Oracle® Universal Records Management

Oracle Universal Records Manager Adapter for FileNet Administration Guide

July 2008

Universal Records Manager Adapter for FileNet Administration Guide,
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1 Administration Overview

1.1 Overview

This section contains the following topics:

- About This Guide

1.2 About the guide

This guide provides instructions on how to use the FileNet Adapter on a computer running on Microsoft Windows.

1.2.1 Audience

This guide is intended for those users who will be running the adapter to crawl documents and apply dispositions to them. This gives step-by-step procedures on how to run the adapter.

1.2.2 Conventions

The following conventions are used throughout this guide:

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

2 Functional Overview

The whole functionality of the Adapter is segregated into the following modules:

- Adapter Initiation and Configuration
- Adapter Behavior

2.1 Adapter Initiation and Configuration – Administration. jar

The Adapter provides a class, which acts as the entry point to start execution. In the Adapter initiation, Adapter and Adapter Engine are instantiated and a listener is added to the Adapter Engine for listening to the Events. Finally, the Adapter is activated to allow the communication between URM and FileNet repository. The adapter configuration involves details about adapter implementations which enable it to customize its internal behavior to appropriately host the adapter. It describes the capabilities of the adapter as well as how each capability setting alters the framework's internal behavior.

2.2 Adapter Behavior – FNAdapter.jar

The FNAdapter.jar file contains the FileNet Adapter functionality. It provides various classes (which extend from the generic adapter implementations) to implement the various tasks like Document declaration, retention and record management. These tasks are carried out at the URM end and this FileNet Adapter serves as the bridge between the URM and the FileNet conveying to FileNet Content Engine the actions performed on the documents at the URM end. The FileNet Adapter will be able to perform the following functions:

2.2.1 Self description. The adapter supplies several classes to be used by Administration Utility. These classes define what metadata (names, data types, etc.) the adapter can supply to the Oracle Universal Records Management application, define windows controls for use in search creation, and define fields that can be searched.

2.2.2 Document declaration. The Adapter supplies functionality to evaluate searching expressions, and use the results to get a list of metadata of documents for submittal to the Oracle Universal Records Management application.

2.2.3 Retention management on selected files. Retention management is performed by collecting metadata belonging to the selected file and sending it to the Oracle Universal Records Management application. When the retention period has expired, the adapter will perform the appropriate disposition action (archive or delete) against the file.

2.2.4 Record management on selected files. Record management ensures that a file cannot be modified or deleted from the FileNet repository if it is checked into the URM as a record. All such records then become uneditable from the FileNet end. Versions of records can however be created.

2.2.5 Document freezing. A litigation freeze issued from the Oracle Universal Records Management application causes the adapter to freeze the document. This document then becomes uneditable. Versions of frozen documents can be created and a frozen document can be thawed.

2.2.6 Document Disposition. Following are the dispositions supported by the FileNet adapter that can be issued by the Oracle Universal Records Management application:

- **Archiving -** Following an archive disposition issued by the Oracle Universal Records Management application, the adapter creates a zip of the original content.
- **Destroy -** This completely destroys the document from the repository.
- **DeleteRevision -** This deletes the selected version of the document.
- **DeleteAllRevisions -** This deletes all the versions of the particular document.

3 Detailed description

This section describes the procedure for configuring the administration.jar and running the FNAdapter.jar file.

Refer to 'ReadMe For Config.txt' file in the installed directory of the FileNet Adapter to configure the adapter search and searchable/retrievable fields.

One of the important configuration options is how superceded documents are to be treated during a search. The following paragraphs describe the configuration options for superceded documents.

The flag "TREAT_SUPERCEDED_VERSIONS_AS_UNFILED" allows superceded versions to be treated as if they were unfiled.

FileNet does not track the folder that a superceded version is filed in. It is assumed that a superceded version is filed in the same folder as its released version. If this flag is set to false the adapter will query back to FileNet for each superceded version it finds to determine which folder it belongs to. If a search is finding a high volume of superceded documents then this will slow the search down considerably. This is a real possibility when doing a historical search, but is not very likely when doing a normal forward walking search. If the cost of trying to determine the folders for superceded versions is too high this flag can be set to true which will cause the adapter to treat superceded versions as if they are unfiled. This will mean that the adapter would not need to continually query against FileNet to determine the folder for superceded versions. It would also mean that superceded versions would only be found by adapter searches which have selected the unfiled folder as one of the archives for the search.

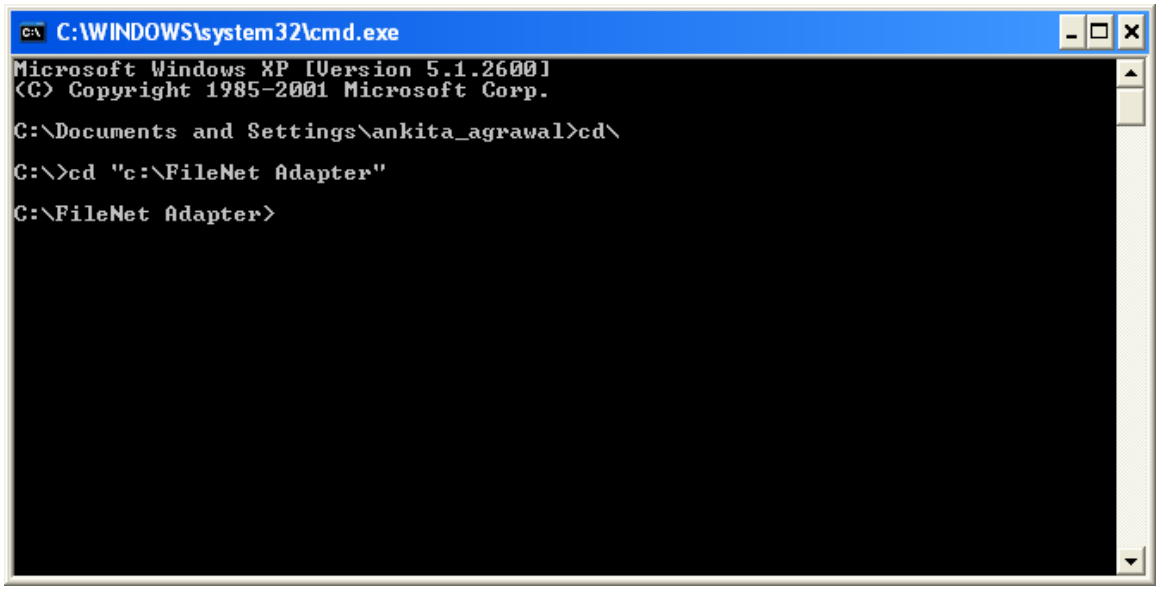
3.1 Configuring the Adapter through Administration screens

Before starting the FileNet Adapter, it needs to be configured through the administration screens. The steps to execute administration.jar file are as follows:

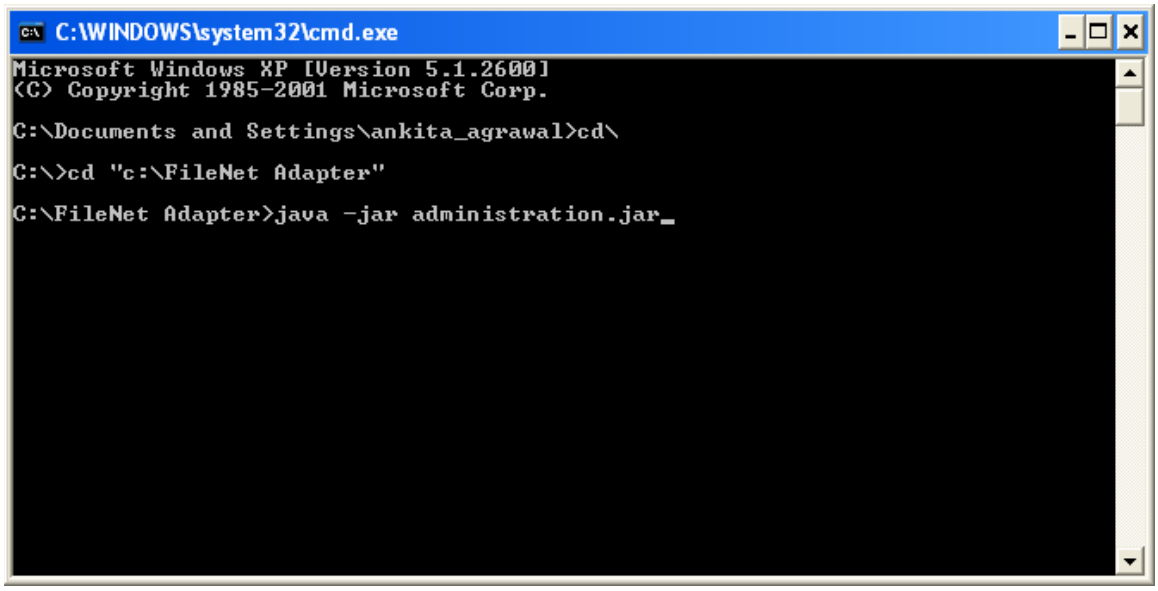
1. Open the command prompt either by

Start →run→ type "cmd" in run window.
Or by
Start→programs→accessories→command prompt.

