the primary file during the check in process. This would provide an electronic rendition of the record for indexing of the text in the external file, making it available for searching, and would also make the electronic rendition available for editing of the record at a later date.

For more detailed information on checking in content, see the online help or the *Content Server User Guide*.

Checking In a Classified Record

Classified records are records that require protection against unauthorized disclosure (for example, because they contain information sensitive to the national security of the United States). Unclassified records are records that are not and have never been classified. Declassified records are records that were formerly classified, but whose classified status has been lifted.

Records classification is an optional security feature of Records Manager that is certified to comply with the Chapter 4 requirements of the DoD 5015.2 specification. Your system administrator can choose whether to enable this functionality and make it available to you.

Note: Classification is for records only. It does not pertain to non-record content. This functionality is enabled if the ClassificationEnhancement component has been installed and enabled.

Important: Executive Order 12958: Classified National Security Information describes in detail the system for classifying, safeguarding, and declassifying national security information. This guide assumes you are familiar with proper classification protocols.

To check in a record from the main menu, complete the following steps:

1. Click **New Check In** on the toolbar or under the Content Management tray.

   The content check-in form is displayed.

2. Enable the **Is Record** check box to indicate the content is a record.

   The records-related fields are displayed.

3. Enter optional information pertinent to the record. See Check In Page Metadata Fields (page 4-3) for information about metadata fields.

4. Click **Browse** next to the **Category or Folders** field.

   The Select Retention Categories or Folders Page (page 4-16) is displayed.

5. Choose the category or folders in which to file your record.

   The file paths are displayed in the text field on the page.

6. Specify the agency classifying the record. This is mandatory.

7. Specify the person classifying the record. This is mandatory unless the data is derived from a specific topic, in which case it is optional.

8. Specify what the classification is derived from. This is mandatory unless there is a specific classified by person identified.

9. Specify the topic derived from unless there is a specific person classifying the record.

10. Specify the classification at the time of record creation. For example, Top Secret, Secret, Confidential, and so forth.

11. Provide specification for classification. For example, military plans, foreign government information, cryptology, and so forth.

12. Specify the declassification exemption category. For example, reveal intelligence source, reveal military plans, and so forth.
13. Specify an event triggering the declassification of a record.
14. Specify a date triggering the declassification of a record.
15. Specify how a record can be downgraded. You can choose date, event, or date and event.
16. Specify an event triggering the downgrading of a record classification. This is mandatory if you specified how the record can be downgraded.
17. To preview the life cycle of the new record before actually checking it into the content server, click **Lifecycle Preview** at the bottom of the content check-in page. This will open a page showing the life cycle that the record will go through based on the current selections on the content check-in page.
18. After you enter all the appropriate metadata values, click **Check In**.

    Upon successful check-in, the check-in confirmation page is displayed.

For more detailed information on checking in content, refer to the online help or the *Content Server User Guide*.

CHECKING IN E-MAIL FOR RETENTION

You can check in e-mail messages as records or non-record content with the Oracle Outlook Integration for Microsoft Outlook.

Note: You can check in e-mail as either record or non-record content for retention purposes. To check in e-mail as a record, simply use the Is Record check box and follow the instructions for Checking In a Classified Record (page 4-23)

You must have the Oracle Outlook Integration component installed and configured on your client machine. For assistance with setting up your server and folders, see the online Help for Oracle Outlook Integration.

Outlook Integration Toolbar

The Outlook Integration toolbar enables you to configure virtual servers for checking in content with disparate metadata. You can also configure your check in folders for each server.

To display the Outlook toolbar in Microsoft Outlook, click **View—Toolbars—Oracle Outlook Integration**.

Note: You can also use Checking In Correspondence From a Non-Outlook E-Mail Client (page 4-27).

This section describes these topics:

- Checking In an Individual E-Mail as a Record or Retained Item (page 4-26)
- Checking In Correspondence From a Non-Outlook E-Mail Client (page 4-27)

Checking In an Individual E-Mail as a Record or Retained Item

Use this procedure to check in an individual e-mail as an individual record or retained item.

Important: Checking in an individual e-mail leaves the mail in your Inbox. You must manually delete the e-mail to remove it from your mailbox.

To check in an e-mail message as a record or content item, complete the following steps:

1. Open your Microsoft Outlook e-mail client.
2. In the **Server** list, select the server into which to check in e-mail content.
3. In your Inbox, select the e-mail to check in as a record. The e-mail message becomes highlighted.
4. In the Outlook Integration toolbar, click **Checkin Mail Item**. An Outlook message prompts you to allow access into your e-mail application.
5. Click **Yes**. The Content Check In Form is displayed.
6. Select the **Is Correspondence** check box. The e-mail fields are displayed, some of which are prepopulated for you:
   a. Addressee(s)
   b. Other Addressees(s)
   c. Email Subject
   d. Email To Lists
7. To preview the life cycle of the new record or retained item before actually checking it into the content server, click **Lifecycle Preview** at the bottom of the content check-in

page. This will open a page showing the life cycle that the record or retained item will go through based on the current selections on the content check-in page.

8. Click **Check In**.

Checking In Correspondence From a Non-Outlook E-Mail Client

Use this procedure to check in correspondence as a record or retained item if you do not use the Outlook Integration.

To check in e-mail from a client other than the Outlook Integration:

1. Open the e-mail client and save the e-mail messages in a text format or HTML.
2. Click **New Check In**.

   The Content Check In Form is displayed.
3. Check in the content, making sure you select **Is Correspondence** check boxes.
4. Be sure to complete the Correspondence fields, as they are not prepopulated for you if you are not using Outlook Integration.

Chapter

5

Searching for Record and Non-Record Retained Content

Overview

Oracle offers a variety of ways to search for records and non-record content. See the Content Server online help for information on using the Search tray, the Quick Search field, library query folders, case-sensitivity, using wild cards, and using search operators.

This chapter covers the following topics:

- Searching From Content Server's Main Menu (page 5-1)
- Viewing Search Results (page 5-15)

Searching From Content Server's Main Menu

This section describes these topics:

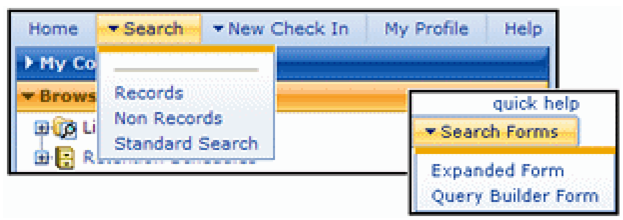
- Search Menu Options (page 5-2)
- Search Page Metadata Fields (page 5-3)
- Records Fields (page 5-5)
- Security Markings Fields (page 5-9)
- Freeze Fields (page 5-11)
- Vital Review Fields (page 5-12)

- ❖ Correspondence Fields (page 5-13)
- ❖ Date Fields (page 5-14)
- ❖ Other Fields (page 5-15)

Search Menu Options

When you install Records Manager DoD Edition, the Search menu options in Content Server are changed. You can use these menu options to quickly narrow down and optimize your searches.

Figure 5-1 Records Manager DoD Edition Search menu and Search Forms options



Types of Search Pages

In addition to the standard search page, you can use one of the following types of pages to search for record or non-record content items using Content Server's Search menu:

- ❖ Records
- ❖ Non Records
- ❖ Standard Search

Expanded Search Form

After you have selected the type of search form to use, you can choose to use the expanded version of that form or build a custom search query based on the selected form. By default, several sections of each search form are displayed using the collapsed format. When you select the expanded version of a search form, all of the sections on the form are displayed in the expanded format. For more detailed information and descripitons of each metadata field included on the search forms, see Search Page Metadata Fields (page 5-3).

Query Builder Form

The Query Builder form is available from the Search Forms drop-down menu on any of the search pages. It enables you to easily build and save complex queries by selecting options from a series of drop-down lists and operator fields. Once a query is built using the Query Builder from, you may edit the query directly, perform the search, or save the query for easy access from your saved queries or through a targeted quick search.

