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# Enterprise Content Management 11g

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# ECM Strategy

**SOFTWARE.  
HARDWARE.  
COMPLETE.**

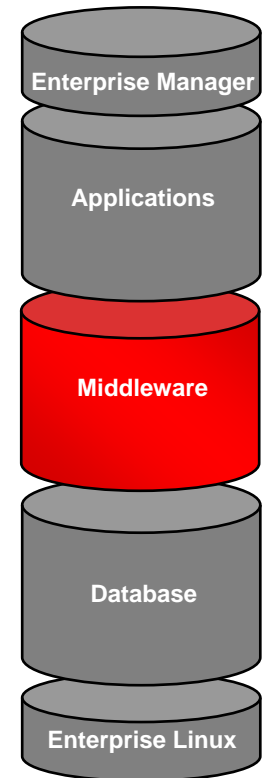
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# Oracle Content Management

## A Strategic Focus @ Oracle

- Key Component of Enterprise Software
  - Over 90,000 Oracle middleware customers
  - Over 7,900 Oracle enterprise content mgmt customers
- Content Management Critical for
  - Oracle Fusion Middleware
  - Oracle Applications & Fusion Applications
  - Blending structured & unstructured information mgmt
  - Stand-alone E2.0 & ECM business
- ECM Continued Focus Area
  - New features continually added since Stellent acquisition in 2007
  - Key new capabilities in 11g+
  - Growing R&D resources since Stellent acquisition

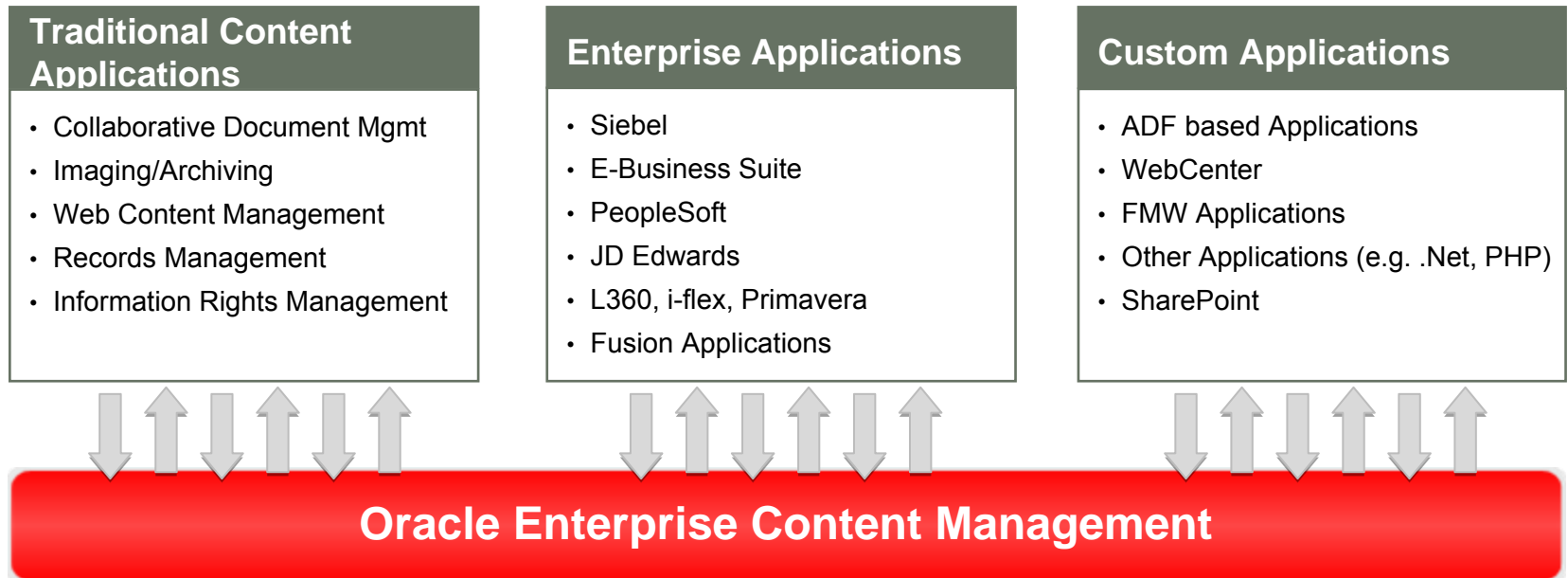
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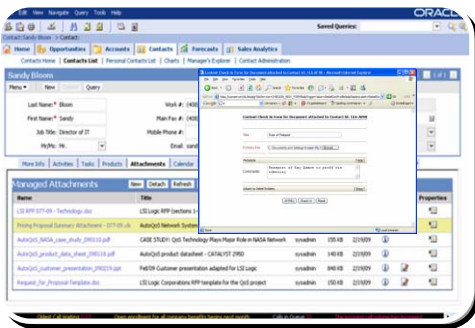
# Content Management as Infrastructure

## Content Management Strategy



# ECM for Applications Integration Strategy

- Key productized integrations available
- E-Business Suite, Siebel, PeopleSoft



- **Ad-hoc attachments**

- Replace native document stores
- Enterprise class scalability and functionality
- Application content reuse
- “Quick scan” document capture



- **High volume document processing**

- Automating paper-based processes
- Accounts payable automation, time & expense management, order management
- Provide imaging, capture, forms recognition and workflow





# 11g Highlights

**SOFTWARE.  
HARDWARE.  
COMPLETE.**

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# Oracle Content Management 11g

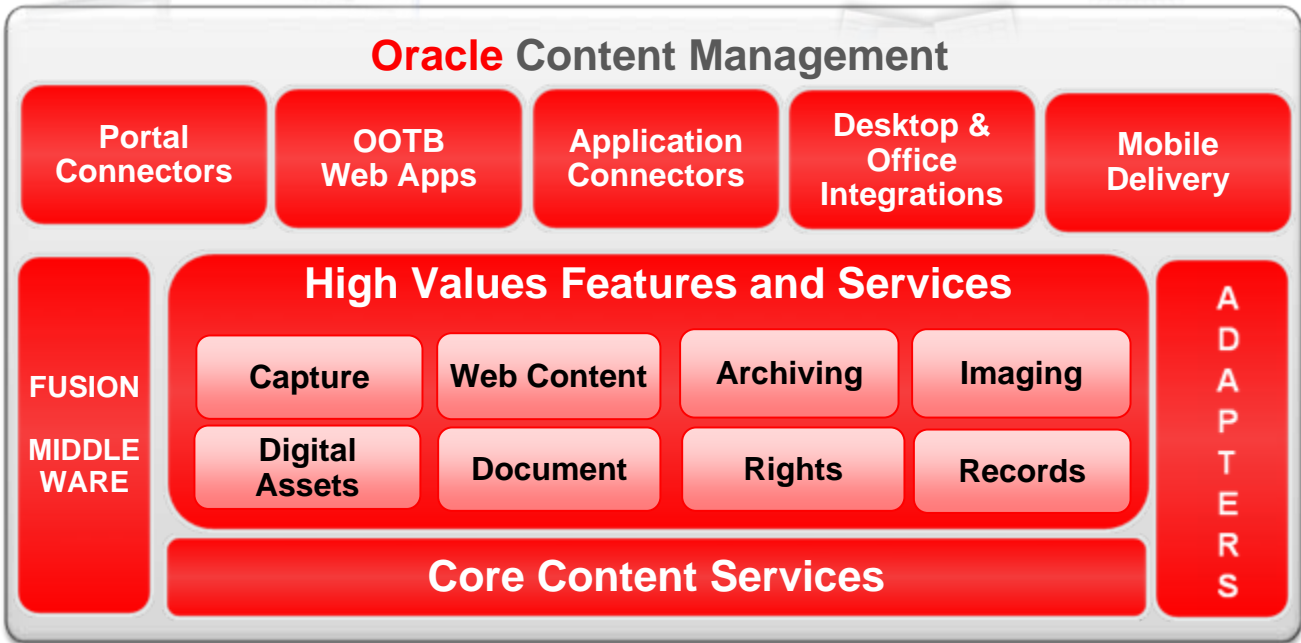


**SOA, BPM, JDev**

**Identity Mgmt**

**Business Intelligence**

**Application Grid**



**documentum**  
a division of EMC

Microsoft®  
**SharePoint**

**Notes / Domino**

**File Systems**

**3rd Party**

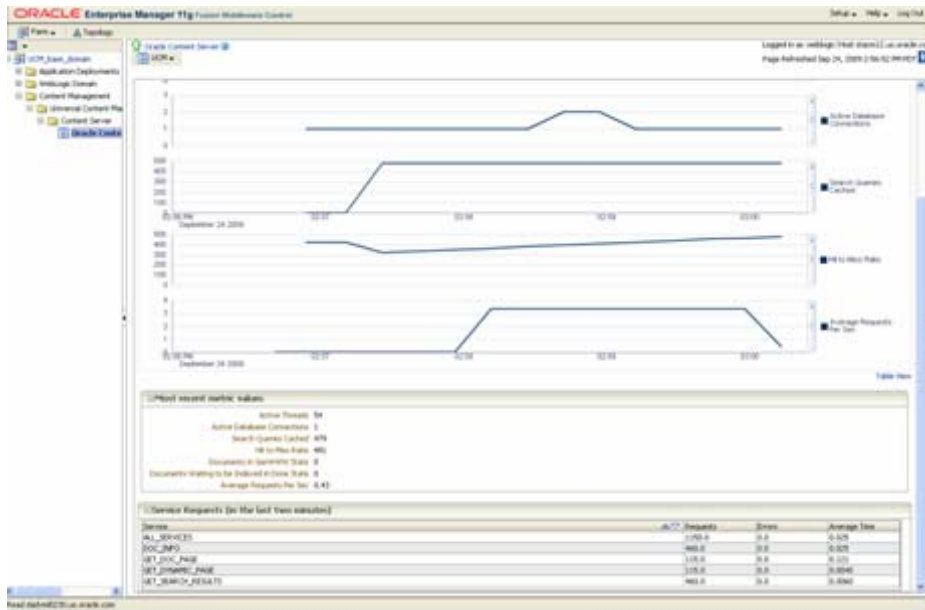
<p><b>Oracle Database</b> SecureFiles, AuditVault, Database Vault, RAC</p>	<p><b>Oracle Storage</b> Archive Manager</p>	<p><b>3rd Party</b> Database, File System</p>
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# Standard Infrastructure for ECM 11g

