Oracle® Fusion Middleware

User's Guide for Universal Records Management

11*g* Release 1 (11.1.1)

E10733-01

May 2010

Oracle Fusion Middleware User's Guide for Universal Records Management, 11*g* Release 1 (11.1.1)

E10733-01

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Preface

This guide provides instructions to use Oracle Universal Records Management software (Oracle URM) on a Oracle Universal Content Management Content Server.

Audience

This guide provides instructions to use this product. The guide is intended mainly for end users of the product.

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Related Documents

The following documentation is available:

- *Installation Guide* for your product: This document provides information about installing the software.
- *Oracle Fusion Middleware Setup Guide for Universal Records Management*: This document provides information about setting up the software.
- *Oracle Fusion Middleware Administrator's Guide for Universal Records Management*: This document provides information about administering and managing the software.
- *Oracle Fusion Middleware User's Guide for Universal Records Management*: This document provides information about common tasks performed by users when using the software.

In addition to these guides, you can also access information about the product with context-sensitive tooltips, quick help, and help menu.

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.
IntradocDir`/ucm/urm/config`	The default location for configuration files mentioned in this documentation. *IntradocDir* is used to refer to the root directory for the actual configuration and data files specific to an instance deployed on the Oracle UCM domain on an Oracle WebLogic Server.

1 Introduction

This section covers the following topics:

- "About This Guide" on page 1-1
- "What's New" on page 1-2
- "Using Help" on page 1-4

1.1 About This Guide

This guide provides instructions to use the product software. In general, it does not contain details about setting up the product. For example, this guide contains instructions about browing retention schedules but it does not contain instructions for creating those schedules. Details about setting up the software is contained in the *Oracle Fusion Middleware Setup Guide for Universal Records Management*.

A glossary of frequently used terms is also included in the *Oracle Fusion Middleware Setup Guide for Universal Records Management*.

Details about processes are contained in either this guide or the *Oracle Fusion Middleware Setup Guide for Universal Records Management*. If a task can only be accomplished by users with administrative privileges, that task is discussed in the Administrator's Guide. If the task can be accomplished by users with administrative *or* user privileges, it is discussed in the User's Guide.

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.

This guide assumes you are using the Trays layout and that you have some familiarity with Oracle UCM and its use. References to Fusion Middleware documentation are made throughout this documentation to assist in finding information.

In this document and other documents in this product set, the terms "content" and "record" are synonymous and can be used interchangeably.

1.2 About This Product

Oracle Universal Records Management (Oracle URM) is an enterprise-wide 5015.2 Chapter 2 and Chapter 4 certified electronic and physical records management system. It provides a single application that can be used to create and administer the information life cycle for both physical and electronic information. It allows organizations to apply retention policies as well as legal discovery and holds to relevant content across the enterprise, from e-mail attachments and content stored in file servers to physical records in a warehouse.

It also has a framework for extension to other repositories via adapters. This guide discusses records management features in both Content Server and Oracle URM. Features involving physical content management and external adapter management are only available when Oracle URM is installed.

The following options are available after installing the software:

- **Minimal**: installs a small amount of Oracle URM metadata fields and a limited subset of disposition actions. This is the initial default when the software is enabled.
- **Typical**: enables Physical Content Management as well as all disposition actions and all features except for DoD Configuration (Department of Defense), Classified Topics, FOIA/PA tracking (Freedom of Information Act/Privacy Act), and Email.
- **DoD Baseline**: enables the features from a Typical installation with the addition of DoD Configuration and Email.
- **DoD Classified**: enables all features except for FOIA/PA.
- **Custom**: enables the ability to choose a variety of features. Note that some disposition actions are dependent on other actions. If an action is selected, dependent actions are also automatically selected.

Throughout this documentation, the term "Oracle URM" refers to those features available in the majority of scenarios. The features available at each site will vary depending on the options chosen during configuration.

1.3 What's New

Previous versions of this software were divided into two editions:

- Records Manager DoD Edition, which was used for DoD compliance tracking
- Corporate Edition, which did not contain many of the features included in Records Manager DoD Edition.

As of this release, much of the product functionality has been merged and functionality can be chosen after installation by selecting different features for configuration.

The classification scheme hierarchy functionality for use with the *Model Requirements for the Management of Electronic Records* (MoReq2) specification is also new for this release. This functionality can be enabled by setting a configuration variable.

Sites which are upgrading from previous versions of the software will see increased flexibility and functionality. Specific differences are available in the Installation Guide for the product.

The following list discusses some specific changes to the product from previous releases. The features at each site vary depending on the options chosen at configuration:

- The **definition of a record** is now configurable. Options on the Create Retention Category page allow a records administrator to choose whether items in that category can be revised, deleted, edited, or will be permanent.
- **Physical Content Management** documentation is incorporated into this documentation at this release. Separate documentation no longer exists for Physical Content Management.
- A **print** option is now available on every screen.

- **Menus** have been extensively changed. Most options are now available by using the **Records** or the **Physical** menu option on the Top menu.
- You can easily **view your assigned rights** by going to the My Profiles page. Retention administration rights are displayed there as are your assigned roles.
- A **dashboard** is now available which can be used to quickly organize product features for easy access and use. This is discussed in detail in the *Oracle Fusion Middleware User's Guide for Universal Records Management*.
- **Out of date content** (not the current version) is now designated as such with a line through the content name in search results. Any item which is obsolete, canceled, rescinded, and so on is designated in this manner.
- **Page navigation** menus on the search results page have changed. If more results are returned than are configured in the User Profile page, the page navigation dropdown menu indicates that other pages of information are available for viewing.
- A **Favorites** listing can be created, similar to bookmarked browser "Favorites". Users and aliases as well as categories, freezes and other retention objects can be added to the Favorites menu. Favorites items are used to populate option lists, such as when creating freezes. For example, if an item is on your Favorites list, it appears on the pulldown list when you choose a freeze name. This helps to narrow the choices when using this functionality.
- Content stored in folders can now be transferred to **volumes**. When a volume is created, all content in the folder is moved to a newly created volume folder.
- **Services** used in this product are now documented in the *Oracle Fusion Middleware Services Reference Guide for Universal Content Management*. See that guide for details about the services used and how to implement new services.
- **Screening** can now be accessed through the search menu.
- **Folios** can be used to easily manage content. With this release, when a folio is locked (either by freezing or filing in a category that prohibits edits), the folio and its content are automatically cloned, and the bundle is locked, thus preventing the folio from being edited.
- **Related content links** can now be created for items on the content checkin page.

1.3.1 Conceptual Changes in this Product

In previous releases of this product, the term 'record' was used to designate those items of content which could not be revisioned. Therefore, a designation was made between 'content' and 'records'.

In this release, any item of content can be revisioned if revisioning is allowed. One of the initial setup choices is to allow revisions or to prohibit revisions of content. You can now finely tune which categories, folders, and content are revisionable, editable, or which can be deleted. Content, categories, and folders are no longer designated as 'record categories' or 'record folders'.

1.3.2 Documentation Changes in this Product

The documentation set for this product has been substantially revised to reflect new functionality and changes.

In addition, several task descriptions have been moved from the administrative guides. Any task which can be performed by either a user or a privileged user (administrator or user with other administrative privileges) is now documented in this guide (the *Oracle Fusion Middleware User's Guide for Universal Records Management*).

1.4 Using Help

In addition to the guides provided with the product, information about product functionality is available with context-sensitive tooltips, quick help, and the help menu.

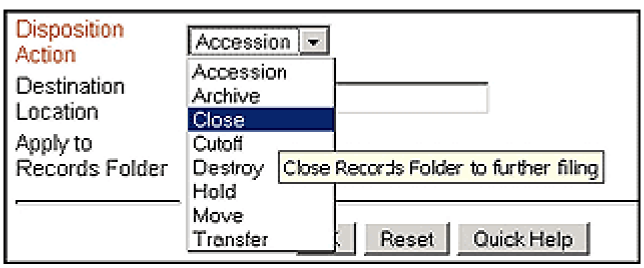
1.4.1 Tooltips

If the mouse cursor is held over a field label in a web browser, context-sensitive information on the field label is displayed. A question mark is displayed then the tooltip appears.

Figure 1–1 Field Label Tooltip

When using Netscape or Firefox as a web browser, tooltips are also available for items in options lists, provided the list items are not custom entries.

Figure 1–2 Option List Item Tooltip (Only Supported by Netscape and Mozilla Browsers)



1.4.2 Quick Help

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

2

Introduction to Records and Retention Management

This section covers the following topics:

2.1 Management of Retained Items

Oracle URM effectively manages content items on a retention schedule. The focus of *records management* tends to be the preservation of content for historical, legal, or archival purposes while also performing retention management functions.

Oracle URM combines both record and retention management into one software system. Oracle URM can track and to preserve content as needed, or dispose of content when it is no longer required.

The focus of *retention management* tends to be the scheduled elimination of content based on a schedule designed by a record administrator.

This section covers the following topics:

2.1.1 Needs for Retention

There are various reasons why organizations may need to retain content:

2.1.1.1 Regulatory Needs

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

- 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/health care industry: HIPAA, FDA regulations
- Financial services: SEC Rule 17a
- Telecommunications industry: 47 CFR 42, and so on

2.1.1.2 Litigation Needs

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

- Policy-based retention of content:
  - Retain information needed for litigation (for example, a contract and any communication relating to it).
  - Centralized searching and retrieval of that information
- Systematic disposition of eligible content:
  - Less material to search through during discovery
  - Less material to give to opposing counsel
- Suspend/freeze disposition of content relating to pending litigation:
  - Avoid appearance of cover-up and possible liability when content relating to pending litigation is destroyed.

2.1.1.3 Business Needs

There may be business-related needs for effective and efficient retention 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, and so on
  - 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 they are useful to the business.

Oracle URM manages all content, regardless of source, in a single, consistent, manageable infrastructure.

2.1.2 What Do I Retain?

Items for retention are any form of information, both physical and electronic, that is **important** enough for an organization so they must be **retained** for a specific period and may be **disposed** of when no longer needed. However, it can be revisioned, retained and can be managed on a disposition schedule.An organization may choose to manage content to eliminate outdated and misleading information and track documents related to legal proceedings.

This can include the following types of items:

- DoD 5015 record: As defined previously 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."

  In this documentation, the term "content" is synonymous with "record" and includes those items which can be tracked for DoD purposes.

- Business content: As defined above with the stipulation that it is used in the transaction of public business.
- Content items: As defined above with no additional governmental or public business criteria. An organization may choose to manage content to eliminate outdated and misleading information, track documents related to legal proceedings, and manage storage resources.

See the following sections for more information:

- "Importance of Content" on page 2-4
- "Retention" on page 2-4
- "Disposal" on page 2-4

2.1.2.1 Content Retention Qualities

Content retention qualities include:

- **Benefits**: A benefit of content retention 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**: Content can be checked out, modified, and checked back in to create multiple revisions and tracked through the revisioning process.
- **Disposition**: Disposition schedules can be assigned to content by their location in the Retention Schedule. This defines how content should be retained and disposed of and helps eliminate outdated or superseded information, manage storage resources, or handle legal procedures.

- **Filing**: Content can be filed into record folders or into categories for easier management of groups of content.
- **Other Functionality**:
  - Classification/Supplemental Markings
  - Permanence
  - Record Folders
  - Freeze
  - Link
  - Subject to Review

2.1.2.2 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 must 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 requiring 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.

2.1.2.3 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 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 period may be based on usage if usage is being tracked.
- The retention may be based on revision (for example, after four revisions).

2.1.2.4 Disposal

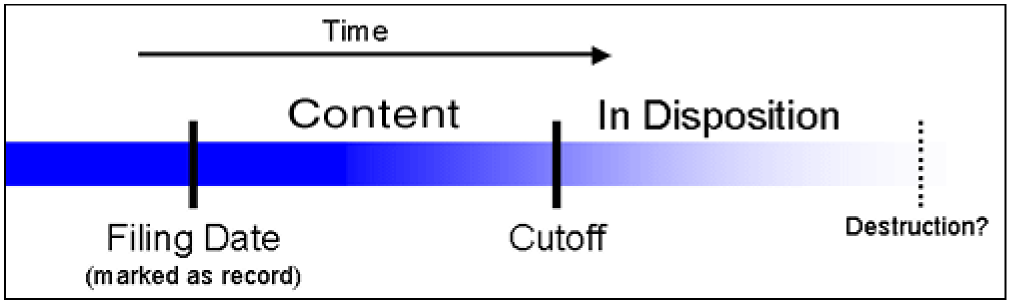
After a retention period, content items are disposed of by authorized people according to the requirements of the organization. Disposition actions can include:

- 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 content is deemed so important it will never be destroyed (for example, due to historical significance). "Disposal" in this instance indicates a status changes from active use.

2.1.3 Lifecycle for Retained Content

The lifecycle of retained content goes through several stages.

Figure 2–1 Life Cycle of Retained Content



The **filing date** is the date a content item is marked as an item being tracked. This often coincides with the check-in date. However, it is possible for an active content item already checked in to be tracked.

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

2.1.4 Types of Retained Content

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

- "Internal and External Retained Content" on page 2-5
- "Classified, Unclassified, Declassified Content" on page 2-5
- "Non-Permanent, Transfer or Accession, and Reviewed Content" on page 2-6

2.1.4.1 Internal and External Retained Content

An ***internal*** retained content item is an electronic item stored within Oracle UCM and managed by Oracle URM.

External content can also be managed. An ***external*** retained content item is a source file not stored in Oracle UCM or Oracle URM. It can be in a variety of formats, both physical or electronic. If the source file is not specifically stored in Oracle URM, then it is considered external. The software can manage the disposition schedule, search metadata associated with the external file, and manage an electronic rendition of an external file. An electronic rendition can either be checked in as a primary file of an external item, or be filed as a separate file, and then linked to the external file metadata.

2.1.4.2 Classified, Unclassified, Declassified Content

Content can be ***classified***, ***unclassified***, or ***declassified***.

Classified content is that which requires protection against unauthorized disclosure (for example, because it contains information sensitive to the national security of the United States or because it is essential for a corporation's operation).

Unclassified content is not and has never been classified.

Declassified content was formerly classified, but that classified status has been lifted.

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

Options can be chosen during the initial setup to insure that the system complies with the DoD 5015.2 standard (including Chapter 4). The software has been certified by the Joint Interoperability Test Command (JITC) to comply with that standard. 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.

2.1.4.3 Non-Permanent, Transfer or Accession, and Reviewed Content

For disposition purposes, content is categorized into **non-permanent**, **transfer or accession to NARA**, and **subject to review**. Most items fall into the non-permanent category.

Non-permanent items are usually destroyed after a retention period. Permanent items are deemed important for continued preservation and are retained indefinitely (for example, because of their historical significance).

Items can be scheduled for periodic reviews by authorized people. This complies with the DoD Vital Record Review criteria.

2.2 Basic Retention Management Concepts

Oracle URM is used to manage content, regardless of source or format, in a single, consistent, manageable infrastructure. Managed items are assigned retention schedules and disposition rules which are used to schedule lifecycles for content to eliminate outdated or superseded information, manage storage resources, or comply with legal audit holds.

Content and its associated metadata are stored in retention schedules, which are hierarchies with categories that define disposition instructions. 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 an organization.

Disposition schedules of content in the repository can also be managed, enabling the scheduling of lifecycles for content to eliminate outdated or superseded information, manage storage resources, or comply with legal audit holds.

The following concepts are important to understand in the context of retention management:

- **record administrator**: individuals in the organization who are responsible for setting up and maintaining the retention schedule and other aspects of the management system.
- **record user**: individuals who use the software to check content in and out of the system, to search for records, and to perform other non-administrative tasks.
- **record officer**: individuals who have limited administrative responsibility in addition to the responsibilities of a record user.

- **administrator**: individuals who may maintain the computer system, network, or software at the site where the management system is in place.
- The **retention schedule** is an organized hierarchy of series, categories, and record folders, which allows users to cluster retained content into similar groups, each with its own retention and disposition characteristics.
- A **series** is an organizational construct in the retention schedule which assists in organizing categories into functional groups. Series are normally static and are used at a high level in an organization hierarchy. They can be especially useful if a large amount of categories are used. A series can be nested, which means a series may contain other series.
- A **retention category** is a set of security settings and disposition instructions in the retention schedule hierarchy, below a series. It is not an organization construct but rather a way to group items with the same dispositions. A category helps organize record folders and content into groups with the same retention and disposition characteristics. A retention category may contain one or more record folders or 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.
- A **record folder** is a collection of similar content items in the retention schedule. Folders enable content to be organized into groups. A folder typically follows the security settings and disposition rules associated with its assigned retention category. Folders can be nested, which means a folder may contain other folders.
- **Disposition** is the collective set of actions taken on items. Disposition actions include wait times and activities such as transfer to external storage facilities, the destruction of temporary content, deletion of previous revisions, and deletion of all revisions.
- A **disposition instruction** is created within a retention category, and typically consists of one or more disposition rules, which define how content is handled and what actions should be taken (for example, when and how content should be disposed of).
- A **period** is the segment of time that must pass before a review or disposition action can be performed. Several built-in periods are provided (for example, "one year"), but custom periods can be created to meet unique business needs.
- A **trigger** is an event that must occur before a disposition instruction is processed. Triggers are associated with disposition rules for retention categories. Examples of triggering events include changes in status, the completed processing of a preceding disposition action, or a retention period cutoff.
- A **link** is a defined relationship between items. This may be useful when items are related and need to be processed together. Links are available for items stored both in and out of the retention schedule.
- A **classification** specifies the security level of a classified item. It is used in the process of identifying and safeguarding content containing sensitive information. Typical classification levels are "Top Secret,", "Secret," and "Confidential," and "Unclassified."
- A **classification guide** is a mechanism used to define default values for several classification-related metadata fields on the content check-in pages for content. A guide enables convenient implementation of multiple classification schemes.
- **Freezing** inhibits disposition processing for an item. Frozen content cannot be altered in any way nor can it be deleted or destroyed. This may be necessary to

comply with legal or audit requirements (for example, because of litigation). Freezing is available for items stored both in and out of the retention schedule.

- **External items** are those which are not searched and processed in the same fashion as retained content. External content usually refers to content managed by Physical Content Management or managed by an adapter (an add-on product to Oracle URM).
- **Federation, Federated Search, Federated Freeze** are functionality used to manage the process of legal discovery. Using Federated Search or Freeze, a legal officer can search content across all repositories to gather information needed for legal proceedings.

2.3 Physical Content Management

While Oracle URM enables organizations to manage the retention and disposition of content, Physical Content Management provides the capability of managing physical content that is not stored in the repository in electronic form.

All items, internal and external regardless of their source or format, are managed in a single, consistent, manageable infrastructure using one central application and a single user interface. The same retention schedules are used for both electronic (internal) and physical (external) content.

PCM tracks the storage locations and retention schedules of the physical content. The functionality provides the following main features:

- **Space management**, including definition of warehouse layout, searching for empty space, reserving space, and tracking occupied and available space.
- **Circulation services**, including handling reservation requests for items, checking out items, and maintaining a due date for checked-out items.
- **Chargeback services**, including invoicing, for the use of storage facilities and/or actions performed on physical items.
- **Barcode file processing**, including uploading barcode information directly into the system, or processing barcode files manually.
- **Label creation and printing**, including labels for users, storage locations, or individual physical items.
- **Retention management**, including periodic reviews, freezes and litigation holds, and e-mail notifications for pending events.

2.4 Interaction with Oracle UCM

The following layouts and search templates are supported. Users can change layouts and templates by setting them in their user profile):

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

The Classic layout or the Classic View search template are not supported. This guide assumes you are using the Trays layout.

2.5 Basic Retention Processes

The following steps outline the basic workflow of retained content:

1. The retention schedule and any required components, such as triggers, periods, classifications, and custom security or metadata fields are created.
2. 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 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 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 Retention Assignments links within the 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 on the pending dispositions approval page. This is a manual process.

Many disposition schedules are **time-based** according to a predictable schedule. For example, content is often filed then destroyed after a certain number of years. The system tracks when the affected content is due for action. Notification email is sent to reviwers with links to the pages where reviewers can review and approve content and folders that are due for dispositions.

In contrast, **time-event** and **event-based** dispositions must be triggered with a non-system-derived trigger (a trigger that was defined for a particular scenario). For example, when a pending legal case starts litigation, the Records Administrator must enable the custom trigger and set its activation date because the start date information is external. Custom triggers can define event and time-event based disposition actions based on the occurrence of a particular event.

3 Interface Overview

This chapter describes the key elements of the product interface. It covers the following topics:

3.1 Main Menus, Table Menus, Page Menus, Action Menus

This product has four main menu locations where product functionality can be accessed. Note that this product is highly configurable, so the options seen on any menu may vary depending on what items have been enabled.

The following four primary menu locations are available:

- **Top menu**: this menu contains a **Records** option as well as a **Physical** option (if Physical Content Management is enabled). This menu can be used to quickly access different parts of the Oracle URM and Physical Content Management product.
- **Page Action menu** or **Page menu**: on many pages, an Action menu (a small box with horizontal lines in it) appears at the top of the page. Options in this menu pertain to the items at that level in the hierarchy. For example, an Action menu appears on the Exploring Retention Schedule page. At that level of the product hierarchy, reports about the retention schedules can be created.
- **Table menu**: on most pages which list items (triggers, retention categories, content items) a menu appears at the top of the listing. By checking a box next to an item, multiple items can be affected at one time. For example, on an Exploring Retention Category page, options appear above the listing of items in that category.
- **Individual Action menus**: items listed on a page will often have an individual Action menu. The options on these menus vary depending on the item and its location in the retention hierarchy.

  The following list summarizes the most commonly seen individual Action menu options:

- **Information**: displays a submenu used to access information pages for folders, life cycle of the item, recent reviews, metadata history, and retention schedule reports.
- **Edit**: provides quick links to edit pages for folders or reviews, and options to alter an item's status by moving, closing, freezing, or unfreezing an item.
- **Set Dates**: provides quick links to actions associated with dates, such as marking items for review, canceling, rescinding, and expiring items.
- **Delete**: provides options to delete the item or perform a recursive delete (delete an entire tree if multiple items are checked).
- **Create**: provides options to create items appropriate to the location in the hierarchy. For example, if this is the Action menu for a retention category, Create suboptions include Series and Retention Category.

3.1.1 Interaction with Desktop Integration Suite

Desktop Integration Suite (DIS) is a set of applications that integrates the desktop experience with Oracle UCM, Oracle Content Database, and other WebDAV-based content repositories. DIS provides a simplified interface for managing files in a unified way from all familiar desktop applications.

DIS is not discussed in detail in this documentation but in the *Oracle Fusion Middleware User's Guide for Desktop Integration Suite.* Mention is made throughout this documentation to indicate those actions which can be taken using DIS.

3.2 Dashboards

Dashboards can be created to allow immediate access to frequently used aspects of the software. Each dashboard is composed of panes which hold different types of functionality, such as search boxes, lists of information, or access to other web sites. The dashboard can be customized so frequently performed tasks, such as pending reviews, pending approvals, and so on, are easily accessible.

Default dashboards are provided. To access this functionality, click **Records** then **Dashboards** from the Top menu. Click **User** to access the user dashboard. If you are assigned administrative privileges, another dashboard is available. To view it, click **Admin**.

Create a new dashboard by selecting elements for it or edit the default dashboard. See "Editing a Default Dashboard" on page 3-3 and "Creating or Editing a Personal Dashboard" on page 3-3 for details.

3.2.1 Using Dashboards

Follow this procedure to select a dashboard for use:

1. Click **Records** then **Dashboards** from the Top menu. A list of current dashboards is displayed.
2. Select the dashboard to use from the list. The User Dashboard Page or the customized dashboard is displayed.
3. To use the dashboard as a home page at login, click **Actions** then **Set as Home Page**. To remove the dashboard as the home page, click the user name in the top right corner of the display. The My Profile page is displayed. Click the **Remove Dashboard Home Page** box.

3.2.2 Editing a Default Dashboard

Use this procedure to edit the default dashboards or other personal dashboards:

1. Click **Records** then **Dashboards** from the Top menu. Click the dashboard to edit.

   The User or Administrative dashboard is displayed.

2. Click **Save As** from the Actions menu. The default dashboard must be saved under a new name before it can be edited. A dialog opens. Enter a new dashboard name and a dashboard title. Click **OK** when done.

3. The dashboard is displayed in edit mode.

   - To move a pane from one location to another, put the cursor on the border of the pane. Hold down the left mouse button and drag the pane to another location.
   - To delete a pane, click the X in the upper corner of the pane.
   - To set individual options for each pane, click the Options menu in the upper corner of the pane. Note that not all panes have an option list.
   - To replace a pane, first delete the pane. An empty pane is displayed. Click **Other Dashboards** to populate the search list. The Search for Items dialog opens. Use this search form to find panes to use in the dashboard.

     Select metadata fields for searching or click the **Search** button to search the entire database.

     The Dashboard Results Page is displayed, showing those items that can be used in the dashboard.

     Click the box next to the items to include and click **Next**. The Select Dashboard list is populated with the items that were selected. Click an item from the list to include in the pane and click **OK**.

4. When done, click **Save Changes** or **Save As** from the Actions menu to save the dashboard under a new name.

3.2.3 Creating or Editing a Personal Dashboard

Follow this procedure to create a personal dashboard:

1. Click **Records** then **Dashboards** then **Create New** from the Top menu. Or click **New Dashboard** from the **Content Management** main menu.

   The Create/Edit Dashboard Page is displayed.

2. Choose the number of columns to appear on the dashboard by clicking a number from the list.

3. In the first pane, click **Other Dashboards** to populate the list of dashboards for use.

   The Search for Items dialog opens. Use this search form to find panes to use in the dashboard. Select metadata fields for searching or click the **Search** button to search the entire database.

4. The Dashboard Results Page is displayed, showing those items that can be used in the dashboard.

5. Click the box next to the items to include and click **Next**. The Select Dashboard list is populated with the selected items.

6. Select an item from the list for the pane and click **Ok**. Repeat this process for the other panes in the other columns. To delete a pane click the **X** in the corner of the pane window.
7. When done selecting panes for use, click **Actions** then **Save Dashboard**.
8. To use a Simple Profile to associate with the dashboard, select it from the list. Click **Next** when done.
9. A checkin page is displayed. Enter the necessary metadata to save the dashboard. Click **Checkin** when done.

3.3 My Favorites

Users can create a listing, similar to bookmarked browser "Favorites" and add series, categories, folders, reports, report templates, users, and aliases to this listing. Users with administrative privileges can add other objects such as freezes to the listing.

If an item can be added to a Favorites listing, the **Add to Favorites** menu option is displayed on a page. To add items to these lists, select the box next to an item and click **Add to Favorites**.

Favorites can be shared with other users. To make a Favorites list available for sharing, click the user name in the top right corner of the screen. The My Profile page is displayed. Click **Yes** in the **Share RMA Favorites** box. Click **Update** when done. The Favorites list will then be available to other users to select from.

To share an item in that list, click the checkbox for the item then click **Sharing** and **Share** from the Table menu. To prevent sharing, click **Sharing** then **Unshare**.

To add a favorite from another user, click **Records** then **Favorites** from the Top menu. If a favorite list is available from another user, the **Import From User** table option is available in the list of favorites. Click the **Import From User** option and select the name of a user from the list. All of that user’s favorites for that particular Favorite type (for example, a Series or a Category) appear on the Favorites list.

Sharing favorite items is based on assigned rights. If a user does not have rights to share items then the **Import From User** option does not appear on that user’s My Favorite list. For example, if you do not have the category.freeze, folder.freeze, or record.freeze right, you cannot access favorite freezes from other users.

To view items in the Favorites list, click **Records** then **Favorites** from the top menu. The My Favorites Screen is displayed. Click on the indicated tabs to quickly find the favorites of a specific type (for example, Categories or Series).

Use the Up Arrow or Down Arrow buttons on the My Favorites Page to rearrange the favorites in the list. The reordering in the list is not saved until the **Save Now** button is clicked, which appears when reordering begins.

Favorites items are used to populate option lists, such as when creating freezes or when checking in content. For example, if an item is on a Favorites list, it appears on the pulldown list when a freeze name is selected or when a category is selected during content checkin. This helps to narrow down the choices on large option lists.

3.4 Icons

Several icons are used to indicate the type of content and other objects. This section describes some of the default icons used with Oracle URM. These icons can be customized, so the icons used in this documentation may differ from the ones at your site.

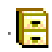
If the classification scheme hierarchy for MoReq2 (Model Requirements for the Management of Electronic Records) is enabled, additional icons are used which differ slightly than those shown here.

3.4.1 Retention Schedule Objects

The following objects are used in retention schedules.

A retention series is indicated in the Browse Content interface by a file cabinet with the drawers closed:

Figure 3–1 Retention Series Icon



When a series is in use, the icon is altered to appear as though a file drawer is open:

Figure 3–2 Series in Use Icon

A hidden series icon appears as a more transparent image of a file cabinet:

Figure 3–3 Hidden Series Icon

A record folder is indicated by a document superimposed on a folder icon:

Figure 3–4 Record Folder Icon

A closed record folder is indicated by a closed lock superimposed on a folder icon:

Figure 3–5 CLosed Record Folder Icon

A category is indicated by a calendar superimposed on a folder icon:

Figure 3–6 Retention Category Icon

A shared Favorites object is indicated by a blue icon of a user superimposed on a document icon:

Figure 3–7 Shared Favorites Icon

Items that are no longer the most current version (due to revision changes, obsolescence, or other means) appears as a crossed-out name.

Figure 3–8 Not Current Indicator

A volume appears as a folder with a closed book adjacent to it:

Figure 3–9 Volume Icon

A closed volume appears as a folder with a closed book and a lock icon adjacent to it:

Figure 3–10 Closed Volume Icon

Frozen content is indicated with the addition of two blue vertical bars next to the object name:

Figure 3–11 Frozen Content Icon

A fixed clone is designated by a document icon with a calendar superimposed on the icon.

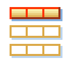
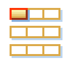
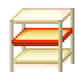
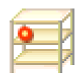
Figure 3–12 Fixed Clone Icon

A frozen fixed clone is designated by a combination of the fixed clone icon (a document icon with a calendar) and a frozen icon (two vertical bars).

Figure 3–13 Frozen Fixed Clone Icon

3.4.2 Predefined Location Types (PCM)

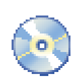
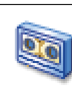
The out-of-the-box Physical Content Management feature comes with the following six predefined location types (in hierarchical order), with their standard icons for the default Trays layout:

Predefined Location Types	Icon (large)	Allows Storage of Content (Default)
Warehouse		No
Room		No
Row		No
Bay		No
Shelf		No
Position		Yes

These are the default settings, which can be modified. These predefined location types are hierarchical: a warehouse consists of one or more rooms, a room consists of one or more rows, a row consists of one or more bays, and so on.

3.4.3 Content Basket Thumbnails

Every item in the content basket has a thumbnail icon that identifies its type:

Item Type	Thumbnail
Internal (electronic) items managed by Oracle UCM or Oracle URM	Icon associated with the item's specified content type
External item managed by PCM of item type "Box"	
External item managed by PCM of item type "Document"	
External item managed by PCM of item type "Folder"	
External item managed by PCM of item type "Micro"	
External item managed by PCM of item type "Optical"	
External item managed by PCM of item type "Tape"	
External item managed by PCM with no item type assigned	
All other items	

3.5 My Rights and My Roles

The Oracle URM software has several default roles, which allow users to access specific parts of the product functionality. Administrators can customize these roles by including specific rights, providing a fine level of access to tasks and screens.

The following list describes default predefined roles. Consult your administrator to see what additional roles may be in use at your site:

- **rma** (denoted as "Records User" in this documentation): This role is generally assigned to basic users and allows them to perform basic management tasks.
- **rmalocalrecordsofficer** (denoted by "Records Officer" in this documentation): This role is generally assigned to "privileged" users, who have all the permissions assigned to basic users (‘rma’ role) but are also granted rights to perform additional functions.
- **rmaadmin** (denoted by "Records Administrator" in this documentation): This role is generally assigned to administrators who are responsible for setting up and maintaining the management infrastructure and environment. These users have the widest range of rights to perform management tasks.
- **pcmrequestor** (denoted by "PCM Requestor" in this documentation): This role is generally assigned to users who have all the permissions assigned to basic users without a Physical Content Management role but are also granted additional rights to perform some functions not allowed for basic users.
- **pcmadmin** (denoted by "PCM Administrator" in this documentation): This role is generally assigned to administrators who are responsible for setting up and maintaining the physical content management infrastructure and environment.

Each of these predefined roles comes with a default set of permissions and rights, but these can be modified. New roles with assigned management rights can also be created.

To view assigned roles and rights, click the user name in the top right portion of the screen. The My Profile page is displayed. The roles assigned to the logged-in user are displayed at the top of the My Profile information.

To see rights assigned, click **Records** then **Rights** from the Top menu. . The Assigned Rights Page is displayed. This screen shows the rights assigned to the current user for the enabled components. To view details about each component, click the **Show** link for that component. To view details about all rights, click the **Show All Rights** link at the top of the screen. To hide rights again, click the **Hide** link in the component section or at the top of the screen.

3.6 Profiles

Profiles can be created to customize the check-in page and the search page. By using profiles, only those items needed for particular check-in tasks are displayed, for example, and other fields that are not needed are ’hidden’.

Users and administrators can create profiles. Users can create profiles for personal use, while administrators can create global profiles that can be used by a variety of users with different roles.

Details about creating and using profiles are discussed in Chapter 13, "Using Simple Profiles".

3.7 Menus

After installation, the Search and Checkin menus are changed to include default profile pages. These profiles provide a filtered view of checkin and search pages, to customize what users will see. Additional options may appear depending on profiles created at your site and the choices made during installation.

Menu options can be used to help quickly narrow down searches and choose the type of checkin to perform. The Screening option on the Search menu is dependent on security rights assigned to the user.

When viewing search results, a query menu is added to the search results page. The options on this menu help narrow a search by selecting new fields from those already selected, or to save the search under a file name for use later. See the *Oracle Fusion Middleware User's Guide for Content Server* for more details about searching and saving query results.

4

Browsing Retention Schedules and Storage

This chapter covers the following topics:

4.1 Retention Schedules

A retention schedule is an organized hierarchy of series, categories, and folders that clusters retained items into similar groups, each with its own retention and disposition characteristics. There can be as many retention schedules as necessary for the requirements mandated by an organization. Retention schedules are set up to make it easy to accurately manage retained items.

When a retained item is filed into a retention schedule, the disposition of the retained item is determined by the category into which it is filed. Security access and status of the retained item (such as if the retained item is subject to review, or whether the record is permanent) is determined by the category or folder into which the record is filed.

If the retained item should not inherit the security and status of the category or folder, but be filed in a specific location, the security or status can be changed during or after filing.

This section covers the following topics:

4.1.1 Retention Schedule Hierarchy

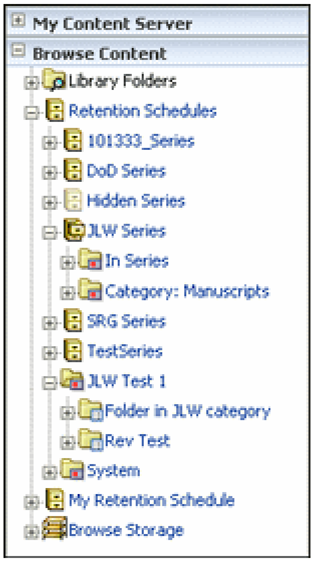
A typical hierarchy of a retention schedule consists of series, categories, and/or record folders.

- Series are optional and can be used to organize retained content. A series cannot contain content items but can contain categories or other series, which can contain content.
- A category define the disposition instructions of the retained items and any folders it contains.

  Categories can be created within a series, but a category cannot be contained within another category because the disposition rules for each category may conflict.

- Folders can be created within a category or another folder, but not a series.
- Content can be filed into a category or folder.

Figure 4–1 Basic retention schedule



4.1.2 Browsing the Retention Schedule

Browsing content and navigating the hierarchy in the retention schedule can be done using various techniques. A user's permissions and security configuration determine what portions of the schedule the user can view. A user can navigate by:

- Accessing retention schedules using the Browse Content menu: When an object is clicked in the Browse Content area in Content Server, the tree expands or collapses. By default, retained items can be accessed in the retention schedule object.
- Accessing retention schedules using a search result: Click the link in the Name column on a search results page to navigate to child objects. Hover the mouse pointer over the name of a category or record folder to quickly view its description. Descriptions over 100 characters are truncated in the popup for easier viewing within the screen. The full description of a category or folder can be viewed on the relevant information page.
- Accessing retention schedules using locator links: The locator link provides a convenient means of navigating a retention schedule. It shows the location in the schedule hierarchy, and provides links to click to quickly move between parent and child levels.

Use this procedure to view the contents of a retention object (a category or series):

1. Click **Browse Content** then **Retention Schedules**.

   The Exploring Retention Schedules Page is displayed.
2. Click the name of the object to view.
3. The appropriate object page is displayed. For example, if you elect to view the contents of a category, the Category or Series Content Page is displayed.

Use this procedure to view information about a series or retention categories:

1. Click **Browse Content** then **Retention Schedules**.

   The Exploring Retention Schedules Page is displayed.

2. Navigate to the item for which to see information.

3. In the row for the item, do either of the following:

   - Click the **Info** icon.
   - Click the item's **Actions** menu and click **Information**, then select the type of information to view:
     - **Series**: display information about a series
     - **Category**: display information about a category
     - **Metadata History**: display a list of changes to the metadata of the item
     - **Disposition Information**: display the disposition instructions, defining how items in the category are handled

   The appropriate information page is displayed (for example, the Series Information Page or the Category Information Page). The page shows relevant information about the selected item.

4.1.2.1 Browsing Using DIS

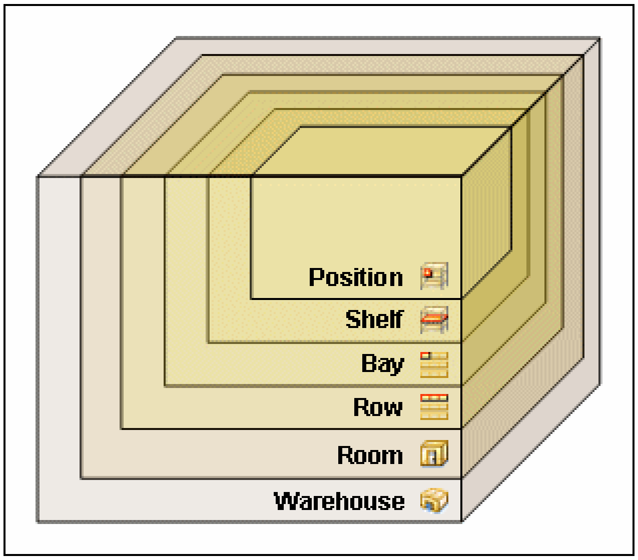
If Desktop Integration Suite is installed, a user can browse for content by clicking the Browse icon in the Search panel of the Windows Explorer pane.

4.2 Browsing the PCM Storage Space

PCM uses a defined physical space environment to keep track of the storage and retention of physical items. When working with a physical item, the item is assigned to a storage location, so PCM knows where it is stored and can track it.

Storage space in PCM is set up hierarchically. Storage locations contain other, smaller storage locations which contain still smaller storage locations, and so on. The out-of-the-box PCM functionality comes with the following storage space hierarchy (from large to small):

Figure 4–2 Default Storage Space Hierarchy



This section describes browsing the defined storage environment in PCM. It covers the following topics:

- "Browsing the Storage Tree" on page 4-4
- "Using Exploring Pages" on page 4-5
- "Viewing Information About a Storage Location" on page 4-5
- "Reserving or Canceling a Storage Location" on page 4-5

4.2.1 Browsing the Storage Tree

The Browse Content menu contains an item called **Storage**. This option enables a user to browse the defined storage space environment in a tree view with all defined storage locations in their hierarchical order. Note the following considerations:

- The icons indicate the location type of the storage locations.
- All storage locations include a percentage that shows how much of the available storage space in the location (and all its children) is currently occupied. For example, 25% means one-quarter of the maximum allowed number of stored items is currently assigned to the storage location (and all its children). The percentage of a storage location is automatically updated. However, the percentages of the parent storage location(s) are not updated automatically. This is done automatically daily (see next note).
- By default, the available storage space for the entire hierarchy is recalculated daily at midnight. Therefore, the displayed storage availability information may not be entirely up to date as the day progresses because it still reflects the situation from the night before.
- The Browse Storage tree will always include a storage location called "Other" at the bottom. This is the default storage location for any physical items not explicitly assigned to another storage location.
- Click any linked item in the storage space tree to see its Location Page (see "Using Exploring Pages" on page 4-5).

4.2.2 Using Exploring Pages

The Exploring "[Location]" pages show the child storage location of a defined storage location. A list of all physical items stored in it can also be displayed.

1. Click **Browse Content** then **Storage**.
2. The Exploring Page for the top level (called "Storage") is displayed. YUse the links on this page to drill down in the storage space hierarchy. In the default Trays layout, navigate to a storage location in the tree view and click its link in the tree.

At the top of the page are locator links showing the current location in the storage space hierarchy. This trail allows a user to easily navigate between the levels in the hierarchy. Click any linked item in the trail to go to that level and show its Exploring page.

4.2.3 Viewing Information About a Storage Location

To view information about a storage location, complete the following steps:

1. Click **Browse Content** then **Storage**.

   The Location Page for the top level of the storage hierarchy is displayed.
2. Navigate to the storage location and click the **Info** icon.

   You can also choose **Information** then **Storage** from the Actions menu for a storage location in the list to view that location's properties.

   The Storage Information Page is displayed listing the current storage location properties.
3. Click **OK** when done.

   The original Location Page is displayed again.

4.2.4 Reserving or Canceling a Storage Location

Use this procedure to reserve a location for future storage or to cancel a current reservation. Reservations are useful to group similar items to store together as they are checked in. If a storage location is reserved, all its child locations are also reserved.

To reserve a storage location, complete the following steps:

1. Click **Browse Content** then **Storage**.

   The Location Page for the top level of the storage hierarchy is displayed.
2. Navigate to the storage space level including the storage location to reserve.
3. Choose **Edit** then **Reserve Storage** on the **Actions** menu for the storage location.
4. The Select Requestor dialog opens. Accept the default or choose a new name from the list. Click **OK** when finished.

The original Location Page is displayed again, and the storage location now shows "Reserved" in its status column, with the name of the user who made the reservation in parentheses.

To cancel the reserved status of a storage location, complete the following steps:

1. Click **Browse Content** then **Browse Storage**.

   The Location Page for the top level of the storage hierarchy is displayed.

2. Navigate to the storage space level that includes the storage location whose reserved is to be canceled.
3. Choose **Edit** then **Cancel Request** from the **Actions** menu for the storage location.

The original Location Page is displayed again, and the storage location no longer shows "Reserved" in its status column.

4.3 Generating a Retention Schedule Report

Use this procedure to generate retention schedule reports for retained items. A report can be generated at any time for any portion of the retention schedule to which a user has permissions.

To generate a report, complete the following steps:

1. Click **Browse Content** then **Retention Schedules**.

   The Exploring Series "Retention Schedules" Page is displayed.
2. Check the box corresponding to the item to use for the report. Click **Reports** then **Retention Schedule** on the Page menu.

   A retention schedule report is generated. Open the report and display it or choose to save the report as a file.
3. Close the browser window when done.

Note: The report is generated in either PDF or HTML form, depending on how the system is configured. If the generated file is in PDF format, it must be viewed using Adobe Acrobat version 6.0 or later.

---

5 Creating Content for Retention

Content can be created from the main menu, from within retention schedules, or existing content can be marked within Oracle UCM as usable for retention.

For example, if you work with Oracle UCM to manage content outside of a retention schedule, you can file content into a retention schedule without moving outside of Oracle UCM. You do this by accessing the content check-in form from the main menu.

If you work mostly within retention schedules and are within a schedule hierarchy, you can create the content item at your current position in the hierarchy by choosing **Check in New Content Item** from the Action menu for the retention object.

For information about checking in physical content, see Chapter 8, "Managing Physical Content".

This section describes these topics:

Important: The fields displayed on the check-in pages are dependent on the profiles used for the check-in as well as options and the rights and roles assigned to a user.

For example, unless a user is assigned a supplemental marking, no markings appear on the pulldown list of supplemental markings that can be used at checkin.

5.1 Checking In From the Main Menu

This section describes how to check in content from the main menu.

If profiles have been created by the administrator, those profiles appear on the New Check In menu. A profile 'hides' fields so only those fields essential for check-in are displayed. This makes the process faster and less prone to error.

Important: The fields displayed on the check-in pages are dependent on the profiles used for the check-in and the configuration of the system. See the Records Administrator for details about what triggers are used for profiles and what fields are to be expected on the check-in pages.

Use this procedure to check in new content. Content can be checked into a category or a record folder.

Tip: Use this method of filing content items when filing items to disparate locations and to navigate to a different location within the retention schedule with each check-in.

1. Click **New Check In** from the Top menu. If profiles have been created, there may be several different options available. Select the profile or type of checkin to do.

   The applicable page is displayed.

2. Enter optional information pertinent to the item.
3. If an auxiliary metadata set has been created, click that option in the top right corner of the screen. Additional metadata fields appear containing information for the item.
4. To associate the item with a category or folder, click **Browse** next to the **Category or Folders** field at the bottom of the page.

   The Select Category or Folder Dialog is displayed.

5. Choose the category or folder in which to file the item. If categories or folders were added to a My Favorites list, they appear on the pulldown list and are easily selected.

   The file path is displayed in the text field on the page.

6. Assign a supplemental marking to the item. A user must be assigned a supplemental marking in order for markings to appear on the pulldown list of supplemental markings that can be used at checkin.
7. (Optional) To create a classified record, see "Checking In a Classified Item" on page 5-4.
8. Click **Life Cycle Preview** to view the disposition actions associated with the category selected earlier.
9. After entering all the appropriate metadata values, click **Check In**.

   A confirmation page is displayed.

   For more detailed information about checking in content, see the *Oracle Fusion Middleware User's Guide for Content Server.*

5.1.1 Checking in Items Using DIS

If Desktop Integration Suite is installed, new files can be checked in from Microsoft Office by using the Copy and Paste options in the right-click menu. If an item is currently checked out, a user can check it in using the Offline Content Manager or by clicking the Check In option on the right-click menu.

To check in an existing file from Microsoft Office, click **File** then **Save** and select the server option in the Save dialog box. The content checkin form is displayed for the last instance used.

If the DoD component is enabled, files may not be able to be checked by copying and pasting or dragging and dropping them into contribution folders. When using DoD features, the Category or Folder field is required. This means an item cannot be checked in if that field is empty. The actions of copying and pasting or dragging and dropping into a contribution folder often doesn't require further user intervention, so often the checkin cannot complete successfully.

Oracle URM can be configured by an administrator to enable these types of checkins. See the *Oracle Fusion Middleware Setup Guide for Universal Records Management*

See the *Oracle Fusion Middleware User's Guide for Desktop Integration Suite* for more details.

5.2 Checking In From Within Retention Schedules

Use this procedure to create a content item from within a retention schedule by placing it directly into a category (or records folder if it is a record). The proper security privileges are required to access the category or records folder.

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 **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 locator links. To further expedite the filing process, use the **Check In Similar** feature.

---

1. Click **Browse Content** then **Retention Schedules**.

   The Exploring Series "Retention Schedules" screen is displayed.

2. Choose a Retention Category for use. From the item's **Actions** list, click **Create** then choose the type of content: Record, Folder, New Content Item, or New Physical Item.

   The appropriate check-in page is displayed.

3. (Optional) To create a classified item, see "Checking In a Classified Item" on page 5-4.

4. Click **Life Cycle Preview** to view the disposition actions associated with the category selected earlier.

5. After entering all the appropriate metadata values, click **Create**.

   A confirmation page is displayed.

6. If similar content is available to check in, click **Check In Similar** to pre-populate the form and expedite the process.

5.3 Checking In an External Item

External content is anything defined by an organization as existing outside the repository. It can be a physical item of some sort, such as a paper or microform record or it could be an electronic record stored on another server or by some other system.