2. Change the path in the command prompt to the directory where administration.jar file is located. (e.g.: path of administration.jar file is C:\FileNet Adapter)

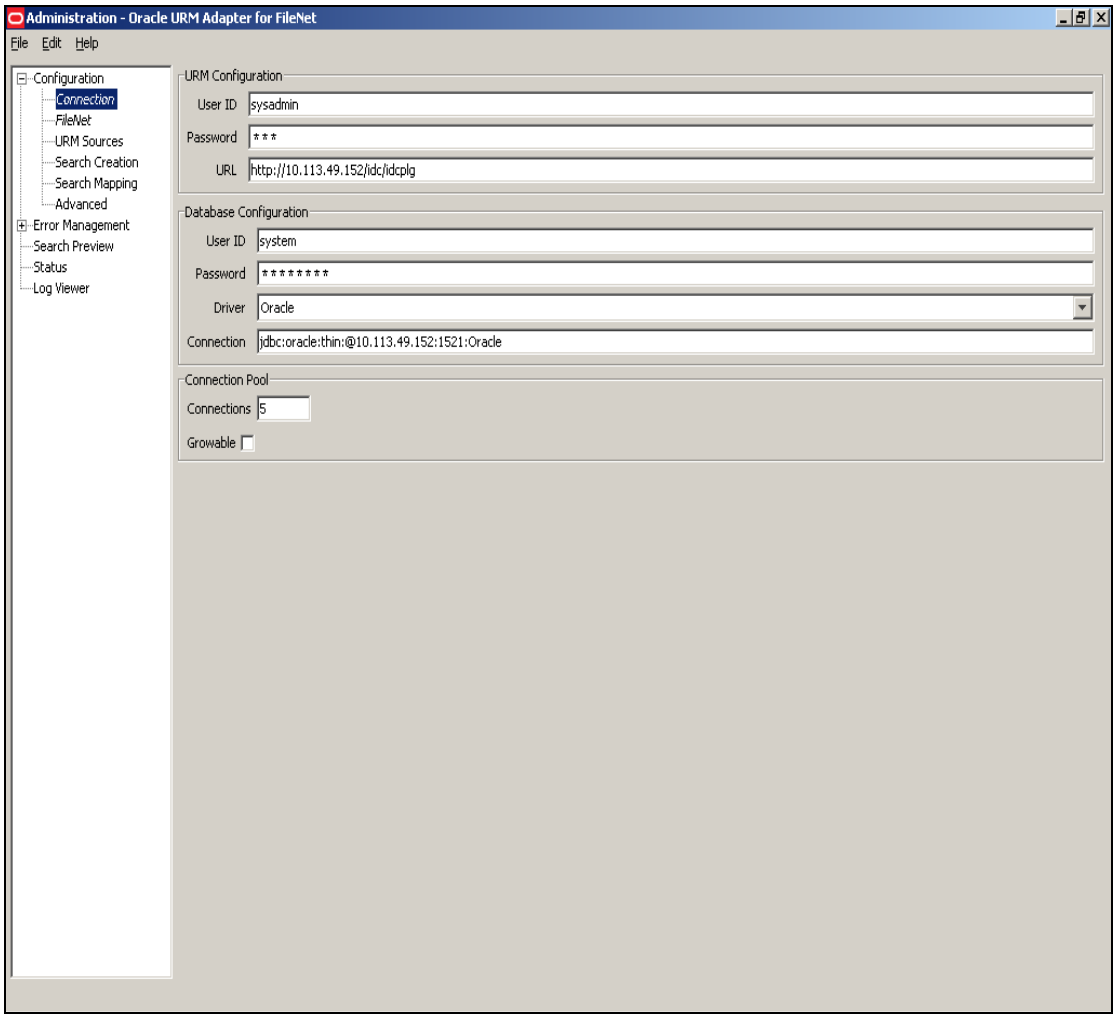


3. Execute the command java –jar administration.jar on command prompt to run the jar file.



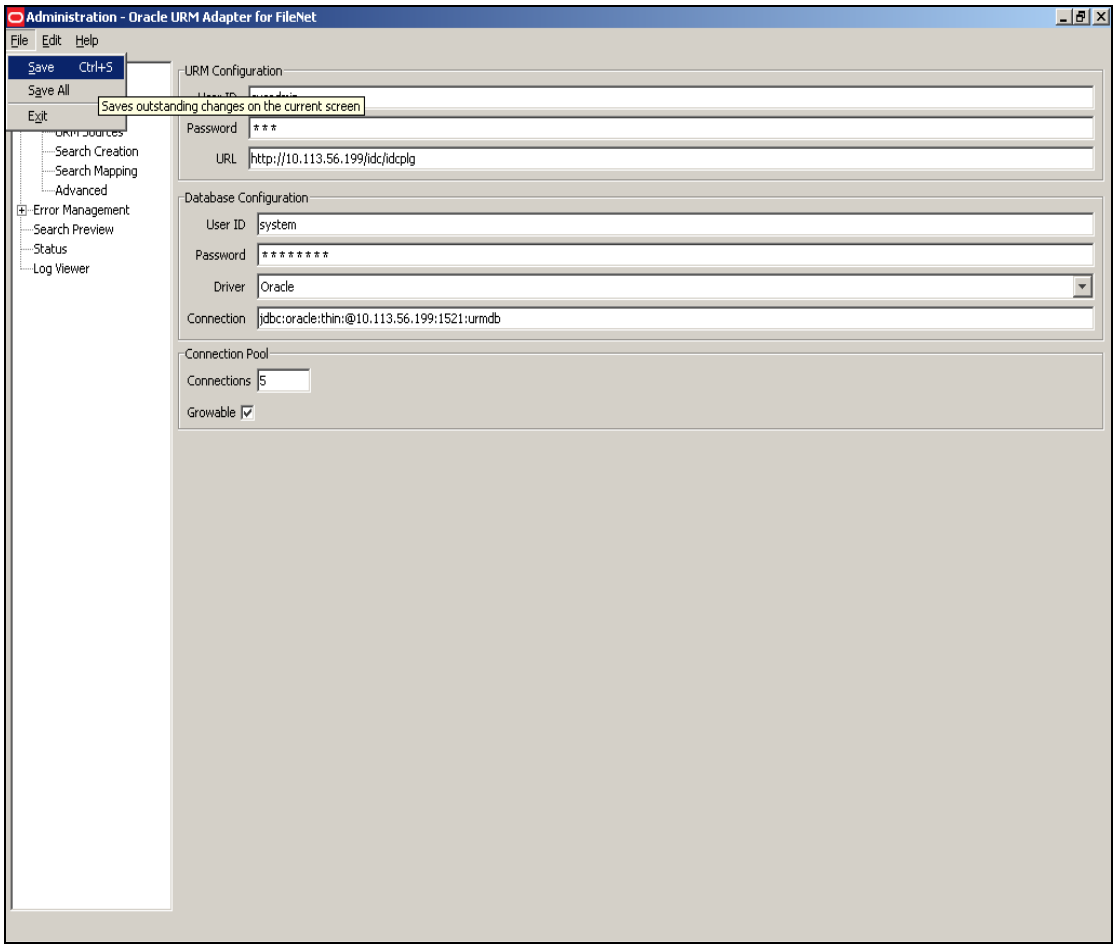
4. Subsequently the executable administration. jar file gets started as shown below.

5. A new window Administration-Oracle URM Adapter for FileNet will open. Here the URM and its database configuration details are provided. These details are saved by the Adapter for further reference.

