

Oracle Files: Migrating to Oracle Files

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INTRODUCTION

Oracle Files, a component of Oracle Collaboration Suite, leverages the power of the Oracle9i database and application server to provide a reliable, scalable, and secure place to store all of your content. Oracle Files is an important tool for every enterprise. It provides universal access to files through familiar interfaces to a secure, reliable, and scalable central file server. It provides enhanced content management features that enable your users to organize their files for ready access, while providing advanced search capabilities that enable them to find their files wherever they are located. It provides enhanced collaboration features that let users share files, with changes reflected to all users instantaneously. Oracle Files is the one solution for all of your file management concerns.

MIGRATION PROCESS

Given all of the benefits of the application, how does an organization actually migrate to Oracle Files? Although such a migration might involve tens of millions of documents, and tens of thousands of users (like the instance inside of Oracle Corporation), migration can be done in a straightforward manner to ensure minimal downtime and few learning curve issues.

The migration process has four major steps:

1. Installing Oracle Files and associated infrastructure
2. Migrating users accounts and permissions to Oracle Files
3. Migrating content to Oracle Files
4. Training Oracle Files users

1. INSTALLING FILES AND INFRASTRUCTURE

Oracle Files is a component of the Oracle Collaboration Suite. The Collaboration Suite requires four major components to function:

- Oracle 9i Database
- Oracle 9i Application Server
- Oracle Collaboration Suite components

- Email
- Calendar
- Files
- Voicemail and Fax
- Ultrasearch
- Wireless and Voice
- Web Conferencing
- Oracle internet Directory (OiD)

For Oracle Files, one optional application is recommended:

- Oracle Workflow

Oracle Workflow is required for all workflow-related features in Oracle Files.

Oracle Files can be licensed as standalone product or as part of the Oracle Collaboration Suite. This document focuses on the Oracle Files component of the Collaboration Suite.

Installing the Oracle 9i Database is the first step in the process, as this is where the content will reside. Next, you install and configure the Oracle 9i Application Server, which enables communication between the Files application and the backend database. Finally, you install and configure the Files application with the rest of Oracle Collaboration Suite.

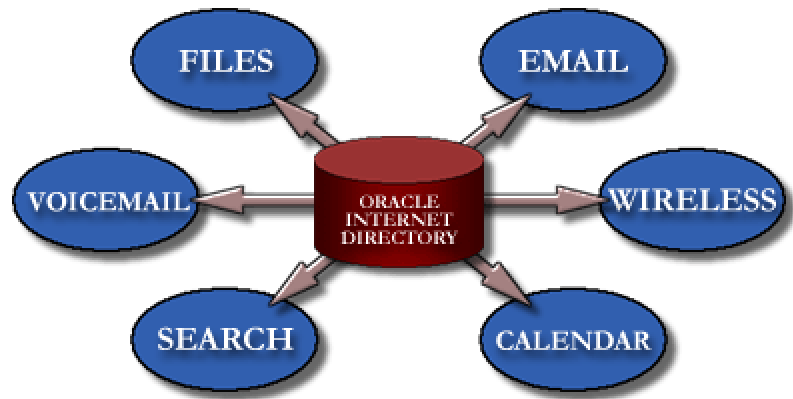
Oracle Files relies on OiD for user provisioning (as addressed in Section 2 below) and on Oracle Workflow for document routing and approval. Each of these applications supplements the Files application; they are installed last.

For more information on the Files installation process, please consult the Oracle Collaboration Suite Installation Guide.

2. MIGRATING USERS/PERMISSIONS TO ORACLE FILES

With Oracle Files installed and configured, user accounts must be migrated to Oracle Files.

Oracle Files provisions its users through Oracle internet Directory (OiD), a standards-based LDAP directory that serves the various components of the Oracle Collaboration Suite.



With OiD, users can be created or modified in one central location, and all of the Collaboration Suite components can update their respective user information in one step.

For Oracle Files, this means that customers with existing user provisioning tools can have those communicate with OiD to transfer user information to the Oracle Files user store. OiD has modules in place to interface with common non-Oracle permissions applications, making it an easy process to move users to Oracle Files.



For user permissions relating to content organization and authorization, Oracle Files relies on two concepts:

1. **Workspaces** (areas set up for users to collaborate)
Workspaces contain both public and private areas. Any member of the workspace can access information in the workspace private directories, while every user within Oracle Files has read-only access to the workspace's public content.