Filing external content associates metadata with an item that can be searched, and establishes and tracks a disposition schedule through the category into which the item is filed. A user can also check in or link to an electronic rendition of an external item, so the external item may be edited or updated more easily in the future.

Physical Content Management can be used to track and manage metadata about external physical content.

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

1. Click **New Checkin** from the Top menu then click **Physical** (if checking in a physical item) or **Electronic/Physical** (if checking in a different type of external item). An item can also be checked in from a retention schedule by searching for a schedule then clicking **Create** then **Check in New Physical Item** from the Page menu on the Search Results Page. See "Checking In From the Main Menu" on page 5-1 or "Checking In From Within Retention Schedules" on page 5-3 for an overview of the checkin process.
2. Fields pertinent to the type of external items (location, object type, media type if it is a physical item, for example) are enabled. Specify the necessary information. When specifying the location of a physical item, select a physical location (such as room or warehouse) or specify a user as the current location (indicating the item has been checked out to that user). To do so, select the box next to **Set Current Location to a User** then select a user from the list.
3. To associate the item with a retention schedule, click **Browse** next to the **Category or Folders** field at the bottom of the page. If checking in from a retention schedule, this information is already included.

   The Select Category or Folder Dialog is displayed.
4. Choose the category or folders in which to file the item. The file pathname is displayed under the **Category or Folders** field.
5. Fill in all required metadata fields, including the **Primary File** field. If there is no primary electronic file, type any value into the field, such as **None** or **External File Only**.
6. After entering the appropriate metadata values, click **Create**.

   A confirmation page is displayed.

> **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 item 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 item at a later date.

5.4 Checking In a Classified Item

Classified items require protection against unauthorized disclosure (for example, because they contain information regarding security or insider information). Unclassified content is not and has never been classified. Declassified items were formerly classified, but the classified status has been lifted.

Classification is an optional security feature certified to comply with the Chapter 4 requirements of the DoD 5015.2 specification. A site administrator can choose whether to enable this functionality and make it available.

Important: Executive Order 12958: Classified National Security Information describes in detail the system for classifying, safeguarding, and declassifying national security information. If you are using this product to comply with that order, you should be familiar with proper classification protocols.

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

1. Access the content check-in form. See "Checking In From the Main Menu" on page 5-1 or "Checking In From Within Retention Schedules" on page 5-3 for details.
2. Enter optional information pertinent to the item.
3. To associate the item with a retention schedule, click **Browse** next to the **Category or Folders** field at the bottom of the page.

   The Select Category or Folder Dialog is displayed.
4. Choose the category or folders in which to file the item. The file pathname is displayed under the field.
5. Specify information pertinent to classifications:
   - the agency classifying the content (optional).
   - the person classifying the content. This is mandatory unless the data is derived from a specific topic, in which case it is optional.
   - what the classification is derived from. This is mandatory unless there is a specific 'classified by' person identified.
   - the topic derived from unless there is a specific person classifying the item.
   - the classification at the time of record creation. For example, Top Secret, Secret, Confidential, and so forth.
   - the type of classification. For example, military plans, foreign government information, cryptology, and so forth.
   - a declassification exemption category. For example, reveal intelligence source, reveal military plans, and so forth.
   - the event triggering the declassification of the item.
   - a date triggering the declassification of the item.
   - enable automatic declassification. If this functionality is enabled the **Is Auto Declassification Date** option appears. Check this box to allow automatic declassification of the item.
   - how the item can be downgraded. Choose date, event, or date and event.
   - an event triggering the downgrading of the item classification. This is mandatory if it was specified how the item can be downgraded.
6. After entering all the appropriate metadata values, click **Check In**.

   A confirmation page is displayed.

5.5 Folios and Cloned Content

Automatic cloning occurs when working with folios that are filed into restricted categories. A default rule in Oracle URM is followed that states all folios must be editable, revisionable, and deletable. If a folio is filed into a category that restricts any of these actions, it is cloned when a new revision is checked in.

If a folio is frozen, a clone is created because freezing restricts deletions and edits. If folio content is filed into a category that restricts edits, deletions, or revisions, it will be cloned.

You can also manually create a copy of a specific revision of a content item by cloning the item. Unlike a simple copy of a content item, a **fixed cloned copy** is linked to the original version. A newly cloned copy can also replace (supersede) any previous cloned versions. The functionality to manually create a fixed clone is only available if the `RmaEnableFixedClones` configuration variable has been set to TRUE.

When creating a fixed clone, specify which category or folder will hold the item. The clone name is created with the title of the current revision with a suffix appended. Administrators can change the value of the suffix by changing a configuration variable. See the *Oracle Fusion Middleware Setup Guide for Universal Records Management* for details.

Cloning rules can be customized to override record restrictions. This process is not discussed in this documentation. See Consulting Services for more details.

The fixed clone appears in the original content item's Revision History Section with the Fixed Clone Icon designating its status. It also appears in a separate section in the "Exploring" Page for the category or folder where the item was stored. If the clone has been frozen, the Frozen Fixed Clone Icon is displayed. Click either icon to view the Content Information Page for that clone.

A new metadata field, **Working Copy**, is added to the Information Page of the fixed clone. The name of the original content item or folio appears next to this field with a link to that item.

If a user has permissions to freeze an item (assigned to the Records Administrator role by default) the user can freeze fixed clones and freeze the revision associated with the fixed clone. Freezing is done by searching for the folio then selecting a **Freeze** option from the Table menu on the Search Results Page. See the *Oracle Fusion Middleware Setup Guide for Universal Records Management* for details.

5.5.1 Creating a Fixed Clone

Follow this procedure to create a fixed clone. Note that this menu option is only available when a content item matches the criteria for cloning:

1. Use searching or screening to find the content item to clone.
2. Click the Info icon for the item.

   The Content Information Page is displayed.
3. Select the revision to clone by clicking the revision number in the Revision History Section on the Content Information Page.
4. Click **Content Actions** then **Create Fixed Clone** from the Page menu to create a fixed clone of the revision. Choose to supersede previous clones with this version by selecting the appropriate box. A prompt appears for the clone name and the location for storage (folder or category). Enter the name of the category or click **Browse** to choose an item from the Select Category or Folder Dialog

5. Click **Ok** when done. The Content Information Page is displayed with the fixed clone icon in the Revision History Section indicating the action taken.

5.5.2 Adding a Folio to a Restricted Revision Category

Follow this procedure to create a folio that is cloned for use in a restricted revision category:

1. Click **Content Management** then **New Folio** from the Main menu.
2. Choose the type of folio to create and click **Load Folio**.
3. Click the plus icon to add a folio. Click **Next**. Select items from the search results for inclusion and click **Next**.
4. The proposed folio is displayed. Click **Actions** then **Save Folio** from the Page menu.
5. A dialog is displayed. Click **Next**. Choose a title for the folio and a security group for the folio.
6. In the Category or Folders field, choose a category that restricts revisions.
7. Click **OK** and check in the folio.
8. Browse to the category with restricted revisions.
9. Note that the folio and a folio clone are listed.

5.6 Checking In E-Mail for Retention

You can check in e-mail messages as content with the Oracle Outlook Integration functionality in Desktop Integration Suite. For complete details about checking in e-mail, see *Oracle Fusion Middleware User's Guide for Desktop Integration Suite*.

> **Important:** Checking in batch e-mail removes the mail from an inbox. Checking in an individual e-mail leaves the mail in an inbox.

This section describes these topics:

- "Using DIS to Check In an Individual E-Mail" on page 5-7
- "Checking In Correspondence From a Non-Outlook E-Mail Client" on page 5-8

5.6.1 Using DIS to Check In an Individual E-Mail

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

> **Important:** Checking in an individual e-mail leaves the mail in an Inbox. The e-mail must be manually deleted to remove it from a mailbox.

To check in an e-mail message, complete the following steps:

1. Open Microsoft Outlook or Lotus Notes e-mail client.
2. Select the messages to check in.

3. Click the **Check in Mail Item** button on the Outlook toolbar or the **Actions** and **Check In Mail Item** options on the Notes toolbar.
4. In the **Server** list, select the server into which to store e-mail content.
5. Click **Yes**. The Content Check In Form is displayed.
6. If the Correspondence area of the page is hidden, click **Show** to display the correspondence fields. Select the **Is Correspondence** box. The e-mail fields are displayed, some of which are pre-populated:
   a. Addressee(s)
   b. Other Addressees)
   c. Email Subject
   d. Email To Lists
7. Click **Check In**.

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

Use this procedure to check in correspondence as a retained item when not using 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 to select the **Is Correspondence** boxes.
4. Be sure to complete the Correspondence fields, as they are not pre-populated.

6 Searching and Screening Content

There are a variety of ways to search for content. The Search menu option on the main menu can be used to search or to screen for information. If a user has administrative privileges, the user can set up screenings to be scheduled and recurring.

If certain searches are performed on a regular basis, the search can be saved as a query for use later. Anyone, regardless of their administrative role, can create and save queries.

When using Oracle Text Search the system does not index external items, including physical items. Therefore those items and other items stored externally (for example, on an adapter system) are not available for searching.

See the *Oracle Fusion Middleware User's Guide for Content Server* for information about using the Search menu, the Quick Search field, library query folders, case-sensitivity, using wild cards, and using search operators.

For details about using Federated Search for legal discovery purposes, see the *Oracle Fusion Middleware Administrator's Guide for Universal Records Management*.

In addition to search-like functionality, screening can isolate retention categories, record folders, and content by their attributes. Screening enables a user to see what has happened or what could happen within a retention schedule.

If more results are returned than are configured in the User Profile page, the page navigation dropdown menu will change, indicating other pages of information available for viewing. The dropdown list of page numbers is updated as the user navigates through the pages. If there are fewer search results than are configured in the User Profile, no page navigation is displayed.

This chapter covers the following topics:

6.1 Searching From Content Server's Main Menu

Important: Depending on a user's role, rights associated with that role, and profile, different menu options may appear on a search or screening page. In general, system administrative users will see menus similar to those used to configure the system while end users will see menus containing typical functionality for users.

After installation, the **Search** and **Check In** menus are changed to include default profile pages. These menu options can be used to help quickly narrow searches and choose the type of search to perform.

Although the **Search** menu in the Main tray and the **Quick Search** field at the top of the screen offer convenient search options, the main search page provides the most comprehensive way to search for content.

6.1.1 Searching for Content

To search for content, follow these steps:

1. Click **Search** then the repository for searching for the Top menu.

   The Standard Search Page is displayed.

2. Enter the criteria to use for the search. When searching folders, it is best to use ’Substring’ as an operand instead of ’Matches’. Using the ’Matches’ operand narrows the search results considerably. Using ’Substring’ returns all internal content items as expected.

3. To create a query for later use, select the search criteria and click **Save**. A prompt appears for a query name. Enter a name and click **OK**. The query is saved in the user’s My Saved Query list in the **My Content Server** menu.

4. To run the search immediately, specify the search criteria and click **Search** when done.

   The Search Results Page is displayed, which lists all items meeting the search criteria.

6.1.1.1 Using the Search Forms Option

An expanded version of the search form can also be used or a custom search query can be constructed. To access these options, click **Search Forms** from the Page menu of the Standard Search Page.

- **Expanded form**: By default, several sections of each search form are displayed using the collapsed format (for example, Correspondence Fields). When the expanded version of a search form is selected, all of the sections on the form are displayed in the expanded format.

- **Query builder**: The Query Builder form is available from the Search Forms drop-down menu at the top of the page on any of the search pages. It enables a user to easily build and save complex queries by selecting options from a series of lists and operator fields. After a query is built using the Query Builder from, the user can edit the query directly, perform the search, or save the query for easy access from the saved queries list or through a targeted quick search.

  The Query Builder form displays the **Include Child Records Folders** box. If selected, the search function returns any matching results within child record folders. For comprehensive information about the Query Builder form, see the *Oracle Fusion Middleware User’s Guide for Content Server*.

6.1.1.2 Using Auxiliary Metadata Sets

If an auxiliary metadata set has been created, the **Auxiliary Metadata Set** option appears next to the **Search Forms** option on the page menu.

To search using metadata from that auxiliary set, click **Auxiliary Metadata Set** then click the name of the set before performing a search. Click **OK**. The search page is populated with the additional metadata fields, which can then be used for searching.

6.1.2 Search Result Options

When viewing search results, the search can be saved under a file name for later use. See the *Oracle Fusion Middleware User's Guide for Content Server* for more details about searching and saving query results.

The following options appear on the Table menu above the search result listing. To perform actions for multiple items, click the check box for the items then choose an option from one of the following menus:

- **Actions**: used to move the item to a content basket or folio
- **Edit**: used to perform freezes or to unfreeze an item
- **Set Dates**: used to mark items as reviewed, expired, and so on
- **Create Reports**: used to create reports for items or for search results
- **Delete**: used to remove items
- **Metadata History**: used to view the metadata history of an item
- **Change view**: used to change how the search results are displayed
- **Query Actions**: used to save the search for later use

6.1.3 Searching for Physical Content

Physical content metadata (including storage information and retention schedules, if any) are stored in the repository. Information about physical items managed by PCM can be found using the basic search page or the advanced search page.

To search for physical items, complete the following steps:

1. Click **Search** then **Physical**.

   The Search Physical Items Page is displayed.

   To use the advanced search page, click **Search** and then **Advanced Search** on Page menu.

2. To create a query for later use, select the search criteria and click **Save**. A prompt appears for a query name. Enter a name and click **OK**. The query is saved in the user's My Saved Query list in the **My Content Server** menu.

3. To run the search immediately, specify the search criteria and click **Search** when done.

   The Physical Search Results Page is displayed, which lists all items meeting the search criteria.

6.1.4 Searching Using Desktop Integration Suite

If DIS is installed, the standard search page can be accessed by clicking the Search icon in the Windows Explorer panel.

Different servers can be searched by choosing a server from the search list at the top of the search pane.

6.2 Screening for Content

Important: Depending on a user's role, the rights associated with that role, and the user profile, different menu options may appear on search or screening pages. In general, administrative users will see menus similar to those used to configure the system while end users will see menus containing typical functionality for users.

After installation, an additional Screening menu is available on the Search menu. In addition to search-like functionality, screening enables a user to isolate retention categories, folders, and content by their attributes. Screening enables the user to see what has happened or what could happen within a retention schedule.

Screening reports can be created immediately or they can be scheduled to be generated at a later time. This is especially useful for screening reports affecting large sets of content. Creating the screening report immediately might put a heavy load on the system, which could diminish its responsiveness and/or result in browser time-outs. To avoid the load on the system, schedule screening reports to be performed at midnight, an off-peak time in most environments.

Note: Scheduling reports is usually limited to those users with administrative privileges.

The screening interface may use user-friendly captions or may use standard retention terminology. Note that the interface depictions in this documentation show user-friendly captions.

6.2.1 Performing Screenings

This section describes a general procedure to perform screenings. A search can be done by retention categories, record folders, and content by disposition, disposition event criteria, record folder and/or retention category criteria. Click **Search** without entering any criteria, and all items are returned in the results. Different repositories can also be searched (physical and electronic).

Permissions: The Admin.Screening right is required to perform screening actions. This right is assigned by default to the Records Administrator role.

To screen data, complete the following steps:

1. Click **Search** then **Screening** from the Top menu. Select the screening type (Categories, Folders, or Content).

   The Screen for topic Page is displayed.

2. Depending on the type of screening chosen, different screening options are displayed. Select the criteria for the search from the provided menus.

   When screening content and records, the **Update Sort Fields** button is displayed. This opens a dialog where the user can select mulitple fields to use for sorting. For each field selected and moved to the **Search Fields** box, a checkbox appears below the fields section. Check the box to further refine if the sorting for that field should be in ascending order. If not checked, sort order is descending.

3. (Optional) if screening for a review or due date, specify the date in the **Review Due By** box or **Due for Action** box.
4. Select a **Freeze Status** to filter by items that are frozen or not frozen.
5. Select sorting preferences in the **Results Options** area.
   a. Sort by the default or select another option from the **Sort By** list.
   b. Sort in the default descending order or select the ascending order.
6. Click **Search**. Any results matching the screening criteria display in the Screening Results Page.

6.2.2 Scheduling a Screening Report

Permissions: You must have Records Administrator or PCM Administrator rights to schedule screening reports.

You may be able to only schedule screening reports and not execute them immediately, depending on the setting of the "Only allow scheduled screening" option on the **Configure Retention Administration** page. See the *Oracle Fusion Middleware Setup Guide for Universal Records Management* for details about configuring the system.

Use this procedure to schedule a screening report:

1. Click **Search** then **Screening** then the screening type from the Top menu.

   The Screen for topic Page is displayed.
2. Select the criteria for the screening and click the **Schedule** button.

   The Schedule Screening Report Page is displayed.
3. Provide a **name** for the screening report.
4. Provide the **start date** of the screening report. This is the date the scheduled screening report will be generated. If the screening report is recurring, the first screening report will be generated for the first time on this date, and all subsequent reports at the end of each recurring period after this date.
5. To create the report periodically rather than just once, select the **Is Recurring** box. Specify the interval at which the recurring screening report will be created (for example, every 2 weeks).
6. Click **OK** when done.

The Scheduled Screening Reports Page is displayed, which now includes the newly created scheduled screening report.

6.2.3 Setting Default Metadata For Reports

Permissions: You must have Records Administrator or PCM Administrator rights to schedule screening reports.

Recurring screening reports are automatically checked into the repository. Use this procedure to set the default metadata for these checked-in reports:

1. Click **Records** then **Configure** from the Top menu. Click **Metadata** then **Screening Metadata Defaults**.

   The Default Metadata for Checked-In Screening Reports Page is displayed.

2. Specify the default metadata for checked-in screening reports.
3. Click **Submit Update** when done.

7 Working With Records Folders

This section covers several tasks associated with the general maintenance and processing of record folders. Not all tasks are available to all users. Rights and roles determine which functionality is available to different users.

This chapter covers the following topics:

Concepts

Tasks

For information about creating, editing, and deleting record folders in the retention schedule, see the *Oracle Fusion Middleware Setup Guide for Universal Records Management*.

7.1 About Folder Maintenance

Maintaining and processing folders involves tasks such as moving folders, handling events such as canceling, expiring, or rescinding folders, or marking folders as obsolete for any other condition. After a record folder is marked as obsolete, any enabled event triggers associated with the content begins the disposition processing based on such events. In addition, tasks associated with record folders include applying specific disposition rules or supplemental markings to folders, or temporarily extending retention periods when disposition processing is frozen.

The following options appear on the Item's **Actions** menu and on the Information Page menu for a folder:

- **Information**
  - **Folder Information**: displays content information for the retained item.
  - **Life Cycle**: shows the complete life cycle of the retained item according to its scheduled disposition, including the calculated dates of each disposition action. For more information, see "Viewing Folder Life Cycle" on page 7-3.

- **Recent Reviews**: shows a list of everyone who has reviewed the retained item (and marked it as reviewed), with the date and time of review. For more information, see "Viewing a Folder Review History" on page 7-4.
- **Metadata History** (only available for content in a retention schedule): shows an overview of all changes made to the editable properties of the item, with the affected metadata field name, the modification date and time, and the old and new values. For more information, see "Viewing Folder Metadata History" on page 7-4.
- **Classified Metadata History**: shows a list of all changes made to the security classification of the content.
- **Review Classification**: shows information pertaining to an item's classification status. Only available if classification has been enabled.

■ **Edit**

- **Edit Folder:** Used to edit the properties of a folder. See the *Oracle Fusion Middleware Setup Guide for Universal Records Management* for details.
- **Edit Review**: Used to edit the review status, review period, or reviewer of the record folder.
- **Move**: Used to move the folder to another location. See the *Oracle Fusion Middleware Setup Guide for Universal Records Management* for details.
- **Close (Unclose)**: Closes the record folder to further filing by anyone other than users with the Folder.Open/Close right. This action toggles to **Unclose** when a record folder is already frozen. See "Closing or Unclosing (Reopening) a Record Folder" on page 7-5.
- **Freeze**: Freezes a record folder. See "Freezing or Unfreezing a Record Folder" on page 7-5.
- **Unfreeze**: Unfreezes a record folder. See "Freezing or Unfreezing a Record Folder" on page 7-5.

■ **Set Dates**

- **Cancel**: Cancels all content within a record folder. The Cancel option makes content obsolete. See "Canceling Folders" on page 7-7.
- **Expire**: Expires all content within a record folder. The Expire action makes content obsolete. See "Expiring a Folder" on page 7-7.
- **Obsolete (Undo Obsolete)**: Marks all content within a record folder and the record folder itself as obsolete. See "Making a Folder Obsolete" on page 7-7. This action toggles to **Undo Obsolete** when a record folder becomes obsolete due to Obsolete, Cancel, Expire, or Rescind actions. See "Reversing a Folder's Obsolete Status" on page 7-8.
- **Rescind**: Rescinds a record folder and the content therein. The Rescind action makes content obsolete. See "Rescinding a Folder" on page 7-7.
- **Mark reviewed/Mark reviewed recursive**: Marks a record folder as reviewed for review, destruction, or other review purpose. See "Marking a Record Folder as Reviewed" on page 7-8.
- **Undo Cutoff**: Only available if a record folder has been cut off. This reverses the cut-off.

■ **Delete**: See the *Oracle Fusion Middleware Setup Guide for Universal Records Management* for details.

- **Create**: See the *Oracle Fusion Middleware Setup Guide for Universal Records Management* for details.
  - Create Record Folder
  - Create Content
  - Create Physical Record
- **Reports**: See the *Oracle Fusion Middleware Setup Guide for Universal Records Management* for details.
  - Detail Report
  - Retention Schedule Report

7.2 Managing Folders

The following tasks are involved in managing folders:

- "Viewing Information" on page 7-3
- "Moving, Closing, or Freezing a Folder" on page 7-4
- "Canceling, Expiring, and Rescinding Folders" on page 7-6
- "Classification Settings for Folders" on page 7-8
- "Setting Dates with External Folders" on page 7-11

7.2.1 Viewing Information

> **Permissions:** The Folder.Read right is required to perform these actions. All predefined management roles have this right.

Viewing folder information can be done in different ways depending on the location in the product hierarchy. First locate the item by browsing, searching, or screening. Then perform one of the following actions:

- On the search or screening results page, select **Information** then the option (**Life Cycle**, **Recent Reviews**, and so on) from the folder's **Actions** menu.
- On the search or screening results page, click the **Info** icon of the folder.

  The Record Folder Information Page is displayed. On the Page's top menu, select **Information** then the option needed (**Life Cycle**, **Metadata History**, and so on).

The information displayed depends on the configuration and if optional fields were populated.

7.2.1.1 Viewing Folder Life Cycle

Use the previously described procedure to access the **Information** menu to view the life cycle (disposition schedule) of a record folder. The disposition instructions must be defined for the retention category of the folder. After a folder has been cut off, the record folder begins disposition processing and cannot be edited.

When **Life Cycle** is selected, the Life Cycle of Record Folder Page is displayed.

The page shows the complete life cycle of the record folder according to its scheduled disposition, including the calculated dates of each disposition action if the trigger event has occurred.

7.2.1.2 Viewing a Folder Review History

Use the previously described procedure to access the **Information** menu to view the review history of a record folder.

When **Recent Reviews** is selected, the Folder Review History Page of the record folder is displayed.

The page shows a list of everyone who has reviewed the record folder and marked it as reviewed and the date and time of review.

7.2.1.3 Viewing Folder Metadata History

Use the previously described procedure to access the **Information** menu to view the metadata history of a record folder. This is a list of all changes to the metadata of the record folder. When **Metadata History** is selected, the Metadata History of the record folder is displayed.

The page shows an overview of all changes made to the editable properties of the record folder and the affected metadata field name, the modification date and time, and the old and new values.

7.2.1.4 Viewing Folder Freeze Details

Use the previously described procedure to access the **Information** menu to view detailed freeze information about a record folder (that is, a list of all freezes currently applied to the folder). When **Freeze Details** is selected, the Freeze Details Page is displayed.

If the record folder is frozen, the Freeze Disposition field value is 'Yes' on the Folder Information Page and a **Details** hyperlink is displayed next to the field value. Click that hyperlink to view Freeze information.

The Freeze Details Page shows all freezes currently applied to the record folder. If the folder inherited its freeze status from a parent folder, that folder's name is shown in the Inherited From column for the inherited freeze. Click the **Info** icon for an item in the list. The Record Folder Information Page for the folder is displayed.

To save the information on this page to a file in the report, choose the **Save Freeze Details** option from the Page menu.

If the generated report file is in PDF format, it must be viewed using Adobe Acrobat version 6.0 or later.

7.2.2 Moving, Closing, or Freezing a Folder

Permissions: The appropriate Folder rights (Folder.Move, Folder.Open/Close, Folder.Freeze/Unfreeze) are required to perform these actions. These rights are assigned by default to the Records Officer and Records Administrator roles.

Managing folder information can be done in different ways depending on the location in the product hierarchy. First locate the item by browsing, searching, or screening. Then perform one of the following actions:

- On the search or screening results page, select **Edit** then the option (**Close**, **Move**, and so on) from the folder's **Actions** menu.
- On the search or screening results page, click the Info icon of the folder.

The Record Folder Information Page is displayed. On the Page's top menu, select **Edit** then the option needed.

The information displayed depends on the configuration and if optional fields were populated.

7.2.2.1 Moving a Record Folder

You can move a record folder to another retention category or folder.

Use the previously described procedure to access the **Edit** menu for the folder to move. When **Move** is selected, the Select Category or Folder Dialog is displayed. Click to expand the tree, and click the category or record folder where the folder will be moved. The location field populates with the new location. Click **OK** when done.

If a record folder inherits its security settings and disposition rules from its parent category, make sure the new location has the same settings. If a record folder has its own security settings, moving the folder is not a security concern. Because record folders also inherit disposition instructions from the parent category, be sure any new category location has the disposition instructions appropriate for the record folder. If a record folder has its own disposition rule or rules, then moving the folder is a concern for disposition processing. If a record folder has its own disposition instructions, the folder cannot be moved until the association is removed. Then re-create the rules unique to the folder in its new location if necessary.

7.2.2.2 Closing or Unclosing (Reopening) a Record Folder

After a record folder is closed, no further content can be checked (filed) into the closed record folder or its subfolders (child record folders) unless the user has the Folder.Open/Close right or is the author of the closed folder. If a user without these rights attempts to file content into a closed folder, a message is displayed stating the folder is closed. The content is not filed.

> **Important:** Closing a folder does not prevent disposition processing; only freezing a folder pauses disposition processing.

Closing a record folder refers to "locking" a record folder, and does *not* correlate with collapsing and expanding record folders within the Browse Content area. A closed or "locked" record folder is indicated with a padlock image superimposed on the record folder icon:

Depending on settings in a user's profile, the icons may appear slightly different, such as a book background icon rather a folder.

Use the previously described procedure to access the **Edit** menu for the folder to close. When **Close** is selected, a prompt appears to enter a reason for the action. Enter a reason, and click **OK** to confirm or leave the text box empty and click **OK**. Click **Cancel** to abort the entire action.

If confirmed, the folder icon includes a padlock to indicate it is closed.

To unclose or "unlock" a folder, select **Edit** then select **Unclose** from a menu. Follow the same procedure as the one described to close a folder.

7.2.2.3 Freezing or Unfreezing a Record Folder

Freezing a record folder inhibits disposition processing for that folder. Frozen folders can still be browsed within the Browse Content area, content can be checked into frozen folders, and other edits as allowed by assigned rights can be done. Record folders residing in a frozen folder inherit the freeze status from their parent folder, but they can also be frozen independently of the folder (usually with a different freeze).

When freezing a record folder, choose from several predefined freezes and enter a reason for freezing the folder. The reason is displayed in the Comments section of the audit trail, and in the Record Folder Information and Edit Record Folder pages. A frozen record folder is indicated by a pause symbol in the folder Name field of the Exploring Retention Category page:

More than one freeze can be applied to a record folder. View the Freeze Details Page for the record folder to see a list of all freezes currently applied to the folder (both direct and inherited). See the *Oracle Fusion Middleware Setup Guide for Universal Records Management* for details about creating and viewing freezes.

Use the previously described procedure to access the **Edit** menu for the folder to freeze. Select **Edit** then **Freeze** from the **Actions** menu. The Freeze/Unfreeze Dialog is displayed. Click the displayed link to show all freezes and select the freeze to be applied. Provide a reason for the freeze or leave the text box empty.

Click **OK** to confirm the freeze. Click **Cancel** to abort the entire action. If confirmed, the freeze icon (two parallel vertical bars) appears next to the record folder name in the **Name** column of the Exploring page.

Note: After a record folder is frozen, you cannot edit its freeze reason. If the freeze is no longer correct, you should unfreeze the folder and freeze it with a new reason.

Unfreezing a record folder releases a frozen folder again for disposition processing. Only one record folder at a time can be unfrozen. Follow the same procedure to unfreeze a folder, selecting **Edit** then **Unfreeze** from a menu. If the action is confirmed, the freeze icon no longer appears next to the record folder name in the **Name** column of the Exploring page.

7.2.3 Canceling, Expiring, and Rescinding Folders

Permissions: The Folder.Edit right is required to perform these actions. This right is assigned by default to the Records Officer and Records Administrator roles.

Manipulating folders can be done in different ways depending on the location in the product hierarchy. First locate the folder by browsing, searching, or screening. Then perform one of the following actions:

- On the search or screening results page, select **Set Dates** then the option (**Cancel**, **Expire**, and so on) from the folder's **Actions** menu.
- On the search or screening results page, click the Info icon of the folder.

  The Record Folder Information Page is displayed. On the Page's top menu, select **Set Dates** then the option needed.
- To perform actions on multiple folders, select **Set Dates** then the option from the Table menu on the search result page.

You can undo these actions by choosing **Set Dates** then choosing **Undo Obsolete** in the **Actions** menu for the folder or on the Page menu of the Record Folder Information Page.

7.2.3.1 Canceling Folders

Use the previously described procedure to access the **Set Dates** menu to cancel a record folder directly, either after receiving a notification to do so (as part of a disposition instruction) or ad hoc. When a record folder is canceled, its status becomes obsolete.

Select **Cancel** from the **Set Dates** menu. A prompt appears to enter a reason for the action. Enter a reason or leave the text box empty. Click **OK** to confirm. Click **Cancel** to abort the entire action.

The Record Folder Information Page displays the date the record folder was canceled and also displays a corresponding obsolete date.

7.2.3.2 Expiring a Folder

Use the previously described procedure to access the **Set Dates** menu to expire a record folder directly, either after receiving a notification to do so (as part of a disposition instruction) or ad hoc. When a record folder is expired, its status becomes obsolete.

You can also expire a record folder if you are a records administrator processing pending events that receive notification.

Select **Set Dates** then **Expire**. A prompt appears to enter a reason for the action. Enter a reason or leave the text box empty. Click **OK** to confirm. Click **Cancel** to abort the entire action.

The Record Folder Information Page displays the date the record folder was expired.

7.2.3.3 Rescinding a Folder

Use the previously described procedure to access the **Set Dates** menu to rescind a record folder directly, either after receiving a notification to do so (as part of a disposition instruction) or ad hoc. When a record folder is rescinded, its status becomes obsolete.

Select **Set Dates** then **Rescind** from a menu. A prompt appears to enter a reason for the action. Enter a reason or leave the text box empty. Click **OK** to confirm. Click **Cancel** to abort the entire action.

The Record Folder Information Page displays the date the record folder was rescinded.

7.2.3.4 Making a Folder Obsolete

There are certain actions that automatically cause a record folder to become obsolete:

- Expire
- Cancel
- Rescind

You can also mark a folder as obsolete without using one of these actions. Use the previously described procedure to access the **Set Dates** menu to mark a record folder obsolete. When **Set Dates** then **Obsolete** is selected, a prompt appears to enter a reason for the action. Enter a reason or leave the text box empty. Click **OK** to confirm. Click **Cancel** to abort the entire action.

The Record Folder Information Page displays the date the record folder was made obsolete.

7.2.3.5 Reversing a Folder's Obsolete Status

Use this procedure to reverse the obsolete status or a record folder. The status of expired, canceled, or rescinded record folders can be reversed.

Permissions: The Folder.Edit right is required to perform this action. This right is assigned by default to the Records Privileged and Records Administrator roles.

Use the previously described procedure to access the **Set Dates** menu to reverse obsolete status.

When **Set Dates** then **Undo Obsolete** is selected from a menu, a prompt appears to enter a reason for the action. Enter a reason or leave the text box empty. Click **OK** to confirm. Click **Cancel** to abort the entire action.

7.2.4 Classification Settings for Folders

The following tasks are performed when managing classification settings for record folders:

- "Undoing a Record Folder Cutoff" on page 7-8
- "Marking a Record Folder as Reviewed" on page 7-8
- "Assigning Supplemental Markings to a Record Folder" on page 7-9
- "Removing Supplemental Marking from a Record Folder" on page 7-10
- "Applying a Specific Disposition Rule to a Record Folder" on page 7-10

7.2.4.1 Undoing a Record Folder Cutoff

Use this procedure to undo (cancel) the cutoff of a record folder. After this procedure, the record folder is no longer cut off and is available for disposition.

Permissions: The Folder.UndoCutoff right is required to perform this action. This right is assigned by default to the Records Administrator role.

1. Browse content in the Retention Schedule to locate the appropriate record folder. Records administrators can use screening to quickly isolate record folders.
2. In the row of the folder, click **Set Dates** then **Undo Cutoff** in the item's **Action** menu.

7.2.4.2 Marking a Record Folder as Reviewed

Use this procedure to mark a record folder as reviewed in the Item Information page. Two commands are available:

- Mark reviewed
- Mark reviewed recursive

The Mark Reviewed action marks the current folder only as reviewed. Any child folders are not marked as reviewed. The Mark reviewed recursive action marks the current record folder being viewed as reviewed, with any child record folders and content. The "Mark reviewed recursive" option is only displayed if a record folder has child folders.

Permissions: The Folder.Edit right is required to perform this action. This right is assigned by default to the Records Officer and Records Administrator roles.

---

1. Click **Browse Content** then **Retention Schedules**. The Exploring Series "Retention Schedule" Page is displayed.
2. Navigate to the record folder to use and review the information.
3. In the row of the folder, click **Set Dates** then click **Mark Reviewed** (to mark only the current folder as reviewed) or **Mark reviewed recursive** (to mark all child folders and content as reviewed) from the folder's **Actions** menu.
4. You are prompted to enter a reason for the action. Enter a reason and click **OK** to confirm or leave the text box empty. Click **Cancel** to abort the entire action.

   The Record Folder Information Page displays the date the record folder was reviewed.

7.2.4.3 Assigning Supplemental Markings to a Record Folder

Use this procedure to mark a record folder created with one or more supplemental markings, if it was not marked at initial folder creation.

Prerequisites

- Enabling Supplemental Markings
- Creating a Supplemental Marking
- Creating a Record Folder

See the *Oracle Fusion Middleware Setup Guide for Universal Records Management* for details.

Permissions: The Folder.Edit right is required to perform this action. This right is assigned by default to the Records Officer and Records Administrator roles.

---

1. Click **Browse Content** then **Retention Schedules**. The Exploring Series "Retention Schedule" Page is displayed.
2. In the row for the folder, click **Edit** then **Edit Folder** from the folder's **Actions** menu.

   The Create or Edit Record Folder Page is displayed.
3. Open the list in the **Supplemental Markings** field and click to select the marking or markings to associate with the record folder.
4. Click **Submit Update**. The successfully updated record folder message is displayed.

7.2.4.4 Removing Supplemental Marking from a Record Folder

Permissions: The Folder.Edit right is required to remove a supplemental marking from a record folder. This right is assigned by default to the Records Officer and Records Administrator roles.

---

1. Click **Browse Content** then **Retention Schedules**. The Exploring Series "Retention Schedule" Page is displayed.
2. Navigate to the record folder to use.
3. In the row of the folder, click **Edit** then **Edit Folder** from the folder's **Actions** menu.

   The Create or Edit Record Folder Page is displayed.
4. Delete a marking by editing the text in the **Supplemental Markings** text box.
5. Click **Submit Update**. A message is displayed, indicating the update was successful.

Important: Each supplemental marking must have a comma and a space between markings, or else an 'access denied' error occurs when trying to access content with multiple markings and when **Match All Markings** is enabled.

7.2.4.5 Applying a Specific Disposition Rule to a Record Folder

Use this procedure to apply a disposition rule within a retention category to a specific record folder only. This makes it possible to customize disposition instructions for a category with multiple record folders with slightly different disposition instructions.

Prerequisite

- Define the Disposition Instructions. See the *Oracle Fusion Middleware Setup Guide for Universal Records Management* for details.

Permissions: The Folder.Edit right is required to perform this action. This right is assigned by default to the Records Officer and Records Administrator roles.

To apply a disposition rule to a specific record folder, complete the following steps:

1. Click **Browse Content** then **Retention Schedules**. The Exploring Series "Retention Schedule" Page is displayed.
2. Navigate to the category that contains the record folder to use. In the page menu, click **Edit** then **Edit Disposition**.

   The Disposition Instructions Page is displayed.
3. Click the **Edit** icon (the pencil icon).

   The Disposition Rule Screen is displayed.
4. Change the disposition rules as needed. In the Advanced section, choose a folder from the **Apply to Record Folder** list (or the **On Folder(s)** list, if user-friendly captions are configured).

The screen closes. The record folder appears next to the rule.

5. You can further refine the disposition by selecting how the disposition is applied. Select an option from the **Disposition Applies To** list. Available choices are Content Only, Folders Only, or Content and Folders.
6. In the Disposition Instructions Page, click **Submit Update**. The successfully updated dispositions message is displayed with the specific folder noted.

For more details about adding dispositions, see the *Oracle Fusion Middleware Setup Guide for Universal Records Management*.

7.2.5 Setting Dates with External Folders

Permissions: The Folder.Edit right is required to perform these actions. This right is assigned by default to the Records Officer and Records Administrator roles.

An external record folder is external to the records management system, and has a tangible counterpart to the electronic record folder that tracks it. An external record folder is indicated on the Record Folder Information Page by the information field "External: Yes."

Setting dates can only be done on the Create or Edit Record Folder Page. Use one of these methods to access that page:

- On the search or screening results page, click **Edit** then **Edit Folder** from the folder’s **Actions** menu.
- On the search or screening results page, click the **Info** icon of the folder.

  The Record Folder Information Page is displayed. On the page’s top menu, click **Edit** then **Edit Folder** then the option needed.

7.2.5.1 Activating a Record Folder

In the External fields area of the Create or Edit Record Folder Page, click the calendar component icon and select a date for the **Activation date** box.

Click **Submit Update**. The Record Folder Information Page displays the activation date for the record folder.

7.2.5.2 Expiring a Record Folder

Entering an expiration date for a record folder also makes the folder have an obsolete status and date matching the expiration date.

In the External fields area, click the calendar component icon and select a date for the **Expiration date** box.

Click **Submit Update**. The Record Folder Information Page displays the new date.

7.2.5.3 Entering a Delete Approval Date for an External Folder

Use this procedure to enter an approval date for deleting at an external record folder from the retention schedule. Entering the delete approval date does not prevent deleting an external folder before that date. It only indicates the date when deleting the external folder was approved.

In the External fields area, click the calendar component icon and select a date for the **Delete Approval date** box.

8

Managing Physical Content

This section discusses the creation and management of physical items using Physical Content Management.

It covers the following topics:

Concepts

- "Managing Physical Items" on page 8-1

Tasks

- "Creating a Physical Item" on page 8-2
- "Creating a Physical Item Within Another Item" on page 8-3
- "Editing a Physical Item" on page 8-3
- "Moving a Physical Item" on page 8-4
- "Adding Physical Items To A Content Basket" on page 8-4
- "Viewing Reservations for a Physical Item" on page 8-5
- "Marking a Physical Item as Reviewed" on page 8-5

8.1 Managing Physical Items

Physical content metadata (including storage information and retention schedules, if any) can be stored in the repository. When checking in a physical content item, provide its basic metadata information and where the item is stored by selecting a location in the defined storage space. If a user has the appropriate privileges, the user can also assign a retention schedule to the item, which determines the item's life cycle.

A physical barcode on the item can be associated with an electronic bar code stored in Physical Content Management. This allows a user to track and manage physical items in an electronic fashion.

This section discusses the tasks involved in managing physical items:

- "Creating a Physical Item" on page 8-2
- "Creating a Physical Item Within Another Item" on page 8-3
- "Editing a Physical Item" on page 8-3
- "Moving a Physical Item" on page 8-4
- "Adding Physical Items To A Content Basket" on page 8-4
- "Viewing Reservations for a Physical Item" on page 8-5

- "Marking a Physical Item as Reviewed" on page 8-5

8.1.1 Creating a Physical Item

When creating a new physical item, check in its metadata, storage information, and retention schedule in the repository. This information is subsequently used to track the physical item and manage its life cycle.

A physical item can be created by simply checking in the item as a physical item. Other methods can also be used to create a physical item:

- "Using the Storage Page" on page 8-2
- "Within a Retention Schedule" on page 8-2
- "Creating a Physical Item Within Another Item" on page 8-3

8.1.1.1 Using the Storage Page

Permissions: The PCM.Physical.Create right is required and the Record.Create right is needed in Oracle URM to perform this task. The PCM.Physical.Create right is assigned by default to the PCM Requestor and PCM Administrator roles. The Record.Create right is assigned by default to the predefined Records Privileged and Records Administrator roles.

Use this procedure to create a new physical item as a record using the Exploring Storage Page.

1. Click **Physical** then **Storage** from the Top menu.

   The Exploring Storage Page is displayed.

2. Click **Create Physical Item** on the **Action** menu for the location where the item will be stored.

   The Create or Edit Physical Item Page is displayed.

3. Provide the information for the new physical item as required, including it storage and record-related information.

4. Click **Create** to submit the information about the new physical item to the repository.

   The Physical Item Information Page for the new physical item is displayed.

8.1.1.2 Within a Retention Schedule

Permissions: The PCM.Physical.Create right and the Record.Create right is required in Oracle URM to perform this task. The PCM.Physical.Create right is assigned by default to the PCM Requestor and PCM Administrator roles. The Record.Create right is assigned by default to the predefined Records Privileged and Records Administrator roles.

Use this procedure to create a new physical item as a record within the retention schedules hierarchy in Oracle URM. This is done by placing the item directly into a retention category or records folder.

1. Click **Browse Content** then **Retention Schedules**.
2. Navigate to the records retention category or records folder in the hierarchy where the physical item will be added.
3. Click **Create** then click **Check In New Physical Item** from the **Action** menu of the location where the item will be stored.

   The Create or Edit Physical Item Page is displayed with the full retention schedule path to the current retention category at the top of the page.
4. Provide the information for the new physical item as required.

   The page does not contain the Life Cycle field because the physical item is automatically assigned the retention and disposition rules of the current (or inherited) retention category.
5. Click **Create** to submit the information about the physical item to the repository.

   The Physical Item Information Page for the new physical item is displayed with the **Is Record** field set to "Yes."

8.1.1.3 Creating a Physical Item Within Another Item

Permissions: The PCM.Physical.Create right is required to perform this task. This right is assigned by default to the PCM Requestor and PCM Administrator roles.

Use this procedure to create a new physical item within an existing physical item. This may be useful in situations to create a "container" physical item (for example, of object type "Box") and add several "content" physical items within it (for example, of object type "Folder").

1. Click **Physical** then **Storage** from the Top menu.

   The Exploring Storage Page is displayed.
2. Click **Create Physical Item Within** on the **Action** menu for the location where the item will be stored.

   The Create or Edit Physical Item Page is displayed.
3. Provide the information for the new physical item as required, including it storage and record-related information.
4. Click **Create** to submit the information about the new physical item to the repository.

   The Physical Item Information Page for the new physical item is displayed.

8.1.2 Editing a Physical Item

Permissions: The PCM.Physical.Edit right is required to perform this task. This right is assigned by default to the PCM Requestor and PCM Administrator roles.

Use this procedure to edit the properties of an existing physical item.

1. Search for the physical item.
2. On the search results page, click **Edit** then click **Edit External Item** in the item's Action menu.

   The Create or Edit Physical Item Page is displayed.
3. Modify the physical item properties and click **Submit Update** when finished.

   The item's information page is displayed with the updated properties.

8.1.3 Moving a Physical Item

> **Permissions:** The PCM.Physical.Move right is required to perform this task. This right is assigned by default to the PCM Requestor and PCM Administrator roles.

Use this procedure to move an existing physical item from one location in the storage space hierarchy to another.

1. Search for the physical item.
2. On the search results page, click **Edit** then **Edit External Item** in its **Action** menu.

   The Create or Edit Physical Item Page is displayed.
3. Modify the **Current Location** and/or **Permanent Location** fields as required, and click **Submit Update** when finished.

   The item's information page is displayed again with the updated location(s).

8.1.4 Adding Physical Items To A Content Basket

Use this procedure to add one or more physical items to a content basket. The content basket serves as a personal storage space for users where they can temporarily store multiple items for later processing. For example, if users want to reserve physical items for check-out, they search for all items they want to reserve, and add each of them to their content basket. After adding all items, they can open their content basket and make a reservation request for the items in the basket.

> **Important:** The content basket must be defined prior to use and a content basket should be designated as the active basket.

After an item is added to a content basket, a user can access the content basket from the **My Content Server** menu.

1. Search for the physical item(s) to be added.
2. On the search results page, select the box of each item to add to the basket.
3. Click **Actions** then **Add to Active Content Basket** in the Table menu.

   The Content Basket Page is displayed listing all items currently in the content basket.

8.1.5 Viewing Reservations for a Physical Item

Permissions: The PCM.Reservation.Readright is required to perform this task. This right is assigned by default to the PCM Requestor and PCM Administrator roles.

Use this procedure to view all outstanding reservation requests for a physical item.

1. Click **Physical** then **Storage** from the Top menu.
2. Navigate to the item to use. Click **Information** then **View Reservations** in the item's **Action** menu.

   The Reservation Search Results Page is displayed listing all outstanding reservation request for the current physical item.

8.1.6 Marking a Physical Item as Reviewed

Use this procedure to mark a physical item as reviewed after receiving a notification the item was due for review (as part of a disposition instruction):

1. Search for the physical item to mark as reviewed or select it from the review list by clicking **Records** then **Approvals** then **Pending Reviews**.
2. On the search results page, choose the **Mark Reviewed** option in the item's Action menu. Multiple items can be marked as reviewed by clicking the checkbox next to the item then clicking **Set Dates** then **Mark Reviewed**.
3. Enter a reason for the action or leave the text box empty, and click **OK**. Click **Cancel** to abort the entire action.

View the review history of an item by choosing **Information** then clicking **Recent Reviews** in the Page menu on that item's information page.

9

Processing Chargebacks

Chargebacks are used with Physical Content Management.

Chargebacks are fees charged to people or businesses for the use of storage facilities or actions performed on physical items in the storage facilities. They can also be used to provide an explanation for storage actions.

This chapter discusses the processing of charges and invoicing. Not all tasks discussed here can be performed by all users. Access to functionality is dependent on assigned rights and roles.

This chapter covers the following topics:

Concepts

Tasks

- "Marking an Invoice As Paid" on page 9-10

9.1 About Chargebacks

Invoices can be generated for the storage, use, reservation, and destruction of the managed content. The invoices can then be sent to internal or external customers in accordance with applicable business procedures.

The administrator sets up *charge types* (billable events), *payment types* (methods of payment), and *customers* (users or organizations who will be billed). After being set, each billable action (creation, reservation, storage, destruction) can be charged to a particular customer by creating invoices containing one or more transactions on physical items occurring for these customers. Automatic transactions are those in which the charges are calculated at transaction time.

A **charge type** is a defined transaction triggered by certain criteria. For example, the creation of a physical item of object type "Box" and media type "Box" may cost $5 per occurrence, while reservation of an item with priority "ASAP Rush" may cost $20.

Whenever someone performs an action meeting the criteria of a charge type, a billable transaction is recorded for the associated user or organization (customer). The system uses the most specific charge type. If charge type A has two criteria and charge type B has the same two criteria plus another one, charge type B is recorded for a transaction meeting all three criteria of charge type B even though it also meets the two criteria of charge type A.