When you install Records Manager DoD Edition, the Query Builder form displays the Include Child Records Folders check box. If you select this option, the search function will return any matching results within child records folders. For comprehensive information about the Query Builder form, refer to the *Content Server User Guide*. All of the available drop-down lists and operator fields are described in more detail.

Search Page Metadata Fields

Although the Search tray and Quick Search field offer convenient search options, the search pages for the Records, Non Records, and Standard Search menu options provide the most comprehensive way to search for records and non-record content. The metadata fields included and described in the following table are representative of those that may be included in the search form that you select. The actual metadata fields that display are dependent on the components that are enabled and the profiles that are used. See your system administrator for more details.

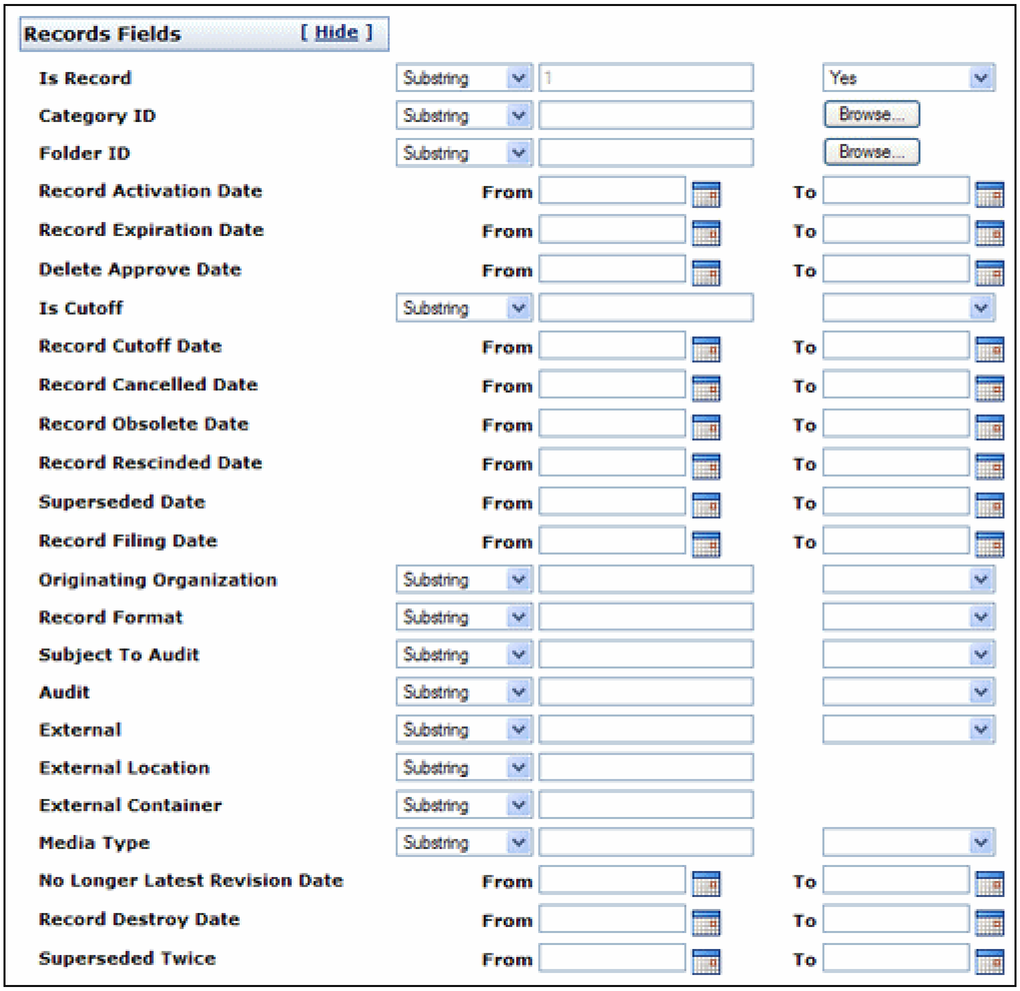
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Content ID</td><td>Searches for the unique identifier for a record or non-record content item.
❖ Duplicate names are not allowed.
❖ Maximum length is 30 characters.
❖ The following are not acceptable: spaces, tabs, linefeeds, carriage returns, and the symbols ; ^ ? : @ & + " # % < > * ~ |</td></tr>
<tr><td>Title</td><td>Searches the descriptive name entered when a record or non-record content item was filed.
❖ Maximum length is 80 characters.
❖ Double quotation marks " cannot be used when searching.</td></tr>
<tr><td>Type</td><td>Searches for records or non-record content items belonging to the specified category. It is best to select from a list of predefined values.</td></tr>
</table>

Field	Description
Security Group	Searches for record or non-record content items belonging to the specified security group.
Filer	Searches for record or non-record content items authored by the specified person. By default, the author is the last person who filed the record.
Release Date	Searches for record or non-record content items that were released and available for viewing during the specified dates.
Expiration Date	Searches for record or non-record content items that will expire during the specified date range. Expired content is no longer available for viewing.
Comments	Searches for the specified keywords in the additional notes entered when a record or non-record content item was checked in. A comments maximum length is 255 characters.
Email ID	Searches for the unique identifier for an email content item.
Profile Trigger	Searches for the specified trigger value that has been configured for a defined profile.
Life Cycle	Contains the categories that have been marked as non-record categories. Non-record content is assigned the disposition instructions associated with the retention category selected in the drop-down list.

Records Fields

The Records and Standard Search forms include the following records-related fields:

Figure 5-2 Records Fields section



Field	Description
Is Record	Select an option from the list: ❖ **null—**Searches all content, whether flagged as a record or not. ❖ **0—**Searches for content that has not been flagged as a record. ❖ **1—**Searches for content that has been flagged as a record.
Category ID	Searches for the category identifier. Click the Browse button to open the Select Retention Category screen. **Note: Is Record** must be set to **null** or **1** for the Category ID field to be active.
Folder ID	Searches for the records folder identifier. Click the Browse button to open the Select Records Folder screen. **Note: Is Record** must be set to **null** or **1** for the Folder ID field to be active.
Record Activation Date	Searches for records that are activated during the specified date range.
Record Expiration Date	Searches for records that expire during the specified date range.
Delete Approve Date	Searches for records that have been approved for deletion during the specified date range.
Is Cutoff	Select an option from the available options list: ❖ **Null (Default)—**Searches for all records, whether cut off or not. ❖ **0—**Searches for records that have not been cut off. ❖ **1—**Searches for records that have been cut off and begun the disposition process.
Record Cutoff Date	Searches for records that have been cut off during the specified date range.

