

Oracle® Fusion Middleware

Upgrade Guide for Oracle Enterprise Content Management
Suite

11g Release 1 (11.1.1)

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Oracle Fusion Middleware Upgrade Guide for Oracle Enterprise Content Management Suite, 11g Release 1 (11.1.1)

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Preface

This preface contains the following sections:

- [Audience](#)
- [Documentation Accessibility](#)
- [Related Documents](#)
- [Conventions](#)

Audience

This manual is intended for Oracle Fusion Middleware system administrators who are responsible for installing and upgrading Oracle Fusion Middleware. It is assumed that the readers of this manual have knowledge of the configuration and expected behavior of the system being upgraded.

Documentation Accessibility

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Related Documents

For more information, see the following related documentation available in the Oracle Fusion Middleware 11g documentation library:

- Related Upgrade Documentation
 - *Oracle Fusion Middleware Upgrade Planning Guide*
 - *Oracle Fusion Middleware Upgrade Guide for Java EE*
 - *Oracle Fusion Middleware Upgrade Guide for Oracle SOA Suite, WebCenter, and ADF*
 - *Oracle Fusion Middleware Upgrade Guide for Oracle Identity Management*
- *Oracle Fusion Middleware Installation Planning Guide*
- *Oracle Fusion Middleware Installation Guide for Oracle Portal, Forms, Reports and Discoverer*
- *Oracle Fusion Middleware Administrator's Guide*

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.
<i>italic</i>	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.

Summary of the Oracle Enterprise Content Management Suite Upgrade Process

This chapter provides a high-level summary of the steps required to upgrade Oracle Enterprise Content Management Suite components from Oracle Enterprise Content Management 10g to Oracle Enterprise Content Management Suite 11g.

This chapter contains the following sections:

- [Flow Chart of the Oracle Enterprise Content Management Suite Upgrade Process](#)
- [Table Describing the Steps in the Oracle Enterprise Content Management Suite Upgrade Process](#)

1.1 Flow Chart of the Oracle Enterprise Content Management Suite Upgrade Process

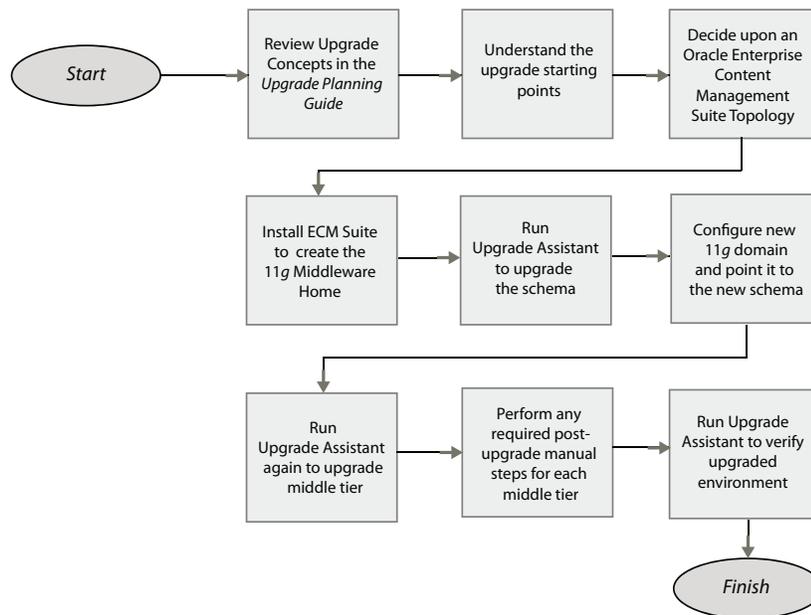
[Figure 1–1](#) provides a flow chart of the Oracle Enterprise Content Management Suite upgrade process. Review this chart to get familiar with the steps you will be required to take, based on your existing Oracle Fusion Middleware environment.

Note: This guide documents only Oracle UCM and Oracle URM upgrades using Upgrade Assistant. For the latest information on upgrading Oracle IRM and Oracle I/PM, contact Oracle Support.

Oracle Enterprise Content Management Suite Components

Whether you are upgrading Oracle Universal Content Management or Oracle Universal Records Management, the upgrade process is the same. However, you must upgrade the Oracle Enterprise Content Management Suite component schemas before you upgrading the middle tiers.

Figure 1–1 Flow Chart of the Oracle Enterprise Content Management Suite Upgrade Process



1.2 Table Describing the Steps in the Oracle Enterprise Content Management Suite Upgrade Process

Table 1–1 describes each of the steps in the upgrade process flow chart, which is shown in Figure 1–1. The table also provides information on where to get more information on each step in the process.

Table 1–1 Table Describing the Steps in the Oracle Enterprise Content Management Suite Upgrade Process

Step	Description	More Information
Review Upgrade Concepts in the Oracle Fusion Middleware Upgrade Planning Guide	The <i>Oracle Fusion Middleware Upgrade Planning Guide</i> provides a high-level overview of how to upgrade your entire Oracle Application Server environment to Oracle Fusion Middleware, including compatibility information and instructions for upgrading any databases that support your middleware components.	<i>Oracle Fusion Middleware Upgrade Planning Guide</i>
Understand the upgrade starting points	Before planning your upgrade, you should be familiar with the supported starting points for an Oracle Enterprise Content Management Suite upgrade.	Task 1: Understand the Starting Points for Oracle Enterprise Content Management Suite Upgrade
Decide upon an Oracle Enterprise Content Management Suite Topology	Before you begin an upgrade, make sure you are familiar with the basic topologies in Oracle Fusion Middleware 11g.	Task 2: Decide Upon an Oracle Enterprise Content Management Suite Topology

Table 1–1 (Cont.) Table Describing the Steps in the Oracle Enterprise Content Management Suite Upgrade Process

Step	Description	More Information
Install Oracle Enterprise Content Management Suite to create the 11g Middleware Home	Install WebLogic Server to create the Middleware home, and then install Oracle Enterprise Content Management 11g.	Task 3: Install Enterprise Content Management Suite
Run Upgrade Assistant to upgrade the schema	Upgrade the database schemas in-place for either Oracle Universal Content Management or Oracle Universal Records Management.	Task 4: Run the Upgrade Assistant to Upgrade the Oracle Enterprise Content Management Suite Schema
Configure the New 11g domain and point it to the new schema	Use the Oracle Enterprise Content Management Suite configuration Wizard to configure your new Oracle Fusion Middleware middle tiers.	Task 5: Configure the Enterprise Content Management Suite Domain
Run the Upgrade Assistant Again to Upgrade the middle tiers	The Oracle Fusion Middleware Upgrade Assistant copies configuration data from your existing Oracle Enterprise Content Management Suite middle tiers to the newly installed Oracle Universal Content Management or Oracle Universal Records Management middle tiers.	Task 6: Use the Upgrade Assistant to Upgrade the Oracle Enterprise Content Management Suite Middle Tier
Perform Any Required Post-Upgrade Manual Steps for Each middle tier	The Upgrade Assistant automates many of the upgrade tasks, but there are cases where you must manually modify the configuration settings after running the Upgrade Assistant.	Task 7: Perform Any Required Post-Upgrade Configuration Tasks
Run Upgrade Assistant to Verify the Upgraded Environment	The Upgrade Assistant provides a feature that verify the upgraded environment to make sure specific components and URLs are functional.	Task 8: Verify the Oracle Enterprise Content Management Suite Upgrade

Supported Starting Points for Oracle Enterprise Content Management Suite

Refer to the following sections for information about the supported starting points for upgrading to Oracle Enterprise Content Management Suite 11g:

- [Oracle Universal Content Management Supported Starting Points](#)
- [Oracle Universal Records Management Supported Starting Points](#)
- [Upgrading Oracle Imaging and Process Management](#)
- [Upgrading Oracle Information Rights Management](#)

Note: If you are running components of the Oracle Enterprise Content Management Suite (Oracle ECM) 11g Release 1 (11.1.1.2.0), then refer to the Oracle Fusion Middleware Patching Guide for more information.

This guide provides instructions for upgrading from Oracle Enterprise Content Manager 10g to the latest Oracle Enterprise Content Management Suite.

2.1 Oracle Universal Content Management Supported Starting Points

This guide documents the procedure for upgrading from Oracle UCM 10g Release 3 (10.1.3) to Oracle UCM 11g.

If you are currently running Oracle Fusion Middleware 11g, refer to the *Oracle Fusion Middleware Patching Guide*, which provides information about applying the latest Oracle Fusion Middleware patches.

Note: You should run an Oracle URM upgrade only when upgrading a full 10g Oracle URM system. If you are upgrading a 10g RM Corporate System or a 10g Content Server Adapter system, run the Oracle UCM upgrade, NOT the Oracle URM upgrade.

2.2 Oracle Universal Records Management Supported Starting Points

This guide documents the procedure for upgrading from Oracle URM 10g Release 3 (10.1.3) to Oracle URM 11g.

If you are currently running Oracle Fusion Middleware 11g, refer to the *Oracle Fusion Middleware Patching Guide*, which provides information about applying the latest Oracle Fusion Middleware patches.

Note: You should run an Oracle URM upgrade only when upgrading a full 10g Oracle URM system. If you are upgrading a 10g RM Corporate System or a 10g Content Server Adapter system, run the Oracle UCM upgrade, NOT the Oracle URM upgrade.

2.3 Upgrading Oracle Imaging and Process Management

Upgrade Assistant does not support upgrading from Oracle I/PM 10g to Oracle Enterprise Content Management Suite 11g.

For the latest information about upgrading Oracle I/PM 10g to Oracle I/PM 11g, contact Oracle Support.

For information about installing and configuring Oracle I/PM 11g, see *Oracle Fusion Middleware Administrator's Guide for Imaging and Process Management*.

2.4 Upgrading Oracle Information Rights Management

Upgrade Assistant does not support upgrading from Oracle IRM 10g to Oracle Enterprise Content Management Suite 11g.

For the latest information about upgrading Oracle IRM 10g to Oracle IRM 11g, contact Oracle Support.

For information about installing and configuring Oracle IRM 11g, see *Oracle Fusion Middleware Administrator's Guide for Oracle Information Rights Management Server*.

Oracle Enterprise Content Management Suite for 10g Users

The following sections introduce some key concepts of the Oracle Enterprise Content Management Suite 11g environment for Oracle Enterprise Content Management Suite 10g users:

- [Oracle Enterprise Content Management Suite \(ECM\) Components](#)
- [Oracle Enterprise Content Management Suite and Oracle WebLogic Server](#)
- [Directory Structure for Oracle Enterprise Content Management Suite](#)
- [Changes to Oracle UCM and Oracle URM](#)
- [Changes to Oracle I/PM](#)
- [Changes to Oracle URM](#)
- [Changes to Oracle IRM](#)

3.1 Oracle Enterprise Content Management Suite (ECM) Components

Oracle Enterprise Content Management (ECM) Suite, an Oracle Fusion Middleware component, is an integrated suite of products designed for managing content. It is the industry's most unified enterprise content management platform that enables you to leverage industry-leading document management, Web content management, digital asset management, and records management functionality to build your business applications. Building a strategic enterprise content management infrastructure for content and applications helps you to reduce costs, easily share content across the enterprise, minimize risk, automate expensive, time-intensive and manual processes, and consolidate multiple Web sites onto a single platform.