## Leveraging Fusion Middleware

### WebLogic Server Infrastructure

- WebLogic Server for J2EE runtime
- Across the board LDAP and OVD support
- Single Sign On integrations
- WLS infrastructure for Web Services
- User Interface based on ADF
- Globalization to 27 languages
- High availability, security, diagnostics



### Management

- Command line management with WLST
- Enterprise Manager support for
  - Server and configuration management
  - Performance management and metrics

### Oracle Universal Installer

- Standard OUI and middleware config wizard
- RCU integration for schema management

### Leveraging other FMW products

- BPM Suite, BI Publisher, RTD, SES

# Directly From Your Desktop

## New Integrations in Microsoft Office w/ Identity Tagging

The image displays a composite screenshot of Microsoft Office applications demonstrating integration with Oracle UCM. At the top, a Microsoft Word window titled "Ravenna Vendor Contract.docx" shows the "Oracle UCM" ribbon tab. The ribbon includes buttons for "Open", "Check In", "Check In With Metadata", "Save As New", "With Earlier Revision", "With Content Item", "Insert", "Edit Server List", "Help Contents", and "About UCM Desktop Integration Suite".

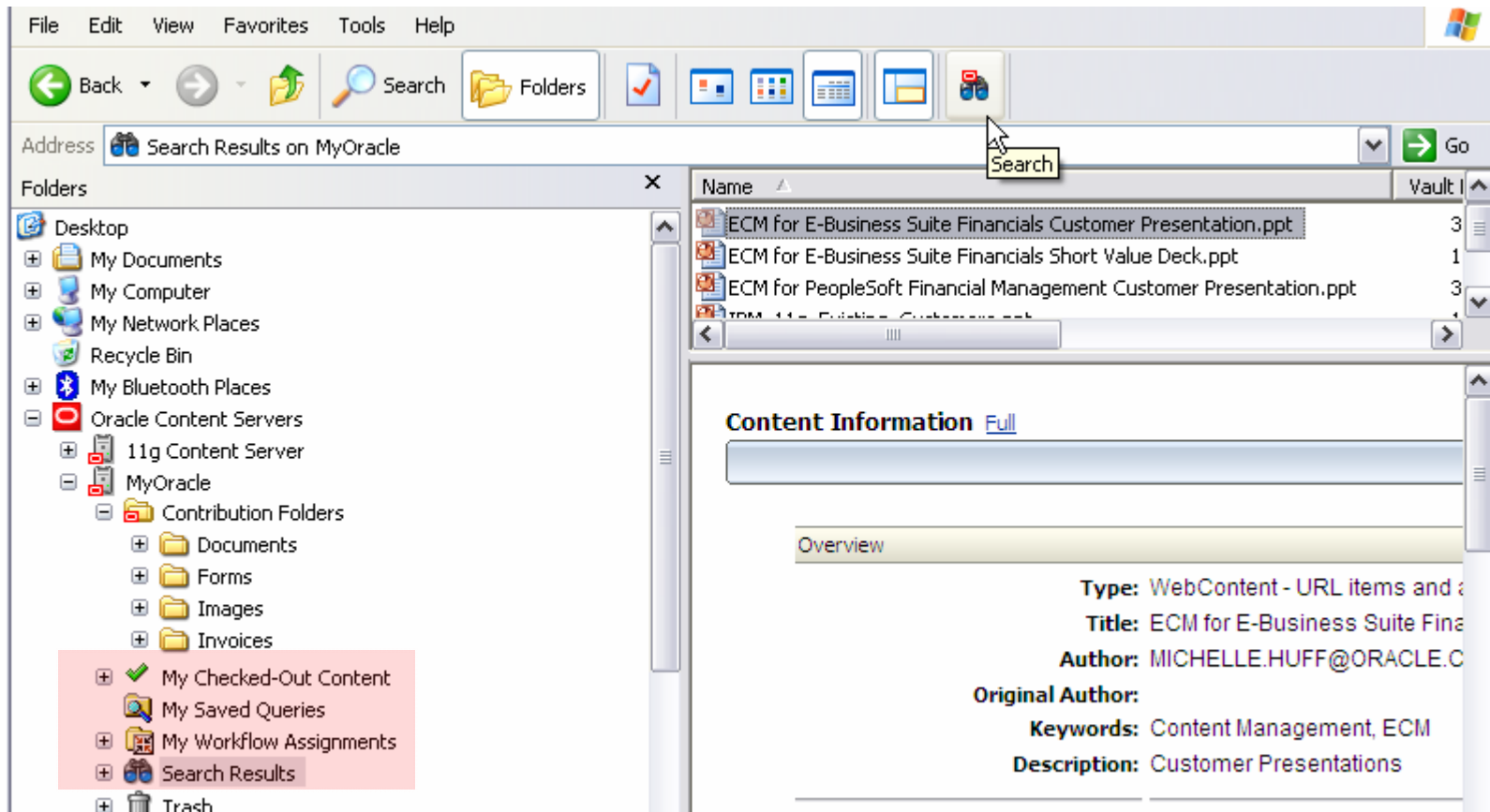
Below the Word window, a Microsoft Outlook window titled "11g ECM Launch" is visible. The "Oracle UCM" ribbon is also present in Outlook, featuring a "Check In Mail Item" button. The Outlook interface shows a "Mail" view with a "11g ECM La..." folder and a search bar. A "Check In Mail Item" button is highlighted with a mouse cursor.

In the foreground, a "Get Attachment" dialog box is open. It displays "Content Item: CNT257838" and a "Browse..." button. The "Options" section includes "Link Text: ECM for E-Business Suite Financials Customer Presentation". Under "Link to:", there are radio buttons for "Native Rendition", "Web-Viewable Rendition", "HTML Rendition", and "Content Information Page", with "Link to Latest Revision" checked. The dialog also has "Help", "OK", and "Cancel" buttons.

At the bottom, a Microsoft Word window titled "Check out the latest presentation I found! - Message" shows the "Oracle UCM" ribbon with a "Get Attachment" button highlighted by a mouse cursor. The "To:" field contains "joe.smith@company.com" and the "Subject:" field contains "Check out the latest presentation I found!".

# Directly From Your Desktop

## Windows Explorer with New Smart Productivity Folders



# Directly from Enterprise Applications

## Out of the Box Integrations w/ EBS, Siebel & PSFT

The screenshot displays the Oracle Applications interface. The main window is titled "Oracle Applications" and shows a "People" form for a person named John Abraham. The form includes fields for Name (Last: Abraham, First: John, Title: Mr.), Gender (Male), Person Types (Expatriate), and Identification (Employee: 1257). Below the name fields are tabs for Personal, Employment, Office Details, Applicant, and Background. The Personal tab is active, showing Birth Date (09-DEC-1961), Town of Birth, Region of Birth, Country of Birth, and Effective Dates (From: 25-FEB-1999). A "Managed Attachments" window is overlaid on the right, showing a table of attachments for John Abraham.

Name	Title	Author	Size	Date	Info	Edit	Properties
<a href="#">JP-H-2181_Comms_Manager.doc</a>	Job Profile - Communical	kevind	24 KB	8/16/09			
<a href="#">passport.jpg</a>	Copy of Passport	kevind	525 KB	8/14/09			
<a href="#">Belgium Ltr of support-Oracle.doc</a>	Visa Application support	kevind	33 KB	8/14/09			

Record: 1/1

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# Directly from Custom Web Applications

## Add 1-Click Web Content Mgmt to New & Existing

The diagram illustrates the process of adding 1-click web content management to a custom web application. It shows three main components:

- Placeholder View (Left):** A screenshot of a web application titled "Medical Records" with a "Patient Info" header. Below the header, there is a placeholder for content labeled "content\_body\_pl". Below this is a "Visits" table.
- Rendered View (Right):** The same web application after content management. The placeholder is replaced by a "Welcome to Your Personal Health Record Center" message, a paragraph of text, "Health Headlines" with three links, and the "Visits" table.
- Editor View (Bottom):** A screenshot of the Oracle Site Studio Contributor interface. It shows the "Welcome to Your Personal Health Record Center" content being edited. The interface includes a toolbar with various editing tools and a preview window showing the rendered content.