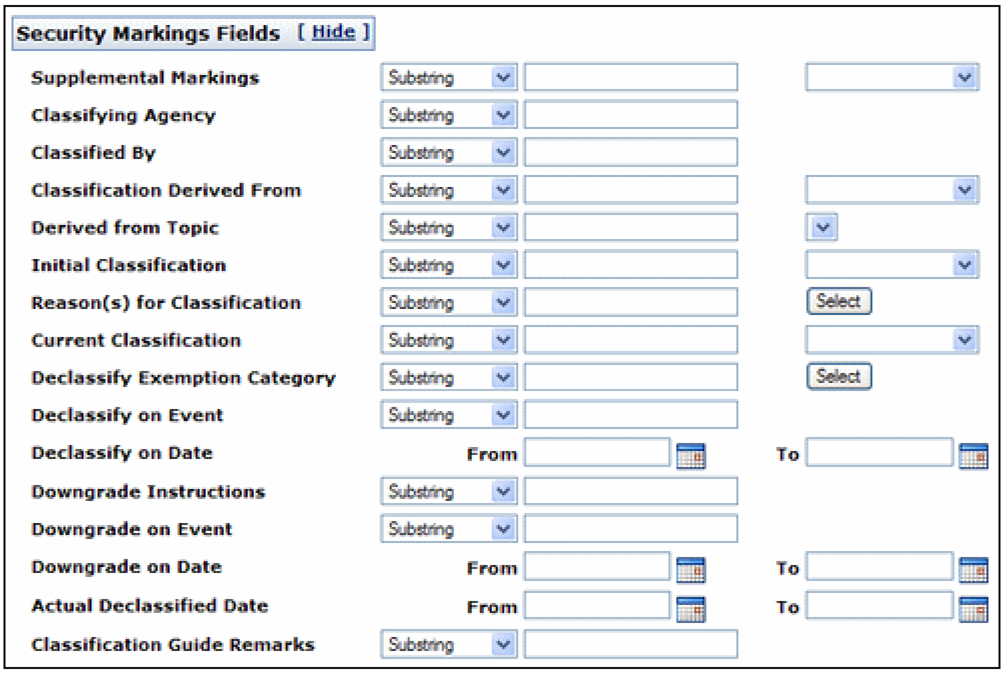
Field	Description
Record Cancelled Date	Searches for records that have been cancelled during the specified date range.
Record Obsolete Date	Searches for records that
Record Rescinded Date	Searches for records that have been or will be rescinded by the specified date.
Superseded Date	Searches for records that have been or will be superseded by the specified date.
Record Filing Date	Searches for records that have been filed during the specified date range.
Originating Organization	Searches for records that originated at the specified organization.
Record Format	Searches for records of the specified format. Formats are defined by the system administrator and available for selection from a choice list.
Subject to Audit	Select an option from the available options list: ❖ **Null (Default)—**Searches for all records, whether subject to an audit or not. ❖ **0—**Searches for records not subject to an audit. This means the check box “Subject to Audit” was not checked on the Check in page. ❖ **1—**Searches for records are subject to an audit. This means the check box “Subject to Audit” was checked on the Check in page.
Audit	Searches for records audited during the specified audit. Audit options are set up by an administrator and selected using the choice list.

Field	Description
External	Select an option from the available list: ❖ **Null (Default)—**Searches for all records, both internal and external. ❖ **0—**Searches for records whose source file is internal to Records Manager DoD Edition. ❖ **1—**Searches for records whose source file is external to Records Manager DoD Edition.
Tech Tip: An external record can be in a variety of formats, both physical or electronic. If the source file is not specifically stored in **Records Manager DoD Edition**, then it is considered external. However, Content Server can be used to track and search metadata associated with the external file, including disposition schedules, and can even manage an electronic rendition of an external file. An electronic rendition can either be checked in as a primary file of an external document, or be filed as a separate file, then linked to the external file metadata.	
External Location	Searches the External Location metadata for specified keywords. ❖ Maximum length: 100 characters.
External Container	Searches the External Container metadata for specified keywords. ❖ Maximum length: 30 characters.
Media Type	Searches for records of the specified media type.
No Longer Latest Revision Date	Associated with a trigger that is activated for monitored content when a new revision of the content is checked in.
Record Destroy Date	The date on which the record was destroyed. This field is pertinent to a search for metadata for destroyed records.
Superseded Twice	Associated with a trigger that is activated when content is superseded by other content, which is subsequently superseded again.

Security Markings Fields

The Records and Standard Search forms include the following security markings-related fields:

Figure 5-3 Security Markings Fields section



Field	Description
Supplemental Markings	Searches for records based on the specified supplemental markings. **Note:** The search only returns records with the supplemental markings to which you have been assigned.
Classifying Agency	Agency classifying the record
Classified By	Person classifying the record

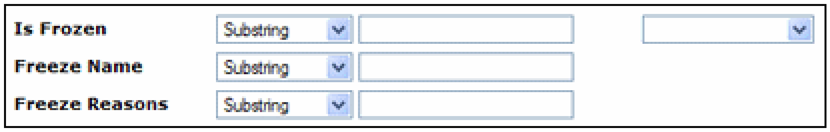
Field	Description
Classification Derived from	Classification Guides (page 4-15) from which the classification of the records are derived. This is mandatory if the *Classified by* field is blank. If this field is used, suggested values for the following fields are displayed automatically to facilitate uniformity, but you can change them: ❖ Initial classification ❖ Reason(s) for classification ❖ Declassify exemption category ❖ Declassify on event ❖ Declassify on date
Derived from topic	Topic associated with Classification Guides (page 4-15) used to derive classification. This is an option list whose values are dependent on the *Classification Derived from* field. The information icon to the right of the list presents the description of the selected topic.
Initial Classification	Classification at time of record creation. The available options include: ❖ Top Secret ❖ Secret ❖ Confidential ❖ No Markings ❖ Any custom classification as defined by your organization
Reason(s) for Classification	Specification for classification

Field	Description
Current Classification	Current classification of record subsequent to any upgrades or downgrades in classification. The available options include: ❖ Top Secret ❖ Secret ❖ Confidential ❖ No Markings ❖ Any custom classification as defined by your organization
Declassify Exemption Category	A category that exempts the record from being declassified after the standard declassification period (as defined by the records administrator; typically 10 years)—for example, reveal an intelligence source, compromises US military plans, etc.
Declassify on Event	An event triggering the declassification of a record.
Declassify on Date	A date triggering the declassification of a record.
Downgrade Instructions	Instructions on how a record can be downgraded.
Downgrade on Event	An event triggering the downgrading of a record classification
Downgrade on Date	A date triggering the downgrading of a record classification
Actual Declassified Date	The date on which the record was declassified. This may vary from the planned date of declassification.
Classification Guide Remarks	Text describing the classification guide usage.

Freeze Fields

The Records, Non Records, and Standard Search forms include the following freeze-related fields:

Figure 5-4 Freeze fields section

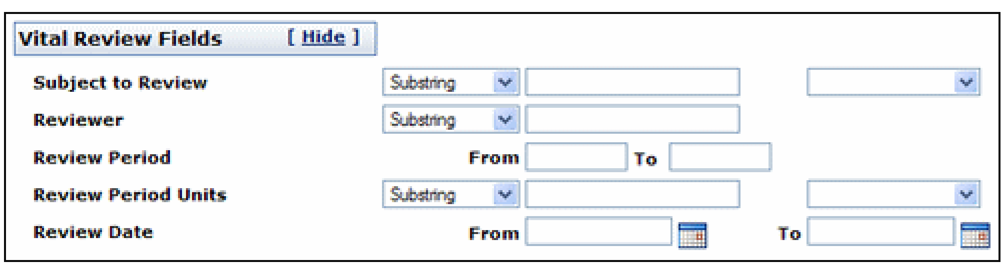


Field	Description
Is Frozen	Select an option from the available options list: ❖ **Null (Default)**—Searches for all records, whether frozen or not. ❖ **0**—Searches for records that have not been frozen. ❖ **1**—Searches for records that have been frozen.
Freeze Name	Searches by a freeze name.
Freeze Reasons	Searches the Freeze Reason metadata for keywords entered here. This can apply to record and non-record content

Vital Review Fields

The Records, Non Records, and Standard Search forms include the following vital review-related fields:

Figure 5-5 Vital Review Fields section

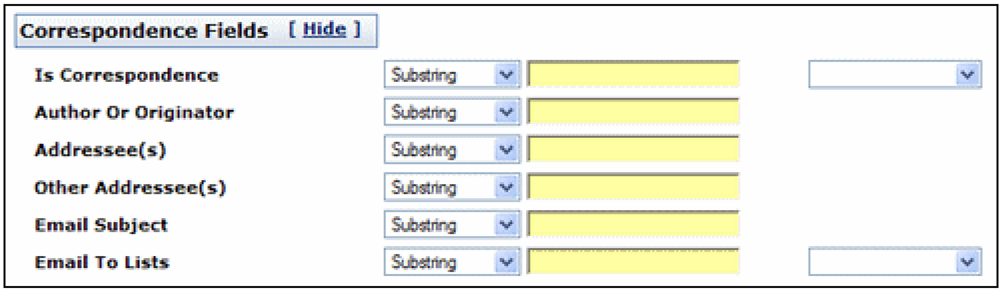


Field	Description
Subject to Review	Select an option from the available options list: ❖ **Null (Default)—**Searches for all record or non-record content items, whether flagged as subject for review or not. ❖ **0—**Searches for record or non-record content items that have not been flagged as subject for review. ❖ **1—**Searches for record or non-record content items that have been flagged as subject to review.
Reviewer	Searches for record or non-record content items flagged as subject to review which are reviewed by the specified person.
Review Period	Searches for record or non-record content items flagged as subject to review which are reviewed during the specified period.
Review Period Units	Searches for record or non-record content items flagged as subject to review at the specified period intervals.
Review Date	Searches for records that have been reviewed during the specified date range.