Oracle ECM Suite comprises a number of different components including:

- [Oracle Universal Content Management \(Oracle UCM\)](#)
- [Oracle Universal Records Management \(Oracle URM\)](#)
- [Oracle Information Rights Management \(Oracle IRM\)](#)
- [Oracle Imaging and Processing Management \(Oracle I/PM\)](#)

For information about all Oracle Enterprise Content Management Suite components, see the *Oracle Fusion Middleware Overview Guide for Oracle Enterprise Content Management*.

3.2 Oracle Enterprise Content Management Suite and Oracle WebLogic Server

The most significant difference between Oracle Enterprise Content Manager 10g and Oracle Enterprise Content Management Suite 11g, is the deployment to Oracle WebLogic Server, and the integration of Oracle Enterprise Content Management Suite components with Oracle Fusion Middleware applications, such as Oracle SOA Suite and Oracle Business Process Management.

For more information about Oracle Fusion Middleware Components, see Chapter 1, "Introduction to Oracle Fusion Middleware" in the *Oracle Fusion Middleware Administrator's Guide*.

Oracle WebLogic Server Middleware Home

Oracle Enterprise Content Management Suite requires a Middleware home with Oracle WebLogic Server on your system. If your system does not already have Oracle WebLogic Server, you can install it in a new Middleware home directory.

A Middleware home is a container for the Oracle WebLogic Server home, and, optionally, one Oracle Common home and one or more Oracle homes, with a directory structure like this:

```
/middleware_home
  wls_server_10.3
  jdk160
  oracle_common
  ECM_ORACLE_HOME
  user_projects
```

The ECM Oracle home contains the binary and library files necessary for Oracle Enterprise Content Management Suite. *ECM_ORACLE_HOME* represents the ECM Oracle home in path names.

The ECM Oracle home can be associated with multiple Oracle WebLogic Server domains. The Oracle Common home contains the binary and library files required for Oracle Enterprise Manager 11g Fusion Middleware Control and Java Required Files (JRF).

A Middleware home can reside on a local file system or on a remote shared disk that is accessible through a network file system (NFS).

For more information about the structure and contents of a Middleware home, see "Understanding Oracle Fusion Middleware Concepts" in *Oracle Fusion Middleware Administrator's Guide*.

3.3 Directory Structure for Oracle Enterprise Content Management Suite

[Figure 3-1](#) shows the default directory structure of an Oracle Enterprise Content Management Suite installation.

When you install Oracle WebLogic Server, the installer creates a Middleware home directory (*MW_HOME*) that contains the Oracle WebLogic Server home directory (*WL_HOME*) and an Oracle Common home directory (*ORACLE_COMMON_HOME*), which contains the binary and library files required for the Oracle Enterprise Manager Fusion Middleware Control and Java Required Files (JRF).

When you install Oracle Enterprise Content Management Suite, an ECM Oracle home directory for the suite (*ECM_ORACLE_HOME*) is created under the Middleware home

directory. The ECM Oracle home directory contains the binary and library files for Oracle Enterprise Content Management Suite.

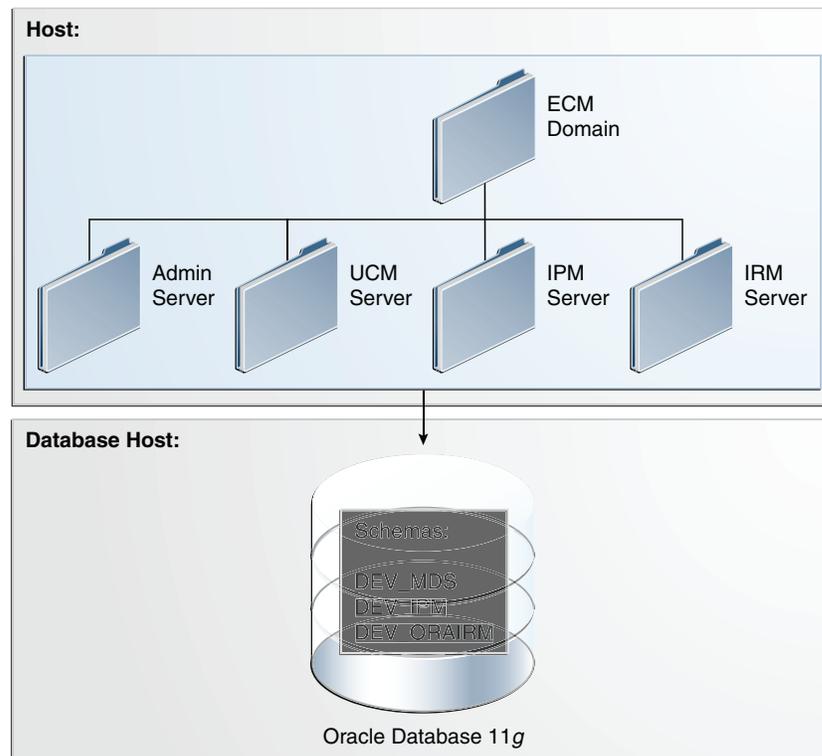
When you configure Oracle Enterprise Content Management Suite to create an Oracle WebLogic Server domain, a domain directory is created by default under the `MW_HOME/user_projects/domain` directory. The directory for the domain where you configure Oracle Enterprise Content Management Suite contains the Administration Server and one or more Managed Servers, each hosting an Oracle Enterprise Content Management Suite application. Based on the application or applications that you install, the following Managed Servers are created:

- Oracle I/PM Managed Server
- Oracle IRM Managed Server
- Oracle UCM Managed Server
- Oracle URM Managed Server

Figure 3–1 illustrates the directory structure that installation and configuration of these products creates on your system.

Note: As previously indicated, by default, the domain directory is created within the User Projects directory. However, domain directories do not have to be based within the User Project directory. In fact, it is a best practice to ensure that the domain directories are outside of the installation directory.

Figure 3–1 Directory Structure of an Oracle Enterprise Content Management Suite Installation



This graphic shows the directory structure of an Oracle Enterprise Content Management Suite installation with Oracle UCM, Oracle I/PM, and Oracle IRM Managed Servers. The Oracle URM application is deployed to the Oracle UCM Managed Server.

The topology in [Figure 3-1](#) includes multiple applications configured on the same host in one Oracle WebLogic Server domain that includes only Oracle Enterprise Content Management Suite applications. The schemas for the applications are in the same database.

3.4 Changes to Oracle UCM and Oracle URM

This section summarizes changes to Oracle UCM and Oracle URM for Oracle Fusion Middleware 11g.

- [Architectural Changes](#)
- [New Features for Oracle UCM 11g Release 1 \(11.1.1\)](#)
- [Changed Features for Oracle UCM Release 11g \(11.1.1\)](#)
- [Changes to Oracle URM](#)

3.4.1 Architectural Changes

[Figure 3-2](#) shows the basic architecture of Oracle UCM 10g. The Oracle URM structure is the same.

Figure 3–2 Comparing the Oracle Enterprise Content Management Suite Topology in 10g Release 2 (10.1.2) and Oracle Fusion Middleware 11g

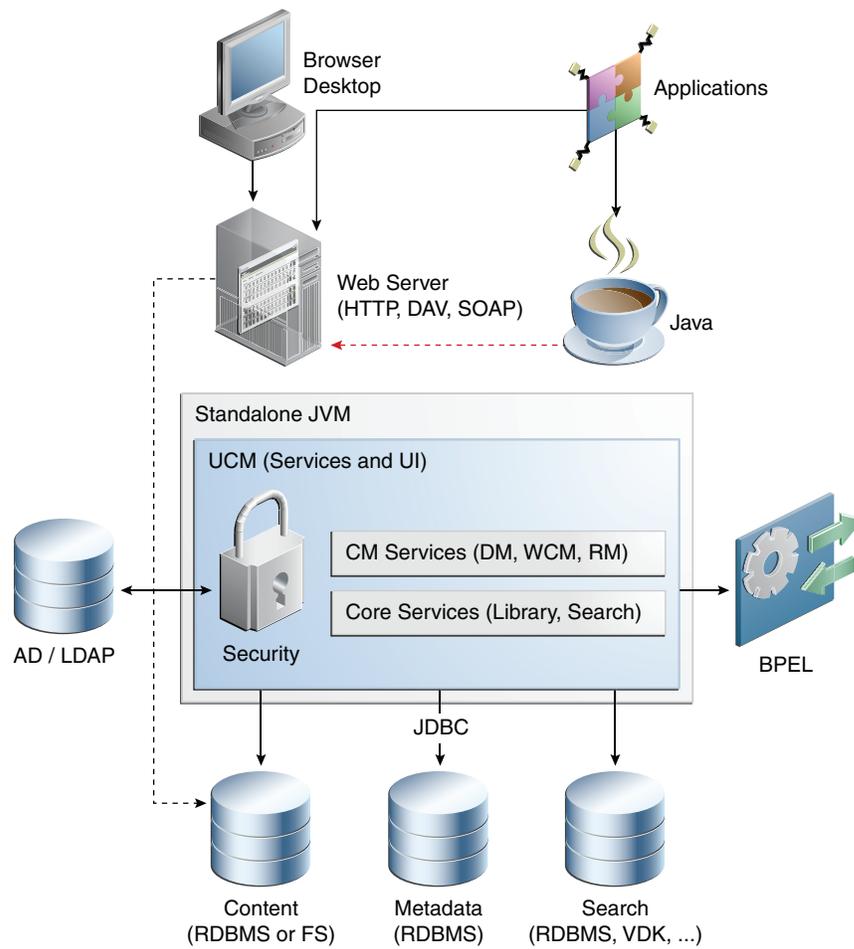
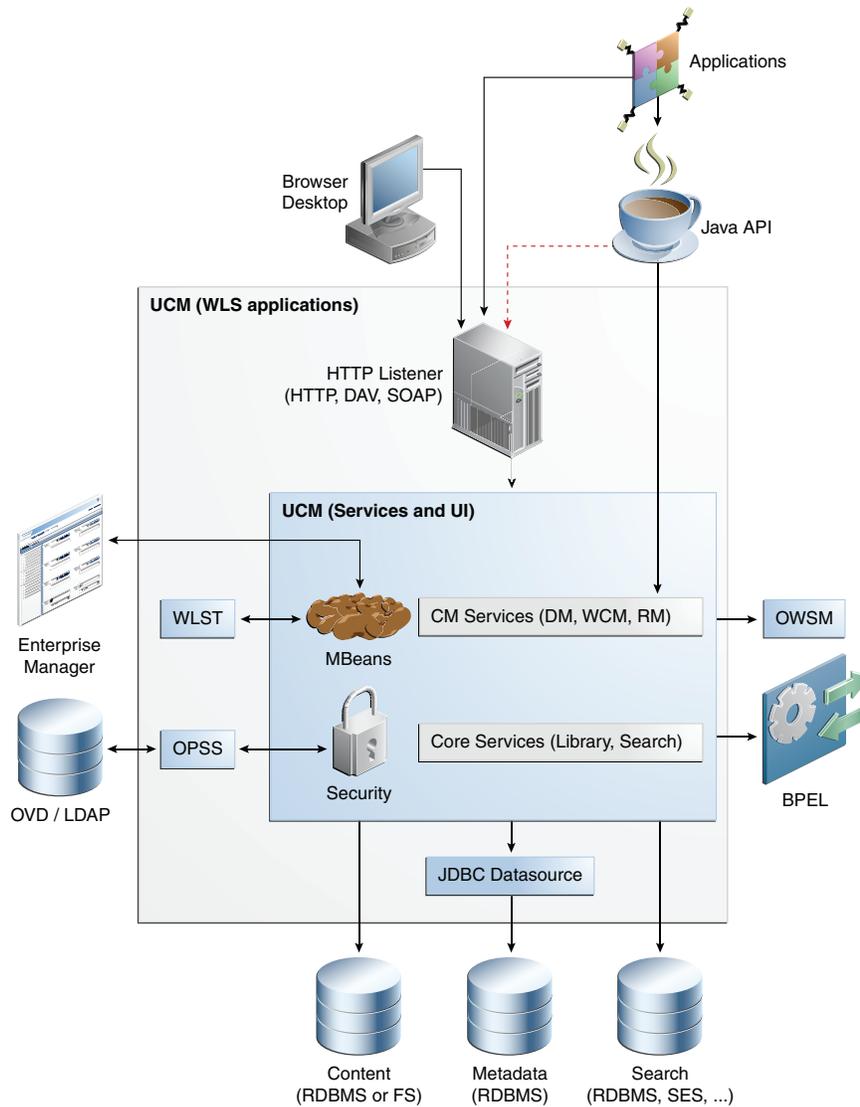


Figure 3–3 shows the basic architecture of Oracle UCM 11g. The Oracle URM 11g architecture is the same.