**Visits Table (Left):**

Date	Reason for Visit	Physician
07/05/1999	Twisted knee while playing soccer.	Dr. Phil B Lance
05/30/1993	Sneezing, coughing, stuffy head.	Dr. Kathy
05/18/1999	Complains about chest pain.	Dr. Phil E

**Visits Table (Right):**

Date	Reason for Visit	Physician
07/05/1999	Twisted knee while playing soccer.	Dr. Phil B Lance
05/30/1993	Sneezing, coughing, stuffy head.	Dr. Kathy E Wilson
05/18/1999	Complains about chest pain.	Dr. Phil B Lance

**Oracle Site Studio Contributor Interface:**

Data File - ECH11SGPREVIEW-001207

Elements Metadata

Heading

### Welcome to Your Personal Health Record Center

Enter Content Here

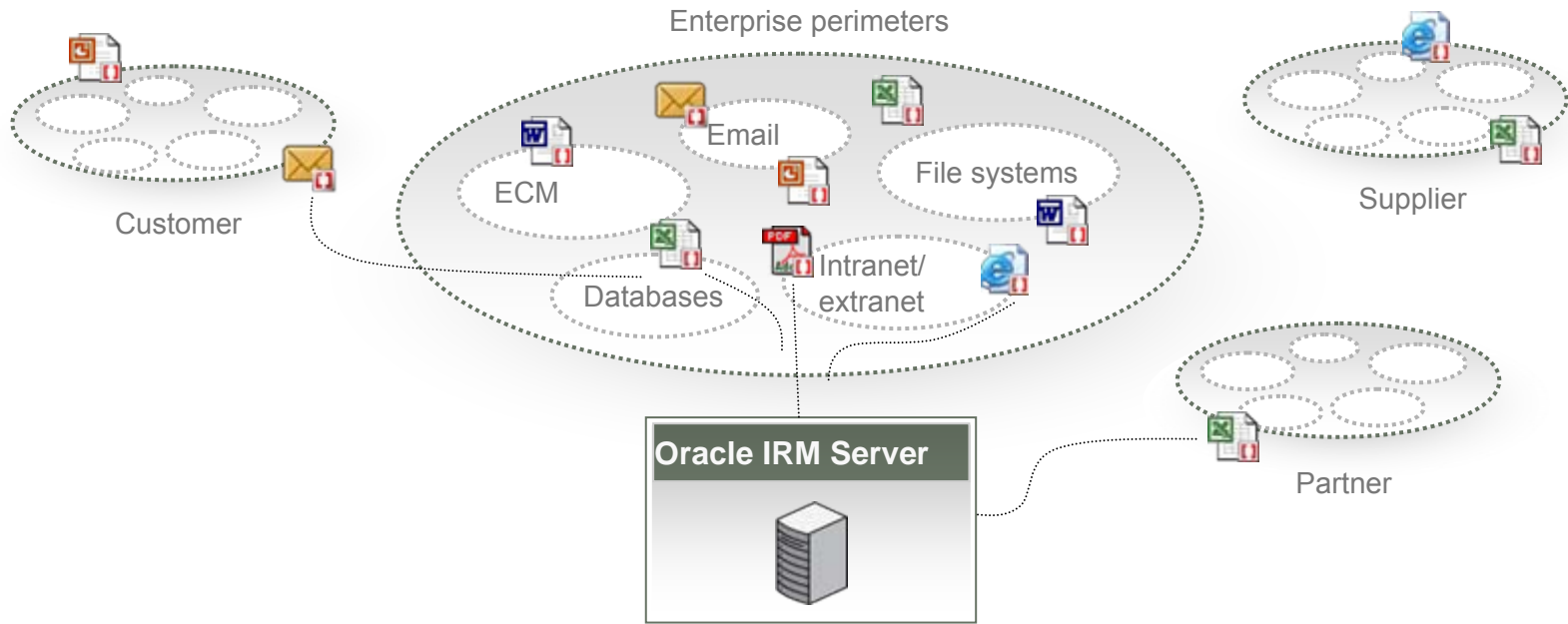
Gain access to your important medical history online. This will help you manage emergency contacts and ensure do not negatively interact with current medications.

Health Headlines

- [The power of tea to fight heart disease & prevent cancer](#)
- [Vaccinations - do men & women respond differently?](#)
- [10 tips to help you stay on track](#)



# Oracle ECM Suite Includes Information Rights Management

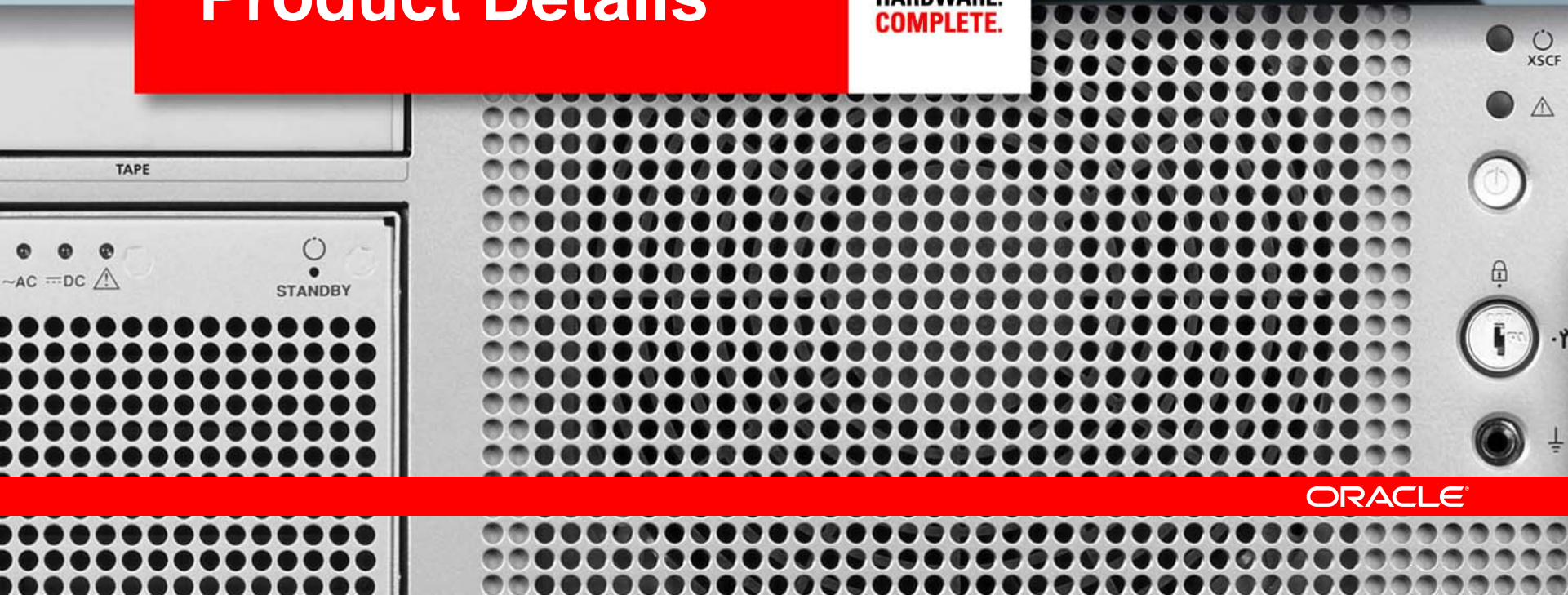


- Everywhere IRM-encrypted content is stored, transmitted or used
  - NO ACCESS FOR UNAUTHORIZED USERS
  - Transparent, revocable access for authorized users
  - Centralized policy and auditing for widely distributed content
- Content security beyond the database, application and firewall