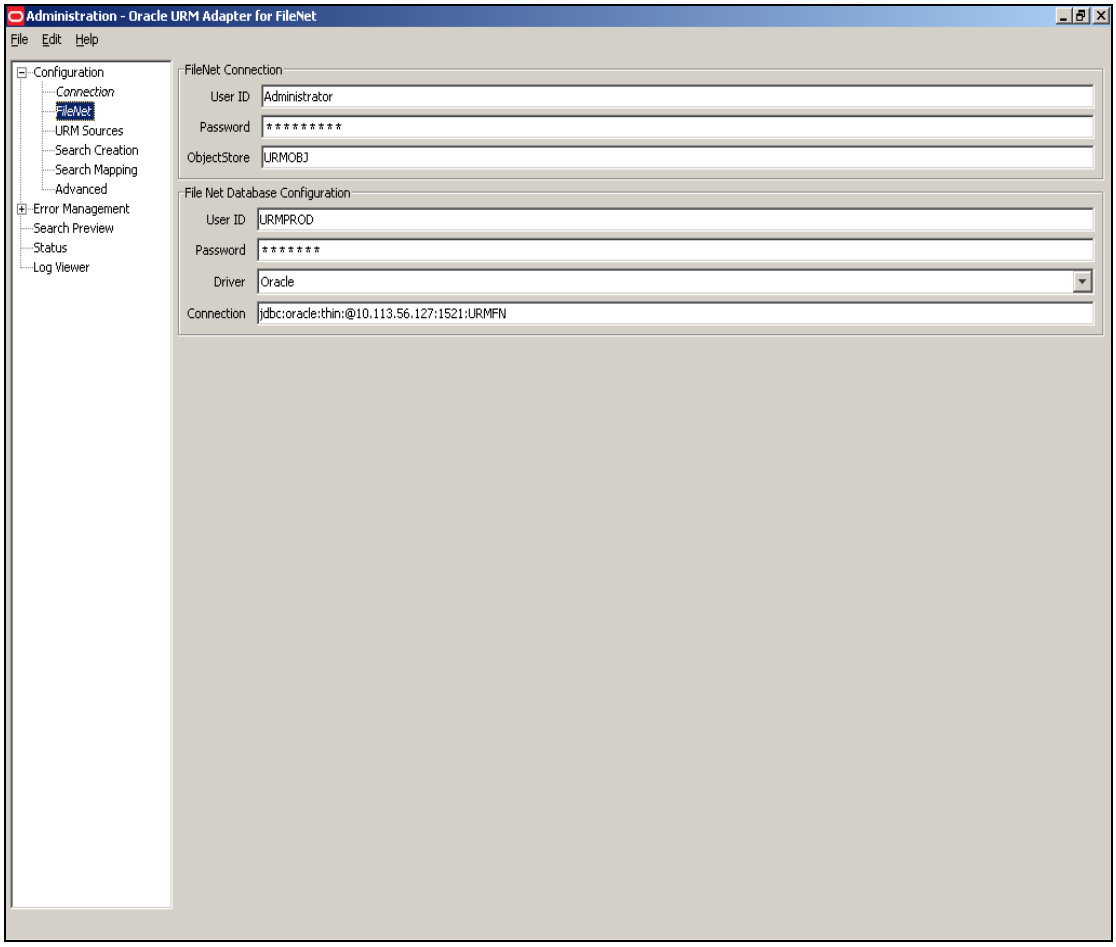


6. Fill the following details in Connection screen and click “save” option of file menu.

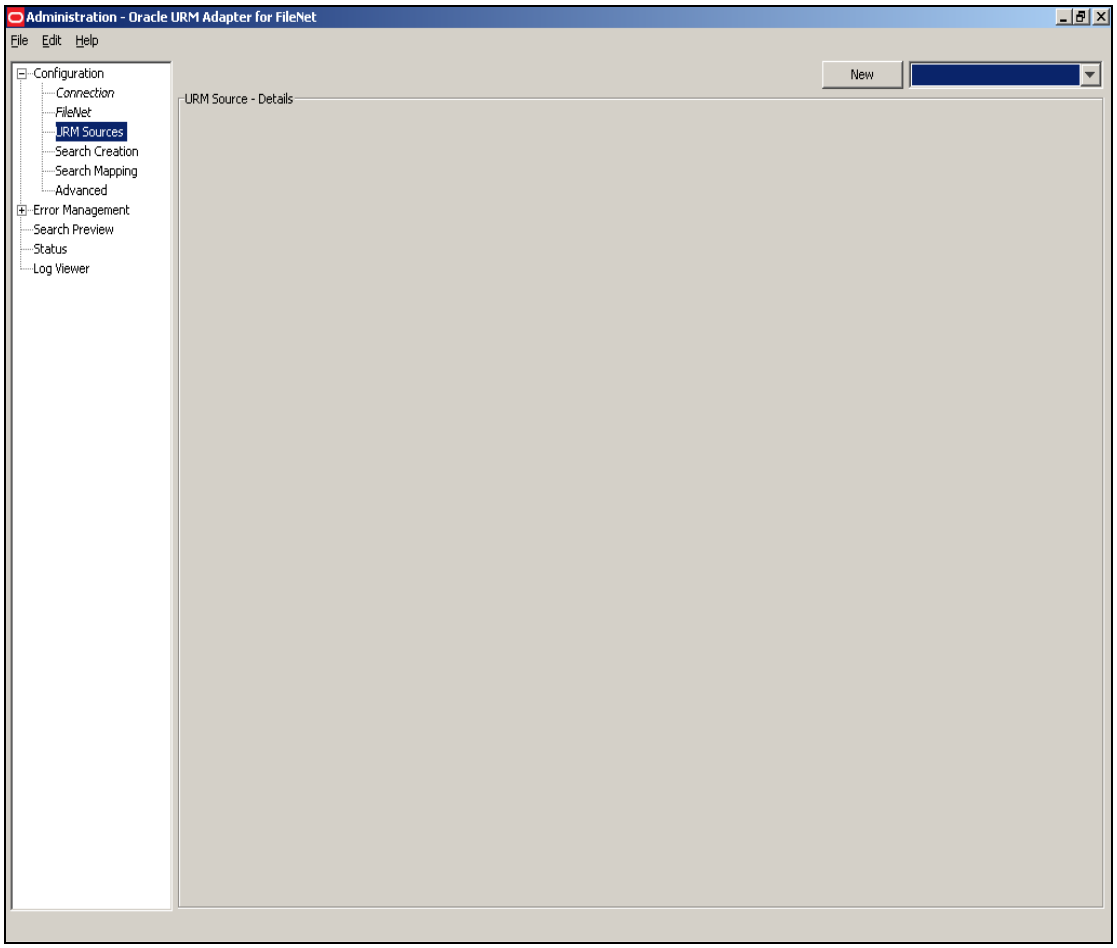
- URM Configuration
  a) Userid
  b) Password
  c) URL (e.g.: http:// <hostname>/idc/idcplg)
- Database Configuration
  a) Userid
  b) Password
  c) Driver
  d) Connection
- Connection Pool
  a) Connection
- Growable - This needs to be checked.



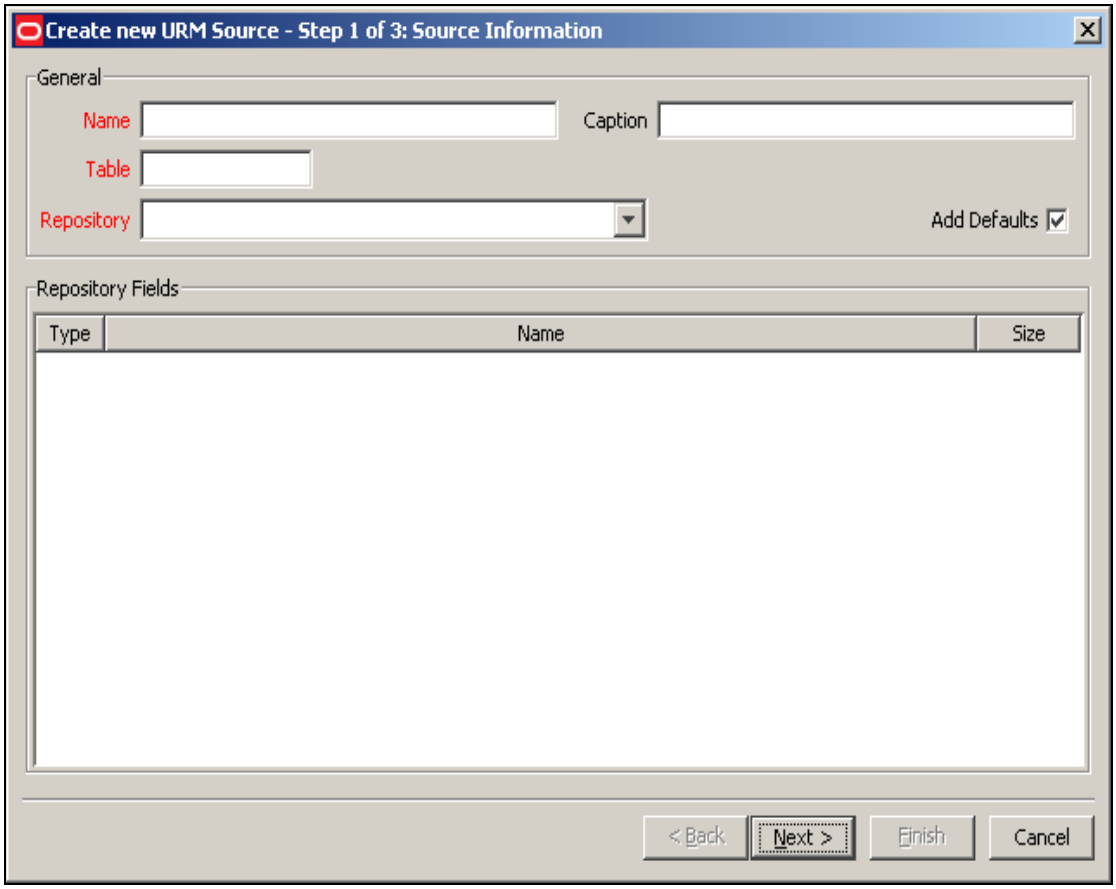
7. The next screen shows the FileNet Database connection details. Fill in the FileNet User ID, FileNet Password and ObjectStore. Next the FileNet database configuration details containing the database User ID, Password, Driver and Connection string is to be provided. Click “save” option of file menu.