Correspondence Fields

The Records, Non Records, and Standard Search forms include the following correspondence-related fields:

Figure 5-6 Correspondence Fields section

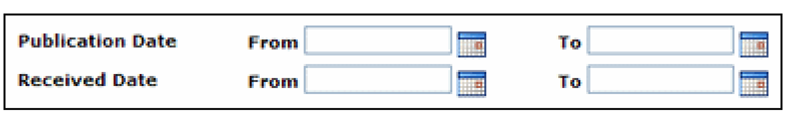


Field	Description
Is Correspondence	Searches for record or non-record e-mail content checked in via Outlook Integration.
Author or Originator	Searches for e-mail messages sent by specified person.
Addressee(s)	Searches for e-mail messages sent to the specified person.
Other Addressee(s)	Searches for e-mail messages copied to the specified person.
Email Subject	Searches for the specified keywords in the subject lines of e-mail messages.
Email To Lists	Searches for e-mail messages sent to a specified alias list.

Date Fields

The Records, Non Records, and Standard Search forms include the following related-related fields:

Figure 5-7 Date fields section



Field	Description
Publication Date	Searches for record or non-record content items that were published on the specified date.
Received Date	Searches for record or non-record content items that were received on the specified date.

Other Fields

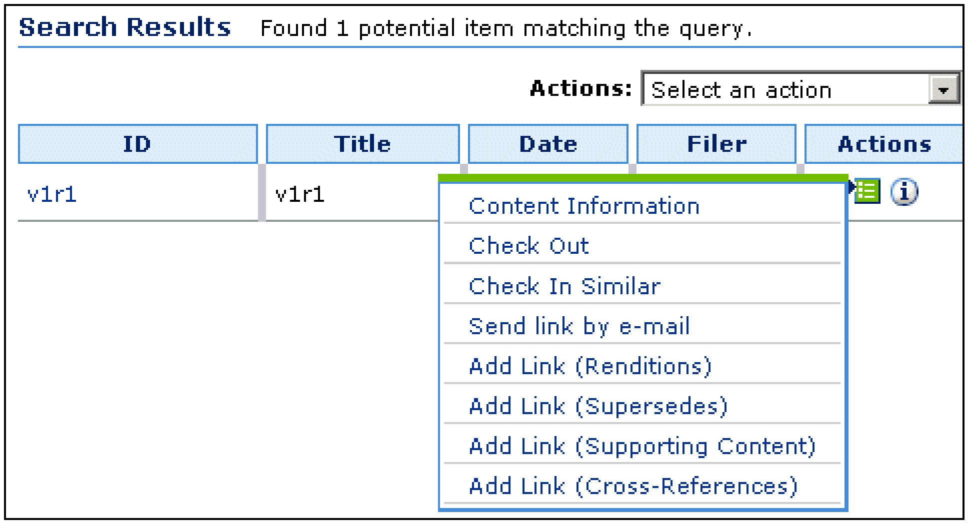
Enable the *Include Child Records Folders* check box to return any search results within child records folders. **Is Record** must be set to null or 1 for this field to be active.

Various folder fields are visible from the Advanced Search page. In addition, custom fields added by your system administrator may appear. These fields vary by organization. If your organization uses custom fields, and if you enabled the *Show custom fields* check box, then custom fields for your organization are displayed.

Viewing Search Results

After selecting your search criteria on the Advanced Search page, or after using any of the other Content Server search options, the results of your search are displayed on a search results page. What information is displayed and how it is formatted can be changed using the Actions choice list on the search results page, or by setting a default search result template option on the User Profile page. For more information about customizing your search results options, see Customizing the My Headline View Search Template (page 6-21), or review the Content Server online help.

Figure 5-8 Search results page showing the Actions options



Chapter

6

CUSTOMIZING YOUR USER INTERFACE

OVERVIEW

Content Server gives you several options for customizing how Content Server displays and navigates to information. Records Manager DoD Edition gives you some additional options. For example, the content check-in page and content information page list all metadata that could be associated with records. This can be a large amount of information that might or might not be pertinent to the needs of you or your organization.

With Records Manager DoD Edition installed, you can customize which metadata fields are displayed on the content check-in and content information pages. Hiding fields that are not used by your organization or useful to your needs can help you more easily access the information you want. You can also create custom check-in templates to define check-in forms other than the default content check-in page. This chapter discusses the additional personalization options installed with Records Manager DoD Edition.

Note: For a full understanding of the standard Content Server personalization options, see the Content Server online help system or user guide.

This section covers the following topics:

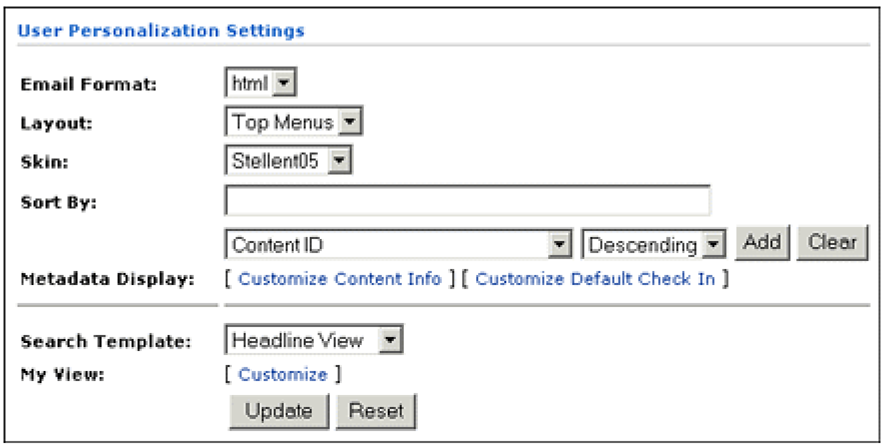
- User Personalization Settings (page 6-2)
- Customizing Metadata Display (page 6-3)
- Customizing the Content Information Page (page 6-4)
- Customizing the Check-In Page (page 6-8)

- Creating Custom Check-In Templates (page 6-16)
- Prepopulating “Sort By” Options (page 6-19)
- Customizing the My Headline View Search Template (page 6-21)

USER PERSONALIZATION SETTINGS

You can use the User Personalization Settings area of the User Profile page to configure your personal display preferences. To access the User Profile page, click **My Oracle—My Profile**. The User Personalization Settings area is shown in the figure below:

Figure 6-1 User Personalization Settings area on user profile page



With Records Manager DoD Edition installed, the User Personalization Settings added by the RMA Personalization component of Records Manager DoD Edition are listed in the following table:

Feature	Description
Sort By	Enables you to specify additional hierarchical sorting parameters on all search results. For further information see Prepopulating “Sort By” Options (page 6-19).

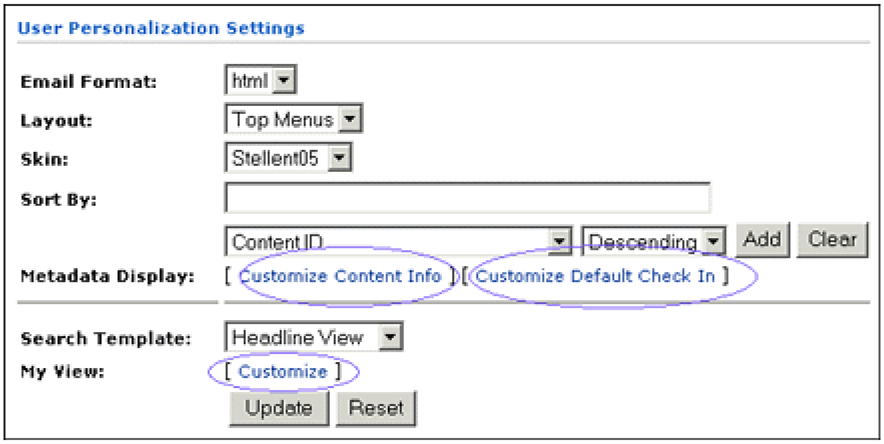
Feature	Description
Metadata Display	There are two links available: ❖ **Customize Content Info:** Displays the Content Info Customizations Page (page 6-4). ❖ **Customize Default Check In:** Displays the Default Check In Template Page (page 6-9). For more details, see Customizing Metadata Display (page 6-3).
My Headline View Fields	Enables you to specify additional metadata fields to display in the My Headline View search result view. For more information, see Customizing the My Headline View Search Template (page 6-21).

