

Oracle Universal Content Management 10.1.3

Document Management Quick Start Tutorial

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Before you begin

Before you begin reading this document or installing the Document Management modules distributed as part of Universal Content Management (UCM), you must first install the Content Server and additional modules distributed with it. These modules include:

- Content Server and Extras
- Content Server Extras
- Dynamic Converter
- Desktop Integration Suite
- Content Integration Suite
- Legacy Integration (Kofax Ascent Capture integration)

Please review the Content Server Quick Start Tutorial available on OTN. Install the Content Server and its modules before proceeding with the modules covered in this document. The guide can be found at:

<http://www.oracle.com/technology/products/content-management/cdbs/cs.html>

UCM - Document Management modules

Oracle Universal Content Management offers the following modules that extend the Content Server's document management capabilities:

CONTENT TRACKER

Content Tracker monitors your system and records information from various activities. This information is collected from various sources, then merged and written to a set of tables in your Content Server database. You can customize Content Tracker to change or expand the types of information it collects. Content Tracker monitors activity from:

- Content Item Access
- Content Server Services

CONTENT CATEGORIZER

Content Categorizer allows for metadata extraction from documents, and for metadata generation based on document contents.

REPORT PARSER

Report Parser allows the Content Server to parse ASCII reports from a mainframe or a report generator and convert them to text, PDF, HTML or XML

WEB PARTS FOR MICROSOFT SHAREPOINT

This module includes web parts and WSDL files for integration with Microsoft SharePoint.

Product Downloads

Once you have installed and configured the Content Server and the modules delivered with it, you are now ready to download the install the Document Management modules.

The Document Management modules are contained in a zip file that can be downloaded from Oracle Technology Network. Links to download the file are available on the same page from where you downloaded this document.

The file name for the Document Management zip file will be in the following format: UCM_DocMan_10gR3_<date>.zip, where <date> represents the date the product was released (e.g. 20070416)

The modules contained in that zip are meant for all platforms supported by the Content Server. This zip file contains the following items:

- ContentCategorizer_10gR3_<date>.zip
- ContentTracker_10gR3_<date>.zip
- ReportParser_10gR3_<date>.zip
- WebPartsWsdls_10gR3_<date>.zip
- ContentServerWebParts_10gR3_<date>.zip

where <date> is the product release date (e.g. 20070406).

Installation Overview

These instructions are based on the 10.1.3 release of Oracle Universal Content Management's Document Management modules and are aimed at installing a *desktop development environment* or *test-drive environment*.

IMPORTANT: *It is highly recommended that you refer to the product Installation Guides for latest compatibility information. Please ensure that you have read that document before proceeding to do any production environment installation. Please see Appendix I for a link to online documentation.*

PREREQUISITES

Please ensure that you have installed all the modules listed in the “Before you begin” section on page 3 of this document.

General Installation Process

A complete Document Management installation will involve installing each of the modules included with it individually. Thus, you will need to:

- Install and configure Content Tracker.
- Install and configure Content Categorizer.
- Install and configure Report Parser. Note: This is only required if you wish to parse ASCII reports from a mainframe or a report generator, and convert them to text, PDF, HTML or XML. Please refer to the Installation Guide included with the product download for information on this.
- Install and configure Web Parts for SharePoint. Note: This is only required if you wish to integrate Oracle Universal Content Management with Microsoft SharePoint. Please refer to the Installation Guide included with the product download for information on this.

INSTALLING CONTENT TRACKER

Once you have verified that the pre-requisites outlined above have been met, you can now install the Content Tracker.

- Here are some points to consider before you install the Content Tracker:
 - If you have installed an Oracle Database and have it configured for Unicode, then you should refer to **page 1-7** of the Content Tracker Installation Guide to make appropriate configuration changes during the installation process.
 - If you are using Oracle Database Express Edition, configure it to accept at least 15 connections.
 - Install the Sun Java Plugin for your web browser so that you can run administration applets.

Now you can proceed to the install:

- Once you have downloaded the Document Management zip file and extracted it to a temporary locations, extract the `ContentTracker_10gR3_<date>.zip` file to a temporary location.
- You will find the following items in there;
 - `ContentTracker.zip`
 - `ContentTrackerReports.zip`
 - Installation Guide (PDF)
 - Administration Guide (PDF)
- First, you need to install `ContentTracker.zip` on to the Content Server. The easiest way to do this is by running the Component Wizard utility.

