

IBM Record Manager Enabler (RME) for Content Manager V8.2 Fix Pack 4 Readme – April 23, 2004

Program Number 5724-B19

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1 About this readme file

This readme contains new information, known problems, and updates to the documentation in support of Records Manager Enabler for Content Manager (RME) Version 8.2.

1.1 Introduction

This readme document is the first document to read when setting up and installing fix packs for RME Version 8.2.

1.2 Who should read this readme file

Anyone who will be installing, configuring, and using the Records Manager Enabler for Content Manager (RME) should read this readme file.

The RME software enables IBM® DB2® Content Manager V8.2 Fix Pack 3 (Multiplatforms and z/OS) and several client applications, to integrate with IBM DB2 Records Manager V3.1.1, to provide a US DOD 5015.2-STD compliant electronic records management solution.

1.3 Ordering and support information

The Records Manager Enabler for Content Manager software is available upon request to any IBM DB2 Content Manager Version 8.2 (Multiplatforms and z/OS®) customers.

For ordering information, contact one of the IBM Content Manager sales representatives by clicking the **How to Buy** link on the following Content Manager product Web site:

<http://www.ibm.com/software/data/cm/cmgr/mp>

Ordering information on the DB2 Records Manager product can be found at the following Records Manager Web site:

<http://www.ibm.com/software/data/cm/cmgr/rm>

1.3.1 Obtaining support

For any questions, concerns, or problems related to IBM DB2 Records Manager Enabler for Content Manager, visit this Web site:

<http://www.ibm.com/software/data/cm/cmgr/mp/support.html>

For any questions, concerns, or problems related to IBM DB2 Records Manager, visit this Web site:

<http://www.ibm.com/software/data/cm/cmgr/rm/support.html>

At each website, you can browse or search many technical documents, including Frequently Asked Questions (FAQs), Hints and Tips, defects (APARs), and other important information.

1.4 License agreement

Please read the license agreement information in the following license files before downloading and using the Records Manager Enabler for Content Manager software. The English license files are in the same folder you find this readme file. The license files for other languages are available in the RME_install_folder \License folder after executing RME_Documentation.EXE.

LicenseInformation.txt	License Information
LicenseAgreement.txt	International Program License Agreement
LicenseInformation_xx.txt	License Information for "xx" country
LicenseAgreement_xx.txt	International Program License Agreement for "xx" country

1.5 How to send comments

Your feedback helps IBM to provide quality information. Please send any comment about this readme file or any RME publications by sending e-mail to comments@vnet.ibm.com.

2 Package content

The Records Manager Enabler for Content Manager electronic package contains the following installation components:

For Windows:

RME_CommonJava.EXE	Installs the Common functions for Java™ components
RME_CommonWin32.EXE	Installs the Common functions for Windows clients
RME_Documentation.EXE	Installs the RME Documentation
RME_eClient.EXE	Installs the RME support for CM eClient server
RME_IRMClient.EXE	Installs the RME support for Records Manager server
RME_Notes.EXE	Installs the RME support for Lotus Notes client

For AIX:

RME_CommonJavaAIX	Installs the Common functions for Java components
RME_eClientAIX	Installs the RME support for CM eClient server

For SUN:

RME_CommonJavaSUN	Installs the Common functions for Java components
RME_eClientSUN	Installs the RME support for CM eClient server

2.1 Documentation

You may want to first execute RME_Documentation.EXE to install the RME documentation on your system.

The RME_Documentation.EXE will install RME documentation in the Documentation folder of the RME install folder:

RMEINSTAL.pdf *Installing and Configuring the Records Manager Enabler, (GC18-7570-00), 96 pages*

RMEUGmst.pdf *User's Guide, (SC18-7570-00), 56 pages*

Detailed information about system and software requirements, installation and configuration instructions, can be found in the *Installing and Configuring the Records Manager Enabler* publication (RMEINSTAL.pdf).

The *User's Guide* (RMEUGMst.pdf) gives examples on how to use all of the RME client applications.

2.2 Updates to the RME documentation

This section contains changes to the publication, *Installing and Configuring the Records Manager Enabler*.