CUSTOMIZING METADATA DISPLAY

You can customize the order and display of metadata fields in your Content Information pages, and in your default Check In page. In the Metadata Display area, there are two links you can click to access the applicable customization pages:

- **Customize Content Info link:** Click this link to customize the content information (page 6-4).
- **Customize Check-In link:** Click this link to customize the content check-in page (page 6-8).

Figure 6-2 Metadata Display options in User Personalization Settings area



CUSTOMIZING THE CONTENT INFORMATION PAGE

When you click this link in the Metadata Display area of the User Personalization Settings area of your User Profile page, the Content Info Customizations page is displayed. This section contains the following topics:

Interface Reference

❖ Content Info Customizations Page (page 6-4)

Tasks

❖ Customizing Your Content Information Page (page 6-6)

Example

❖ Example: Custom Content Information Page (page 6-7)

Content Info Customizations Page

The Content Info Customizations page lists the fields that are normally displayed on the Content Information page of a record or content item. Selecting a metadata field on the Customize Content Info page allows you to alternately hide or show metadata on the Content Information page, or change the order that the fields are displayed.

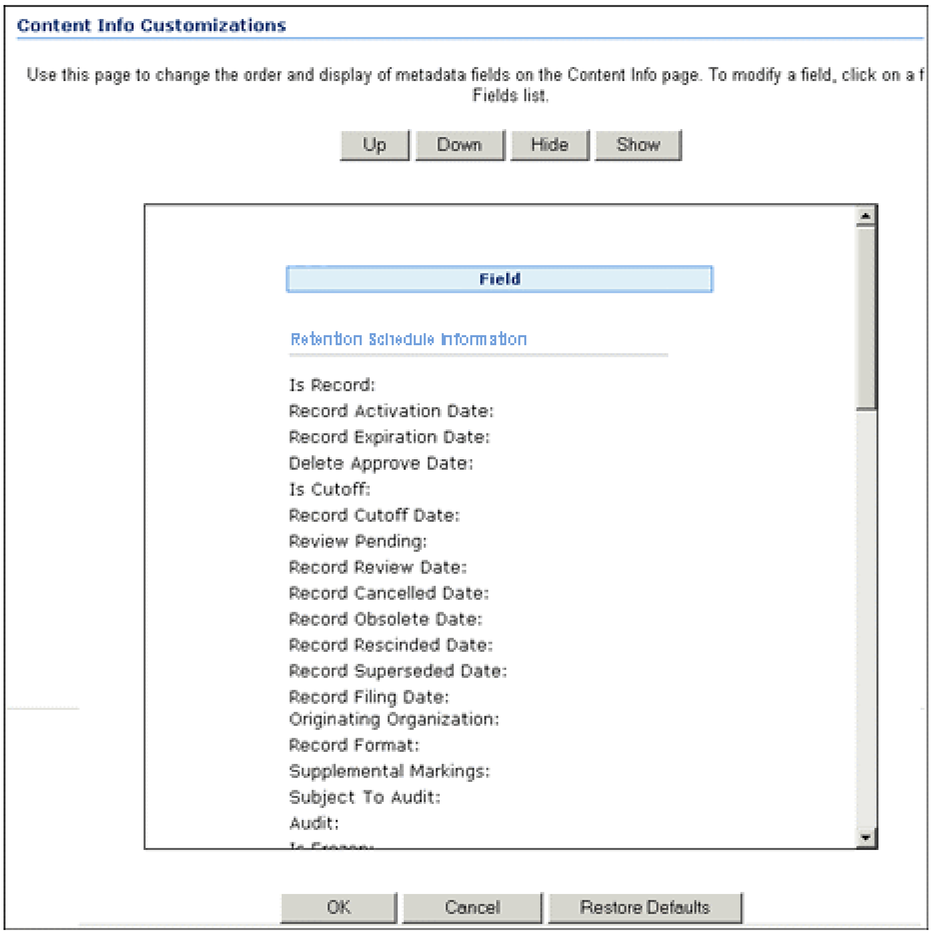
To access the Content Info Customizations page, complete the following steps:

1. Click **My Oracle—My Profile**.

   Your User Profile page is displayed.

2. In the User Personalization Settings are, look for the Metadata Display label and click **[Customize Content Info]**.

Figure 6-3 Content Info Customizations page



Appearance of Selected vs. Hidden Fields

Notice in the figure above, the field "Record Activation Date" is selected. The text appears in bold font, and there is a lightly shaded background to indicate a field is selected. You can only select one field at a time. Simply click on a field in the list to select it.

Directly below the Record Activation Date field, there is a hidden field labelled "Record Expiration Date." Notice that the background is a darker shade, and the font appears in a regular rather than bold typeface.

Note: You can restore the default order and display of metadata fields at any time by clicking **Restore Defaults** on the Content Info Customizations page.

To hide, show, or reorder a selected field, complete the following steps:

- ❖ To hide the field, click **Hide** or press **Alt+H**. The hidden field highlight darkens to grey.
- ❖ To show a hidden field, click **Show** or press **Alt+O**. The field highlight lightens to show that it is still selected but will not be hidden.
- ❖ To move a field up on the Content Information page, click **Up** or **Alt+I**. The selected field moves up in the listing with each click.
- ❖ To move a field down on the Content Information page, click **Down** or press **Alt+K**. The selected field moves down in the listing with each click.

Changes are reflected globally on all content information pages, and like all items tracked by your user profile, are unique to you and are remembered until you change them.

Note: If you set a value for a metadata field on the Check In Customizations page and then hide the field, the value you specified is used automatically during check in. The value is then displayed on the Content Information page unless hidden by you, or it can be listed in the My Headline View search results.

Customizing Your Content Information Page

Use this procedure to customize the display of metadata fields on your Content Information page.

To customize your Content Information page, complete the following steps:

1. Click **My Oracle—My Profile**.

   Your User Profile page is displayed.

2. In the User Personalization Settings are, look for the Metadata Display label and click **Customize Content Info**.

   The Content Info Customizations Page (page 6-4) page is displayed.

3. Make your selections to hide, show, or reorder fields as you desire.

4. Click **OK**.

Example: Custom Content Information Page

This example provides a simple procedure for customizing your Content Information page. This example hides some date fields, and moves the Is Frozen and Freeze Reason fields up near the top of the page.

To try this example customization, complete the following steps:

1. Click **My Oracle—My Profile**.

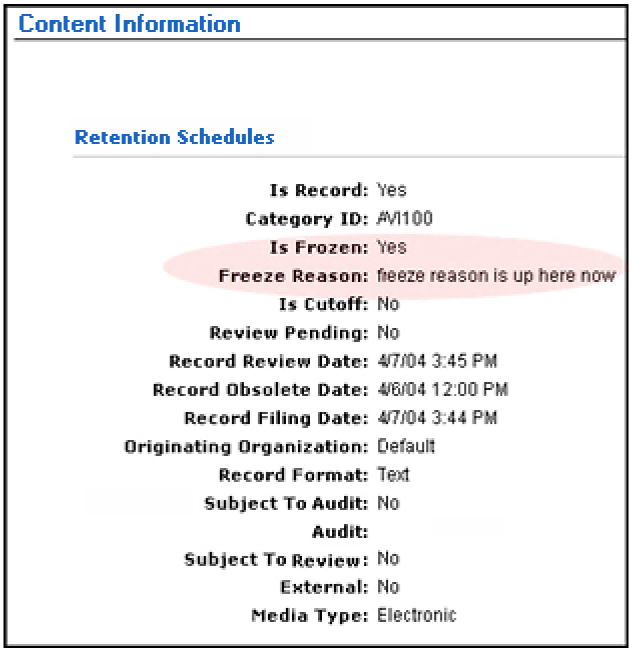
   Your User Profile page is displayed.

