OpenText Records Management

Installation and Administration Guide

This guide provides information about installing and administering the Records Management module.

LLESRCM100200-IGD-EN-1
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Preface

Conventions and Contacts

This preface explains the typographical conventions used in this guide and provides OpenText contact information.

Typographical Conventions Used in This Guide

All information in the following table is case-sensitive unless otherwise noted.

<table>
<thead>
<tr>
<th>Item</th>
<th>Convention</th>
</tr>
</thead>
<tbody>
<tr>
<td>File names, directory names, folder names, path names, window names, dialog box names, Web page names, URLs, and e-mail addresses</td>
<td>These items appear in regular (normal) typeface. Some elements in italic indicate placeholders.</td>
</tr>
<tr>
<td>Names of user interface elements, such as buttons, links, menus, check boxes, option buttons, lists, fields, and so on</td>
<td>These items appear in bold typeface.</td>
</tr>
<tr>
<td>Variable placeholders, references to other documents, new or special terminology, and emphasis</td>
<td>These items appear in italic typeface.</td>
</tr>
<tr>
<td>References to chapters and sections of documents, and citations of messages displayed to users</td>
<td>These items appear in “quotation marks.”</td>
</tr>
<tr>
<td>Operating system commands, code examples, feature names, method names, object names, and text typed by users</td>
<td>These items appear in a monospaced font.</td>
</tr>
<tr>
<td>Key names</td>
<td>Key names appear in ALL CAPS.</td>
</tr>
</tbody>
</table>

Contact Information

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The Knowledge Center is a source of up-to-date information, including technical hints, frequently asked questions, latest Release Notes, and more. Depending on your role, you have access to different scopes of information. The following information is available:

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• Downloads and patches.
• Documentation.
• Product information.
• Discussions.
• Product previews.

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You can access OpenText Online at http://online.opentext.com/

You can find support information at http://support.opentext.com/

If you have any comments, questions, or suggestions to improve our documentation, contact us by email at documentation@opentext.com.
Chapter 1

Installing or Upgrading the Records Management Module

Records Management is an optional Content Server module that enables use of Records Management functionality within Content Server.

The Records Management module provides the ability to create RM Classifications, Disposition searches, Holds, Reports, and Record Series Identifiers (RSIs) with Disposition schedules, and to perform administrative tasks, such as maintaining database tables.

This chapter covers the following topics:

- “Verifying Installation Requirements” on page 7
- “Installing the Records Management Module” on page 7
- “Upgrading the Records Management Module” on page 8
- “Uninstalling Records Management” on page 8

1.1 Verifying Installation Requirements

The following software must be available on the computer on which you want to install the Records Management 10.2.0 module:

- Content Server 10.0.0
- Classifications 10.2.0

Before you install the Records Management module, you must also ensure that you have administrative access to Content Server.

1.2 Installing the Records Management Module

You install the Records Management module the same way that you install most other optional Content Server modules. To install the module, you run a .exe file or extract a .tar file (depending on the operating system you are running) to unpack the installation files in Content Server's staging directory, and then add the module to Content Server using the Install Modules page. The Records Management module .exe and .tar files accompany this installation and administration guide on the OpenText Knowledge Center. For specific information about the installation process in Windows or UNIX environments, see section 27.1 "Installing and Uninstalling a Module" in OpenText Content Server Admin Online Help - Content Server Administration (LLESWBA-H-AGD), or see section 6.3 "Installing Optional
Content Server Modules: Stage 1” in OpenText Content Server - Installation Guide (LLESCOR-IGD).

After you install the Records Management module, you must configure it. For more information, see “Administering the Records Management Module” on page 9.

1.3 Upgrading the Records Management Module

You upgrade the Records Management module the same way that you upgrade most other optional Content Server modules. The process is similar to the installation process, except that you use the Upgrade Modules page to add the module. For specific information about the upgrade process in Windows or UNIX environments, see section 27.2 "Upgrading a Module" in OpenText Content Server Admin Online Help - Content Server Administration (LLESWBA-H-AGD).

Note: Before upgrading the Records Management module, you must ensure that all Records Management patch files have been removed from the patch directory. Please contact OpenText Customer Support if you have any questions or concerns.

