

Oracle® Fusion Middleware

Upgrade Guide for Oracle WebCenter Content

11g Release 1 (11.1.1.7.0)

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Oracle Fusion Middleware Upgrade Guide for Oracle WebCenter Content, 11g Release 1 (11.1.1.7.0)

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Primary Author: Wortimla RS

Contributing Author: Jean Wilson, Bruce Silver

Contributor: Rick Petty, Lisa Zitek-Jones, Jason Schindhelm, Sancho Pinto, Andy Peet, Brian Johnson, Reza Shafii, Indira Smith

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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 WebCenter Content Upgrade Process

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

This chapter contains the following sections:

- [Section 1.1, "Special Instructions for Oracle Enterprise Content Management 10g Users"](#)
- [Section 1.2, "Flow Chart of the Oracle WebCenter Content Upgrade Process"](#)
- [Section 1.3, "Table Describing the Steps in the Oracle WebCenter Content Upgrade Process"](#)

1.1 Special Instructions for Oracle Enterprise Content Management 10g Users

The Oracle Enterprise Content Management Suite is renamed to Oracle WebCenter Content for 11g. [Table 1-1](#) lists the component names in 10g and their corresponding names in 11g.

Table 1-1 Oracle WebCenter Content Component Names in 10g and 11g

Oracle Enterprise Content Management Suite 10g	Oracle WebCenter Content 11g
Oracle Imaging and Process Management	Oracle WebCenter Content: Imaging
Oracle Information Rights Management	Oracle Information Rights Management
Oracle Universal Content Management	Oracle WebCenter Content
Oracle Universal Records Management	Oracle WebCenter Content: Records

1.2 Flow Chart of the Oracle WebCenter Content Upgrade Process

[Figure 1-1](#) provides a flow chart of the Oracle WebCenter Content upgrade process. Review this chart to familiarize yourself with the steps you must take, based on your existing Oracle Fusion Middleware environment.

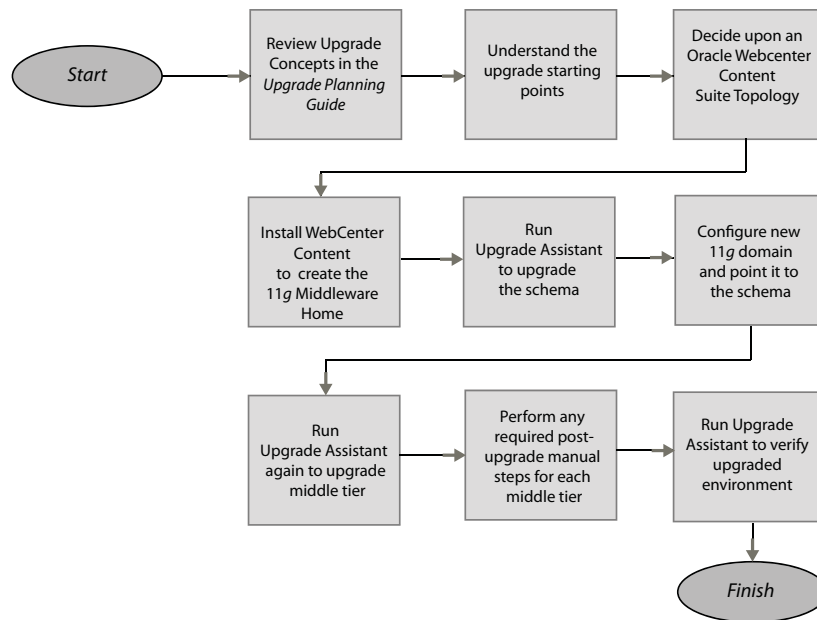
Note: This guide documents upgrading Oracle Universal Content Management 10g and Oracle Universal Records Management 10g, using Upgrade Assistant.

For information about upgrading Oracle Information Rights Management 10g and Oracle Imaging and Process Management 10g, contact Oracle Support.

Oracle WebCenter Content Components

Whether you are upgrading Oracle Universal Content Management 10g or Oracle Universal Records Management 10g, the upgrade process is the same. However, you must upgrade the Oracle Enterprise Content Management Suite 10g component schemas before you upgrade the middle tiers.

Figure 1–1 Flow Chart of the Oracle WebCenter Content Upgrade Process



1.3 Table Describing the Steps in the Oracle WebCenter Content Upgrade Process

Table 1–2 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 1–2 Oracle WebCenter Content Upgrade Process

Step	Description	More Information
Review Upgrade Concepts in the <i>Oracle Fusion Middleware Upgrade Planning Guide</i>	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. It includes compatibility information and instructions for upgrading any databases that support your middleware components.	see, <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 WebCenter Content upgrade.	Task 1: Understanding the Starting Points for Oracle WebCenter Content Upgrade
Decide upon an Oracle WebCenter Content 11g Topology	Before you begin an upgrade, make sure you are familiar with the basic topologies of Oracle Fusion Middleware 11g.	Task 2: Deciding Upon an Oracle WebCenter Content Topology
Install Oracle WebCenter Content to create the 11g Middleware Home	Install WebLogic Server to create the Middleware home, and then install Oracle WebCenter Content11g.	Task 3: Install Oracle Fusion Middleware
Run Upgrade Assistant to upgrade the schema	Upgrade the database schemas in-place for either Oracle WebCenter Content or Oracle WebCenter Content: Records.	Task 4: Running the Upgrade Assistant to Upgrade the Oracle WebCenter Content Schema
Configure the New 11g domain and point it to the new schema	Use the Oracle WebCenter Content configuration Wizard to configure your new Oracle Fusion Middleware middle tiers.	Task 5: Configuring the Oracle WebCenter Content 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 10g middle tiers to the newly installed Oracle WebCenter Content or Oracle WebCenter Content: Records middle tiers.	Task 6: Using the Upgrade Assistant to Upgrade the Oracle WebCenter Content 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: Performing 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: Verifying the Oracle WebCenter Content Upgrade

Supported Starting Points for Oracle WebCenter Content

This chapter talks about the supported starting points for upgrading to Oracle WebCenter Content 11g.

It contains the following sections:

- [Section 2.1, "Supported Starting Points for Oracle Universal Content Management 10g"](#)
- [Section 2.2, "Supported Starting Points for Oracle Universal Records Management 10g"](#)
- [Section 2.3, "Upgrading Oracle Imaging and Process Management 10g"](#)
- [Section 2.4, "Upgrading Oracle Information Rights Management 10g"](#)

Note: If you are running components of the Oracle WebCenter Content 11g Release 1 (11.1.1), then refer to the *Oracle Fusion Middleware Patching Guide*.

This guide describes how to upgrade from Oracle Enterprise Content Manager 10g to Oracle WebCenter Content 11g.

2.1 Supported Starting Points for Oracle Universal Content Management 10g

This guide provides instructions for upgrading from Oracle Universal Content Management (UCM) 10g release to Oracle WebCenter Content 11g, as described in [Table 2-1](#).

Table 2-1 Oracle Universal Content Management Release Supported by Oracle WebCenter Content

Release	Description or Notes
Oracle UCM 10g Release 3 (10.1.3)	You should run an Oracle UCM 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 Universal Content Management upgrade, NOT the Oracle URM upgrade.

Note: If you are running a version of Oracle Universal Content Management or Oracle Universal Records Management older than 10g Release 3 (10.1.3), you must upgrade to 10g Release 3 (10.1.3) version before you can upgrade to Oracle WebCenter Content 11g.

2.2 Supported Starting Points for Oracle Universal Records Management 10g

This guide provides instructions for upgrading from the Oracle Universal Records Management (URM) release to Oracle WebCenter Content: Records 11g, as described in [Table 2-2](#).

Table 2-2 Oracle Universal Records Management Release Supported by Oracle WebCenter Content: Records

Release	Description or Notes
Oracle Universal Records Management 10g Release 3 (10.1.3)	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 Universal Content Management upgrade, NOT the Oracle URM upgrade.

Note: If you are running a version of Oracle Universal Content Management or Oracle Universal Records Management older than 10g Release 3 (10.1.3), you must upgrade to 10g Release 3 (10.1.3) version before attempting to upgrade to Oracle WebCenter Content 11g.

2.3 Upgrading Oracle Imaging and Process Management 10g

Upgrade Assistant does not support upgrading from Oracle Imaging and Process Management (Oracle I/PM) 10g to Oracle WebCenter Content: Imaging 11g.

For information about upgrading Oracle I/PM 10g to Oracle WebCenter Content: Imaging 11g, contact Oracle Support.

2.4 Upgrading Oracle Information Rights Management 10g

Upgrade Assistant does not support upgrading from Oracle Information Rights Management 10g to Oracle Information Rights Management 11g.

For the information about upgrading Oracle Information Rights Management 10g to Oracle Information Rights Management 11g, contact Oracle Support.

Oracle WebCenter Content for 10g Users

This chapter introduces some key concepts of the Oracle WebCenter Content 11g environment for Oracle Enterprise Content Management Suite 10g users:

This chapter contains the following sections:

- [Section 3.1, "Oracle WebCenter Content Components"](#)
- [Section 3.2, "Oracle WebCenter Content and Oracle WebLogic Server"](#)
- [Section 3.3, "Directory Structure for Oracle WebCenter Content"](#)
- [Section 3.4, "Changes to Oracle WebCenter Content and Oracle WebCenter Content: Records"](#)
- [Section 3.5, "Changes to Oracle WebCenter Content: Imaging"](#)
- [Section 3.6, "Changes to Oracle Information Rights Management"](#)
- [Section 3.7, "Additional Resources"](#)

3.1 Oracle WebCenter Content Components

Oracle WebCenter Content, 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 WebCenter Content comprises of a number of different components including:

- Oracle WebCenter Content
- Oracle WebCenter Content: Records
- Oracle Information Rights Management
- Oracle WebCenter Content: Imaging

For information about all Oracle WebCenter Content components, see the *Oracle WebCenter Content Concepts Guide*.

3.2 Oracle WebCenter Content and Oracle WebLogic Server

The most significant difference between Oracle Enterprise Content Manager 10g and Oracle WebCenter Content 11g, is the deployment to Oracle WebLogic Server, and the integration of Oracle WebCenter Content 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 "Introduction to Oracle Fusion Middleware" in the *Oracle Fusion Middleware Administrator's Guide*.