An amount of money is associated with each charge type which can be per item or for a specific period.For example, you could charge a fee every time a physical item is created (or reserved or destroyed), or charge a monthly fee to store a physical item.

A **payment type** specifies how internal or external customers pay for services. Pre-defined payment types include credit card or check. Custom payment types can also be created.

Customers are internal or external users or organizations who are charged for the services rendered on physical items. They will receive the invoices generated by Physical Content Management (in accordance with the applicable business procedures) and make the payments for the chargebacks.

After the charge types, payment types, and customers are defined, they can be used to create **invoices** to submit to the customers for each billable event. Invoices can be run on as as-needed basis or they can be scheduled automatically in accordance with defined criteria.

9.1.1 Chargeback Process

A site's specific reservation process may differ from the one described here, depending on the procedures in place.

The typical fulfillment process of a chargeback is as follows:

1. A user performs a billable action (for example, creates, reserves, or stores a physical item in storage).

   If automatic transactions are enabled (see "Creating Automatic Transactions" on page 9-7 for details) when the user performs one of these actions on the physical item, those items are matched against all defined charge types. Each action on each item is matched against current transactions. If there is no match to a transaction, the action will not be recorded for chargeback.

2. The transaction is recorded in the system. The administrator should make sure there are transactions in place to cover as many variations as possible regarding actions on physical items. In this way chargeback can be made more automatic and require less individual attention for each request made for a physical item.
3. The administrator generates an invoice, either automatically through using scheduled invoices or manually by generating individual invoices.
4. The invoice is sent to the customer according to business procedures. The Physical Content Management functionality does not e-mail invoices or otherwise deliver them.
5. The bill is paid or otherwise considered paid according to company procedures.
6. After the bill is paid, the administrator marks the invoice as paid within the Physical Content Management feature.

9.2 Configuring Chargeback Processing

Administrators set up charge types, payment types, and customers.

Permissions: The PCM.Admin.Manager right is required to perform this action. This right is assigned by default to the PCM Administrator role. In addition, the chargeback feature has its own set of rights which define what users can do in this area.

The out-of-the-box Physical Content Management functionality comes with the following predefined charge actions:

- **Creation**: A user is billed if a physical item is created.
- **Destruction**: A user is billed if a physical item is destroyed.
- **Reservation**: A user is billed if a reservation request is made for a physical item.
- **Storage**: A user is billed if a physical item is stored.

The out-of-the-box Physical Content Management functionality comes with the following predefined payment types:

- **Credit Card**: To charge a customer paying with a credit card.
- **Check**: To charge a customer paying by check.

9.2.1 Creating or Editing a Charge Type

Permissions: The PCM.Admin.Manager right and the CBC.ChargeBacks.Create right are needed to perform this action. These rights are assigned by default to the PCM Administrator role.

Use this procedure to create a new charge type to be used for chargebacks.

1. Click **Physical** then **Configure** from the Top menu. Click **Charges** then **Type**.

   The Configure Charge Type Page is displayed.
2. Click **Add**.

   The Create or Edit Charge Type Page is displayed.

3. Specify the properties of the charge type and click **OK**.

   The new charge type is now added to the top of the list on the Configure Charge Type Page.

   Permissions: The PCM.Admin.Manager right and the CBC.ChargeBacks.Edit rights are needed to perform this action. These rights are assigned by default to the PCM Administrator role.

To modify a page, select the item to edit in the list of items and click **Edit Charge Type** from the item's **Action** menu. Modify the properties as required and click **OK** when finished.

9.2.2 Viewing a Charge Type

Permissions: The PCM.Admin.Manager right and the CBC.ChargeBacks.Read right are needed to perform this action. These rights are assigned by default to the PCM Administrator role.

Use this procedure to view the properties of an existing charge type.

1. Click **Physical** then **Configure** from the Top menu. Click **Charges** then **Type**.

   The Configure Charge Type Page is displayed.

2. In the list of charge types, select the item and click the item's **Info** icon.

The Payment Type Information Page is displayed listing all properties of the existing charge type.

9.2.3 Deleting a Charge Type

Permissions: The PCM.Admin.Manager right and the CBC.ChargeBacks.Delete right are needed to perform this action. These rights are assigned by default to the PCM Administrator role.

Use this procedure to delete an existing charge type.

1. Click **Physical** then **Configure** from the Top menu. Click **Charges** then **Type**.

   The Configure Charge Type Page is displayed.

2. In the list of existing charge types, select the item to edit, and click **Delete Charge Type** in the item's **Action** menu or select an item's checkbox and click **Delete** in the Table menu.

The charge type is deleted.

9.2.4 Creating or Editing a Payment Type

Permissions: The PCM.Admin.Manager right and the CBC.ChargeBacks.Create right are needed to perform this action. These rights are assigned by default to the PCM Administrator role.

Use this procedure to create a new payment type to be used for chargebacks.

1. Click **Physical** then **Configure** from the Top menu. Click **Charges** then **Payment Methods**.

   The Configure Payment Methods Page is displayed.

2. Click **Add**.

   The Create or Edit Payment Method Page is displayed.

3. Specify the properties of the payment type, and click **OK**.

   The new payment type is now added to the bottom of the list on the Configure Payment Methods Page.

Permissions: The PCM.Admin.Manager right and the CBC.ChargeBacks.Edit right are needed to perform the following action. These rights are assigned by default to the PCM Administrator role.

To modify a payment type, select the item to edit in the list of items and click **Edit Payment Type** from the item's **Action** menu. Modify the properties as required and click **OK** when finished.

9.2.5 Viewing a Payment Type

Permissions: The PCM.Admin.Manager right and the CBC.ChargeBacks.Read right are needed to perform the following action. These rights are assigned by default to the PCM Administrator role.

Use this procedure to view the properties of an existing payment type.

1. Click **Physical** then **Configure** from the Top menu. Click **Charges** then **Payment Methods**.

   The Configure Payment Methods Page is displayed.

2. In the list of payment types, select the item and click the item's **Info** icon.

   The Payment Type Information Page is displayed listing all properties of the existing payment type.

9.2.6 Deleting a Payment Type

Permissions: The PCM.Admin.Manager right and the CBC.ChargeBacks.Delete right are needed to perform the following action. These rights are assigned by default to the PCM Administrator role.

Use this procedure to delete an existing payment type.

1. Click **Physical** then **Configure** from the Top menu. Click **Charges** then **Payment Methods**.

The Configure Payment Methods Page is displayed.

2. In the list of existing payment types, select the item to edit, and click **Delete Payment Type** from the **Action** menu.

   The payment type is deleted.

9.2.7 Creating or Editing a Customer

Permissions: The PCM.Admin.Manager right and the CBC.ChargeBacks.Create right are needed to perform the following action. These rights are assigned by default to the PCM Administrator role.

Use this procedure to create a new customer to be used for chargebacks.

1. Click **Physical** then **Configure** from the Top menu. Click **Charges** then **Customers**.

   The Configure Customers Page is displayed.

2. Click **Add**.

   The Create or Edit Customer Page is displayed.

3. Specify the properties of the customer and click **OK**.

   The new customer is now added to the bottom of the list on the Configure Customers Page.

Permissions: The PCM.Admin.Manager right and the CBC.ChargeBacks.Edit right are needed to perform the following action. These rights are assigned by default to the PCM Administrator role.

To modify a customer, select the customer to edit in the list of customers and click **Edit Customer** from the **Action** menu on the customer list. Modify the properties as required and click **OK** when finished.

9.2.8 Viewing a Customer

Permissions: The PCM.Admin.Manager right and the CBC.ChargeBacks.Read right are needed to perform the following action. These rights are assigned by default to the PCM Administrator role.

Use this procedure to view the properties of an existing customer.

1. Click **Physical** then **Configure** from the Top menu. Click **Charges** then **Customers**.

   The Configure Customers Page is displayed.

2. In the list of customers, select the item and click the item's **Info** icon.

   The Customer Information Page is displayed listing all properties of the existing customer.

9.2.9 Deleting a Customer

Permissions: The PCM.Admin.Manager right and the CBC.ChargeBacks.Delete right are needed to perform the following action. These rights are assigned by default to the PCM Administrator role.

Use this procedure to delete an existing customer.

1. Click **Physical** then **Configure** from the Top menu. Click **Charges** then **Customers**.

   The Configure Customers Page is displayed.

2. In the list of existing customers, select the item to delete, and click **Delete Customer** in the item's **Action** menu. To delete multiple customers, click the checkbox for the customers and click **Delete** from the Table menu.

   The customer is deleted.

9.2.10 Creating Automatic Transactions

Automatic transactions can be defined by selecting the transaction type and enabling it. Use this procedure to enable automatic transactions:

1. Click **Physical** then **Configure** from the Top menu. Click **Charges** then **Automatic Transactions**.

   The Configure Automatic Transactions Page is displayed.

2. Select the transaction which should be made automatic by selecting the transaction's box.

3. When finished, click **Submit Update**.

9.2.11 Creating or Editing a Manual Transaction

You can create a manual transaction in much the same way as creating automatic transactions. Use this procedure to add a manual transaction:

1. Click **Physical** then **Configure** from the Top menu. Click **Charges** then **Manual Transactions**.

   The Create Manual Transaction Page is displayed.

2. Enter the necessary information for the transaction.

3. When finished, click **Create**.

9.2.12 Deleting a Manual Transaction

Permissions: The PCM.AdminManager right, the CBC.ChargeBacks.Delete right, and the CBC.ChargeBacks.Admin right are required to perform this task. These rights are assigned by default to the PCM Administrator role.

Use this procedure to delete an existing transaction.

1. Click **Physical** then **Configure** from the Top menu. Click **Chargebacks**.

The Charge Invoices Page is displayed.

2. Select the link to **Transactions with No Invoice**.
3. In the list of transactions, click the **Delete** checkbox for the one to delete.

9.3 Managing Chargeback Tasks

This section discusses the processing of charging, invoicing, and billing. See the *Oracle Fusion Middleware Setup Guide for Universal Records Management* for details about setting up transaction types, charge types, and billers.

The following tasks are involved when managing chargebacks:

- "Creating or Scheduling an Invoice" on page 9-8
- "Adjusting an Invoice" on page 9-8
- "Deleting an Invoice" on page 9-9
- "Viewing Invoice Information" on page 9-9
- "Printing an Invoice" on page 9-9
- "Marking an Invoice As Paid" on page 9-10

9.3.1 Creating or Scheduling an Invoice

Permissions: The PCM.AdminManager right, the CBC.ChargeBacks.Create right, and the CBC.ChargeBacks.Admin right are required to perform this task. These rights are assigned by default to the PCM Administrator role.

Use this procedure to manually create a new invoice.

1. Click **Physical** then **Invoices** from the Top menu. Click **Chargebacks**.

   The Invoices Page is displayed.
2. Click **Add**.
3. Select the content criteria used to screen for items to be included on the invoice (for example, records from a certain department).
4. Enter the necessary additional criteria to filter the transactions. Click **Generate Invoice** to create an invoice immediately or click **Schedule**. Click **Schedule** to display a scheduling page where schedule criteria can be entered.
5. Click **OK** when done.

9.3.2 Adjusting an Invoice

Permissions: The PCM.AdminManager right, the CBC.ChargeBacks.Edit right, and the CBC.ChargeBacks.Admin right are required to perform this task. These rights are assigned by default to the PCM Administrator role.

Use this procedure to edit an invoice.

1. Click **Physical** then **Invoices** from the Top menu.

   The Invoices Page is displayed.

2. Click **Edit** then **Adjust Invoice** in the **Actions** menu for an item.

   A screen is displayed where information on the invoice can be adjusted.

9.3.3 Deleting an Invoice

Permissions: The PCM.AdminManager right, the CBC.ChargeBacks.Delete right, and the CBC.ChargeBacks.Admin right are required to perform this task. These rights are assigned by default to the PCM Administrator role.

Use this procedure to delete an invoice.

1. Click **Physical** then **Invoices** from the Top menu.

   The Invoices Page is displayed.

2. In the list of invoices, click the box next to the invoice then click **Delete** from the Table menu.

9.3.4 Viewing Invoice Information

Permissions: The PCM.AdminManager right, the CBC.ChargeBacks.Read right, and the CBC.ChargeBacks.Admin right are required to perform this task. These rights are assigned by default to the PCM Administrator role.

Use this procedure to view an invoice.

1. Click **Physical** then **Invoices** from the Top menu.

   The Invoices Page is displayed.

2. Click the **Info** icon for the invoice with information to view.

9.3.5 Printing an Invoice

Permissions: The PCM.AdminManager right, the CBC.ChargeBacks.PrintInvoices right, and the CBC.ChargeBacks.Admin right are required to perform this task. These rights are assigned by default to the PCM Administrator role.

Use this procedure to print an invoice.

1. Click **Physical** then **Invoices** from the Top menu.

   The Invoices Page is displayed.

2. Click **Reports** in the **Action** menu for the invoice to print, and choose the type of report to produce.

9.3.6 Marking an Invoice As Paid

Permissions: The PCM.AdminManager right, the CBC.ChargeBacks.Admin right, and the CBC.ChargeBacks.Edit right are required to perform this task. These rights are assigned by default to the PCM Administrator role.

Use this procedure to mark an invoice as paid.

1. Click **Physical** then **Invoices** from the Top menu.

   The Invoices Page is displayed.

2. Click **Edit** then **Mark Paid** in the **Action** menu for the invoice to mark as paid.

10 Processing Reservations

The information in this chapter is only available if Physical Content Management has been enabled.

Reservations are used to manage physical items. Items can be checked out to users, reserved for later use, or requested. This chapter discusses reservation use and contains the following topics:

Concepts

Tasks

10.1 About Reservations

A user can put a hold on items that are currently unavailable (for example, someone else has the item). If others also made a reservation request for an item, that reservation is put on a waiting list, which specifies the order in which people made a reservation for the item.

A reservation request may comprise multiple items.

After a reservation request is made, an e-mail notification is sent to the administrator, who processes the request and starts the reservation fulfillment process in accordance with the applicable procedures in the organization.

If you are a user with the standard reservation privileges, you cannot make any changes to an existing reservation. You can only do so if your administrator has granted you special privileges beyond the defaults for a PCM requestor.

Each user can normally place only one reservation request for the same item. However,the administrator may have set up the system so a user can make multiple requests. This may be useful in environments where there are users who make reservation requests on behalf of several people.

10.2 Reservation Request Properties

Each reservation request has several properties, including:

- "Request Status" on page 10-2
- "Transfer Method" on page 10-2
- "Priority" on page 10-3

10.2.1 Request Status

The request status specifies the current status for a reserved physical item, which can be any of the following:

- **Waiting List**: The request item is currently already checked out to someone else. It will become available to the next requestor upon its return (unless the administrator chooses to override the waiting list order).
- **In Process** (initial default): The reserved item is available and is being prepared for delivery. Only one request item for a reservation can have the "In Process" status.
- **Not Found**: The request item could not be located in its designated location.
- **Unavailable**: The request item cannot currently be processed for delivery.
- **Denied**: The reservation request has been rejected by the administrator and cannot be fulfilled.
- **Canceled**: The reservation request was called off before it could be fulfilled.
- **Checked Out**: The reserved item is currently in the possession of someone as part of a reservation request. If a physical item is checked out, its current location (as shown on the Physical Item Information page) is automatically set to the value of the Deliver To Location field for the associated reservation request. If no value was entered in this field, the current location is set to "OTHER." Also, the current location comment on the Physical Item Information page) is set to the location comment specified for the associated reservation request. If no comment was provided, it is set to the login name of the user who made the reservation.
- **Overdue**: The reserved item is currently checked out to someone who has failed to return the item within the configured checkout time. As a result, the reservation request cannot currently be fulfilled.

  By default, an e-mail notification is sent out to the user who has an overdue item. This e-mail notification can be turned off.
- **Returned**: The checked-out item was returned to the storage repository, so it is available for other users to reserve and check out.

10.2.2 Transfer Method

The transfer method specifies how the person who made the request (the requestor) will receive the reserved item. Users specify the desired transfer method when a reservation request is created. The following transfer methods are supported:

- **Copy**: The physical content item will be duplicated and the copy will be provided to the intended recipient. The copy can be physical (for example, a copied DVD) or electronic (for example, an ISO image of a CD).
- **Fax**: The physical content item will be faxed to its intended recipient.
- **Mail**: The original physical content item will be mailed to its intended recipient.

- **Pickup**: The intended recipient will pick up the physical content item in person.
- **Email**: The content item will be e-mailed to its intended recipient.

10.2.3 Priority

The priority of a reservation request specifies the urgency with which it must be fulfilled. User specify the desired priority when they create a reservation request. The following priorities are supported:

- **No Priority**: Delivery of the requested item does not have any particular priority (there is no rush). The item can be delivered in accordance with the applicable fulfillment procedures.
- **ASAP Rush**: The requested item should be delivered to its intended recipient as soon as possible after the reservation was made.
- **This Morning**: The requested item should be delivered to its intended recipient the same morning the reservation was made.
- **Today**: The requested item should be delivered to its intended recipient the same day the reservation was made.
- **This Week**: The requested item should be delivered to its intended recipient the same week the reservation was made.

10.3 Managing Reservations

The following tasks are included when managing reservations:

- "Creating a Reservation Request" on page 10-3
- "Editing a Reservation Request" on page 10-4
- "Deleting a Reservation Request" on page 10-5
- "Viewing Reservations for a Physical Item" on page 10-5
- "Changing the Status of a Request Item" on page 10-5

10.3.1 Creating a Reservation Request

> **Permissions:** The PCM.Reservation.Create right is required to perform this task. This right is assigned by default to the predefined PCM Requestor and PCM Administrator roles.

Use this procedure to create a new reservation request for one or more physical items.

Reservation requests can only be made for physical (external) items. Error messages are displayed if an attempt is made to reserve electronic (internal) items.

By default, each user can place only one reservation request for the same item. If users make reservation requests on behalf of multiple people (for example, manager assistants), it may be useful to override this behavior. To do so, add the following variable to the physicalcontentmanager_environment.cfg configuration file:

```
AllowMultipleRequests=true
```

If a reservation request is created for a physical item containing other items, the other items are included in the reservation. The child items are not seen in the request, but when a checkout is done for the parent item, all child items are also checked out. YA reqeust can be made for each of the child items, but they cannot be checked out until the parent item is returned.

As soon as a reservation request is submitted, the status of all request items is automatically changed to "In Process," unless their status is already "In Process" or "Checked Out." In that case, it is changed to "Waiting List."

Users with the standard reservation privileges (those with the predefined 'pcmrequestor' role) cannot make any changes to an existing reservation by default. In order to edit existing reservation requests, they must be given the PCM.Reservation.Edit right.

To make a reservation request, complete the following steps:

1. Search for the physical item(s) to reserve and add them to the content basket.
2. Click **My Content Server** then click **My Content Basket**.

   The Content Basket Page is displayed.
3. Select the box of each physical item to reserve and click **Request** then **Request Selected Items** from the Table menu. To reserve all items in the content basket, choose **Request All Items**.

   A prompt is displayed asking if the selected items should be removed from the content basket after they are reserved.
4. Click **Yes** or **No**. Click **Cancel** to stop the reservation request.

   The Create or Edit Request Page is displayed.
5. Specify the properties of the new reservation request, such as the transfer method, priority, and delivery location.
6. Click **Create** when finished.

The status of all request items is now automatically changed to "In Process," unless their status is already "In Process" or "Checked Out." In that case, it is changed to "Waiting List." The items are reserved and the administrator is notified about the reservation request. After the administrator processes the reservation request, it can be fulfilled in accordance with the procedures in the organization.

10.3.2 Editing a Reservation Request

Permissions: The PCM.Reservation.Edit right is required to perform this task. This right is assigned by default to the predefined PCM Administrator role. A user can edit an owned reservation without this right depending on the settings when PCM was configured.

Use this procedure to modify the properties of an existing reservation request.

1. Click **Physical** then **Reservations** from the Top menu.

   The Reservation Search Results Page is displayed.
2. Locate the reservation request to edit and click **Edit** then **Edit Request** from its Action menu.

   The Create or Edit Request Page is displayed.

3. Modify the properties of the reservation request and click **Submit Update** when finished.

10.3.3 Deleting a Reservation Request

Permissions: The PCM.Reservation.Delete right is required to perform this task. This right is assigned by default to the predefined PCM Administrator role. A user can delete an owned reservation without this right depending on the setting when PCM is configured.

Use this procedure to delete an existing reservation request. Deleting a reservation request effectively cancels it.

1. Click **Physical** then **Reservations** from the Top menu.

   The Reservation Search Results Page is displayed.

2. Locate the reservation request to delete and click **Delete Request** from its **Action** menu.

   The reservation request is deleted immediately, without any further prompts. If there were no errors, a message is displayed stating the reservation request was deleted successfully.

10.3.4 Viewing Reservations for a Physical Item

Permissions: The PCM.Reservation.Read right is required to perform this task. This right is assigned by default to the predefined PCM Requestor and PCM Administrator roles.

Use this procedure to view all outstanding reservation requests for a physical item.

1. Search for the physical item.
2. On the search results page, click **Information** then click **View Reservations** in the item's **Action** menu.
3. The Reservation Search Results Page is displayed listing all outstanding reservation request for the current physical item.

10.3.5 Changing the Status of a Request Item

Permissions: The PCM.Reservation.Edit right is required to perform this task. This right is assigned by default to the predefined PCM Administrator role. Users can change the status of an owned reservation without this right depending on the settings when PCM was configured.

Use this procedure to change the status of a request item in an existing reservation request.

1. Search for the request item to change.

2. On the Reservation Search Results Page locate the request item with statuses to change and click **Information** then **Request Item Information** from its **Action** menu.

   The Request Item Information Page is displayed.

3. Choose **Edit** on the Page menu.

   The Edit Request Item Page is displayed.

4. Select a new status and click **Submit Update** when finished.

11 Managing Content

Content Folios and Content Basket are two ways to assemble and track groups of content. Full details about using Folios and Content Basket are discussed in the *Oracle Fusion Middleware User's Guide for Content Server*. This chapter discusses the basics of these two methods used to handle content.

The Content Basket Page is a personal storage space where a user can temporarily store multiple items for later processing. After adding items, a user can review the content basket and make reservation requests for the items in the basket.

This chapter discusses the following topics:

- "About Folios and Content Basket" on page 11-1
- "Creating, Updating, or Deleting a Basket" on page 11-2
- "Adding or Removing Items" on page 11-3
- "Sorting Items" on page 11-3
- "Creating Reservation Requests for Items" on page 11-3
- "Downloading Items" on page 11-4
- "Creating E-Mail Links to Items in the Content Basket" on page 11-5

11.1 About Folios and Content Basket

Content Folio is an optional component automatically installed with Oracle URM. It can be used to assemble and track groupings of content items in a virtual container such as a content basket. The Content Basket can contain any number of items managed by Oracle UCM, Oracle URM, Physical Content Management, or other add-on products.

Folio configuration is performed by administrators and can include custom template design and the creation of specific folio hierarchies designed to help manage content. This chapter does not discuss the details of folio use except how it interacts with the Content Basket. For more details about the use of folios at the organization, see the site administrator.

Items can be added to the Content Basket from the item's information page or search results page using options from the menus on those pages. The information displayed in the Content Basket Screens includes a thumbnail depicting the type of item, the content ID for the item, the item's title, native file name (if any), and source name. If the item is a physical item, source will always be "Physical."

The default display order for items in the content basket is the order in which they were added. Any new items are added to the bottom of the list. If adding multiple items at the same time (from a search results page), then the items are added in the order in which they were displayed on the search results page. The order of the items in the basket can later be changed.

In previous versions of this product, each user was automatically assigned a content basket. In the current version of the software, users must create their own content baskets. Any items in the user's basket prior to upgrading are not retained.

11.2 Using Content Basket

The following tasks are performed when using the Content Basket:

- "Creating, Updating, or Deleting a Basket" on page 11-2
- "Setting an Active Basket" on page 11-2
- "Adding or Removing Items" on page 11-3
- "Sorting Items" on page 11-3
- "Creating Reservation Requests for Items" on page 11-3
- "Downloading Items" on page 11-4
- "Creating E-Mail Links to Items in the Content Basket" on page 11-5

11.2.1 Creating, Updating, or Deleting a Basket

Use this procedure to create a basket or update an existing basket.

1. Click **My Content Server** then **My Baskets** from the Main menu.

   The Content Basket Manager Page is displayed.
2. To create a new basket, click **Append Content Basket** and enter the name of the new basket.
3. To delete a basket, click the **Delete** checkbox next to the basket name. If items are in the basket, they must first be removed before it can be deleted.
4. To change a basket, edit the displayed information.
5. When done making all changes, click **Update**. The Content Basket Manager Page is redisplayed with the changes in place.

11.2.2 Setting an Active Basket

Before using content baskets, set one basket as the default to be used for activities involving content.

1. Click **My Content Server** then **My Baskets** from the Main menu.

   A list of defined content baskets appears on the menu.
2. Click the name of the basket that will be made active.

A user can also navigate to the Content Basket Manager Page and click the **Active** button next to the a content basket name. Click **Update** to make that basket the active basket.

Only one basket can be active at a time and it can be changed at any time.

11.2.3 Adding or Removing Items

Use this procedure to add items to a content basket.

1. Search for the item(s) to add to the content basket.
2. On the search results page, select the box of each item to add to the content basket.
3. Click **Actions** then **Add to Active Content Basket** in the Table menu. Items can only be added to a basket designated as active.

   The content basket page is displayed, with the new item(s) added at the bottom of the list.

Use this procedure to remove items from the basket. When items are removed, they are only removed from the content baske. They are not deleted from the system:

1. Click **My Content Server** then click the name of the basket to use.

   The Content Basket Page is displayed.
2. Click the checkbox of the items to remove. Click **Actions** then **Remove Selected Items** from the Table menu.
3. To remove all items, click **Actions** then **Empty Content Basket** from the Page menu.

11.2.4 Sorting Items

Use this procedure to sort the items in a content basket. The display order of the items can be chaged by modifying the numbers in the Order Priority column.

1. Click **My Content Server** then the name of the basket to reorder.

   The Content Basket Page is displayed.
2. Click **Actions** then **Toggle Row Reorder**. Click the up or down arrows on individual rows to move the item upward or downward.

11.2.5 Creating Reservation Requests for Items

Use this option to make a reservation request for one or more physical items in a content basket.

Note: You can only make reservation requests for physical items.

---

1. Click **My Content Server** then the name of the basket to use.

   The Content Basket Page is displayed.

   If the content basket does not contain the item(s) to reserve, add them first. For more information, see "Adding or Removing Items" on page 11-3.
2. Select the checkbox of each physical item and click **Request** then **Request Selected Items** from the Table menu. To reserve all items in a content basket, click **Request** then **Request All Items**.

   A prompt is displayed asking if the selected items should be removed from the content basket after they are reserved.
3. Click **Yes** or **No**. Click **Cancel** to abort the reservation request.

   The Create or Edit Request Page is displayed.

4. Specify the properties of the new reservation request, such as the transfer method, priority, and delivery location.
5. Click **Create** when done.

The items are now reserved, and the administrator is notified of the reservation request. After the administrator processes the reservation request, it can be fulfilled in accordance with the procedures in an organization. If a reserved item is already checked out, the user is placed on a waiting list for that item.

11.2.6 Downloading Items

Use this procedure to download a zip file with one or more items in a content basket.

Note: You can only download items in a zip file if the system has been set up to support this feature.

---

1. Click **My Content Server** then the name of the basket to use.

   The Content Basket Page is displayed.

   If the content basket does not contain the item(s) to be reserved, add them first. For more information, see "Adding or Removing Items" on page 11-3.

2. Select the box of each item to download, and click a download option from the **Download** menu on the Table menu.

   Selecting to download to a workspace stores items in the user's workspace location. A workspace is defined on the user's profile page. It can be an FTP or WebDAV server, a path on the local file system to a location, or Other (which downloads a zip file to be saved at a specified location). Selecting to download to the workspace stores the items in the user's workspace location. If the location is an FTP or WebDAV server and authentication is needed, a dialog is displayed and credentials must be entered.

   - **Download Selected Items**
   - **Download All Items**
   - **Download Selected Items to Workspace**
   - **Download All Items to Workspace**

   A zip file called "Bundle.zip" is created and a dialog is displayed with a prompt for the location to open or save the file.

The contents of the zip file depends on the type of item:

- **Internal (electronic) items**: The zip file contains the selected rendition file for the item. The file name for the item is built up as follows:

  <*Item_Title*> (Primary | Web) [<*Content_ID*> Revision-<*Rev. No.*>].<*File_Extension*>

  where "Primary" refers to the native file rendition, and "Web" to the web-viewable rendition. For example: *Report2005 (Primary) [CS12025 Revision-2].doc.*

- **External (physical items)**: The zip file contains a file with the metadata, location, and retention information about the physical item, in the archive metadata format as specified on the Configure Records Management page. (See the*Oracle Fusion Middleware Setup Guide for Universal Records Management* for details.) The file name is built up as follows:

<Random_Number> (External Item) [*<Item_Name>*].*<File_Extension>*

where the file extension depends on the configured format setting. For example: *810871584 (External Item) [Contracts2009].hda.*

11.2.7 Creating E-Mail Links to Items in the Content Basket

Use this procedure to create a new e-mail message in the default e-mail client, with information and links for one or more items in a content basket.

1. Click **My Content Server** then **My Content Basket**.

   The Content Basket Page is displayed.

   If the content basket does not contain the item(s) needed, add them first. For more information, see "Adding or Removing Items" on page 11-3.

2. Select the box of each item (rendition) to include in the e-mail message, and click **E-Mail Links** then **E-Mail Links to Selected Items** from the **Email Links** menu at the top of the page. To include all items in the e-mail message, click **E-Mail Link**s then **E-Mail Links to All Items**.

   A new e-mail message window for the default e-mail client is displayed, with "Content Item Rendition Links" as the subject line and links and information for the items in the message body.

Some e-mail clients have limitations regarding the number of characters used in the body of a message. Adding a large number of items as links to an e-mail may exceed the limitation, resulting in some links not being listed.

Contents of E-Mail Message

What is included in the e-mail message for an item depends on the type of that item:

- **Internal (electronic) items**: The e-mail message contains the content ID and title of each selected item, links to the selected rendition file(s) for the item.
- **External (physical) items**: The e-mail message contains the name and title of each selected physical item, a link to the item’s information page.

12 Configuring Related Content (Links)

Links establish a type of relationship between content items. This may be useful when content items are related and need to be considered together, for example:

- A native file (for example, in Word) has several different renditions such as a PDF or thumbnail image, each of which is checked into the repository as a separate content item.
- A native file (for example, in Word) contains several embedded images, each of which is checked into the repository as a separate content item.
- A native file (for example, in Word) contains several links to other native files (for example, in Word), each of which is checked into the repository as a separate content item.

Links previously created using the RmaLinks component do not carry over if a newer version of software using the Related Content component is installed.

This chapter covers the following topics:

Concepts

Tasks

Examples

12.1 About Related Content

Related content establishes a type of relationship, or link, between individual items. The relationships are based on one of four available Relationship Classes. Several Predefined Relationship Types are also provided but custom relationship types can be added to suit the need of the site environment. See "Adding or Editing a Custom Relation Type (Administrative Function)" on page 12-7 for details.

Permissions: You can create relationships between items only to which you have access. You cannot create relationships to items for which you do not have adequate access privileges such as assigned rights, classification, supplemental markings, and so on.

There are two basic methods of creating relationships between items:

- **Creating a relationship from one existing item to another existing item**: If a relationship is created from an item in the system to another, existing item in the system, the search page can used during the process to access the existing item and link to it. For details see "Linking to an Existing Item" on page 12-9.
- **Creating a relationship from an existing item to a new item**: If a relationship from an item is added to a new item, use the content check-in page during the process to create the new item. For details see "Linking to a New Item" on page 12-9.

Important: When items are deleted, all corresponding relationships are deleted, except in the case when a superseded content item is in the midst of disposition processing. A "dangling relationship" exists until the superseded content item completes its disposition processing. Then the relationships are deleted.

12.2 Predefined Relationship Types

The following predefined relationship types are available:

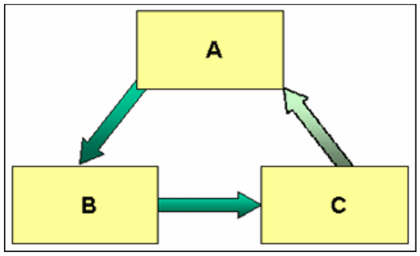
- Renditions, based on the Peer-to-Peer Class
- Supersedes, based on the Chained List Class
- Supporting Content, based on the Supporting Content Class
- Cross-Reference, based on the Cross-Reference Class

You can also define your own relationship types.

12.2.1 Renditions

The predefined Renditions type is based on the Peer-to-Peer Class. It is typically used to indicate peer relationships between items. "Rendition" in this sense means a link to a copy or some other version of an item. For example, an editable text item could be linked to a non-editable display content item, or a physical printed rendition. This type of relationship can be created by anyone in the RecordsGroup security group to link an item source file to any other renditions.

Figure 12–1 Renditions Links



For example, all versions of a file may be a different graphic type: .psd, .jpg, and .tif. This figure shows A (.psd) is linked to B (.jpg), and B is linked to C (.tif). Item C is linked indirectly by association to A, but it is not actually linked directly to A. If the link between A and B is removed (unlinked), then C is no longer linked by association to A.

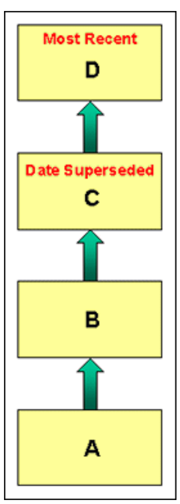
To step through an example of creating this type of link, see "Renditions Link Example" on page 12-11.

12.2.2 Supersedes

The predefined Supersedes relationship is based on the Chained List Class. It enablesa user to create a hierarchical chain of content items where each item in the list is superseded by another item. One example is a subject-to-review content item, which must be maintained with current information. The supersede type causes the previous content item to become obsolete.

A supersedes relationship creates a hierarchy chain between items. The supersedes relationship is special because it enables a user to harness the disposition processing to handle superseded items. This type of relationship is created by anyone in the RecordsGroup security group to link an item superseding another.

Figure 12–2 Supersedes Links



The Supersedes relationship can be set on any item in the chained list, but is typically set on the most recent. The supersede date is set on the item that was superseded, not on the superseding item. Only the most recent version is shown in the Links area on the Content Information page; not all revisions are shown. The most recent item that superseded another item is at the top of the chained list.

For example, a monthly report for April (A) will be superseded by a report in May (B) which is later superseded by a report in June (C), and so on. This figure shows A was superseded by B, which was superseded in turn by C, which was superseded by D. Item D is the most recent record. The date superseded is set on the previously active record, which in this scenario is item C. To step through an example of creating this type of relationship, see "Superseded Link Example" on page 12-13.

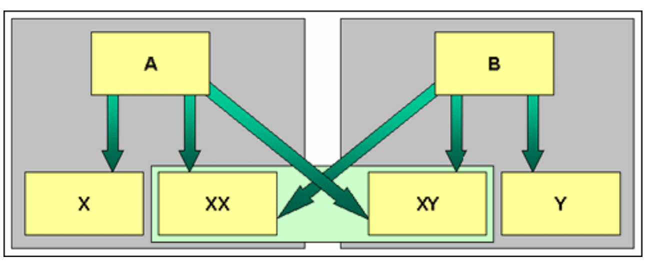
12.2.3 Supporting Content

The predefined Supporting Content type is based on the Supporting Content Class. There is one "main" item (the parent) which has several subordinate, supporting items (the children). Supporting content links are based on the premise that a supporting content child can have multiple parent items they support. However, there can be only one parent to multiple child items. A supporting content relationship type can create a single parent-multiple children hierarchy between items.

This type of relationship can be created by anyone in the RecordsGroup security group to link an item to other items supporting the initial parent item in some way. For example, an image can be linked to a text file describing the printing requirements of that image. The supporting content type of relationship for an item with embedded content can also be used.

This relationship is convenient for linking portions of web site content, such as an HTML document with placeholders to images, sound files, or video files. To create a parent-child type of relationship between items crossing usage reference boundaries, the supporting content type can accommodate tracking the item relationships. A single image might be used in multiple parent documents, for instance, and a single document might contain multiple images.

Figure 12–3 Supporting Content Links



For example, a Word document (A) may have embedded content such as a spreadsheet (X) and a graphic (XX). Another document (B) may use some of the the first document's content.

This figure shows A and B are the only parent items. Item A has children X, XX, and XY. Item B has children XX, XY, and Y. Both child items XX and XY have multiple parents, A and B. To step through an example of creating this type of link, see "Supporting Content Link Example" on page 12-14.

12.2.4 Cross-Reference

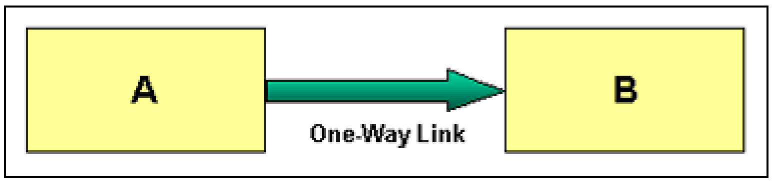
The predefined Cross-Reference relationship is based on the Cross-Reference Class. It is essentially a pointer from one item to another. This type of link can be created by anyone in the RecordsGroup security group to link items that reference each other. The link can be unidirectional (going one way only) or bidirectional (or reciprocal, going both ways).

To step through examples of creating these types of link, see "One-Way Cross-Reference Link Example" on page 12-11 and "Reciprocal Cross-Reference Link Example" on page 12-12.

12.2.4.1 Unidirectional Links

In this example, A is linked to B. On the content information page for A, item A indicates a cross-reference relationship to B. On the content information page for B, item B indicates it is cross-referenced by a relationship to A.

Figure 12–4 One Direction Cross-reference Relationship

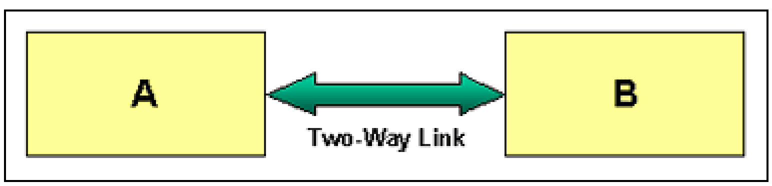


To step through an example of creating this type of relationship, see "One-Way Cross-Reference Link Example" on page 12-11.

12.2.4.2 Bidirectional (Reciprocal) Relationships

In the previous example, A points to B and vice versa. Item A is cross-referenced to B, and B is cross-referenced to A. When a reciprocal relationship is created from A to B, a cross-reference relationship is automatically created from B to A.

Figure 12–5 Both Directions (Reciprocal) Cross-reference Relationship



To step through an example of creating this type of relationship, see "Reciprocal Cross-Reference Link Example" on page 12-12.

12.3 Linking Methods

There are two basic methods of creating relationships:

- **Creating a relationship from one existing item to another existing item**: If a relationship is created from an item in the system to another, existing item in the system, the search page can be used during the linking process to access the existing item and link to it. For details see "Linking to an Existing Item" on page 12-9.
- **Creating a relationship from an existing content item to a new item**: If a relationship is added from an item in the system to a new item, use the content check-in page during the linking process to create the new item. For details see "Linking to a New Item" on page 12-9.

> **Important:** When items are deleted, all corresponding relationships are deleted except in the case when a superseded item is in the midst of disposition processing. A "dangling link" exists until the superseded item completes its disposition process then the relationships are deleted.

12.3.1 Relationship Classes

Each relationship type is based on a class definition of the relationship. There are four types of classes:

- Peer-to-Peer Class
- Chained List Class
- Supporting Content Class
- Cross-Reference Class

12.3.1.1 Peer-to-Peer Class

The peer-to-peer class represents a relationship between content where none of the items is more important than the other. There is no "master" or "parent" item. A typical example would be different renditions of a document (for example, Word, PDF, or thumbnail image). The relationship is a many-to-many (m:n) relationship between peer items. Many content items (m) can have many relationships to other content items (n).

The system comes with a predefined relationship type based on the peer-to-peer class: the Renditions type (see "Renditions" on page 12-2).

12.3.1.2 Chained List Class

The chained list class represents a relationship between content where the individual items are interconnected in series, thus creating a "chain" of linked items. An example would be incremental versions of items that supersede each other, where a user starts out with the first version, links the second version, links the third version, and so on. The latest linked item may supersede all previous items, but it does not need to. The relationship is a one-to-many (1:m) relationship between the superseding item and its superseded items. There can be one (1) content item that has superseded many (m) content items.

The chained list class is comparable to the revisions concept within Oracle UCM, but operates at a different level. Chained lists span multiple content items, whereas revision lists are for individual content items only.

Predefined types are available based on the chained list class: the Supersedes.

12.3.1.3 Supporting Content Class

The supporting content class represents a relationship between content where there is one "main" item (the parent) which has several subordinate, supporting items (the children). Typical examples would be documents containing embedded images, or web files with placeholders to external images, sound files, or video clips. The parent item then links to the embedded or external supporting files (children), each of which is checked into the repository as a separate item.

The relationship is a one-to-many (1:m) parent-child relationship between one "main" item and its supporting items. There can be one (1) parent content item that has many

(m) supporting content items. Even though there can only be one parent item in this relationship, child items can belong to multiple parents and reside in other sets of supporting content relationships. A child item can be the supporting content of many parents, but only one parent item can be supported by child items.

Predefined types are available based on the supporting content class: the Supporting Content link type (see "Supporting Content" on page 12-4).

12.3.1.4 Cross-Reference Class

The cross-reference class represents a one-to-one relationship between a pair of content items. The relationship is a cross-reference pointing a content item to another content item. The relationship can be unidirectional (pointing in one direction) or bidirectional (pointing in both directions, or reciprocal). A typical example would be a document containing a reference to another document, where these documents are linked together.

Predefined types are available based on the cross-reference class: the Cross-Reference link type (see "Cross-Reference" on page 12-4).

12.4 Managing Related Content

The following tasks are involved in managing links:

- Adding or Editing a Custom Relation Type (Administrative Function)
- Deleting a Custom Link Type
- Linking Items
- Unlinking an Item

12.4.1 Adding or Editing a Custom Relation Type (Administrative Function)

Adding or editing custom relations is restricted to users with Records Administrator rights.

You must use one of the predefined classes for this task.

> **Permissions:** The Admin.ConfigureLinkTypes right is required to perform this action. This right is assigned by default to the Records Administrator role.

1. Click **Records** then **Configure** from the Top menu. Click **Retention** then **Related Content Types**.

   The Configure Link Types Page is displayed.

2. Click **Add Related Content Type**.

   The Add or Edit Related Content Type Page is displayed.

3. Enter a name in the **Name** box.
4. (Optional) Enter a destination in the **Destination** box.
5. Select a type from the **Class** list. For more information about classes, see "Relationship Classes" on page 12-6.
6. Click **Add**.

   The new type is added.

Use this procedure to edit the name or destination of a custom type. The class cannot be edited.

1. Click **Records** then **Configure** from the Top menu. Click **Retention** then **Related Content Types**.

   The Configure Link Types Page is displayed.

2. Click **Add Related Content Type**.

   The Add or Edit Related Content Type Page is displayed.

3. In the **Actions** menu for the custom link to edit, click **Edit**.

   The Add or Edit Related Content Type Page is displayed.

4. If required, edit the name in the **Name** box.
5. If required, enter or edit a destination in the **Destination** box.
6. Click **Submit Update**.

   The type is updated on the Configure Link Types page.

12.4.2 Deleting a Custom Link Type

You cannot delete built-in types (System = "Yes"). If a custom type is in use, it cannot be deleted until it is removed from use (see "Unlinking an Item" on page 12-9 for further details). When deleting a custom type, this deletes the type definition, but does not delete any of the associated items.

Permissions: The Admin.ConfigureLinkTypes right is required to perform this action. This right is assigned by default to the Records Administrator role.

1. Click **Records** then **Configure** from the Top menu. Click **Retention** then **Related Content Types**.

   The Configure Link Types Page is displayed.

2. Select **Delete** from the **Actions** menu for the existing link type to delete.

   You are prompted to confirm the action.

3. Click **OK**.

   The link type is deleted from the Configure Link Types page.

12.4.3 Linking Items

Links can be made to a new item or to an existing item. A link can be made from existing items in the retention schedule to new items checked in, or an existing item that is searched for:

- **Link New Item**: Opens the Content Check In Form so the user can check in a new item linked to an existing item.
- **Link Existing Item**: Opens the Search Page so a user can search for the existing items to link to an existing item.

Users can also create a link to an item during checkin. The Content Relations field is available at the bottom of the checkin page. Use the Browse button next to that field to search for an item to link.

12.4.3.1 Linking to a New Item

1. Access the existing item from which to link prefer:
   - Browse the retention schedule and list items within a category or record folder.
   - Screen Content for the item if you have the Records Administrator privilege.
   - Search for an existing item to link.
2. From the Retention Schedule, Screening Results, or Search Results page, select the relationship type from the item's **Actions** menu.
3. In the Page menu of the link page, click **Link** then **Link New Item.** The Content Check In Form is displayed.
4. Check in the new item to which to link. For more information about how to check in a content item, see Chapter 5, "Creating Content for Retention".

12.4.3.2 Linking to an Existing Item

1. Access the existing item from which to link:
   - Browse the retention schedule and list items within a retention category or record folder.
   - Screen Content for the item if you have the Records Administrator privilege.
   - Search for an existing item to link.
2. From the Retention Schedule, Screening Results, or Search Results page, select the relationship type from the item's **Actions** menu.
3. Click the **Add Link** action for the type of link to make. The link page for the link type opens.
4. In the menu of the link page, click **Link** then **Link Existing Item**. The Advanced Search Page is displayed.
5. Search for the item to which to link. For information about searching, see Chapter 6, "Searching and Screening Content". A search results page is displayed with a Link column added.
6. Select the box in the **Link** column next to the item or items to which to link.
7. From the Table menu, click **Link** then **Link Selected Items**. The Link Page for the type of link created is displayed, listing the item to which the link was established.

12.4.4 Unlinking an Item

Use this procedure to unlink two linked items. There may be some compelling reason to remove a link, such as rerouting a link, or using a different type of link altogether.

> **Important:** To unlink *destination links* such as Cross-Referenced By or Supported Content By, you must unlink from the content information page of the originating item. The destination links are the links appearing indented in the Links area of the content information page except for reciprocal cross-reference links. You can unlink from either link page in that case.

1. Navigate to the content information page of the item to unlink.
2. Click the links with a (+) to open the respective link page.

3. Select Unlink from the item's **Actions** menu.
4. A message is displayed asking for confirmation of removal of the link.
5. Click **OK**. The link page is displayed with the formerly linked content item no longer listed.

12.5 Link Examples

The following examples demonstrate how to create different types of links. The information in this section is restricted to users with the Records Administrator role:

- "Enclosures Custom Link Types Example" on page 12-10
- "Renditions Link Example" on page 12-11
- "One-Way Cross-Reference Link Example" on page 12-11
- "Reciprocal Cross-Reference Link Example" on page 12-12
- "Superseded Link Example" on page 12-13
- "Supporting Content Link Example" on page 12-14

12.5.1 Enclosures Custom Link Types Example

This example creates a link type with a custom name, and because it is a parent-child relationship, it also creates a destination link. The destination child link brings up any linked supporting items. This example creates a supporting content link types named "Enclosed by" with a destination link of "Enclosing Document," and "Enclosure of" with a destination link called "Enclosures."

1. Click **Records** then **Configure** from the Top menu. Click **Retention** then **Related Content Types**.

   The Configure Link Types Page is displayed.
2. Click **Add Related Content Type**.

   The Add or Edit Related Content Type Page is displayed.
3. Enter the name `Enclosed By` for the link in the **Name** box.
4. Enter `Enclosing Document` in the **Destination** box.
5. Select the **Supporting Content** link type from the **Class** list.
6. Click **Add**.