# Product Details

**SOFTWARE.  
HARDWARE.  
COMPLETE.**



# Traditional Records Management

Managed in one location

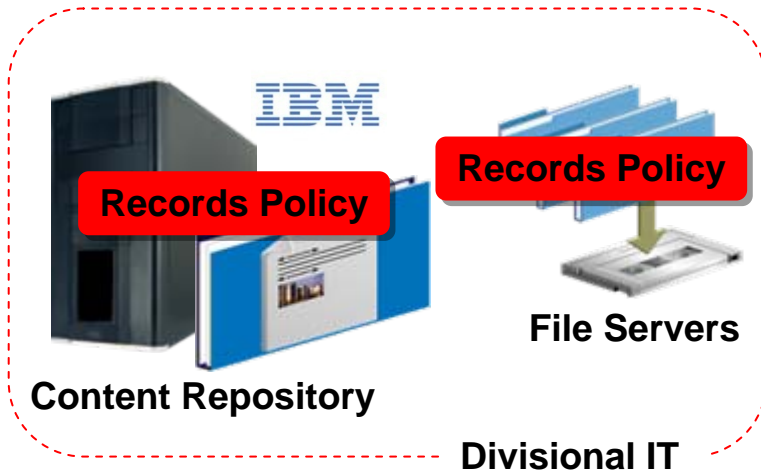
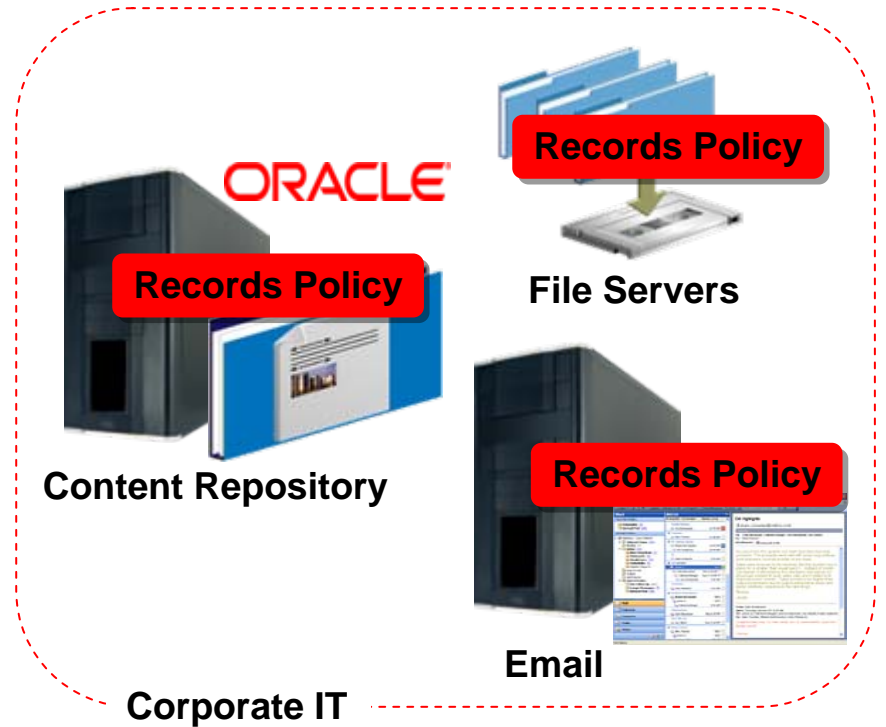
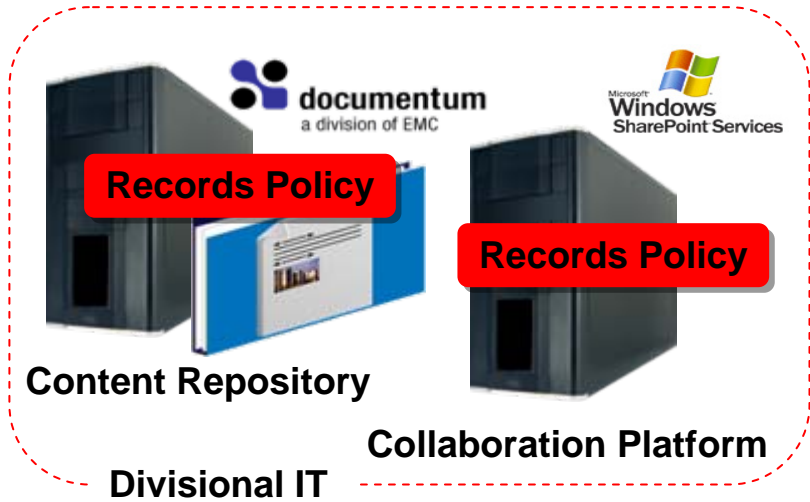
A red rounded rectangular button with the text "Records Policy" in white, positioned over a photograph of document storage shelves.

Records Policy

A photograph of document storage shelves, showing rows of white boxes or folders on metal shelving units.

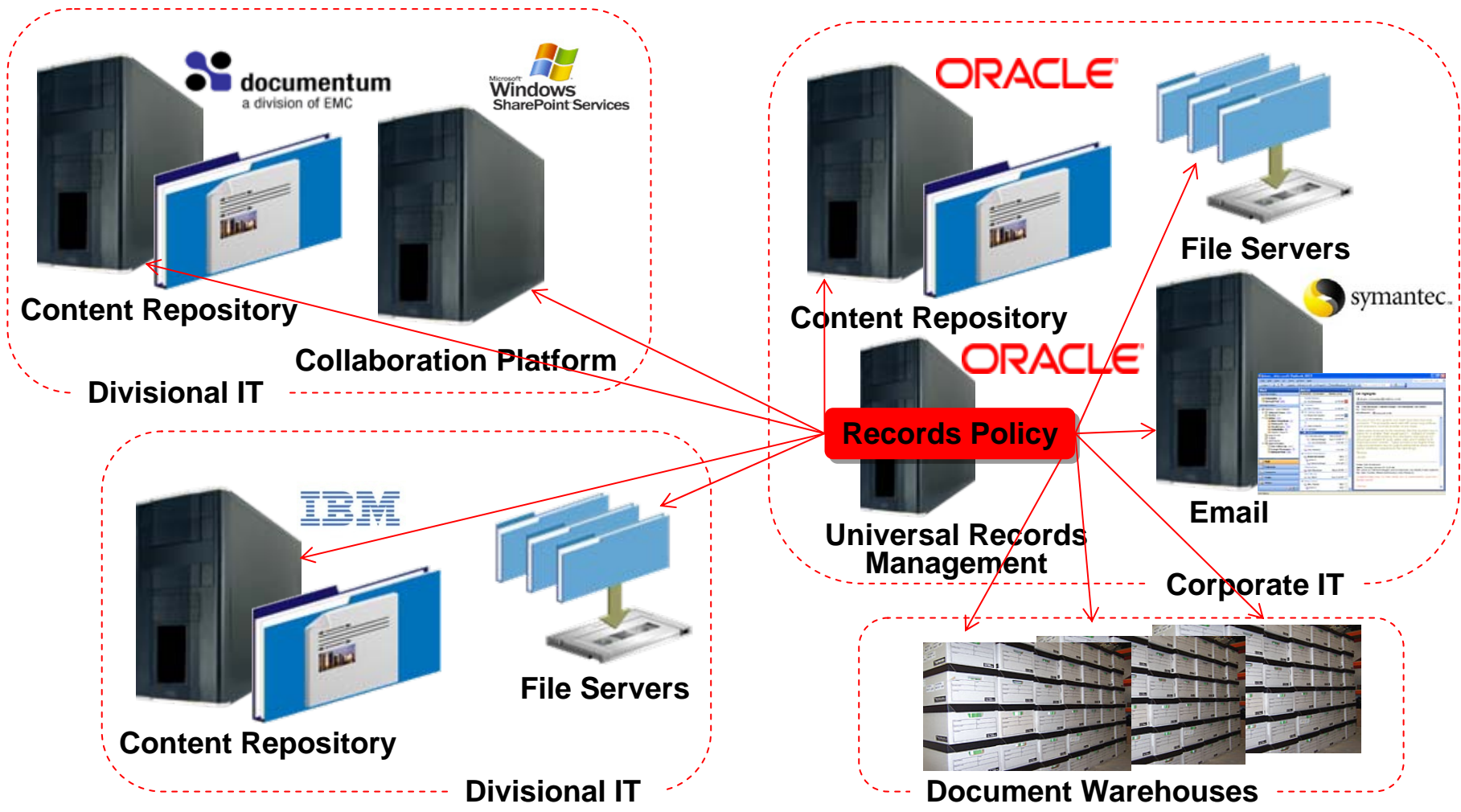
Document Warehouses

# Content Distributed Across Systems Creates Challenges for Records Management



# Content Distributed Across Systems

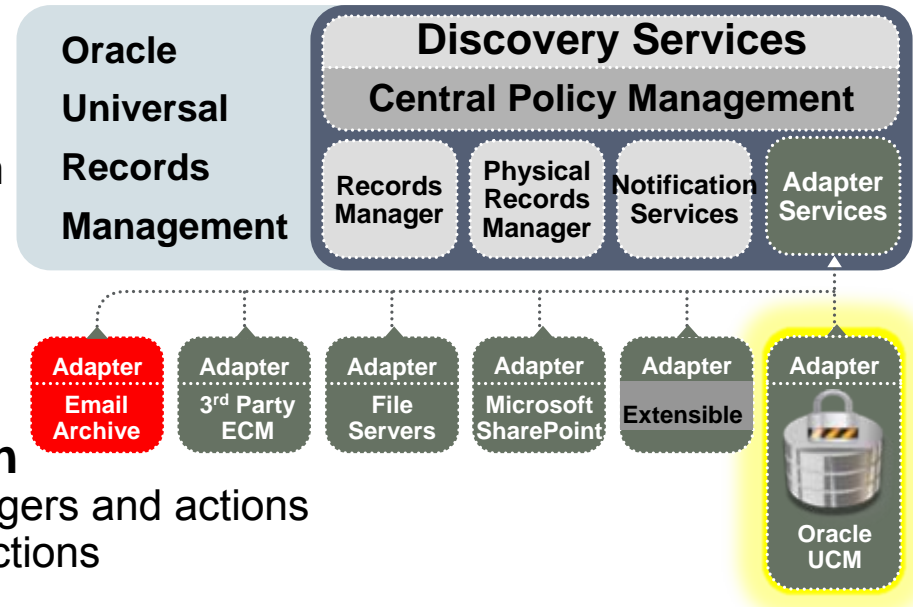
## Centralized Policy Management through Oracle URM





# Oracle Universal Records Management

- **Pervasive records management**
  - Apply records and retention policies in place to any content in any system
  - Electronic & physical records
- **Transparent to business users**
  - Work with familiar tools
  - Content stays in place
  - RM policies enforced automatically
- **Simple and flexible policy creation**
  - Ships with the standard life-cycle triggers and actions
  - Add business-specific triggers and actions
- **Perform legal holds and freezes**
  - Perform enterprise-wide discovery searches, apply legal holds, export to review tools
- **Enforce policies in any content repository**
  - Pre-built adapters for Oracle and 3<sup>rd</sup> party repositories
  - Generic adapters for custom or niche 3<sup>rd</sup> party repositories
  - ***Set policies for both the archive and the local content store***





# Records Management 11g (RM)

**Focus on day-to-day management and productivity**

- All UCM technical changes
  - WLS-based Architecture
- All Records Management features are available in UCM
  - URM is required only for Federated and Physical Records Management
- Management Features
  - Dashboards, Checklists & Alerts
- Productivity Features
  - Favorites, Bookmarks, Quick Copy

Configure : Enabled Features

Select a preset configuration below, or use the Custom option to choose your own settings. Note that you will need to restart the server after making any changes here.