1.4 Uninstalling Records Management

You uninstall the Records Management module the same way that you uninstall most other optional Content Server modules. For specific information about uninstalling in Windows or UNIX environments, see section 27.1.4 "To Uninstall a Module" in OpenText Content Server Admin Online Help - Content Server Administration (LLESWBA-H-AGD), or see section 9.3 "Uninstalling Modules" in OpenText Content Server - Installation Guide (LLESCOR-IGD).

Uninstalling the Records Management module will remove all Records Management metadata from your system.
Chapter 2

Administering the Records Management Module

Records Management lets you configure Records Management settings.

Note: Several Records Management administration tasks are accessible from the Records Management Workspace. For more information, see Administering Records Management in the Records Management User Online Help.

This chapter covers the following topics:

- “Working with Object Types” on page 9
- “Configuring Settings” on page 10
- “Configuring Records Management and Physical Objects Functions” on page 13
- “Modifying Ownership” on page 13
- “Managing Records Management Objects” on page 14
- “Understanding the Deletion Process in Records Management” on page 16

2.1 Working with Object Types

Records Management supports the management of the following object types and their associated subtype codes:

- Folder (0)
- Document (144)
- Text Document (145)
- Compound Document (136)
- Generation (2)
- EL Compound Document (826)
- EL Folder (823)
- EL Item (824)

If you also have the Physical Objects module installed, the management of the following object types and their associated subtype codes is also supported:

- Physical Item (411)
- Physical Item Container (412)
- Physical Item Copy (419)
Chapter 2   Administering the Records Management Module

- Physical Item Box (424)

If you have a Content Server E-mail solution, the management of the following object types and their associated subtype codes is supported:

- Compound E-mail (557)
- E-mail Item (749)
- E-mail Folder (751)

Note: Any object type and associated subtype code not included in the list above, or any custom object types, may cause undesired behavior in Records Management.

2.2 Configuring Settings

You can configure Records Management, default Classifications, and disposition settings.

2.2.1 Records Management Settings

The following tables describe the available Records Management configuration settings.

Table 2-1: Records Management Settings

<table>
<thead>
<tr>
<th>Setting</th>
<th>This setting allows you to...</th>
<th>Additional Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Records Management Group</td>
<td>Assign a group to the Records Management group. Users in this group are able to perform additional Records Management activities, such as updating Records Detail information, even when they have insufficient permissions, such as See Contents.</td>
<td>In order to perform Records Management related functions, users in this group must have the See Contents permissions to the Records Management workspace and the objects in the workspace, as well as the Classifications workspace.</td>
</tr>
<tr>
<td>Copy Function</td>
<td>Prevent Content Server Objects from being copied.</td>
<td>When you change this parameter, you must restart the Content Server and Web Application server.</td>
</tr>
<tr>
<td>See and See Contents Permision</td>
<td>Make the See and See Contents permissions modifiable for public access. If this option is not enabled, the See and See Contents permissions cannot be modified for public access.</td>
<td>When you change this parameter, you must restart the Content Server and Web Application server.</td>
</tr>
</tbody>
</table>
2.2 Configuring Settings

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Permissions Override</td>
<td>Override the default permissions for Projects.</td>
</tr>
<tr>
<td>Move Permissions</td>
<td>Specify whether objects that are moved inherit permissions from new parent objects.</td>
</tr>
<tr>
<td>Make Confidential</td>
<td>Use of confidential functions. You can also choose whether the Remove Confidential function should assign only See and See Contents permissions to Public Access.</td>
</tr>
<tr>
<td>DoD Secure Delete</td>
<td>Choose whether to enable the DoD Secure Delete function. When documents are deleted, a Secure Delete will overwrite the file seven times prior to deletion. Once this occurs, file recovery software cannot restore the file to a readable format.</td>
</tr>
<tr>
<td>Default Export Directory</td>
<td>Specify the default export directory for records and metadata when processing disposition or hold actions. If in DoD export mode, an Export log file is generated with “export_” as the pre-appended filename and does not get created in the default directory; it is created in the location: [content_server_installation_path]/logs/dispositions].</td>
</tr>
</tbody>
</table>