Figure 3–3 The Oracle UCM Architecture for Oracle Fusion Middleware 11g

3.4.2 New Features for Oracle UCM 11g Release 1 (11.1.1)

Oracle UCM 11g Release 1 (11.1.1) includes the following new features in this guide:

- **Web services:** Oracle UCM uses Oracle WebLogic Server Web Services.
- **ComponentTool:** The ComponentTool utility has been added to provide a command-line tool for installing, enabling, and disabling components.
- **Content Server deployment:** Content Server is deployed on an Oracle WebLogic Server in the Oracle Enterprise Content Management Suite, which means changes in configuring and administering Oracle UCM. For more information, see *Oracle Fusion Middleware System Administrator's Guide for Content Server*.

3.4.3 Changed Features for Oracle UCM Release 11g (11.1.1)

Oracle UCM 11g Release 1 (11.1.1) includes the following changes:

- **Directory Structure:** The directory structure of an installed Oracle UCM instance has changed. Unlike in Release 10gR3, runtime files, configuration files, and files

that must be shared between clustered Content Server instances, server configuration files, and file store may be in various locations. The following locations and terms are important to understanding an Oracle UCM Release 11gR1 (11.1.1) installation:

- *IdcHomeDir*: The variable used to refer to the directory in *ECM_ORACLE_HOME* where the Oracle UCM (ucm) server media is located. The server media can run Content Server, Inbound Refinery, or Universal Records Management.
- *DomainHome*: The variable used to refer to the user-specified directory where an Oracle UCM server is deployed to run on an Oracle WebLogic Server application server. The *DomainHome/ucm/short-product-id/bin* directory contains the *intradoc.cfg* file and executables.
- *short-product-id*: The variable used to refer to the type of Oracle UCM server deployed on an Oracle WebLogic Server. Possible values include:
 - * cs (Content Server)
 - * ibr (Inbound Refinery)
 - * urm (Universal Records Management)
- *IntradocDir*: The variable used to refer to the root directory for configuration and data files specific to a Content Server instance deployed on an Oracle UCM domain on an Oracle WebLogic Server. This variable is configured for one type of Content Server instance: Content Server, or Inbound Refinery, or Universal Records Management. This directory can be located elsewhere, but the default location is *DomainHome/ucm/short-product-id*.
- **SOAP**: SOAP is provided with Oracle WebLogic Server, not in Oracle UCM.
- **WSDL Generator**: The WSDL Generator is not supported.
- **Web Form Editor**: The Web Form Editor user interface and FCKEditor are not supported.

3.4.4 Changes to Oracle URM

Previous versions of Oracle UCM 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 will vary depending on the options chosen at installation:

- 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.
- **Setting up** the software now consists of three main steps:
 - Initial choices: this should be done immediately after installation. Depending on the choices made, specific components will be enabled for use.
 - Initial configuration of global settings: this includes setting configuration variables, configuring the time periods used in the software, setting up triggers, and other global settings used for retention management.
 - Configuring the retention elements of the software: this includes setting options to use custom security fields, to use classification guides, and to choose how revisions, deletions, and edits to content are handled.
- **Physical Content Management** documentation is incorporated into this documentation at this release. Separate documentation no longer exists for Physical Content Management.
- **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 drop-down menu indicates that other pages of information are available for viewing.
- A **print** option is now available on every screen.
- When using Physical Content Management **offsite storage** of content can be configured.
- **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 the 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*.
- A new interface is provided to manage **reports**. Templates can be created for reports and can be checked in to the repository in the same way other content can be checked in.
- **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.
- 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.
- When creating **disposition rules** involving moves (such as Archive, Accession, Transfer, and Move), a location can be specified. If a location is chosen, content is copied to the specified location as part of the disposition step. In previous releases, a zip file of the copied content was created; the content was not copied to a location.
- Disposition rules can now be reviewed in a **workflow** before implementation.

- 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.
- **Performance monitoring** can now be done through the Oracle URM interface. Performance statistics for batches, items, and processes can be tracked.
- **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.
- **Categories and disposition rules** can be copied from existing categories to a new category, making retention schedule creation easier and less prone to error.
- **Related content links** for items can be created as needed on the content checkin page.

3.5 Changes to Oracle I/PM

This section describes the most significant changes between Oracle I/PM 10g and I/PM 11g

This section contains the following topics:

- [Integration with Oracle Document Capture](#)
- [Integration with an Oracle Document Repository](#)
- [Integration with Oracle WebLogic Server](#)
- [Integration with Oracle Workflow Server](#)

3.5.1 Integration with Oracle Document Capture

Oracle I/PM integrates with Oracle Document Capture and Oracle Distributed Document Capture to allow you to convert physical documents into an electronic format to be uploaded to Oracle I/PM. Ensure that Oracle Document Capture has been configured with the Oracle I/PM 11g commit driver. Talk to the Oracle Document Capture administrator or see the administration documentation for Oracle Document Capture or Oracle Distributed Document Capture.

3.5.2 Integration with an Oracle Document Repository

Oracle I/PM leverages Oracle Content Server as a repository for document storage and retrieval. Oracle Content Server supports both out-of-the-box content management services and open, customizable integration options that can manage a broad range of enterprise content such as emails, documents, and images from different content sources. Content Server supports Oracle, SQL Server, and DB2 databases to allow indexing and storage of content in a variety of ways. Depending on the database and configuration, documents and metadata can be stored within the database, on a file system, or a combination of both. Flexible search options allow you to configure the repository to support either metadata searching or full-text searching per I/PM application to provide the most applicable search capabilities.

3.5.3 Integration with Oracle WebLogic Server

Oracle I/PM is designed to leverage many of the features of Oracle WebLogic Server including its standard Java EE architecture, integrations with Oracle security components, scalability including clustering, system management tools like Enterprise Manager, WebLogic Scripting Tools, and WebLogic Server Console.

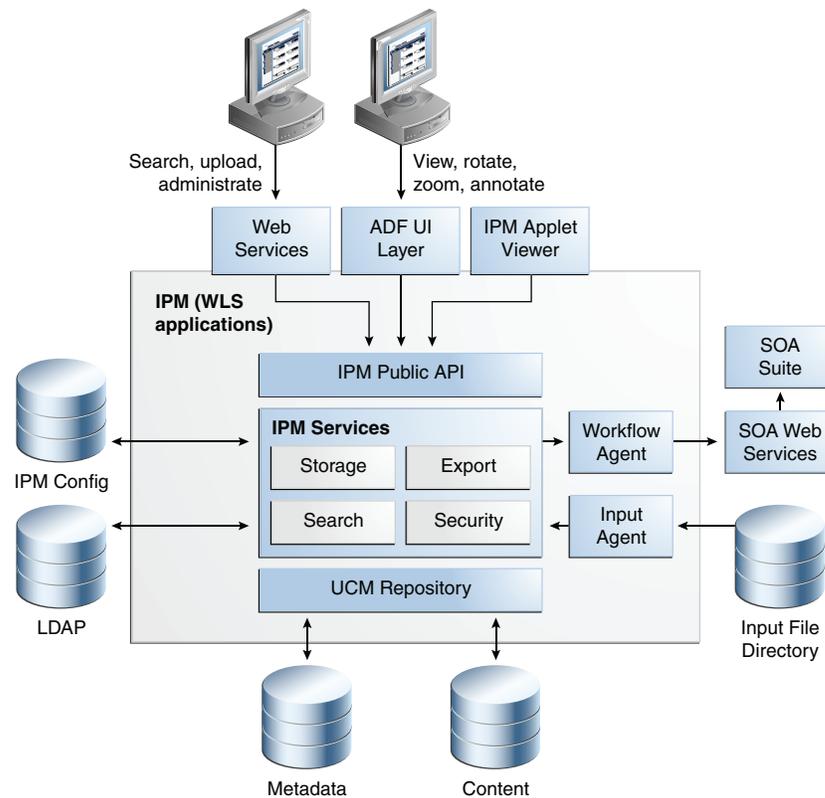
3.5.3.1 Working Within a Clustered Environment

For production environments that require increased application performance, throughput, or high availability, you can configure two or more Managed Servers to operate as a cluster. A cluster is a collection of multiple Oracle WebLogic Server instances running simultaneously and working together to provide increased scalability and reliability. In a cluster, most resources and services are deployed identically to each Managed Server (as opposed to a single Managed Server), enabling failover and load balancing. A single domain can contain multiple Oracle WebLogic Server clusters, as well as multiple Managed Servers that are not configured as clusters. The key difference between clustered and non-clustered Managed Servers is support for failover and load balancing. These features are available only in a cluster of Managed Servers. For more information on configuring a clusters in WebLogic Server, see the guide *Oracle Fusion Middleware Using Clusters for Oracle WebLogic Server*.

3.5.4 Integration with Oracle Workflow Server

A connection to a workflow server is used to initiate a workflow process when documents are uploaded to Oracle I/PM, allowing for business process integration across the enterprise.

[Figure 3–4](#) illustrates the Oracle I/PM process overview.

Figure 3–4 Oracle I/PM Process Overview

3.6 Changes to Oracle IRM

This section describes the differences between Oracle Information Rights Management (Oracle IRM) 10g and Oracle IRM 11g. You can use this information to plan your strategy for upgrading to Oracle IRM 11g

Oracle IRM Management Tools

In Oracle IRM 10g, the Oracle IRM management console is a standalone administrative tool, used to manage the following:

- Server settings
- Users, Groups and Authentication
- Server administrative roles and rights
- Contexts, Roles, Rights and Administration
- Auditing and Reporting

The Oracle IRM 10g console must be installed on a Windows computer.

In Oracle IRM 11g, the IRM Server Management Console is a browser-based, graphical user interface that you use to manage Oracle IRM Server.