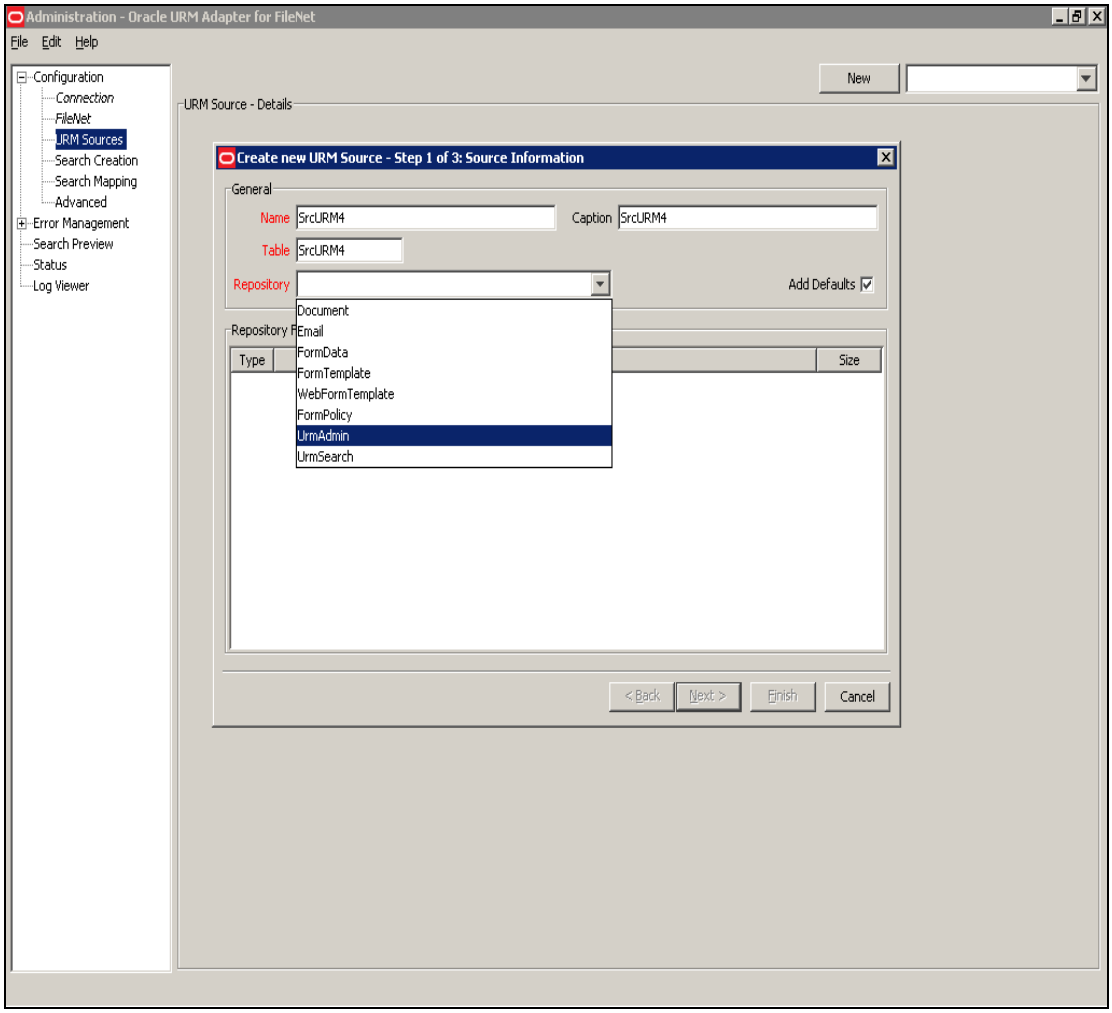
8. Create a new Source by clicking the URM Sources. A New button and a new screen will appear. The sources made here are also created and shown in the “External Content” section in URM.



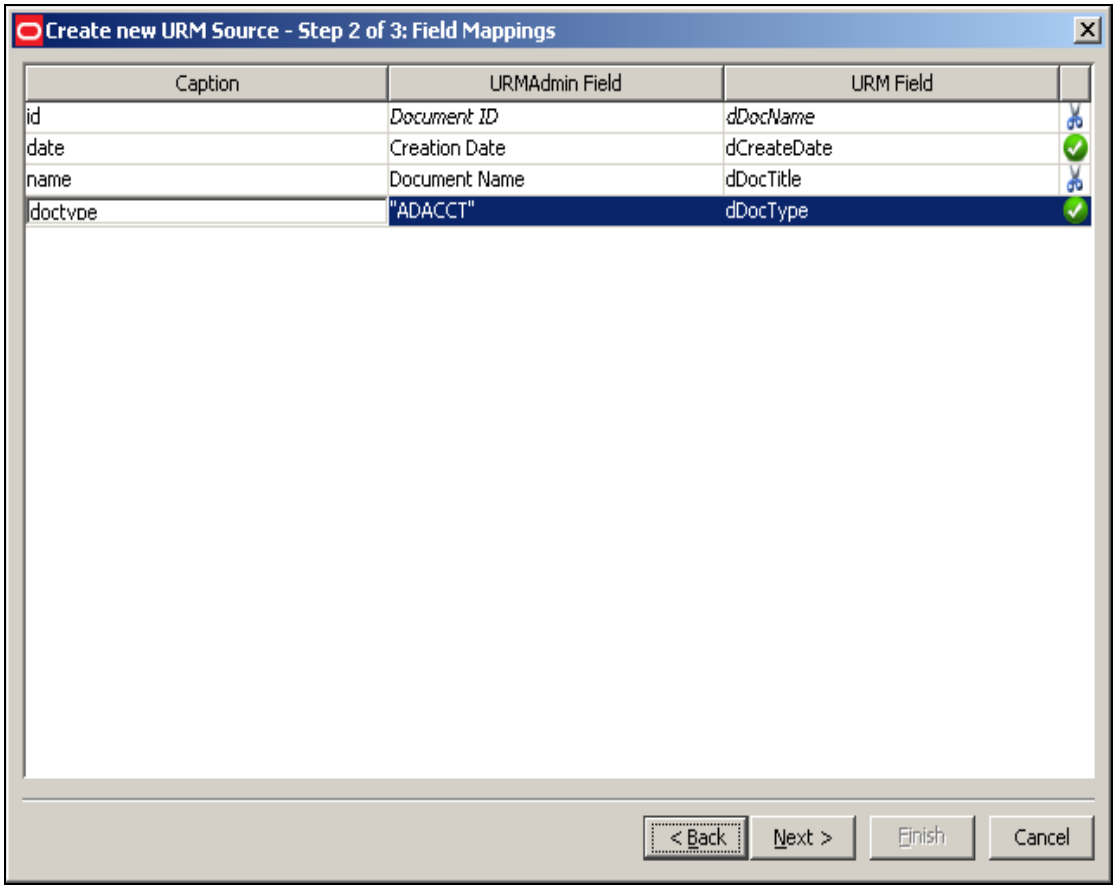
- Clicking on the **New** button a new window “Create new URM Source” opens. Enter a valid Name, Caption, Table name and select the FileNet repository for which the datasource is to be created. Then click Next button.



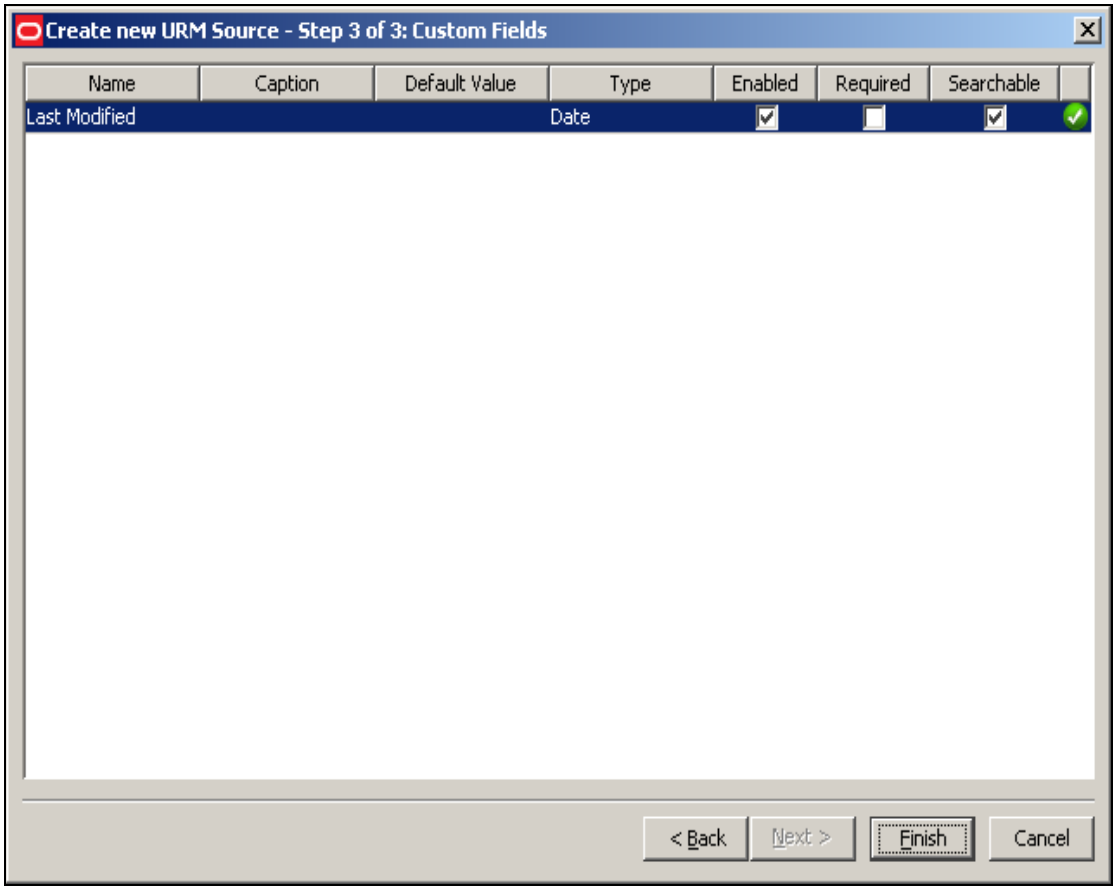
- Enter Name, Caption and Table fields and select Repository from the list.