2.2.2 Disposition Settings

Table 2-2: Disposition Settings

<table>
<thead>
<tr>
<th>Setting</th>
<th>This setting allows you to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of items to return in a pool</td>
<td>Set the number of items to return to a pool to increase or decrease the number of items that are processed during a disposition activity. A pool is a set of items that are processed in the same queue event. By limiting the number of items that are processed at one time, the thread is free for other Content Server requests between pools.</td>
</tr>
<tr>
<td>Number of seconds between pools</td>
<td>Set the number of seconds to delay between pools to increase or decrease the length of time the disposition engine must wait before processing the next pool of items in a disposition activity.</td>
</tr>
</tbody>
</table>
Chapter 2   Administering the Records Management Module

| Number of minutes to sleep when the pool is empty | Set the number of minutes that the disposition engine must sleep when the pool is empty. |
| Breakout value                  | Set the value used during a disposition container search. When you perform a disposition container search, a node crawler will crawl through the container hierarchy to search for items of the specified object types. Once the number of crawled items exceeds the breakout value, the crawler is stopped and a standard search for the remainder of the container is performed. |

When the Records Management module is installed, an entry is placed in the [JavaModules] section of the opentext.ini file that tells the Admin Server to start the disposition engine when the Content Server service is started. Each Content Server that is part of a cluster will start a disposition engine, which allows the disposition processes to be performed on multiple servers. If you do not want a particular server in the cluster to participate in disposition activities, you can disable it by removing this entry from the opentext.ini file for that Content Server.

To modify Records Management settings:
1. On the Content Server Administration page, click the Configure Records Management link in the Records Management Administration section.
2. On the Configure Records Management page, specify any of the settings.
3. Click the Submit button.

Note: For information about specific Records Management settings, see “Records Management Settings” on page 10.

To configure Disposition settings:
1. On the Content Server Administration page, click the Disposition Settings link in the Records Management Administration section.
2. On the Disposition Settings page, specify any of the settings.
3. Click the Submit button.

Note: For information about specific disposition settings, see “Disposition Settings” on page 11.

To disable a clustered Admin Server from disposition activities:
1. Stop the Admin Server.
2. Open the opentext.ini file in a text editor.
3. In the [JavaModules] section, remove the following entry:

```java
recman=com.opentext.elf.plugin.recman.RecManPlugin
```

4. Save the opentext.ini file.

5. Start the Admin Server.

### 2.3 Configuring Records Management and Physical Objects Functions

To configure functions for Records Management and Physical Objects, you must first specify that Records Management actions should be filtered by functional access. *RM functional access* prevents users from updating specific Records Management metadata fields. Normally, users must have a minimum of the Modify Access Control permission to use these functions. You can change the settings to allow users who have only the See, See Contents permission to use these functions. Records Management functional access is assigned to individual Content Server Groups (via their Group Access settings). The list of functions will include those that have been assigned to all the groups to which you belong. The Global Functional Access Group can be used to assign specific functions to all RM users.

Even if a user already has modify permissions, you must still add the appropriate Records Management and Physical Objects functions to their group to allow them to perform these functions.


### 2.4 Modifying Ownership

You can change the ownership of Content Server objects owned by deleted or existing users.

**To change deleted user ownership:**

1. On the Content Server Administration page, click the Change Ownership link in the Records Management Administration section.
2. Click a user in the Deleted User drop-down list.
3. Search for a new owner by clicking the Find button beside the New Owner field, and then performing a search on the Select a User page.

   Optionally, select the Classification Only check box to have the change in ownership apply to only the classification.

4. Click the Submit button.
**Note:** Deleted users who have not created objects are not returned in the Deleted User drop-down list.

Changing ownership does not affect a user’s Personal Workspace.

**To change existing user ownership:**

1. On the Content Server Administration page, click the Switch Ownership link in the Records Management Administration section.

2. On the Switch Ownership page, search for the previous owner of a Content Server object by clicking the Find button beside the Previous Owner field.

   Optionally, click a month, day, and year in the corresponding drop-down lists in the Modified Date section to specify a date range for when the ownership of the Content Server object being updated was modified.

3. Search for a new owner by clicking the Find button, and then performing a search on the Select A User page.

   Optionally, select the Classification Only check box to have the change in ownership apply to only the classification.

4. Click the Submit button.

### 2.5 Managing Records Management Objects

#### Tracking Objects and Object Types

You can determine which Records Management functions are tracked for objects. You can track Classification, RSI, status, additional rights, and Record Date changes. You can also track Holds, comments for removing Holds; official marks; RSI and code management; and creation, deletion, and modification of RSI schedules and Holds.

**Note:** If you track RSI or code management, changes made to an RSI or code are saved to the audit table. Because RSIs and codes are not objects, audits are performed on the Records Management Administration and RSI containers.