Oracle IRM Desktop

The Oracle IRM 11g Desktop is backward compatible with previous Oracle IRM Servers. Some of the new functionality described below may be dependant on having an 11g Server. The following list describes some of the new Oracle IRM Desktop features:

- **New communications protocol** - Web Services over HTTPS. Oracle IRM still uses SEAL protocol for compatibility with Oracle IRM 10g servers
- **Security** - New crypto algorithms
- **Single Sign-On authentication** - Oracle Access Manager, Kerberos, Basic authentication to LDAP
- **Internationalization** - Support for 27 languages
- **Extensibility** - Uses "Content Attributes" for File Properties, tooltips and Watermarking. Supports any classification system.
- **Synchronization** - Shared memory license management, and message alerts.
- **Desktop Options** - A new **Update Rights** tab contains buttons to perform synchronize and check in operations.
- **Start Menu Entry** - The new Oracle IRM Desktop has its own Start menu entry.
- **User Interface** - The new user interface has been updated to use Windows XP themes. In addition, the Unsealer Control Panel pages have a new look and feel, using HTML to render the information.
- **Update Rights Page Access** - The Office Unsealer and Browser Unsealer now contain **Update Rights** buttons launches the Update Rights page on the Desktop Options

Oracle IRM Server

The 11g Oracle IRM Server is a Java-based application, and is part of Oracle Fusion Middleware, running on Oracle WebLogic Server. The following list describes some additional changes to Oracle IRM Server:

- New Web-based management application in Oracle ADF
- Support for: Oracle Virtual Directory, Oracle Internet Directory, and Oracle Access Manager
- Extensible classification and rights model for applications integration
- Used by Oracle Beehive 2.0
- FIPS 140-2 certified crypto
- HSM (Hardware Security Module for key storage)

3.6.1 Architecture Changes to Oracle IRM

[Figure 3-5](#) illustrates the Oracle IRM 10g server running on Windows:

Figure 3–5 Oracle IRM 10g Server running in Windows

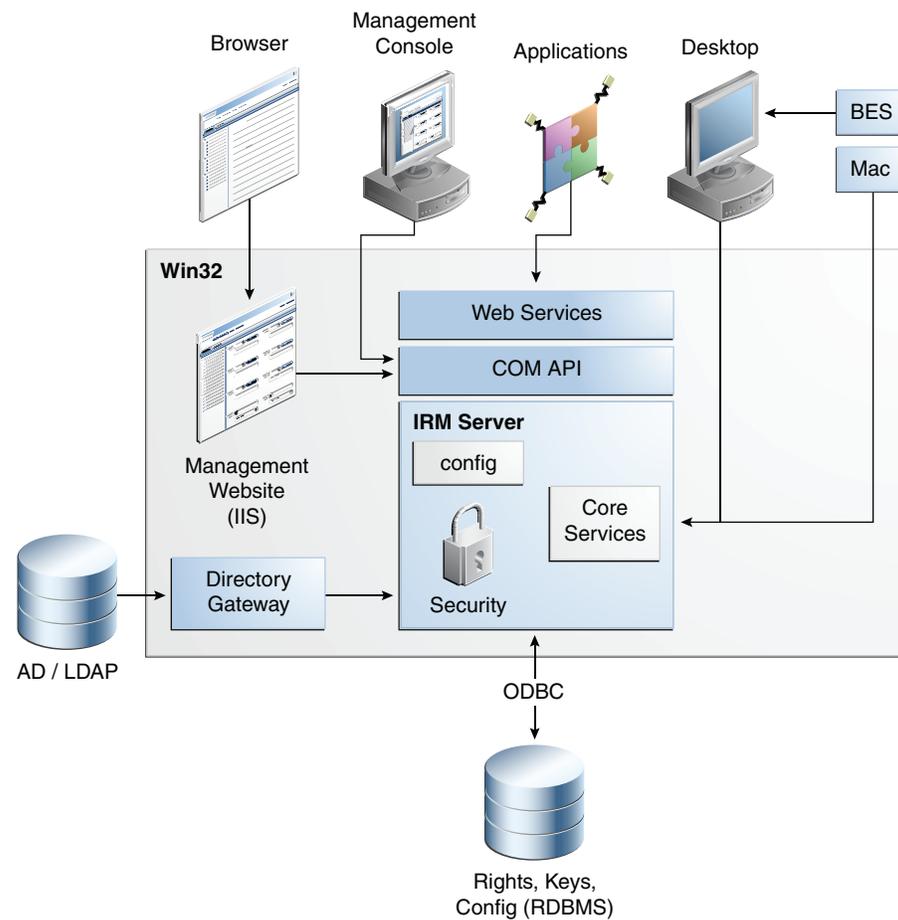
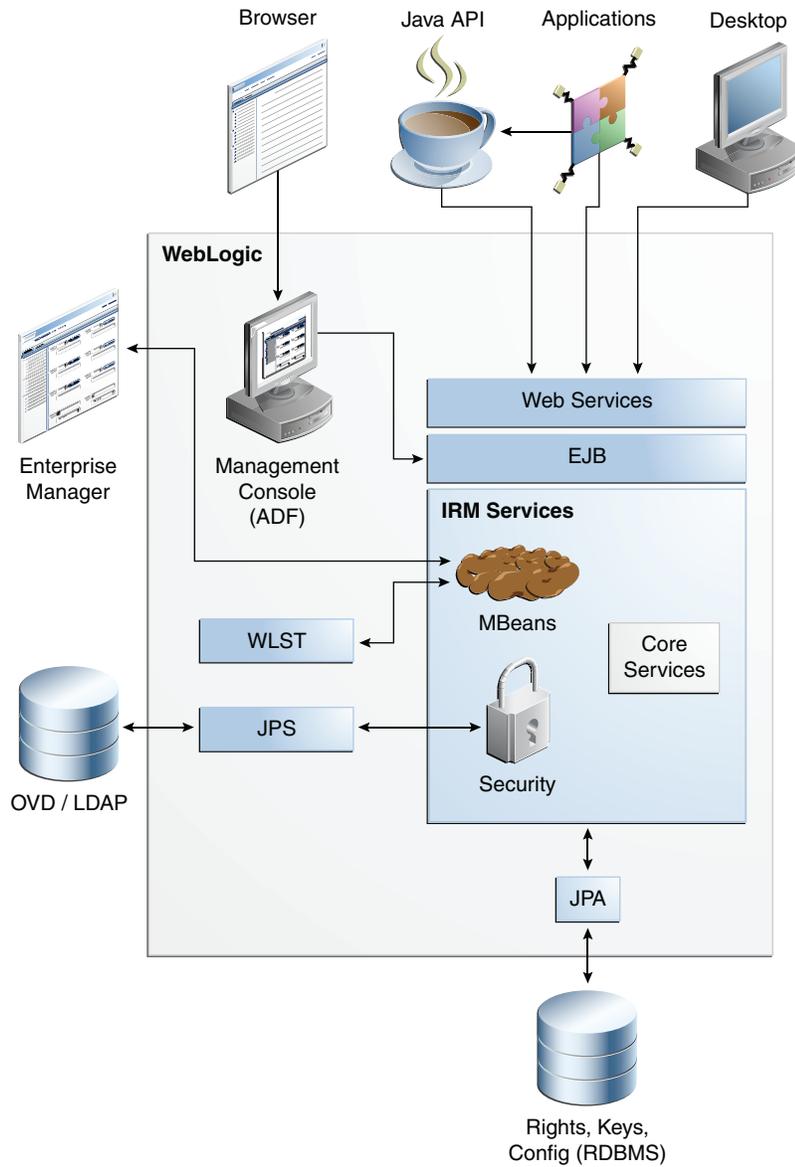


Figure 3–6 illustrates the Oracle IRM 11g as a Java EE application, running on Oracle WebLogic Server:

Figure 3–6 Oracle IRM Server 11g Running on Oracle WebLogic Server



3.7 Additional Resources

Table 3–1 lists other Oracle Enterprise Content Management Suite component documentation.

Table 3–1 Additional Information for Oracle Enterprise Content Management Suite Components

Component	Location of Information
Oracle UCM	<p><i>Oracle Fusion Middleware Installation Guide for Oracle Enterprise Content Management Suite</i></p> <p><i>Oracle Fusion Middleware System Administrator's Guide for Content Server</i></p> <p><i>Oracle Fusion Middleware Developer's Guide for Content Server</i></p> <p><i>Oracle Fusion Middleware User's Guide for Content Server</i></p> <p><i>Oracle Fusion Middleware Services Reference Guide for Universal Content Management</i></p> <p><i>Oracle Fusion Middleware Idoc Script Reference Guide</i></p> <p><i>Oracle Fusion Middleware Administrator's Guide for Conversion</i></p>
Oracle URM	<p><i>Oracle Fusion Middleware Administrator's Guide for Universal Records Management</i></p> <p><i>Oracle Fusion Middleware Setup Guide for Universal Records Management</i></p> <p><i>Oracle Fusion Middleware Enterprise Deployment Guide for Oracle WebCenter</i></p> <p><i>Oracle Fusion Middleware User's Guide for Universal Records Management</i></p>
Oracle IRM	<p><i>Oracle Fusion Middleware Developer's Guide for Oracle IRM Server</i></p> <p><i>Oracle Fusion Middleware Web User Interface Developer's Guide for Oracle Application Development Framework</i></p> <p><i>Oracle Fusion Middleware Administrator's Guide for Oracle Information Rights Management Server</i></p>
Oracle I/PM	<p><i>Oracle Fusion Middleware Developer's Guide for Imaging and Process Management</i></p> <p><i>Oracle Fusion Middleware Administrator's Guide for Imaging and Process Management</i></p> <p><i>Oracle Fusion Middleware User's Guide for Imaging and Process Management</i></p>
See also	<p><i>Oracle Fusion Middleware Installation Guide for Oracle Enterprise Content Management Suite</i></p> <p><i>Oracle Fusion Middleware Enterprise Deployment Guide for Oracle Enterprise Content Management Suite</i></p>

Upgrading Your Oracle Enterprise Content Management Suite Environment

This chapter describes how to upgrade your existing Oracle Enterprise Content management 10g Release 3 (10.1.3) environment to Oracle Enterprise Content Management Suite 11g.

This chapter contains the following sections:

- [Task 1: Understand the Starting Points for Oracle Enterprise Content Management Suite Upgrade](#)
- [Task 2: Decide Upon an Oracle Enterprise Content Management Suite Topology](#)
- [Task 3: Install Enterprise Content Management Suite](#)
- [Task 4: Run the Upgrade Assistant to Upgrade the Oracle Enterprise Content Management Suite Schema](#)
- [Task 5: Configure the Enterprise Content Management Suite Domain](#)
- [Task 6: Use the Upgrade Assistant to Upgrade the Oracle Enterprise Content Management Suite Middle Tier](#)
- [Task 7: Perform Any Required Post-Upgrade Configuration Tasks](#)
- [Task 8: Verify the Oracle Enterprise Content Management Suite Upgrade](#)

4.1 Task 1: Understand the Starting Points for Oracle Enterprise Content Management Suite Upgrade

For information about starting points for Oracle UCM and Oracle URM, see [Chapter 2, "Supported Starting Points for Oracle Enterprise Content Management Suite."](#)

You should run an Oracle URM upgrade only when upgrading a full 10g Oracle URM system. If you are upgrading a 10g RM Corporate System or a 10g Content Server Adapter system, run the Oracle UCM upgrade, NOT the Oracle URM upgrade.

Note: When upgrading from Universal Records Management, Corporate Edition, functionality is now available similar to that provided in Oracle Universal Records Management 10g DoD Edition.

If you are currently running Oracle Fusion Middleware 11g, refer to the *Oracle Fusion Middleware Patching Guide*, which provides information about applying the latest Oracle Fusion Middleware patches.