Oracle WebLogic Server Middleware Home

Oracle WebCenter Content 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
  WC_CONTENT_ORACLE_HOME
  user_projects
```

The Oracle WebCenter Content home contains the binary and library files necessary for Oracle Enterprise Content Management (ECM) suite. *WC_CONTENT_ORACLE_HOME* represents the ECM Oracle home in path names.

The Oracle WebCenter Content home can be associated with multiple Oracle WebLogic Server domains. The Oracle Common home contains the binary and library files required for Oracle WebCenter Content 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 the *Oracle Fusion Middleware Administrator's Guide*.

3.3 Directory Structure for Oracle WebCenter Content

Figure 3–1 shows the default directory structure of an Oracle WebCenter Content 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*). The Oracle Common home directory contains the binary and library files required for the Oracle Enterprise Manager, Fusion Middleware Control, and Java Required Files (JRF).

When you install Oracle WebCenter Content, a WebCenter Content Oracle home directory for the suite (*WC_CONTENT_ORACLE_HOME*) is created under the Middleware home directory. The WebCenter Content Oracle home directory contains the binary and library files for Oracle WebCenter Content.

When you configure Oracle WebCenter Content 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 in which you configure Oracle WebCenter Content contains the Administration Server and one or more Managed Servers, each hosting an Oracle WebCenter Content application. Based on the application or applications that you install, the following Managed Servers are created:

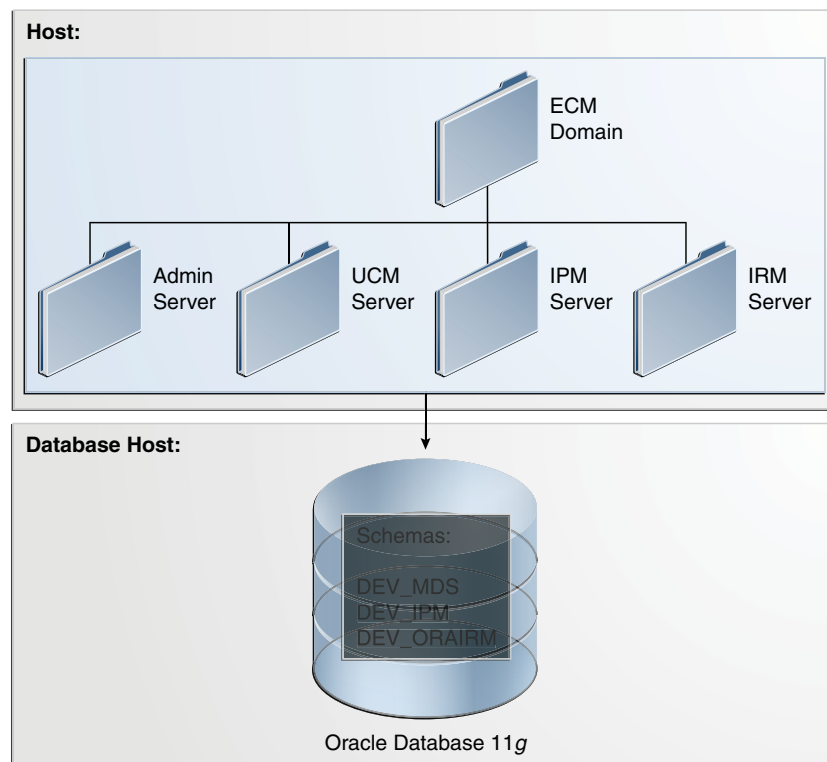
- Oracle WebCenter Content: Imaging Managed Server
- Oracle Information Rights Management Managed Server
- Oracle WebCenter Content Managed Server
- Oracle WebCenter Content: Records Managed Server

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

Note: 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.

Oracle recommends keeping the domain directories outside the installation directory.

Figure 3–1 Directory Structure of an Oracle WebCenter Content Installation



The topology in Figure 3–1 includes multiple applications configured on the same host in one Oracle WebLogic Server domain that includes only Oracle WebCenter Content applications. The schemas for the applications are in the same database.

3.4 Changes to Oracle WebCenter Content and Oracle WebCenter Content: Records

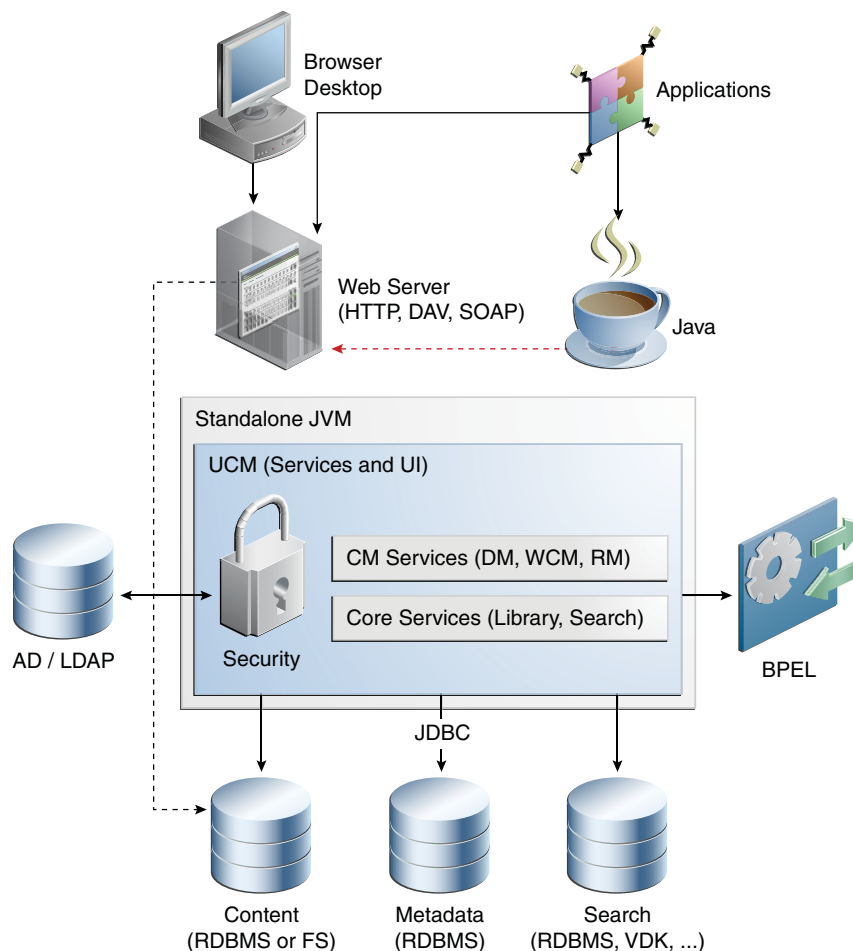
This section summarizes changes to Oracle WebCenter Content and Oracle WebCenter Content: Records for Oracle Fusion Middleware 11g.

- [Architectural Changes](#)
- [New Features for Oracle WebCenter Content 11g Release 1 \(11.1.1\)](#)
- [Changed Features for Oracle WebCenter Content Release 11g \(11.1.1\)](#)
- [Changes to Oracle WebCenter Content: Records](#)

3.4.1 Architectural Changes

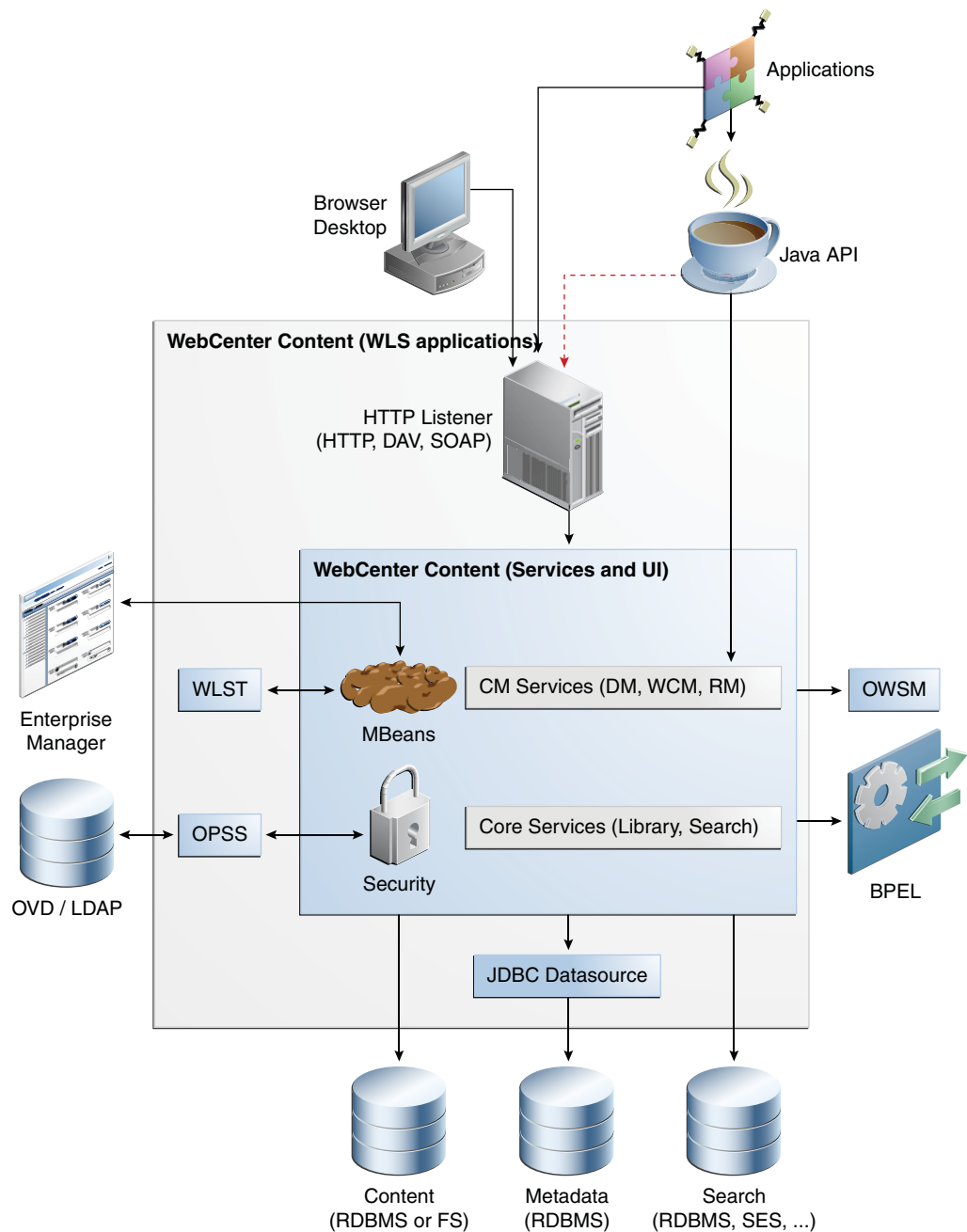
[Figure 3–2](#) shows the basic architecture of Oracle Universal Content Management 10g. The Oracle URM structure is the same.

Figure 3–2 Oracle Universal Content Management Topology in 10g Release 2 (10.1.2)



[Figure 3–3](#) shows the basic architecture of Oracle WebCenter Content 11g. The Oracle WebCenter Content: Records 11g architecture is the same.

Figure 3–3 The Oracle WebCenter Content Architecture for Oracle Fusion Middleware11g



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

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

- Folders:** This component, installed and enabled by default, provides a hierarchical folder interface within the browser, similar to a conventional file system. This component is used for organizing, locating, and managing repository content and content item metadata. This is a scalable, enterprise solution and is a replacement for the earlier Contribution Folders interface. For information about migrating

content from the earlier Contribution Folders interface, see *Oracle WebCenter Content System Administrator's Guide for Content Server*.

- **Web services:** Oracle WebCenter Content 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 WebCenter Content, which means changes in configuring and administering Oracle WebCenter Content. For more information, see *Oracle WebCenter Content System Administrator's Guide for Content Server*.

For more information, see "What's New" in the *Oracle Fusion Middleware Application Administrator's Guide for Content Server*.

3.4.3 Changed Features for Oracle WebCenter Content Release 11g (11.1.1)

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

- **Directory Structure:** The directory structure of an installed Oracle WebCenter Content 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 WebCenter Content Release 11gR1 (11.1.1) installation:
 - *IdcHomeDir*: The variable used to refer to the directory in *WC_CONTENT_ORACLE_HOME* where the Oracle WebCenter Content 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 WebCenter Content 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 WebCenter Content 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 WebCenter Content 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 WebCenter Content.
- **WSDL Generator:** WSDL Generator is not supported.

- **Web Form Editor:** Web Form Editor user interface and FCKEditor are not supported.

3.4.4 Changes to Oracle WebCenter Content: Records

Previous versions of Oracle WebCenter Content 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 the 11.1.1.6.0 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 from the 11.1.1.7.0 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 may 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 are 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 for retention management.
 - Configuring the retention elements of the software: This includes setting options to use custom security fields, classification guides, and to choose how revisions, deleting, and editing 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 is configurable.
- **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. The assigned roles and retention administration rights are displayed as well.

- 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 WebCenter Content User's Guide for Records* .
- 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 item are used to populate option lists, such as 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 while 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 earlier releases, a zip file of the copied content was created and 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 WebCenter Content Services Reference Guide*. See the guide for details about the services and how to implement new services.
- **Screening** can now be accessed through the search menu.
- **Performance monitoring** can now be done through the Oracle WebCenter Content: Records interface. Performance statistics for batches, items, and processes can also 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 required, on the content check-in page.

3.5 Changes to Oracle WebCenter Content: Imaging

This section describes the significant changes from Oracle I/PM 10g to Oracle WebCenter Content: Imaging 11g

Note: Upgrade Assistant does not support upgrading Oracle Imaging and Process Management (Oracle I/PM) 10g to Oracle WebCenter Content: Imaging 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 WebCenter Content: Imaging integrates with Oracle Document Capture and Oracle Distributed Document Capture to allow you to convert physical documents into an electronic format that can be uploaded to Oracle WebCenter Content: Imaging. Ensure that Oracle Document Capture is configured with the Oracle WebCenter Content: Imaging 11g commit driver. For more information, see the administration documentation for Oracle Document Capture or Oracle Distributed Document Capture.

3.5.2 Integration with an Oracle Document Repository

Oracle WebCenter Content: Imaging 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 storing content in a variety of ways. Depending on your 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 as per WebCenter Content: Imaging application to provide the most applicable search capabilities.