#### Configuring Managed Object Parameters

You can manage object types in the Content Server database. Managing objects allows you to enable object management, enable child objects to inherit parent object classifications, ensure the downgrade of permissions if object is marked as official, choose which managed object types have titling applied when the titling feature is turned on, and set the default RM classification for a specific object type. Managed object types can have RM classifications assigned and are manageable by Records Management. You can also add object types to the Managed Objects page. This requires you to edit the opentext.ini file.
Note: You enable the titling feature on the configure Records Management page.

To set additional auditing interests:

1. On the Content Server Administration page, click the Administer Event Auditing link in the System Administration section.
2. On the Administer Event Auditing page, click the Set Auditing Interests link.
3. On the Set Auditing Interests page, select any of the check boxes for Records Management events in the Events section.
   
   Note: If you select the Manage RSI or Manage Code check boxes, changes made to an RSI or Code are saved to the audit table. Because RSIs and Codes are not objects, audits are performed on the Records Management Administration and RSI containers.
4. Click the Set Interests button.

To configure managed objects:

<table>
<thead>
<tr>
<th>To...</th>
<th>On the Content Server Administration page, click the Managed Objects link in the Records Management Administration section, and then do the following...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable object management</td>
<td>Select the Managed check box beside any of the object types, and then click the Update button.</td>
</tr>
<tr>
<td>Enable child objects to inherit parent object classifications</td>
<td>Select the Inherit from check box beside any of the container object types, and then click the Update button.</td>
</tr>
<tr>
<td>Ensure the downgrade of permissions if object is marked as official</td>
<td>Select the Downgrade Permissions check box beside any of the object types, and then click the Update button.</td>
</tr>
<tr>
<td>Enable the Titling feature</td>
<td>Select the Use Titling check box beside any object type, and then click the Update button.</td>
</tr>
<tr>
<td>Set the default RM classification for a specific object type</td>
<td>Click the Select button, browse to a classification, click the Select link for a classification, and then click the Update button.</td>
</tr>
</tbody>
</table>

Note: If you modify any of the Managed check boxes, you must restart the Content Server for the changes to take effect.

To add object types to the Managed Objects page:

1. Stop the Content Server services.
2. Open the opentext.ini file in a text editor.
3. Add a Classifications section (if one does not already exist), and then specify the item subtype codes for the objects, as follows:

```
[Classification]
SubTypes={136,144,0,411,412,419,424,557,749}
RegisteredSubTypes={199,196,551}
```

**Note:** The preceding example adds the Compound Document (136), Document (144), Text Documents (145), Folder (0), Physical Item (411), Physical Container (412), Physical Item Copy (419), Physical Item Box (424), E-mail Container (557), E-mail Node (749), and Generations (2) item object types to the Managed Objects page. OpenText has tested and approved these object types for use. All other object types have not been approved, and their use is not supported.

4. Save the opentext.ini file.

5. Start the Content Server services.

### 2.6 Understanding the Deletion Process in Records Management

If the Document Undelete module is installed, a Content Server Delete or RM Destroy moves documents to the Document Undelete workspace and the related metadata is stored in the DeletedDoc table. The deleted document remains in the Document Undelete workspace and the related metadata remains in the DeletedDoc table until the workspace and table are purged. The default auto-purge is set to seven days. For more information about auto-purging deleted objects, see “Administering Document Undelete” in the Content Server Admin online help.

**Note:** Documents and related metadata can be restored from the Document Undelete workspace and the DeleteDoc table.

If the Document Undelete module is not installed, the Document Undelete workspace and DeleteDoc table are not created. Destroyed documents are not moved to the Undelete workspace and the related metadata is not stored in the DeletedDoc table. Destroyed documents and related metadata are permanently destroyed and cannot be restored from the DeletedDoc table. Some metadata is, however, preserved by Records Management in the RM_DeleteAudit table.

**Note:** If you are using a delete workflow to delete documents in Content Server, see the Records Management Delete Workflow Tech Note for more information about the deletion process.
Chapter 3
Manually Constructing XML Classification Taxonomies

XML classification taxonomies are composed of a series of XML tags that define a hierarchy of classifications, including the names of all the classifications and their profile information. When you construct an XML classification taxonomy manually, its structure, tags, and values must meet certain requirements to import properly into Content Server. Classification hierarchies and taxonomies also apply to RM Folders, RM Parts, and Provenances.