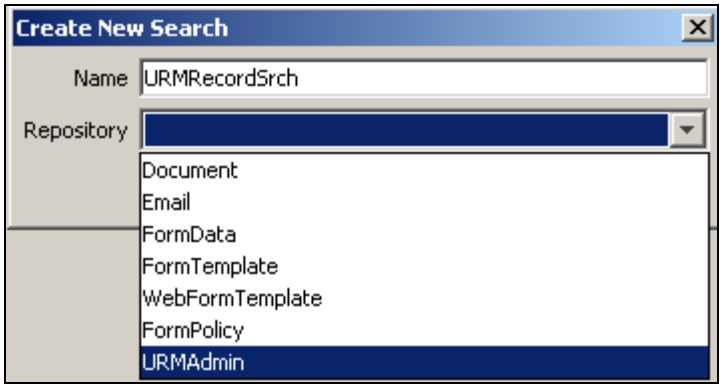
- Enter a Caption and map FileNet Repository fields to URM fields. Right click field Mapping window and select Add. Select any additional fields from URM and map them to the FileNet fields. E.g.: Select URM field as dDocType and map it to the corresponding FileNet Repository field. Click Next.



- In the next screen, make the last modified date as searchable by checking the Searchable checkbox. Click Finish.

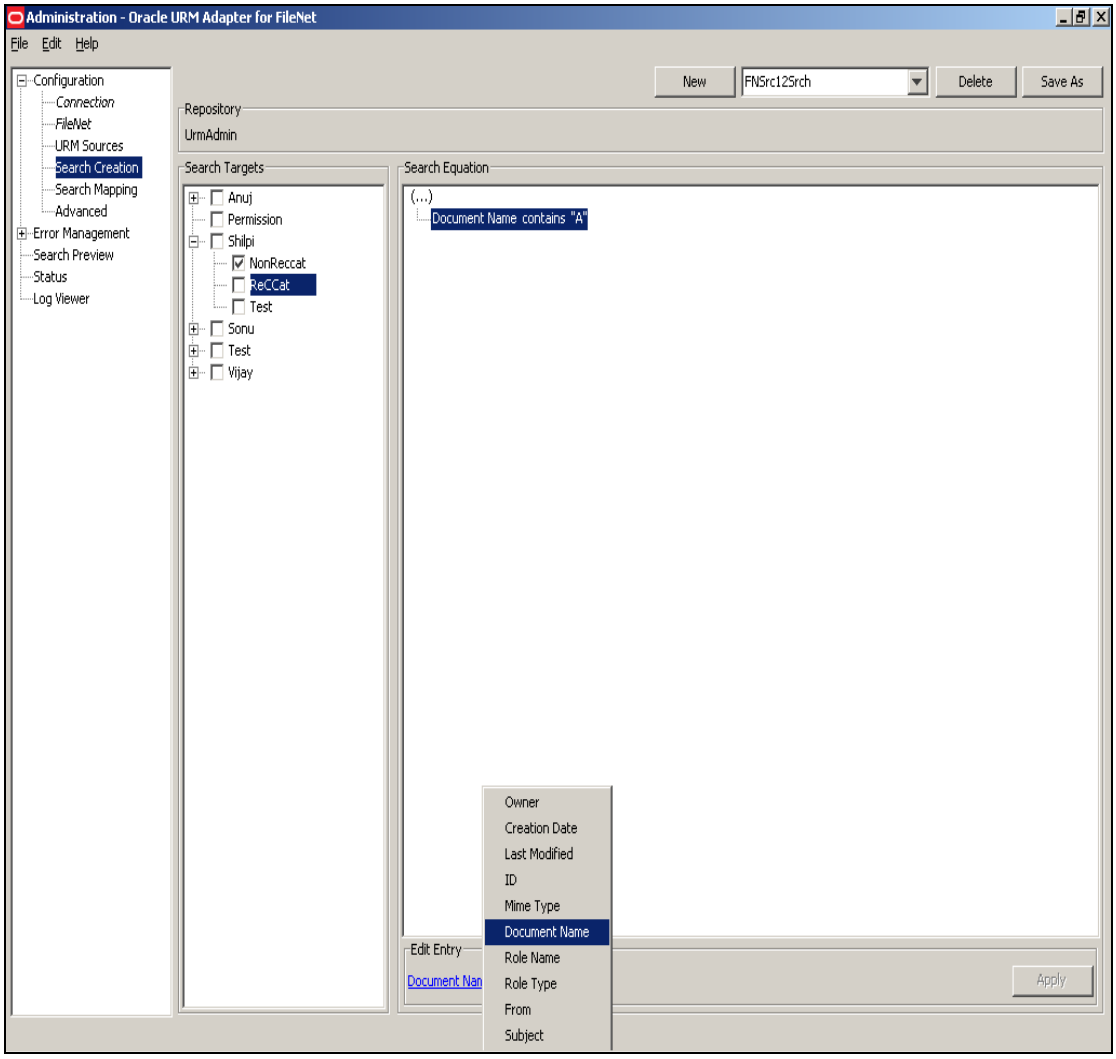


9. Click Search creation from the Configuration tray. Click New to open the “Create New Search”. Enter the Search name and Repository type. Click OK.

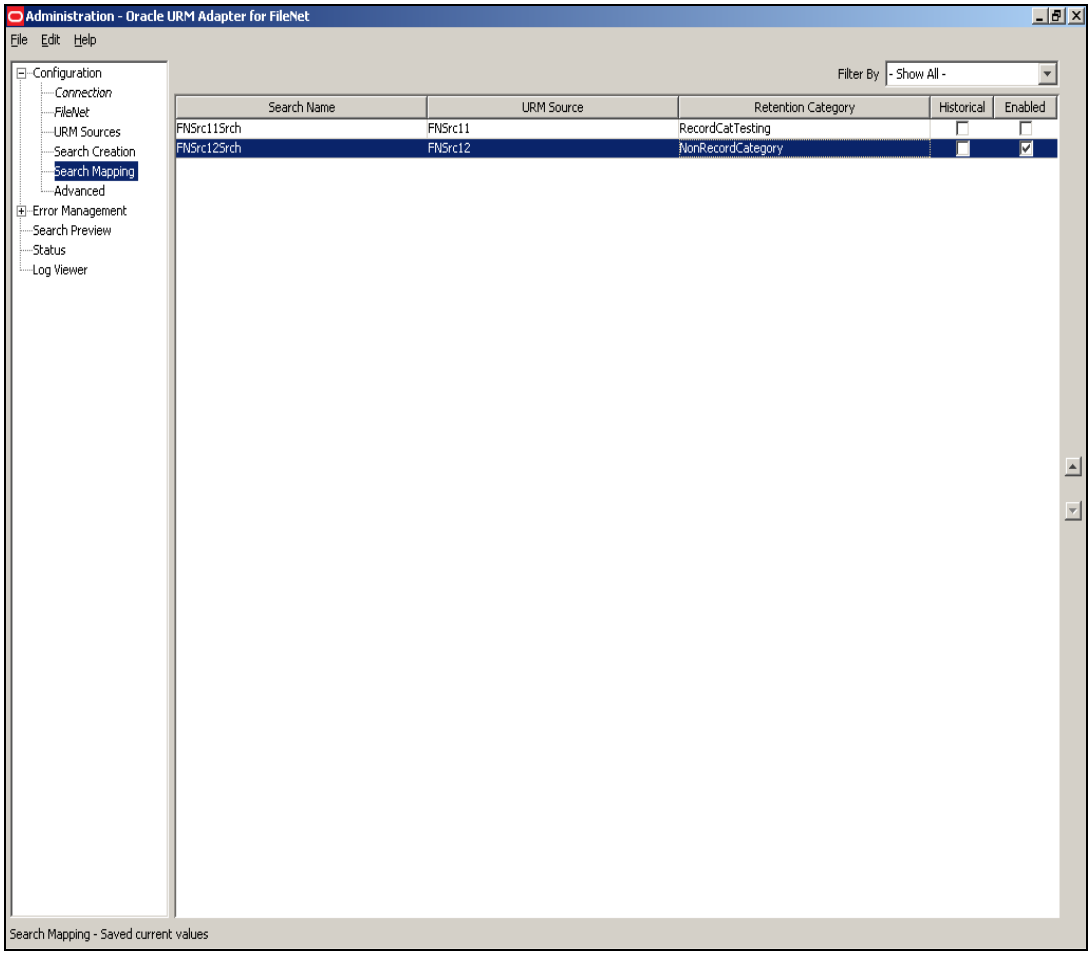


When defining a declaration search, a repository will be selected to limit the search to a document class type. The selected class type will limit the search to finding only documents that are of that type or any of its hierarchy of sub types.