3.5.3 Integration with Oracle WebLogic Server

Oracle WebCenter Content: Imaging 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

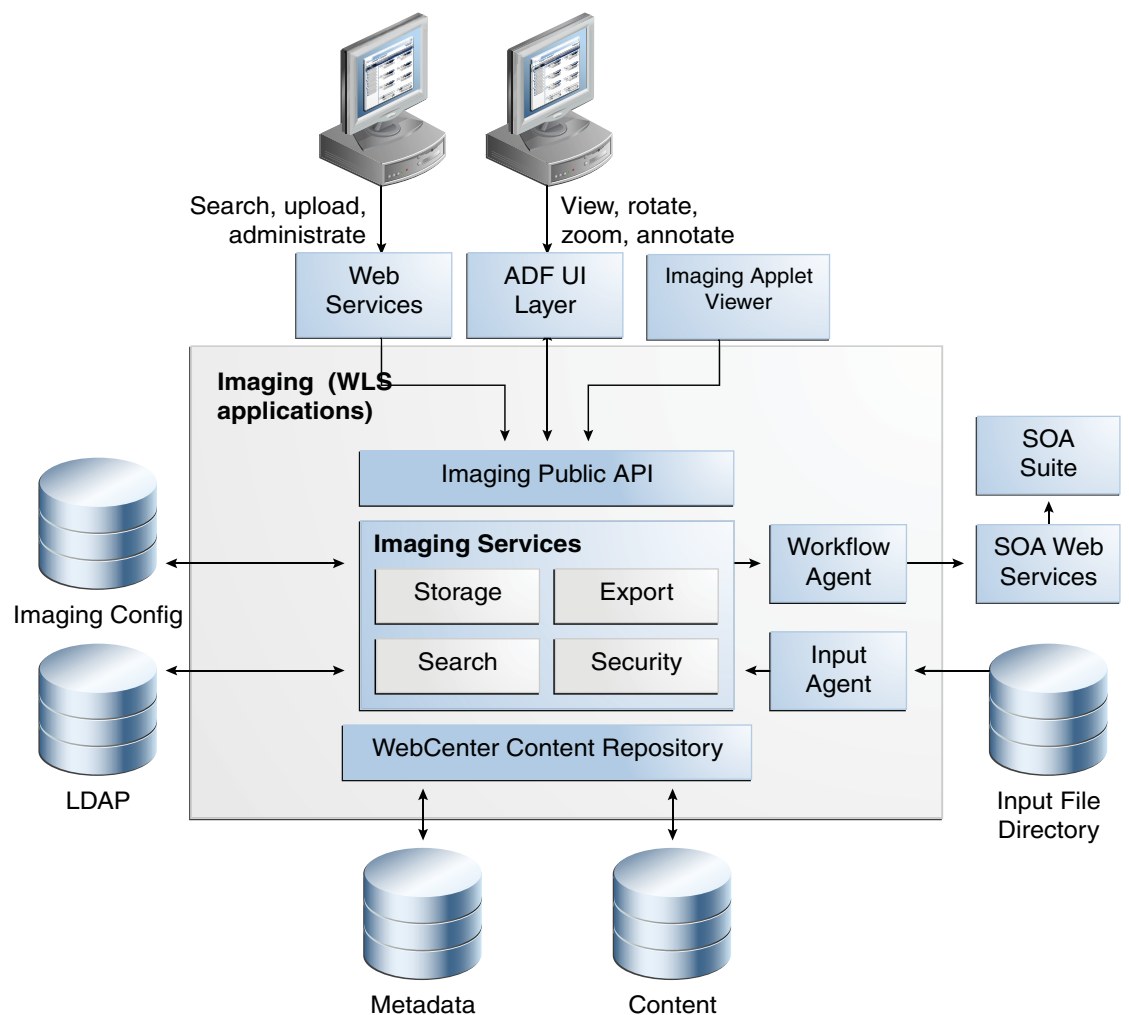
For production environments that require increased application performance, throughout, or high availability, you can configure two or more Managed Servers to operate as a cluster. A cluster is a collection of multiple Oracle WebLogic Server instances running simultaneously and working together to provide 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 cluster in WebLogic Server, see the *Oracle Fusion Middleware Using Clusters for Oracle WebLogic Server* guide.

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 WebCenter Content: Imaging, allowing business process integration across the enterprise.

Figure 3-4 illustrates the Oracle WebCenter Content: Imaging process overview.

Figure 3-4 Oracle WebCenter Content: Imaging Process Overview



3.6 Changes to Oracle Information Rights Management

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

Oracle Information Rights Management 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 Information Rights Management 11g, the Oracle Information Rights Management Server Management Console is a browser-based, graphical user interface used to manage Oracle Information Rights Management Server.

Oracle Information Rights Management Desktop

The Oracle Information Rights Management 11g Desktop is backward compatible with previous Oracle Information Rights Management 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 Information Rights Management Desktop features:

- **New communications protocol** - Web Services over HTTPS. Oracle Information Rights Management 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** - Supports 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 options to synchronize and check in operations.
- **Start Menu Entry** - The new Oracle Information Rights Management 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** options that launches the Update Rights page on the Desktop Options.

Oracle Information Rights Management Server

The 11g Oracle Information Rights Management 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 Information Rights Management 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
- Support for FIPS 140-2 certified crypto libraries

3.6.1 Architecture Changes to Oracle Information Rights Management

Figure 3–5 illustrates the Oracle IRM 10g server running on Windows:

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

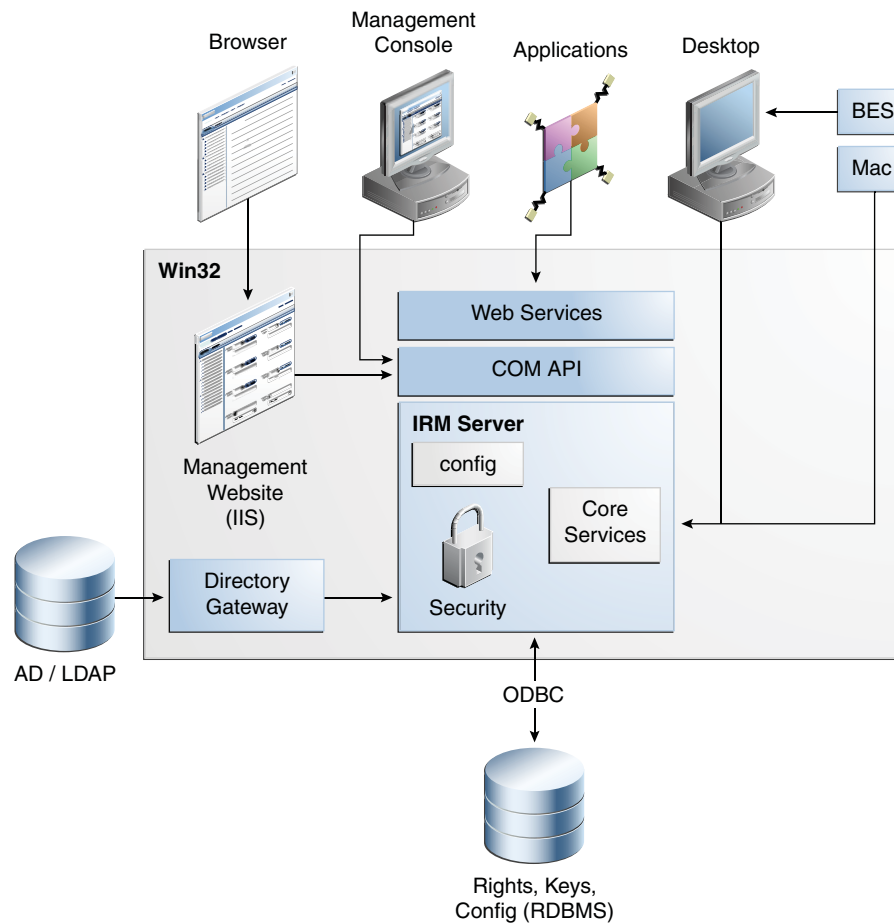
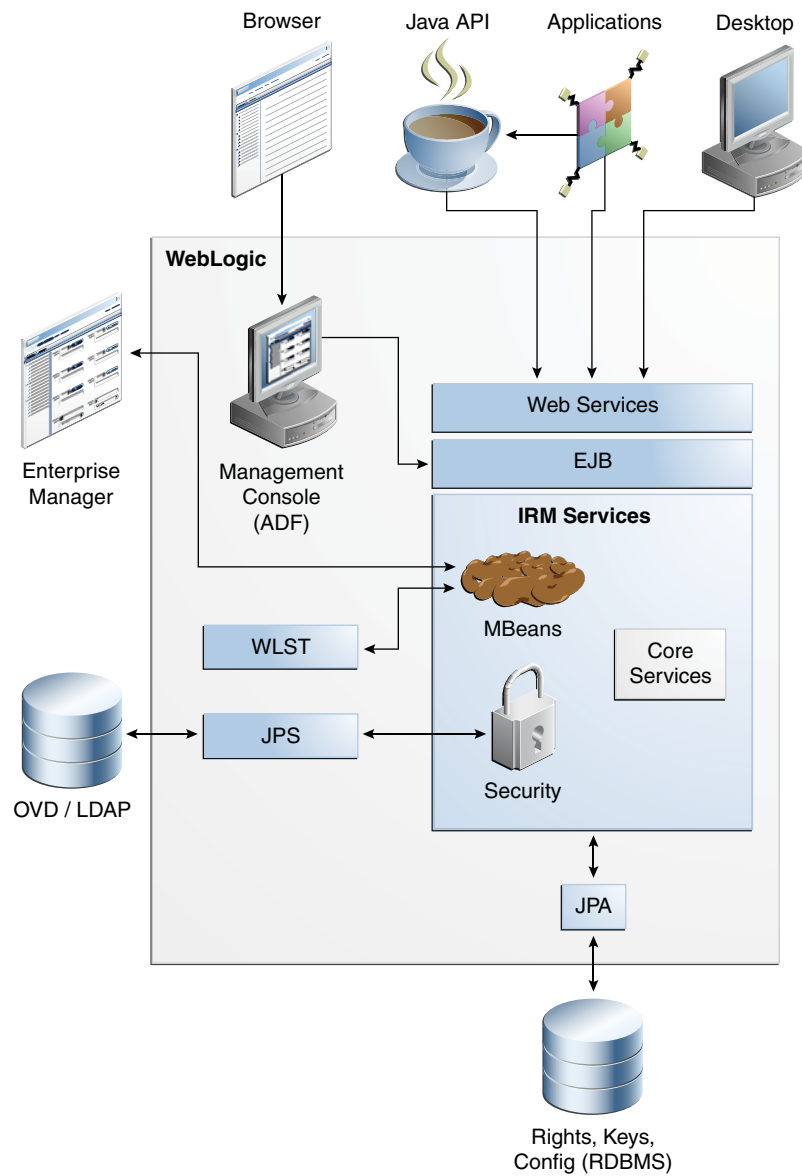


Figure 3–6 illustrates the Oracle Information Rights Management 11g as a Java EE application, running on Oracle WebLogic Server:

Figure 3–6 Oracle Information Rights Management Server 11g Running on Oracle WebLogic Server



3.7 Additional Resources

Table 3–1 lists other Oracle WebCenter Content component documentation.

Table 3–1 Additional Information for Oracle WebCenter Content Components

Component	Location of Information
Oracle WebCenter Content	<i>Oracle WebCenter Content Installation Guide</i> <i>Oracle WebCenter Content System Administrator's Guide for Content Server</i> <i>Oracle WebCenter Content Developer's Guide for Content Server</i> <i>Oracle WebCenter Content User's Guide for Content Server</i> <i>Oracle WebCenter Content Services Reference Guide</i> <i>Oracle WebCenter Content Idoc Script Reference Guide</i> <i>Oracle WebCenter Content Administrator's Guide for Conversion</i>
Oracle WebCenter Content: Records	<i>Oracle WebCenter Content Administrator's Guide for Records</i> <i>Oracle WebCenter Content Setup Guide for Records</i> <i>Oracle Fusion Middleware Enterprise Deployment Guide for Oracle WebCenter</i> <i>Oracle WebCenter Content User's Guide for Records</i>
Oracle Information Rights Management	<i>Oracle Fusion Middleware Developer's Guide for Oracle IRM Server</i> <i>Oracle Fusion Middleware Web User Interface Developer's Guide for Oracle Application Development Framework</i> <i>Oracle Fusion Middleware Administrator's Guide for Oracle IRM Server</i>
Oracle WebCenter Content: Imaging	<i>Oracle WebCenter Content Developer's Guide for Imaging</i> <i>Oracle WebCenter Content Administrator's Guide for Imaging</i> <i>Oracle WebCenter Content User's Guide for Imaging</i>
See also,	<i>Oracle WebCenter Content Installation Guide</i> <i>Oracle Fusion Middleware Enterprise Deployment Guide for WebCenter Content</i>

Upgrading Your Oracle WebCenter Content Environment

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

This chapter contains the following sections:

- Section 4.1, "Task 1: Understanding the Starting Points for Oracle WebCenter Content Upgrade"
- Section 4.2, "Task 2: Deciding Upon an Oracle WebCenter Content Topology"
- Section 4.3, "Task 3: Install Oracle Fusion Middleware"
- Section 4.4, "Task 4: Running the Upgrade Assistant to Upgrade the Oracle WebCenter Content Schema"
- Section 4.5, "Task 5: Configuring the Oracle WebCenter Content Domain"
- Section 4.6, "Task 6: Using the Upgrade Assistant to Upgrade the Oracle WebCenter Content Middle Tier"
- Section 4.7, "Task 7: Performing Any Required Post-Upgrade Configuration Tasks"
- Section 4.8, "Task 8: Verifying the Oracle WebCenter Content Upgrade"

4.1 Task 1: Understanding the Starting Points for Oracle WebCenter Content Upgrade

For information about starting points for Oracle Universal Content Management 10g and Oracle Universal Records Management 10g, see [Chapter 2](#).

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

4.2 Task 2: Deciding Upon an Oracle WebCenter Content Topology

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

For more information about your Oracle WebCenter Content topology in an Oracle Fusion Middleware implementation, see "Understanding Oracle Fusion Middleware Concepts" in the *Oracle Fusion Middleware Administrator's Guide* or "Topology Summary for Oracle WebCenter Content" in the *Oracle WebCenter Content Installation Guide*.

4.3 Task 3: Install Oracle Fusion Middleware

Before you upgrade to Oracle WebCenter Content 11g, you must install and configure an Oracle Fusion Middleware environment. Do the following:

- [Task 3a: Installing Oracle WebLogic Server Software and Creating the Middleware Home](#)
- [Task 3b: Installing Oracle WebCenter Content 11g Release 1 \(11.1.1.7.0\)](#)

Note: 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, see "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: Installing Oracle WebLogic Server Software and Creating the Middleware Home

For information about installing the Oracle WebLogic Server, see "Preparing for Installation" and "Running the Installation Program in Graphical Mode" in the *Oracle Fusion Middleware Installation Guide for Oracle WebLogic Server*.

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

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

4.3.2 Task 3b: Installing Oracle WebCenter Content 11g Release 1 (11.1.1.7.0)

For information about installing Oracle WebCenter Content 11g Release 1 (11.1.1.7.0), see the *Oracle WebCenter Content Installation Guide*.

Notes:

- Do not configure the Oracle WebCenter Content domain during the installation process.
 - Use the Oracle Universal Installer to install and configure Oracle WebCenter Content or Oracle WebCenter Content: Records 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.
-

4.4 Task 4: Running the Upgrade Assistant to Upgrade the Oracle WebCenter Content Schema

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

Notes:

- Oracle recommends performing a full backup of your Oracle Universal Content Management or Oracle URM database schema and file system before starting the upgrade.
 - Before upgrading the database schema, shut down the 10g Content Server, Administration Server, and Web Server.
-

1. Go to the `ECM_HOME/bin` directory of the Oracle Fusion Middleware installation.
2. Run the following command to start the Upgrade Assistant.

On UNIX:

```
./ua
```

On Windows:

```
ua.bat
```

The Upgrade Assistant displays the Welcome screen.

Table 4–1 Running the Upgrade Assistant to Upgrade the Oracle ECM Schema

Step	Screen	Description and Action Required
1	Upgrade Assistant Welcome Screen for Oracle Universal Content Management Schema Upgrade	Click Next to continue.
2	Upgrade Assistant Specify Operation Screen for Oracle Universal Content Management Schema Upgrade	Click Next to continue.
3	Upgrade Assistant Prerequisites Screen for Oracle Universal Content Management Schema Upgrade	<p>Select the Database backup completed and Database version Certified options.</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 whether your repositories have been backed up. So, this option serves as a reminder.</p> <p>Database version certified - 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:</p> <p>http://www.oracle.com/technology/software/products/ias/files/fusion_certification.html</p> <p>Click Next to continue.</p>
4	Upgrade Assistant Specify Source Directory Screen for Oracle Universal Content Management Schema Upgrade	<p>Enter the path to the directory containing the server's <code>intradoc.cfg</code> file.</p> <p>You can use Browse to locate this directory.</p> <p>This is not the <code>10g IntradocDir</code> but the directory containing the <code>intradoc.cfg</code> file, which describes the location of the <code>10g IntradocDir</code>. For example,</p> <p><code>IntradocDir/bin</code>.</p> <p>Click Next to continue.</p>
5	Upgrade Assistant Specify Source Database Screen for Oracle Universal Content Management Schema Upgrade	<p>Enter the following:</p> <ul style="list-style-type: none"> ■ Database Type: Select the appropriate database type. Supported database types: <ul style="list-style-type: none"> ■ Oracle ■ Microsoft SQL Server ■ DB2 ■ Connect String: Specify 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 ■ Source schema: Specify the name of the existing <code>10g schema/database/user</code>. For example, <code>DEV_OCSERVER</code>. ■ Password: Specify the password associated with the specified source schema. ■ DBA Username: To log in as the Oracle SYS database account, specify <code>SYS AS SYSDBA</code> in this field. ■ DBA Password: Specify the password associated with the specified DBA username. <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
6	Upgrade Assistant Examining Components Screen for Oracle Universal Content Management Schema Upgrade	The Upgrade Assistant examines the schema and initializes the Oracle Enterprise Content Management Suite component database plugin. Under the Status column, the word succeeded should appear. If instead, the word failed appears, inspect the log file for details. Click Next to continue.
7	Upgrade Assistant Upgrade Summary Screen for Oracle Universal Content Management Schema Upgrade	Click Upgrade .
8	Upgrade Assistant Upgrading Components Screen for Oracle Universal Content Management Schema 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: On UNIX: <i>ECM_ORACLE_HOME/upgrade/logs/uatimestamp.log</i> On Windows: <i>ECM_ORACLE_HOME\upgrade\logs\uatimestamp.log</i> In this command, <i>timestamp</i> is the current date and time. Click Next to continue.
9	Upgrade Assistant Upgrade Complete Screen for Oracle Universal Content Management Schema Upgrade	Click Close .

4.5 Task 5: Configuring the Oracle WebCenter Content Domain

Use the Fusion Middleware Configuration Wizard to configure your new Oracle WebCenter Content or Oracle WebCenter Content: Records 11g WebLogic domain.

When you configure Oracle WebCenter Content 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 WebCenter Content contains the Administration Server and one or more Managed Servers, each hosting an Oracle WebCenter Content application.

For more information about running the Configuration Wizard to configure your domain, see "Creating an Oracle WebLogic Server Domain" in the *Oracle WebCenter Content Installation Guide*.

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, "Starting the Administration Server" of the *Oracle WebCenter Content Installation Guide*.

Oracle Universal Content Management DB2 Connection Pool Settings

If you are upgrading from Oracle Universal Records Management 10g to Oracle WebCenter Content: Records 11g with a DB2 database, you must also set the following configuration variables to the connection pool of the Oracle Universal Records Management datasource. After you configure your Oracle WebCenter Content 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: Using the Upgrade Assistant to Upgrade the Oracle WebCenter Content Middle Tier

Run Upgrade Assistant again to upgrade the Oracle WebCenter Content middle tier.

To start the Upgrade Assistant using the graphical user interface:

1. Go to the `ECM_HOME/bin` directory of the Oracle Fusion Middleware installation.
2. Run the following command to start the Upgrade Assistant.

On UNIX:

```
./ua
```

On Windows:

```
ua.bat
```

The Upgrade Assistant displays the Welcome screen.

Table 4–2 Running the Upgrade Assistant to Upgrade the Oracle ECM Middle Tier

Step	Screen	Description and Action Required
1	Upgrade Assistant Welcome Screen for Oracle Universal Content Management Middle Tier Upgrade	Click Next to continue.
2	Upgrade Assistant Specify Operation Screen for Oracle Universal Content Management Middle Tier Upgrade	Middle Tier Click Next to continue.
3	Upgrade Assistant Specify Source Directory Screen for Oracle Universal Content Management Middle Tier Upgrade	Specify the complete path to the directory containing this server's <code>intradoc.cfg</code> file. You can use the Browse button to locate this directory. This is not the 10g <code>IntradocDir</code> , but the directory containing the <code>intradoc.cfg</code> file, which describes the location of the 10g <code>IntradocDir</code> . For example, <code>IntradocDir/bin</code> . Click Next to continue.
4	Upgrade Assistant Specify Destination Directory Screen for Oracle UCM Middle Tier Upgrade	Specify the complete path to your 11g server instance (<code>IntradocDir</code>). The 10g files are copied into this directory, which becomes the new <code>IntradocDir</code> for this instance. There is no requirement for this directory to exist prior to running the upgrade; the upgrade process creates it. If you enter the path to an existing instance, the upgrade fails. If the specified path already exists but does not have a configured UCM system in it, the upgrade process backs up all directories before overwriting them. Click Next to continue.

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

Step	Screen	Description and Action Required
5	Upgrade Assistant Specify WebLogic Server Screen for Oracle WebCenter Content Middle Tier Upgrade	<p>Enter the following:</p> <ul style="list-style-type: none"> ▪ Host: Specify the WebLogic Admin Server's hostname. For example, localhost. ▪ Port: Specify the server's port number. For example, 7001. ▪ Username: Specify the admin user name. For example, weblogic. ▪ Password: Specify the password associated with the specified administration user. <p>Click Next to continue.</p>
6	Upgrade Assistant Upgrade Summary Screen for Oracle UCM Middle Tier Upgrade	<p>You can expand the summary tree to view a detailed description of directories and files which are copied to the 11g instance.</p> <p>Click Upgrade.</p>
8	Upgrade Assistant Upgrading Components Screen for Oracle UCM Middle Tier 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>On UNIX:</p> <p><i>ECM_ORACLE_HOME/upgrade/logs/uatimestamp.log</i></p> <p>On Windows:</p> <p><i>ECM_ORACLE_HOME\upgrade\logs\uatimestamp.log</i></p> <p>In this command, <i>timestamp</i> is the current date and time.</p> <p>Click Next to continue.</p>
9	Upgrade Assistant Upgrade Complete Screen for Oracle UCM Middle Tier Upgrade	Click Close .

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

See [Chapter 5](#) for a description of the post-upgrade tasks and considerations you might need to perform for each of the Oracle WebCenter Content components.

4.8 Task 8: Verifying the Oracle WebCenter Content Upgrade

To verify that your Oracle WebCenter Content upgrade was successful:

1. Start the middle tier that uses the schema you upgraded in [Section 4.4](#).

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 WebCenter Content components are up and running.

3. Use the Fusion Middleware Control to verify that the Oracle WebCenter Content 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 WebCenter Content Post-Upgrade Tasks and Considerations

This chapter describes post-upgrade steps required for upgrading your Oracle WebCenter Content.

This chapter contains the following sections:

- [Section 5.1, "Post-Upgrade Tasks and Considerations for Oracle WebCenter Content"](#)
- [Section 5.2, "Post-Upgrade Tasks and Considerations for Oracle WebCenter Content: Records"](#)
- [Section 5.3, "Installing Custom Components"](#)

5.1 Post-Upgrade Tasks and Considerations for Oracle WebCenter Content

You must perform the following additional post-upgrade tasks after you have completed the procedure in [Section 4.6](#):

- [Starting the Managed Servers](#)
- [Post-Upgrade Configuration Page](#)
- [OracleTextSearch with External Database or SES](#)
- [Oracle Universal Content Management and Connection Server](#)
- [Content Server User Log In and Oracle WebLogic Server](#)
- [Internal User Log In for Oracle WebCenter Content](#)
- [Customizing Properties in Previous Oracle WebCenter Content Versions](#)
- [Setting the Microsoft SQL Server Schema Name and JDBC Username](#)
- [Upgrading Inbound Refinery](#)
- [Using the Web Root as a Context Root](#)
- [Changing the Folders Configuration to Contribution Folders](#)
- [Enabling the New Storage Rules](#)
- [Configuring the dDocCreatedDate Attribute](#)

5.1.1 Starting the Managed Servers

To start the Managed Server for Oracle WebCenter Content, follow the instructions described in "Starting Managed Servers" in the *Oracle WebCenter Content Installation Guide*.

5.1.2 Post-Upgrade Configuration Page

Instead of a post-installation Content Server Configuration page, a post-upgrade Content Server Configuration page appears. For more information, see "Completing the WebCenter Content Configuration" in the *Oracle WebCenter Content Installation Guide*.

1. Under **Instance Information**, the original 10g `weblayout` and `vault` directories are shown. If you want to move these directories, specify the new locations in this form.
2. You may need to change the `HttpServerAddress` since the 11g server is running inside a WebLogic Server. 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 change. 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 build 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 you must restart the node.
5. Restart the managed servers.

5.1.3 OracleTextSearch with External Database or SES

If your Oracle Universal Content Management 10g instance has an 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.

5.1.4 Oracle Universal Content Management and Connection Server

In 10g, the Connection Server component allows registering content with a Content Server Archive and also allows publishing through the Connection Server. This component is not supported in the Oracle WebCenter Content 11g release.

The following features of Connection Server 10g are still available and are supported, as long as Connection Server 10g is supported:

- Connection Server 10g that enables publishing files from a file system to multiple file systems. This is still supported. In the future releases the same functionality will be provided by the Deployment Server.
- Connection Server 10g can still be used to crawl an 11g Site Studio Web Site. However, a new component in Oracle WebCenter Content 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: Site Studio Publisher is not the same as the Site Studio Publishing Utility 10g.

5.1.5 Content Server User Log In and Oracle WebLogic Server

Although user log in can still be created and managed on Content Server by using the User Admin applet, they are not valid for authentication purposes, unless they are also created on an Oracle WebLogic Server.

If you use an LDAP server and creates a user log in 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.

5.1.6 Internal User Log In for Oracle WebCenter Content

In the earlier versions of Oracle WebCenter Content, two types of users are defined:

- **External users:** In Oracle Universal Content Management 10g, when an external user logs in, Content Server uses the external storage mechanism to validate the log in. 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. Users can then log in to WebLogic Server just as they used to in UCM 10g. UCM username, password, saved preferences, and other information remains the same.
- **Local users:** In Oracle Universal Content Management 10g, when a local user logs in, Content Server validates the log in by comparing the hashed passwords. In Oracle WebCenter Content 11g, with Oracle WebLogic Server, until a WebLogic Server log in is created for all UCM's, local users are unable to log in. Once administrators create the WebLogic Server log in, using an external storage mechanism, or by creating accounts using Enterprise Manager, users are able to log in to WebLogic Server using their new password. The old UCM username, saved preferences, and some other information remains the same; though the password may change.

When a new WebLogic Server log in is created, the user can log in through WebLogic Server and Content Server creates a user directory for the 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, local 10g UCM user logs in to a newly created 11g WebLogic Server log in using the same username, their 10g preferences already exist and the system works as expected.

5.1.7 Customizing Properties in Previous Oracle WebCenter Content Versions

If the properties of metadata fields used by standard components are in an earlier version of Oracle WebCenter Content, those customizations may need to be re-applied after the upgrade. After upgrading, the properties resets automatically to reflect the default preferences. For example, if a field has been customized to be visible on a check-in page in an earlier version, after upgrading, that field may be invisible again because the default rules for the component are applied.

5.1.8 Setting the Microsoft SQL Server Schema Name and JDBC Username

When you upgrade Oracle Universal Content Management with a Microsoft SQL Server database, the schema name and the JDBC username must be the same. Otherwise, the schema upgrade fails.

5.1.9 Upgrading Inbound Refinery

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

5.1.10 Using the Web Root as a Context Root

After upgrading to 11g, the web root value for your 10g system is used as the context root for your 11g system.

5.1.11 Changing the Folders Configuration to Contribution Folders

Oracle WebCenter Content Server provides a hierarchical folder interface, through either the Folders or Contribution Folders feature, for organizing and managing content in the repository. You cannot have both Folders (`FrameworkFolders` component) and Contribution Folders (`Folders_g` component) enabled on a Content Server instance.

Having both features enabled is not a supported configuration because some features, including the `CoreWebdav` system component, would not work correctly with both enabled. On a production system, you need to disable the `Folders_g` component and enable the `FrameworkFolder` component for Oracle WebCenter Content.

When you upgrade 10g with `folders_g` enabled to 11g WebCenter Content, after upgrading `FrameworkFolder` is enabled.

The following `folders_g` message appears:

```
The Folders_g component is in use but is now deprecated. Folders_g is replaced with the FrameworkFolders component which implements the Folders feature. Folders_g data can be migrated to the new Folders feature. (If you wish to continue using Folders_g and not see this message, set the configuration variable DisableFoldersgDeprecationMessage=1)
```

If you did not have `folders_g` in 10 g and upgrades to 11g, you will have `FrameworkFolder` enabled after upgrading and will not receive any alert message, because only `FrameworkFolder` is enabled.

To change the Folders configuration to Contribution Folders:

1. In the Content Server **Administration** menu, click **Admin Server**.

2. On the Component Manager page, select **Folders** to display the Folders category of components.
3. Deselect the **Folders_g** component.
4. Click **Update**, and then click **OK**, when prompted, to confirm disabling the component.
5. In the first paragraph of the Component Manager page, click **advanced component manager**.
6. In the Disabled Components box on the Advanced Component Manager page, select **FrameworkFolders**, and click the **Enable** button.
7. Restart Content Server, as described in "Restarting a Managed Server" in the *Oracle WebCenter Content Installation Guide*.

5.1.12 Enabling the New Storage Rules

If you have upgraded the DefaultFileStore provider in Enterprise Content Management 10g, then after upgrading to WebCenter Content 11g, the default storage rules are not available. In Enterprise Content Management 10g, to use the file storage rules, upgrading the DefaultFileStore provider was required.

You can enable the storage rule by performing the following:

1. Open the `config.cfg` file, which is located at `intradoc dir/config`, in a text editor and edit it as: `UpdateFilestoreProvider=true`.
2. After you complete editing the `config.cfg` file, restart your server.

5.1.13 Configuring the dDocCreatedDate Attribute

After upgrading from 10g to 11g a new document attribute, `dDocCreatedDate` is introduced. The resulting attribute needs to be manually configured to support sorting from a search query.

Complete the following steps to configure it:

1. To access the running Content Server instance, start a web browser and enter the following URL: `http://managedServerHost:managedServerPort/cs`

For `managedServerHost`, specify the name of the computer that hosts the Oracle WebLogic Server Managed Server for the WebCenter Content domain where the Content Server instance is installed. For `managedServerPort`, specify the listen port number for the Oracle WebLogic Server Managed Server for the WebCenter Content domain where the Content Server instance is installed.

Log in with the administrator user name and password for Oracle WebLogic Server. The default port number for WebCenter Content with the Content Server instance is 16200. For example: `http://myHost.example.com:16200/cs`

2. Expand **Administration** on the left pane and select **Admin Applets**.
3. Click **Configuration Manager**.
4. Ensure that the **Information Fields** tab is selected, and then click **Advanced Search Design**.
5. In the **Advance Search Design** window, select `dDocCreatedDate`, and click **Edit**.
6. Select the **Is sortable** option and click **OK**.

5.2 Post-Upgrade Tasks and Considerations for Oracle WebCenter Content: Records

For Oracle WebCenter Content: Records post-upgrade tasks, follow the same steps as described in [Section 5.1](#).

For more information about post-installation tasks for Oracle WebCenter Content: Records, See "Setting Up The Software" in the *Oracle WebCenter Content Setup Guide for Records*.

You must perform the following additional post-upgrade tasks after you have completed the procedure in [Section 4.6](#):

- [Starting the Managed Servers](#)
- [Post-Upgrade Configuration Page](#)
- [Oracle WebCenter Content: Records Content Basket Creation](#)
- [Oracle WebCenter Content: Records Scheduled Jobs](#)
- [Oracle WebCenter Content: Records Custom Dispositions](#)
- [Oracle PCM Customized Icons](#)