This guide provides instructions for upgrading from Oracle Enterprise Content Manager 10g to the latest Oracle Enterprise Content Management Suite 11g.

If you are running a version of Oracle UCM or Oracle URM older than 10.1.3, you must upgrade to 10.1.3 version before attempting to upgrade to 11g.

4.2 Task 2: Decide Upon an Oracle Enterprise Content Management Suite Topology

To help you decide on a target topology for your Oracle Enterprise Content Management Suite 11g deployment, see [Chapter 3, "Oracle Enterprise Content Management Suite for 10g Users."](#) Chapter 3 compares 10g and 11g features, directory structures, and architecture. It also describes Oracle Enterprise Content Management Suite 11g integration with Oracle WebLogic Server and Oracle Fusion Middleware applications.

For more information about your Oracle Enterprise Content Management Suite topology in an Oracle Fusion Middleware implementation, see "Understanding Oracle Fusion Middleware Concepts" in the *Oracle Fusion Middleware Administrator's Guide* or the section "Directory Structure for Oracle Enterprise Content Management Suite" in the *Oracle Fusion Middleware Installation Guide for Oracle Enterprise Content Management Suite*

4.3 Task 3: Install Enterprise Content Management Suite

Before running the Upgrade Assistant to upgrade Oracle Universal Content Management or Oracle Universal Records Management, perform the following tasks:

- [Task 3a: Install Oracle WebLogic Server in Preparation for an Oracle Enterprise Content Management Suite Upgrade](#)
- [Task 3b: Install Oracle Enterprise Content Management Suite in Preparation for Upgrade](#)

Use the Oracle Universal Installer to install and configure Oracle Universal Content Management or Oracle Universal Records Management 11g. Do not run the Repository Configuration Utility (RCU), finalize the agent configuration, or configure Java EE components during the installation process. The 10g schemas are upgraded in place by Upgrade Assistant. Finalizing agent configuration and configuring Java components are completed after upgrading the 10g schemas using Upgrade Assistant.

Note that the procedures described in this section assume you have downloaded the latest version of Oracle WebLogic Server and Oracle Fusion Middleware 11g. For more information, refer to "Obtaining the Latest Oracle WebLogic Server and Oracle Fusion Middleware 11g Software" in the *Oracle Fusion Middleware Upgrade Planning Guide*.

4.3.1 Task 3a: Install Oracle WebLogic Server in Preparation for an Oracle Enterprise Content Management Suite Upgrade

Before you install the Oracle Enterprise Content Management Suite software, you must install the Oracle WebLogic Server software and create a Middleware home.

For more information about the Middleware home, see "Directory Structure for Oracle Enterprise Content Management Suite" in the *Oracle Fusion Middleware Installation Guide for Oracle Enterprise Content Management Suite*.

Note: You must install the Oracle WebLogic Server software on the same host as the Oracle Enterprise Content Management Suite 10g middle tier you are upgrading.

To install the Oracle WebLogic Server software on disk, refer to "Install Oracle WebLogic Server and Create the Middleware Home" in the *Oracle Fusion Middleware Quick Installation Guide for Oracle Enterprise Content Management Suite*.

4.3.2 Task 3b: Install Oracle Enterprise Content Management Suite in Preparation for Upgrade

The following sections provide information about installing Oracle Enterprise Content Management Suite in preparation for upgrade:

- [Before You Install Oracle Enterprise Content Management Suite in Preparation for Upgrade](#)
- [Installing Oracle Enterprise Content Management Suite](#)

4.3.2.1 Before You Install Oracle Enterprise Content Management Suite in Preparation for Upgrade

Before you begin installing the Oracle Enterprise Content Management Suite software, you must have the complete path to the Middleware home, which is created during Oracle WebLogic Server installation. The Middleware home contains the `user_projects` directory, which is the default location for the Oracle WebLogic Server domains, and the `wlserver` directory.

4.3.2.2 Installing Oracle Enterprise Content Management Suite

After you install the Oracle WebLogic Server software and create the Middleware home, you can then install the Oracle Enterprise Content Management Suite components.

To install Oracle Enterprise Content Management Suite:

1. Insert the CD-ROM or download the installer from the Oracle Technology Network (OTN):

`http://www.oracle.com/technology/software/index.html`

2. Start the installer.

On UNIX systems:

```
> ./runInstaller
```

On Windows systems:

```
D:\ setup.exe
```

3. Follow the instructions on the screen to install one or more of the Oracle Enterprise Content Management Suite components.

For other information about installing Oracle Enterprise Content Management Suite, refer to the following:

- For help on the options available on each screen, click **Help**.

- For more detailed information about the installation and configuration options, refer to the *Oracle Fusion Middleware Installation Guide for Oracle Enterprise Content Management Suite*.

4.4 Task 4: Run the Upgrade Assistant to Upgrade the Oracle Enterprise Content Management Suite Schema

Upgrade Assistant is installed automatically into the `bin` directory of your Oracle Enterprise Content Management Suite Oracle home. Follow the procedure in [Table 4-1](#) to run Upgrade Assistant to upgrade the Oracle Enterprise Content Management Suite database schemas.

Note: Oracle recommends performing a full backup of your Oracle UCM or Oracle URM database schema and file system before starting the upgrade.

Note: Before upgrading the database schema, shut down the 10g Content Server, Admin Server, and Web Server.

For Oracle UCM with an Oracle Database

You must create the `contentserver_role` before running the Upgrade Assistant to upgrade the UCM schema. You can create this role in one of the following two ways:

- Run the `IntradocDir/database/oracle/admin/contentserverrole.sql` script from the 10g instance.
- Executing the following SQL command as a DBA:

```
CREATE ROLE contentserver_role;
```

Table 4-1 *Running the Upgrade Assistant to Upgrade the Oracle ECM Schema*

Step	Screen	Description and Action Required
1	None.	To start the Upgrade Assistant using the graphical user interface: Change directory to the <code>ECM_ORACLE_HOME/bin</code> directory of the Oracle Fusion Middleware installation: For UNIX: <code>./ua</code> On a Windows operating system: <code>ua.bat</code>
2	Upgrade Assistant Welcome Screen for Oracle UCM Schema Upgrade	Click Next to continue.
3	Upgrade Assistant Specify Operation Screen for Oracle UCM Schema Upgrade	Select Upgrade Oracle Universal Content Management Schema , or Upgrade Oracle Universal Records Management Schema . Click Next to continue.

Table 4–1 (Cont.) Running the Upgrade Assistant to Upgrade the Oracle ECM Schema

Step	Screen	Description and Action Required
4	Upgrade Assistant Prerequisites Screen for Oracle UCM Schema Upgrade	<p>Be sure the Database backup completed and Database version is certified by Oracle for Fusion Middleware Upgrade check boxes are selected.</p> <p>Database schema backup completed - Oracle recommends that you backup your Oracle ECM repositories on the database before upgrading. The Upgrade Assistant does not verify that the repositories have been backed up, so this option serves as a reminder.</p> <p>Database version is certified by Oracle for Fusion Middleware upgrade - The Upgrade Assistant requires that the Oracle Data Integrator repositories reside on a supported database.</p> <p>A list of supported databases can also be found on the Oracle Technology Network (OTN) at http://www.oracle.com/technology/software/products/ias/files/fusion_certification.html</p> <p>Click Next to continue.</p>
5	Upgrade Assistant Specify Source Directory Screen for Oracle UCM Schema Upgrade	<p>Enter the path to the directory containing this server's <code>intradoc.cfg</code> file.</p> <p>You can use the Browse button to locate this directory.</p> <p>This is not the 10g IntradocDir but the directory containing the <code>intradoc.cfg</code> file, which describes the location of the 10g IntradocDir. For example, <code><IntradocDir>/bin</code>.</p> <p>Click Next to continue.</p>
6	Upgrade Assistant Specify Source Database Screen for Oracle UCM Schema Upgrade	<p>Enter the following:</p> <ul style="list-style-type: none"> ■ For Database Type, select the appropriate database type. Supported database types: <ul style="list-style-type: none"> ■ Oracle ■ Microsoft SQL Server ■ DB2 ■ For Connect String, enter the database URL, for example: <ul style="list-style-type: none"> <code>//host:port/service</code> for Oracle <code>//host:port;DatabaseName=dbname</code> for Microsoft SQL Server ■ For Source schema, enter the name of the existing 10g schema/database/user, for example, DEV_OCSERVER. ■ For Password, enter the password associated with the specified source schema. ■ For DBA Username, to log in as the Oracle SYS database account, specify SYS AS SYSDBA in this field. ■ For DBA Password, enter the password associated with the specified DBA Username. <p>Click Next to continue.</p>
7	Upgrade Assistant Examining Components Screen for Oracle UCM Schema Upgrade	<p>The Upgrade Assistant examines the schema and initializes the Oracle Enterprise Content Management Suite component database plugin.</p> <p>Under the Status column, the word succeeded should appear. If instead, the word failed appears, inspect the log file for details.</p> <p>Click Next to continue.</p>

Table 4–1 (Cont.) Running the Upgrade Assistant to Upgrade the Oracle ECM Schema

Step	Screen	Description and Action Required
8	Upgrade Assistant Upgrade Summary Screen for Oracle UCM Schema Upgrade	Click Upgrade .
9	Upgrade Assistant Upgrading Components Screen for Oracle UCM Schema Upgrade	<p>Wait for the status bar to reach 100%.</p> <p>If there are errors during the upgrade, inspect the log file for details. The log files are located in the following directory:</p> <p><i>ECM_ORACLE_HOME</i>/upgrade/logs/ua<timestamp>.log</p> <p>For Windows Operating Systems:</p> <p><i>ECM_ORACLE_HOME</i>\upgrade\logs\ua<timestamp>.log</p> <p>Where <timestamp> is the current date and time.</p> <p>Click Next to continue.</p>
10	Upgrade Assistant Upgrade Complete Screen for Oracle UCM Schema Upgrade	Click Close .

4.5 Task 5: Configure the Enterprise Content Management Suite Domain

Use the Oracle Enterprise Content Management Suite Configuration Wizard to configure your new Oracle UCM or Oracle URM 11g WebLogic domain.

When you configure Oracle Enterprise Content Management Suite to create an Oracle WebLogic Server domain, a domain directory is created under the *MW_HOME*/user_projects/domain directory. The directory for the domain where you configure Oracle Enterprise Content Management Suite contains the Administration Server and one or more Managed Servers, each hosting an Oracle Enterprise Content Management Suite application.

For detailed information about running the Configuration Wizard to configure your domain, see section 4.2, "Creating an Oracle WebLogic Server Domain," in the *Oracle Fusion Middleware Installation Guide for Oracle Enterprise Content Management Suite*

After you create the WebLogic Server domain, and before running the Upgrade Assistant to upgrade the middle tier, start the WebLogic Administration Server using the instructions in Section 7.1, "Starting the Administration Server" of the *Oracle Fusion Middleware Installation Guide for Oracle Enterprise Content Management Suite*

Oracle UCM DB2 Connection Pool Settings

When upgrading from Oracle URM 10g to 11g with a DB2 database, you must also set the following configuration variables to the connection pool of the Oracle URM datasource. After you configure your Oracle Enterprise Content Management Suite domain, use the WebLogic Administration Console to modify the following configuration variables for the Oracle URM data source:

```
createDefaultPackage=true
```

```
replacePackage=true
```

```
dynamicSections=500
```

For more information, see "Configure JDBC data sources" in the *WebLogic Server Administration Console online help*.