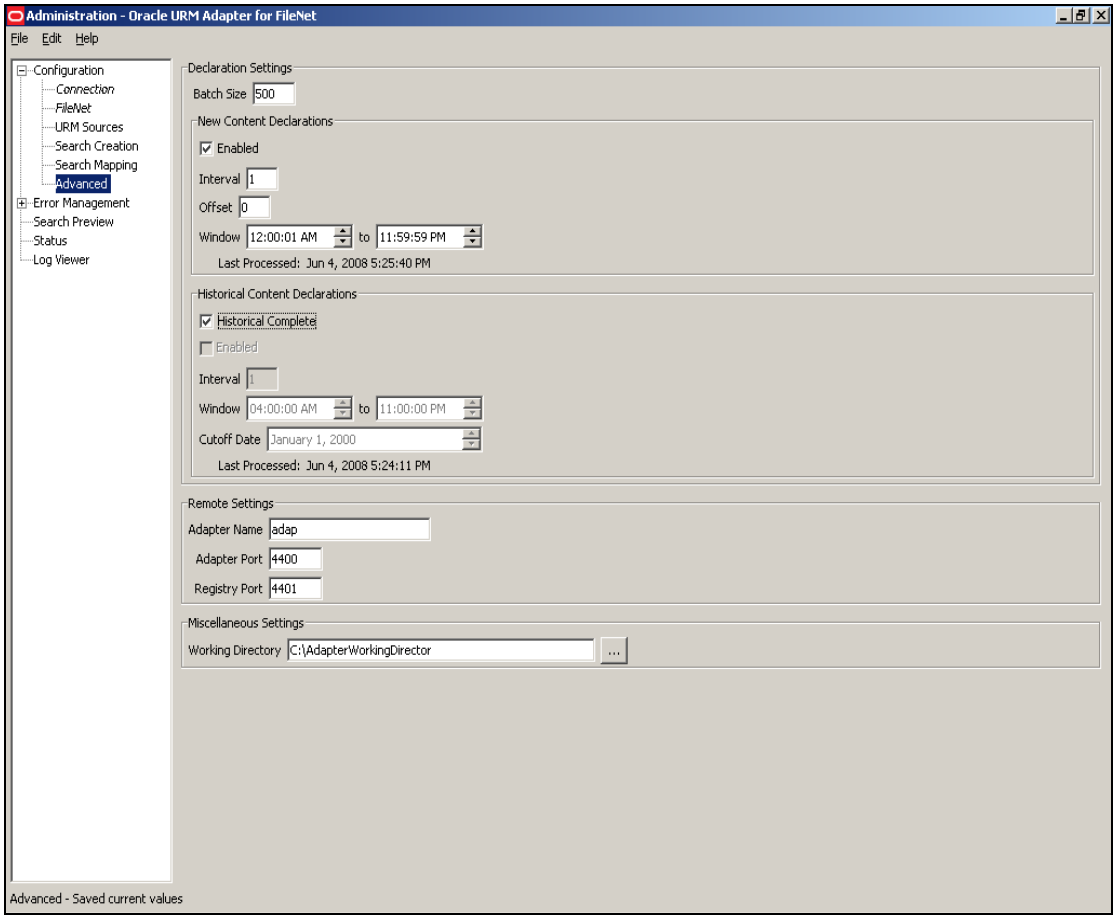
10. Select the search targets from FileNet Repository Folders. Right Click in the search equation screen and select “Add Terms/Add Groups” to enable the “Search Equation Fields”. Define the search equation using the fields provided in the “Edit Entry” box and then click on ‘Apply’ button. After entering all entries save the contents by clicking on “save” option of file menu. The New search name will be stored in dropdown list in search creation page.



11. Click on the Search Mapping of Configuration tray. Select the search name from "Filter by" drop down list. Select URM source, Retention Category for a search. Save all the changes by clicking on Save option of file menu.



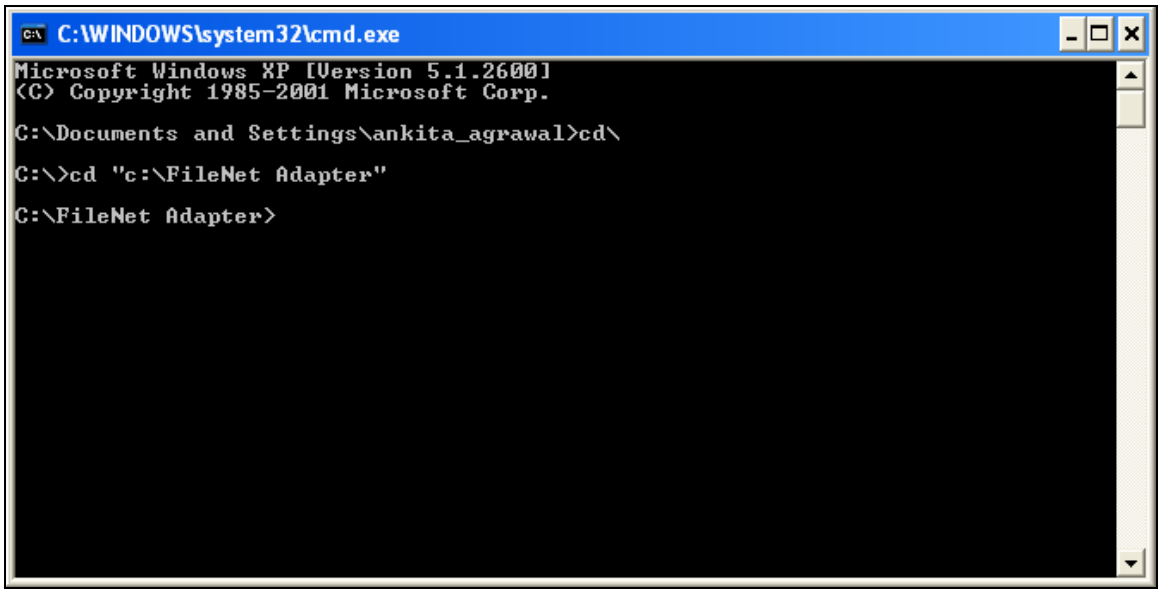
12. Enter data in the declaration settings of the advanced screen. New content declarations (for forward search) and historical content declarations (for backward search). Also provide the name for the adapter along with the ports and working directory information. Please note that the historical search runs backward in time starting from the Last processed date to the Cut off Date (Cut off Date should be any day before the Last Processed Date).



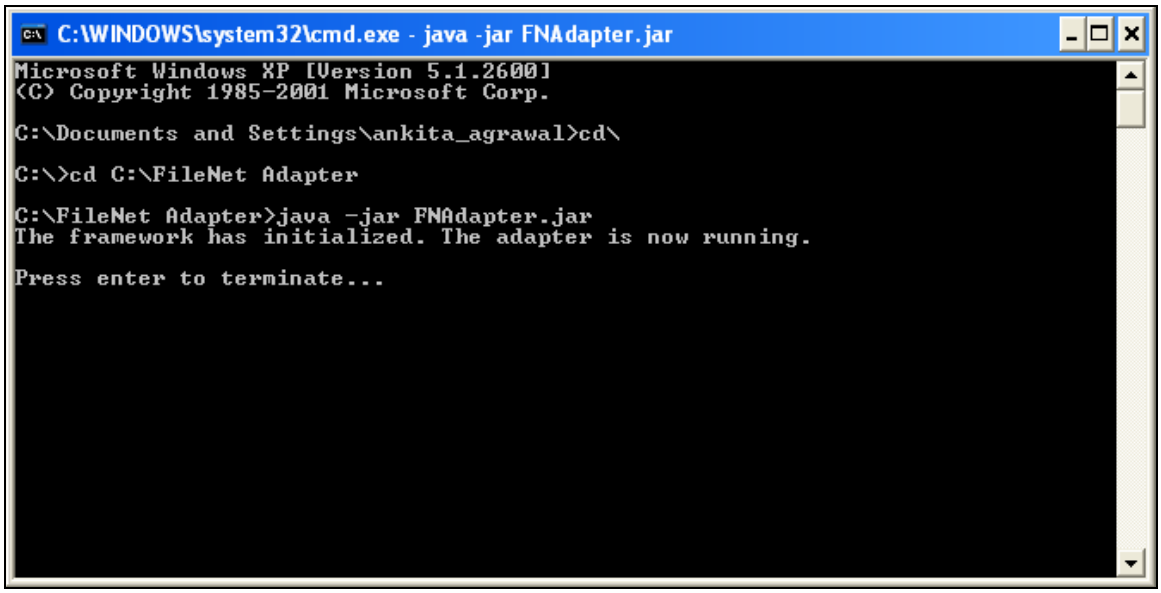
13. Before the search preview is displayed the FNAdapter.jar file should run. Open a second command prompt window by either of the two ways below:

Start →run→ type “cmd” in run window.
Or by
Start→programs→accessories→command prompt.