This chapter covers the following topics:

• “Header Section” on page 17
• “Classification Hierarchy Section” on page 18
• “RM Classification Metadata Elements” on page 21
• “Example Files” on page 22
• “Location of XML DTD” on page 24

3.1 Header Section

The first part of an XML classification taxonomy is a header section that defines the XML file. This section begins with the following XML declaration, which defines the XML version and the character encoding used in the file, for example:

`<?xml version="1.0" encoding="ISO-8859-1"?>`

Next, the `importexport` start tag must appear:

`<importexport applanguage='USA' appname='contentserver' appversion='10.0.0' dtdversion='2.5' exportdate='date_and_time'>`

The following table describes the attributes of the `importexport` start tag.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>applanguage</td>
<td>The language of the application. A suggested value is USA. This attribute is optional.</td>
</tr>
<tr>
<td>appname</td>
<td>The name of the application. A suggested value is ContentServer. This attribute is required.</td>
</tr>
<tr>
<td>Attribute</td>
<td>Value</td>
</tr>
<tr>
<td>-----------</td>
<td>-------</td>
</tr>
<tr>
<td>appversion</td>
<td>The version number of the application. A suggested value is 10.2.0 This attribute is required.</td>
</tr>
<tr>
<td>dtdversion</td>
<td>The version number of the DTD that defines XML classification taxonomies. The only valid value is 2.5.</td>
</tr>
<tr>
<td>exportdate</td>
<td>The date and time that the classification structure was exported from Content Server. The format of this attribute is <a href="">yyyy-mm-ddThh:nn:ss</a> (for example, 2002-04-12T21:31:48), where &lt;yyyy&gt; is the year, &lt;mm&gt; is the month, &lt;dd&gt; is the day, &lt;hh&gt; is the hour, &lt;nn&gt; is the number of minutes, and &lt;ss&gt; is the number of seconds. This attribute is optional. When you construct an XML classification taxonomy manually, you do not need to include this attribute.</td>
</tr>
</tbody>
</table>

### 3.2 Classification Hierarchy Section

The second part of an XML classification taxonomy is the section that defines the hierarchy of classifications and their settings. This section occurs between the start and end tags of the importexport element, and consists of either classificationtree or RMClassification, which defines classifications as follows:

```xml
<classificationtree managementtype='type' name='name' selectable='boolean' subtype='subtype'>
  <query></query>
</classificationtree>
```

or

```xml
<RMClassification managementtype='type' name='name' selectable='boolean' subtype='subtype'>
  <query></query>
</RMClassification>
```

Additionally, the classification tag may appear within the classificationtree tag.

Provenances can exist inside importexport, classificationtree, and other Provenance. Provenance elements are as follows, in order:

- provtype - The Provenance type (from the Table Maintenance Codes)
- provaltname - An alternate name for the Provenance (for example, the name in French)
- provaltdesc - An alternate description (for example, the description in French)
- provtext
- provstartdate - The start date
• `provenddate` – The end date
• `Provdisableflag` – 1, if disabled; otherwise not present
• Provenance

The following table describes the query tag and the different types of classification tags.

**Table 3-2: The classification and query Tags**

<table>
<thead>
<tr>
<th>Tag</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>classification-tree</td>
<td>This tag defines a classification. Its attributes contain all the classification's settings.</td>
</tr>
<tr>
<td>classification</td>
<td></td>
</tr>
<tr>
<td>RMClassification</td>
<td></td>
</tr>
<tr>
<td>query</td>
<td>This tag defines the profile query for a classification when it has been exported from Content Server. Do not enter a value in this field.</td>
</tr>
</tbody>
</table>

The following table describes the attributes for the classification types start tags.

**Table 3-3: Attributes of the classificationtree, classification, and RMClassification Tags**

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>managementtype</td>
<td>The management type of the classification. Valid values are manual, automatic, and assisted.</td>
</tr>
</tbody>
</table>

Note: When the Classifications Professional option is enabled in the Classifications module, RM Classifications will not support the Assisted management type on the *Extras* tab of the RM Classifications.

For more information about the management type for a classification, see “Configuring a Classification” in the *Classifications online help*.