4.6 Task 6: Use the Upgrade Assistant to Upgrade the Oracle Enterprise Content Management Suite Middle Tier

Run Upgrade Assistant again to upgrade the Oracle Enterprise Content Management Suite middle tier.

To start the Upgrade Assistant using the graphical user interface:

Table 4–2 Running the Upgrade Assistant to Upgrade the Oracle ECM Schema

Step	Screen	Description and Action Required
1	None.	To start the Upgrade Assistant using the graphical user interface: Change directory to the ECM_ORACLE_HOME/bin directory of the Oracle Fusion Middleware installation: For UNIX: ./ua On a Windows operating system: ua.bat
2	Upgrade Assistant Welcome Screen for Oracle UCM Middle Tier Upgrade	Click Next to continue.
3	Upgrade Assistant Specify Operation Screen for Oracle UCM Middle Tier Upgrade	Select Upgrade Oracle Universal Content Management Middle Tier , or Upgrade Oracle Universal Records Management Middle Tier . Click Next to continue.
4	Upgrade Assistant Specify Source Directory Screen for Oracle UCM Middle Tier Upgrade	Enter the path to the directory containing this server's intradoc.cfg file. You can use the Browse button to locate this directory. This is not the 10g IntradocDir, but the directory containing the intradoc.cfg file, which describes the location of the 10g IntradocDir. For example, <IntradocDir>/bin. Click Next to continue.
6	Upgrade Assistant Specify Destination Directory Screen for Oracle UCM Middle Tier Upgrade	Enter the path to your 11g server instance (IntradocDir). The 10g files are copied into this directory, which becomes the new IntradocDir for this instance. This directory does not need to exist already; the upgrade process creates it. If you enter the path to an existing instance, the upgrade will fail. If the specified path already exists but does not have a configured UCM system in it, the upgrade process will back up all directories before overwriting them. Click Next to continue.
7	Upgrade Assistant Specify WebLogic Server Screen for Oracle UCM Middle Tier Upgrade	Enter the following: <ul style="list-style-type: none"> ▪ In the Host field, enter the WebLogic Admin Server's hostname, for example, localhost. ▪ In the Port field, enter the server's port number, for example, 7001. ▪ In the Username field, enter the admin user name, for example, weblogic. ▪ In the Password field, enter the password associated with the specified admin user. Click Next to continue.

Table 4–2 (Cont.) Running the Upgrade Assistant to Upgrade the Oracle ECM Schema

Step	Screen	Description and Action Required
8	Upgrade Assistant Upgrade Summary Screen for Oracle UCM Middle Tier Upgrade	You can expand the summary tree to view a detailed description of directories and files which are copied to the 11g instance. Click Upgrade .
9	Upgrade Assistant Upgrading Components Screen for Oracle UCM Middle Tier Upgrade	Wait for the status bar to reach 100%. If there are errors during the upgrade, inspect the log file for details. The log files are located in the following directory: <i>ECM_ORACLE_HOME/upgrade/logs/ua<timestamp>.log</i> For Windows Operating Systems: <i>ECM_ORACLE_HOME\upgrade\logs\ua<timestamp>.log</i> Where <timestamp> is the current date and time. Click Next to continue.
10	Upgrade Assistant Upgrade Complete Screen for Oracle UCM Middle Tier Upgrade	Click Close .

4.7 Task 7: Perform Any Required Post-Upgrade Configuration Tasks

Refer to [Chapter 5, "Oracle Enterprise Content Management Suite Post-Upgrade Tasks and Considerations"](#) for a description of the post-upgrade tasks and considerations you might need to perform for each of the Oracle Enterprise Content Management Suite components.

4.8 Task 8: Verify the Oracle Enterprise Content Management Suite Upgrade

To verify that your Oracle Enterprise Content Management Suite upgrade was successful:

1. Start the middle tier that are using the schema you just upgraded in Task 4.
For more information, see "Starting and Stopping Oracle Fusion Middleware" in the *Oracle Fusion Middleware Administrator's Guide*.
2. Run the Upgrade Assistant again and select **Verify Instance** on the Specify Operation page.
Follow the instructions on the screen for information on how to verify that specific Oracle Enterprise Content Management Suite components are up and running.
3. Use the Fusion Middleware Control to verify that the Oracle Enterprise Content Management Suite components are up and running.
For more information, see "Getting Started Using Oracle Enterprise Manager Fusion Middleware Control" in the *Oracle Fusion Middleware Administrator's Guide*.

Oracle Enterprise Content Management Suite Post-Upgrade Tasks and Considerations

This chapter describes post-upgrade steps required for upgrading your Oracle Enterprise Content Management Suite.

- [Post-Upgrade Tasks and Considerations for Oracle Universal Content Management](#)
- [Post-Upgrade Tasks and Considerations for Oracle Universal Records Management](#)
- [Installing Custom Components](#)

5.1 Post-Upgrade Tasks and Considerations for Oracle Universal Content Management

Perform these tasks after you have completed the procedure in [Section 4.6, "Task 6: Use the Upgrade Assistant to Upgrade the Oracle Enterprise Content Management Suite Middle Tier."](#)

Start the Managed Servers

For Oracle UCM, follow the instructions described in Chapter 5, "Configuring Oracle Universal Content Management," in the *Oracle Fusion Middleware Installation Guide for Oracle Enterprise Content Management Suite* to start the managed server.

Post-Upgrade Configuration Page

Instead of a post-installation Content Server Configuration page, a post-upgrade Content Server Configuration page appears. This page, which is available at <http://server:16200/cs/>, includes options for final configuration of Oracle UCM. It also presents a list of 10g components and how the Upgrade Assistant managed each component. For more information, see "Completing the Oracle UCM Configuration" in the *Oracle Fusion Middleware Installation Guide for Oracle Enterprise Content Management Suite*.

1. Under **Instance Information**, the original 10g weblayout and vault directories are shown. If you wish to move these directories, enter the new locations in this form.
2. Because the 11g server is running inside WebLogic Server, the `HttpServerAddress` may need to be changed. For example, if the 10g server was running under Apache, or any another Web server, it may have been running

on port 80 (the default for Web servers). The default port number inside WebLogic Server for Content Server is 16200, (in the Configuration Wizard, there was an option to change this value), so the `HttpServerAddress` must be updated to contain the correct TCP port number. The hostname portion of the server address may also need to be updated to reflect any changes. The default value for `HttpServerAddress` is derived from the current WebLogic Server settings after you start the managed server.

3. A list of components installed on the 10g server appears below the form fields. Many of these components are packaged with the 11g server, so those components are not copied during the upgrade. Some components may no longer be supported, and are not copied over for other reasons. This table describes the reason for each component. Custom components are also included in this list. The upgrade process builds each 10g custom component using the same mechanism that the Component Manager's "Download" uses to build a component (the same mechanism that Component Wizard's "Build" uses). The resulting components' zip files are copied into the 11g server but are not installed or enabled. Below the table is a description of where these component zip files are located. Take note of this location.
4. Click **Submit** to save these configuration changes. After successfully saving these changes, a page appears explaining that this node must be restarted.
5. Restart the managed servers.

5.1.1 OracleTextSearch with External Database or SES

If your Oracle UCM 10g instance has OracleTextSearch set up with an external database or SES, you must edit the associated database to remove the value in the **Configuration Class** setting, and restart the managed server.

5.1.2 Oracle UCM and File Store Provider

Using File Store Provider to spread content among multiple disk partitions is not supported in Oracle UCM 11g.

5.1.3 Oracle UCM and Connection Server

In 10g, the Connection Server component enabled content to be registered with a Content Server Archive, to be published by the Connection Server. This component is not supported in this UCM 11g release.

Note that the following features of Connection Server 10g are still available and are supported as long as Connection Server 10g is supported:

- Connection Server 10g enabled the publishing of files from a file system to multiple file systems. This is still supported. In future releases the same functionality will be provided by Deployment Server.
- Connection Server 10g can still be used to crawl an 11g Site Studio Web Site. However, a new component in UCM 11g, Site Studio Publisher, is the preferred method to crawl Site Studio web sites and produce static file representations of these sites. After the representation is made, the Connection Server can be used to publish the files or any other tool can be used to move the files from one server to another. (Note that Site Studio Publisher is not the same as the Site Studio Publishing Utility 10g).

5.1.4 Content Server User Logins and Oracle WebLogic Server

Although user logins can still be created and managed on Content Server with the User Admin applet, they are not valid for authentication purposes unless they also have been created on Oracle WebLogic Server.

If you use an LDAP server and create a user login with the same name as a local user defined in Content Server with the User Admin applet, the LDAP user is authenticated against LDAP when logging in, but receives roles assigned to the local user.

5.1.5 Oracle UCM Internal User Logins

In prior versions of Oracle UCM, there were two types of users defined:

- **External users:** In Oracle UCM 10g, when an external user logs in, Content Server used the external storage mechanism to validate the login, for example checking the username and password. In 11g with Oracle WebLogic Server, the administrators must configure WebLogic Server to use the same storage mechanism. Once that is working, those users can log in to WebLogic Server just as they did in UCM 10g. Their UCM username, password, saved preferences, and other information will be the same.
- **Local users:** In Oracle UCM 10g, when a local user logged in, Content Server validated the login by comparing the hashed passwords. In Oracle UCM 11g, with Oracle WebLogic Server, those users will not be able to login until WebLogic Server logins are created for each of the UCM logins. Once administrators somehow create those WebLogic Server logins, (using an external storage mechanism, or by creating accounts using Enterprise Manager), those users will be able to login to WebLogic Server using their new password. Their old UCM username, saved preferences, and some other information will remain the same; though the password will likely be changed.

When a new WebLogic Server login is created, that user can log in through WebLogic Server and Content Server creates a user directory for that user. Content Server uses this directory for maintaining saved preferences and other information about that user. If that directory already exists, the existing preferences will apply to this user. As a result, when an old 10g UCM "local" user logs in to a newly-created 11g WebLogic Server login with the same username, their 10g preferences will already exist and the system will work as expected.

5.1.6 Customized Properties in Previous Oracle UCM Versions

If the properties of metadata fields used by standard components have been customized in a previous version of Oracle UCM, those customizations may need to be reapplied after the upgrade. After upgrading the properties are automatically reset to reflect the default preferences. For example, if a field has been customized to be visible on a checkin page in a previous version, after the upgrade that field may be invisible again because the default rules for the component are applied.

5.1.7 Microsoft SQL Server Schema Name and JDBC Username

When upgrading Oracle UCM with a Microsoft SQL Server database, the schema name and the JDBC username must be the same or the schema upgrade will fail.

5.1.8 Inbound Refinery Upgrade

Oracle does not recommend upgrading Inbound Refinery (IBR) from previous versions. Instead, install and configure the 11g version of Inbound Refinery and adjust the Content Server provider to use the newly installed application.

5.2 Post-Upgrade Tasks and Considerations for Oracle Universal Records Management

For Oracle URM, follow the instructions described in Chapter 9, "Configuring Oracle Universal Records Management," in the *Oracle Fusion Middleware Installation Guide for Oracle Enterprise Content Management Suite* to start the managed server.

For Oracle URM post-upgrade tasks, follow the same steps as described in [Section 5.1, "Post-Upgrade Tasks and Considerations for Oracle Universal Content Management."](#)

For more information about post-installation tasks for Oracle URM, See "Setting Up The Software" in *Oracle Fusion Middleware Setup Guide for Universal Records Management*.