   The new link type is added to the Configure Link Types page.
7. Click **Add Related Content Type**.

   The Add or Edit Related Content Type Page is displayed.
8. Enter the name `Enclosure of` for the link in the **Name** box.
9. Enter `Enclosures` in the **Destination** box.
10. Select the **Supporting Content** link type from the **Class** list.
11. Click **Add**.

    The new link type is added to the Configure Link Types page.

The new custom link names are displayed in the Configure Link Types page. The Actions column is now populated with a menu for the custom link types, which are indicated by the System column being populated with the value "No."

The custom link types are also available to users in the Links area of the content information page. They are also available for use in the Page menu of the search results page.

If links exist for a particular link type, a plus sign (+) displays after the link type in the Content Information page.

An Enclosed By link to other content items is present for the current item. When a link is clicked, a list of the linked items is displayed.

12.5.2 Renditions Link Example

This example gives the basic steps for creating a renditions link between items. This example creates a rendition link from a newly checked in item to other newly checked in items. This example checks in a master graphics file called "Master PSD" and then checks in renditions, or different graphics formats of the same file (GIF, PNG, JPEG, BMP, and TIFF), as renditions links to the Master PSD file.

It is probably most convenient to link just after checking in an item because a user does not have to search or browse for the item.

1. Check in an item called "Master PSD." Immediately after checking in, click the Content Info link available on the check-in confirmation page.
2. In the Links area of the content information page, click **Renditions**. The Renditions link page is displayed and is initially blank for the new and unlinked item.
3. In the Page menu, click **Link** then **Link New Item**.
4. Check in an item called "GIF version" completing only required fields. After clicking **Check In**, the newly checked in and linked item is displayed in the Renditions link page for the item..
5. Repeat linking new and checking in versions called "JPEG" and "TIFF."

Click the Info icon and check the Renditions link for a rendition link. For any of the items on the Renditions link page, they all list each other in their own respective Renditions link pages. All items listed as a rendition link have a Renditions (+) indication on their content information pages.

12.5.3 One-Way Cross-Reference Link Example

This example creates a one-way cross-reference link. The one-way link points one item to another one. Item A ("Disaster Recovery Procedures") is cross-referenced to item B ("System Backup").

This example creates a one-way cross-reference between existing items. First search for the item to which to create links, and then search for the item or items to link. In this example, "Disaster Recovery Procedures" is linked to the existing "System Backup." For the purposes of trying this example, create two items with these titles and then search for them.

1. Browse the retention schedule or search for an existing item to link, for this example, the item called "Disaster Recovery Procedures." From the Retention Schedule or Search Results page, click the Info icon. The content information page for the item is displayed.

2. In the Links area of the content information page, click **Cross-References from the listed links**. The Cross-References link page for the item is displayed and is initially blank.
3. In the Page menu of the Cross-References Link page, click **Link** then **Link Existing Item**. The Search Results Page for linking the item is displayed.
4. Enter the search criteria, and click **Search**. The Search Results are displayed with a choice of items to link. The title indicates the item from which the user is linking. If the search criteria includes the item from which the user is linking, the box is grayed out and unavailable for selection. This prevents linking an item to itself. In the Search Results Page for linking, select the box for the items to have links.
5. In the Page menu of the Search for Links page, click **Link**. The items are linked, and the Cross-References Page is displayed again with the ID and Titles of items linked as cross-references. "
6. Now click the Info icon for a cross-referenced item to open the content information page. Scroll down to the Links area.
7. The item from which we are linking has a (+) appearing after the Cross-Referenced By link.
8. Click the Cross-Referenced By link. The "System Backup: Cross-Referenced By" link page for the item is displayed.
9. Click the Info icon and access the content information page for the cross-referenced item. The item from which the link originated has a plus sign (+) appearing after the cross-references link.

12.5.4 Reciprocal Cross-Reference Link Example

This example creates a two-way link, meaning the linked items point to each other. This example creates a reciprocal cross-reference between existing items. First search for the item to which to create links, and then search for the item to link. Similar screens to those used to create a cross-reference link are used and so are not replicated here.

As in the previous example, "Disaster Recovery Procedures" is linked to the existing "System Backup." For the purposes of trying this example, you can create two items with these titles and then search for the items. If you created links for the one-way example, unlink the items before proceeding with this example to view the same results as demonstrated for this example.

1. Browse the retention schedule or search for an existing item to link. From the Retention Schedule or Search Results page, click the Info icon. The content information page for the item is displayed.
2. In the Links area of the content information page, click **Cross-References from the listed links**. The Cross-References link page for the item is displayed and is initially blank.
3. In the Page menu of the Cross-References Link page, click **Link** then **Link Existing Item**. The Search Results Page for linking the item is displayed.
4. Enter your search criteria, and click **Search**. The search results are displayed for you to choose items to link. The title indicates the item you are linking from. If your search criteria includes the item from which you are linking, the box is grayed out and unavailable for selection. This prevents linking an item to itself. In the Search Results Page for linking, select the box for the items to which to create reciprocal links.

5. In the Page menu of the Search for links page, click **Link** then **Link Reciprocal**. The items are linked, and the Cross-References Page is displayed again with the ID and titles of items linked as cross-references.
6. Now click the Info icon for the cross-referenced item "System Backup" to open the content information page for the item which was just linked. Scroll down to the Links area. Notice the Cross-Reference and Cross-Referenced By links now indicate the reciprocal cross-reference links. Each Cross-References link now contains the plus (+) signs, and this appears for the content information pages of both items.
7. Click the Cross-Referenced By link. The Cross-Referenced By links page is displayed for the item.

You cannot perform any action from the Cross-Referenced By links page except viewing content information for any listed items. You must unlink the cross-referenced by items from their respective originating cross-references link pages; the same is true of Supported Content By or other "indented" (destination) links.

12.5.5 Superseded Link Example

This example demonstrates creating a superseded link. Because subject-to-review content must be kept up-to-date, this example demonstrates superseding items that are subject to review. However, you can supersede items not subject to review as well. This example locates an existing subject-to-review item, accesses the supersedes link, and checks in a new item that supersedes the existing one.

The supersedes link is a special type of link allowing you to take advantage of disposition processing to handle the superseded items. You can set up a category to have disposition processing rules such as "Destroy AFTER superseded" or "Archive AFTER superseded". The supersede linking does not itself process superseded items; you must file the item into a category whose disposition instructions include handling superseded states.

The most likely scenario for superseding is to link a new item to an existing item. When new content is linked superseded to existing content, the existing content becomes obsolete and is marked as superseded automatically. The superseded and obsolete dates are populated for you on the content information page of the superseded item.

The current reigning content is always at the top of the list of superseded content. The superseded content is all underneath the current one, and (Superseded) is indicated parenthetically after each superseded item. The superseded items are displayed in the order the superseding occurred, starting with the first at the bottom of the list.

Of course, you do not have to file content that might be superseded into categories containing disposition instructions explicit to superseded. Multiple versions of superseded content can exist; their respective disposition instructions may just involve a retention period and then a destruction.

To step through this example, create a subject-to-review item called "Status Report." If you have a non-production instance containing a subject-to-review category with disposition instructions for handling superseded content states, file the item into that category. Create another document called "new status report" but do not check it in before the example. It will be checked in during the example.

To try out this example:

1. Search for an existing item to link that is subject to review, for this example, an item called "Status Report."

2. From the search results page, select **Add Link (Supersedes)** from the **Actions** menu of the item to link. The Supersedes link page opens for the existing item called "Status Report."
3. Select **Link** then **Link New Item** on the Page menu. The Content Check In Form is displayed. Check in the document you created called "New Status Report" as a subject-to-review item into a category whose disposition instructions include actions to handle a superseded state.
4. The Supersedes link page is displayed again with the superseded content and its linked item shown. The originating content that was superseded is now in the list, with its superior item now listed above it.

   Because the disposition instruction of the "Status Report" is set to destroy when superseded, the administrator responsible for the item will receive a notification there is a pending event for the administrator to process (destroying the superseded item).

12.5.6 Supporting Content Link Example

This example demonstrates creating a supporting content link between existing content items.

1. Search for an existing item to link, for this example, an item called "Main HTML Home Page."
2. From the Search Results page, click **Add Link (Supporting Content)** from the Item **Actions** menu. The Supporting Content link page opens for the existing item called "Main HTML Home Page."
3. In the Page menu, click **Link** then **Link Existing Item**. The Advanced Search Page opens with the ID of the item displayed in the title.
4. Enter your search criteria, and click **Search**. The Search Results Page is displayed.
5. Select the item to link as supporting content by selecting the box for the item.
6. In the Page menu, click **Link**. The Supporting Content link page for the item is displayed again, listing the now linked items.
7. Repeat the supporting link process for the parent item "Annual Corporate Report Brochure" and link it to the child item "Corporate Logo," as shown below.
8. Click the Info icon to access the content information page for the Corporate Logo Image child item. The Supported Content By links indicates there are links present because there is a plus sign.
9. Click the **Supported Content By** link to display the link page for the child item. The Supported Content By indicates the content the item supports. The child item "Corporate Logo" displays its multiple parents.

13
Using Simple Profiles

Oracle URM uses Simple Profiles functionality. This enablesa user to set up customized check-in, search, and updating pages based on a site's needs.

This chapter provides an overview of profiles and details about how to create new profiles. It discusses the following topics:

13.1 About Simple Profiles

Simple Profiles are based on Content Profile functionality. Content Profiles is a field-based approach to customizing content screens. Simple Profiles is a form-based application. A software wizard tool steps the user through the process of creating a profile. Users can customize the forms by choosing what fields will appear, the order of the fields, and can create tool tips and prompts to remind the user of needed actions and valid entries.

Most users do not have the security privileges required to use the Content Profile tool in the Configuration Manager applet, but all users are able to use Simple Profiles, regardless of their security privileges. The Simple Profile functionality meets Department of Defense 5015 certification requirements and enables individual users to set their own defaults for a personal profile.

13.2 Creating a Profile

This section discusses how to set up a new profile using the Simple Profiles component.

System profiles are created by a administrator and can be accessed by any user according to the configuration. *Personal* profiles are created and configured by a user for personal use. If a administrator sets up a personal profile, it is available for use only by the administrator, not to others in the enterprise.

Permissions: The Records User right is required to perform this action.

Profiles limit information displayed on often-used pages, thus making it easier for users to see or enter only information which is directly relevant. Profiles can be considered a type of filter for what information will be displayed.

A profile is composed of *rules* and a *trigger value*, based on a *trigger field*. Select the trigger field in the initial step of setting up the profile then use the Simple Profiles interface to set the rules to control the trigger.

13.2.1 Trigger Fields

The first step in the profile process is to determine a trigger field. The trigger must match the following criteria:

- It must be an option list metadata field. The fields that are defined as option list fields are the only fields that appear in the list for trigger selection.
- After a trigger field has been defined for a system profile, it cannot be deleted from the system. (A user can delete a trigger field defined for a personal profile.)
- A trigger field can be disabled by a administrator using the Profiles tab of the Configuration Manager applet. Click **Select,** then select **none specified** from the Add Profile Screen, then click **OK**.

Caution: If a trigger field is disabled, all profiles are disabled but they remain listed on the Search and New Check In menu. If a trigger field is changed after profiles have been created that use that field, the existing profiles could become invalid.

If a metadata field in a document matches a trigger value for a profile that profile is used for the document.You can have an unlimited number of profiles, but only one trigger *value* per profile. For example, if a trigger field is dDocType, Profile 1 can use a trigger value of ADACCT. Profile 2 can use a trigger value of ADSALES.

13.2.2 Rules

A *rule* is a set of metadata fields that determine how the fields are displayed on the Check In, Update, Content Information, and Search pages. It also determines if fields are editable, required, hidden, excluded, or read-only. A rule can be evaluated for every profile (global) or can be evaluated for a specific profile.

A *global rule* is one which is always evaluated. It automatically affects the fields displayed on the Check In, Update, Content Information, and Search pages even if it is not included in a profile.

Global rules are evaluated first for documents and searches with profiles. Because profile rules are evaluated after global rules, global rules can be superseded by profile rules. However, administrators can set the priority for the global rule and increase its precedence.

Important: Global rules on system profiles affect all personal profiles that other users create. The defaults, descriptions, and labels that a administrator creates in this type of profile will be used on the personal profiles other users create if the rules are made global.

13.2.3 Profile Pages

After determining the trigger value, set up the following elements in Simple Profile pages by using either the profile configuration Wizard (when creating a new simple profile) or page menu options. See "Wizard Page Menu" on page A-71 or "Profiles Page Menu" on page A-70 for details.

> **Note:** Some of these elements are restricted to use by administrators only at a site. Available elements also may be limited by the configuration for a site.

- **Configure fields**: Use to choose the fields to appear on forms and whether those fields are excluded, hidden, uneditable (read-only) or required. See "Selecting Fields for Inclusion" on page 13-6 for details.
- **Set field formats**: Use to specify the formats for fields. See "Setting Field Formats" on page 13-7.
- **Set default values**: Use to set the default values for fields. See "Setting Default Values" on page 13-7 for details.
- **Set derived values**: Use to set the derived values for fields. See "Setting Default Values" on page 13-7.
- **Group fields**: Use to determine how the fields are grouped, the headings used, and any other descriptive information about the groups. See "Grouping Fields" on page 13-8 for details.
- **Set labels**: Use to change the display names for the fields used in the profile. See "Setting Labels" on page 13-9 for details.
- **Set descriptions**: Use to add a field label tool tip for a field to explain the field usage. See "Setting Descriptions" on page 13-9 for details.
- **Restrict options**: Use to restrict what appears on a form or to determine the order of options in a list, depending on the field choice. See "Restricting Options" on page 13-10 for details.
- **Set activation condition**: Use to set the activation condition that changes profile behavior based on different inputs. See "Setting Activation Conditions" on page 13-10 for details.
- **Limit access (Administrators Only)**: Use to limit access to a system profile based on a security group. See "Limiting Access (Administrators Only)" on page 13-11 for details.
- **Set search order**: Use to set the search order for search results and the direction of a search (ascending or descending). See "Setting the Search Order" on page 13-12 for details.

Include as many of these elements as needed in the profile.

Designing a profile consists of a number of steps. The exact number and order of the steps depends on the elements to be included in the profile. This document describes all the steps. Choose the steps needed for the profile.

13.3 Designing a Simple Profile

System profiles are profiles which can be used by all users. These are typically created by administrators. Personal profiles are profiles which are created by individual users for their own personal use. The following sections describe how to create and configure a profile.

Note: Some tasks are restricted to administrators.

Tip: When creating a new profile, you can test the effects of the profile and then edit the functionality. You can exit the Wizard at various points in the profile creation process and view the effect of the profile. To return to editing the profile, select **Edit**, then **Update Profile** from the Page menu bar for the profile. If you have closed the profile, from the Profile Listing Page select **Edit**, then **Update Profile** from the Actions menu for the desired profile. Use the Wizard Page Menu to quickly navigate to the specific page you need to update.

13.3.1 Adding a New Profile

Follow these steps to create a new system or personal profile using Simple Profiles. Add as many elements to the profile as needed. The pages that are displayed in the Wizard depend on the elements selected in the Wizard fields.

1. Access the Simple Profile functionality on the system. Click **Records** or **Physical** (to create a profile for physical items) then **Configure** then **Simple Profile**. Choose the profile type.

   The Profile Listing Page is displayed.

2. To create a new profile, click **Create**, then **Create Profile** or **Create Global Profile** on the Page menu bar.

   The Create/Update Simple Profile Page is displayed.

3. Enter a name for the profile. This name can be a maximum field length of 50 characters and cannot contain special characters (; @ &, and so on).
4. Enter a display label for the profile. This name appears in the New Check In menu list and in the Search menu list.
5. Enter a description for the profile.
6. Choose the trigger value for the profile. When the trigger field matches this trigger value, the profile will be used. Depending on the type of trigger chosen, a list may be available where a value can be selected.
7. If the rules in a profile should be used globally, select the **Is Global** check box. Global rules are those which are always evaluated, regardless of the criteria selected for the profile. An administrator can apply global rules to a system profile, which will affect all users. A user can apply global rules, however, those rules apply only to the user's personal profiles.

   Important: Global rules for a system profile may affect personal profiles. The defaults, descriptions, and labels created in the system profile may affect pages used in creating personal profiles.

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8. If global rule is selected, choose a priority number. A low priority number gives a lower precedence. The rule will be executed before other higher priority rules,

which means any changes made by higher priority rules may override those made by this rule.

9. Leave the Clear Search Trigger Value checkbox unchecked to prevent pre-populating the trigger value specified in step 6. Default behavior is to allow the trigger value to be inserted on the Search pages that use the profile. By checking this box, the trigger value is not used.
10. Select the auxiliary metadata set or sets to use as a source for field values.
11. Select the elements to include by clicking the appropriate check boxes in the Wizard Fields list.
12. When finished selecting elements to include, click **Save**.

    The first page in the configuration Wizard is displayed on the Create/Update Simple Profile Page.
13. Make any configuration choices for each page in the Wizard. After specifying the configuration for each page, click **Save**, and the Wizard will continue with the next page in the sequence.

    To avoid saving the configuration for a page, click **Reset** to return the settings to their original values. At any time during this process the user can click **Exit Wizard** and the configuration is saved in the new profile, even if the user has not completed all the pages.

    Note: In some pages, if you choose a field but don’t specify a value for it, a message will appear to tell you to specify a value.

14. When you finish configuring the last page in the profile Wizard sequence, click **Save**.

    The Simple Profile Information Page is displayed. From this page the user can update, delete, or copy the profile.

13.3.2 Using the Create/Update Profile Pages

The profile pages available for configuring a new simple profile depend on the options selected on the Create/Update Simple Profile Page. However, the following general procedure can be used to manage the information on any of the pages:

- Click a field name to designate it for use. To designate a block of fields, click the first field, then press the Shift key and click the final field in the block.
- Click the arrow icons to move the field from one location to another. A field can only be used in one location at a time. On some pages, arrow icons also can be used to sort the order of fields.
- If a field has an additional element, such as a label to be associated with the field or a value that can be selected, that information appears at the bottom of the page.
- To save the page and move to the next page in the Wizard sequence, click **Save**.
- To exit the process and save the profile at any point, click **Exit Wizard**.
- To reset the values on the page, click **Reset**.
- To receive help information for the page, click **Quick Help**.

13.3.2.1 Actions Menu Options

The Actions for the individual profiles lists the following frequently used actions:

- **Profile Information**: Displays the Simple Profile Information Page for the profile.
- **Update Profile**: Displays the Create/Update Simple Profile Page where elements can be selected to include in the profile.
- **Delete Profile**: Deletes the current profile.

13.3.2.2 Wizard Page Options

The Wizard Page Menu shows the pages available for use in the profile using the configuration wizard. Move between pages in the profile by selecting a page from this menu.

13.3.2.3 Saving, Resetting, and Exiting the Design Process

- To exit the profile design process, click **Exit Wizard** on any design page. A message is displayed, indicating the configuration wizard has been exited. Click **OK**.

  The Simple Profile Information Page for the profile is displayed.

  > **Important:** When you click **Exit Wizard** while using the configuration wizard, your profile is saved temporarily and does not appear on New Check In or Search menus for use. You must complete the design process and click **Save** in order to use the profile.

- To reset the current page and lose all changes made to it, click **Reset**.
- When finished the configuration on the page, click **Save**. The next page in the profile design sequence is displayed. When a user reaches the final page and clicks **Save**, the process is complete.

13.3.2.4 Selecting Fields for Inclusion

select **Field Configurations** from the Wizard Fields section on the Create/Update Simple Profile Page. The Simple Profile Field Configuration Page is displayed. Use this page to determine actions for the specified fields.

- **Excluded Fields**: these fields are not available for use on any future pages used in the profile design process.
- **Hidden Fields**: these fields can continue to be used even though they are not displayed. This allows a user to set defaults, descriptions, and other useful information for those fields which will remain on the form when the document is checked in.
- **Uneditable Fields**: these fields are those which cannot be altered during the Check In or Update process.
- **Required Fields**: these fields must be filled in by the user. If a field is designated as required, a message can be included when prompted at the bottom of the page.

1. Select the available fields to use and move them into the appropriate box on the opposite side of the page. Use the arrows to sort the order of the fields in each box.
2. If a selected field also has a required message, it is shown in a Required Messages section on the page. Review the information and make modifications.

3. When done, click **Save**.

   The next page in the profile creation process is displayed.

See "Using the Create/Update Profile Pages" on page 13-5 for details about moving fields into designated areas on this page. See "Saving, Resetting, and Exiting the Design Process" on page 13-6 for details about saving or resetting the page.

13.3.2.5 Setting Field Formats

Select **Field Formats** from the Wizard Fields section on the Create/Update Simple Profile Page. The Simple Profile Field Formats Page is displayed. Use this page to specify formats for the fields in the profile.

1. Select the available fields to use and move them to the Format Fields box.

   When a format field is selected, a Format Values section is displayed.

2. In the Format Values section, for each format field, click the box if a format hint is needed on the Check In page.

3. For each selected field, enter a format value for a format different than the existing format. Formats specify the type of information that can be entered by the user when the field appears on a form, usually alphabetic, numeric, or alphanumeric.

4. After setting all the field formats, click **Save**.

   The next page in the profile creation process is displayed.

See "Using the Create/Update Profile Pages" on page 13-5 for details about moving fields into designated areas on this page. See "Saving, Resetting, and Exiting the Design Process" on page 13-6 for details about saving or resetting the page.

13.3.2.6 Setting Default Values

Select **Field Defaults** from the Wizard Fields section on the Create/Update Simple Profile Page. The Simple Profile Field Default Values Page is displayed. Use this page to set default values for the fields in the profile.

1. Select the available fields to use and move them to the Default Fields box.

   When specifying a default field, a Default Values section is displayed.

2. In the Default Values section, for each default field a field value can be entered. Check the Advanced box where Idoc Script can be entered to specify how the default value will be used after evaluation for processing.

3. After setting all default values, click **Save**.

   The next page in the profile creation process is displayed.

See "Using the Create/Update Profile Pages" on page 13-5 for details about moving fields into designated areas on this page. See "Saving, Resetting, and Exiting the Design Process" on page 13-6 for details about saving or resetting the page.

13.3.2.7 Setting Derived Values

Select **Field Derived Values** from the Wizard Fields section on the Create/Update Simple Profile Page. The Simple Profile Field Derived Values Page is displayed. Use this page to set derived values for the fields in the profile.

1. Select the available fields and move them to the Derived Fields box.

   When a derived field is specified, a Derived Values section is displayed.

2. In the Derived Values section, for each derived field, specify a derived value. Check the Advanced box where Idoc Script can be entered to specify how the derived value will be used after evaluation for processing.
3. After setting all derived values, click **Save**.

   The next page in the profile creation process is displayed.

See "Using the Create/Update Profile Pages" on page 13-5 for details about moving fields into designated areas on this page. See "Saving, Resetting, and Exiting the Design Process" on page 13-6 for details about saving or resetting the page.

13.3.2.8 Grouping Fields

Select **Field Groups** from the Wizard Fields section on the Create/Update Simple Profile Page. The Simple Profile Field Groups Page is displayed. Use this page to group fields together on the Check In, Update, Search, and Content Information pages.

> **Note:** If you chose to configure fields and excluded some fields on the Simple Profile Field Configuration Page, those fields do not appear for use on this page. In addition, if you chose to hide fields, those fields do not appear for use on this page.

1. Select the available fields to use and move them to the Default box or an added group box. The Default box can be used for information that has pre-defined defaults, or for any fields that should appear at the bottom of the form that uses the profile.
2. To create a new group, click **Add Group**.

   The Edit Profile Group Dialog page appears.

   a. Enter a name for the new group. The ID can be a maximum of 50 characters and should not include special characters (#, @, etc.)

   b. Enter a header for the new group. The header appears on the form when the profile is used.

   c. Enter a description for the new group. When the user's cursor is placed on the title on the form, this description appears as a field label tooltip.

   d. Enter any detailed information that identifies the new group.

   e. Select the **Is Allow Collapse** box to allow users to collapse the group when viewing the page.

   f. Select the **Is Initially Collapsed** check box to collapse the group on initial use of the page.

   To exit without saving the group, click **Cancel**. When done creating the new group, click **Save**.
3. To edit any group on the page, including the Default group, click the page icon next to the group title.

   The Edit Profile Group Dialog for that group opens where information can be edited.
4. To delete a group, click the delete icon in the group title line.

   The fields that were selected for inclusion in the group are returned to the Available Fields box.

5. To rearrange the order of fields in a group, select a field, then click the up or down arrow icon to move the field into the appropriate position.
6. When finished arranging the groups on the page, click **Save**.

   The next page in the profile creation process is displayed.

See "Using the Create/Update Profile Pages" on page 13-5 for details about moving fields into designated areas on this page. See "Saving, Resetting, and Exiting the Design Process" on page 13-6 for details about saving or resetting the page.

13.3.2.9 Setting Labels

Select **Field Labels** from the Wizard Fields section on the Create/Update Simple Profile Page. The Simple Profile Field Labels Page is displayed. Use this page to add labels to fields on the Check In, Update, Search, and Content Information pages.

> **Note:** If you chose to configure fields and excluded some fields on the Simple Profile Field Configuration Page, those fields do not appear for use on the current page. In addition, if you chose to hide fields, those fields do not appear for use on this page.

1. Select the available fields and move them to the Labeled Fields box.

   If a labeled field is specified, a Label Values section is displayed.
2. For each specified labeled field, a label can be entered for the field next to the field name.
3. When done, click **Save**.

   The next page in the profile creation process is displayed.

See "Using the Create/Update Profile Pages" on page 13-5 for details about moving fields into designated areas on this page. See "Saving, Resetting, and Exiting the Design Process" on page 13-6 for details about saving or resetting the page.

13.3.2.10 Setting Descriptions

Select **Field Descriptions** from the Wizard Fields section on the Create/Update Simple Profile Page. The Simple Profile Field Descriptions Page is displayed. Use this page to add field label tooltips on the Check In, Update, Search, and Content Information pages.

> **Note:** If you chose to configure fields and excluded some fields on the Simple Profile Field Configuration Page, those fields do not appear for use on the current page. In addition, if you chose to hide fields, those fields do not appear for use on this page.

1. Select the available fields and move them to the Description Fields box.

   When specifying a description field, the Description Values section is displayed.
2. Enter a short description for each field in the Description Values section. This description appears as a field label tool tip when the user places the cursor on the field label.
3. If needed, enter a detailed description for a field. This description appears when the user clicks on the field label.

4. When done, click **Save**.

   The next page in the profile creation process is displayed.

See "Using the Create/Update Profile Pages" on page 13-5 for details about moving fields into designated areas on this page. See "Saving, Resetting, and Exiting the Design Process" on page 13-6 for details about saving or resetting the page.

13.3.2.11 Restricting Options

Select **Field Restricted Options** from the Wizard Fields section on the Create/Update Simple Profile Page. The Simple Profile Field Restricted Options Page is displayed. Use this page to restrict the choices on any option lists used in the profile.

> **Note:** Only fields that have option lists associated with them appear for use on this page.

1. Select the available fields and move them to the Restricted Fields box.
2. Select the field to restrict in the Restricted Fields box and click **Update Options**.

   The Restricted Options Dialog is displayed.
3. Select values to use in the Available Options box and move them to the Selected Options box.
4. To change the order of the options, click the up or down arrow icons. Use this tool to place more frequently used items at the top of the list.
5. To exit without saving the group, click **Cancel**. When done selecting and arranging the options, click **Save**.
6. When done selecting all option lists, click **Save**.

   The next page in the system profile creation process is displayed.

See "Using the Create/Update Profile Pages" on page 13-5 for details about moving fields into designated areas on this page. See "Saving, Resetting, and Exiting the Design Process" on page 13-6 for details about saving or resetting the page.

13.3.2.12 Setting Activation Conditions

Select **Activation Conditions** from the Wizard Fields section on the Create/Update Simple Profile Page. TheSimple Profile Activation Conditions Page is displayed. Use this page to specify the event, action, or state that triggers the rules in the profile.

> **Important:** By default all of the conditions are selected. Remove the selection for those conditions you do not want the profile to use.
>
> Not all combinations of activation conditions are valid and some may be mutually exclusive. Be careful when using combinations of condition types.

1. Choose activation conditions by selecting the box next to the appropriate activation condition:

   Event Activation Conditions

   - On request: when a search request is initiated.
   - On Submit: when a check in is initiated.

- On Import: when an archive is imported.

Action Activation Conditions

- Check In New: when checking in new content.
- Check In Selected: when checking in selected content.
- Info: when accessing content information.
- Update: when updating content information.
- Search: when searching for content.

Flag Activation Conditions

- Is Workflow: when a document is in a workflow
- Is Not Workflow: when a document is scheduled for a workflow but not active in the workflow.

> **Note:** If no workflow check box is selected, the workflow state is ignored as a criteria for activation.

2. Advanced box: To have script activated whenever this profile is submitted, enter the Idoc Script here. See the *Oracle Fusion Middleware Application Administrator's Guide for Content Server* for details about creating profile scripts.
3. When done, click **Save**.

   The next page in the profile creation process is displayed.

See "Using the Create/Update Profile Pages" on page 13-5 for details about moving fields into designated areas on this page. See "Saving, Resetting, and Exiting the Design Process" on page 13-6 for details about saving or resetting the page.

13.3.2.13 Limiting Access (Administrators Only)

Select **Limit Access Values** from the Wizard Fields section on the Create/Update Simple Profile Page. The Simple Profile Limit Access Values Page is displayed. Use this page to specify if access to the system profile should be limited according to pre-defined security accounts, roles, and groups for the Check In and Search pages.

> **Important:** You can limit access based on a security group and an account (if accounts have been enabled). A user must belong to the security group and account in order to use the profile.
>
> If a user is not a member of a security group, or a security group and an account, then the user will not see the profile in the Search or Check In menus.

1. Limit access to the Check In page by selecting the security group from the menu. Only users in that security group will be able to check in content using this profile.
2. If accounts are in place, select the account from the menu for the Check In page. Only users with that account *and* in the security group specified in step 1 will be able to use this profile on the Check In page.
3. If roles are set up, select the role from the menu for the Check In page. Only users with that role *and* the account *and* in the security group specified in step 2 will be able to use this profile on the Check In page.

4. Limit access to the Search page by selecting the security group from the menu. Only users in that security group will be able to search for content using this profile.
5. If accounts are set up, enter the account name or select the account from the menu. Only users with that account *and* in the security group specified in step 4 will be able to use this profile on the Search page.
6. If roles are set up, select the role from the menu. Only users with that role *and* the account *and* in the security group specified in step 5 will be able to use this profile on the Search page.
7. When done, click **Save**. The next page in the profile creation process is displayed.

See "Using the Create/Update Profile Pages" on page 13-5 for details about moving fields into designated areas on this page. See "Saving, Resetting, and Exiting the Design Process" on page 13-6 for details about saving or resetting the page.

13.3.2.14 Setting the Search Order

Select **Search Order** from the Wizard Fields section on the Create/Update Simple Profile Page. The Simple Profile Search Order Page is displayed. Use this page to specify the criteria and order for Search fields. Move higher priority fields to the top of the Search Fields list.

1. Select the available fields and move them to the Search Fields box.

   When a search field is selected, it is listed in the Search Criteria section.
2. You can set the search order of fields by using the up or down arrow keys to assign a field a higher or lower sorting priority.
3. In the Search Criteria section, to sort a field by ascending order, select the box by the Search Field name. Fields are sorted in descending order by default.
4. When done, click **Save**.

   If no more modifications are needed to the profile, click **Exit Wizard**. The Simple Profile Information Page is displayed.

See "Using the Create/Update Profile Pages" on page 13-5 for details about moving fields into designated areas on this page. See "Saving, Resetting, and Exiting the Design Process" on page 13-6 for details about saving or resetting the page.

13.4 Administrative Profiles

Permissions: The Record Administrator or PCM Administrator role is required to create administrative profiles.

Users with administrative privileges can create personal profiles or can create profiles to be used by other Oracle URM users.

The process used to create administrative profiles is the same as that used to create user profiles. However, to create an administrative profile, select **Configure Retention Administration** from the **Administration** menu. Select **Configure** then **Simple Profiles** then the profile type. Profiles created in this manner appear on the check-in or search menus, where users can access them.

13.5 Profile Management

Keep the following points in mind when managing system and personal profiles created with the Simple Profiles component:

- A copied profile contains all of the information in the original profile. Make certain to change any labels, defaults, or security groups in the copied profile.
- All management functionality (updating, copying, deleting) is available from the Page menu bar on the Simple Profile Information Page and from the Actions menu for a profile.
- When creating a profile, if the wizard was exited before finishing the profile by using the **Exit Wizard** option, any changes made up to that point by using the Save button are saved. Tthe Reset button cannot be used to change them. Edit them using the Update Profile option. See "Saving, Resetting, and Exiting the Design Process" on page 13-6 for details.
- **Administrators Only:** If a profile is moved to the Content Profiles applet it can no longer be modified using Simple Profiles.
- **Administrators Only:** View the details of profiles created with Simple Profiles by using the Rules tab on the Configuration Manager applet. All of the rules created with Simple Profiles appear on that tab.

> **Caution:** Do not edit any rules created for a simple profile by using the Rules tab. Editing or deleting the rules invalidates the profiles.

13.5.1 Viewing Profile Information

Use this procedure to view information about system and personal profiles:

1. Access the Profile Listing Page.
2. Click the **Info** icon for the profile to view.
3. The Simple Profile Information Page is displayed, showing the details of the profile.

13.5.2 Updating a Simple Profile

Updating a simple profile involves accessing an existing profile and modifying, adding, or deleting information.

1. Access the Profile Listing Page.
2. Use one of the following methods to update information for the profile or its fields:
   - Click the Actions menu for the profile and select **Edit**, then **Update Profile** to access the Create/Update Simple Profile Page for the profile.
   - Click the Info icon for a profile to display the Simple Profile Information Page. From the Page menu select any of the Configure Fields or Configure Profile options to configure the profile.

     Also, from the Page menu bar a user can select **Edit**, then **Update Profile** to display the Create/Update Simple Profile Page.

Note: A profile can be updated by using the Actions menu or a profile's Page menu bar to select **Edit** then **Update Profile** to display the Create/Update Simple Profile Page. However, when the Update Content Profile page is saved it automatically starts the Wizard for modifying the profile configuration. If you do not want to use the Wizard, use the Page menu bar to directly select a profile configuration type to modify.

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3. When finished making changes to a profile, click **Save**.

13.5.3 Copying a Profile

Use this procedure to copy a system or personal profile:

1. Access the Profile Listing Page.
2. Click the Info icon for the profile to copy.

   The Simple Profile Information Page is displayed, showing the details of the profile.
3. On the Page menu bar select **Edit**, then select **Copy Profile**.

   The Copy Simple Profile Page is displayed.
4. Enter the new profile name and new display label.
5. Click **Copy** when done. To change edits, click **Reset** to clear the edits made.

   The Simple Profile Information Page is displayed for the newly copied profile.
6. Update the profile as needed using the instructions described in "Updating a Simple Profile" on page 13-13.

13.5.4 Deleting a Profile

Use this procedure to remove a system or personal profile. You must be an administrator to delete a system profile. You can delete your own personal profile.

1. Access the Profile Listing Page.
2. To delete a specific profile, use one of the following methods:
   - Click the Info icon for the profile to delete. The Simple Profile Information Page is displayed, showing the details of the profile. On the Page menu bar select **Delete Profile**.
   - Select the Actions menu for the profile and select **Delete Profile**.
   - Click **Delete** on any profile configuration page.

   A message is displayed, prompting to confirm the deletion.
3. Click **OK** to delete the profile, or click **Cancel** to retain the profile.

   The Profile Listing Page is displayed.

13.5.5 Moving a Profile

Follow this procedure to move a system profile to the Configuration Manager:

Important: If you move a system profile to the Content Profiles applet in the Configuration Manager, you can no longer modify or work with the profile using the Simple Profiles component. You must use the Configuration Manager Content Profiles functionality instead. Note that physical profiles cannot be moved.

1. Access the Profile Listing Page.
2. To move a system content profile to the Configuration Manager, use one of the following methods:
   - Click the Info icon for the system profile to be moved. The Simple Profile Information Page is displayed, showing the details of the system profile. On the Page menu bar select **Edit** then **Move to Configuration Manager**.
   - Click the Actions menu for the profile to move, then select **Edit** then **Move to Configuration Manager**.

   A message is displayed, prompting to confirm the move.
3. Click **OK** to move the profile, or **Cancel** to leave the profile as is.

   The Profile Listing Page is displayed.

13.5.6 Changing a Trigger Field (Administrators Only)

Use this procedure to modify the trigger field for content profiles:

1. Access the Profile Listing Page.
2. To change the trigger field for content profiles, on the page click **Configure Metadata Set**.

   The Simple Profile Information Page is displayed.
3. Select a different trigger field from the list and click **Save**.

   A confirmation prompt is displayed showing that the profiles configuration has been saved.
4. Click **OK**.

   The Profile Listing Page is displayed.

13.5.7 Troubleshooting (Administrators Only)

To temporarily disable the Simple Profiles component to resolve an issue, change the flag to the following setting in the \config\config.cfg file:

```
IsSimpleProfilesEnabled=false
```

A User Interface

This section contains information about the interface used with Oracle URM.

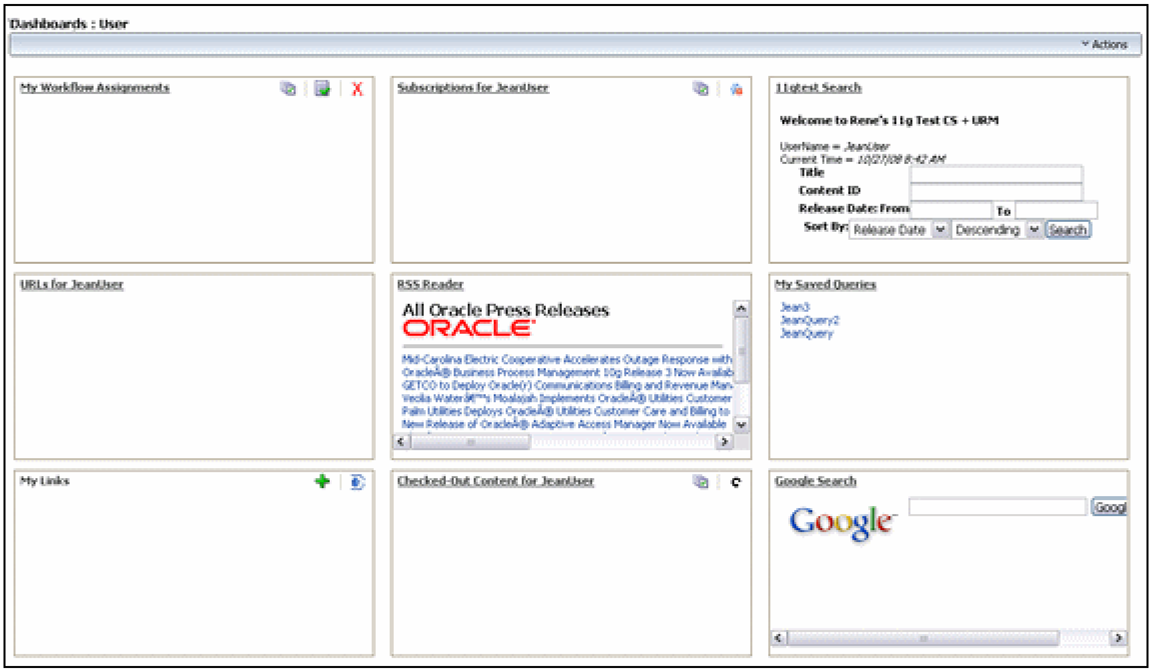
The following groups of screens are shown in this chapter:

A.1 Navigation Aids

The following screens can be used to quickly access parts of the interface.

A.1.1 User Dashboard Page

The dashboard is used to navigate quickly to different elements of the software. The following screen is the default User Dashboard. An Administrative Dashboard is also available.



To access this screen, click **Records** then **Dashboards** then **User** from the main menu.

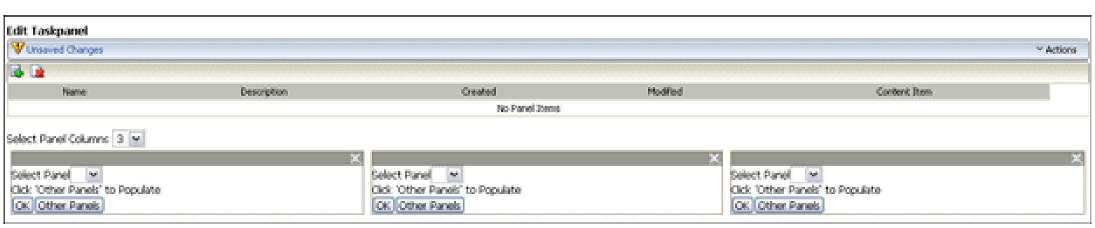
The elements on this screen will vary depending on the configuration of the system.

The following list describes the default task boxes:

- **My Workflow Assignments**: lists items assigned to the user in a workflow.
- **Subscriptions for <username>**: lists any items subscribed to by the user.
- **Default search panel**: displays a modified search panel for the main repository.
- **URLS for <username>**: displays any saved URLs.
- **RSS Reader**: displays the RSS feeds set up by the user.
- **My Saved Queries**: displays any saved queries created by the user. These include queries created using Oracle UCM or queries created using Oracle URM.
- **My Links**: displays any linked content.
- **Checked-Out Content**: displays a list of items checked out to the user.
- **Google search**: displays a search box for Google search.

A.1.2 Create/Edit Dashboard Page

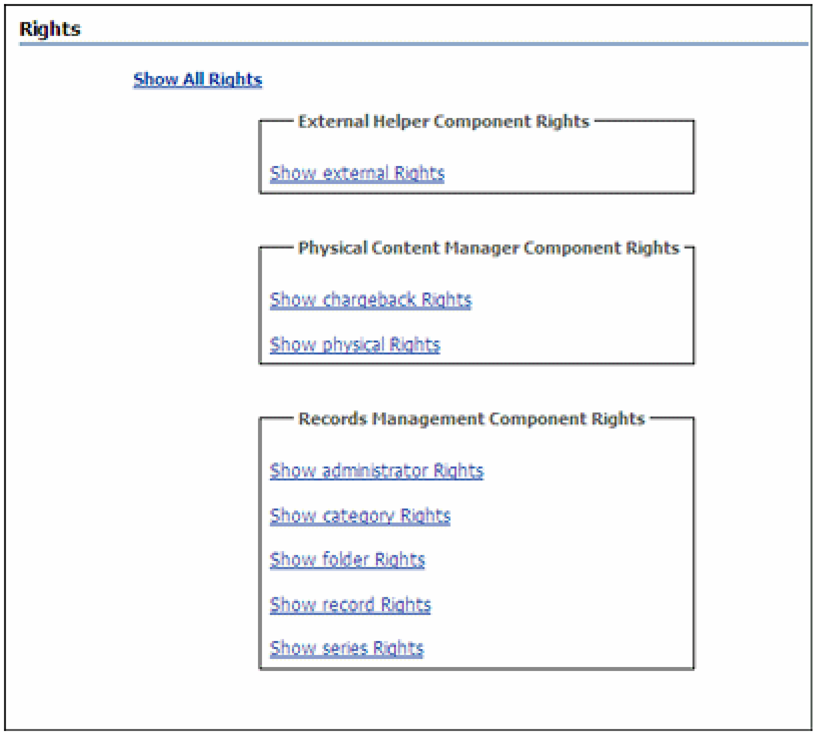
Use this page to create a new dashboard without basing the new dashboard on a previously created dashboard.



To access this page, click **Records** then **Dashboards** then **Create New** from the Top menu.

A.1.3 Assigned Rights Page

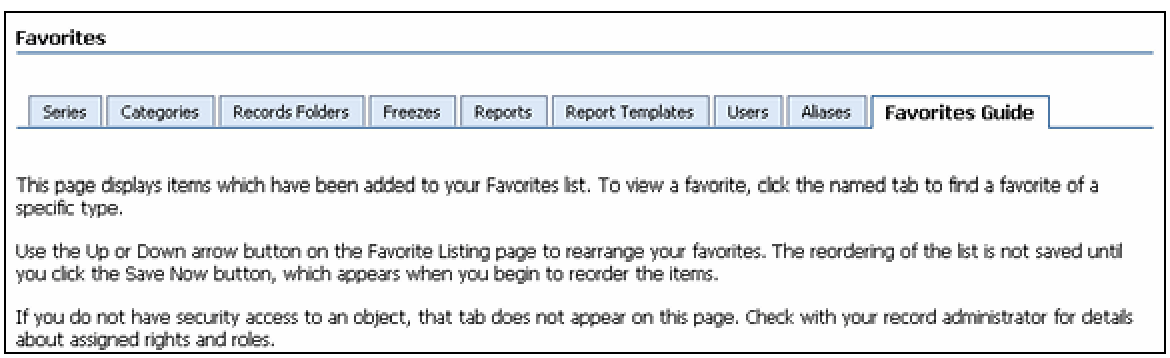
This screen displays assigned rights and roles for the logged-in user.



To access this screen, click **Records** then **Rights** from the Top menu. The sections are shown 'collapsed'. To expand a section, click the highlighted link.

A.1.4 My Favorites Screen

Use this screen to track the items marked for inclusion in a Favorites list.

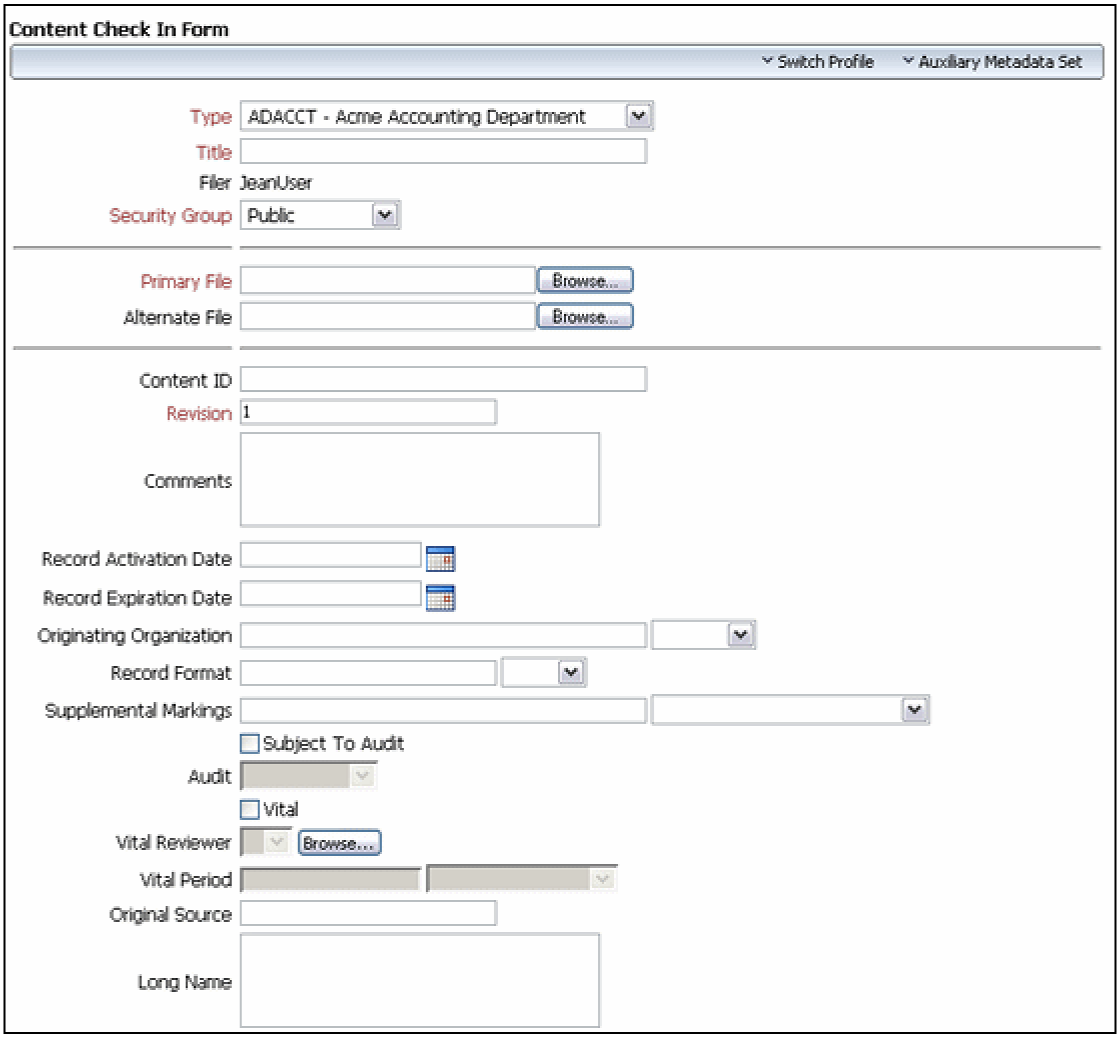


To access this screen, click **Records** then **Favorites** from the Top menu or click **My Content Server** then **My Favorites** from the Main menu.