<table>
<thead>
<tr>
<th>name</th>
<th>The name of the classification. This value is a string (for example, <code>Annual Reports</code>).</th>
</tr>
</thead>
<tbody>
<tr>
<td>selectable</td>
<td>Whether or not the classification is selectable. Valid values are true and false.</td>
</tr>
</tbody>
</table>

For more information about the management type for a classification, see “Configuring a Classification” in the *Classifications online help*.

| subtype       | The subtype of the classification. Valid values are 196, 199, and 551, which correspond to Classification Tree, classification, and RM classification, respectively. This attribute is mandatory. |


<table>
<thead>
<tr>
<th>Attribute</th>
<th>Value</th>
</tr>
</thead>
</table>
| score     | Optional attribute that can appear if the management type is set to automatic or assisted Classification. **Score** is a field on the profile tab for the `<classification>`, `<classificationtree>`, and `<rmclassification>` node.

The relevance score threshold determines how closely a document must satisfy your profile parameters. The higher the threshold, the more exact the match must be. You can choose to use either the default relevance score threshold, 40, which is displayed in parentheses, or specify a custom value in the input field. If you enter a custom value, the entry must be from 1 to 100. For more information, see the *Classifications Resource Guide*.

In this section, the hierarchy of classifications is defined by embedding classification elements within other classification type elements. For example, if a classification named *Classification1* contains another classification named *Classification2*, then *Classification2* would be embedded within *Classification1* as follows:

```
<classification managementtype='manual' name='Classification1'
 selectable='true' subtype='199'>
  <query></query>
</classification>
```

There are several rules regarding how the hierarchy is defined:

- At the root level of the hierarchy, there can be only one classification type element.

- Classification type elements can contain other classification type elements, observing the following rules:
  - A `classificationtree` may not be contained within any other classification type element, including a `classificationtree`.
  - A `RMClassification` may only contain other `RMClassification` elements.

At the end of this section, you must include the end tag for the `importexport` element:

```
</importexport>
```
## 3.3 RM Classification Metadata Elements

RM classifications require additional elements that define their metadata. These elements appear between the start and end tags of the `RMClassification` element.

### Table 3-4: RM Classification Metadata Elements

<table>
<thead>
<tr>
<th>Tag</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>query</td>
<td>This tag defines the profile query for a classification when it has been exported from Content Server. Do not enter a value in this field.</td>
</tr>
<tr>
<td>rsi</td>
<td>This tag identifies the RSI that is assigned to the RM classification. If the RM classification does not require an RSI, this tag need not appear. The RSI cannot exceed 20 characters. This tag is optional.</td>
</tr>
<tr>
<td>filenumber</td>
<td>This tag identifies the unique file number assigned to the RM classification. If a tree of RM classifications is being created, the full file number is the concatenation of all the file numbers up the XML tree. The full file number cannot exceed 64 characters, including file number separators. Furthermore, the File Number must be unique at any given level. This tag is required.</td>
</tr>
<tr>
<td>filestatus</td>
<td>This tag identifies the status of the RM classification. This value cannot exceed three characters and must exist in the Status table in the Table Maintenance area of the Records Management Workspace. This tag is required.</td>
</tr>
<tr>
<td>createdate</td>
<td>This tag identifies the creation date of the RM classification. This value must be of the form <code>yyyyymmdd</code>, where <code>yyyy</code> is the four-digit year, <code>mm</code> is the two-digit month, and <code>dd</code> is the two-digit day. This tag is required.</td>
</tr>
<tr>
<td>filestatusdate</td>
<td>This tag identifies the status date of the RM classification. This value must be of the form <code>yyyyymmdd</code>, where <code>yyyy</code> is the four-digit year, <code>mm</code> is the two-digit month, and <code>dd</code> is the two-digit day. This tag is required.</td>
</tr>
<tr>
<td>essential</td>
<td>This tag identifies the Essential code assigned to the RM classification. This value cannot exceed three characters and must exist in the Essential Record table in the Table Maintenance area of the Records Management Workspace. This tag is required.</td>
</tr>
<tr>
<td>storage</td>
<td>This tag identifies the Storage Medium code assigned to the RM classification. This value cannot exceed three characters and must exist in the Storage Medium table in the Table Maintenance area of the Records Management Workspace. This tag is required.</td>
</tr>
<tr>
<td>keywords</td>
<td>An optional set of keywords that can be assigned to an RM classification. This value cannot exceed 65K characters in MSSQL Server and 2000 characters in Oracle. This tag is optional.</td>
</tr>
<tr>
<td>subject</td>
<td>An optional subject that can be assigned to an RM classification. This value cannot exceed 65K characters in MSSQL Server and 2000 characters in Oracle. This tag is optional.</td>
</tr>
<tr>
<td>dispauthority</td>
<td>An optional Disposition Authority that can be assigned to an RM classification. This value cannot exceed 64 characters. This tag is optional.</td>
</tr>
</tbody>
</table>
Tag | Description
--- | ---
cycleperiod | The optional update cycle period of the RM classification. Valid values are 1, 2, 3, and 12, which identify the number of months between review periods of RM Classified objects. If the Essential code for the RM classification is identified as a Vital Record Code (see the Records Management Administration section of the Admin pages), this tag must be populated with one of the valid values. This tag is optional.
closedflag | The optional closed flag indicator. Valid values are 0 and 1. 1 indicates that the RM classification is Closed, while a 0 indicates that the RM classification is not closed. A closed RM classification cannot be assigned to Content Server objects. If the RM classification is closed, this tag must be populated with a value of 1. This tag is optional.