2. In the User Personalization Settings are, look for the Metadata Display label and click **Customize Content Info**.

   The Content Info Customizations Page (page 6-4) page is displayed.

3. In the Field list, click to select the “Record Activation Date:” field. The text appears bold, and the background area appears in a light tan shade.
4. Click **Hide**. The field appears in a darker shade of gray.
5. In the Field list, click to select the “Record Expiration Date:” field.
6. Click **Hide**.
7. In the Field list, click to select the “Delete Approve Date:” field.
8. Click **Hide**.
9. In the Field list, select the “Is Frozen:” field. Click **Up** repeatedly until “Is Frozen” is under the “Is Record” field.
10. In the Field list, select the “Freeze Reason:” field. Click **Up** repeatedly until “Freeze Reason” is under the “Is Frozen” field.
11. Click **OK**. To view the new layout of the Content Information page, click Search, and then the Info icon for a record. The arrangement and display reflect your changes. Notice the Freeze fields are near the top of the Content Information page, and the date fields that were hidden do not appear.

Figure 6-4 Example of customized content information page



CUSTOMIZING THE CHECK-IN PAGE

When you click this link in the Metadata Display area of the User Personalization Settings area of your User Profile page, the Check In Customizations page is displayed. When you access the Check In Customizations page from your User Profile link, it customizes your default check-in form. Unless you explicitly select a custom check-in template from your My Check In Templates links, the default check-in form is displayed when you click **New Check In** from the Main menu, or the **Create Record** link from with your Records Manager DoD Edition retention schedule. For further information about custom check in templates other than the default check-in, see Creating Custom Check-In Templates (page 6-16).

This section covers the following topics:

Interface Reference

❖ Default Check In Template Page (page 6-9)

❖ Quick Picks Customization Page (page 6-11)

Tasks

- ❖ Customizing Your Default Check-In Form (page 6-12)
- ❖ Setting a Check-In Form Field to Information-Only (page 6-13)
- ❖ Customizing an Options List for Your Check-In Forms (page 6-14)
- ❖ Restoring Defaults to Your Default Check-In Form (page 6-14)

Example

- ❖ Example: Customizing Your Default Check-In Form (page 6-15)

See Also

– Creating Custom Check-In Templates *(page 6-16)*

Default Check In Template Page

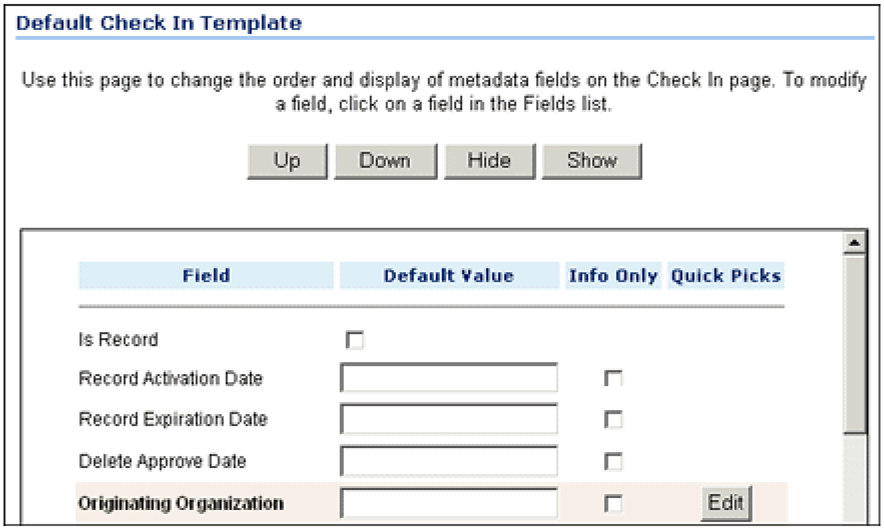
The Default Check In Template page lists the fields that are normally displayed on the Content Check In form when you check in a record or content item. You can access your default Check In page by clicking **Customize Default Check In** on your User Profile page.

You can also create your own custom check in templates. For more information, see Creating Custom Check-In Templates (page 6-16).

Selecting a metadata field on the Customize Check In page allows you to alternately hide or show metadata options on the Content Check In form, or change the order that the fields are displayed.

Note: You can restore the default order and display of metadata fields at any time by clicking **Restore Defaults** on the Check In Customizations page.

Figure 6-5 Check In Customizations page for your default content check-in form



Click on a field to select it. The selected field becomes highlighted. To use this customization page, complete the following steps:

- ❖ To hide the field click **Hide** or press **Alt+H**. The highlight darkens.
- ❖ To show a hidden field again, click **Show** or press **Alt+O**. The field highlight lightens to show that it is still selected, but will not be hidden.
- ❖ To move a field up, click **Up** or press **Alt+I**. Repeat for each line to move the field up.
- ❖ To move a field down, click **Down** or press **Alt+K**.
- ❖ To enter a default value, type the value in the **Default Value** check box.
- ❖ To make a field information only, select the **Info Only** check box for the field.
- ❖ To confirm changes, click **OK** on the Check In Customizations page. The page is closed.

Changes are reflected on your default Content Check In form, regardless of whether you access it via Content Server or Records Manager DoD Edition. See Checking In From Content Server's Main Menu (page 4-2) and Checking In From Within Retention Schedules (page 4-18) for information on the content check-in forms. Like all items tracked by your user profile, changes made using the Check In Customizations page are unique to you and are remembered until you change them.

Quick Picks Customization Page

Use the Quick Picks pages to hide or show multiple values for option lists on your default or extra custom Check In forms. Most of the fields with options lists have the Quick Picks pages available. You can customize the options list view of any metadata field that has an Edit button in the Quick Pics column of the Default Check In Template Page (page 6-9). If there are a large number of values, or ones that are not applicable to your responsibilities, you can hide the extraneous options from view, which makes selecting a value from its options list a faster process.

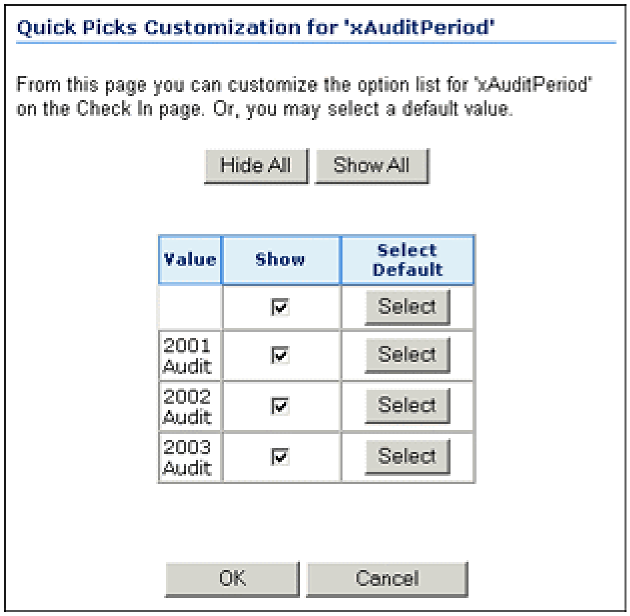
Some of the Records Manager DoD Edition fields that have options lists you can customize include the following:

- Originating Organization
- Record Format
- Audit
- Media Type

Some of the standard Content Server fields that have options lists you can customize include the following:

- Type
- Filer (also known as "Author")
- Security Group

Figure 6-6 Example of Quick Pics Customization page



Here are the basic instructions for using the Quick Picks pages reiterated from the online instructions:

- To hide all values in an option list, click **Hide All**.
- To display all values in an option list, click **Show All**.
- To show an individual value, select its **Show** check box. To hide an individual value, clear its **Show** check box.
- When you are done, click **OK**.