- On Windows, the `Component Wizard` utility can be launched from `Start → Programs → Oracle Content Server → <Instance Name> → Utilities → Component Wizard`
- On Unix, the `Component Wizard` utility can be launched by running the `<installDir>/<instanceName>/bin/ComponentWizard`.
- When prompted, log in as `sysadmin` using the appropriate password. Default password for `sysadmin` is `idc`.
- Once you have launched `Component Wizard`, click on the ‘Install...’ button
- When prompted, click the ‘Select...’ button to select the `ContentTracker.zip` file from the directory where you extracted it.
- Click the ‘OK’ button.
- The ‘Edit Preferences’ dialog will be displayed. Enter the information as follows:
 - Maximum Characters for URL length: 3000 (default) (NOTE: If you have an Oracle database instance configured to be Unicode, change this to 2000. If you are using UTF-8, set this to 1333. See Installation Guide for recommendations on other databases.)
 - Max Characters for Content Server Proxy instance name: 50 (default)
 - Data Connection Synchronization Lock Port: 4477 (default) (NOTE: Change this if you know that port is not available on your machine).
 - Name of executable to run after data reduction: Leave Blank
- Click ‘OK’
- You will be asked if you want to enable the component. Click ‘Yes’.
- Next, install the `ContentTrackerReports.zip` component.
- The general process for installing this component is the same as what you followed for `ContentTracker.zip`. However, the questions on the ‘Edit Preferences’ dialog will be different, and you should enter values as follows:
 - Security Checks on Queries: Yes (check the box)
- You will be asked if you want to enable the component. Click ‘Yes’.
- A manual restart of the Content Server is required after the installation of the components.
- You can restart the Content Server via the Admin Server (see instructions on page 14-15 of the Content Server Quick Start Guide). On Windows, if you installed the content server as a service, use the Windows Service Manager utility to restart the content server instance. On Unix, you can restart the content server by running `<installDir>/<instanceName>/etc/idcserver_restart`
- Installation is now complete. To learn how to start using Content Tracker, please refer to the Content Tracker Administration Guide. It is included in the `ContentTracker.zip` file.

INSTALLING CONTENT CATEGORIZER

This module is only required if you want Content Server to extract metadata from document properties, or generate metadata values based on contents of documents. Please refer to the Content Categorizer Installation Guide (included with the product download) for full list of platform requirements, prerequisites and other installation details. To install the software:

- Extract the ContentCategorizer_10gR3_<date>.zip file to a temporary directory location. In the extracted directory, you will find:
 - ContentCategorizer_aix.zip – Component for AIX
 - ContentCategorizer_hpux.zip – Component for HPUX
 - ContentCategorizer_linux.zip – Component for Linux
 - ContentCategorizer_si3.zip – Component for Solaris x86
 - ContentCategorizer_sol.zip – Component for Solais
 - ContentCategorizer_win32.zip – Component for Windows
 - ContentCategorizer_zlinux.zip – Component for zLinux
 - AddCCToArchiveCheckin.zip – Optional component to categorizer content when it is archived in using the Batchloader utility.
 - AddCCToNewCheckin.zip – Optional component to automatically categorize content when it is checked in via WebDAV or through normal web page. By default, users can categorize content by clicking the “Categorize” button on the check in form before checking the content in.
- Determine the correct component for your Content Server platform. Then, you can install the component by using Component Manager in Admin Server. To do this:
 - Log in to the Content Server instance and the administrator (sysadmin)
 - Expand the Administration Tray, and click on “Admin Server”
 - On the page that loads, click the button for the desired Content Server instance.
 - On the left navigation, click on “Component Manager”
 - On the page that loads, click the “Browse...” button and select the appropriate zip file.
 - Click “Install”
 - On the next page, click “Continue”
 - The installation confirmation page will be displayed. Click “Enable this component and restart the Content Server”.
 - On the page that loads, click the Play icon to restart your content server instance.

- You can install either of the optional components using this same method.
- Once the product has been installed and configured, you need to create the appropriate categorization rules using the Content Categorizer.
- First, to verify that Content Categorizer is working correctly, with its internal XML conversion formats, do the following:
 - Log into the Content Server as the administrator (sysadmin)
 - Expand the Administration Tray and click on the “Content Categorizer Administration” link.
 - Click on the Content Categorizer icon. The admin utility will load.
 - On the ‘Configuration’ tab:
 - Select secXMLConversion property and click ‘Edit’
 - Select ‘Flexiondoc’ or ‘SearchML’ from the drop down list, and click Ok.
 - Go to the ‘Rules’ tab.
 - Select ‘DocTitle’ from the Field option list and click ‘Add.’
 - Select TAG_TEXT (default) from the Rule option list.
 - In the ‘Key’ field, enter ‘scc_title’, and click Ok.
 - Click Ok to save the changes and close the admin utility.
 - Go to the New Check In form (from the top navigation) and select the Wellington_WordStyle.doc from the “CC_Samples” directory that is under the <installDir>/<instanceName>/custom/ContentCategorizer directory.
 - Click the “Categorize” button and allow time for processing.
 - “Wellington Letter to Whitehall” should appear in the Title field.
- For further, information on how to configure Content Categorizer, please refer to the Installation Guide and the Administration Guide included in the product download.

Please refer to the Installation Guide included with Report Parser and Web Parts for Microsoft SharePoint downloads for information on how to install and configure them.

Appendix I

All product documentation files are available in the product zip files that you download from OTN. They can also be found online at the following location:

http://download.oracle.com/docs/cd/E10316_01/index.htm