Installation levels

- Minimal
- Typical
- DoD Baseline
- DoD Classified
- Custom

Features

<input checked="" type="checkbox"/> Related Content	<input checked="" type="checkbox"/> Audit Trigger	<input type="checkbox"/> Subject to Review
<input checked="" type="checkbox"/> Revision Dates	<input checked="" type="checkbox"/> Security Markings	<input type="checkbox"/> Email Fields
<input type="checkbox"/> DoD Configuration	<input type="checkbox"/> Classified Topics	<input type="checkbox"/> FOIA-Privacy Act

Disposition Actions

<input checked="" type="checkbox"/> Activate	<input type="checkbox"/> Obsolete	<input checked="" type="checkbox"/> Cancel
<input checked="" type="checkbox"/> Rescind	<input checked="" type="checkbox"/> Expire	<input checked="" type="checkbox"/> Cutoff
<input checked="" type="checkbox"/> Approve Deletion	<input checked="" type="checkbox"/> Destroy	

# Records Management 11g (RM)

Focus on day-to-day management and productivity

Dashboards, Checklists & Alerts

Favorites, Bookmarks, Quick Copy

**ORACLE Universal Records Management**

Home Search New Check In My Profile Tasks Saved Reports Help

My Content Server Browse Content Content Management Administration External Content

View Taskpanel: Admin Taskpanels

Alerts  
Initial Records Management setup is not complete!

My Approval List  
Cutoff - ImmediateDeleteCategory  
Cutoff - ImmediateMoveCategory

My Completion List for urm11g

My Pending Folders Review  
My Pending Content Review  
Performance Monitoring Information

**ORACLE Universal Records Management**

Home Search New Check In My Profile Tasks Saved Reports Help

My Content Server Browse Content Content Management Administration External Content

My Reservations

**Records Management Setup Checklist**

Records Management Setup Checklist

Expand All Details

- Set Configuration Variables:
  - Set NumConnections to 10 or higher **DONE**
- Define Default Metadata for:
  - Checked-in Audit Entries **DONE**
  - Checked-in Screening Reports **DONE**

Alert  
Initial Records Management setup is not complete!

**DONE**  
**DONE**

**ORACLE Universal Records Management**

Home Search New Check In My Profile Tasks Saved Reports Help

My Content Server Browse Content Content Management Administration External Content

**My Retention Favorites**

Remove	Add	ID	Name	Description
<input type="checkbox"/>	<input type="checkbox"/>	ACC-10-02	Invoices, Accounts Payable	Records received from creditors indicating...

Records Fields

- Record Activation Date
- Record Expiration Date
- Originating Organization
- Record Format
- Supplemental Markings
- Audit

\* Category or Folders

**Select Retention Category or ...**

http://10.143.122.114/urm11g/idcplg?IdcSe

- Select Retention Category or Folders
- Retention Schedules
- Skusky Import
- My Retention Schedule

# Configurable Records Definition

## Category Settings

- Control over items in category to determine whether or not
  - New revisions can be created
  - Items can be delete
  - Items can be edited
- Set when creating file plan
  - By an administrator not an end user
  - End user should not have to know whether or not budget is record

The screenshot shows the Oracle Universal Records Management interface for creating a retention category. The page title is "ORACLE Universal Records Management" with a search bar. The navigation menu includes Home, Search, New Check In, My Profile, Tasks, Saved Reports, and Help. The breadcrumb trail is: My Content Server > Browse Content > Content Management > Administration > External Content.

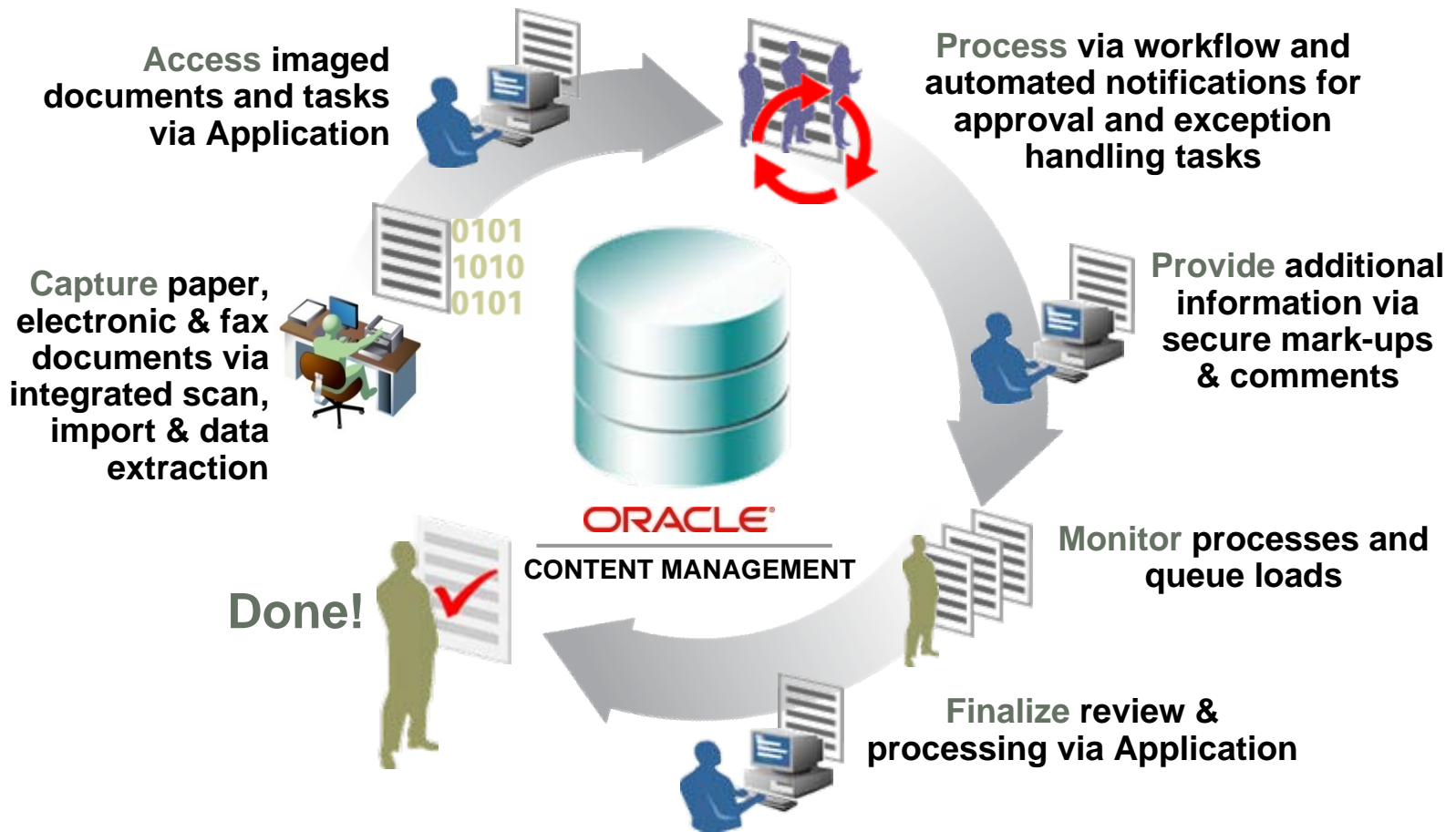
The main form is titled "Create Retention Category" and contains the following fields and options:

- Security Group:** RecordsGroup (dropdown)
- Author:** sysadmin (text input) and sysadmin (dropdown)
- Retention Category Identifier:** (text input)
- Retention Category Name:** (text input)
- Retention Category Description:** (text area)
- Disposition Authority:** (checkboxes for Restrict Revisions, Restrict Deletes, Restrict Edits, Permanent, Subject to Review)
- Reviewer:** (text input)
- Review Period:** (text input)
- Group Permissions:** (text input)
- User Permissions:** (text input)

At the bottom of the form are buttons for "Create", "Reset", and "Quick Help".

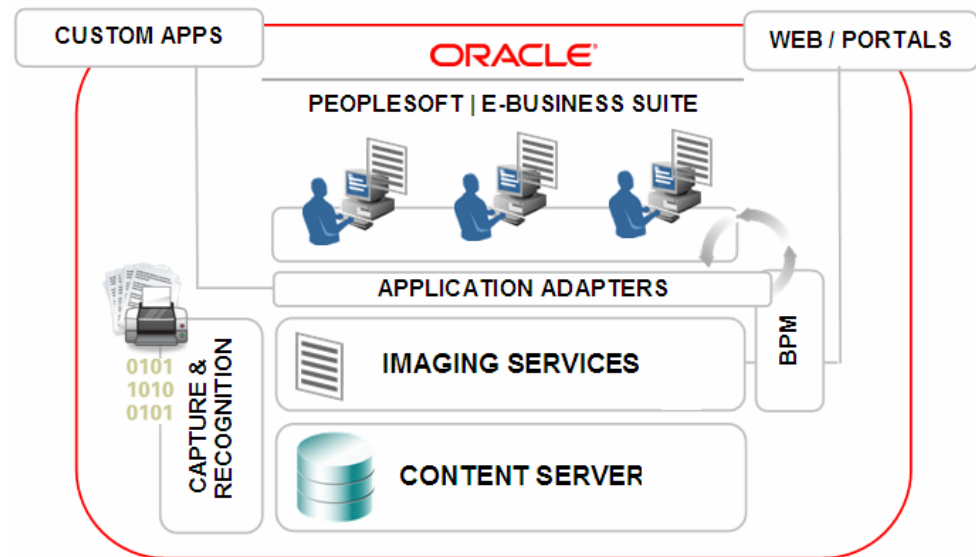
# Oracle Imaging Solution

## Cost Savings through Faster Processing



# Imaging and Process Management 11g (IPM)

- Complete:
  - Single-vendor, end-to-end process automation – applications, capture, imaging and workflow
- Integrated:
  - Productized, supported integrations with Oracle Applications
- Cost-effective:
  - Maximize IT investments & skill sets in Apps & Middleware
  - Long term strategic value as the default imaging solution for Applications Unlimited & Fusion Applications