Chapter 3. Planning for Records Manager Enabler

Section "Software requirements", page 8: For the software requirements for Records Manager Engine and Client Server (Windows), change the following to indicate Fix Pack 3 instead of 2:

- IBM DB2 UDB Enterprise Edition Version 8.1 with Fix Pack 3

Also in Section "Software requirements", page 8: change all references to Content Manager components, such as IBM Content Manager Server Version 8.2 with Fix Pack 2, to Fix Pack 3.

Chapter 4. Installing Records Manager Enabler

Section "Installing the RME IRM Server component", page 18: Step 3: "Install RME_IRMClient.zip" should *not* be run. The new Step 3 should read as follows:

3. Unzip the self-extracting RME_IRMClient.exe file and run RMEUpdate.bat whenever an IBM Records Manager Fix Pack is installed.

Note: The following steps assume that the install directory for WebSphere® Application Server is c:\Program Files\WebSphere\AppServer.

To install the RME_IRMClient.exe file, unzip the RME_IRMClient.exe to the IRM Server install folder. For example, the IRM Server may be installed at C:\Program Files\WebSphere\AppServer\installedApps\[nodename]\IRMClientEAR.ear\IRMClient.war where [nodename] is the host name of the machine on which the WebSphere Application Server is running.

You must run the RMEUpdate.bat utility to update the IBM Records Manager struts-config.xml and tiles-def.xml files to support RME enhancements on the IRM server. You must run this utility whenever a fix pack is installed on the IBM Records Manager software.

This utility will update struts-config.xml and tiles-defs.xml which are located in WEB-INF directory. Backups of the existing struts-config.xml and tiles-defs.xml files will be created as: struts-config.xml.orig and tiles-defs.xml.orig.

To run the RMEUpdate.bat utility, follow these steps:

1. Stop the WebSphere application.
2. Open a Command window and change directory (cd) to:

```
C:\Program Files\WebSphere\AppServer\installedApps\[nodename]\IRMClientEAR.ear\IRMClient.war
```

where [nodename] is the host name of the machine on which the WebSphere Application Server is running.

3. Type the following and press Enter to add the RME enhancements:

```
RMEUpdate.bat C:\Progra~1\WebSphere WEB-INF
```

where C:\Progra~1\WebSphere is the WebSphere installation directory in short-name format and WEB-INF is the subdirectory (relative to the current directory) that contains struts-config.xml and tiles-defs.xml.

5. Type exit and press Enter to close the Command window.

Section "Deploying IRM logic extensions", page 21: Add the following new step after Step 6:

7. Click **Apply**.

Section "Installation of RME CM eClient server component", page 23: Modifications to the listed eClient JSPs are no longer needed. Strike-through the first bulleted item in Step 3. Install RME_eClient.zip. This item no longer needs to be completed because you must have already installed the required CM eClient V8.2 Fix pack 3, which includes these changes.

Section "Installation of RME CM eClient server component", page 24: The step "Adding RME servlets to the eClient server" is no longer necessary. Strike-through the complete step and continue to "Customizing the eClient server to support new MIME types" on page 25. This step no longer needs to be completed because you must have already installed the required CM eClient V8.2 Fix pack 3, which already includes these changes.

Section "Installing the RME CM Client component", page 25: This section no longer needs to be completed because you must have already installed the required CM Client V8.2 Fix pack 3, which already includes these changes.

Section "Configure RME components to communicate with CM server", page 34: Add the following note under **Utility usage**:

Note: This should be invoked within a Java-enabled environment such as the EIP Development Window. Also, you should change directory to where the cmbicmenv.ini file resides (for example, c:\Program Files\IBM\CMgmt) so the updates overwrite the existing files.

Chapter 5. Configuring Records Manager Enabler system

Section "Using RMECMSSetup tool to set up the CM server", page 43: For Step 3, if you have more than one CM server, you must use the same RMEAdmin password for each CM server.

Section "Managing RME configuration information", page 46: Add the following note under the graphic of the RME Configuration Tool:

Note: Only the **DB2 Records Manager Server** button is enabled the first time you login to the RMEconfig tool. The other buttons are enabled after you input and save the information specified when using the **DB2 Records Manager Server** button.