5.2.1 Oracle URM Content Basket Creation

In previous versions of Oracle URM, each user was automatically assigned a content basket. In the current version of the software, you must create your own content baskets. Any items in your basket prior to upgrading are not retained.

5.2.2 Oracle URM Scheduled Jobs

If any jobs were scheduled in previous versions of Oracle URM, such as Scheduled Screening Reports and URM Agent Scheduled Events, those jobs must be rescheduled. Schedule times and frequency are not automatically assigned during the upgrade process.

5.2.3 Oracle URM Custom Dispositions

If custom dispositions were previously created using an older version of Oracle URM, those dispositions should be re-examined and updated to use the newest services and actions. The Action Service parameters have changed from previous versions of this software and any changes to existing custom dispositions are not mapped automatically.

5.2.4 Oracle PCM Customized Icons

If customized icons were created in a previous version of the Physical Content Management software, they are not automatically transferred during an upgrade. They must be copied after upgrading.

5.2.5 Oracle URM Enable Features Display

After upgrading to 11g, you must navigate to the **Enabled Features** page, configure your system to the desired installation level, and click the **Submit** button. If there is a dependency on existing data, some features and actions are auto enabled by the system during the submission of this display. Before performing any type of setup steps following the **Configure Installation** link in the setup checklist display, you must submit (save) this display, and restart Content Server.

5.2.6 Dropping Oracle URM 10g Tables

When you install RM or URM, several different database tables are created. When you uninstall them, those tables are not automatically removed. You must manually drop the tables to ensure that no data is accidentally lost. If you uninstall RM or URM but do not manually drop the tables, the upgrade process does not modify in any way. If you then attempted to reinstall RM or URM after the upgrade the old tables (from 10g) would conflict with the new 11g system.

5.2.7 Oracle URM Set Scripts Option

When creating a simple profile Oracle URM 11g, the **Set Scripts** option where you can enter pre-submit and post-submit scripts using idocscripts, is no longer available in Oracle URM 11g.

5.2.8 Oracle URM Simple Profile Settings

Verify all settings for Simple Profiles after upgrading. Some settings are not carried over automatically during the upgrade process.

5.3 Installing Custom Components

Oracle recommends testing all custom components in a development environment with an 11g content server before implementing them in a production environment. Changes in the content server may cause 10g customizations to behave differently or incorrectly.

1. Log in to the server through the Content Server UI.
2. Click the **Admin Server** link under the **Administration** menu, and select the **UCM Admin Server**.
3. For each 10g component to install in 11g, do the following:
 - a. Click the **advanced component manager** link under the **Component Manager** heading.
 - b. Click the **Browse** button in the **Install New Component** section.
 - c. Navigate to the `$IntradocDir/upgrade/components/` directory and select the component zip file.
 - d. Click the **Install** button.
 - e. Click the **Continue** button.
 - f. Click one of the **Click here** links to return to the Component Manager and optionally enable this component.
4. Once all desired components are installed, restart the managed server once more.

A

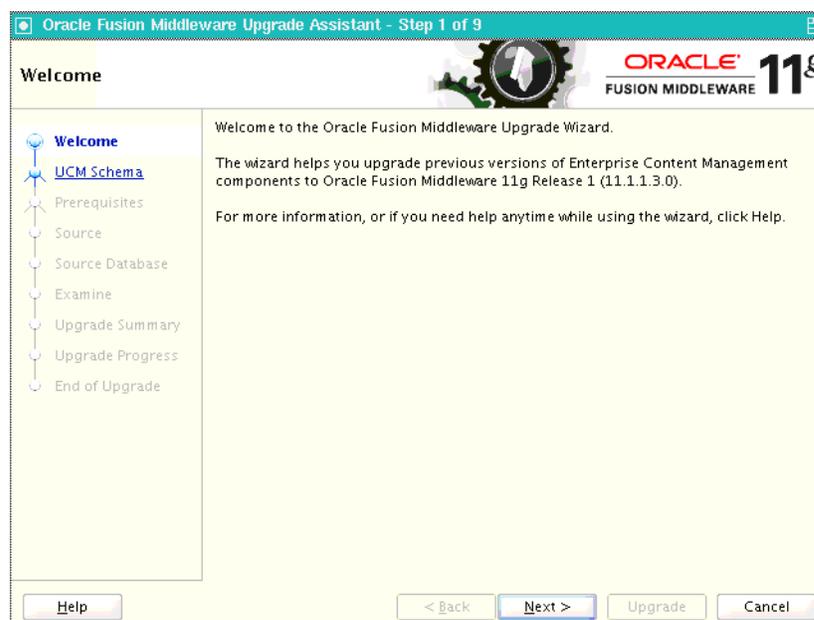
Oracle Enterprise Content Management Suite Upgrade Assistant Screens

When upgrading Oracle Fusion Middleware 11g ECM Suite, you can use Upgrade Assistant To upgrade Oracle UCM or Oracle URM. The procedures for upgrade Oracle URM and Oracle UCM using Upgrade Assistant are the same. The screens in this appendix chapter represent an example upgrade of Oracle UCM.

A.1 Upgrade Assistant Screens for an Oracle UCM Schema Upgrade

This section show the Upgrade Assistant screens for an Oracle UCM schema upgrade.

A.1.1 Upgrade Assistant Welcome Screen for Oracle UCM Schema Upgrade

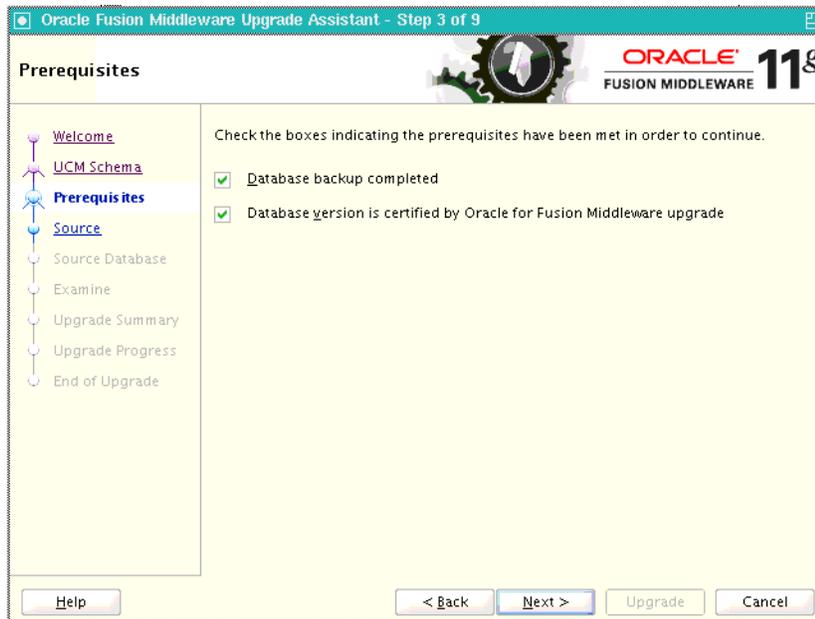


A.1.2 Upgrade Assistant Specify Operation Screen for Oracle UCM Schema Upgrade

This is the Specify Operation screen for the UCM Schema upgrade.



A.1.3 Upgrade Assistant Prerequisites Screen for Oracle UCM Schema Upgrade

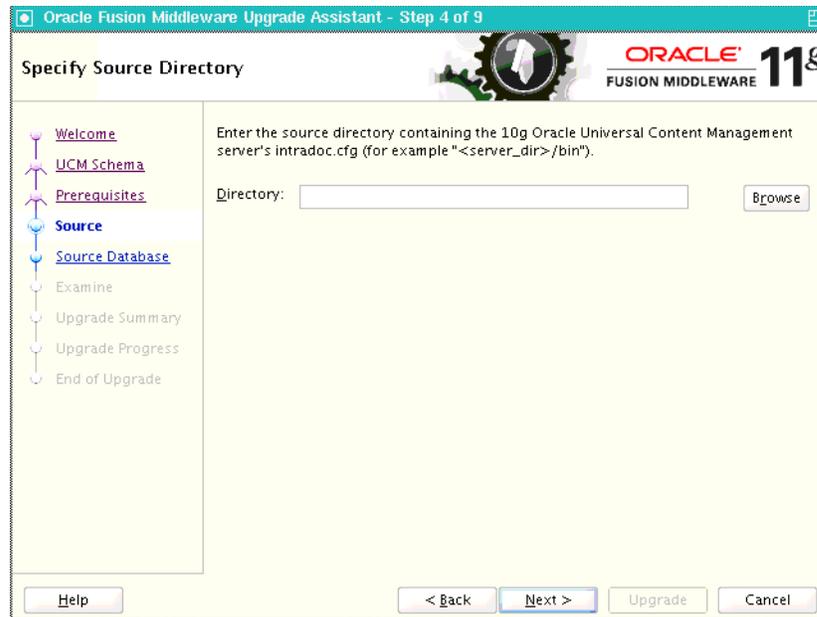


Be sure the **Database schema backup completed** and **Database version is certified by Oracle for Fusion Middleware upgrade** check boxes are selected, and click **Next**.

Prerequisite	Description
Database schema backup completed	Oracle recommends that you backup your Oracle ECM repositories on the database before upgrading. The Upgrade Assistant does not verify that the repositories have been backed up, so this option serves as a reminder.

Prerequisite	Description
Database version is certified by Oracle for Fusion Middleware upgrade	<p>The Upgrade Assistant requires that the Oracle Data Integrator repositories reside on a supported database.</p> <p>A list of supported databases can also be found on the Oracle Technology Network (OTN) at http://www.oracle.com/technology/software/products/ias/files/fusion_certification.html.</p>

A.1.4 Upgrade Assistant Specify Source Directory Screen for Oracle UCM Schema Upgrade



Enter the path to the directory containing this server's `intradoc.cfg` file, and click **Next**.

You can use the **Browse** button to locate this directory.

Note: This is not the 10g IntradocDir but the directory containing the `intradoc.cfg` file, which describes the location of the 10g IntradocDir.

A.1.5 Upgrade Assistant Specify Source Database Screen for Oracle UCM Schema Upgrade



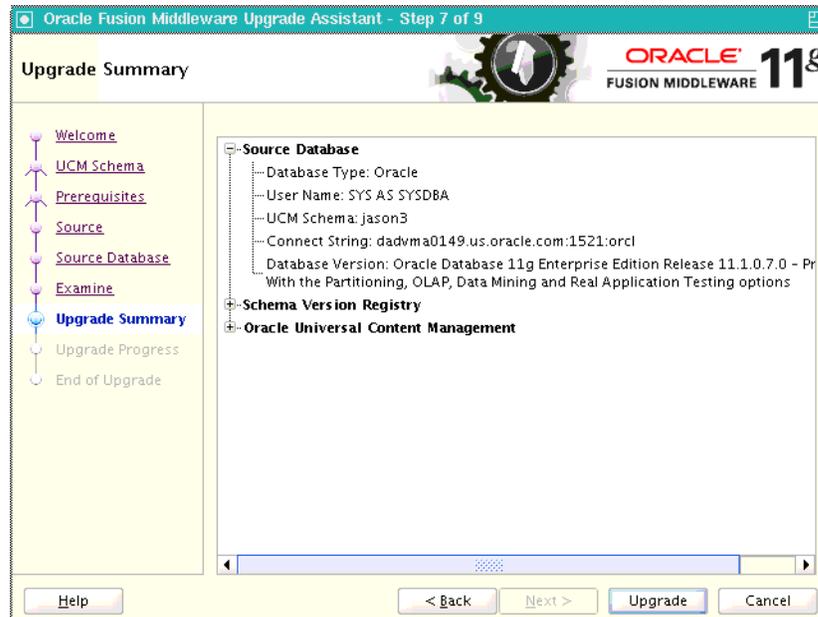
A.1.6 Upgrade Assistant Examining Components Screen for Oracle UCM Schema Upgrade

This is the Examining Components screen for a UCM schema upgrade procedure.