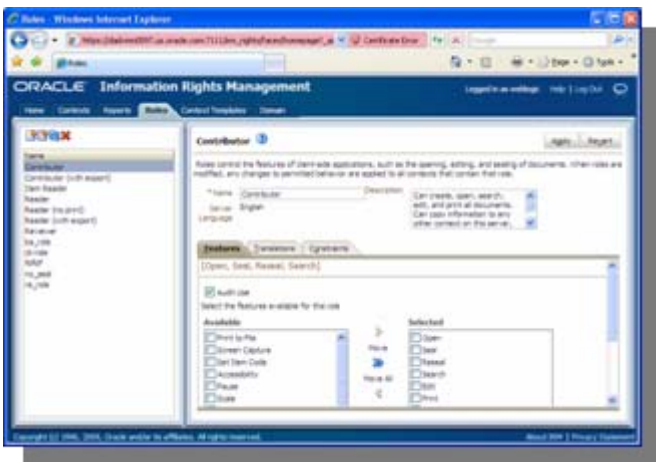
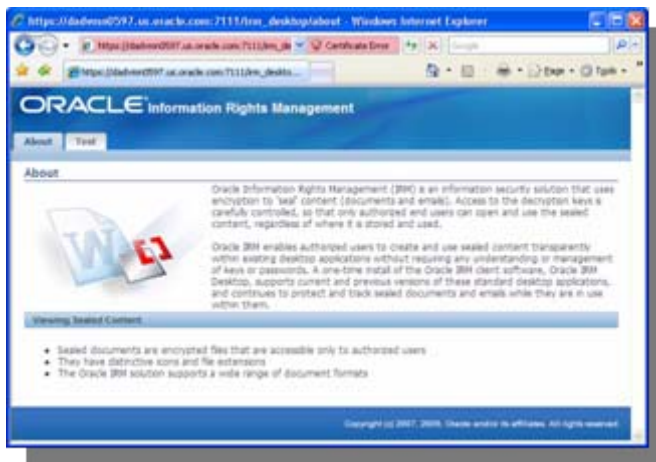
# IPM 11g is a 'Red Stack' investment



	IBPM 7.6	I/PM 10g	I/PM 11g
<b>Capture</b>	3 <sup>rd</sup> party	3 <sup>rd</sup> party / ODC	ODC / OFR
<b>Repository</b>	Proprietary	Embedded	UCM
<b>Workflow</b>	Embedded	BPM Suite	BPM Suite
<b>Viewer</b>	ActiveX	ActiveX	Java Applet
<b>Web Server</b>	IIS	IIS / iAS	WebLogic
<b>Directory</b>	Active Directory	Active Directory	AD/OiD / OpenLDAP
<b>Platform OS</b>	Windows	Windows	Win/Linux/Sol/HP-UX



# Information Rights Management 11g (IRM)

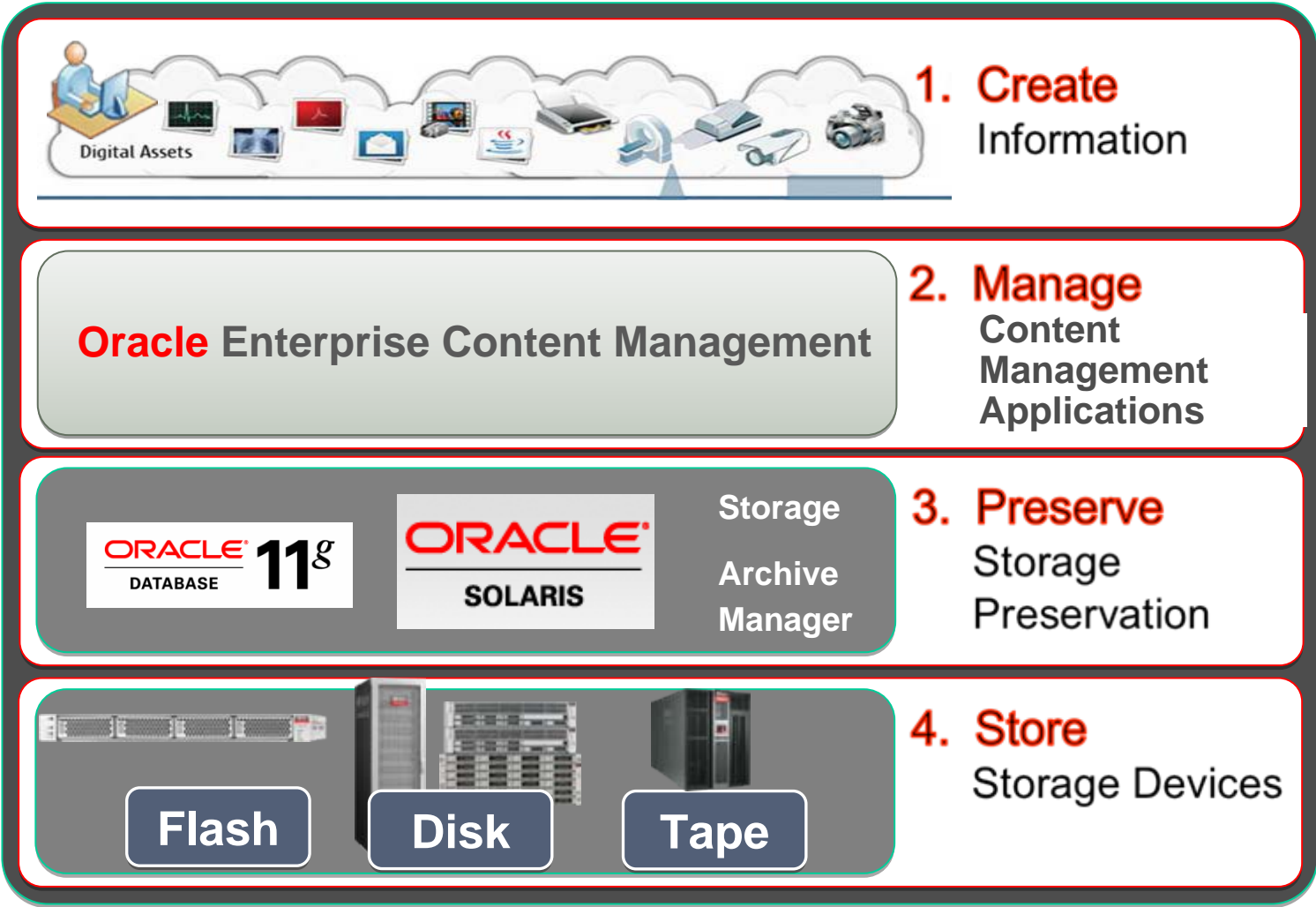


- Broader Enterprise Reach
  - Built on Fusion Middleware and Java EE
  - Broad platform certifications: OS & DB
  - SSO authentication: OAM, Windows auth, Basic auth to LDAP
- Extensible, First-Class Security
  - Extensible classification model for application integrations
  - Hardware Security Module for key storage
- Usability and Templates
  - New Web-based management console
  - Best practice rights model: global roles and templates

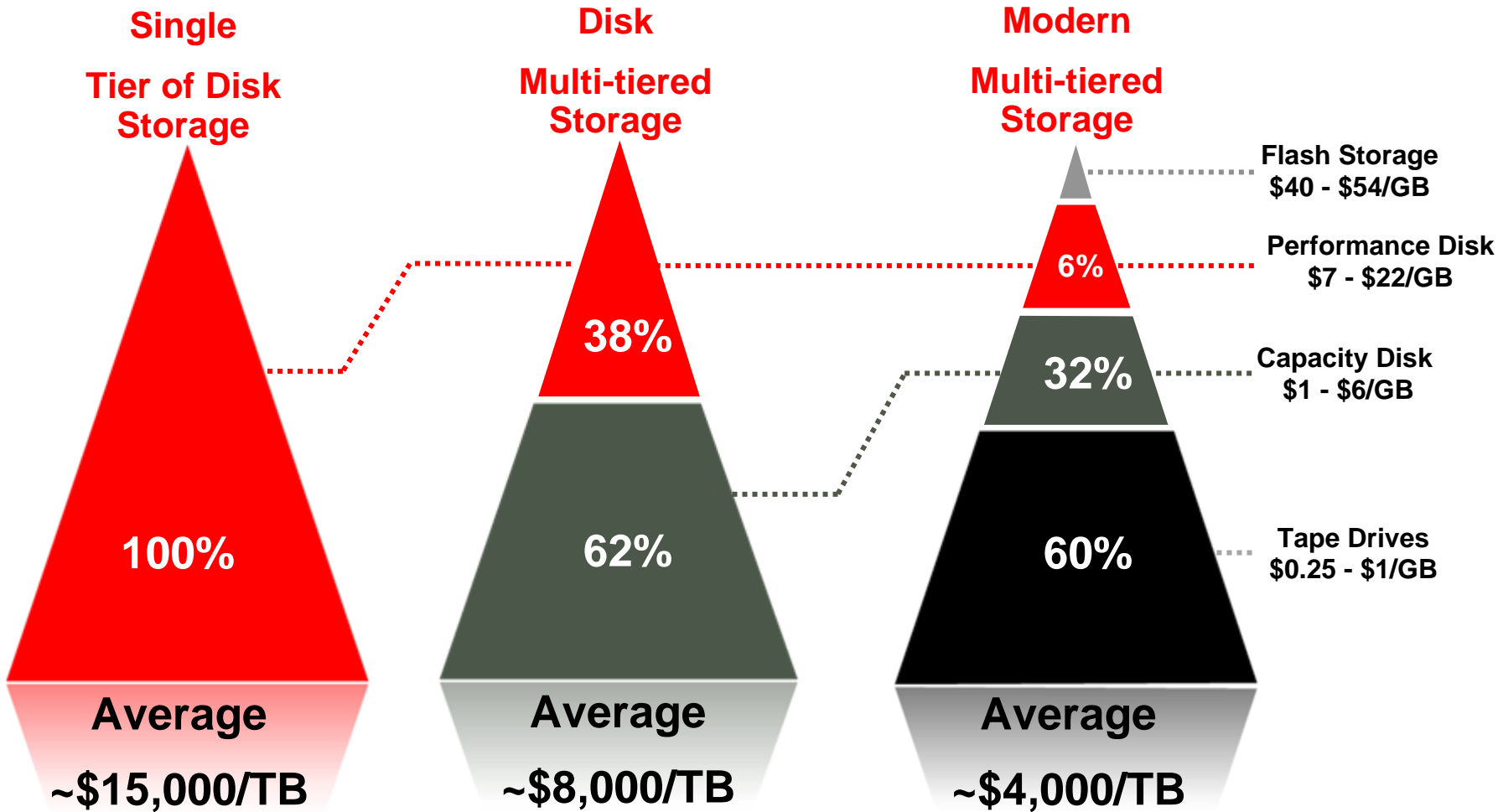
# Why ECM and Servers and Storage Together?