2.3 NLS Documentation

The RME documentation is available in the following languages:

- English (en)
- French (fr)
- German (de)
- Japanese (ja)
- Korean (ko)
- Brazilian Portuguese (pt)
- Simplified Chinese (zh)
- Traditional Chinese (zh_TW).

When you install the RME_Documentation.EXE file, the PDF and HTML versions of the NLS documentation are available in the following folder:

RME_install_folder\Documentation\PDF folder
RME_install_folder\Documentation\HTML folder

In the PDF and HTML folder, each country will have their own folder with the two characters country code as the folder name:

Country code	Country
en	English
de	German
fr	French
ja	Japanese
ko	Korean
pt	Brazilian Portuguese
zh	Simplified Chinese
zh_TW	Traditional Chinese

Notes:

- The RME User's Guide (rmeug) is available in the above 8 languages.
- The RME Installing and Configuring the Records Manager Enabler book (rmeinst) is available only in English, Japanese, Korean, and Brazilian Portuguese.
- The RME documentation is NOT translated to Italian or Spanish.

2.3.1 PDF version

You can read the PDF documentation by using the Adobe Acrobat reader.

2.3.2 HTML version

You can open the HTML files by using one of the web browsers:

rmeugmst.htm	Contains the cover page for the RME User's guide
rmeugmst02.htm	Contains the Table of Contents and links to all the chapters
rmeinstal.htm	Contains the cover page for the <i>Installing and Configuring the Records Manager Enabler</i> publication
rmeinstal02.htm	Contains the Table of Contents and links to all the chapters

3 Updates to installation procedures

To install the RME Fix pack 3, follow the installation steps in Chapters 4 and 5 of *Installing and Configuring the Records Manager Enabler* while noting the documentation changes described in Section 2.2 “Updates to the Documentation” on page 4 of this document.

The RME installation procedure has been simplified by replacing the RME component zip files (RME_XXXXXX.zip) with self-extracted files (RME_XXXXXX.EXE). This fix pack is a complete product refresh. That is, you must replace the existing files when the new files are extracted from the zip files.

The following is the mapping of the RME_XXXXXX.zip files to the RME_XXXXXX.EXE files:

Zip file names	Self-extracted file names
RME_CommonJava.zip	RME_CommonJava.EXE
RME_CommonWin32.zip	RME_CommonWin32.EXE
RME_Documentation.zip	RME_Documentation.EXE
RME_eClient.zip	RME_eClient.EXE
RME_IRMClient.zip	RME_IRMClient.EXE
RME_Notes.zip	RME_Notes.EXE

In addition, we have included the following new installation components for the installation of RME support for eClient server on AIX and SUN Solaris system platforms:

RME_CommonJavaAIX
RME_eClientAIX

RME_CommonJavaSUN
RME_eClientSUN

See Section 3.2 in this readme for installation instructions for these new files.

3.1 Understanding the installation requirements

This section is an updated version of the "Understanding the installation requirement" section on page 12 of the *Installing and Configuring Records Manager Enabler* document. The only thing we have changed is to replace RME_XXXXXX.zip with RME_XXXXXX.EXE. Other installation requirements are NOT changed.

This section lists the software requirements and RME installation files required to support RME functions for each of the RME components.

RME component	Installation requirements
Records Manager server	Content Manager V8 Connector V8.2 with Fix Pack 3 RME_CommonJava.EXE RME_CommonWin32.EXE RME_IRMClient.EXE
CM eClient server for Windows	RME_CommonJava.EXE RME_eClient.EXE
CM eClient server for AIX	RME_CommonJavaAIX RME_eClientAIX
CM eClient server for SUN	RME_CommonJavaSUN RME_eClientSUN
CM Client for Windows V8.2	Microsoft Simple Object Access Protocol (SOAP) Toolkit V3.0 Microsoft MSXML Parser V4.0 RME_CommonWin32.EXE
Lotus Notes client	IBM DB2 Run-Time Client Version 8.1 with Fix Pack 3 Content Manager V8 Connector V8.2 with Fix Pack 3 Microsoft Simple Object Access Protocol (SOAP) Toolkit V3.0 Microsoft MSXML Parser V4.0 RME_CommonWin32.EXE RME_Notes.EXE
Microsoft Outlook client	IBM DB2 Run-Time Client Version 8.1 with Fix Pack 3 Content Manager V8 Connector V8.2 with Fix Pack 3 Microsoft Simple Object Access Protocol (SOAP) Toolkit V3.0 Microsoft MSXML Parser Version 4.0 RME_CommonWin32.EXE

For other sections in the "Installing and Configuring Records Manager Enabler" publication, please replace RME_XXXXXX.zip with RME_XXXXXX.EXE.