To add items to these lists, on a listing page select the box next to an item and click **Add to Favorites**. If an item can be added, the **Add to Favorites** menu option is displayed on the listing page.

A.2 Content Check-In Page

The following is a partial view of a sample content Check In page. This page is used to add content to the repository. A similar page is used for searching the repository for content. Details specific to a search operation are included in the following information and are noted as such.



To access this page, click **New Checkin** from the Top menu. This screen can also be accessed from other points in the interface, such as from within a retention schedule when adding content to a schedule.

This screen may be customized to contain information specific to a particular company or organization. Other fields may also appear if specific components are enabled. In addition, profiles can be used to show or hide fields.

The follow subsections describe the information most commonly found on this screen. For details about customized fields, see the administrator of the site.

A.2.1 Check-In Page Metadata Fields

This section describes the metadata fields on a standard checkin page. Depending on a user's role and rights, the user may not see all the fields listed here.

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

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Type field</td><td>The type (department) of the file. Select from a list of predefined values.
This is required, but is pre-filled.</td></tr>
<tr><td>Title field</td><td>A descriptive name identifying the revision. Maximum length 80 characters. Required.</td></tr>
<tr><td>Filer field</td><td>The user who created or revised the content item. Required.
You may be able to select from a list of users. This value can be changed only if you have administrative permission.</td></tr>
<tr><td>Security Group field</td><td>The security group, which is a set of files with the same access permission. Required.Default: RecordsGroup.</td></tr>
<tr><td>Primary File field</td><td>The path and file name of the native file being checked in. Required.
■ 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.</td></tr>
<tr><td>Alternate File field</td><td>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 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.</td></tr>
<tr><td>Content ID field</td><td>The unique identifier for the content item. Required.
■ Duplicate names are not allowed.
■ Maximum length is 30 characters.
■ The following are not acceptable: spaces, tabs, line feeds, carriage returns, and symbols ; ^ ? : @ & + " # % < > * ~ |
Note: If a content ID is already filled in or if this field is not displayed, the system is configured to automatically generate content IDs.</td></tr>
<tr><td>Revision field</td><td>Revisions increment automatically with each check-in of the content item, so generally, do not change this value.</td></tr>
<tr><td>Comments field</td><td>Additional notes about the file. Maximum length is 255 characters.</td></tr>
<tr><td>Security Fields section</td><td>See "Security Fields" on page A-6 for details.</td></tr>
<tr><td>Subject to Review section</td><td>See "Subject to Review Fields" on page A-8 for details.</td></tr>
<tr><td>Correspondence Fields section</td><td>See "Correspondence Fields" on page A-8 for details.</td></tr>
</table>

Field	Description
Date fields section	See "Date, Format, and Audit Fields" on page A-6 for details.

A.2.1.1 Date, Format, and Audit Fields

Checkin forms may include the following data and format related fields:

Field	Description
Record Activation Date	The date a record is activated in the system.
Record Expiration Date	The date the record expires in the system.
Originating Organization	The official name or code identifying the office responsible for creating the record. The records administrator must populate this list. Maximum length: 100 characters.
Record Format	The format of the record. Options are designated by the site administrator.
Subject to Audit box	Specifies the record is subject to audit and is included in the indirect audit approval trigger. Selecting this box enables the audit period list. Clear the box if the record is not subject to the audit approval indirect trigger.
Audit period list	Period used for audits. Select the period from the list.
Category or Folder	The retention category or folder in which to file the item.

A.2.1.2 Security Fields

The following security-related fields may be included:

Field	Description
Supplemental Markings	One or more supplemental markings applied at the content level.
Security Classification	The current classification of the content item (denoted as "Current Classification" in the DoD 5015.2 specification). If No Markings is set as the lowest classification level in the system and if this field is set to No Markings, then no classification validation is performed.
Classifying Agency	The agency or person classifying the record. For example, an agency head, a corporate CEO, and so forth.
Classified By	Person classifying the item. This is required if **Classification Derived from** is not populated.
Classification Derived From	Classification guide(s) from which the classification of the item is derived. This is mandatory if the **Classified by** field is blank. Suggested values for the following fields are displayed automatically, but can be changed: ■ Initial classification ■ Reason(s) for classification ■ Declassify exemption category ■ Declassify on event ■ Declassify on date

Field	Description
Derived From Topic	Topic associated with a classification guide 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 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 the 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.
Declassify Exemption Category	A category that exempts the item from being declassified after the standard declassification period (as defined by the records administrator; typically 10 years). Examples are 'reveal an intelligence source', 'compromises corporate security', and so on.
Declassify on Event	An event triggering the declassification of an item automatically. Classified content requires **Declassify on event**, **Declassify on 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 about declassification, see the *Oracle Fusion Middleware Setup Guide for Universal Records Management*.
Declassify on Date	A date triggering the automatic declassification of an item. This can be entered automatically if the classification is derived from a source, multiple sources, or a topic. For information about declassification, see the *Oracle Fusion Middleware Setup Guide for Universal Records Management*.
Downgrade Instructions	Instructions on how content 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 content classification. For information on downgrading, see the *Oracle Fusion Middleware Setup Guide for Universal Records Management*.
Downgrade on Date	A date triggering the automatic downgrading of content classification. For information on downgrading records, see the *Oracle Fusion Middleware Setup Guide for Universal Records Management*.
Content Relations	Used to link items to each other. After inserting a link, it can be deleted by clicking the Delete icon (a red X).
Classification Guide Remarks	Text describing the classification guide usage.

Field	Description
Release Date	The date and time 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.
Expiration Date	The date and time the revision will no longer be available for viewing in the repository. ■ Upon expiration, the revision is not deleted. ■ If a value is entered, the date is required; the time is optional.

A.2.1.3 Subject to Review Fields

Check-in forms may include the following review-related fields:

Field	Description
Subject to Review	Indication the item is subject to review. Selecting this box enables the **Reviewer** and **Review Period** fields. Review items are defined by an organization as needing to be reviewed by a specified person within a specified time frame. Do not select the box if this is not considered an item that must be reviewed.
Reviewer	Reviewer, selected from the list. The reviewer list is a list of people, defined by a Records Administrator, who have access to this review item. The reviewer receives notifications.
Review Period	The period used for reviews, selected from the list.

A.2.1.4 Correspondence Fields

Check-in forms may include the following correspondence-related fields:

Field	Description
Is Correspondence	Additional metadata fields. Used if an item is an e-mail being checked in using Outlook Integration.
Author or Originator	Specifies from whom the e-mail was sent. If the **Is Correspondence** 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	The subject line of the original e-mail.
Email To Lists	Alias lists used in the original e-mail.
Received Date	The date an e-mail was received.
Publication Date	The date an e-mail was initially sent.

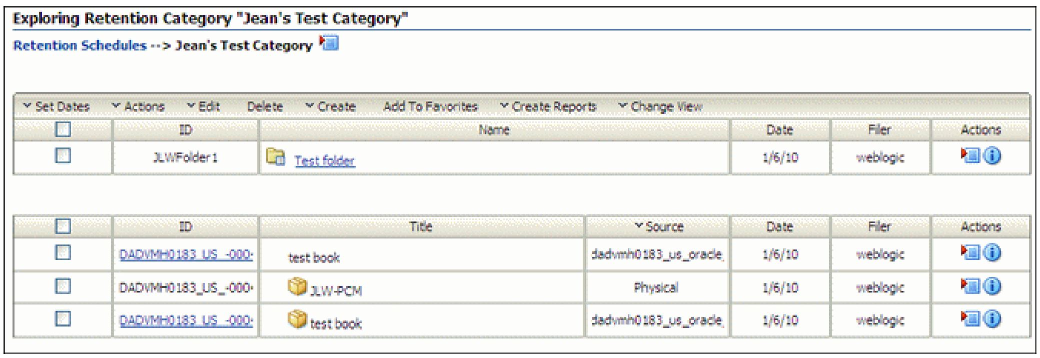
A.3 Browsing Interface

The following screens are used when browsing for content and retention schedules and storage.

- "Category or Series Content Page" on page A-9
- "Series Information Page" on page A-9
- "Disposition Information Page" on page A-10
- "Category Information Page" on page A-10

A.3.1 Category or Series Content Page

This page displays the content in a category. A similar page displays content in a series.

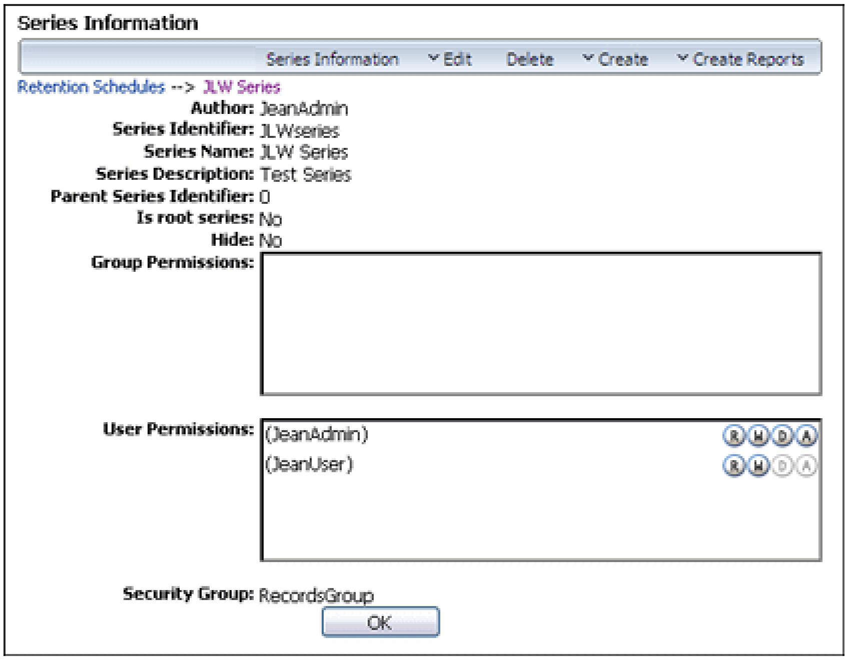


To access this page, click **Browse Content** then **Retention Schedules**. Click the name of a object in the list.

To display information about the category or series, click **Information** from the **Action** menu of an item and choose the type of information to view (category or series nformation, disposition information and metadata information if a category.)

A.3.2 Series Information Page

This page displays information about a series, including its retention schedule, identifier, and root status.

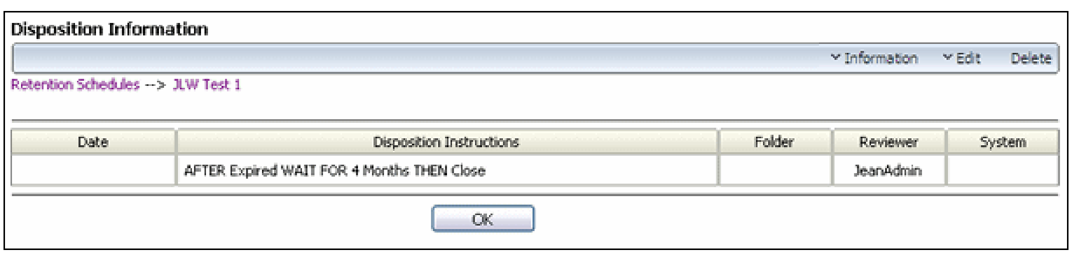


To access this screen, click **Browse Content** then **Retention Schedules**. The Exploring Series "Retention Schedules" Page is displayed. Navigate to the series to view. In the row for the series, click the **Info** icon or click **Series Information** from the item's **Action** menu.

Note that not all menu options appear on this screen for all users. The options depend on the rights assigned to a user.

A.3.3 Disposition Information Page

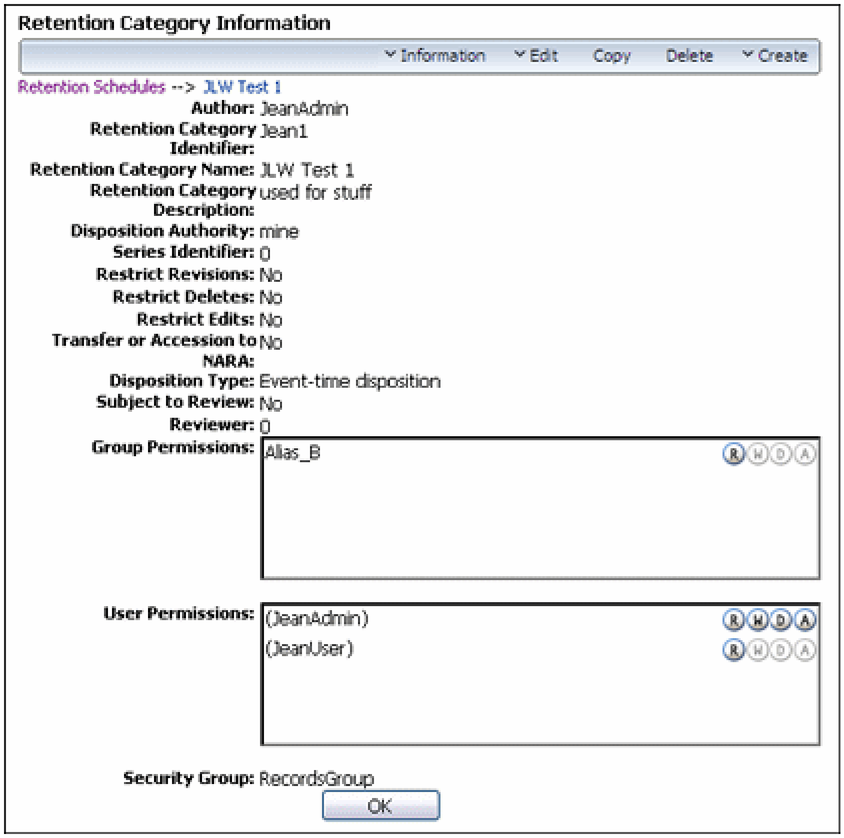
This page is used to view details about dispositions.



To access this screen, click **Browse Content** then **Retention Schedules**. The Exploring Series "Retention Schedules" Page is displayed. Navigate to the retention category whose dispositions to view. In the row for the category click **Information** then **Disposition Information** from the item's **Action** menu.

A.3.4 Category Information Page

This page is used to view details about categories. The information and menus on the page may differ depending on the metadata in use at a site and the permissions used to access the screen.

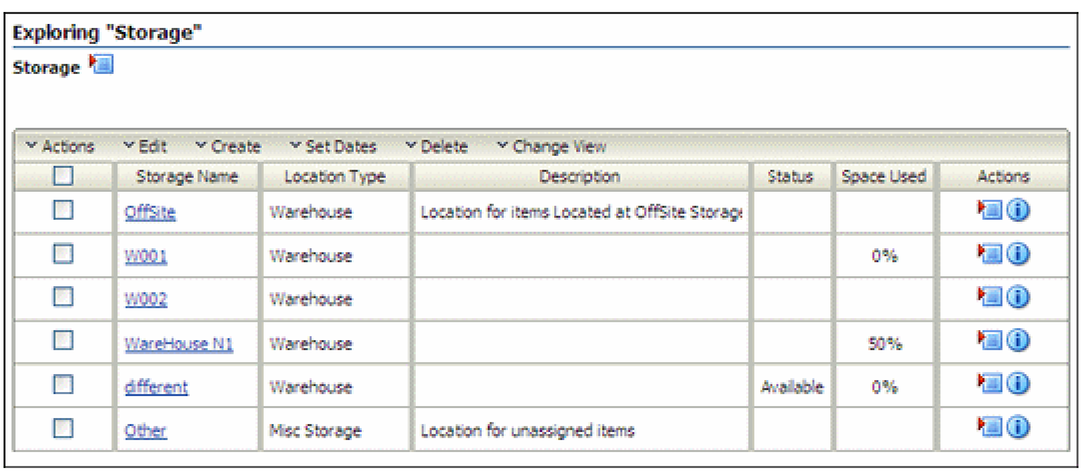


To access this screen, click **Browse Content** then **Retention Schedules**. The Exploring Series "Retention Schedules" Page is displayed. Navigate to the category to view. In the row for the category, click **Information** then **Category Information** from the item's **Action** menu.

Note that not all menu options appear on this screen for all users. The options depend on the rights assigned.

A.3.5 Exploring Storage Page

This page show defined storage locations. This page is only available in Physical Content Management.



To access this page, click **Physical** then **Storage** from the Top menu.

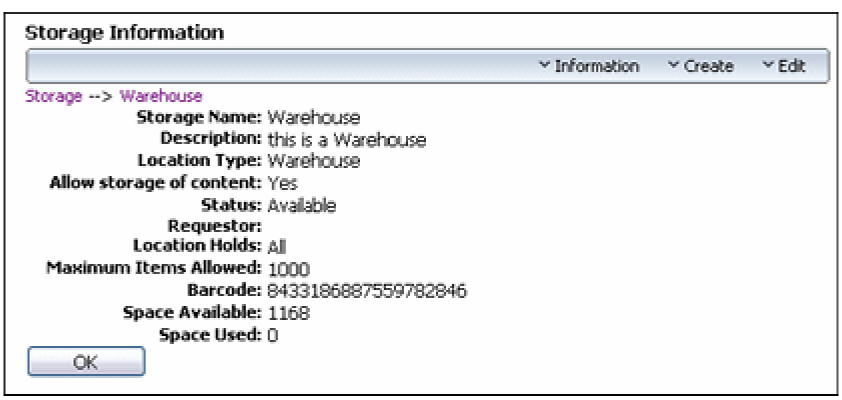
Note that not all menu options appear on this screen for all users. The options depend on the rights assigned.

The Exploring Page for the top level (called "Storage") is displayed.Use the links on this page to navigate within the storage space hierarchy.

Element	Description
Storage Name	The name of the storage location. Click the link to display a new Exploring Page which lists the storage locations contained in the selected storage location. This functionality enables a user to move down to the lower levels of the storage space hierarchy.
Location Type	The type of the storage location. The available location types are defined by an administrator.
Description	The description of the storage location, as specified when the location was defined.
Status	The current status of the storage location. A status is displayed only for storage locations that can hold content items. If a storage location cannot hold content at that level, the status column is empty.
Space Used	The occupancy percentage of the storage location and all its children. For example, 25% indicates one-quarter of the maximum allowed number of items that can be stored in the storage location (and all its children) is currently assigned to the location.
Action Menu	The available menu options depend on the storage location in the row, and may include: ■ **Storage Information**: Displays the Storage Information Page. ■ **Create Physical Item**: Create an item to store in that location. ■ **Edit**: Edit information about the storage location. ■ **Reports**: Displays a menu of reports that can be created.

A.3.6 Storage Information Page

This page is used to view information about an existing storage location.



To access this page, click **Physical** then **Storage** from the Top menu. The Location Page for the top level of the storage hierarchy is displayed.

Navigate to the storage location. Click **Information** then **Storage Information** from the item’s **Action** menu.

A storage location’s ability to hold content depends on its assigned Location Type and applies to that particular level only. For example, in the default hierarchy, shelves have several positions, each of which can hold content items, but no content items can be directly assigned to the shelf level (only to the positions on a shelf). Therefore, the location type 'Shelf' cannot store content, whereas the type 'Position' can.

> **Important:** By default, the available storage space is recalculated daily at midnight. Therefore, the displayed storage availability information may not be entirely up to date as the day progresses since it still reflects the situation from the night before. The administrator may force a recalculation of the storage space availability at any time.

A.4 Content Information Page

The Content Information Page displays detailed information about content. The information displayed depends on the configuration of the system and may vary from the screens depicted here. To access this page, click **Content Information** from the **Action** menu for an item on a Search Result Page.

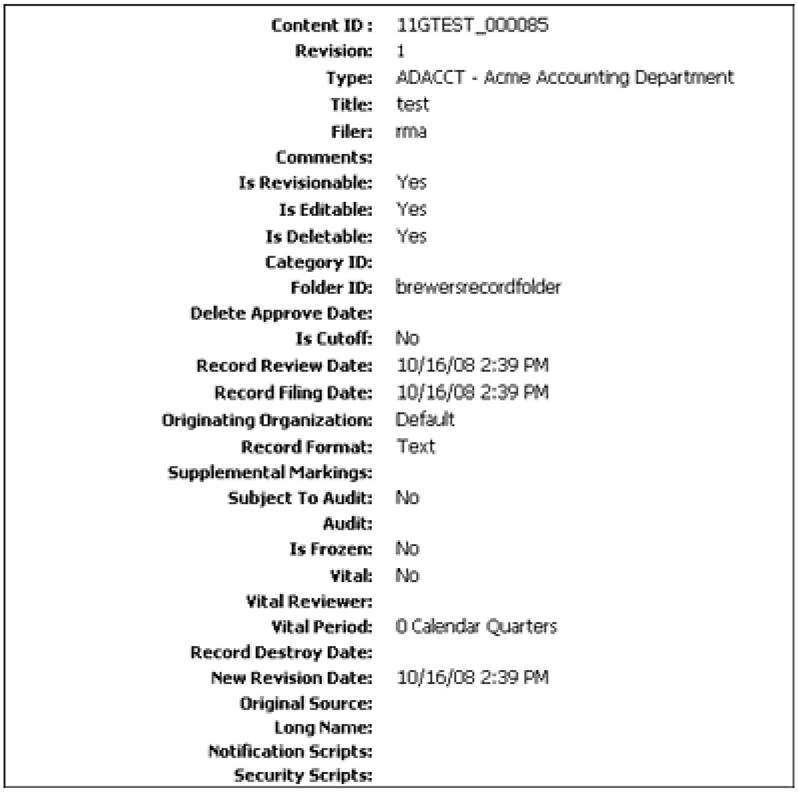
For details about the fields on this page, see the "Content Check-In Page" on page A-4.

The page contains several distinct areas:

- "Content Information Section" on page A-13
- "Correspondence Fields Section" on page A-14
- "Links Area" on page A-14
- "Revision History Section" on page A-15

A.4.1 Content Information Section

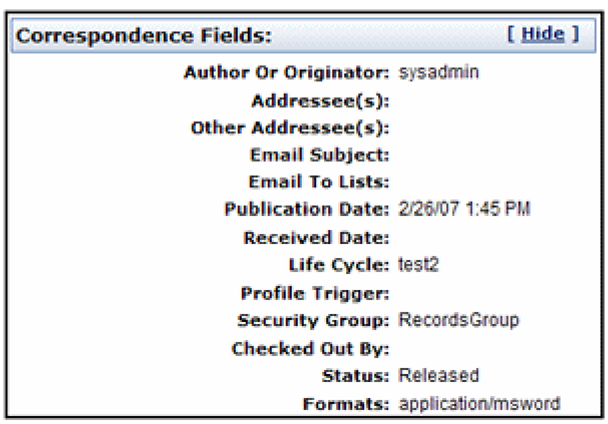
This area provides filing information about the retained item, including content ID, title, filer, and publication date. For further details on the standard content information metadata, see the *Oracle Fusion Middleware User's Guide for Content Server* and online help system.



Content ID :	11GTEST_000085
Revision:	1
Type:	ADACCT - Acme Accounting Department
Title:	test
Filer:	rma
Comments:	
Is Revisionable:	Yes
Is Editable:	Yes
Is Deletable:	Yes
Category ID:	
Folder ID:	brewersrecordfolder
Delete Approve Date:	
Is Cutoff:	No
Record Review Date:	10/16/08 2:39 PM
Record Filing Date:	10/16/08 2:39 PM
Originating Organization:	Default
Record Format:	Text
Supplemental Markings:	
Subject To Audit:	No
Audit:	
Is Frozen:	No
Vital:	No
Vital Reviewer:	
Vital Period:	0 Calendar Quarters
Record Destroy Date:	
New Revision Date:	10/16/08 2:39 PM
Original Source:	
Long Name:	
Notification Scripts:	
Security Scripts:	

A.4.2 Correspondence Fields Section

This area provides information about the content item's author along with various related addresses and additional information about the current status of user accesses.

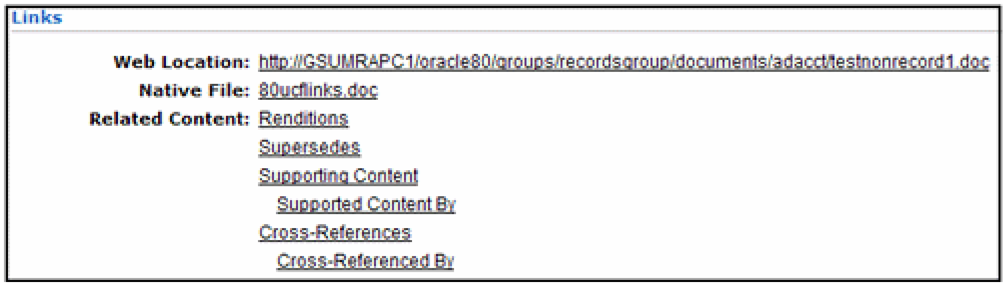


Correspondence Fields: [Hide]

Author Or Originator:	sysadmin
Addressee(s):	
Other Addressee(s):	
Email Subject:	
Email To Lists:	
Publication Date:	2/26/07 1:45 PM
Received Date:	
Life Cycle:	test2
Profile Trigger:	
Security Group:	RecordsGroup
Checked Out By:	
Status:	Released
Formats:	application/msword

A.4.3 Links Area

This area provides links to the native file, a web-viewable rendition and to retention-related links if any exist.

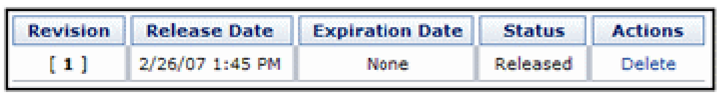


When initially shown, the Related Content links are 'collapsed' and can be expanded by clicking the main link.

If a link contains other links, a plus sign is displayed next to the link.

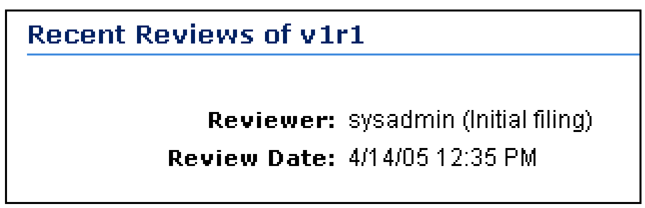
A.4.4 Revision History Section

This area provides release information about the current retained item.



A.4.5 Recent Reviews of a Retained Item

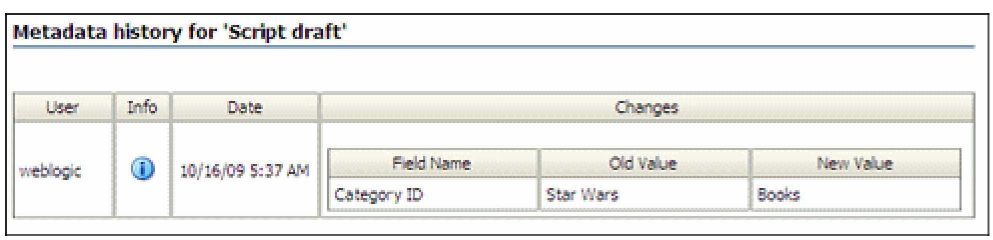
This screen displays the recent reviews of a retained item.



To access this information, locate the item either by browsing or searching. On the Search Results Page, click **Recent Reviews** in the item's **Action** menu.

A.4.6 Metadata History

This screen shows the metadata history of a content item.

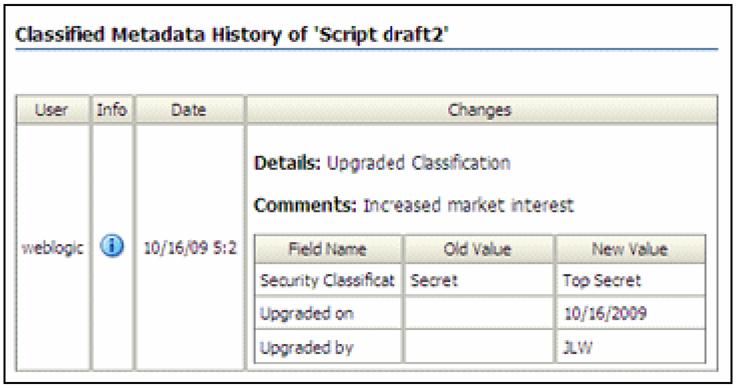


Permissions: The Records Administrator role is required to use this page.

To access this screen, locate the item either by browsing or searching. On the Search Results Page, click **Metadata History** in the item's **Action** menu.

A.4.7 Classified Metadata History Page

This screen shows all changes made to the security classification of a record.

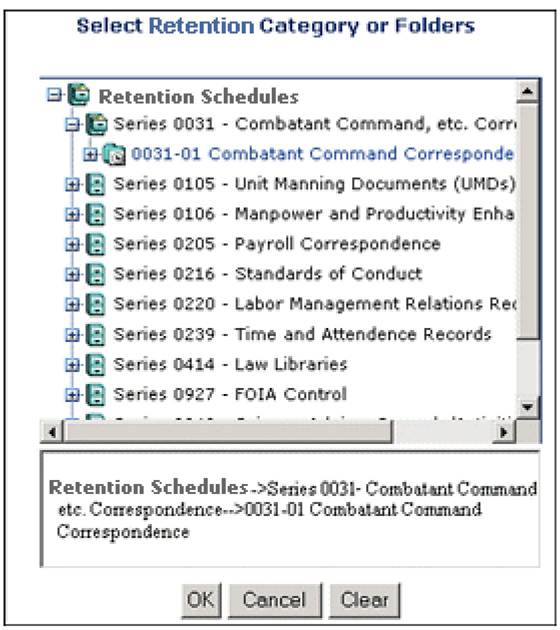


Permissions: The Records Administrator role is required to use this page.

To access this screen, locate the item either by browsing or searching. On the Search Results Page, click **Classified Metadata History** in the item's **Action** menu.

A.4.8 Select Category or Folder Dialog

This dialog is displayed when selecting a category or folder for use.



For example, this dialog appears when a user checks in a content item and click **Browse** to choose a category into which the content item will be filed. To use a category or folder, highlight the object and click **OK**.

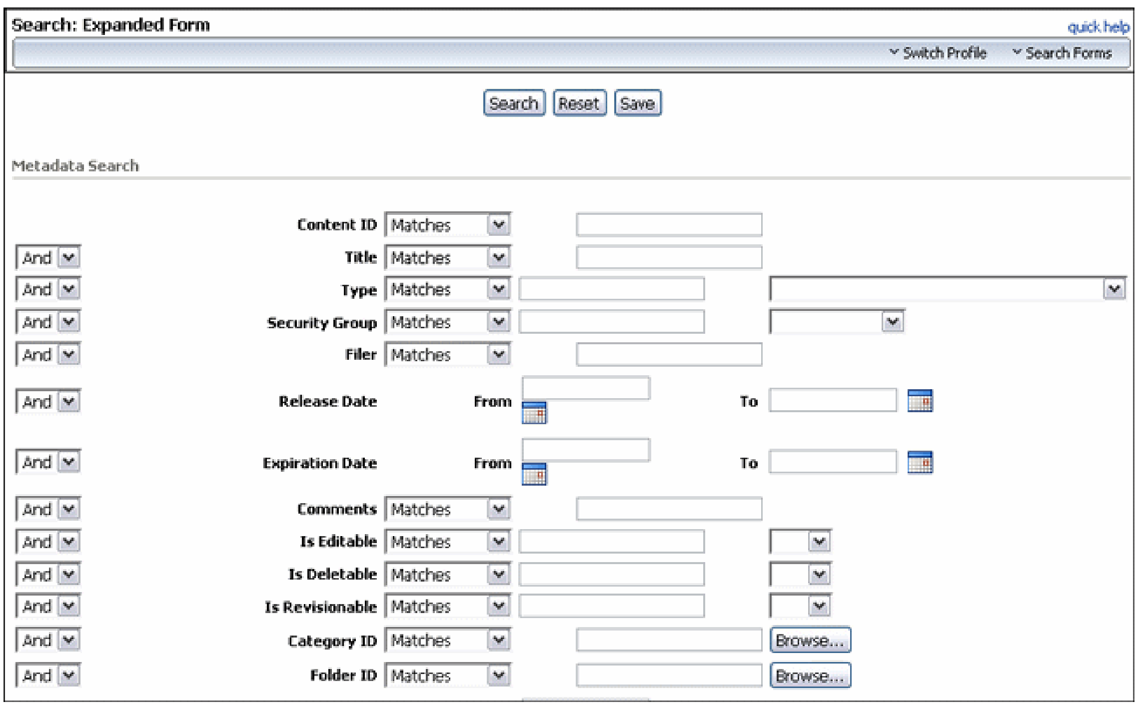
A.5 Searching and Screening Interface Pages

The following pages are used when performing screenings:

- "Standard Search Page" on page A-17
- "Search Physical Items Page" on page A-17
- "Search Results Page" on page A-19
- "Screen for topic Page" on page A-19
- "Schedule Screening Report Page" on page A-22
- "Default Metadata for Checked-In Screening Reports Page" on page A-22
- "Screening Results Page" on page A-24

A.5.1 Standard Search Page

This page is used to search for content. A partial page is depicted here.



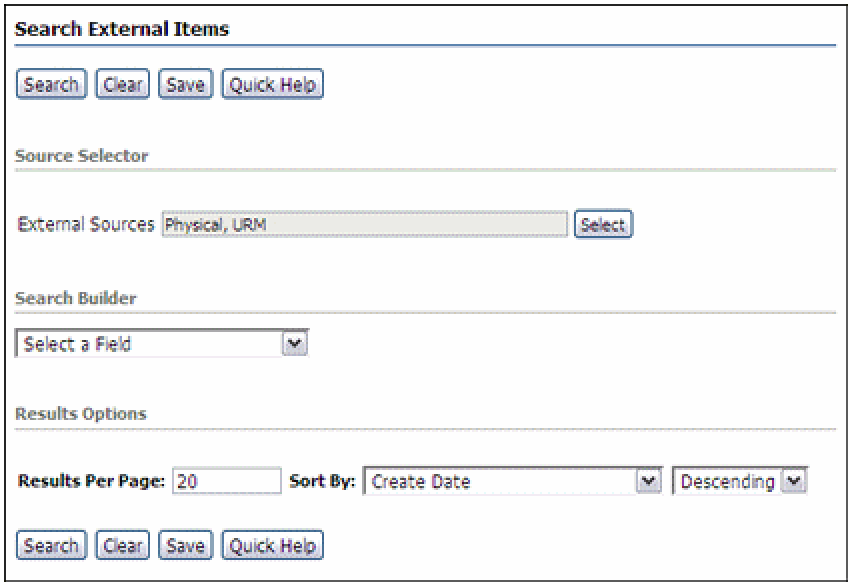
The fields in use on this screen vary depending on the fields in use at individual sites.

When searching folders, it is best to use 'Substring' as an operand instead of 'Matches'. Using the 'Matches' operand narrows the search results considerably. Using 'Substring' returns all internal content items as expected.

See the *Oracle Fusion Middleware User's Guide for Content Server* for details about using the Standard Search functionality.

A.5.2 Search Physical Items Page

Use the Search Physical Item Page to construct a query to search for an item.

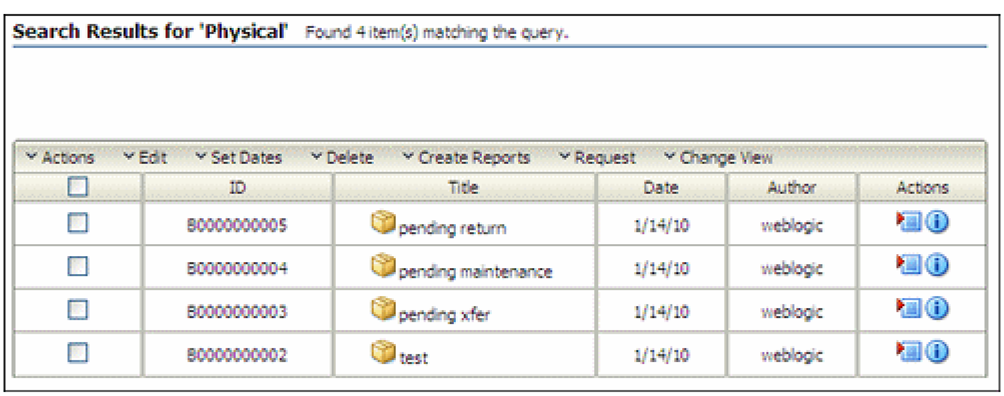


To access this page, click **Search** then **Physical** from the Top menu.

Element	Description
Source Selector	A dropdown list of sources that can be used. These include external repositories available through adapters as well as the local physical and Oracle URM systems.
Search Builder	A list of fields that can be used for searching.
Results section	A section containing the number of results per page (default: 20), fields which can be used for sorting, and the sorting order (Ascending or Descending).
Search button	Initiates the search process.
Clear button	Resets the page to the initial defaults.
Save button	Prompts to save the query under a query name. Once saved, the query is available in the **My Saved Query** section of the **My Content Server** menu.

A.5.3 Physical Search Results Page

This page is displayed after searching for physical items.

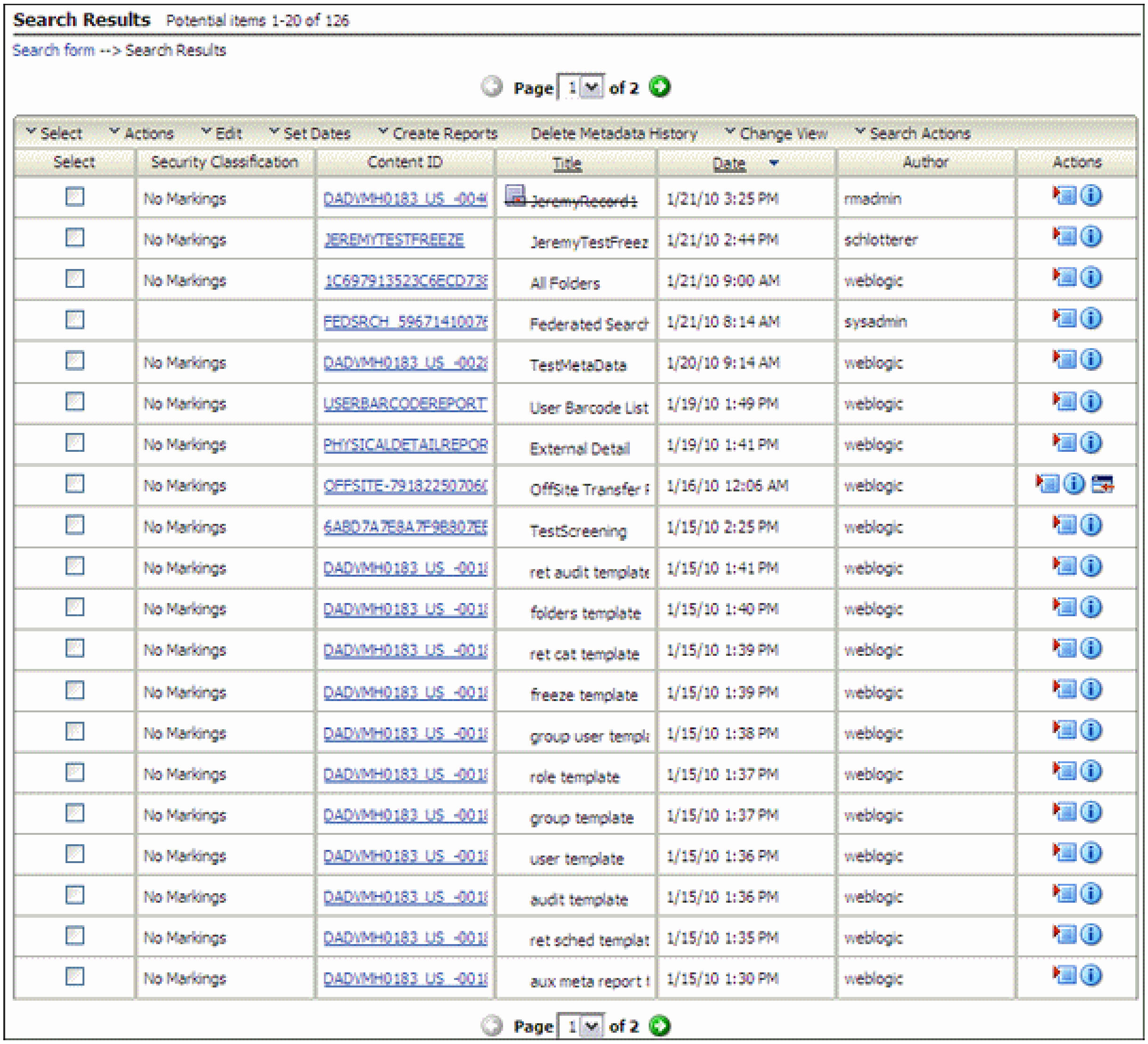


To access this screen, click **Search** on a search or screening page for physical items.

Note that not all menu options appear on this screen for all users. The options depend on the rights assigned.

A.5.4 Search Results Page

This page is displayed after searching for content.



Search Results Potential items 1-20 of 126

Search form --> Search Results

Page 1 of 2

Select | Actions | Edit | Set Dates | Create Reports | Delete Metadata History | Change View | Search Actions

Select	Security Classification	Content ID	Title	Date	Author	Actions
	No Markings	DADVMH0183_US_004(	~~JeremyRecord1~~	1/21/10 3:25 PM	rmadmin	
	No Markings	JEREMYTESTFREEZE	JeremyTestFreez	1/21/10 2:44 PM	schlotterer	
	No Markings	1C697913523C6ECD73	All Folders	1/21/10 9:00 AM	weblogic	
		FEDSRCH_5967141007	Federated Search	1/21/10 8:14 AM	sysadmin	
	No Markings	DADVMH0183_US_002	TestMetaData	1/20/10 9:14 AM	weblogic	
	No Markings	USERBARCODEREPORT	User Barcode List	1/19/10 1:49 PM	weblogic	
	No Markings	PHYSICALDETAILREPOR	External Detail	1/19/10 1:41 PM	weblogic	
	No Markings	OFFSITE-791822507060	OffSite Transfer F	1/16/10 12:06 AM	weblogic	
	No Markings	6ABD7A7E8A7F9B807EE	TestScreening	1/15/10 2:25 PM	weblogic	
	No Markings	DADVMH0183_US_001	ret audit template	1/15/10 1:41 PM	weblogic	
	No Markings	DADVMH0183_US_001	folders template	1/15/10 1:40 PM	weblogic	
	No Markings	DADVMH0183_US_001	ret cat template	1/15/10 1:39 PM	weblogic	
	No Markings	DADVMH0183_US_001	freeze template	1/15/10 1:39 PM	weblogic	
	No Markings	DADVMH0183_US_001	group user templ	1/15/10 1:38 PM	weblogic	
	No Markings	DADVMH0183_US_001	role template	1/15/10 1:37 PM	weblogic	
	No Markings	DADVMH0183_US_001	group template	1/15/10 1:37 PM	weblogic	
	No Markings	DADVMH0183_US_001	user template	1/15/10 1:36 PM	weblogic	
	No Markings	DADVMH0183_US_001	audit template	1/15/10 1:36 PM	weblogic	
	No Markings	DADVMH0183_US_001	ret sched templat	1/15/10 1:35 PM	weblogic	
	No Markings	DADVMH0183_US_001	aux meta report	1/15/10 1:30 PM	weblogic	

Page 1 of 2

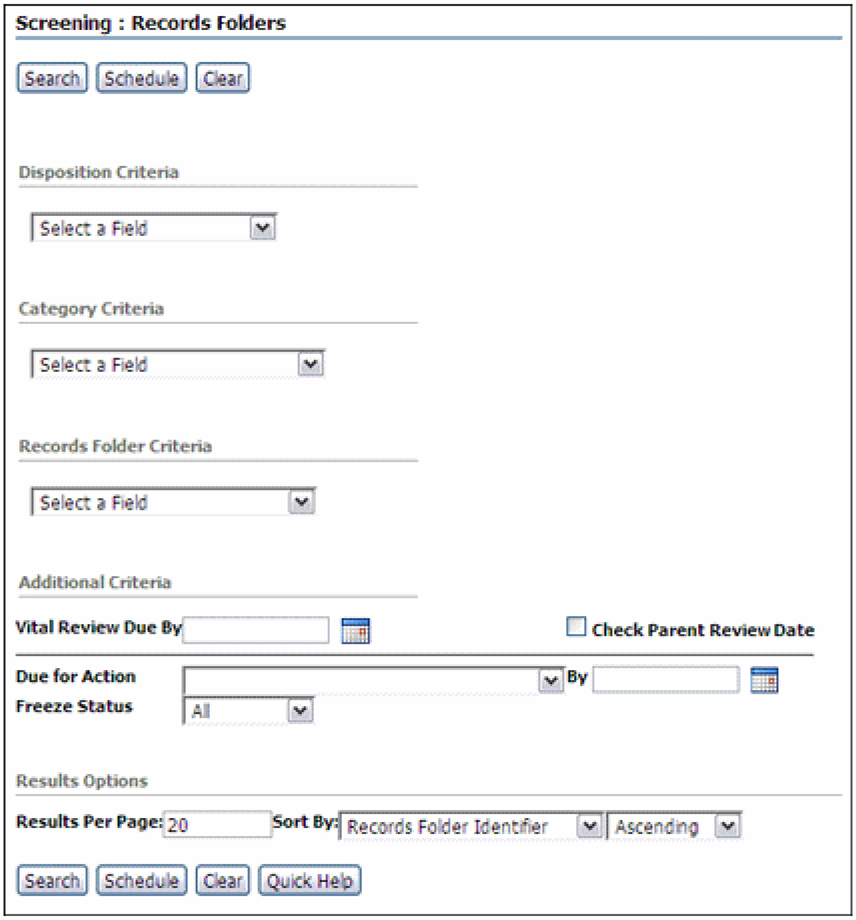
To access this screen, click **Search** on a search or screening page.

Note that not all menu options appear on this screen for all users. The options depend on the rights assigned.

A.5.5 Screen for *topic* Page

To access any screening page, click **Search** then **Screening** then the type of screening from the Top menu.

The following is a sample screening page. The actual page varies depending on the type of screening selected (Categories, Records Folders, or Content and Records) and on the metadata fields in use at the site.



- The **Criteria** menus are used to select fields for use in the query. After a field is selected for use, additional menus are available to further refine the criteria.
- When screening content and records, the **Update Sort Fields** button is displayed. This opens a dialog where the user can select mulitple fields to use for sorting. For each field selected and moved to the **Search Fields** box, a checkbox appears below the fields section. Check the box to further refine if the sorting for that field should be in ascending order. If not checked, sort order is descending.
- To screen for content items due for review, indicate a review date by which the review must be performed in the **Review Due By** box. If the retention schedule has nested folders or retention categories with differing review periods than their child record folders, select the **Check Parent Review Date** to ensure the screening encompasses all review dates in its search.
- Use the **Due for Action** fields to screen for content items due for processing of a specific disposition action on a specific date.
- Use the **Freeze Status** field to limit the screening to content that is frozen, non-frozen, or either. When screening for frozen items, the screening results contain frozen items and those inheriting their freeze status from their parent. However, if the category to which the item belongs has an empty disposition, the frozen item will not appear in the screening results. If the screening results should include only items that are themselves frozen and not those that inherit their freeze status, use the **Is Frozen** field.
- Click **Search** without entering any criteria to return all items in the selected object (folder, retention schedule, and so on).