### 3.4 Example Files

The following example is a single RM classification, named *Empty RMClassification*. It is non-selectable, its management type is set to manual, and some, but not all, of its optional metadata elements are present:

```xml
<?xml version="1.0" encoding="ISO-8859-1"?>
<importexport applanguage='USA' appname='contentserver' appversion='10.0.0' dtdversion='2.5'>
  <RMClassification managementtype='manual' name='New RM Classification 2' selectable='true' subtype='551'>
    <rsi>RULE 1.1</rsi>
    <filenumber>11245</filenumber>
    <filestatus>ACT</filestatus>
    <createdate>20030915</createdate>
    <filestatusdate>20030915</filestatusdate>
    <essential>NO</essential>
    <storage>PAP</storage>
    <cycleperiod>0</cycleperiod>
    <closedflag>0</closedflag>
  </RMClassification>
</importexport>
```

The following example is a more typical RM classification. The name of the primary RM classification is *Corporate Information*, and it contains three RM classifications: *About Us*, *Annual Reports*, and *News*. Inside *News*, there are two further classifications: *Press Releases* and *Newsletters*. At the root level, *Corporate Information* is non-selectable, and its management type is set to manual, while all the RM classifications it contains are selectable, with their management types set to assisted:
<?xml version="1.0" encoding="ISO-8859-1"?>
<importexport applanguage='USA' appname='Content Server'
appversion='10.0.0' dtdversion='2.5'>

<RMClassification managementtype='manual' name='Corporate Information'
selectable='false' subtype='551'>
<query></query>
<filenumber>11245</filenumber>
<filestatus>ACT</filestatus>
<createdate>20030915</createdate>
<filestatusdate>20030915</filestatusdate>
<essential>NO</essential>
<storage>PAP</storage>
<cycleperiod>0</cycleperiod>
<closedflag>0</closedflag>
</RMClassification>

<RMClassification managementtype='assisted' name='About Us'
selectable='true' subtype='551'>
<query></query>
<rsi>RULE 1.1</rsi>
<filenumber>-2212</filenumber>
<filestatus>CLO</filestatus>
<createdate>20030915</createdate>
<filestatusdate>20030915</filestatusdate>
<essential>YES</essential>
<storage>ELE</storage>
<subject>Company Annual Reports</subject>
<cycleperiod>3</cycleperiod>
<closedflag>0</closedflag>
</RMClassification>

<RMClassification managementtype='assisted' name='Annual Reports'
selectable='true' subtype='551'>
<query></query>
<rsi>RULE 1.1</rsi>
<filenumber>-2313</filenumber>
<filestatus>INA</filestatus>
<createdate>20030915</createdate>
<filestatusdate>20030915</filestatusdate>
<essential>NO</essential>
<storage>ELE</storage>
<subject>Company Annual Reports</subject>
<cycleperiod>1</cycleperiod>
</RMClassification>

<RMClassification managementtype='assisted' name='News'
selectable='true' subtype='551'>
<query></query>
<rsi>RULE 2.1</rsi>
<filenumber>-2334</filenumber>
<filestatus>ACT</filestatus>
3.5 Location of XML DTD

The XML DTD is not available at the time of installation of the Classifications module. Upon an attempt to import classifications, the DTD will be dynamically generated and placed in the \contentserverinstall\module\classification folder.