- ECM Implementation
  - DOES a great job of managing content
  - NEEDS someplace to put the data
  - DOESN'T need to manage the physical storage
  - KEEPS data for 1-10-100+ years
- Complete Solution: Hardware, Software, Complete
  - Reference Architectures of ECM+SAM+Servers+Storage in test today
  - It's not about Tape vs. Disk. It's about management and optimization of customer data across multiple storage types

# Oracle's End-to-End Solution for Content Management

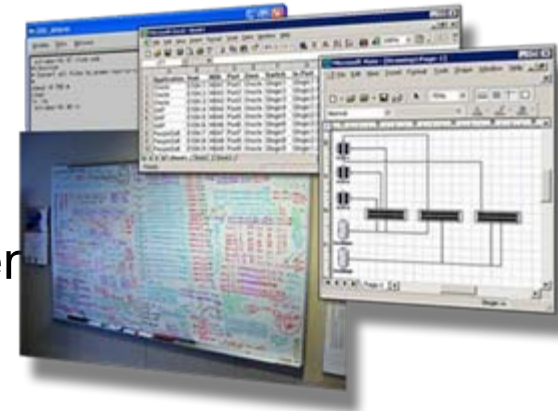


# Tiered Storage Reduces IT Costs

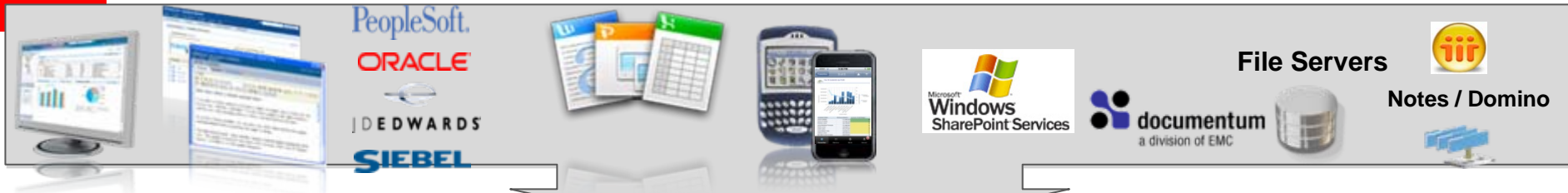


# SAM and QFS: How Data Gets Copied to Archive Disk and Tape

- SAM QFS: Storage Management Solution
  - Management and optimization of customer data across multiple storage types
- Two Integrated Components
  - QFS
    - Posix Compliant Clustered file system
    - Shared file system scaling to 100s of client
  - SAM
    - Storage Archive Manager
    - Policy based, dynamically manages tiers of storage
    - Sustains data through technology changes



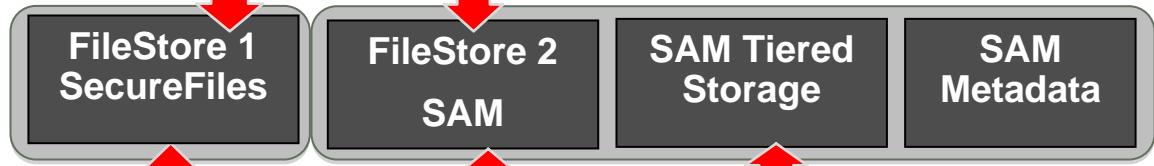
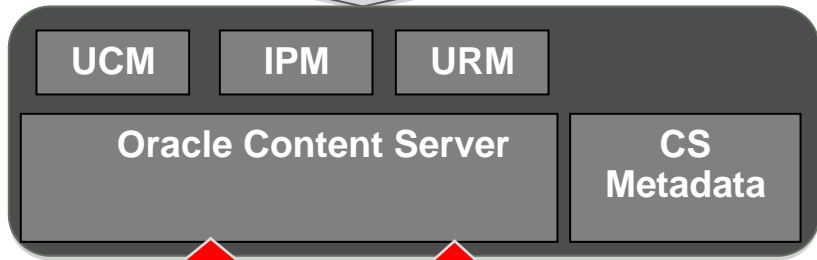
# ECM and SAM Together



## ECM + SAM

- ECM manages the content
  - Content Metadata
  - Stores in policy defined FileStore

- SAM manages the archive FileStore
  - Filesystem Metadata
  - Stores files dynamically in policy defined device



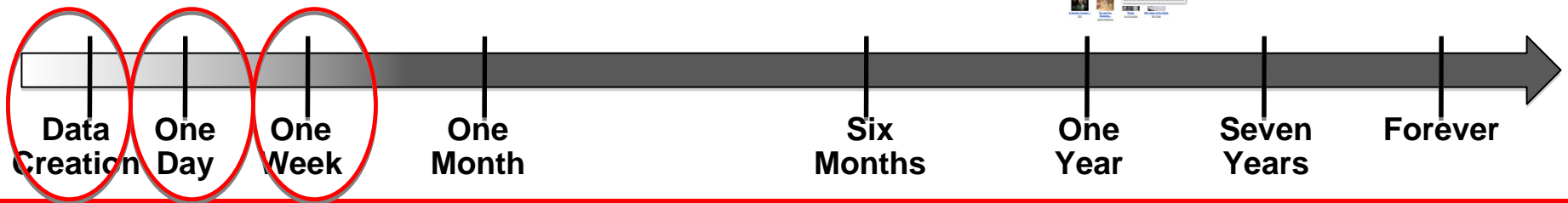
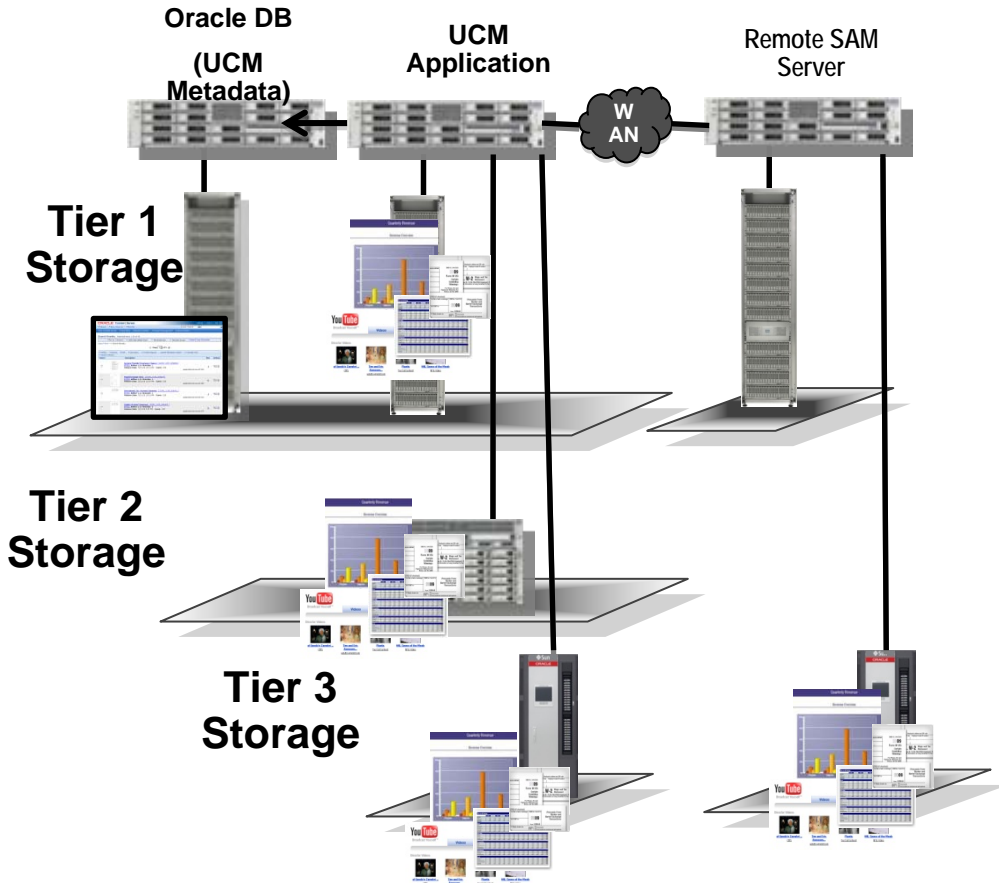
Local and Remote  
(Up to 4 archive images)