Customizing Your Default Check-In Form

Use this procedure to customize your default check in form. The default Content Check In Form is the page that is displayed whenever you click **New Check In** from the Main Menu, or **Create Record** from within your Records Manager DoD Edition retention schedule. To view a specific example rather than a general navigational procedure, see Example: Customizing Your Default Check-In Form (page 6-15).

To customize your default content check-in form, complete the following steps:

1. Click **My Oracle—My Profile—Metadata Display: [Customize Check In]**.

   The Default Check In Template Page (page 6-9) is displayed.

2. Make your desired changes, such as reordering a field, setting a default, making fields read-only, or paring down available values within an options list.

3. Click **OK**. The settings are saved. The Check In Customization page is closed, and the User Profile page is displayed again.

4. Click **Update**. The User Profile page closes, and the main splash screen is displayed.

See Also

– *Setting a Check-In Form Field to Information-Only (page 6-13)*

– *Customizing an Options List for Your Check-In Forms (page 6-14)*

Setting a Check-In Form Field to Information-Only

Use this procedure to set a check in form field to read-only. You cannot edit a read-only field on the content check-in page, but you can enable the field as an editable field at any time.

Important: Some fields cannot be made Information Only until you set a default for the field. These fields are generally the required fields that are indicated in red and an asterisk, such as Content ID, Type, Title, Filer, and Primary File. After you enter a default, you can then set the field to Info Only.

To set a check-in field to information only, complete the following steps:

1. Navigate to the check in form to work with:

   ❖ If it is your default check-in form, click **My Oracle—My Profile—Metadata Display: [Customize Check In]**.

   ❖ If it is a custom check-in form, click **My Oracle—My Check In Templates—Edit Check In Templates**. Select the **[Edit]** action for the template to work with. The Check In Template for 'template name' is displayed.

2. Select the **Info Only** check box for the field or fields to make read-only.

3. Click **OK**.

Customizing an Options List for Your Check-In Forms

Use this procedure to customize the display of values for an options list for your default or a custom Check In Forms. Creating custom check in templates are discussed elsewhere in this chapter. For further information, see Adding a Custom Check-In Template (page 6-16).

The customization you can do for an options list includes showing all list options, hiding all list options, and showing or hiding selected list options. Most likely, you might use this feature to pare down large options lists to make the selection process faster during check in. For example, there might be a large number of users, and you only want a small subset to show in the Filer options list, so you hide those for which you do not want to view.

To customize an options list for a check-in form, complete the following steps:

1. Navigate to the check in form to work with:
   - ❖ If it is your default check in form, click **My Oracle—My Profile—Metadata Display: [Customize Check In]**. The Check In Customizations page is displayed.
   - ❖ If it is a custom check in form, click **My Oracle—My Check In Templates—Edit Check In Templates**. Select the **[Edit]** action for the template to work with. The Check In Template for 'template name' is displayed.
2. On the Check In Template/Customizations page, click **Edit** next to the field choice list to modify. The Quick Picks Customization page for the field is displayed.
3. Clear the check boxes of the choice list option you would like to hide. Select the check boxes of the values to show. You can use the Hide All or Show All buttons as well.
4. Click **OK**. The Quick Picks Customization page closes.
5. Click **OK** on the Check In Template/Customizations page. The Check In Template/ Customizations page closes.

Restoring Defaults to Your Default Check-In Form

Use this procedure to restore the default values to your default check in form. By default, all form fields are displayed along with any standard default value if applicable.

To restore defaults to your default check-in form, complete the following steps:

1. Click **My Oracle—My Profile—Metadata Display: [Customize Check In]**.

   The Default Check In Template Page (page 6-9) is displayed.

2. Click **Restore Defaults**. A message is displayed prompting you to confirm deleting your customizations and restoring the original defaults.
3. Click **OK**. The message box closes.
4. In the Check In Customizations Page, click **OK**. The User Profile page is displayed again. To view the restored default check in form, click **New Check In** from the Content Server Main Menu.

Example: Customizing Your Default Check-In Form

This example customizes your default check in form. The default check in form is the form that opens whenever you click **New Check In** from the Main Menu, or **Create Record** from within your Records Manager DoD Edition retention schedule.

In this scenario, the Browse Category or Records Folder field is moved toward the top of the page for more convenient access.

To try this example, complete the following steps:

1. Click **My Oracle—My Profile—Metadata Display: [Customize Check In]**.

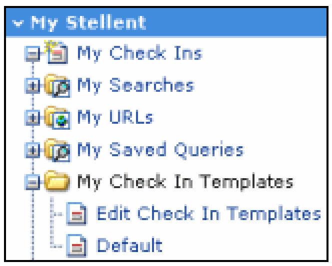
   The Default Check In Template Page (page 6-9) is displayed.

2. Scroll down and click to select the **Category or Folders** field. A colored border displays around the field.
3. Click **Up** repeatedly to move the field directly under the **Is Record** check box. Now the field has been relocated.
4. Click **OK**. The settings are saved. The Check In Customization page is closed, and the User Profile page is displayed again.
5. Click **Update**. The User Profile page closes, and the main splash screen is displayed.
6. To view your customized default check in form, click **New Check In** from the Main Menu. The (default) Content Check In Form is displayed. Click the **Is record** check box to view the Records Manager DoD Edition fields. Notice the Browse for Category or Folders fields is more conveniently located near the top of the page.

CREATING CUSTOM CHECK-IN TEMPLATES

You can create multiple custom check in templates to suit your own workflow needs. Not only can you customize your default check-in page as described in the topic Default Check In Template Page (page 6-9), you can also add, edit, and delete multiple check-in templates. These custom templates are added to the My Check In Templates area of your My Oracle tray. These custom check-in templates are only available for your own use. The figure below shows the My Check In Templates folder located in the My Oracle tray:

Figure 6-7 My Check In Templates option in My Oracle tray



Some fields cannot be hidden in Records Manager DoD Edition, as they are required to be visible by the DoD specification.

This section includes the following topics:

Tasks

- Adding a Custom Check-In Template (page 6-16)
- Editing a Custom Check-In Template (page 6-17)
- Selecting a Custom Template to Check In a Record (page 6-17)
- Deleting a Custom Check-In Template (page 6-18)
- Example: Creating a Custom Check-In Template (page 6-18)

Adding a Custom Check-In Template

Use this procedure to add a custom check in template. You might want to have the convenience of custom check in forms for different purposes. Once you add a new template, you must edit the settings. See Editing a Custom Check-In Template (page 6-17).

To add a new check in template, complete the following steps:

1. Click **My Oracle—My Check In Templates—Edit Check In Templates**. The Check In Templates for your user profile page is displayed.
2. Click **Add New Check In Template**. A prompt requests you to enter a title for the template.
3. Enter a title for the template and click **OK**. The new check in template is added to the list of templates.
4. In the Actions list for the new template, click **[Edit]**. The Check In Template for “Template Title” page is displayed for you to configure your preferences.
5. Make your selections and click **OK**.

Editing a Custom Check-In Template

Use this procedure to edit a newly created or an existing Check In template.

To edit a custom check in template, complete the following steps:

1. Click **My Oracle—My Check In Templates—Edit Check In Templates**.

   The Check In Templates for *your user profile* page is displayed.
2. In the Actions list for the template to edit, click **[Edit]**. The Check In Template for “Template Title” page is displayed for you to configure your preferences. Make your selections and click **OK**.

Selecting a Custom Template to Check In a Record

Use this procedure to check in a record with a custom template you created. You must first create the custom template. A custom template is not the default check in form that is presented whenever you click New Check In from the Content Server Main Menu, or when you click Create Record from with the Records Manager DoD Edition retention schedule. You must select the custom check in template each time you want to use it.