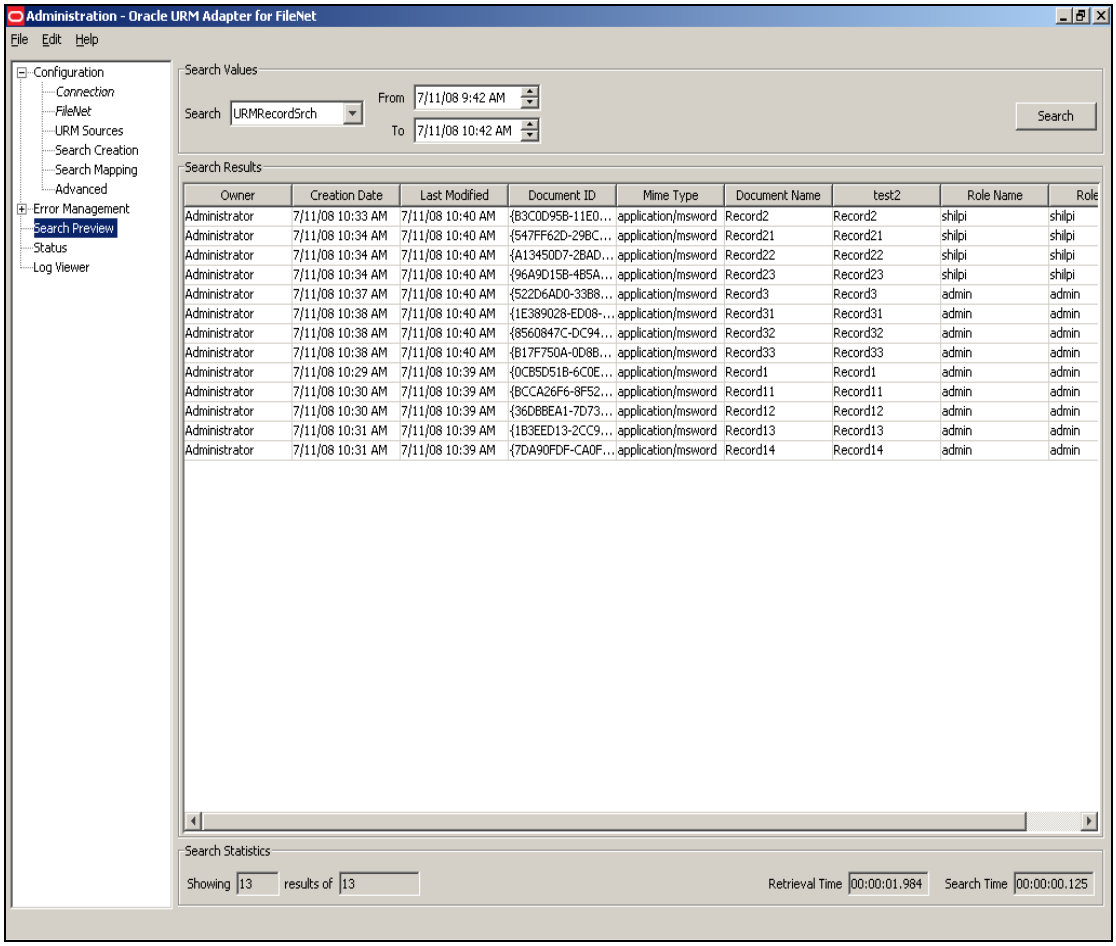
14. Now navigate to the directory where FNAdapter.jar file is located (e.g.: path of FNAdapter.jar file is C:\FileNet Adapter).



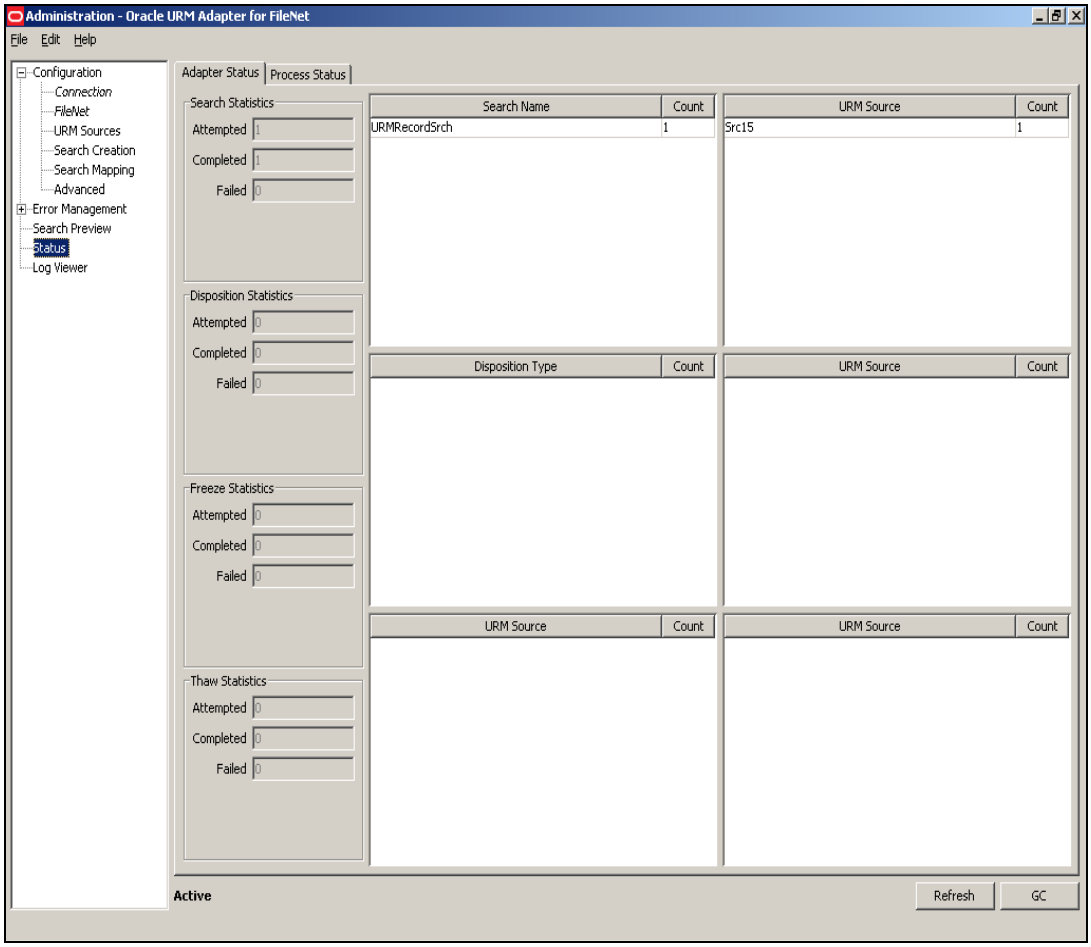
15. Execute the command java –jar FNAdapter.jar in a command prompt to run the adapter jar file. This will initialize the adapter framework.



16. Search results based on a Search (created in Section 3.1, point 10) should be visible in the search preview screen. In the search preview screen select the appropriate search that needs to be run and set the time field. Now click on search and all the documents satisfying the search criteria get crawled. The details of all these searched documents are shown in the lower 'Search Statistics' pane.