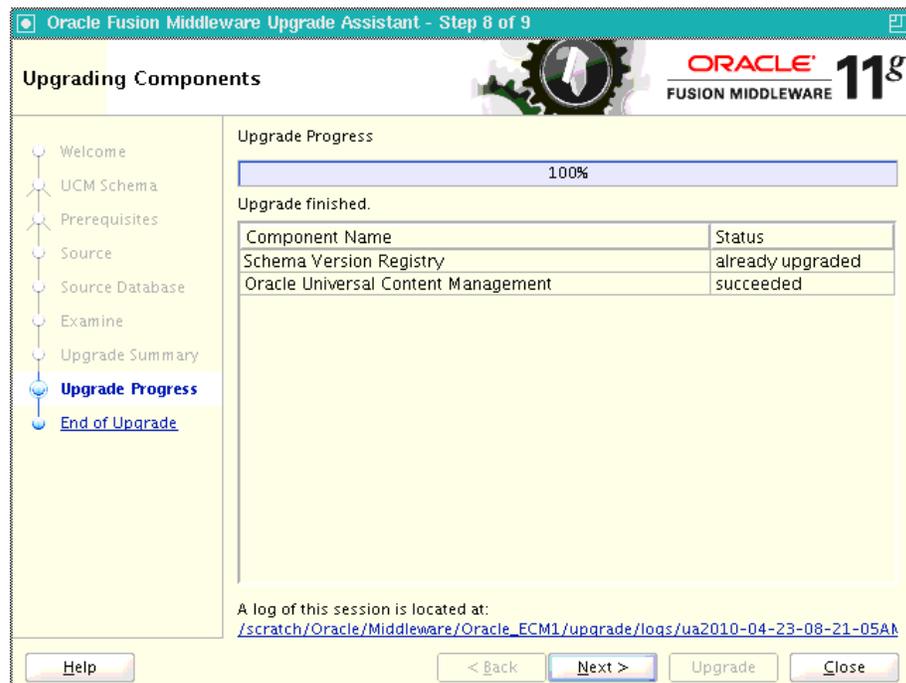
A.1.7 Upgrade Assistant Upgrade Summary Screen for Oracle UCM Schema Upgrade

This is the Upgrade Summary screen for a UCM schema upgrade.



A.1.8 Upgrade Assistant Upgrading Components Screen for Oracle UCM Schema Upgrade

This is the Upgrading Components screen for a UCM schema upgrade.



A.1.9 Upgrade Assistant Upgrade Complete Screen for Oracle UCM Schema Upgrade

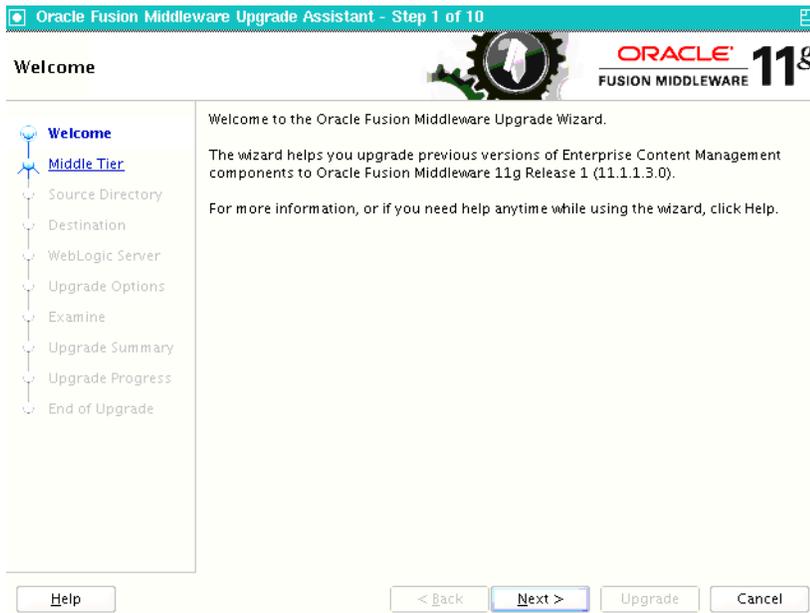
This is the Upgrading Complete screen for a UCM schema upgrade.



A.2 Upgrade Assistant Screens for an Oracle UCM Middle Tier Upgrade

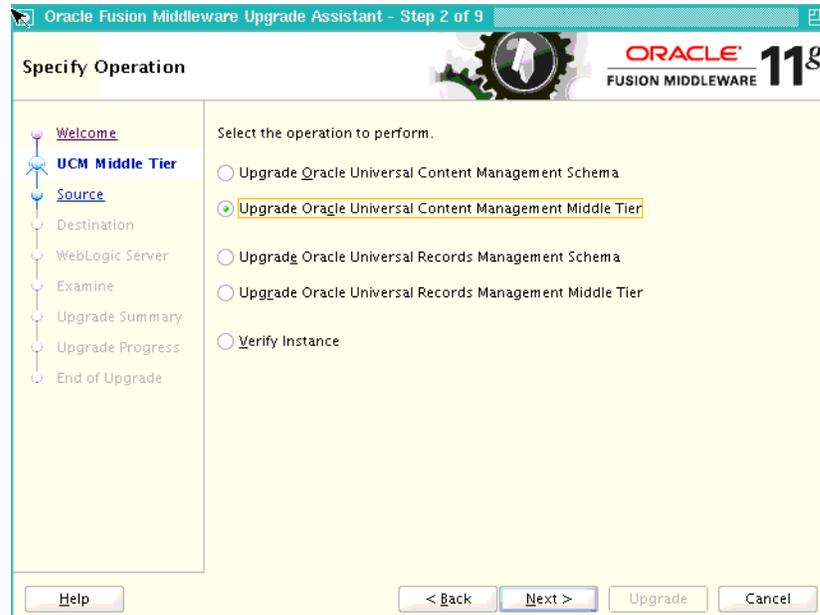
This section show the Upgrade Assistant screens for an Oracle UCM Middle Tier upgrade.

A.2.1 Upgrade Assistant Welcome Screen for Oracle UCM Middle Tier Upgrade



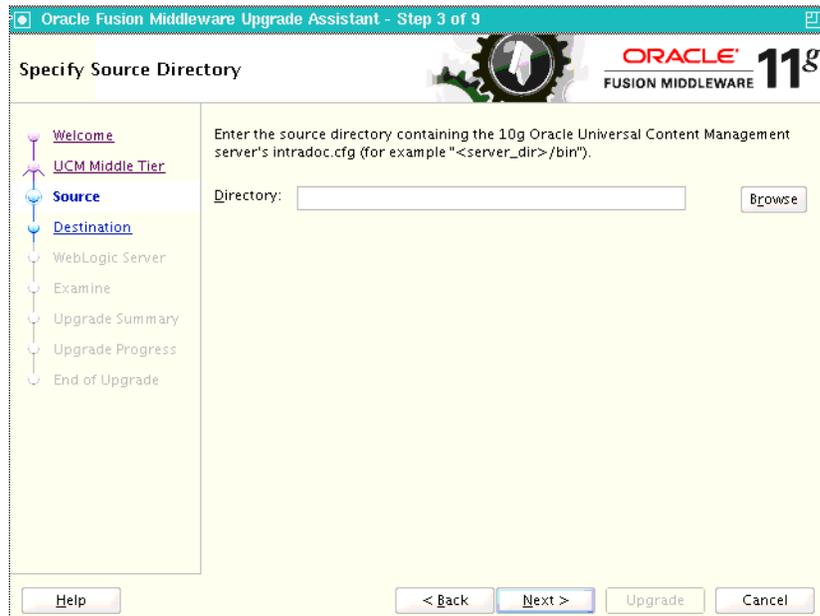
A.2.2 Upgrade Assistant Specify Operation Screen for Oracle UCM Middle Tier Upgrade

This is the Specify Operation screen for the UCM middle tier upgrade.



A.2.3 Upgrade Assistant Specify Source Directory Screen for Oracle UCM Middle Tier Upgrade

This is the Specify Source Directory screen for a UCM middle tier upgrade.



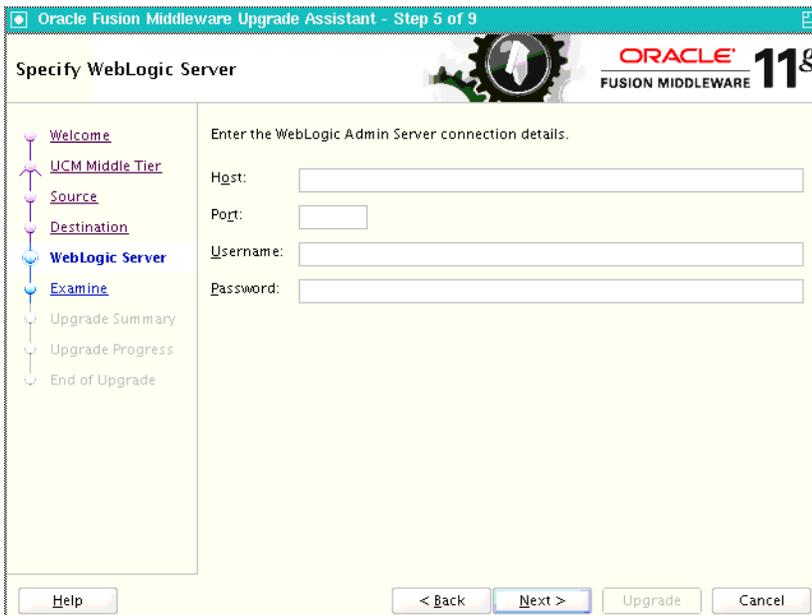
A.2.4 Upgrade Assistant Specify Destination Directory Screen for Oracle UCM Middle Tier Upgrade

This the Specify Destination Directory screen for a UCM middle tier upgrade.



A.2.5 Upgrade Assistant Specify WebLogic Server Screen for Oracle UCM Middle Tier Upgrade

This is the Specify WebLogic Server screen for a UCM middle tier upgrade.



A.2.6 Upgrade Assistant Examining Components Screen for Oracle UCM Middle Tier Upgrade

This is the Examining Components screen for a UCM Middle Tier upgrade procedure.



A.2.7 Upgrade Assistant Upgrade Summary Screen for Oracle UCM Middle Tier Upgrade

This is the Upgrade Summary screen for a UCM middle tier upgrade.



A.2.8 Upgrade Assistant Upgrading Components Screen for Oracle UCM Middle Tier Upgrade

This the Upgrading Components screen for a UCM middle tier upgrade.



A.2.9 Upgrade Assistant Upgrade Complete Screen for Oracle UCM Middle Tier Upgrade

This is the Upgrading Complete screen for a UCM middle tier upgrade.



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