- The items displayed in the results page are those that a user is authorized to access.
- Boolean operators can be used to combine fields. Click the insert symbol (a plus sign) to access a menu of Boolean operators. Click the remove symbol (a lowercase 'x') to clear previous selections.
- Additional wildcard search operators, such as **Matches** and **Substring**, enable further flexibility in screening.

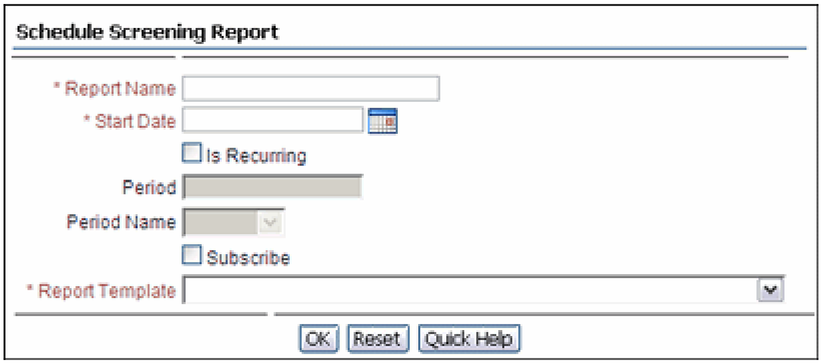
Criteria Definition	Description
Search button (top and bottom of page)	Searches, or "screens" for the content meeting the criteria.
Schedule button (top and bottom of page)	Schedules the creation of the screening report.
Clear button (top and bottom of page)	Clears all of the Criteria boxes of screening criteria query selections. To clear only a particular Criteria box, click the Remove symbol corresponding to the Criteria box.
Disposition Criteria	Displays options on a Disposition Criteria menu.
Retention Category Criteria	Displays options on a Retention Category menu.
Record Folder Criteria	Displays options on a Record Folder menu.
Content Criteria	Displays options specific to searching for content.
Review Due By (Folders screen and Content screen only)	Screens for content items with an impending review if a due date for the review is entered.
Check Parent Review Date box (Folders screen and Content screen only)	Screens using all review dates in the search. If the retention schedule does not have differing review periods between categories and any nested record folders, it is probably not necessary to select this box.
Due for Action (By date)	Select a disposition action for which content items are due and indicate the due date for the action.
Freeze Status	Selects a freeze status for the screening criteria: ■ **All**: (**default**) Results return frozen and unfrozen items. ■ **Frozen**: Results return only frozen items. ■ **Not Frozen**: Results return only items not frozen. You can also screen for items frozen with a specific freeze from the Actions menu on the Freeze Information Page of the freeze.

Result Options	Description
Sort By attribute list	Selects one or more attributes by which to sort the results. The list contains all of the screening criteria options.
Sort order list	Specifies the sort order of the screening results: ■ **Descending**: (**default**) Sorts alphabetical results in Z-A order, numeric results in 9-0 order and date results in newest to oldest order. ■ **Ascending**: Sorts alphabetical results in A-Z order, numeric results in 0-9 order, and date results in oldest to newest order.
Add button	Adds the Sort By attribute and order to the Sort By list.

Result Options	Description
Clear button (sort order)	Clears sorting criteria from the Sort By box.
Results Per Page	Specifies the maximum number of results displayed on each screening results page. **Default: 20**. Valid range: 0 to 100.

A.5.6 Schedule Screening Report Page

Use this screen to define the attributes of a scheduled screening report.



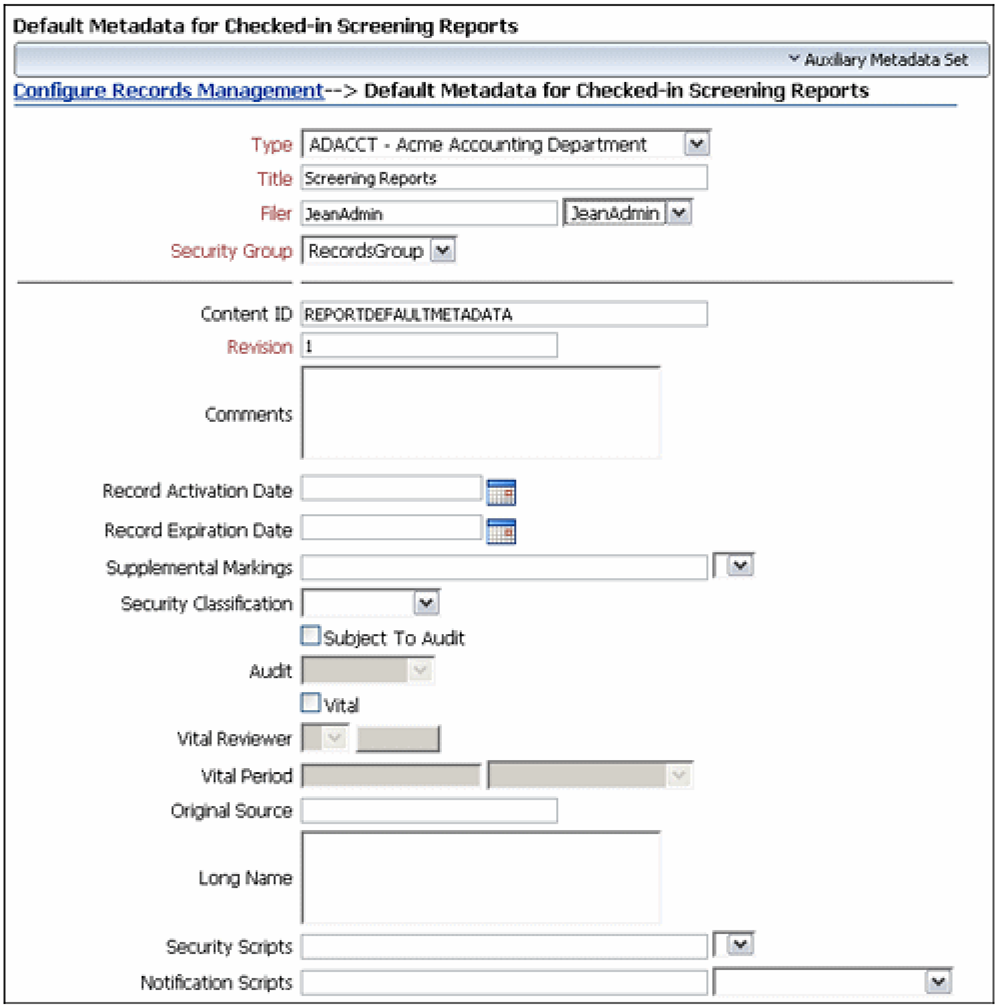
To access this page, click the **Schedule** button on the Screen for topic Page.

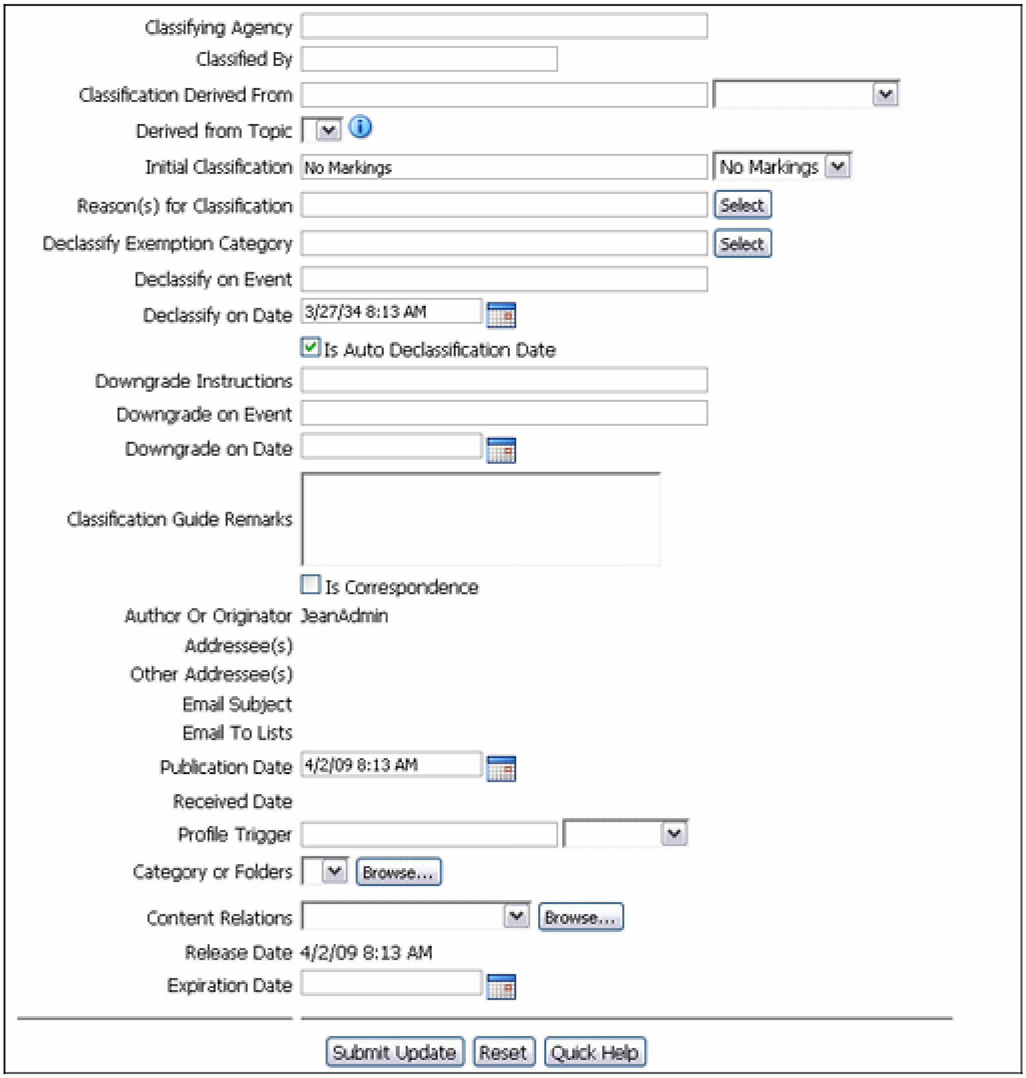
Permissions: You must have Records Administrator privileges to use this page.

Element	Description
Report Name field	Name for the scheduled screening report. Required.
Start Date field	The date the scheduled screening report will be generated. Required. If the screening report is recurring, the first screening report is generated for the first time on this date and subsequent reports at the end of each recurring period after this date. If the start date is in the past, the processing is done with the next scheduled run.
Is Recurring box	Indicator of recurrence. If checked, the scheduled screening report is generated periodically.
Period and Period Name fields	The interval at which the recurring screening report is created (for example, every 2 weeks).
Subscribe	After the report is created, it is checked into the repository. Click Subscribe to subscribe to it and be notified when the report changes.
Report Template	Choose a template from the list for formatting the report.

A.5.7 Default Metadata for Checked-In Screening Reports Page

The following screens comprise the Default Metadata for Checked-In Screening Reports page. The screens in use at a site may differ from those shown here because of configuration differences. The top half and the bottom half of the screens are shown here. You must have the Records Administrator privileges to access this screen.


Default Metadata for Checked-in Screening Reports
Auxiliary Metadata Set
Configure Records Management--> Default Metadata for Checked-in Screening Reports
Type
ADACCT - Acme Accounting Department
Title
Screening Reports
Filer
JeanAdmin
JeanAdmin
Security Group
RecordsGroup
Content ID
REPORTDEFAULTMETADATA
Revision
1
Comments
Record Activation Date
Record Expiration Date
Supplemental Markings
Security Classification
Subject To Audit
Audit
Vital
Vital Reviewer
Vital Period
Original Source
Long Name
Security Scripts
Notification Scripts



Permissions: The Records Administrator role is required to use this page.

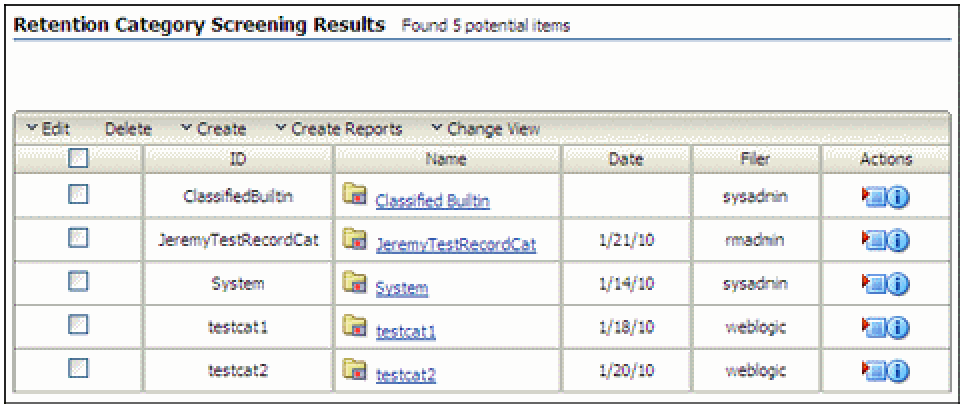
Use this page to define the default metadata for checked-in screening reports. To access this page, click **Records** then **Configure** from the Top menu. Click **Metadata** then **Screening Metadata Defaults**.

After entering the defaults, click **Submit Update**.

The fields on this page are the same as those on the Content Check-In Page.

A.5.8 Screening Results Page

Use this page to view the results of screening criteria.



Note that not all menu options appear on this screen for all users. The menu options depend on the rights assigned. In addition, different menu options appear depending on the type of sceening performed.

This page is displayed after clicking **Search** on the Screen for topic Page. The results that are displayed depend on the type of search done.

> **Tip:** You can save the screening query so it appears in your saved query list under **My Content Server**. You can then perform the query later without having to go through screening pages. To save the query, click **Query Actions** then **Save Search** on the table menu above the screening results list.

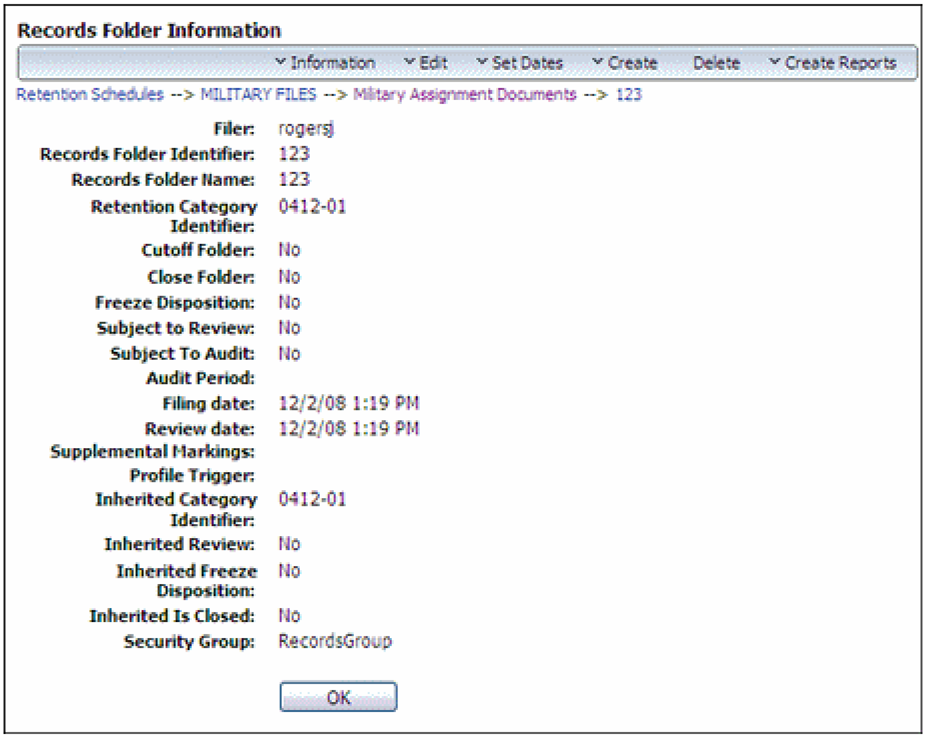
A.6 Record Folder Interface Screens

The following screens are used when managing record folders.

- "Record Folder Information Page" on page A-25
- "Life Cycle of Record Folder Page" on page A-26
- "Folder Review History Page" on page A-27
- "Folder Metadata History Page" on page A-27
- "Freeze Details Page" on page A-28
- "Freeze/Unfreeze Dialog" on page A-28
- "Create or Edit Record Folder Page" on page A-29

A.6.1 Record Folder Information Page

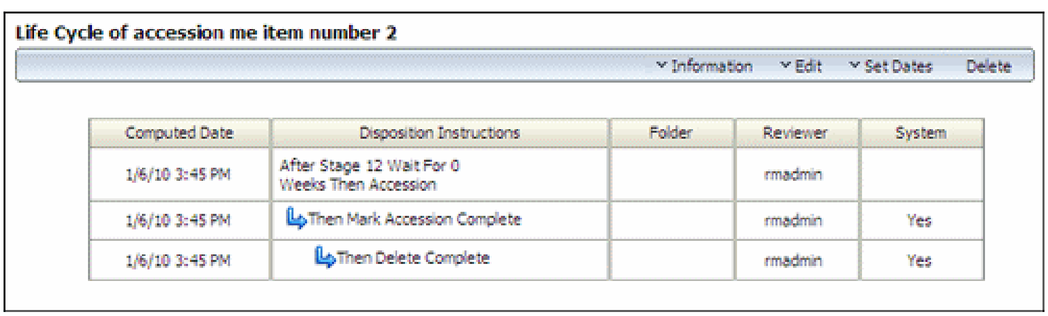
This page displays basic information about a folder.



To access this page, click **Browse Content** then **Retention Schedules** from the Main menu. The Exploring Series "Retention Schedule" Page is displayed. Navigate to the record folder to use. In the row for the record folder, click **Information** then **Folder Information** from the item's **Action** menu.

A.6.2 Life Cycle of Record Folder Page

Use this screen to view details about a folder's life cycle. The page shows the complete life cycle of the record folder according to its scheduled disposition, including the calculated dates of each disposition action.



Permissions: The Folder.Read right is required to use this screen. All predefined management roles have this right.

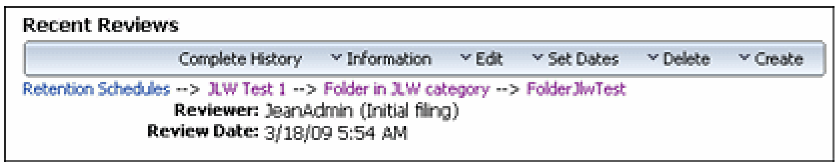
To access this screen, click **Browse Content** then **Retention Schedules**. Navigate to the record folder to use. In the row for the record folder, click **Information** then **Life Cycle** on the folder's **Action** menu.

Note that not all menu options appear on this screen for all users. The menu options depend on the rights assigned.

Element	Description
Computed Date	The date when the disposition has been or will be processed.
Disposition Instructions	The instructions used for the disposition of the folder.
Folder	Any sub-folders affected.
Reviewer	The reviewer responsible for reviewing the disposition.
System	An indication if the system will perform the disposition (for example, delete an item).

A.6.3 Folder Review History Page

This page shows the review history of a record folder, including the name of the reviewer and the review date.



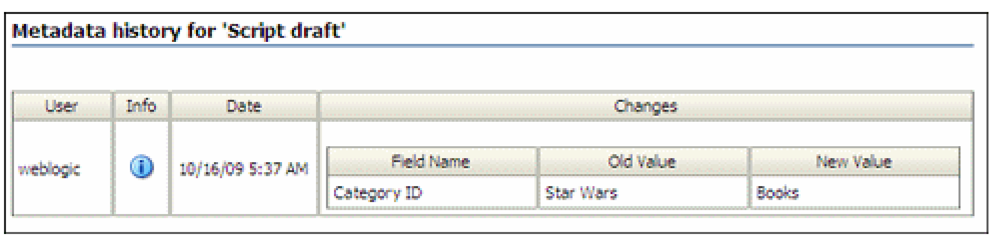
Permissions: The Folder.Read right is required to use this screen. All predefined management roles have this right.

To access this screen, click **Browse Content** then **Retention Schedules**. Navigate to the record folder to use. In the row for the record folder, click **Information** then **Recent Reviews** from the item's **Action** menu.

Note that not all menu options appear on this screen for all users. The menu options depend on the rights assigned.

A.6.4 Folder Metadata History Page

Use this page to view the metadata history of a record folder.



Permissions: The Folder.Read right is required to use this screen. All predefined management roles have this right.

To access this screen, click **Browse Content** then **Retention Schedules**. Navigate to the record folder to use. In the row for the folder, click **Information** then **Metadata History** from the item's **Action** menu.

The page shows an overview of all changes made to the editable properties of the record folder, and the affected metadata field name, the modification date and time, and the old and new values for the metadata fields associated with the folder.

A.6.5 Freeze Details Page

This page shows all freezes currently applied to the record folder. If the folder inherited its freeze status from a parent folder, that folder's name is shown in the **Inherited From** column for the freeze that was inherited.

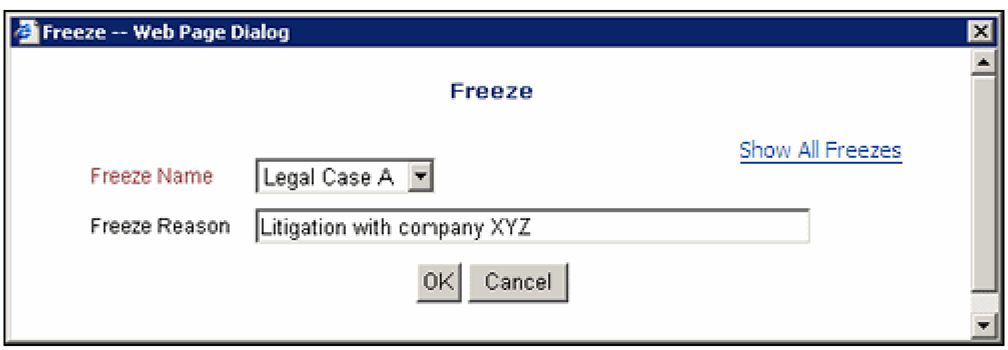
Permissions: The Folder.Read right is required to use this page. All predefined records management roles have this right.

To access this page, click **Browse Content** then **Retention Schedules**. Navigate to the record folder to use. In the row for the record folder, click **Information** then **Freeze Details** from the item's **Action** menu.

If the record folder is frozen, the Freeze Disposition field value is 'Yes' and a **Details** hyperlink is displayed next to the field value. Click the **Details** hyperlink.

A.6.6 Freeze/Unfreeze Dialog

Use this screen to choose a freeze to work with. Select the freeze from the supplied list.

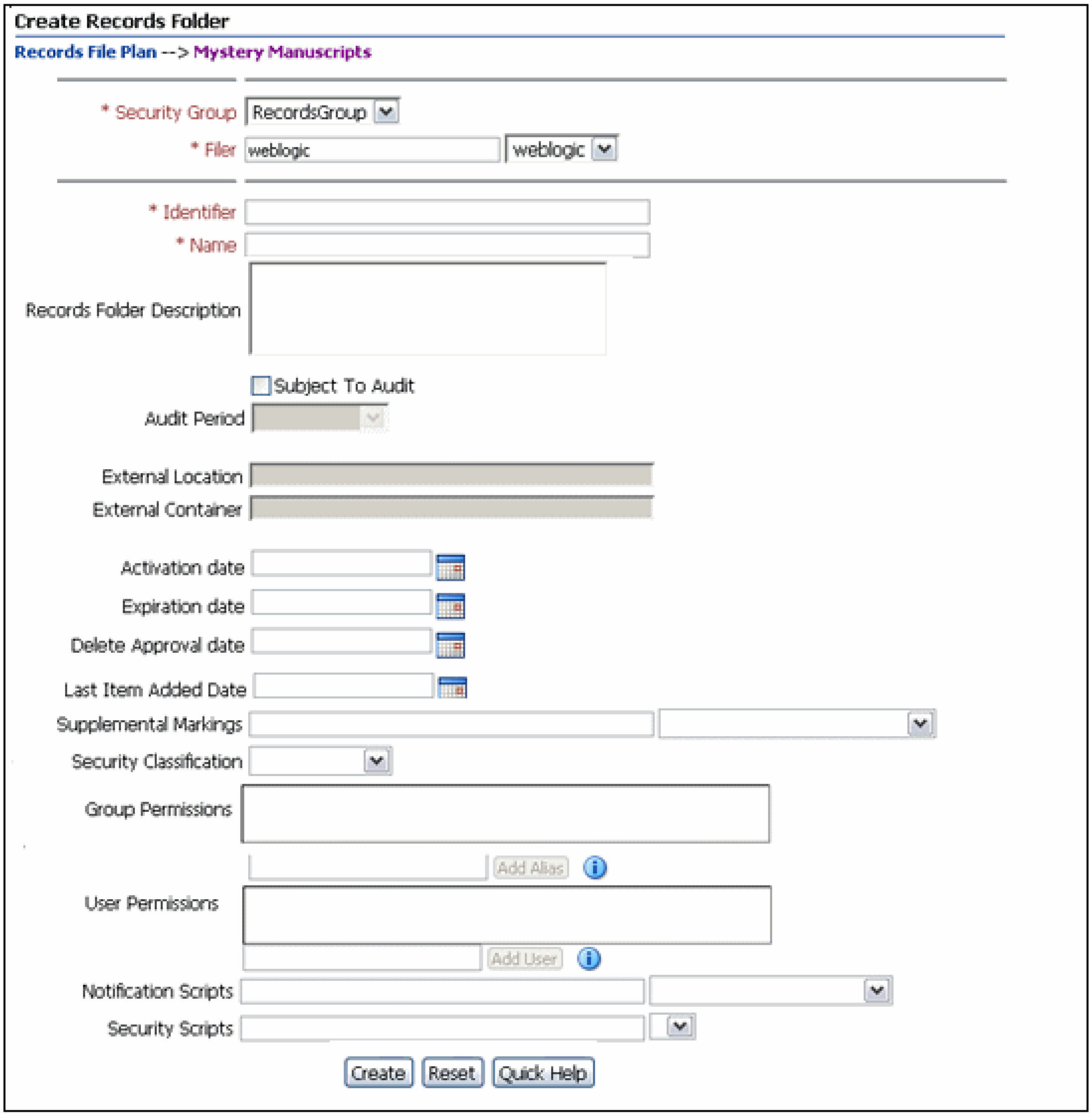


Permissions: The Folder.Freeze/Unfreeze right is required to use this screen. This right is assigned by default to the Records Administrator role.

This dialog is displayed when a freeze is chosen for a folder or content item.If freezes were chosen for a Favorites list, they appear in the pulldown menu next to Freeze Name. Click **Show All Freezes** to display all available freezes, not just those on the Favorite list.

A.6.7 Create or Edit Record Folder Page

This page is used to create a folder or edit the details about a record folder.



To access this screen, search or screen for a folder for use. Click **Edit** then **Edit Folder** from the item's **Action** menu.

The fields on this page are similar to those used to check in content. See "Content Check-In Page" on page A-4 for details.

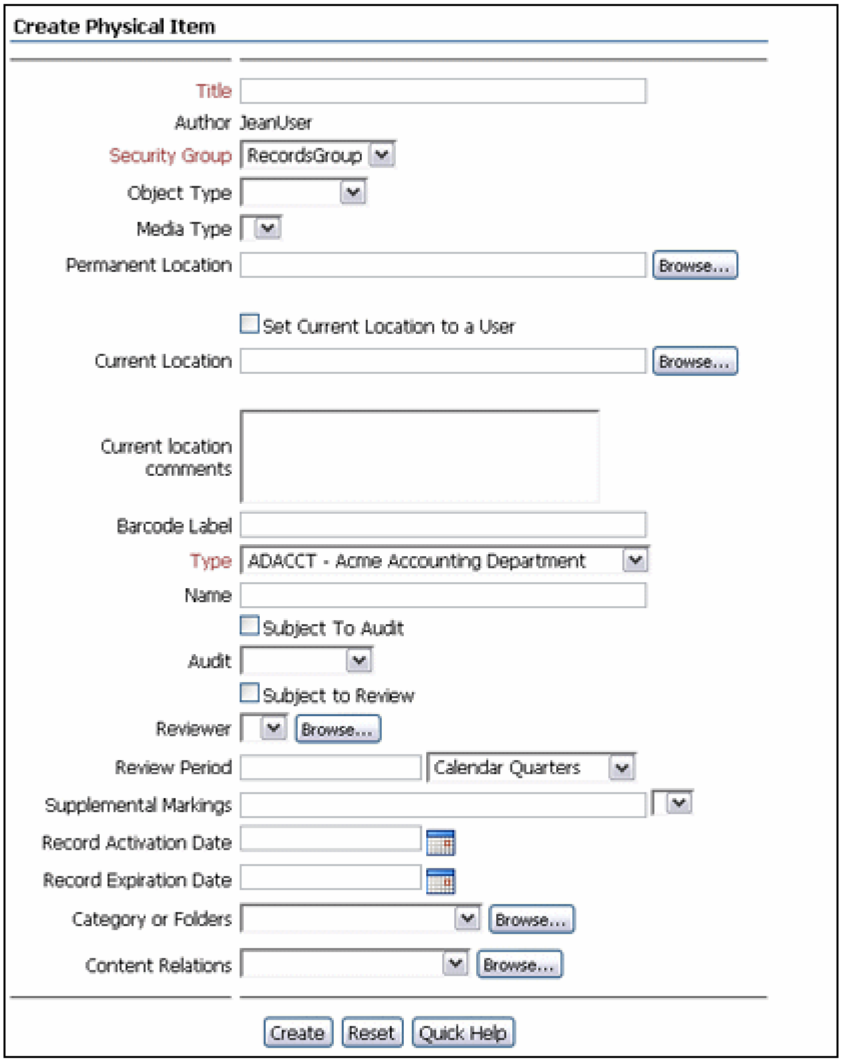
A.7 Physical Item Management Interface

The following screens are used to manage physical items:

- "Exploring Storage Page" on page A-11
- "Create or Edit Physical Item Page" on page A-30
- "Select Storage Location Dialog" on page A-32
- "Physical Item Information Page" on page A-33

A.7.1 Create or Edit Physical Item Page

Use this page to "check in" details about a new physical content item. Use the Edit Physical Item Page to modify existing properties of a physical content item. The following screen is a partial depiction of this page. The bottom half of this page is similar to a checkin page with the addition of offsite fields (if that option is enabled at a site).



Permissions: The PCM.Physical.Create or PCM.Physical.Edit right is required to use this screen. These rights are assigned by default to the PCM Requestor and PCM Administrator roles. To assign a life cycle to the physical item, you also need the Record.Create right in Oracle URM.

Access this page at several points in the interface. Add a physical item by searching for a storage location then adding an item to the location or clicking **New Checkin** then **Physical** from the Top menu.

To edit a physical item, search for the item. On the search results page, click **Edit** then click **Edit Physical Item** in the item's **Action** menu.

Following are some common fields used on this screen.

Element	Description
Title	Descriptive title for the physical item. Maximum number of characters: 80. Required.
Filer (Author)	Person who submitted the physical item. The default is the current user. If you have administrative permission, you can select an alternative filer in the list of available users. Required.
Security Group	Security group where the physical content item should be assigned. Security groups are sets of files with the same access permissions. Required. **Default: Public**.
Object Type	Type of the physical content item. Use predefined object types or create new ones. Object types do not have to be selected for a physical item. If done, select a type matching the object type of the storage location where the item is assigned (if one was specified for the location). Otherwise an error message is displayed and the checkin fails.
Media Type	Type of information carrier of the physical content item. The available media types depend on the selected object type. Use the predefined media types or create new ones.
Permanent Location	The permanent storage location of the physical item. Manually enter a location or click the Browse button and open the Select Storage Location Dialog to traverse the storage space hierarchy and select the location. After selecting a location, the Permanent Location field contains a reference to that location. This will be the barcode for the location or if no barcode is specified, it is a 19-digit number. Below the Permanent Location field, the full hierarchical storage path to the selected location is displayed. If a permanent location is not provided, it is automatically set to match the current location. On the Edit Physical Item page, only users with the PCM.Physical.Move right can modify an item's permanent location (assigned to the predefined PCM Administrator role by default).
Current Location	Current location of the physical item. Manually enter a location or click the Browse button and open the Select Storage Location Dialog dialog to traverse the storage space hierarchy and select the location. After selecting a location, the Current Location field contains a reference to that location. The reference is the barcode for that location. If no barcode is specified, it is a 19-digit number. Below the Current Location field, the full hierarchical storage path to the selected location it displayed. Set the current location to a user by selecting the **Set Current Location to a User** box. If a current location is not provided, it is automatically set to "OTHER". On the Edit Physical Item page, only users with the PCM.Physical.Move right can modify an item's current location (assigned to the predefined PCM Administrator role by default).

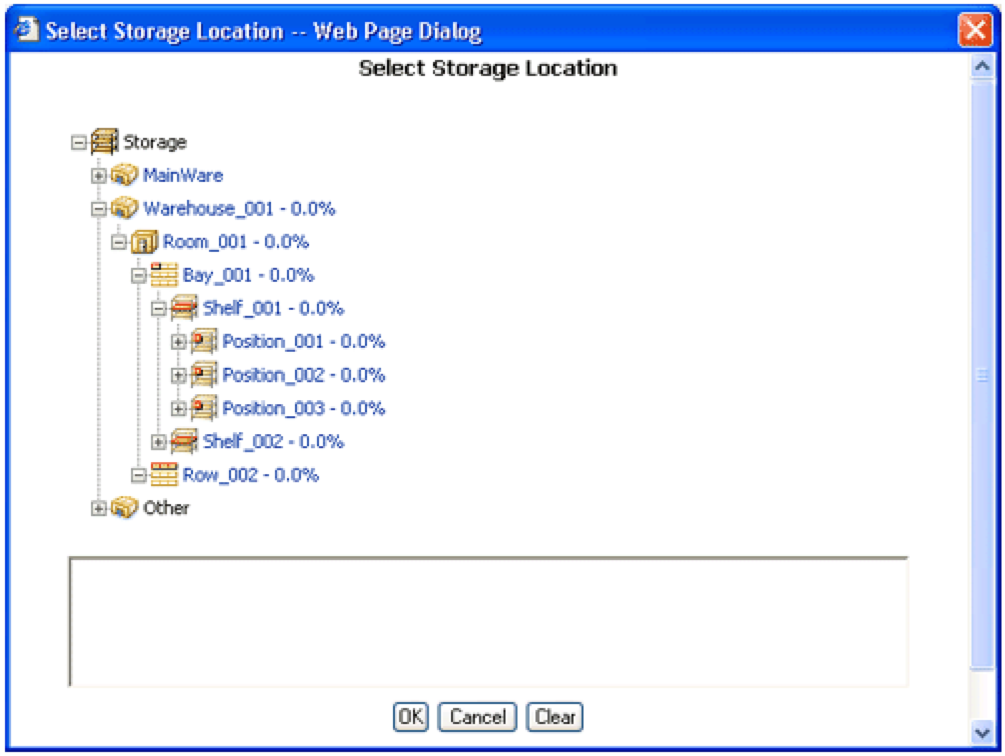
Element	Description
Current Location Comments	If required, enter a comment about the current location (for example, handling instructions or the reason the content item is there).
Barcode Label	The label used for the barcode for the physical content item. This is text printed below the barcode on the item label. If a barcode label is not provided, it is automatically set to match the specified item name (in all upper-case letters, with spaces stripped). If the repository is set up to auto-generate content IDs (in the System Properties utility), the barcode matches the automatically generated name (typically a number, possibly preceded by a prefix; for example, ID_002319).
Type	The content type. Select from the menu, which lists all defined content types in the repository.
Create button (Create Page only)	Checks in the information about the physical content item into the repository.
Submit Update button (Edit Page only)	Submits the updated definition of the physical content item.
Reset button	Resets the page to its initial default settings. When editing an existing physical content item, this returns the original content item settings before any modifications were made.
Quick Help button	Displays context-sensitive help information about this page.

If this page was accessed through the retention schedules in Oracle URM, the top of the page includes the full retention schedule path

Other fields appear on this page which are identical to those on the standard checkin page. Additional fields relating to offsite functionality may appear if that option is enabled.

A.7.2 Select Storage Location Dialog

Use this dialog to select the storage location of a physical content item.



To access this dialog, click the **Browse** button next to either of the location fields on the Create or Edit Physical Item Page.

The main box at the top shows the defined storage space hierarchy. Traverse the hierarchy to navigate to the location where the physical item is stored. After selecting select a location in the hierarchy, the box at the bottom shows the full navigation path to the selected location.

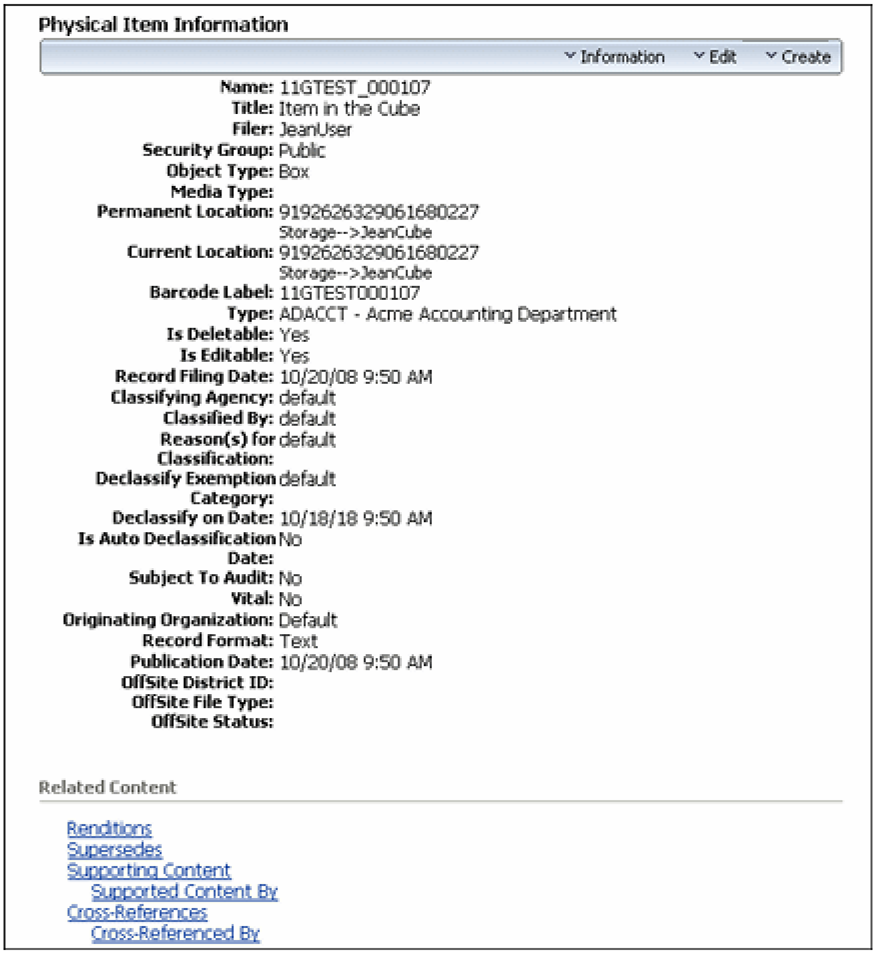
Use the plus and minus icons in front of a storage location to unfold or collapse all child locations.

You can only select storage locations that allow storage of items in them (by default, only the locations of type "Position"). All selectable locations are visually marked as links.

After selecting the desired location, click **OK** to return to the Create or Edit Physical Item Page. Click **Clear** to delete the current storage path and select a new one.

A.7.3 Physical Item Information Page

Use this page to view information about an existing physical item.



Permissions: The PCM.Physical.View right is required to use this screen. This right is assigned by default to the PCM Requestor and PCM Administrator roles.

This screen can be accessed in several ways. For example, search for the item and on the search results page click **Information** then **External Item Information** from the item's **Action** menu. You can also use the same menu for the item if the item is displayed on a listing screen.

This page shows the current properties of the physical item, including its basic metadata (name, title, filer, and security group), its freeze status, its object and media types, its storage location, and barcode label.

Note the following:

- If the repository is set up to auto-generate content IDs (using the System Properties utility), the name of a physical item was generated automatically. It is typically a number, possibly preceded by a prefix (for example, ID_002319).
- If the physical item was assigned a life cycle (retention schedule and disposition rules), the information page also includes a Retention Schedule Information section providing disposition processing and security information for the item.
- If the physical item is currently checked out, its current location is set to the value of the deliver-to location as specified when the associated reservation request was

created. If no location was provided, the current location is set to "OTHER." If a location comment was specified for the associated reservation request, the Current Location Comments field shows this comment. Otherwise it contains the login name of the user who created the reservation request.

- If the physical item is contained within another physical item, the current location and/or permanent location field includes a **Container Details** link, which opens the information page of the parent physical item (the "container").

A.8 Chargeback Management Screens

The following screens are used in PCM to manage transactions and chargebacks:

- "Transaction Management Screens" on page A-35
- "Chargebacks, Charge Types and Billers" on page A-38

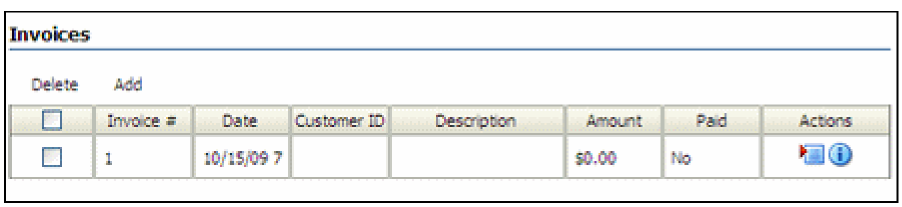
A.8.1 Transaction Management Screens

The following screens are used to manage invoices and transactions:

- "Invoices Page" on page A-35
- "Create Manual Transaction Page" on page A-40
- "Screen Contents and Records for Invoice Page" on page A-36
- "Charge Transactions Page" on page A-37
- "View Invoice Details Page" on page A-38

A.8.1.1 Invoices Page

This page is used to view details about invoices. All invoices appear until specifically deleted from this list. From this page each individual invoice can be viewed, edited, deleted, or printed.



Permissions: The PCM.AdminManager right and the CBC.ChargeBacks.Admin right are required to use this screen. These rights are assigned by default to the PCM Administrator role.

To access this page, click **Physical** then **Invoices** from the Top menu.

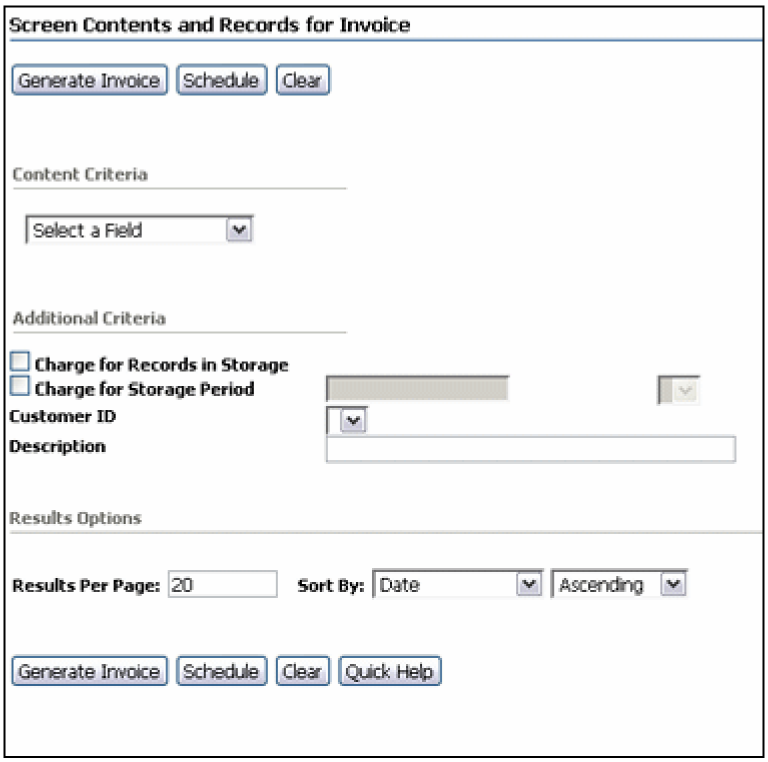
Note that not all menu options appear on this screen for all users. The menu options depend on the rights assigned.

Element	Description
Delete	Marks the invoice for deletion.
Invoice #	The invoice number, listed sequentially.
Date	The invoice creation date.

Element	Description
Customer ID	ID of the customer the invoice is sent to or otherwise assigned to.
Description	Short description of the invoice (if entered).
Amount	Total amount due on the invoice.
Paid	Listed ‘Yes’ or ‘No’ depending on whether the invoice was paid.

A.8.1.2 Screen Contents and Records for Invoice Page

This screen is used to filter transactions based on selected parameters and use the filtered transactions to create a new invoice. This can be done at any time or it can be scheduled to run at a defined interval.



Permissions: The PCM.AdminManager right and the CBC.ChargeBacks.Admin right are required to use this screen. These rights are assigned by default to the PCM Administrator role.

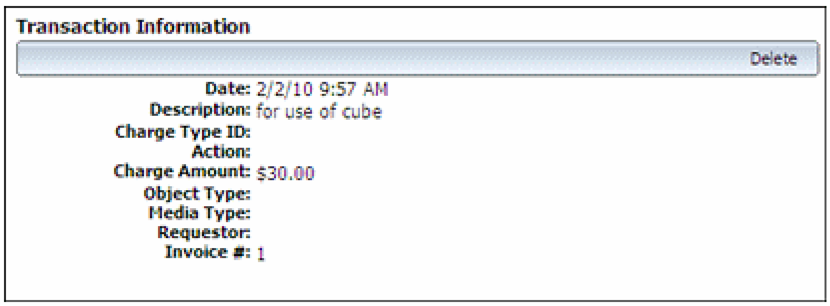
To access this page, click **Physical** then **Invoices** from the Top menu. Click **Add** on the Invoices Page.

Element	Description
Content Criteria	Defines transactions and records used to create the invoice.
Additional Criteria	Check the boxes to include charges for records in storage or the storage period. If using the storage period, enter the storage time and its label (for example, ’weeks’ or ’days’).
Customer ID	Select a customer ID to narrow the criteria search to only items billed to that customer.

Element	Description
Description	Enter a description to use as a search criteria.
Results Options	Enter the number of items to display on a page and sorting criteria.
Generate Invoice button	Generates the invoice as a PDF file.
Schedule button	Schedules the screening action, so it is performed automatically.
Clear button	Resets the page to its initial default settings.

A.8.1.3 Transaction Information Page

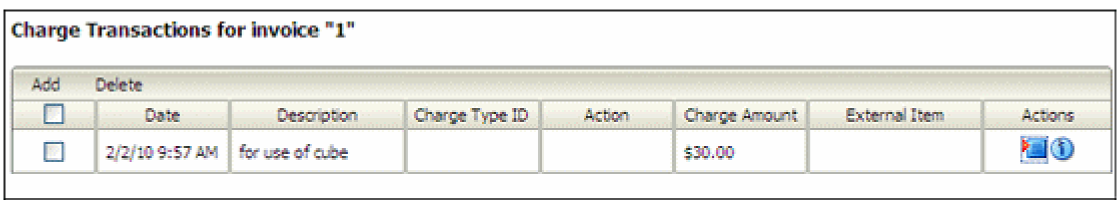
This page shows information about a transaction.



To access this page, click the **Info** icon on the Charge Transactions Page.

A.8.1.4 Charge Transactions Page

Use this page to view the specific information about the selected transaction.