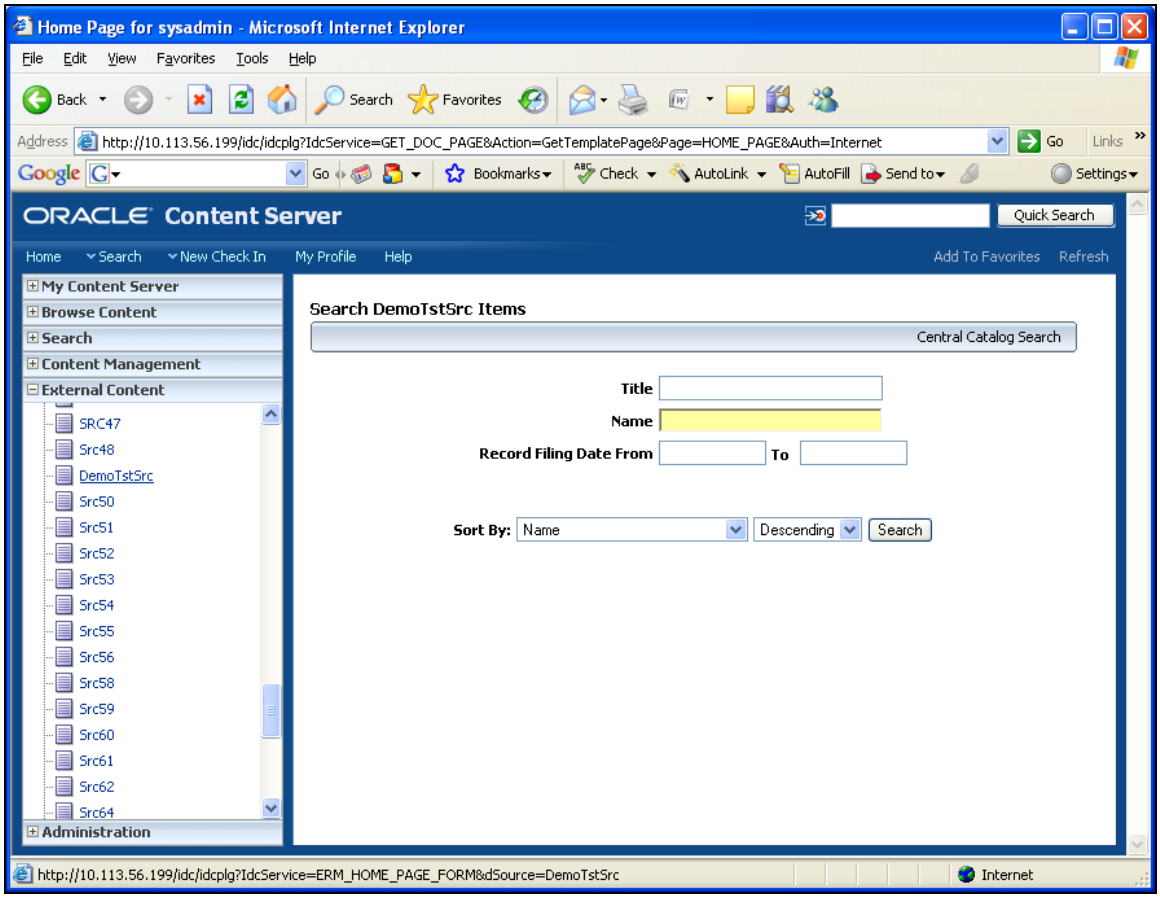


17. The status screen shows the status of Search, Disposition, Freeze and Thaw Statistics. Click the Refresh button to view the latest statistics.

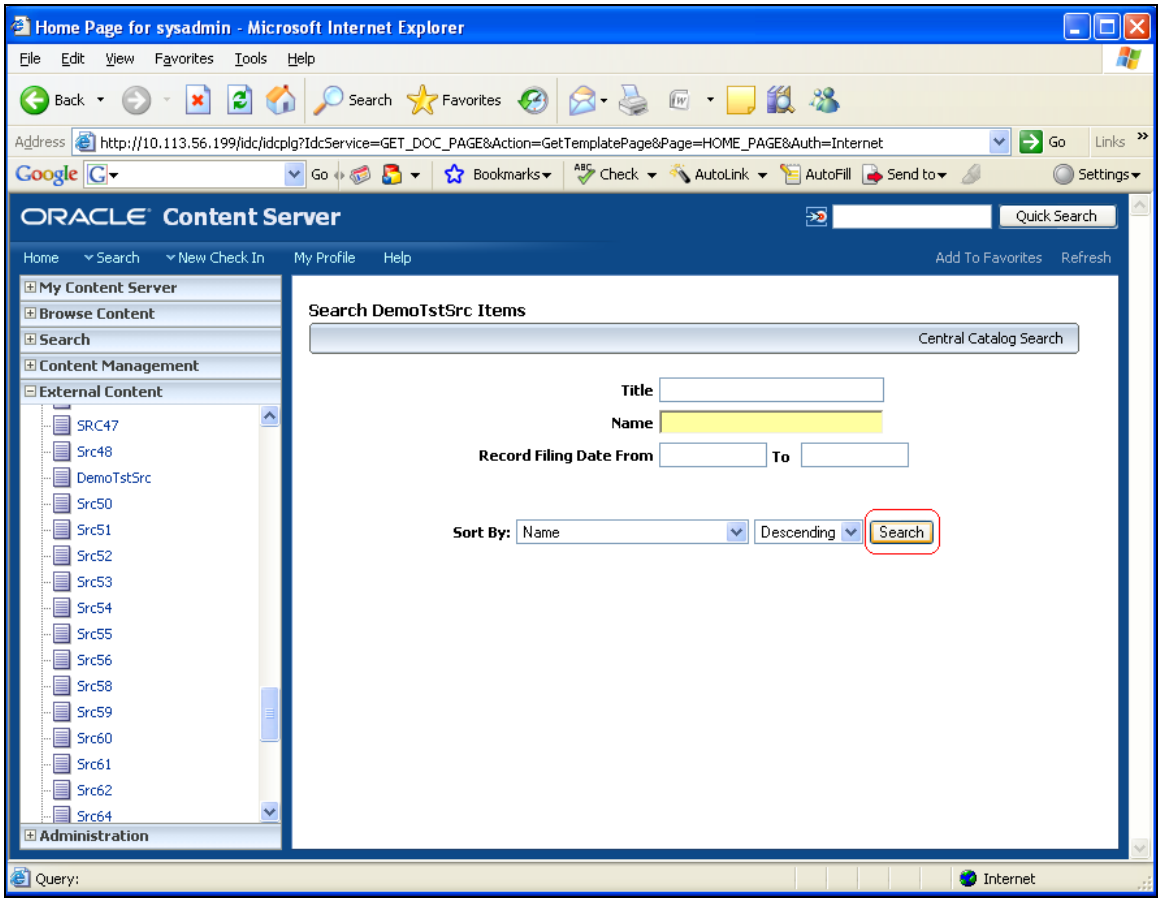
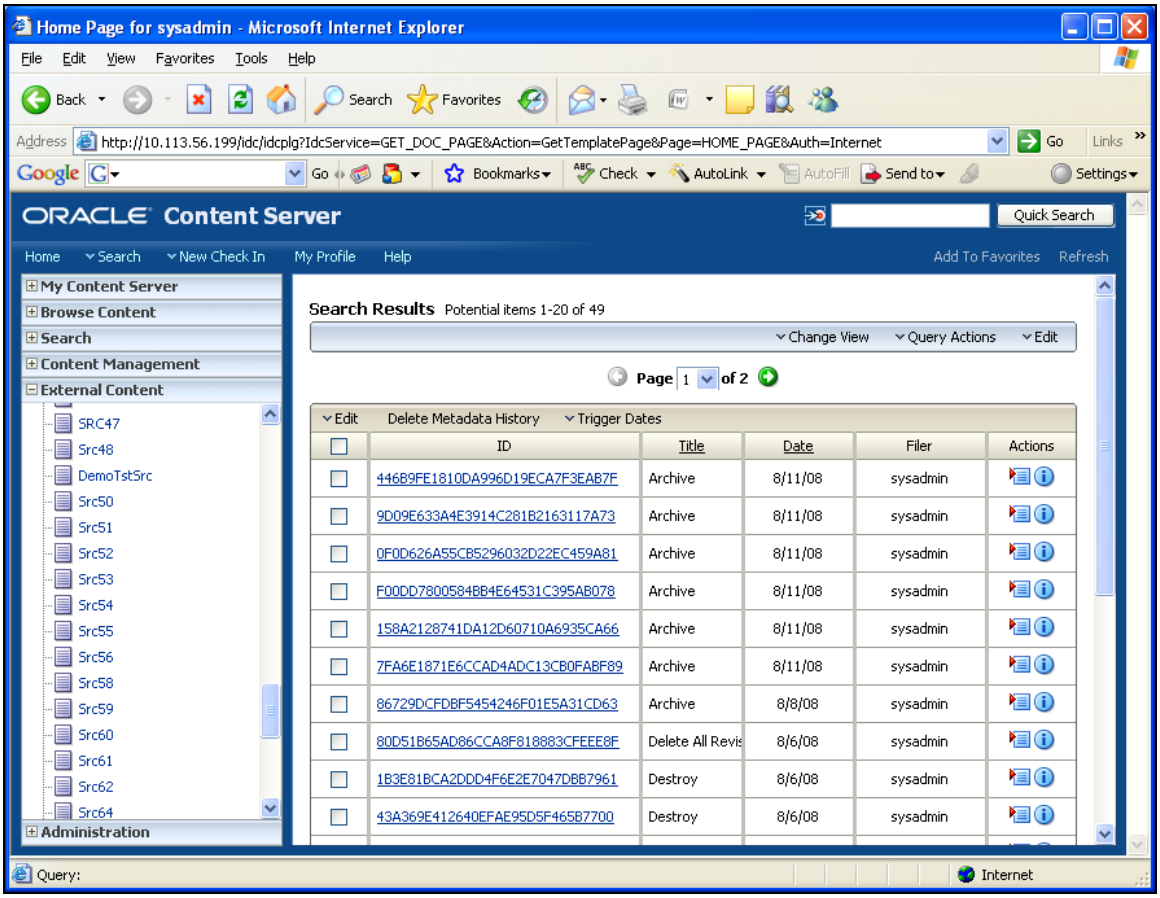


4 Sources created through administration as viewed from URM

- The sources created in previous pages (Section 3.1, point 8) through administration file are seen in the external contents of the URM.



- Next click the Search button as shown in the screen below to list the documents that have been crawled.



- The search results are shown below.