3.2 New instructions for AIX and SUN eClient server installation

We have included the following new installation components for the installation of RME support for eClient server on AIX and SUN Solaris system platforms:

RME_CommonJavaAIX
RME_eClientAIX

RME_CommonJavaSUN
RME_eClientSUN

To install the RME support for eClient server on either AIX or SUN Solaris system platforms, do the following:

For AIX:

- Copy the RME_CommonJavaAIX file to the RME installed directory (For example: /usr/lpp/icm/RME)
- Execute RME_CommonJavaAIX
- Copy the RME_eClientAIX file to the eclient82.war directory where the eClient server is installed. For example, copy RME_eClientAIX to:

/opt/IBM/CMeClient/installedApp/IBM_eClient_82.ear/eclient82.war

- Execute RME_eClientAIX

For SUN:

- Copy the RME_CommonJavaSUN file to the RME installed directory (For example: /opt/IBMmicm/RME)
- Execute RME_CommonJavaSUN
- Copy the RME_eClientSUN file to the eclient82.war directory where the eClient server is installed. For example, copy RME_eClientSUN to:
/opt/IBM/CMeClient/installedApp/IBM_eClient_82.ear/eclient82.war
- Execute RME_eClientSUN

After you have copied and executed the above files, continue with the eClient server installation instructions in the *Installing and Configuring Records Manager Enabler* publication.

Follow the instructions in the following sections:

- Configuration eClient server to include RME support (page 24)
- Adding RME servlets to the eClient server (page 24)

3.3 Using RMECMSSetup tool to set up the CM server

If your CM server is on either the AIX or SUN Solaris system platform, you need to run the RMECMSSetup tool and the RMECMSamplesSetup tool on the Record Manager server machine to set up the CM server. These tools can ONLY be executed on Windows system platforms.

See the following sections in the *Installing and Configuring the Records Manager Enabler* publication for details on how to execute these tools:

- Using RMECMSSetup tool to set up the CM server (page 43)
- Creating RME-enabled item types (page 43)

4 PTF requirements for Content Manager z/OS (CM/390) V8.2

Although it is not described in the RME installation guide, RME supports Content Manager server V8.2 on OS/390 system platform.

Refer to the *Planning and Installing Content Manager for z/OS* document for installation requirements for CM/390.

The planning guide is available at web site:

<http://www-3.ibm.com/software/data/cm/cmgr/390/library.html>

To support RME V8.2 on the CM/390 server, the following DB2 PTF must be installed on the CM server machine:

- PTF UQ72083 for DB2 V7

5 Using the RMEMonitor to process the RME ACL queue

Whenever the RMECMRemoteHost WebSphere Web application or the IRM server is restarted, you must use the RMEMonitor to restart the processing of the RME ACL queue for each of the CM Host Applications that is defined on the IRM system. The RMEMonitor is used to synchronize user permissions between IRM and CM.

To start the RME ACL queue, point your Web browser to URL:

[http://\[servername\]:9080/RMEMonitor](http://[servername]:9080/RMEMonitor)

where *[servername]* is the name of your IRM server.

The RMEMonitor log-in Web page is displayed. Enter the CM database name, user name (rmeadmin, for example), and the password, and click Submit to log in.

The next page displays your log-in information and provides a drop-down list with the following options:

- | | |
|------------------------------------|--|
| Log out | Logs you out of the RMEMonitor utility. |
| List all items in the queue | Displays a list of the ACL change requests that are submitted to this CM system. ACL change requests are placed in the queue whenever user permissions are added or changed on this CM system. |

- | | |
|---|--|
| Remove the first item from the queue | Select this option to remove the first item in the queue to continue processing the next item in the queue. |
| Process all items in the queue | Select this option to process all items in the queue to ensure all ACL change requests have been processed. The queue will be empty after selecting this option. |

Select "List all items in the queue" from the drop-down list. This generates a list of the ACL change requests that are submitted to this CM system. Click Submit.