Permissions: The PCM.AdminManager right, the CBC.ChargeBacks.Read right, and the CBC.ChargeBacks.Admin right are required to use this screen. These rights are assigned by default to the PCM Administrator role.

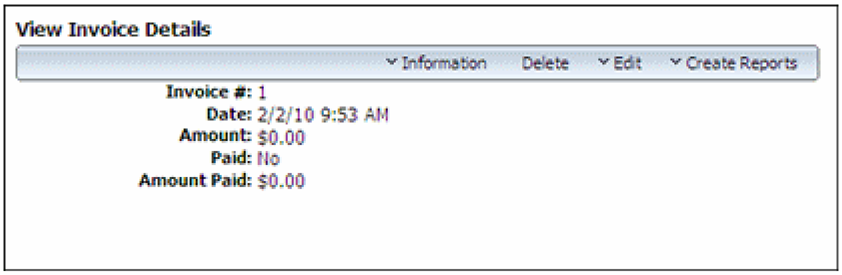
To access this page, click **Information** then **View Transactions** from an item's **Action** menu on the Invoices Page. A list of transactions for that invoice are displayed. Click **Information** then **Item Information** in the **Actions** menu of a transaction.

Element	Description
Date	The transaction creation date.
Description	The transaction description.
Charge Type ID	The transaction charge type as defined when created on the Create/Edit Charge Type page. See the *Oracle Fusion Middleware Setup Guide for Universal Records Management* for details about creating charge types.

Element	Description
Action	Creation, destruction, reservation, or storage.
Charge Amount	Total amount charged for the transaction.
External Item	The external item associated with the transaction, if applicable.

A.8.1.5 View Invoice Details Page

Use this page to view the specific information for the selected invoice.



Permissions: The PCM.AdminManager right, the CBC.ChargeBacks.Read right, and the CBC.ChargeBacks.Admin right are required to use this screen. These rights are assigned by default to the PCM Administrator role.

This page is displayed after clicking **Generate Invoice** on the Screen Contents and Records for Invoice Page. Or display this page by clicking the **Info** icon of an invoice on the Invoices Page.

Note that not all menu options appear on this screen for all users. The menu options depend on the rights assigned.

Element	Description
Invoice #	The number of the invoice as sequentially created.
Date	The date the invoice was created.
Customer ID	The customer charged for the invoice.
Amount	The total amount of the invoice, combining all charges for all transactions.
Paid	The payment status (if the invoice has been paid).
Amount Paid	Amount the customer has paid toward the total amount of the invoice.

A.8.2 Chargebacks, Charge Types and Billers

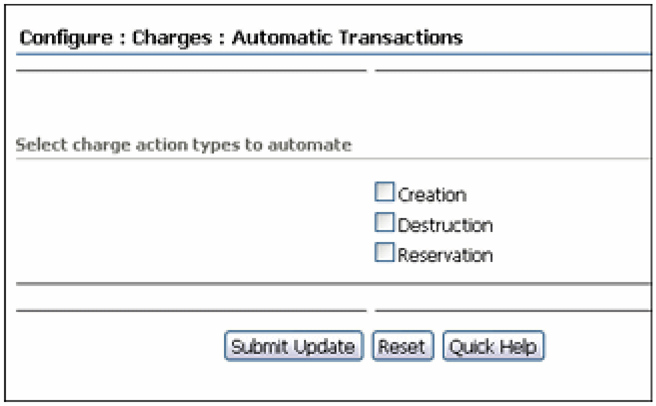
The following screens are used to configure chargebacks, charge types, and customers:

- "Configure Automatic Transactions Page" on page A-39
- "Configure Charge Type Page" on page A-39
- "Create Manual Transaction Page" on page A-40
- "Create or Edit Charge Type Page" on page A-41
- "Configure Payment Methods Page" on page A-42

- "Create or Edit Payment Method Page" on page A-42
- "Payment Type Information Page" on page A-43
- "Configure Customers Page" on page A-43
- "Customer Information Page" on page A-44

A.8.2.1 Configure Automatic Transactions Page

This page is used to set up the chargeback functionality in PCM.



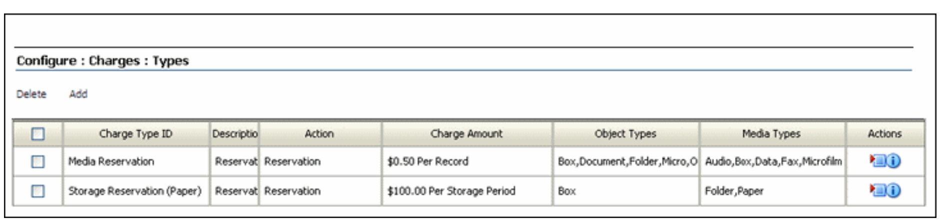
To access this page, click **Physical** then **Configure** from the Top menu. Click **Charges** then **Automatic Transaction**.

Permissions: The PCM.Admin.Manager right and the PCM.Admin.LocationTypes right to perform this action. These rights are assigned by default to the PCM Administrator role.

Element	Description
Creation	Automatically creates transactions for creating physical items.
Destruction	Automatically creates transactions for destroying physical items.
Reservation	Automatically creates transactions for reserving physical items.

A.8.2.2 Configure Charge Type Page

This page is used to view all defined charge types and to add and delete charge types.



To access this page, click **Physical** then **Configure** from the Top menu. Click **Charges** then **Types**.

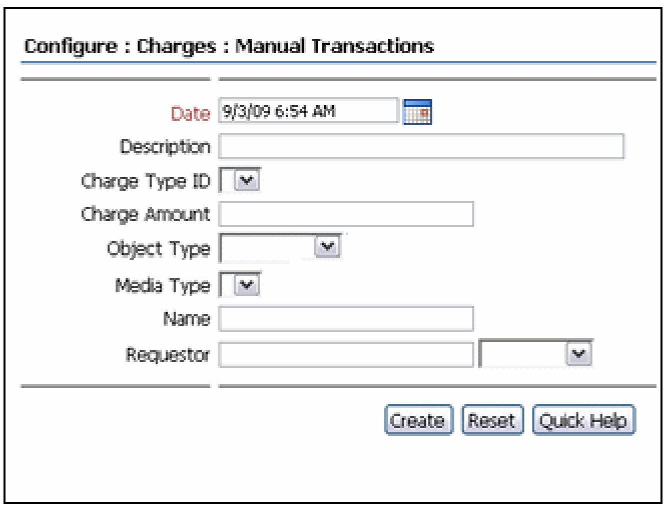
Permissions: The PCM.Admin.Manager right and the CBC.ChargeBacks.Admin right are needed to perform this action. These rights are assigned by default to the PCM Administrator role.

The system will always use the most specific charge type. For example, if charge type A has two criteria and charge type B has the same two criteria plus another one, charge type B is recorded for a transaction meeting all three criteria of charge type B (even though it also meets the two criteria of charge type A).

Element	Description
Add	Opens a screen to add a charge type.
Delete	Marks the invoice for deletion.

A.8.2.3 Create Manual Transaction Page

This page is used to create transactions not assigned to an invoice. The transaction includes the type of object and media and the amount and charge type and other information. After a transaction is created it can be then collected into an invoice.



Permissions: The PCM.AdminManager right, CBC.ChargeBacks.Create right, and the CBC.ChargeBacks.Admin right are required to use this screen. These rights are assigned by default to the PCM Administrator role.

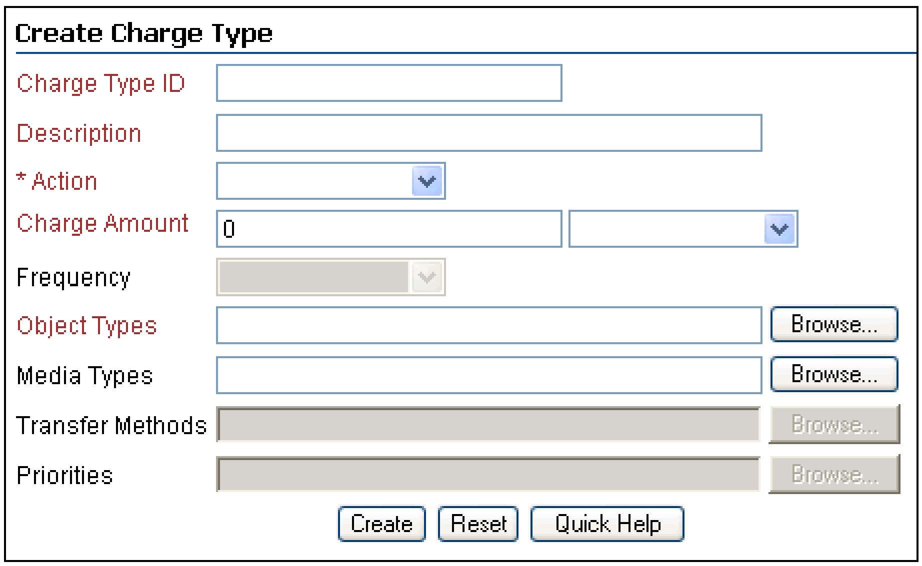
To access this page, click **Physical** then **Configure** from the Top menu. Click **Chargebacks**.

Element	Description
Date	The transaction creation date.
Description	The transaction description.
Charge Type ID	The transaction charge type as defined when created on the Create/Edit Charge Type page. See the *Oracle Fusion Middleware Setup Guide for Universal Records Management* for details about creating charge types.

Element	Description
Charge Amount	The amount he transaction will be billed for.
Object Type	The object type of the physical items being transacted.
Media Type	The media type of the physical items being transacted.
Name	The ID of the physical item being transacted.
Requestor	The person requesting the transaction who will be charged on the invoice when the transaction is posted to an invoice.
Create button	Creates the transaction.
Reset button	Resets the page to its initial default settings.
Quick Help button	Displays context-specific help information about this page.

A.8.2.4 Create or Edit Charge Type Page

Use the Create Charge Type Page to define a new charge type. Use the Edit Charge Type Page to change a charge type.



To access this page, click **Add** on the Configure Charge Type Page.

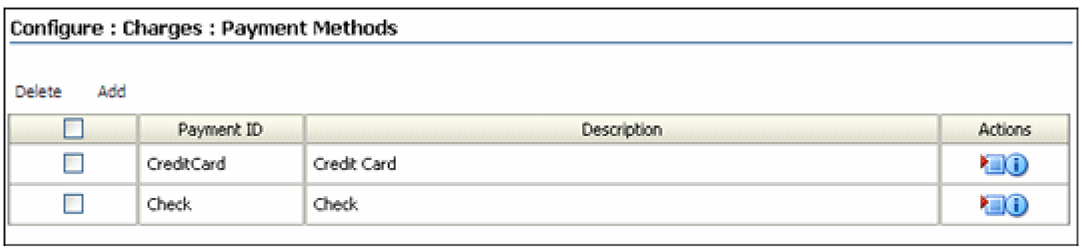
Permissions: The PCM.Admin.Manager right, the CBC.ChargeBacks.Admin right and the CBC.ChargeBacks.Create or CBC.ChargeBacks.Edit rights are needed to perform these actions. These rights are assigned by default to the PCM Administrator role.

Element	Description
Charge Type ID	A unique identifier for the charge type. Maximum number of characters: 30. This field is view-only on the Edit Charge Type page. Required.
Description	A brief description for the charge type. Maximum number of characters: 60. Required.
Action	The action of the charge type, either Creation, Destruction, Reservation, or Storage. Required.

Element	Description
Charge Amount	The amount of the charge, in dollars and cents. Choose the charge action (per item or per period).
Frequency	The frequency of the storage period. This is available only when **Action** is set to 'Storage'.
Object Types	The appropriate object type(s) that triggers this charge type. Use the Browse button to view and select an object type from the list.
Media Types	The media type(s) that triggers this charge type. Use the Browse button to view and select an object type from the list.
Transfer Methods	The transfer method of reservations that triggers the charge type. This field is only available for reservations.
Priorities	The transfer priority that triggers the charge type. This field is only available for reservations.

A.8.2.5 Configure Payment Methods Page

This page is used to view all defined payment types and to add or delete payment types.

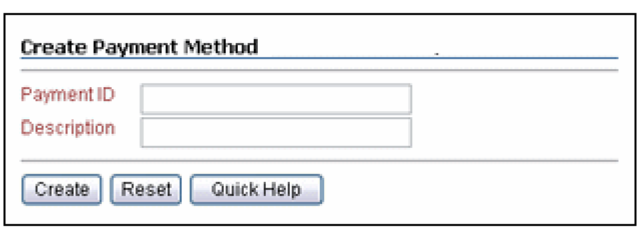


To access this page, click **Physical** then **Configure** from the Top menu. Click **Charges** then **Payment Methods**.

Permissions: The PCM.Admin.Manager right and the CBC.ChargeBacks.Admin right are needed to perform this action. These rights are assigned by default to the PCM Administrator role.

A.8.2.6 Create or Edit Payment Method Page

Use this page to create or edit the properties of an existing payment type.



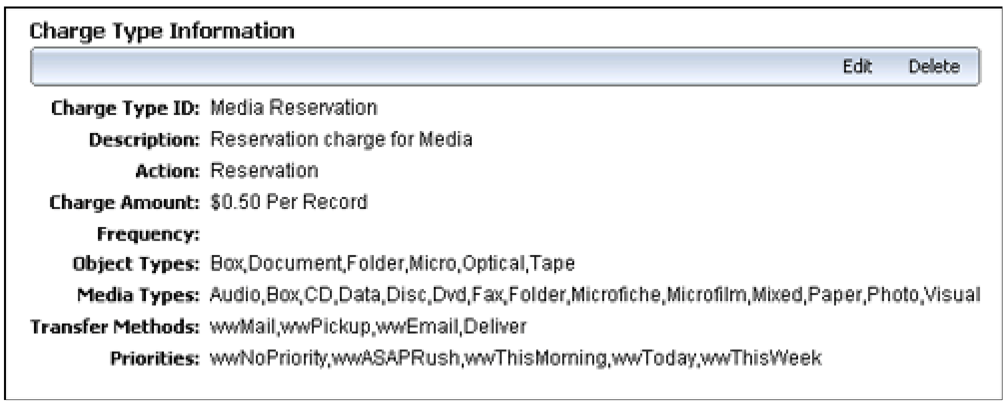
To access this page, click **Physical** then **Configure** from the Top menu. Click **Charges** then **Payment Methods**. Click **Add** to add a new payment type. To edit a payment type, click **Edit Payment Method** from the item's **Action** menu.

Permissions: The PCM.Admin.Manager right, the CBC.ChargeBacks.Admin, and the CBC.ChargeBacks.Edit or CBC.ChargeBacks.Create right are needed to perform this action. These rights are assigned by default to the PCM Administrator role.

Element	Description
Payment ID	A unique name for the payment type. Maximum number of characters: 30. This field is view-only on the Edit Payment Type page. Required.
Description	A brief description for the payment type. Maximum number of characters: 60. Required.

A.8.2.7 Payment Type Information Page

This page is used to view the properties of an existing charge type.



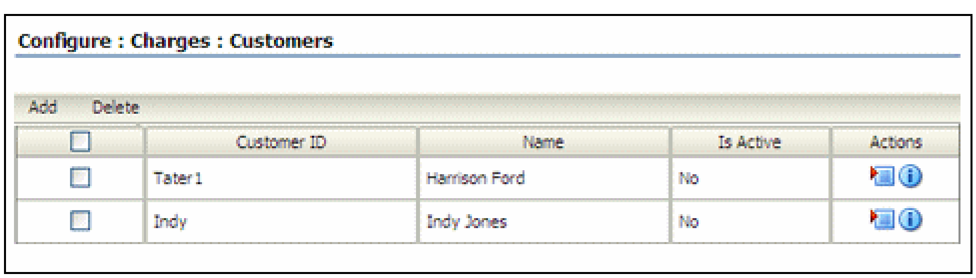
To access this page, click **Information** then **Item Information** from an item's **Action** menu on the Configure Charge Type Page.

Note that not all menu options appear on this screen for all users. The menu options depend on the rights assigned.

Permissions: The PCM.Admin.Manager right, the CBC.ChargeBacks.Admin right and the CBC.ChargeBacks.Read rights are needed to perform this action. These rights are assigned by default to the PCM Administrator role.

A.8.2.8 Configure Customers Page

This page is used to view information about all defined customers. Customers can also be added and deleted from this page.

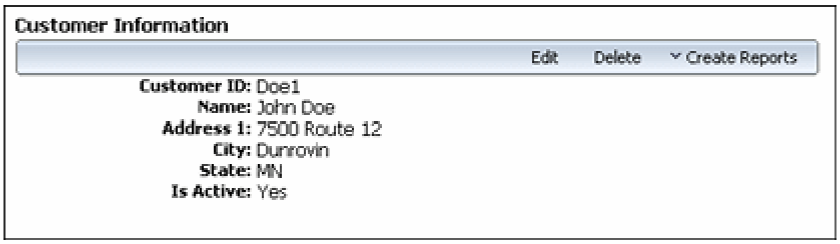


To access this page, click **Physical** then **Configure** from the Top menu. Click **Charges** then **Customers**.

> **Permissions:** The PCM.Admin.Manager right and the CBC.ChargeBacks.Admin right are needed to perform this action. These rights are assigned by default to the PCM Administrator role.

A.8.2.9 Customer Information Page

Use this page to view the properties of an existing customer.



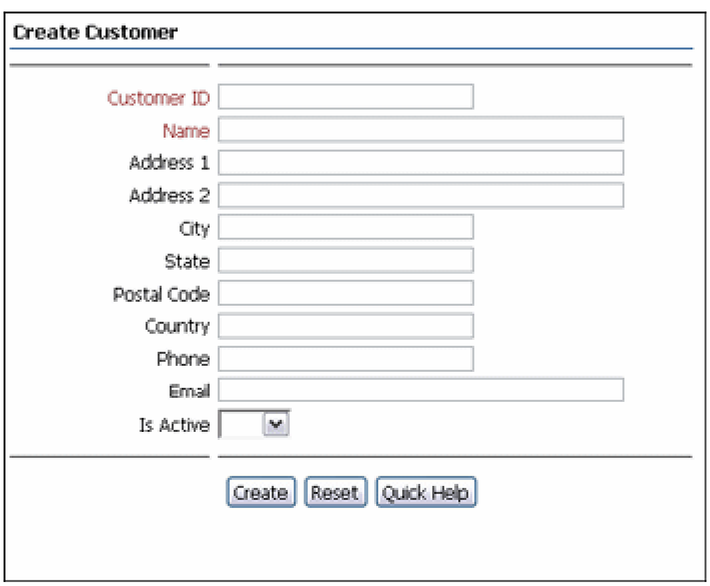
To access this page, click **Information** then **Item Information** from the Action menu of an item on the Configure Customers Page.

Note that not all menu options appear on this screen for all users. The menu options depend on the rights assigned.

> **Permissions:** The PCM.Admin.Manager right, the CBC.ChargeBacks.Admin, and the CBC.ChargeBacks.Read rights are needed to perform this action. These rights are assigned by default to the PCM Administrator role.

A.8.2.10 Create or Edit Customer Page

Use this page to define or edit the properties of a customer.



To access this page, click **Add** on the Configure Customers Page.

To edit a customer, click **Edit Customer** from the **Actions** menu of the customer listed on the Configure Customers Page.

Permissions: The PCM.Admin.Manager right, the CBC.ChargeBacks.Admin right, and the CBC.ChargeBacks.Create or CBC.ChargeBacks.Edit right are needed to perform this action. These rights are assigned by default to the PCM Administrator role.

Element	Description
Customer ID	A unique identifier for the group being billed. This name is displayed in the location type hierarchy. Maximum number of characters: 30. This field is view-only on the Edit Location Type page. Required.
Name	A brief description for the customer. Maximum number of characters: 60. Required.
Address and contact information	The contact information for the customer, including address, postal code, email or phone.
Is Active	Indication if the customer is still active or inactive. **Default: no**.

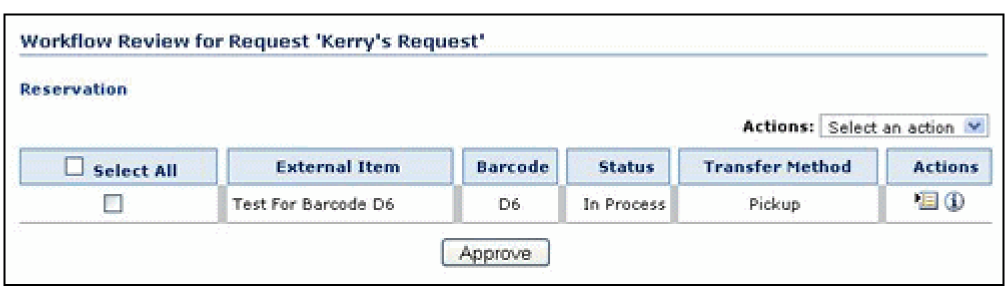
A.9 Reservation Management Screens

The following screens are used when managing physical item reservations:

- "Workflow Review for Request Page" on page A-45
- "Create or Edit Request Page" on page A-46
- "Reservation Search Results Page" on page A-48
- "Request Information Page" on page A-48
- "Items for Request Page" on page A-49
- "Request Item Information Page" on page A-49
- "Edit Request Item Page" on page A-50

A.9.1 Workflow Review for Request Page

Use this page to see what items are included in a reservation request and to approve or reject the request.



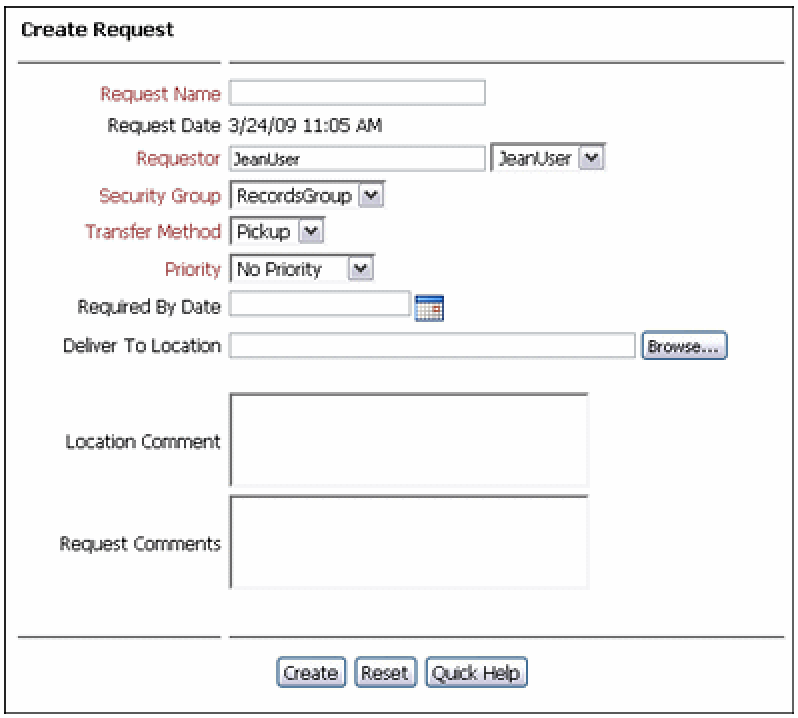
To access this page, click the **Review workflow item** link in the workflow review notification e-mail received.

This page shows the items included in the reservation request, including their name, barcode, current status and selected transfer method.

Element	Description
External Item	The name of the individual physical item in a reservation request.
Barcode	The barcode value of the individual item in a reservation request.
Status	The current status of the individual item in a reservation request.
Transfer Method	The selected transfer method for the individual item in a reservation request.
Action menu	Displays a popup menu with several options relevant to the item. In addition, the popup menu for individual request items includes several actions enabling a user to change the status of the item.
Info icon	Displays the Request Item Information Page.

A.9.2 Create or Edit Request Page

Use the Create Request Page to create a new reservation request. Use the Edit Request Page to modify a current request.



Permissions: The PCM.Reservation.Create or PCM.Reservation.Edit right is required to use this screen. These rights are assigned by default to the PCM Requestor and PCM Administrator roles.

If offsite storage has been enabled, other fields may appear on this screen.

To access this page, search for a physical item(s) to reserve. On the Search Results Page, click the check box of the item to reserve. Click **Actions** then **Add to Active Content Basket** on the Table menu. The Content Basket is displayed. Check the boxes of the items to be reserved and click **Request** then **Request Selected Items** from the Table menu.

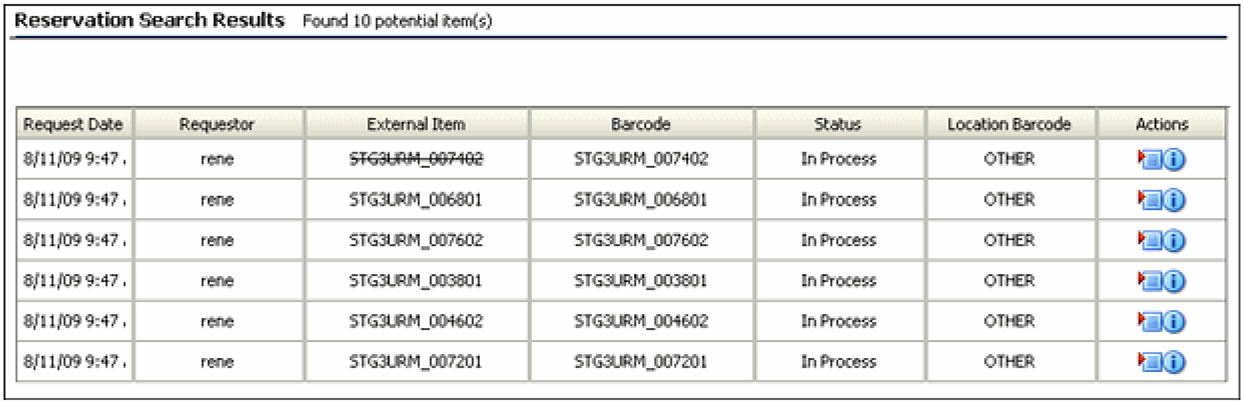
To access the Edit Request page, locate the item to edit and click **Edit Request Information** from the item's **Action** menu.

Element	Description
Request Name	A name for the reservation request. This name does not have to be unique. Multiple reservation requests can be created with the same name. Maximum number of characters: 30. Required. Each reservation request has a unique system-internal reference. The PCM functionality keeps track of each reservation request using this internal reference, not the request name.
Request Date	The date and time the reservation request was made. The default is the current date and time. Required. This field is view-only on the Edit Request page.
Requestor	The person who submitted the reservation request. The default is the user currently logged in. Select a different user from the list, or manually enter a user. Required. This field is view-only on the Edit Request page.
Security Group	The security group where the reservation request should be assigned. Security groups are sets of files with the same access permissions. Use security groups to limit the reservation requests to which users have access. Required.
Transfer Method	The desired transfer method for the reservation request. Required.
Priority	The desired priority for the reservation request. Required.
Required By Date	The date when the reserved item(s) should be available. Click the calendar icon to select a date from a popup dialog. Required. Providing a time along with a date is optional. If a time is not specified, 12:00 PM (midnight) is assumed.
Deliver To Location	The location where the reserved item(s) should be delivered. If this location is somewhere in the storage space environment, use the Browse button to select the location. Otherwise, specify 'Other' or leave this field empty. Then use the Location Comment field to provide delivery details. If an item is checked out, its current location (as shown on the Physical Item Information page) is automatically set to the value of this field for the associated reservation request. If no value was entered, the current location is set to "OTHER."
Location Comment	If required, specify details about the delivery location (for example, "Building A, Room 315"). If an item is checked out, the value of this field is shown in the Current Location Comment field on the Physical Item Information page. If a location comment is not specified, the Current Location Comment field shows the login name of the user who made the reservation.
Comments	If required, specify additional comments about the reservation request (for example, delivery or handling instructions).
Create button (Create Page only)	Creates the reservation request.
Submit Update button (Edit Page only)	Submits the updated reservation request.
Reset button	Resets the page to its initial default settings. If editing an existing reservation request, this returns the original request settings before modifications were made.

Element	Description
Quick Help button	Displays context-specific help information about this page.

A.9.3 Reservation Search Results Page

This page shows all active reservations.


Reservation Search Results Found 10 potential item(s)

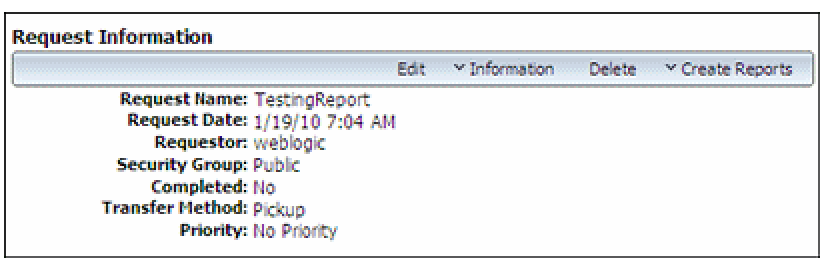
Request Date	Requestor	External Item	Barcode	Status	Location Barcode	Actions
8/11/09 9:47	rene	~~STG3URM_007402~~	STG3URM_007402	In Process	OTHER	
8/11/09 9:47	rene	STG3URM_006801	STG3URM_006801	In Process	OTHER	
8/11/09 9:47	rene	STG3URM_007602	STG3URM_007602	In Process	OTHER	
8/11/09 9:47	rene	STG3URM_003801	STG3URM_003801	In Process	OTHER	
8/11/09 9:47	rene	STG3URM_004602	STG3URM_004602	In Process	OTHER	
8/11/09 9:47	rene	STG3URM_007201	STG3URM_007201	In Process	OTHER	

To access this page, click Physical then Reservations from the Top menu.

Element	Description
Request Date	The date and time the reservation request was made.
Requestor	The person who submitted the reservation request.
External Item	The name of an individual physical item currently included in a reservation request.
Barcode	The barcode value of an individual item currently included in a reservation request.
Status	The current status of an individual item currently included in a reservation request.
Location bar code	The bar code of the current location of the item.

A.9.4 Request Information Page

Use this page to view the properties of an existing reservation request.



Permissions: The PCM.Reservation.Read right is required to use this screen. This right is assigned by default to the PCM Requestor and PCM Administrator roles.

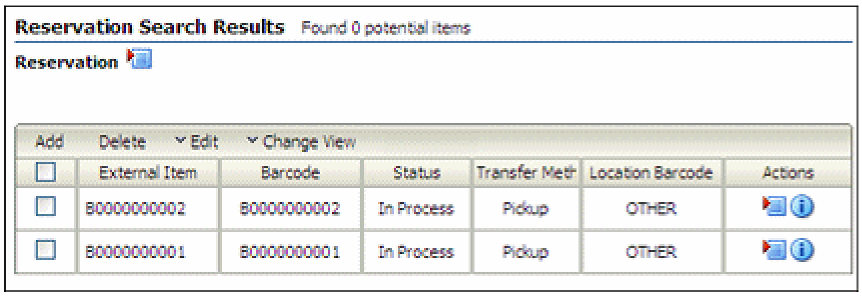
To access this page, click **Information** then **Request Information** from an item's **Action** menu on the Reservation Search Results Page.

This page shows the current properties of the selected reservation request. It also shows if the reservation request has been completed. A reservation request is considered completed if none of its request items are still pending (in process), on a waiting list, or checked out.

Note that not all menu options appear on this screen for all users. The menu options depend on the rights assigned.

A.9.5 Items for Request Page

A reservation may consist of more than one requested item. Use this page to view a list of all individual items included in a reservation request.



Permissions: The PCM.Reservation.Edit right is required to use this screen. This right is assigned by default to the PCM Administrator role.

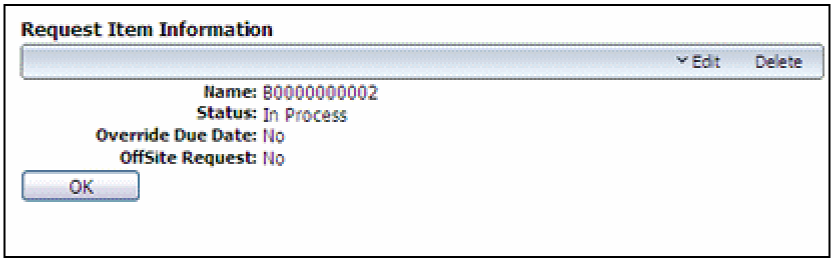
To access this page, click **Information** then **View Request Items** from the Page menu on the Request Information Page.

Note that not all menu options appear on this screen for all users. The menu options depend on the rights assigned.

Element	Description
External Item	The name of the individual physical item in a reservation request.
Barcode	The barcode value of the individual item in a reservation request.
Status	The current status of the individual item in a reservation request.
Transfer Method	The selected transfer method for the individual item in a reservation request.
Info icon	Displays the Request Item Information Page.

A.9.6 Request Item Information Page

Use this page to view the properties of an individual item in an existing reservation request. These properties include the offsite request status, the status of hte request, and the name of the request.



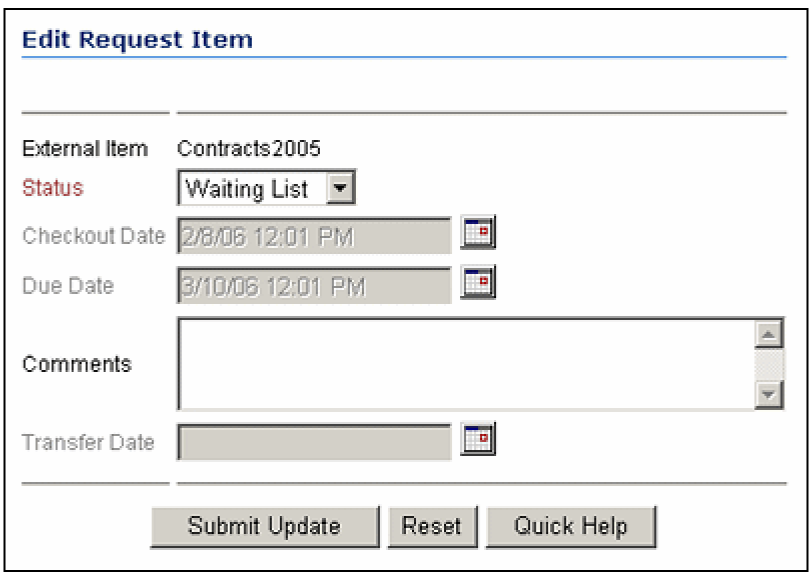
Permissions: The PCM.Reservation.Edit right is required to use this screen. This right is assigned by default to the PCM Administrator role.

To access this page, click **Request Item Information** from the item's **Actions** menu on the Items for Request Page.

Note that not all menu options appear on this screen for all users. The menu options depend on the rights assigned.

A.9.7 Edit Request Item Page

Use this page to modify the properties of an item in an existing reservation request. It can be used to change the status of the item and add or modify comments.



Permissions: The PCM.Reservation.Edit right is required to use this screen. You must also have the PCM.Reservation.Process right to change the status of an item. These rights are assigned by default to the PCM Administrator role.

To access this page, search for the request item and click **Request Item Information** from the **Action** menu. The Request Item Information Page is displayed. Click **Edit** on the Page menu.

Element	Description
External Item	The name of the request item.
Status	The status of the request item. The default is the item's current status or select a different status from the list. You must have the PCM.Reservation.Process right to change the status of an item.
Checkout Date	The date and time the item was checked out.
Due Date	The date and time the item should be returned according to the checkout period set when the system was configured.
Comments	Add or modify comments about the requested item.
Transfer Date	The date and time the item was transferred to its intended recipient if a timestamp was specified.
Submit Update button	Submits updated information about the request item.
Reset button	Returns the original settings before any modifications were made.
Quick Help button	Displays context-specific help information about this page.

A.10 Content Basket Screens

The following screens are used to manage a Content Basket:

- "Content Basket Manager Page" on page A-51
- "Content Basket Page" on page A-51

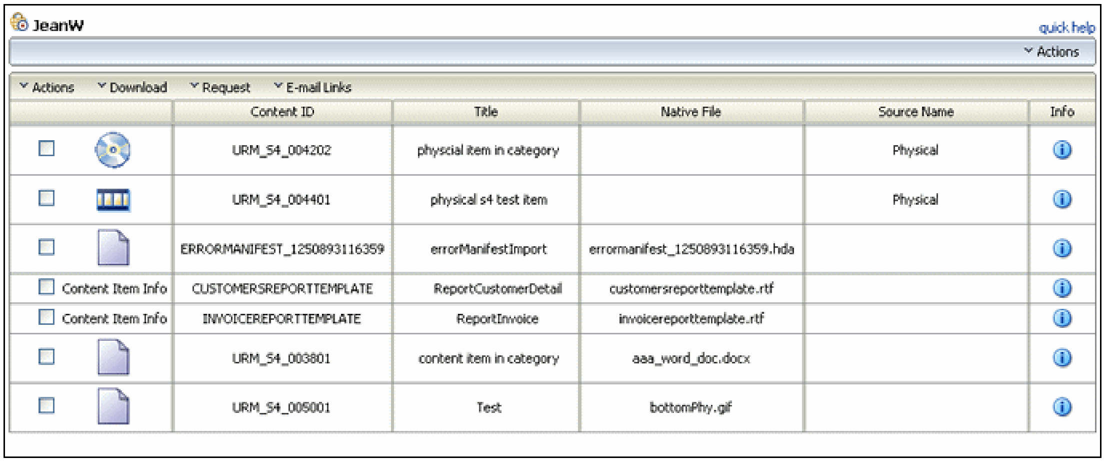
A.10.1 Content Basket Manager Page

This page is used to create new content baskets and to designate the currently active basket.

To access this page, click **My Content Server** then **My Baskets**.

A.10.2 Content Basket Page

This page shows all items currently in the content basket.



To access this page, click **My Content Server** from the Main menu then click the name of the content basket in the displayed list.

The Actions menu on this page has the following options:

- **Save Content Basket Ordering**: used to save the ordering of items in the basket
- **Empty Content Basket**: used to empty all items from the basket
- **Make Active**: used to make the current basket the active basket
- **Publish to Folio**: used to publish the items in the basket to a folio. See the *Oracle Fusion Middleware User's Guide for Content Server* for details about using folios.

Element	Description
Thumbnail	A thumbnail image representing the type of item.
Content ID	The ID of the item in the basket.
Title	The title used for the item.
Native File	The name of the file associated with the item.
Source Name	The source from where the item was obtained.

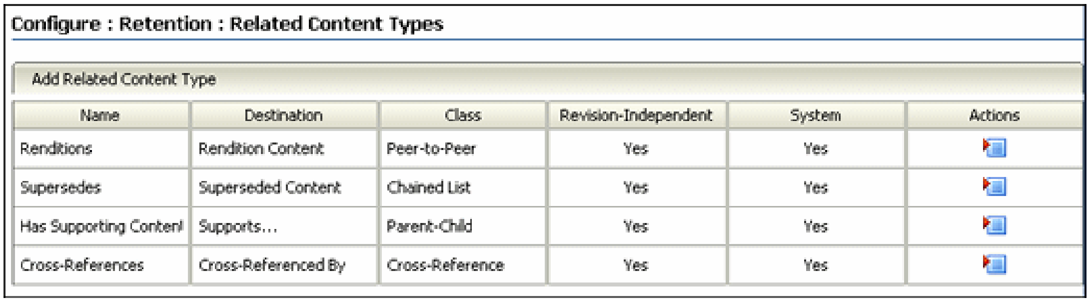
A.11 Link Management Interface

The following screens are used to manage links:

- "Configure Link Types Page" on page A-52
- "Add or Edit Related Content Type Page" on page A-53

A.11.1 Configure Link Types Page

This page is used to view the existing types of links and to add a custom link name based on one of the predefined link classes.


Configure : Retention : Related Content Types

Add Related Content Type

Name	Destination	Class	Revision-Independent	System	Actions
Renditions	Rendition Content	Peer-to-Peer	Yes	Yes	
Supersedes	Superseded Content	Chained List	Yes	Yes	
Has Supporting Content	Supports...	Parent-Child	Yes	Yes	
Cross-References	Cross-Referenced By	Cross-Reference	Yes	Yes	

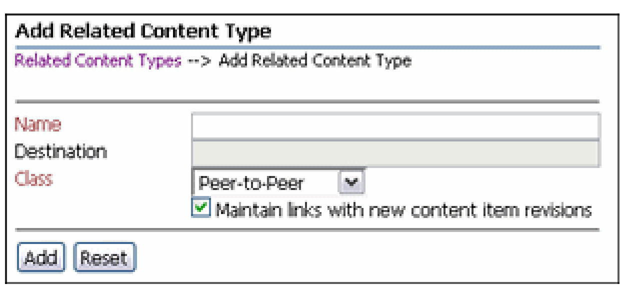
To access this page, click **Records** then **Configure** from the Top menu. Click **Retention** then **Related Content Types**.

Permissions: The Admin.ConfigureLinkTypes right is required to use this page. This right is assigned by default to the Records Administrator role.

Element	Description
Name	The name of the defined link type.
Destination	The destination of the defined link type, usually a description of the type of linked content item to which the parent points. Destination descriptions are not supported for link types based on the peer-to-peer or chained list link class, so this column is always empty for these link types.
Class	The link class that the defined link type is based on.
Revision-Independent	Indicates if the relationship is revision independent.
System	Indicator of system types, containing "Yes" for predefined link types and "No" for custom link types.
Actions	Custom link types (System = "No"): this column contains an Actions menu used to edit or delete the custom link type. Predefined link types (System = "Yes"): this column is always empty. These cannot be edited or deleted.

A.11.2 Add or Edit Related Content Type Page

Use the Add Page to define a own custom link based on the predefined classes of links. Use the Edit Page to modify those links.



To access this page, click **Add Related Content Type** on the Configure Link Types Page.

Use the Edit Page to modify the properties of an existing custom link type. To access this page, select **Edit** from the related type's **Action** menu on the Configure Link Types Page.

Permissions: The Admin.ConfigureLinkTypes right is required to use these pages. This right is assigned by default to the Records Administrator role.

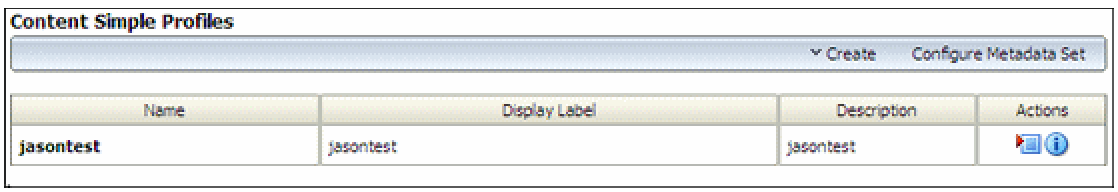
Element	Description
Name	The name of a custom link. Maximum characters: 50. Required.
Destination field	Used for link types based on the supporting content or cross-reference link class. A description of the destination of the custom link type, typically the type of linked item where the parent is pointing (for example, "Enclosed By" or "Rendition Of"). The destination is displayed on the Configure Link Types Page, and also in the Links area of the content information page of a content item. Maximum number of characters: 50.
Class list	The link class for the custom link type: ■ Peer to peer class ■ Chained list class ■ Supporting content class ■ Cross-reference class This field is view-only on the edit page.
Maintain links with new content item revisions	Specifies that links be maintained with future revisions of the item.
Add button *(Add Link Type page)*	Adds the new custom link type to the Configure Link Types Page. The links are also available to authorized users in the Links area of the content information pages and the Actions menu on the search results pages.

A.12 Simple Profiles Interface

This section contains the following topics:

A.12.1 Profile Listing Page

This page lists all available profiles.

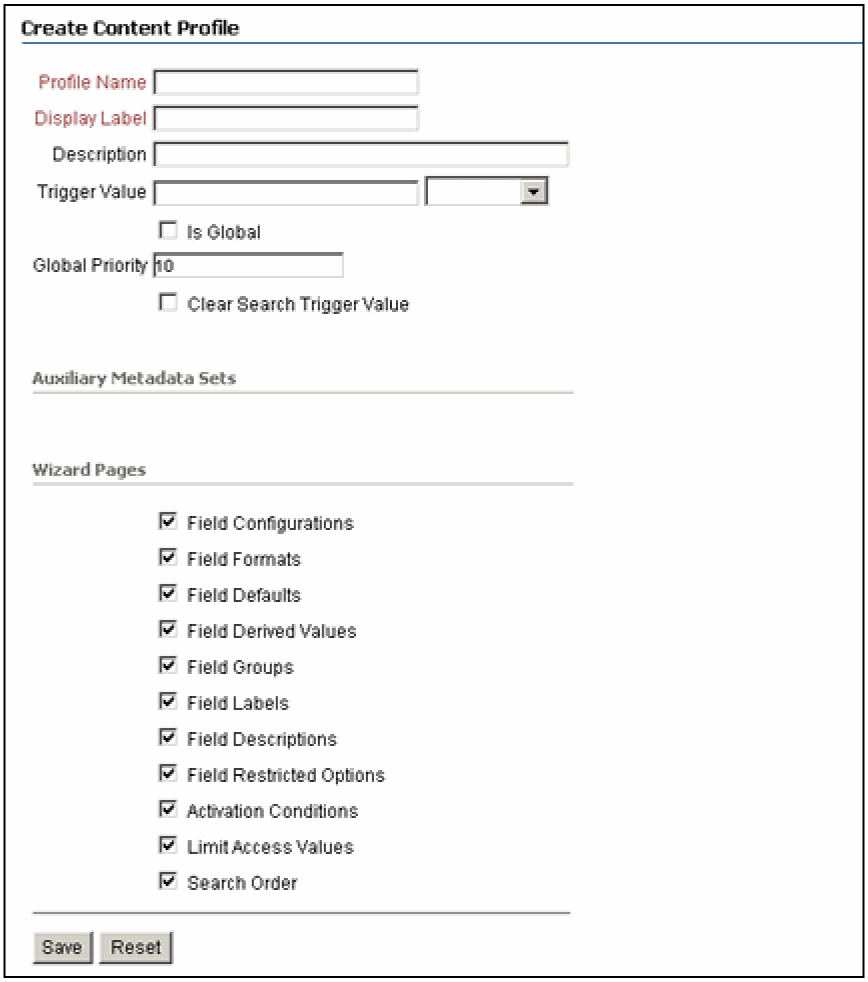


To access this page, click **Records** then **Configure** then **Simple Profiles** from the Top menu. Click the type of profile (content, retention category or folder). A similar action can be performed for physical profiles by clicking **Physical** then **Configure** then **Physical Profile**.

If you have administrative privileges an additional option appears. **Configure Metadata Sets** allows those users to access additional auxiliary metadata to use in configuring profiles.

A.12.2 Create/Update Simple Profile Page

This page is used to create or update a simple profile configuration and Wizard fields settings.



To access this page to create a new profile click **Create** then **Create Profile** on the Profile Listing Page. If you have administrative privileges, you can also click **Create** then **Create Global Profile**.