Prerequisite:

❖ Adding a Custom Check-In Template (page 6-16)

To use a custom check-in template to check in a record, complete the following steps:

1. Click **My Oracle—My Check In Templates**. The list of customized non-default templates is displayed under the Edit Check In Templates link.
2. Click the template to use. The Content Check In Form is displayed.
3. Check in the record with your custom template. For more information on checking in records, see Chapter 4 (*Creating Records and Non-Record Content for Retention)*.

Deleting a Custom Check-In Template

To delete a custom check-in template, complete the following steps:

1. Click **My Oracle—My Check In Templates—Edit Check In Templates**.

   The Check In Templates for your user profile page is displayed.
2. In the Actions list for the template to delete, click **[Delete]**. You are prompted to confirm the delete.
3. Click **OK**. The custom check-in template is removed from your list of templates.

Example: Creating a Custom Check-In Template

This example creates and configures a new custom check in template. In this scenario, the Browse Category or Records Folder field is moved toward the top of the page for more convenient access, and some of the date fields are made information-only and moved down the page.

To create an example check in template, complete the following steps:

1. Click **My Oracle—My Check In Templates—Edit Check In Templates**. The Check In Templates for *your user profile* page is displayed.
2. Click **Add New Check In Template**. A prompt requests you to enter a title for the template.
3. Enter the title **`My Own Check In`** and click **OK**. The new check in template is added to the list of templates.
4. In the Actions list for the new template, click **[Edit]**. The Check In Template for “My Own Check In” page is displayed for you to configure your preferences.
5. Scroll down and click to select the **Category or Folders** field. The field is highlighted.

6. Click **Up** repeatedly to move the field directly under the **Is Record** check box. Now the field has been relocated.
7. Select the **Record Activation Date**, **Record Expiration Date**, and **Delete Approve Date** fields one at a time and click **Down** until they all appear under the field "Media Type".
8. Select the **Info Only** check box for the **Record Activation Date**, **Record Expiration Date**, and **Delete Approve Date** fields one at a time.
9. Uncheck the Info Only check box for Media Type. In the Default Value text box for the **Media Type** field, type **`Paper`** as the default value.
10. Click **OK**. The settings are saved.
11. To view your newly created check in template, click **My Oracle—My Check In Templates—My Own Check In**. The Content Check In Form is displayed. Click the **Is record** check box to view the Records Manager DoD Edition fields. Notice the Browse for Category or Folders fields is more conveniently located near the top of the page, and the date fields are Information Only and cannot be edited.

PREPOPULATING "SORT BY" OPTIONS

You can specify your default general sorting results from the user profile page. The settings you select in the User Personalization area are populated in the Results Options area of the Search page by default. You can opt to specify your frequent search sort by defaults to use the majority of the time, override the defaults occasionally in the Search page itself, or leave your sort by preference defaults blank and specify them for every search.

Using the choice lists below the Sort By field, you can specify a series of any metadata parameters to be used when sorting search results. After selecting each parameter, you must click **Add** to add it to the Sort By field, and enable it by clicking **Update**.

See Also

– *Example: Prepopulating Search Results Options (page 6-20)*

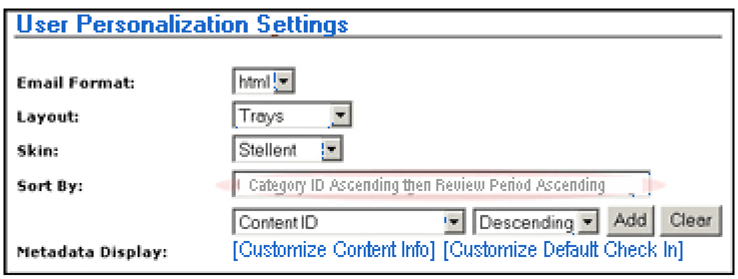
Example: Prepopulating Search Results Options

This example sets sort by search results Ascending by Category Type, then Ascending by the Review Period unit. This example assumes you have records filed into your instance of Records Manager DoD Edition.

To try this example, complete the following steps:

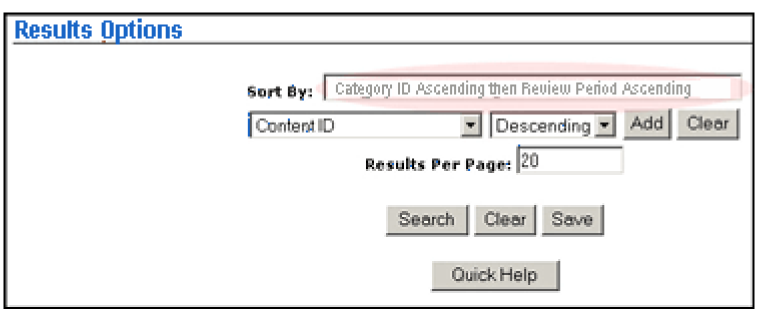
1. Click **My Oracle—My Profile**. The User Profile page is displayed.
2. Under the **Sort By** field on the **User Profile** page, select **Category ID** then **Ascending** from the choice lists.
3. Click **Add**. The Sort By field is populated with the words *Category ID Ascending*.
4. Select **Subject to Review** then **Ascending** from the choice lists.
5. Click **Add**. The Sort By field is amended with the words, *then Review Period Ascending*.

Figure 6-8 Prepopulating search results options



6. Click **Update**.
7. Click **Search**. The Search page is displayed. Notice that the results options are prepopulated with the User Personalization Sort By Settings:

Figure 6-9 Sort order in search results options

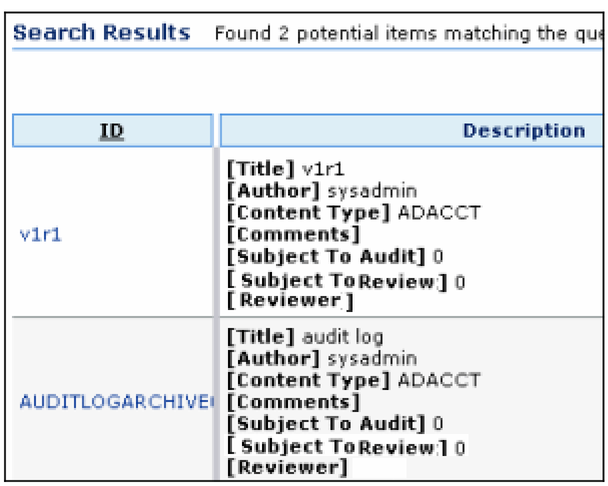


8. Select the following options for the Search:
   - ❖ Is Record=1
   - ❖ Review=1
   - ❖ Review Period From 1 to 5
9. Click **Search**. When you run the example search, the results are organized and displayed ascending by Category ID, and then ascending by Review Period. You must click the Content Information link or icon to view the review period, unless you have set up a My Headline View type of Search. For more information, see Customizing the My Headline View Search Template (page 6-21).

CUSTOMIZING THE MY HEADLINE VIEW SEARCH TEMPLATE

The My Headline View search template installed with Records Manager DoD Edition allows you to customize what metadata information is displayed in the line listing of a search results page. This can be useful if there is specific information you frequently review on a content information page, but would like faster access to it, or if you want to compare certain metadata across several records in a search result. Metadata options are selected from the choice list and then added to the view. Selected metadata is displayed vertically in the Description area on a search results page.

Figure 6-10 Customized My Headline View search results (partial view)



To customize the My Headline View Search Template, complete the following steps:

1. Click **My Oracle—My Profile**. The User Profile page is displayed.

2. In the User Personalization Settings area of your User Profile page, select **My Headline View** from the **Search Template** list.
3. Select the metadata field to display from the **My Headline View Fields** list.
4. Click **Add**. The metadata field name is displayed in the My Headline View Fields text box. Repeat for each field to display in your headline view.
5. To save your changes, click **Update**.

Note: You can add any number of metadata fields to the My Headline View. The fields are displayed in the order added. To reorder fields, click **Clear** and add the fields in the desired order. Prior to clicking **Update** on the User Profile Page, you can restore previous choices by clicking **Reset**.

Appendix

A

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