The next page displays the items that are currently in the RME ACL queue. The number of items in the queue is also displayed, along with your log-in information.

Select "Process all items in the queue" from the drop-down list and click Submit. This starts the processing of the RME ACL queue.

Repeat the same steps for other CM Host Applications (if applicable) that are defined on the IRM system to restart their RME ACL queues.

6 RME file plan filtering for classification

The DOD 5015.2 standard requires that Records Management Application be able to show only the portion of the file plan in which the user has enough privileges to classify the new record during record declaration. That is, when you click the Browse button next to the Classification input field on the RME - Record Profile screen to show a list of file plan classifications that you are authorized to classify. Those classifications of which you do not have authorization to classify under are not displayed.

All RME client applications support the file plan filtering as a configurable option. When this "filtering" option is turned on, the classification selection screen will only show the portion of the file plan in which the user can classify the new record. When the "filtering" option is turned off, the classification selection screen will show the portion of the file plan that the user can view. To control the option, follow the following instructions for different clients.

For RME-enabled CM eClient:

To turn on the filtering option, set the key "IS_FILTERED" to "true" in the RME environment properties file (rmeenv.properties) under the RME install lib directory, for example, C:\program files\IBM\CM82\RME\lib\rmeenv.properties, on the eClient server.

To turn off the filtering option, set the key "IS_FILTERED" to "false" in the RME environment properties file (rmeenv.properties) under the RME install lib directory, on the eClient server.

For RME-enabled CM Windows Client, Lotus Notes Client, and Microsoft Outlook Client:

To turn on the filtering option, define a system environment variable "RMEFILTER" and set its

value to "1" on the client machine. To turn off the filtering option, delete the system environment variable "RMEFILTER", if any, on the client machine.

7 IBM DB2 Content Manager V8.2 Client for Windows support

IBM DB2 Content Manager V8.2 Client for Windows is available in two editions: Standard and Multi-Server. RME only supports the Standard edition.

The Installing and Configuring the Records Manager Enabler publication references the RME_Client821.zip file, which is used to install the Content Manager V8.2 Client for Windows Multi-Server support. References to this file should be ignored. The file no longer exists.

8 Versioning

Currently IBM only supports RME-enabling Content Manager item types that have a versioning policy of "Never create" for both the item and any of its associated parts. In other words, any item type that has been enabled for records should not have any type of versioning enabled. This limitation will be addressed in a future version of the RME.

9 Declaring folders

In the current version of RME, declaring a folder as a record is not supported. This limitation will be addressed in a future version of the RME.

10 Known problems

10.1 Records Manager "Reset Descendants" function problem

For the current RME release, the **Security** → **System Permissions** → **Reset Descendants** function on the Records Manager client is NOT supported.

If you select **Reset Descendants** on the **Security** → **System Permissions** screen, you will get an error message from the RME system.

The work-around is to use the **Reset Descendants** function at the **File Plan Administration** → **Actions** → **Permissions** function screen.

10.2 Configuration key added for host delete error

The configuration key CM_DELETE_FAIL_NOTIFY=0|1 has been made available for a work-around to a known host-delete exception that occurs if there are inconsistencies between IRM and CM. The exception occurs when an administrator deletes an item that has been declared a

record from CM (the user would require to have a super user ID to do this.) This situation can also arise if an administrator performs a database restore of either IRM or CM. Performing an operation on a record that has been affected (for example, deleted) via the IRM Records Administration Console will cause the exception to surface. The new configuration key allows administrators a way to delete all affected records.

The configuration key must be specified in the file `rmeenv.properties` located in the RME installation directory (for example, `c:\Program Files\IBM\CM82\RME\lib`). If the configuration key is set to "0" (`CM_DELETE_FAIL_NOTIFY=0`) and the delete error condition is encountered, the host exception will not surface. This is the default. Otherwise, set this key to "1" (`CM_DELETE_FAIL_NOTIFY=1`) to indicate that if the exception is thrown the current operation is deleted.

11 Notices

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