- [Oracle WebCenter Content: Records Enable Features Display](#)
- [Dropping Oracle URM 10g Tables](#)
- [Oracle WebCenter Content: Records Set Scripts Option](#)
- [Verifying the Settings for Oracle WebCenter Content: Records](#)
- [Editing the config.cfg File](#)
- [Importing Related Content Links](#)

5.2.1 Starting the Managed Servers

To start the managed server for Oracle WebCenter Content, follow the instructions described in "Starting Managed Servers" in the *Oracle WebCenter Content Installation Guide*.

5.2.2 Post-Upgrade Configuration Page

For more information, see [Post-Upgrade Configuration Page](#).

5.2.3 Oracle WebCenter Content: Records Content Basket Creation

In the earlier versions of Oracle WebCenter Content: Records, 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.

5.2.4 Oracle WebCenter Content: Records Scheduled Jobs

If any jobs were scheduled in previous versions of Oracle WebCenter Content: Records, 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.

5.2.5 Oracle WebCenter Content: Records Custom Dispositions

If custom dispositions were previously created using an earlier version of Oracle WebCenter Content: Records, 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.

5.2.6 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.

5.2.7 Oracle WebCenter Content: Records 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.

5.2.8 Dropping Oracle URM 10g Tables

When you install RM or URM, several database tables are created. When you uninstall them, those tables are not removed automatically. 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 it. So, when you attempt to reinstall RM or URM after upgrading the old tables (from 10g) conflicts with the new 11g system.

5.2.9 Oracle WebCenter Content: Records Set Scripts Option

When you create a simple profile on Oracle WebCenter Content: Records11g, the **Set Scripts** option, where you can enter pre-submit and post-submit scripts using idocscrips, which was available in 10g is no longer available.

5.2.10 Verifying the Settings for Oracle WebCenter Content: Records

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

5.2.11 Editing the config.cfg File

After upgrading to Oracle WebCenter Content: Records, you must open the `config.cfg` file, which is located at `intradoc dir/config`, in a text editor and update the `HttpRelativeWebRoot` parameter to `HttpRelativeWebRoot=/urm/`.

Note: You must enter `/urm/` as the default value. If you specify any other value, the Oracle WebCenter Content: Records server will not start.

After you complete editing the `config.cfg` file you must restart your server.

5.2.12 Importing Related Content Links

If you import an archive from a 10g version of the software to the 11g version that includes a Related Content table, the import must be done in two steps. First import the content items in an archive. Then import the Related Content table.

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 that you want to install in 11g, do the following:
 - a. Click the **advanced component manager** link under the **Component Manager** heading.
 - b. Click **Browse** in the **Install New Component** section.
 - c. Go to the `$IntradocDir/upgrade/components/` directory and select the component zip file.
 - d. Click **Install**.
 - e. Click **Continue**.
 - 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 WebCenter Content Upgrade Assistant Screens

When you are upgrading from Oracle Universal Content Management 10g or Oracle Universal Records Management 10g to Oracle Fusion Middleware 11g WebCenter Content, you can use Upgrade Assistant. The procedures for upgrading Oracle Universal Records Management and Oracle Universal Content Management using Upgrade Assistant are the same. The screens in this appendix chapter represent an example upgrade of Oracle Universal Content Management 10g.

A.1 Upgrade Assistant Screens for an Oracle Universal Content Management 10g Schema Upgrade

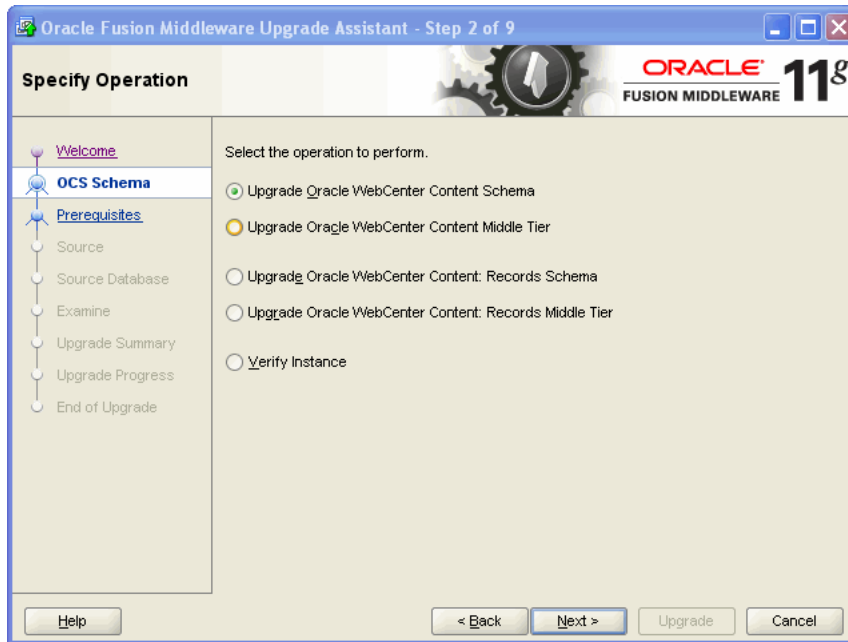
This section show the Upgrade Assistant screens for an Oracle Universal Content Management schema upgrade.