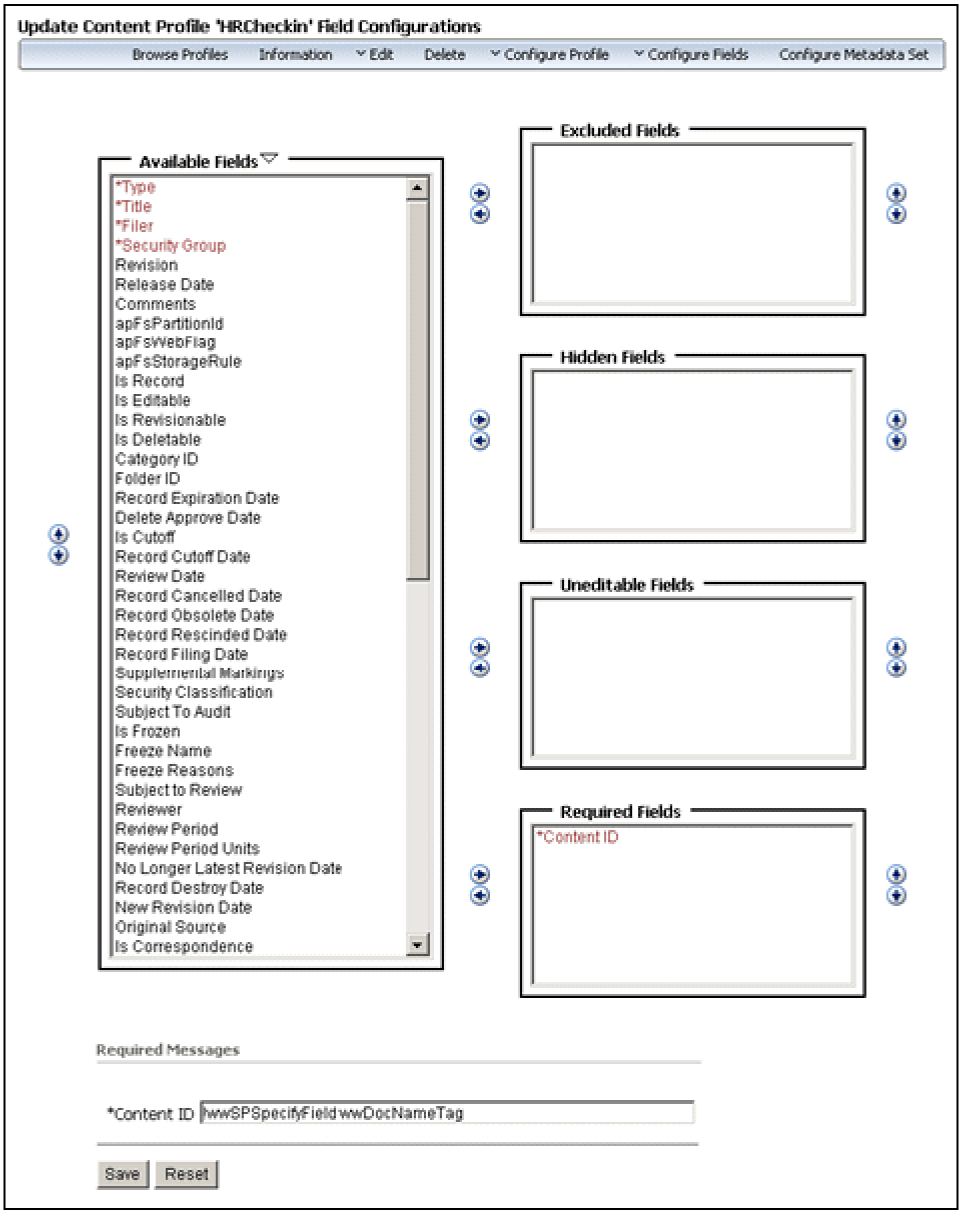
To update an existing profile click **Edit** then **Update** on the Page menu of a displayed profile or click **Update Profile** on the Actions menu of a profile.

Element	Description
Profile Name field	The unique profile name. (Required.)
Display Label field	The unique profile display label. (Required.)
Description field	The profile description.
Trigger Value field	The trigger value. Enter a value or select a value from the menu.
Is Global box	If checked, rules in this profile will be used globally. Global rules are those which are always evaluated, regardless of the criteria selected for the profile. If **Create Profile** was used to create the profile, the box is not selected. If **Create Global Profile** was used to create the profile, the box is selected.
Global Priority field	The number specifying the priority of field priority. Default: 10.

Element	Description
Clear Search Trigger Value box	If checked, clears the search trigger value field for global priority.
Auxiliary Metadata Sets boxes	If auxiliary metadata sets are available, they are listed. Select one or more of the auxiliary metadata sets to use with the profile.
Field Configurations box	Select to configure the field types for the profile. Default: YES.
Field Formats box	Select to set a field format for the profile. Default: YES.
Field Defaults box	Select to set default values for the profile. Default: YES.
Field Derived Values box	Select to set derived values for the profile. Default: YES.
Field Groups box	Select to specify group fields for the profile. Default: YES.
Field Labels box	Select to set labels for the profile. Default: YES.
Field Descriptions box	Select to set descriptions for the profile. Default: YES.
Field Restricted Options box	Select to restrict options for the profile. Default: YES.
Activation Conditions box	Select to set activation conditions for the profile Default: YES.
Limit Access Values box	Select to limit access to the profile. Default: YES.
Search Order box	Select to set a search sort order for the profile. Default: YES.
Save button	Required to start the Profile Configuration Wizard. Saves changes to the profile configuration and displays the Create/Update Simple Profile Page with the Simple Profile Field Configuration Page.
Reset button	Clears changes to the page and resets values to their defaults.

A.12.3 Simple Profile Field Configuration Page

This page is used to set the field types for a profile. This is only available to administrative users.



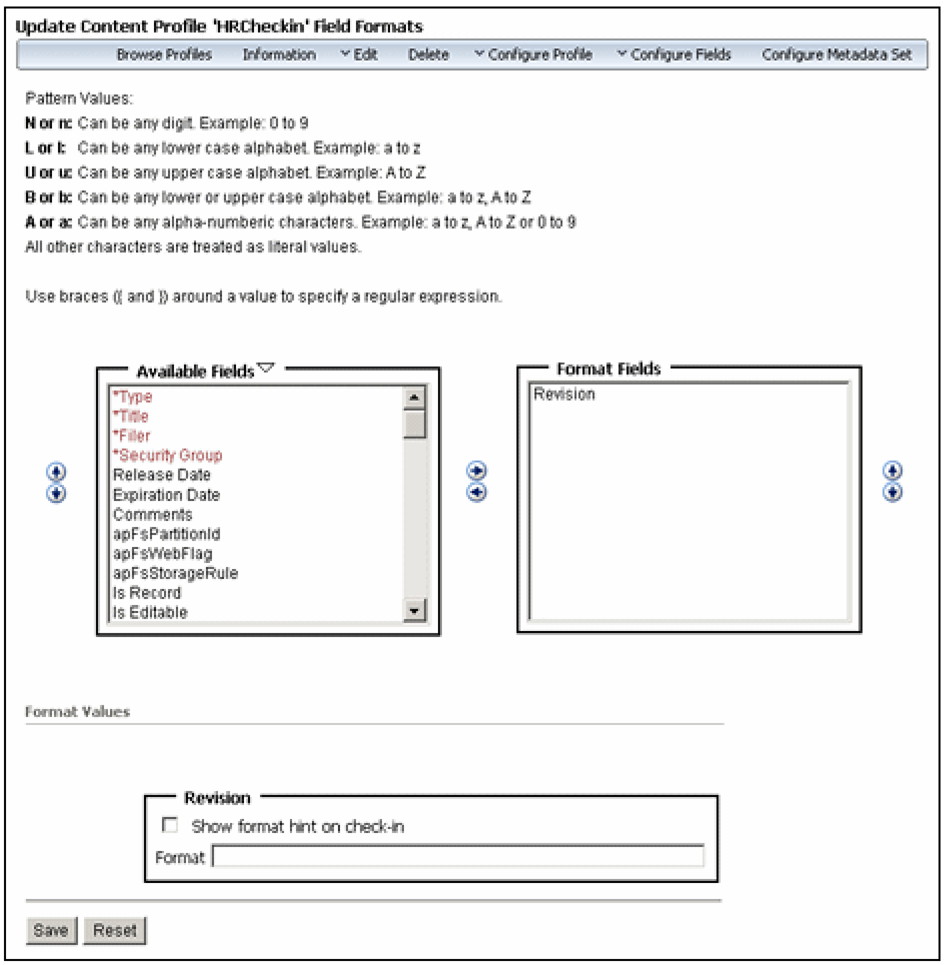
To access this page, click **Save** on the Profile Configuration Wizard to select **Field Configuration** or use the Page menu to select **Configure Fields** then **Field Configuration**.

Element	Description
Available Fields list	Available fields to be configured for the profile. Required fields are shown in red color with an asterisk to the side of the field name.
Excluded Fields list	To exclude a field from the profile, select the field name from the Available Fields box and click the arrow to move it into this box. Use the arrow to move the field name back into the Available Fields box.
Hidden Fields list	Used to hide a field from the profile. Select the field name from the Available Fields box and click the arrow to move it into this box. Use the arrow to move the field name back into the Available Fields box.

Element	Description
Uneditable Fields list	Used to make a field uneditable in the profile. Select the field name from the Available Fields box and click the arrow to move it into this box. Use the arrow to move the field name back into the Available Fields box.
Required Fields list	Used to make a field required in the profile. Select the field name from the Available Fields box and click the arrow to move it into this box. Use the arrow to move the field name back into the Available Fields box. When a field required, the field name and its code are displayed in the Required Messages list.
Required Messages list	When a field is selected to be required, the field name code is listed here. This can be edited.

A.12.4 Simple Profile Field Formats Page

This page is used to configure field formats for the current profile.



To access this page either select it through the Profile Configuration Wizard, or use the Page menu to select **Configure Fields** then **Field Formats**.

Each selected field can be assigned a specific format, such as alphabetical, numerical, or another format that enables the user to specify the type of information that the user can enter into the field when it appears on a form. Use braces { } around a value to specify a regular expression. Pattern values include the following:

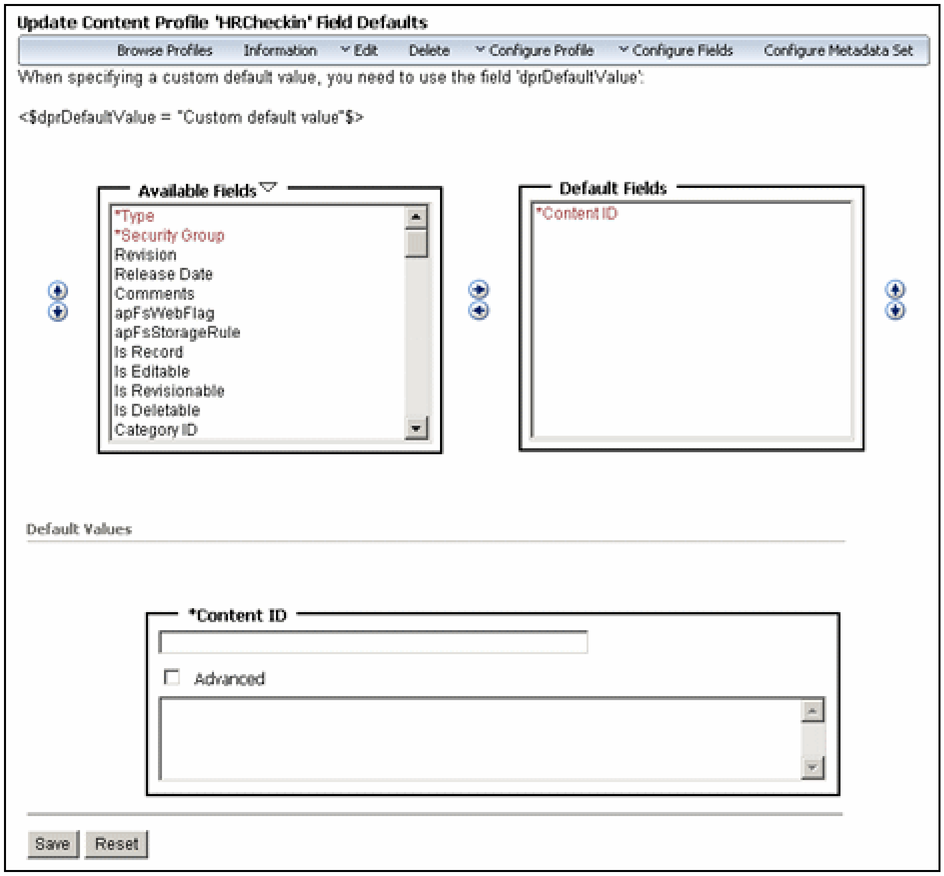
- **N** or **n**: Can be any digit. Example: 0 to 9.
- **L** or **l**: Can be any lowercase alphabet characters. Example: a to z.
- **U** or **u**: Can be any uppercase alphabet characters. Example: A to Z.
- **B** or **b**: Can be any lower- or uppercase alphabetic characters. Examples: a to z; A to Z.
- **A** or **a**: Can be any alpha-numeric characters. Example: a to z; A to Z; or 0 to 9.

All other characters are treated as literal values.

Element	Description
Available Fields list	Fields available to be formatted.
Format Fields list	Used to make a field formatted in the profile. Select the field name from the Available Fields box and click the arrow to move it into this box. Use the arrow to move the field name back into the Available Fields box.
Format Values fields	When fields are selected to be formatted fields, they are listed here. If the box for a field is empty, the profile will not show the field format. If the Show Format Hint On Check-In box is selected, the specified field format will be shown in the field to be completed by the user. Specify the format for each field to be formatted. Formats specify the type e of information that can be entered by the user when the field appears on a form.

A.12.5 Simple Profile Field Default Values Page

This page is used to configure field defaults for the current profile.

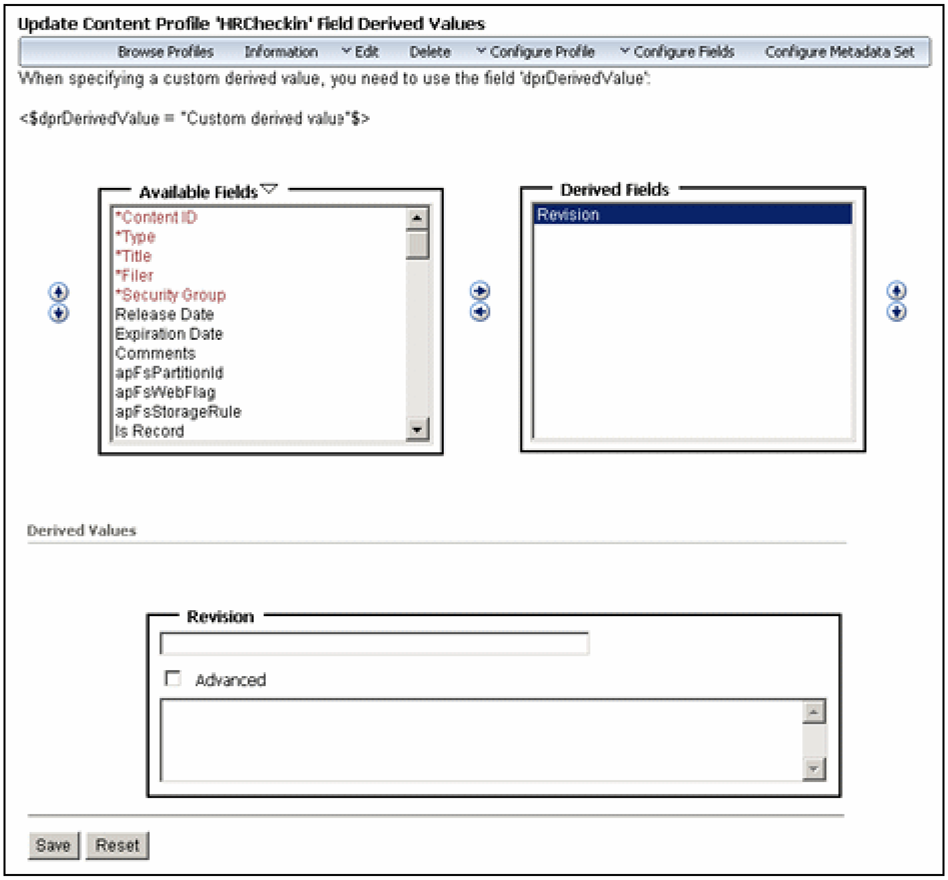


To access this page select it through the Profile Configuration Wizard, or use the Page menu to select **Configure Fields** then **Default Values**.

Element	Description
Available Fields box	Fields available to be configured.
Default Fields box	Default fields.
Default Values list	Lists each field in the Default Values list with a box and field. If the Advanced box for a defaulted field is empty, the profile will not replace the value for the field. If the Advanced box is selected, enter the Idoc Script value to be used as the field value after evaluation for both pre-submit and post-submit processing.

A.12.6 Simple Profile Field Derived Values Page

This page is used to configure field derived values for the current profile.

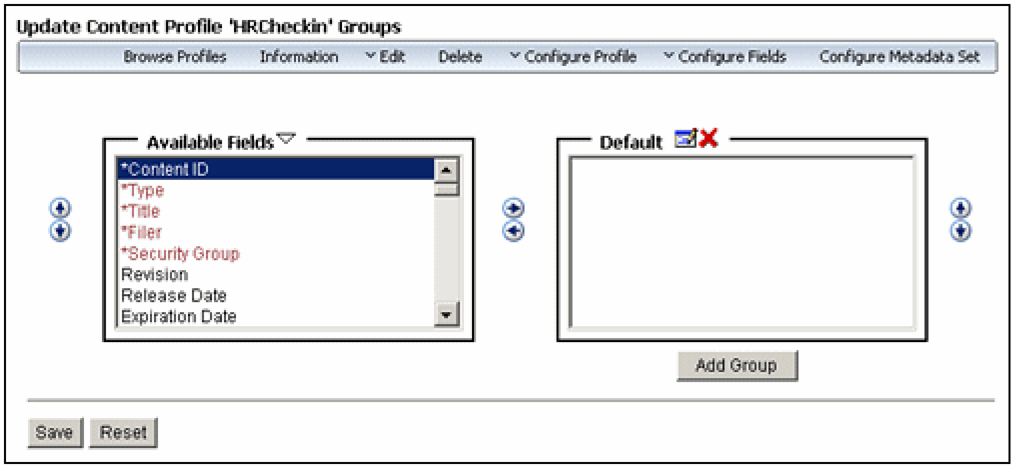


To access this page either select it through the Profile Configuration Wizard, or use the Page menu to select **Configure Fields** then **Derived Values**.

Element	Description
Available Fields list	The fields available to be configured.
Derived Fields list	Specified derived fields. Use the arrow icon to move selected available field to this list.
Derived Values list	Lists each field in the Derived Fields list with a box and field. If the Advanced box for a derived value is empty, the profile will not replace the derived value for the field. If the box is selected, enter a Idoc Script value. The value will be used after evaluation for both pre-submit and post-submit processing.

A.12.7 Simple Profile Field Groups Page

This page is used to configure field groups for the current profile.

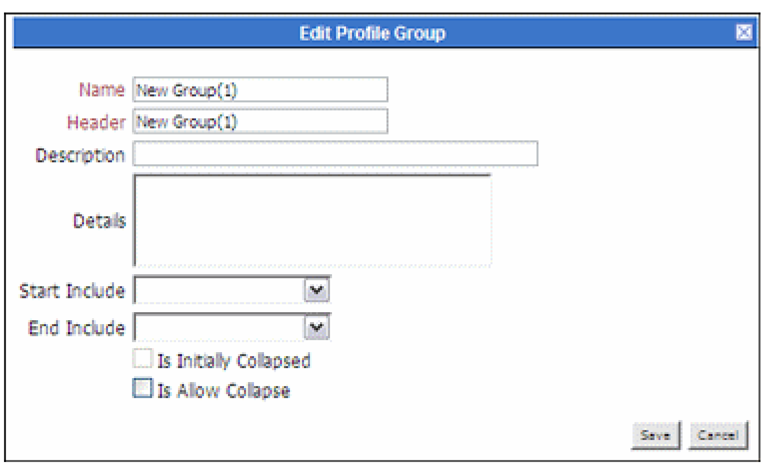


To access this page select it through the Profile Configuration Wizard, or use the Page menu to select **Configure Fields** then **Groups**.

Element	Description
Available Fields list	Lists available fields.
Default list	Lists fields to be placed in groups by default. Use the arrow icon to move fields from the Available Fields list to this list. Use the vertical arrows to sort the order of the fields in a group. To display a Edit Profile Group Dialog in which to enter group information, click the Group icon. To delete a group, click the red X icon by a Group field.
Add Group button	Displays the Edit Profile Group Dialog in which fields are added to create a new group. When the new group is created, it is displayed on the Groups page with the list of fields in the group.

A.12.8 Edit Profile Group Dialog

This dialog is used to specify the fields associated with an added group in the current profile.

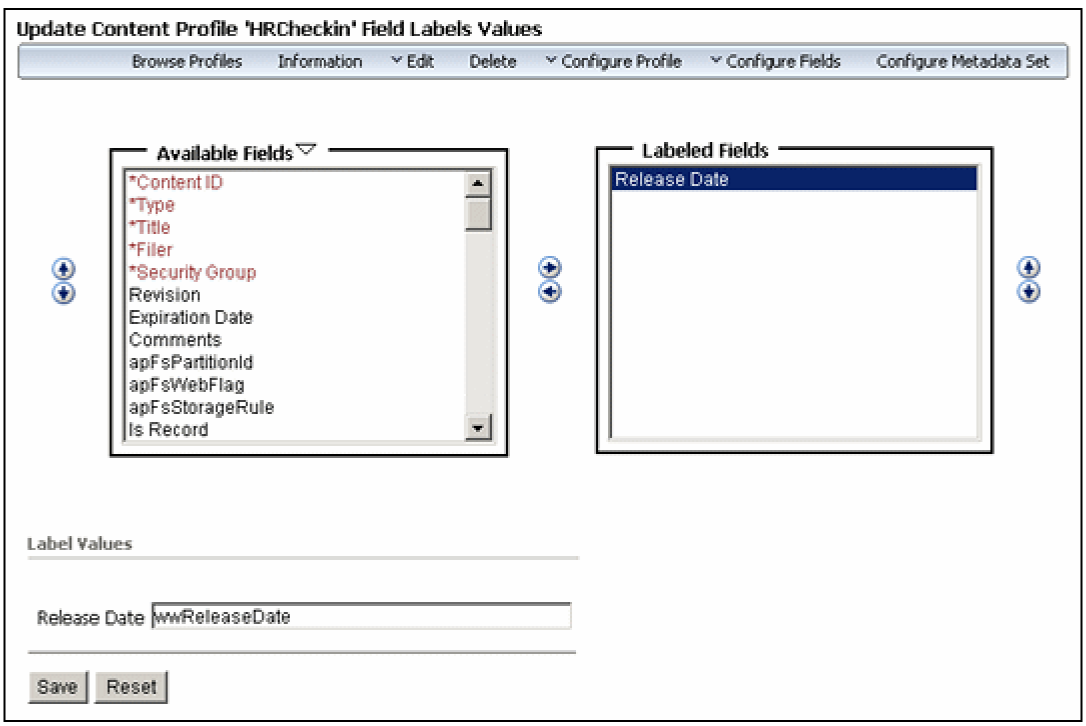


To access this dialog, first use the Page menu to select **Configure Fields** then **Groups**. On the Simple Profile Field Groups Page, click **Add Group** or click the Default group icon.

Element	Description
Name field	A name for the group. Required.
Header field	A header for the group. Required.
Description field	A description of the group.
Detail field	Details about the group. The details will be displayed in a tool tip.
Start Include/End Include	Designates the separator for the group.
Is Initially Collapsed box	Select this box to enable groups to be initially collapsed and not fully displayed on the profile page for the user.
Is Allow Collapse box	Select this box to enable users to manage the collapse behavior of a group (expand or collapse).

A.12.9 Simple Profile Field Labels Page

This page is used to configure field labels for the current profile.



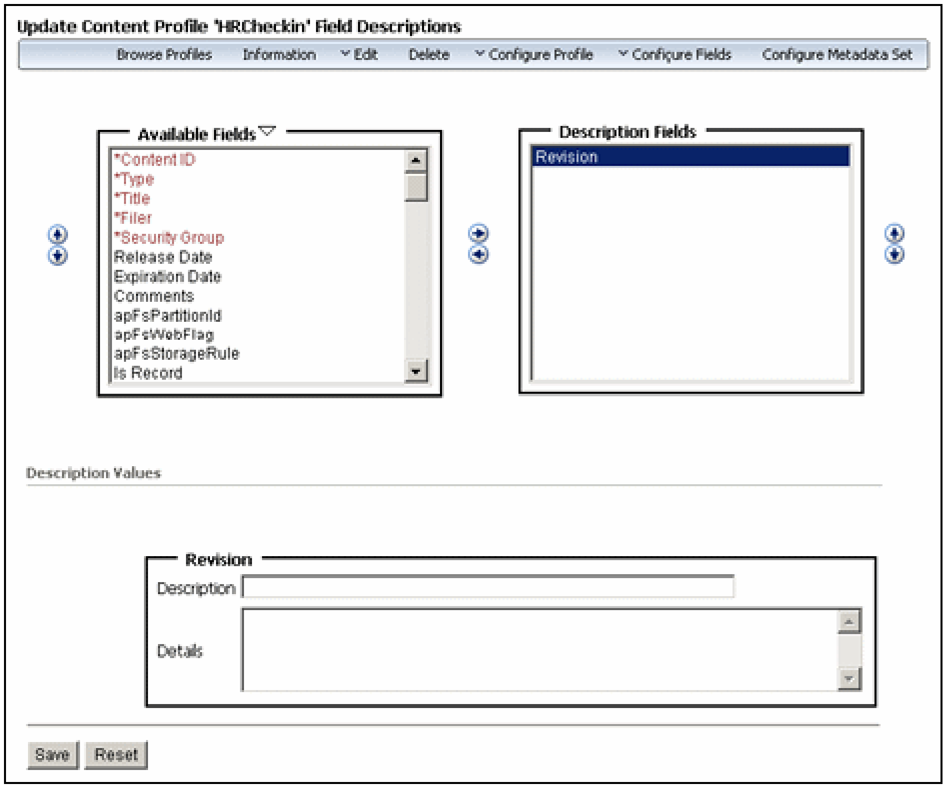
To access this page select it through the Profile Configuration Wizard, or use the Page menu to select **Configure Fields** then **Labels**.

Element	Description
Available Fields list	Lists the available fields.
Labeled Fields list	Lists the fields to be given different labels. Use the arrow icon to move field from the Available Fields list to this list.

Element	Description
Label Values fields	Displays the default label value for each field moved to the Labeled Fields list. Use the field to replace the default label with a different label.

A.12.10 Simple Profile Field Descriptions Page

This page is used to configure short and long field descriptions for the current profile.

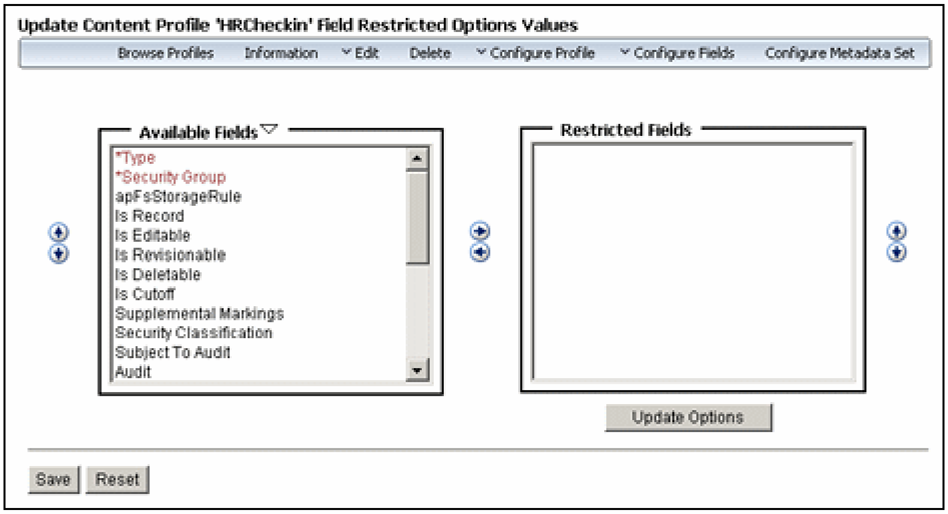


To access this page select it through the Profile Configuration Wizard, or use the Page menu to select **Configure Fields** then **Descriptions**.

Element	Description
Available Fields list	Lists available fields.
Descripted Fields list	Lists fields to be given descriptions. Use the arrow icon to select fields from the Available Fields list and move them to this list. Use the vertical arrow icons to sort the order of the fields in this list.
Description Values fields	Displays the name of each field in the Descripted Fields list with the original field label, a field for a brief description, and a field for a detailed description. Enter information for the brief and detailed descriptions for each field.

A.12.11 Simple Profile Field Restricted Options Page

This page is used to specify the fields that have restricted option listings for the current profile.

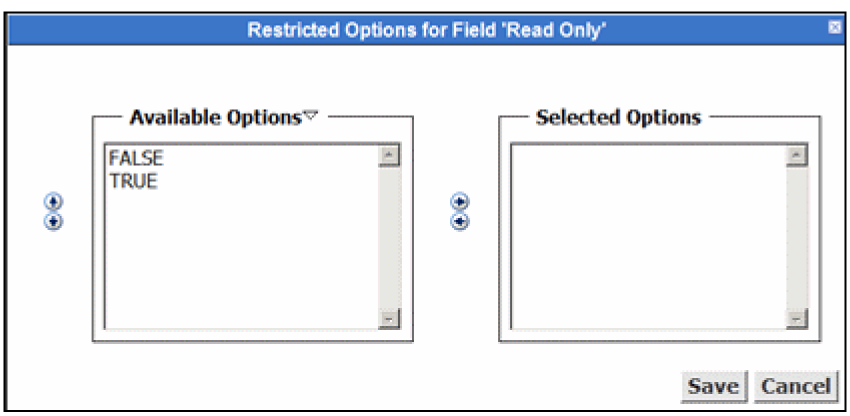


To access this page select it through the Profile Configuration Wizard, or use the Page menu to select **Configure Fields** then **Restricted Options**.

Element	Description
Available Fields list	Lists the available fields.
Restricted Fields list	Lists the fields that have restricted option listings. Use the arrow icon to move selected field from the Available Fields list to this list. Use the vertical arrows to sort the order in which the fields in this list.
Update Options button	Displays the Restricted Options Dialog. Use this dialog to specify what options are allowed and in what order. If this button is clicked without selecting a field, a prompt appears to select a field to update.

A.12.12 Restricted Options Dialog

This dialog is used to specify which available options are allowed for each field and in what sort order.

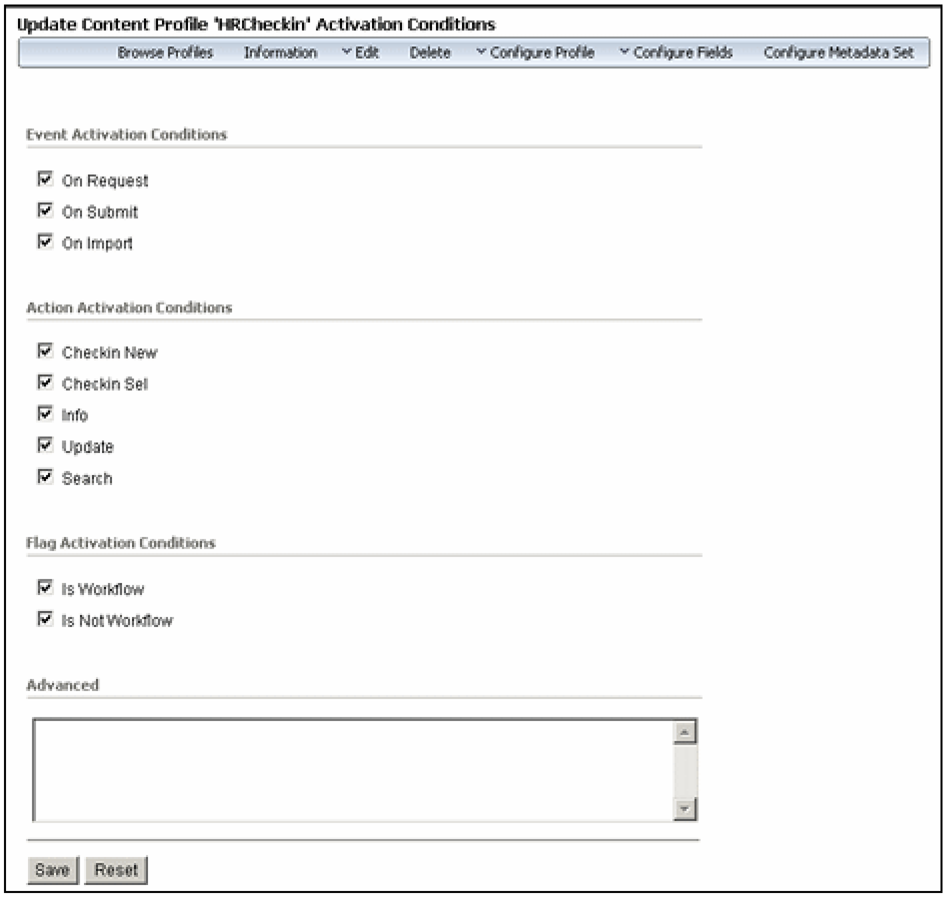


To access this dialog click the Update Options button on the Simple Profile Field Restricted Options Page.

Element	Description
Available Options list	List of available options for the field.
Selected Options list	List of options allowed in the restricted field.

A.12.13 Simple Profile Activation Conditions Page

This page is used to specify when the profile is activated based on the defined conditions.



To access this page either select it through the Profile Configuration Wizard or use the Page menu to select **Configure Profile** then **Activation Conditions**.

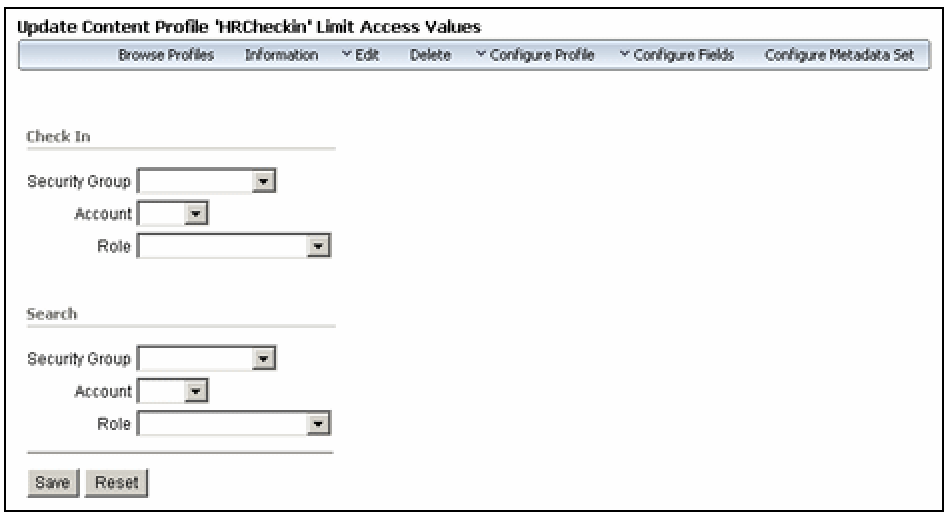
By default, all activation condition fields are selected; the user must uncheck the conditions not wanted in the profile.

Element	Description
Event Activation Conditions: On Request box	Activates the profile when the request event occurs.
Event Activation Conditions: On Submit box	Activates the profile when the submit event occurs.
Event Activation Conditions: On Import box	Activates the profile when the import event occurs.
Action Activation Conditions: Check In New box	Activates the profile when the Check In New content action occurs.

Element	Description
Action Activation Conditions: Check In Selected box	Activates the profile when the Check In Selected content action occurs.
Action Activation Conditions: Info box	Activates the profile when the Info content action occurs.
Action Activation Conditions: Update box	Activates the profile when the Update content action occurs.
Action Activation Conditions: Search box	Activates the profile when the Search content action occurs.
Flag Activation Conditions: Is Workflow box	Activates the profile when the Is Workflow flag is tripped.
Flag Activation Conditions: Not Workflow box	Activates the profile when the Is Not Workflow flag is tripped.
Advanced field	Enter Idoc Script that is associated on a profile level or field level with the profile. It is activated when the profile is submitted.

A.12.14 Simple Profile Limit Access Values Page

This page is used to restrict the personalization links for the current profile.



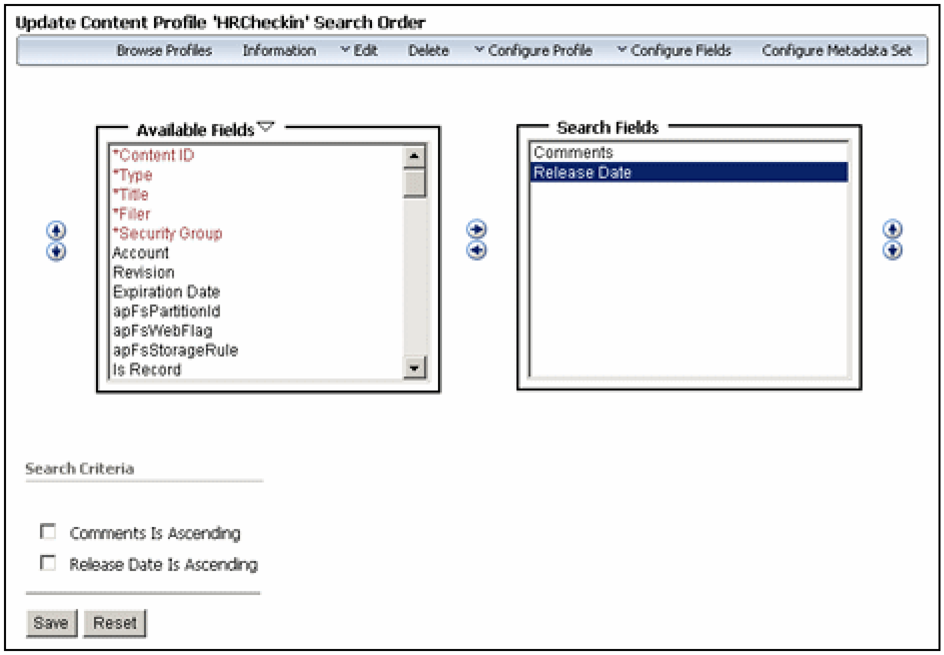
To access this page select it through the Profile Configuration Wizard, or use the Page menu to select **Configure Profile** then **Limit Access**.

Element	Description
Check In: Security Group menu	Select a security group. The profile's Check In link is limited to this security group.
Check In: Account menu	Select an account. The profile's Check In link is limited to this account.
Check In: Role menu	Select a role. The profile’s Check In link is limited to this role.
Search: Security Group menu	Select a security group. The profile's Search link is limited to this security group.
Search: Account menu	Select an account. The profile's Search link is limited to this account.

Element	Description
Search: Role menu	Select a role. The profile's Search link is limited to this role.

A.12.15 Simple Profile Search Order Page

This page is used to specify the search order and direction for fields in the current profile.



To access this page select it through the Profile Configuration Wizard, or use the Page menu to select **Configure Profile** then **Search Order**.

Element	Description
Available Fields list	Lists available fields that can be specified for search order and direction.
Search Fields list	Lists field to be specified for search order and direction. Use the arrow to move field names into this list and use the vertical arrows to sort them in the desired order for searching.
Search Criteria list	Displays each field in the Search Fields list with a box. Check the box to specify if the field should be searched in ascending order.

A.12.16 Actions Menu

The Actions menu is used to access many menu selections that also can be accessed from the Page menu on a Simple Profile Information Page to view and manage profiles.

The Actions menu is accessed via the Actions icon, which is displayed for each profile on the Profile Listing Page.

Menu Item	Description
Profile Information	Displays the Simple Profile Information Page.
Update Profile	Displays the Create/Update Simple Profile Page.
Delete Profile	Deletes the currently displayed profile.

A.12.17 Profiles Page Menu

The Page menu is used to access menus and options for configuring an existing profile and configuring a metadata set.

Element	Description
Browse Profiles option	Shows the Profile Listing Page which lists all available simple profiles.
Information option	Shows the Simple Profile Information Page for the current profile.
Edit menu	Provides access to these functions: ▪ Update Profile: Shows the Create/Update Simple Profile Page. ▪ Copy Profile: Shows the Copy Simple Profile Page. ▪ Move to Configuration Manager (Administrators only): Shows the Copy Simple Profile Page.
Delete option	Deletes the currently displayed profile.
Configure Profile menu	Provides access to these configuration functions: ▪ Activation Conditions: Shows the Simple Profile Activation Conditions Page. ▪ Limit Access: Shows the Simple Profile Limit Access Values Page. ▪ Search Order: Shows the Simple Profile Search Order Page.
Configure Fields menu	Provides access to these configuration functions: ▪ Field Configurations: Shows the Simple Profiles Trigger Configuration Page (Administrators Only). ▪ Formats: Shows the Simple Profile Field Formats Page. ▪ Defaults: Shows the Simple Profile Field Default Values Page. ▪ Derived Values: Shows the Simple Profile Field Derived Values Page. ▪ Groups: Shows the Simple Profile Field Groups Page. ▪ Labels: Shows the Simple Profile Field Labels Page. ▪ Descriptions: Shows the Simple Profile Field Descriptions Page. ▪ Restricted Options: Shows the Simple Profile Field Restricted Options Page.

Element	Description
Create option	Provides two options: Create Profile and Create Global Profile. Either selection displays the Create/Update Simple Profile Page for creating a new profile or global profile.
Configure Metadata Set option	(Administrators only) Provides access to the Simple Profiles Trigger Configuration Page (Administrators Only) for selecting or changing the trigger field for profiles.

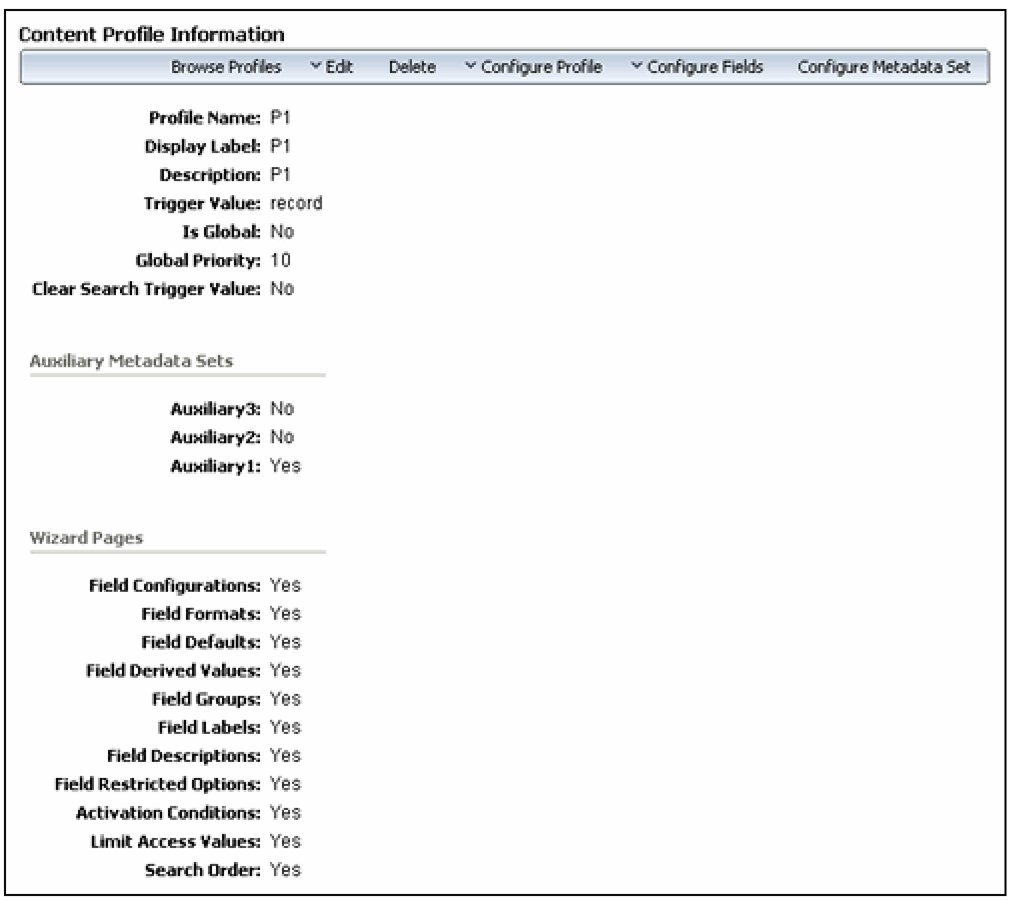
A.12.18 Wizard Page Menu

The Wizard Page menu is used to move between pages when using the Wizard to create or update a profile configuration.

This menu enables a usr to select any of the available configuration options and move directly to the page for the option. The arrows enable the user to scroll forward or backward one page with each click.

A.12.19 Simple Profile Information Page

This page is used to view summary information about a content profile.



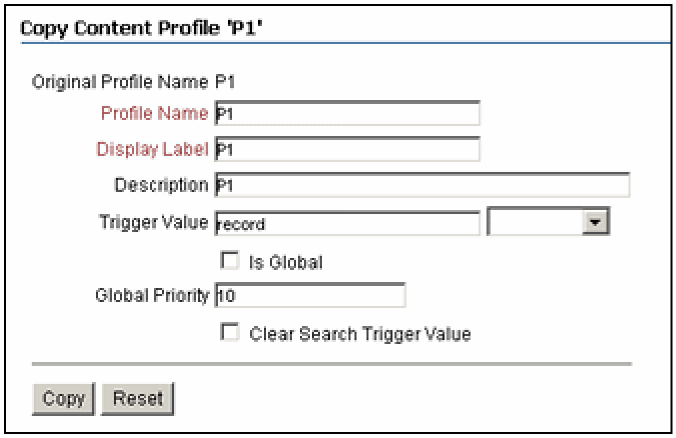
To access profile information do one of the following:

- Click the Actions menu for a profile listed on the Profile Listing Page, then select **Profile Information**.
- Click the Info icon for a profile listed on the Profile Listing Page.

Element	Description
Profile Name field	Displays the profile name.
Display Label field	Displays the profile display label.
Description field	Displays a description of the profile.
Trigger Value field	Displays the trigger value for the profile.
Is Global box	Shows whether the trigger is global or specific to a user.
Global Priority field	Displays a number that specifies the field priority.
Clear Search Trigger Value field	Indicates that the Search page does not use the profile's trigger value.
Auxiliary Metadata Sets	Lists available auxiliary metadata sets. Indicates whether a set been selected as a source for metadata.
Field Configurations field	Displays whether fields types are configured. .
Field Formats field	Displays whether field formats for the profile are configured.
Field Defaults field	Displays whether default values are configured.
Field Derived Values field	Displays whether derived values are configured.
Field Groups field	Displays whether group fields are configured.
Field Labels field	Displays whether labels are configured.
Field Descriptions field	Displays whether descriptions are configured.
Field Restricted Options field	Displays whether options to be restricted are configured.
Activation Conditions field	Displays whether activation conditions for the profile are configured.
Limit Access Values field	Displays whether access limits for the profile are configured.
Search Order field	Displays whether the search sort order is configured.

A.12.20 Copy Simple Profile Page

The Copy Simple Profile page is used to copy the fields and values in the current profile to a new profile.

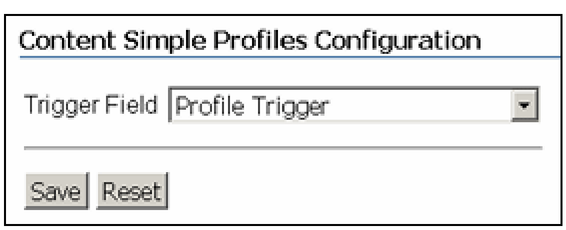


To access this page, open a simple profile, then from the Page menu select **Edit** then **Copy Profile**.

Element	Description
Original Profile Name	Shows the name of the profile to be copied.
Profile Name field	Enter the unique profile name of an existing profile. Required.
Display Label field	Enter the unique display label of an existing profile. Required.
Description field	Enter a new description for the copied profile or use the existing description copied from the original profile.
Trigger Value field	Choose to use the same trigger value as the source profile, or select a trigger value from the menu.
Is Global box	Indicates if this is a global profile.
Global Priority field	The priority of the profile.
Clear Search Trigger Value box	The trigger field to use in a search.
Copy button	Copies the profile to another profile.
Reset button	Clears the fields of information.

A.12.21 Simple Profiles Trigger Configuration Page (Administrators Only)

This page is used to select or change the trigger field for all profiles of the current type.



To access this page, click **Configure Metadata Set** on the Page menu.

Caution: The trigger field can be changed. However, when it is changed, profiles may become invalid and it is the responsibility of the administrator to resolve the situation. The user interface provides hints about invalid profiles.

Element	Description
Trigger Field menu	Select a trigger field from the list of metadata fields that are defined as options for the current type.
Save button	Saves the selected trigger field.
Reset button	Clears changed information.

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