Roles inside of a workspace allow levels of usage control so that authorized users can edit documents while others can only view them. Those roles are:

- Administrator - Can modify the workspace member list and edit the content and properties of a workspace.

- Participant - Can edit the content of the workspace and can view the properties of the workspace.
- Viewer - Can view the content and properties of the workspace.

2. **Personal area** (an area set up for an individual user)

A personal area is set up for each individual user within Oracle Files. Much like workspaces, personal areas have both public and private areas.

The matrix of overall Files permissions is as follows:

| Content Area | Read-only access | Read/Write access |
|----------------------------------|---------------------|---|
| Workspace Permissions | | |
| Private Area | Workspace "Viewers" | Workspace "Admins", Workspace "Participants" |
| Public Area | Everyone | Workspace "Admins", Workspace "Participants" |
| Personal Area Permissions | | |
| Private Area | Only the individual | Only the individual |
| Public Area | Everyone | Only the individual |

Moving existing users and permissions into this Oracle Files framework is simplified through the use of Oracle Files tools:

- Oracle Files User Administration Tool
- Oracle Files Workspace Administration Tool
 - Oracle Files Workspace Creation Tool
 - Oracle Files Workspace Update Tool

The Oracle Files User and Workspace Administration Tools include eXtended Markup Language (XML)-based modules, which allow for bulk updates to user accounts and workspaces within the Oracle Files instance.

The User Administration Tool allows for quota modifications and other updates to personal accounts within Oracle Files.

The Workspace Administration Tool has two facets:

1. Workspace creation, for setting up new workspaces along with associated information/permissions
2. Workspace updating, for adjusting existing workspaces

In either facet of the Workspace Administration Tool, administrators/participants/viewers can be assigned, quota can

be allotted, workspace descriptions can be entered, etc., all in a bulk operation.

For more information on how these tools will be able to help your organization's migration to Oracle Files, please consult the Oracle Files Administration Guide.

3. MIGRATING CONTENT TO ORACLE FILES

With users and permissions populated in the Oracle Files instance, the next step is the migration of content to the Oracle Files repository. A major benefit of Oracle Files is that you can copy files over at whatever pace makes sense for your organization.

For example, Oracle Corporation's internal instance of Oracle Files, which now has terabytes of data stored on it, grew organically. Pilot organizations within Oracle Corporation were notified of the existence of the system and were encouraged, but not required, to use it. Over time, the value of the application accelerated adoption, and soon huge numbers of documents were being stored in Oracle Files. Eventually, Oracle Corporate management decided to require that most content be stored in Oracle Files for organizational simplicity. Even then, not all content was migrated at once, as project teams and users switched to Files when they felt ready for it.

Your organization can adopt Files as quickly or as slowly as it needs to. And when you are ready to move data over to Files, there are a variety of transfer options.

Oracle Files supports multiple access methods:

- HTTP (HyperText Transfer Protocol)
- WebDAV (Web-based Distributed Authoring & Versioning)
- FTP (File Transfer Protocol)
- SMB (Server Message Block)
- AFP (Apple File Protocol)
- NFS (Network File System)

These protocols provide users and administrators with a number of options for uploading data, although administrators can determine which protocols will be enabled when Files is installed.

Some of these protocols are more "lightweight" than others, and yet others can be scripted (for example, FTP) so scheduled migrations can occur over weekends or other slow times to ensure minimal impact on the organization's resources.

4. TRAINING ORACLE FILES USERS

The final step in the migration process involves training users to ensure that they are familiar with the functions that Oracle Files provides. The application is designed to be easy to use, so training requirements will be minimal.

Users can work with Oracle Files using their familiar Microsoft Windows interfaces, such as Windows Explorer, replicating their current file system experience. Users can edit their Microsoft Office documents "in place", opening them up from their Web Folder inside the Microsoft Windows Explorer list, making edits to them, and using the "Save" feature in Office.

Users can also work with their files in an intuitive Web interface, which offers additional value-added collaboration and workflow features.

For additional user training, the Web interface contains a comprehensive "Help" section that includes an introductory "Quick Tour" of Oracle Files.

CONCLUSION

Oracle Files is a robust, revolutionary product that can benefit all the users in an organization. Having successfully served over 40,000 employees inside of Oracle and hosted tens of millions of documents from one Oracle 9i Database, the application is clearly capable of providing your organization with a reliable file storage solution. The migration steps are straightforward and manageable.

Please contact an Oracle representative if you would like more information on acquiring and/or migrating to Oracle Files.



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