A.1.1 Upgrade Assistant Welcome Screen for Oracle Universal Content Management Schema Upgrade



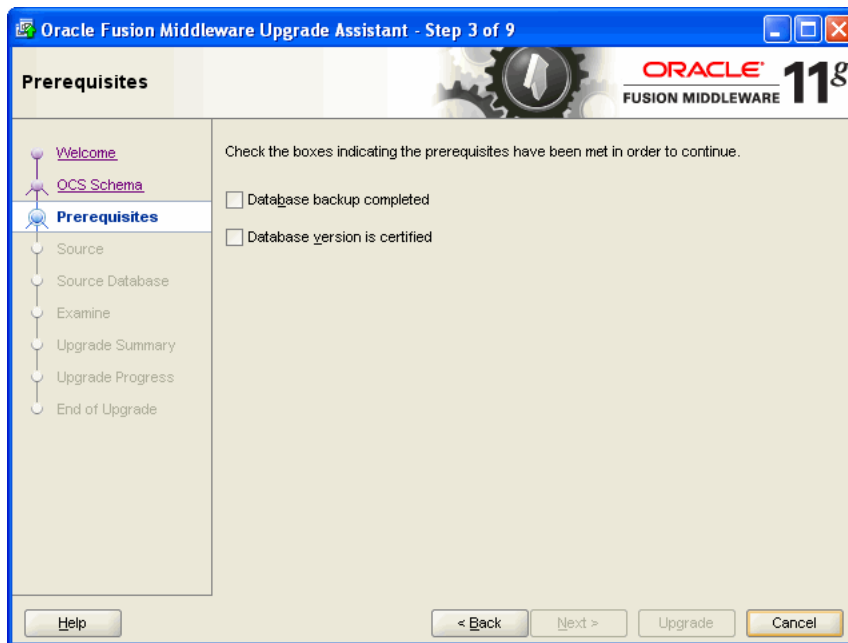
The Welcome screen is displayed each time you start an upgrade.

A.1.2 Upgrade Assistant Specify Operation Screen for Oracle Universal Content Management Schema Upgrade



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

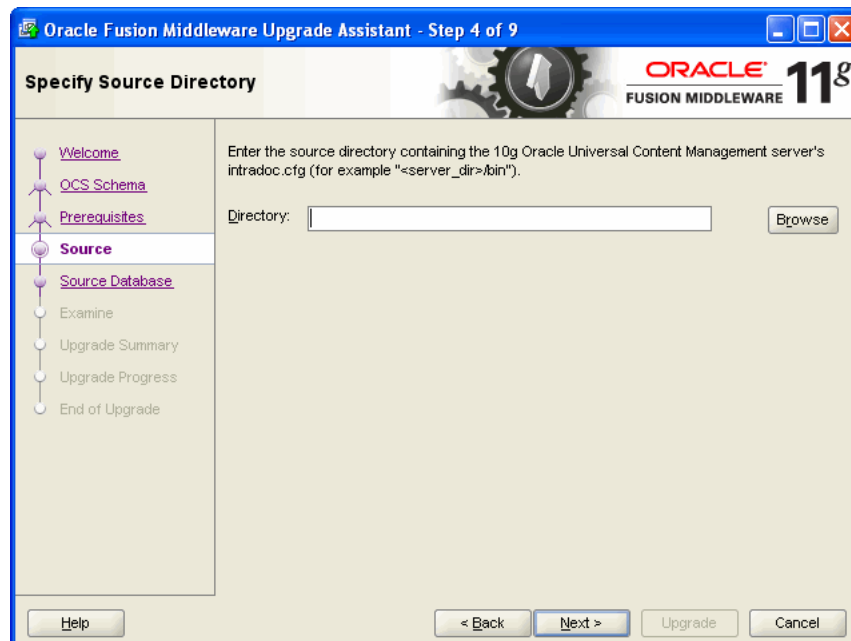
A.1.3 Upgrade Assistant Prerequisites Screen for Oracle Universal Content Management Schema Upgrade



Select the **Database schema backup completed** and **Database version is certified** 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.
Database version is certified	The Upgrade Assistant requires that the Oracle Data Integrator repositories reside on a supported database. 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 .

A.1.4 Upgrade Assistant Specify Source Directory Screen for Oracle Universal Content Management Schema Upgrade



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

Use **Browse** to locate this directory.

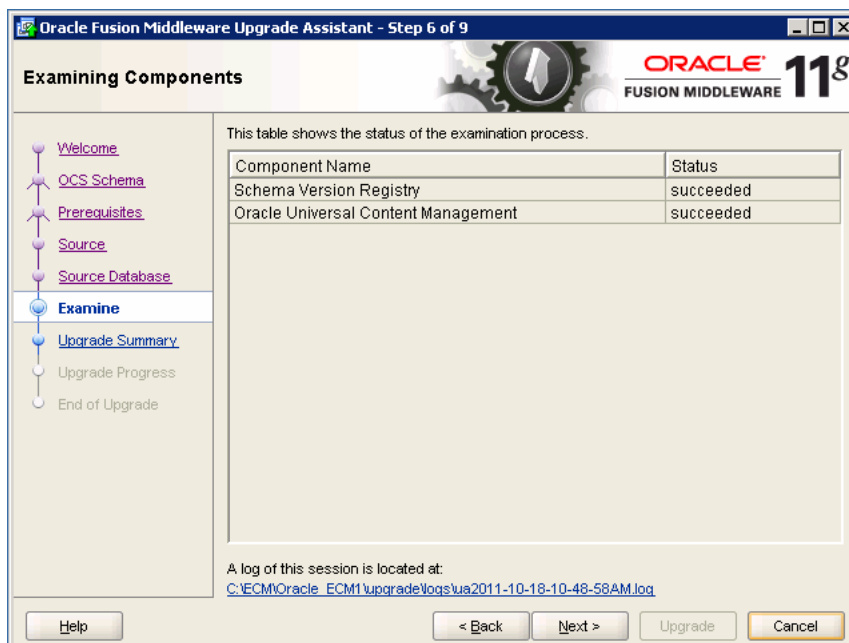
Note: This is not the 10g `IntradocDir` but the directory containing the `intradoc.cfg` file, which describes the location of the 10g `IntradocDir`.

A.1.5 Upgrade Assistant Specify Source Database Screen for Oracle Universal Content Management Schema Upgrade



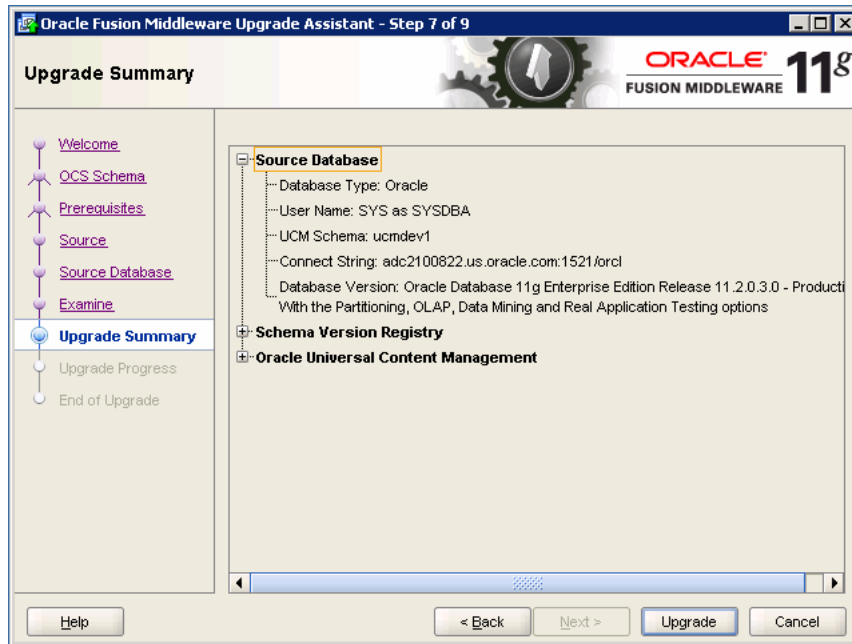
Specify Source Database screen. Click Next.

A.1.6 Upgrade Assistant Examining Components Screen for Oracle Universal Content Management Schema Upgrade



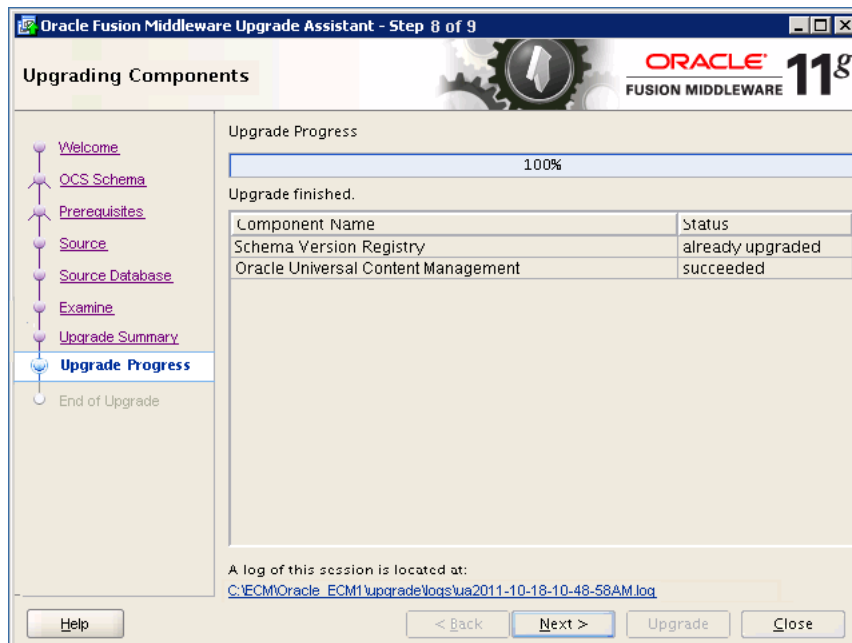
This is the Examining Components screen for a UCM schema upgrade procedure.

A.1.7 Upgrade Assistant Upgrade Summary Screen for Oracle Universal Content Management Schema Upgrade



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

A.1.8 Upgrade Assistant Upgrading Components Screen for Oracle Universal Content Management Schema Upgrade



This the Upgrading Components screen for a UCM schema upgrade.

A.1.9 Upgrade Assistant Upgrade Complete Screen for Oracle Universal Content Management Schema Upgrade

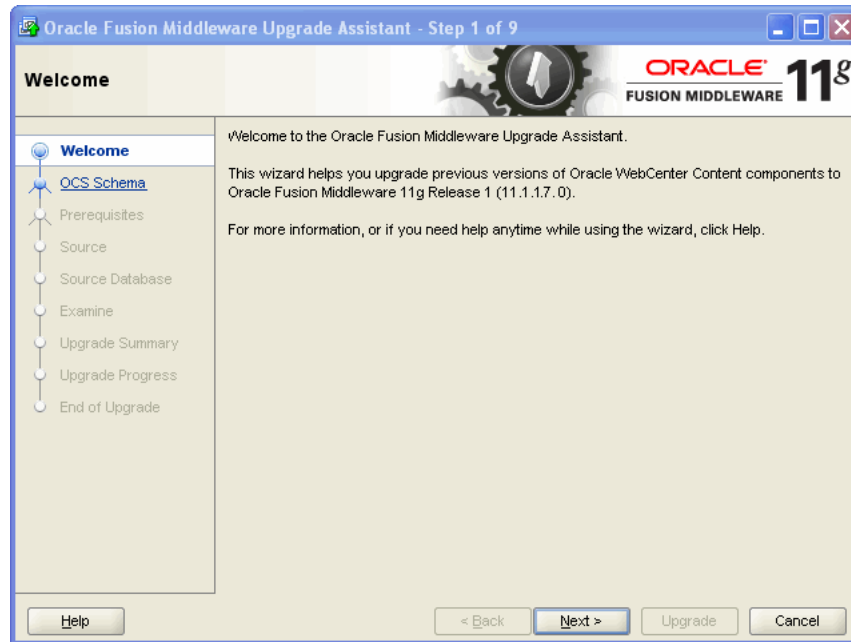


This is the Upgrading Complete screen for a UCM schema upgrade.

A.2 Upgrade Assistant Screens for an Oracle Universal Content Management 10g Middle Tier Upgrade

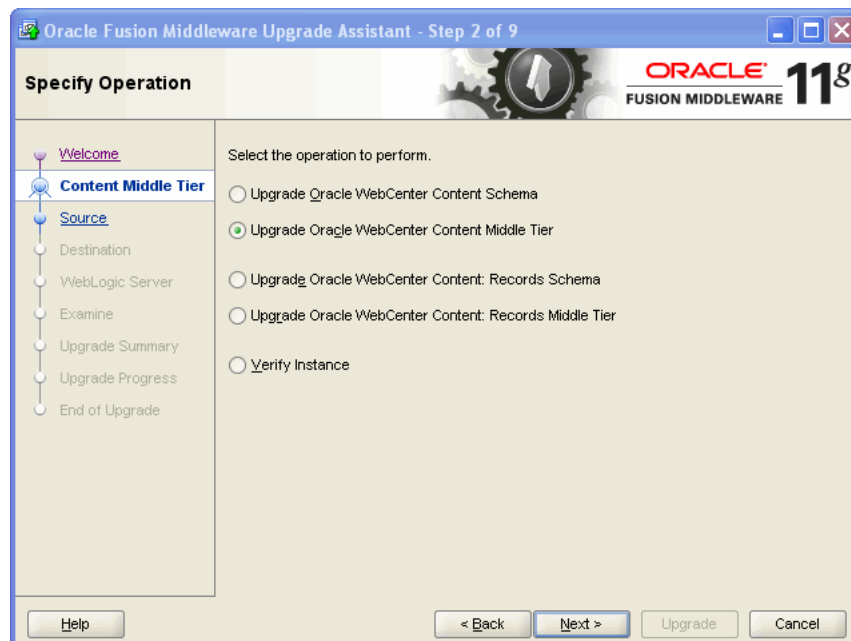
This section show the Upgrade Assistant screens for an Oracle Universal Content Management Middle Tier upgrade.

A.2.1 Upgrade Assistant Welcome Screen for Oracle Universal Content Management Middle Tier Upgrade



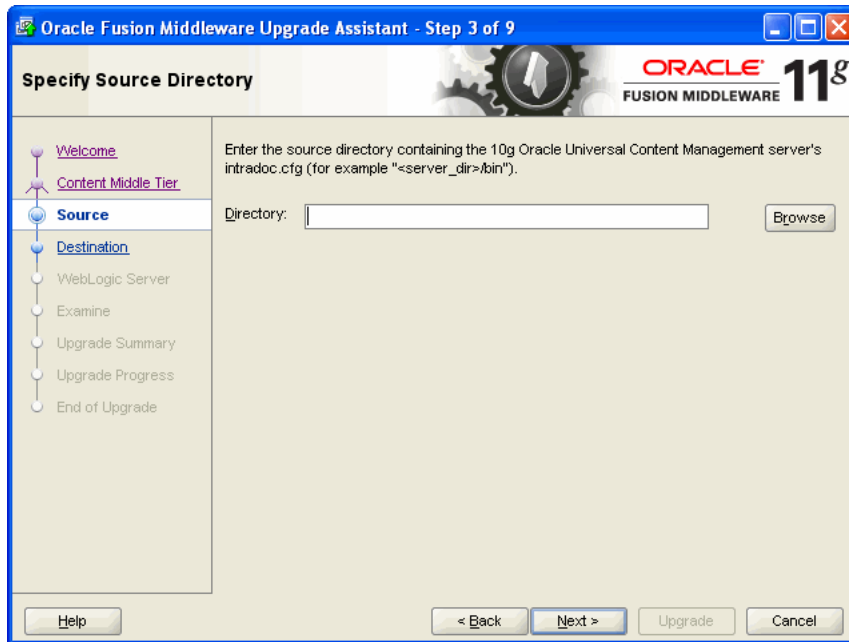
Welcome screen of Oracle Fusion Middleware Upgrade Assistant for an Oracle Universal Content Management (UCM) Middle Tier Upgrade.

A.2.2 Upgrade Assistant Specify Operation Screen for Oracle Universal Content Management Oracle Universal Content Management Middle Tier Upgrade



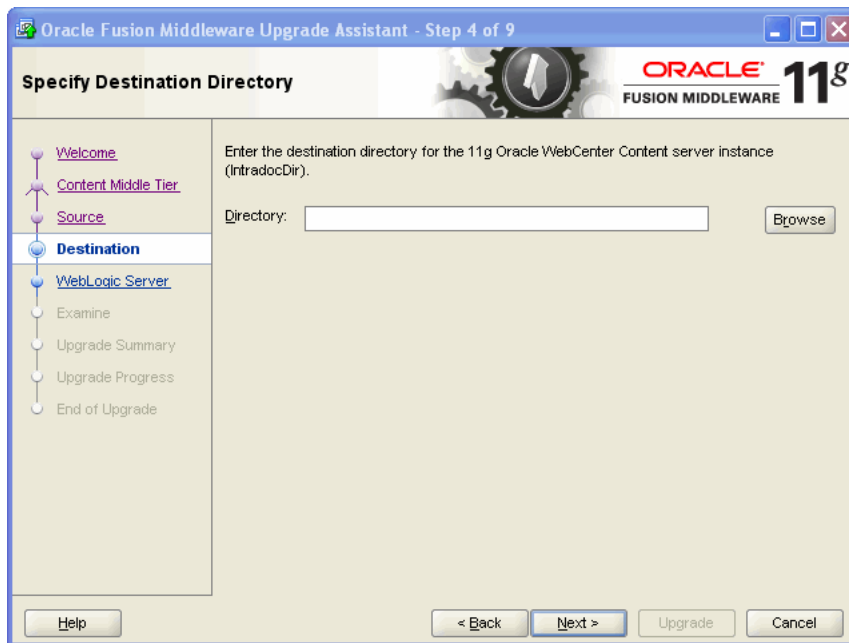
This is the Specify Operation screen for a UCM middle tier upgrade.

A.2.3 Upgrade Assistant Specify Source Directory Screen for Oracle Universal Content Management Middle Tier Upgrade



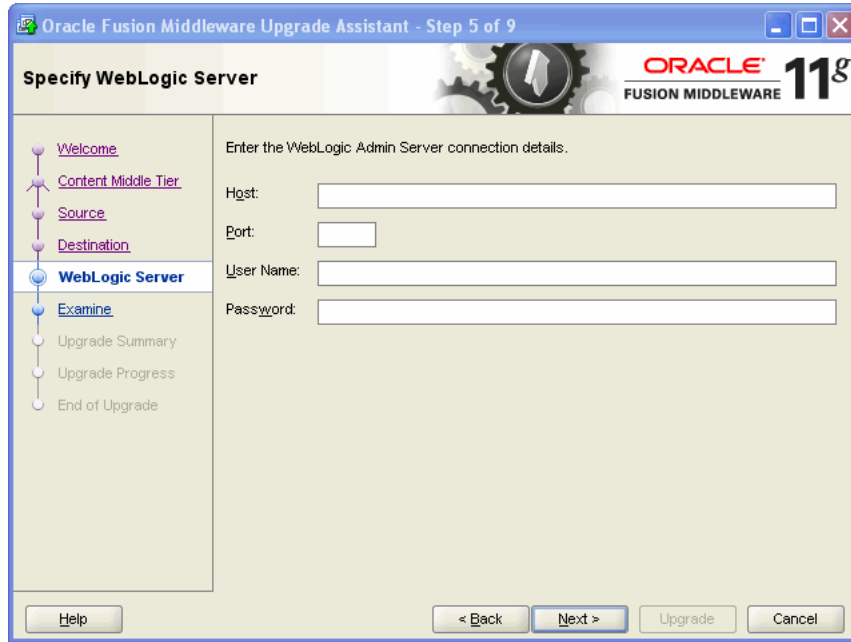
This is the Specify Source Directory screen for a Oracle UCM middle tier upgrade.

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



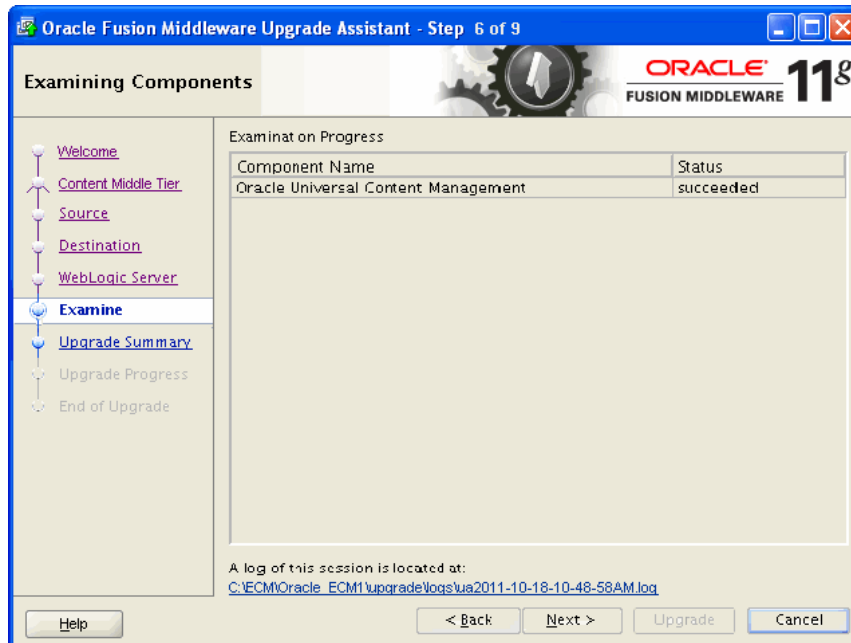
This is the Specify Destination Directory screen for a Oracle UCM middle tier upgrade.

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



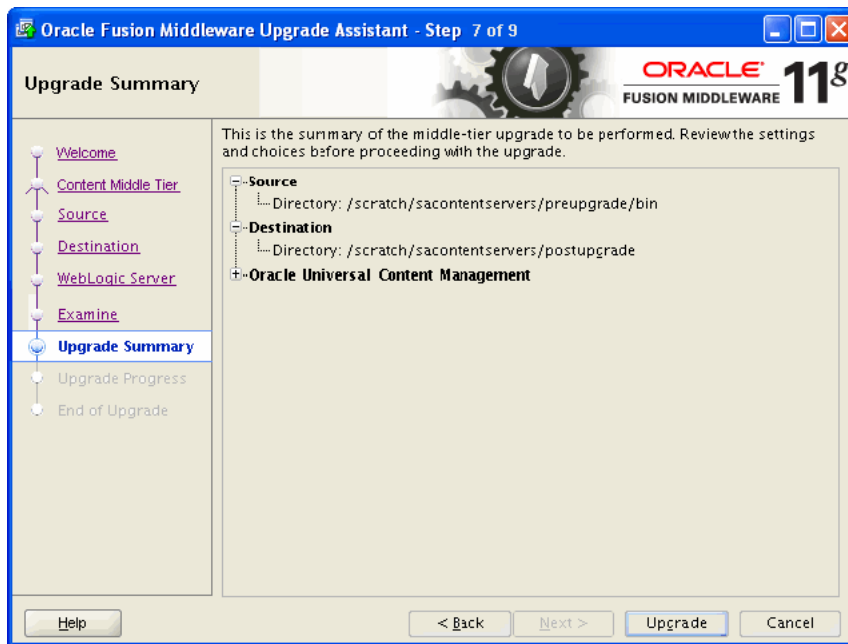
This is the Specify WebLogic Server screen for a UCM middle tier upgrade.

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



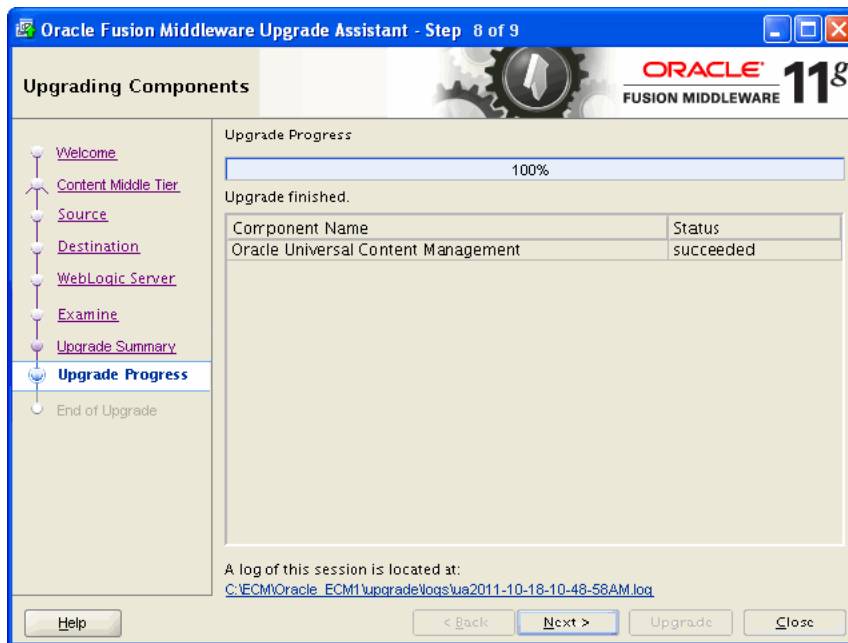
This is the Examining Components screen for a UCM Middle Tier upgrade procedure.

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



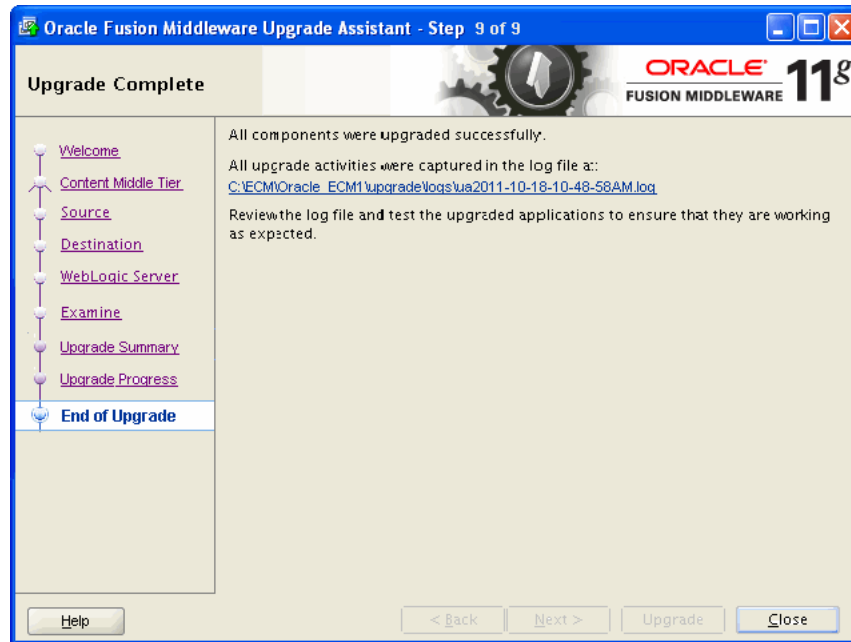
This is the Upgrade Summary screen for a UCM middle tier upgrade.

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



This is 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 Upgrade Complete screen for a UCM middle tier upgrade.