# SAM Archiver: Remote Tape



- Copy to Tiers of storage
  - Policy Based
  - Dynamic
  - Non-Disruptive
- Up to 4 Copies
- Remote Copy

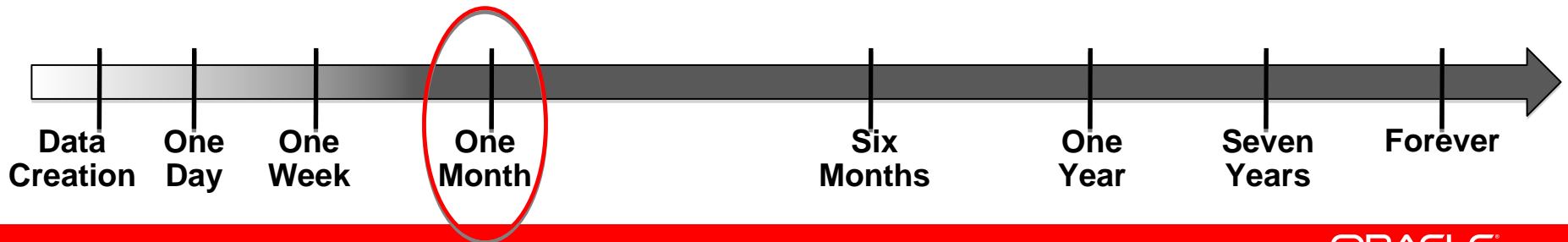
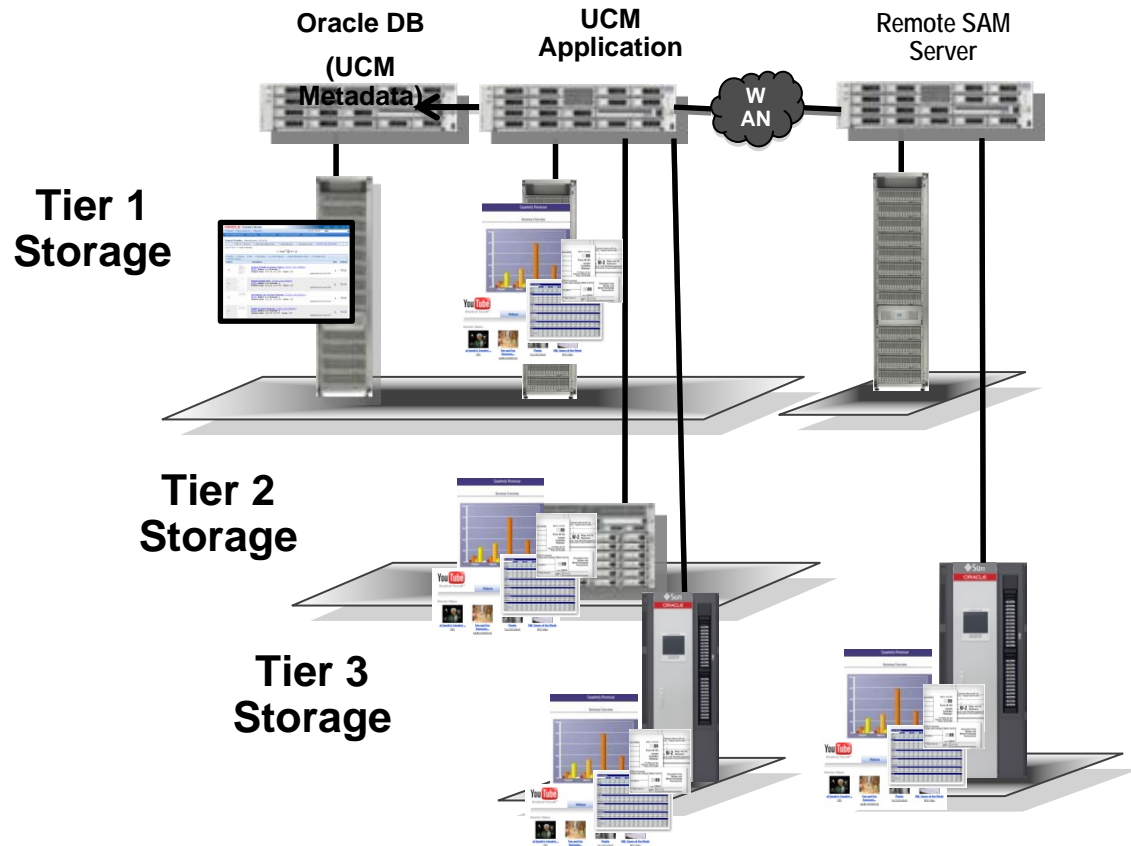


# SAM Releaser: Remove from Local Tier 1



Historical  
Searchable  
Available

- Release images from Tier 1
  - Policy Based
  - Dynamic
  - Non-Disruptive
- Accessable
- Searchable

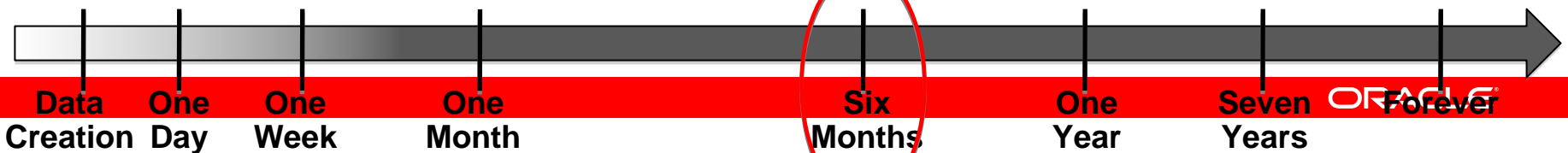
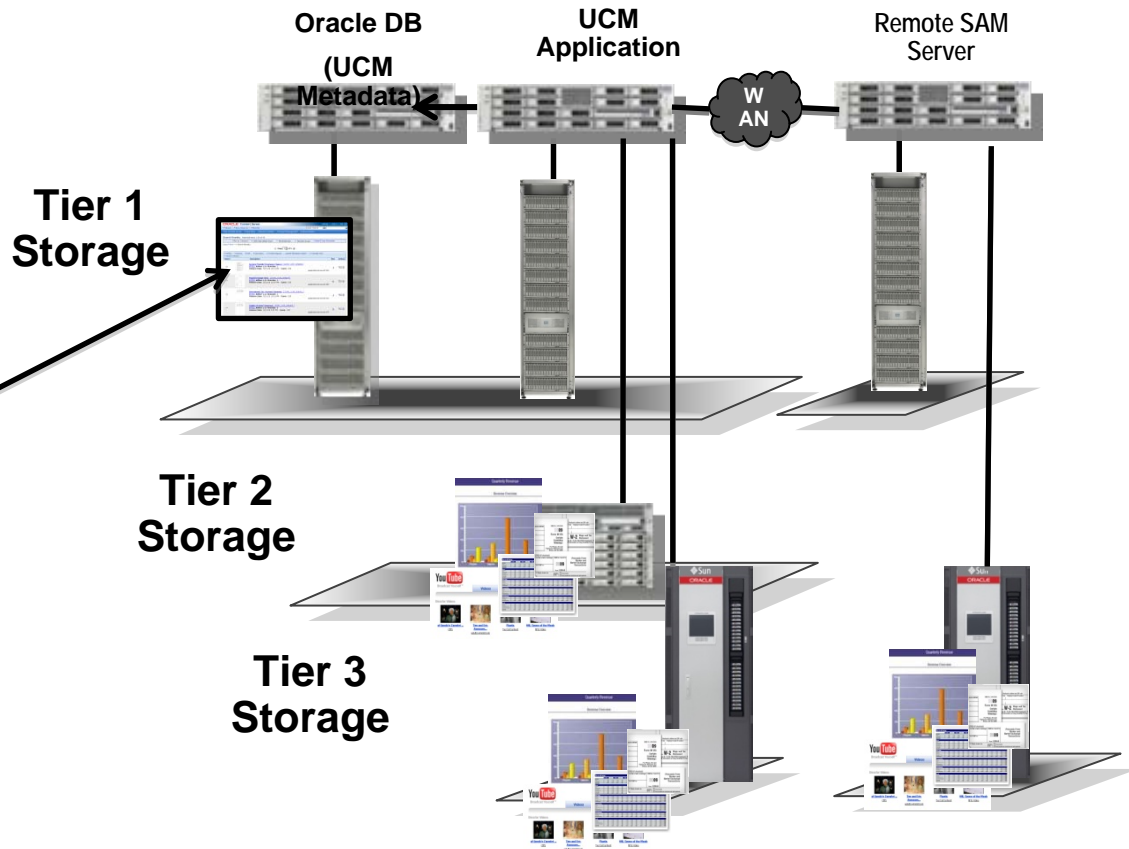


# Data Released from Local Tier 2 Disk

Historical  
Searchable  
Available



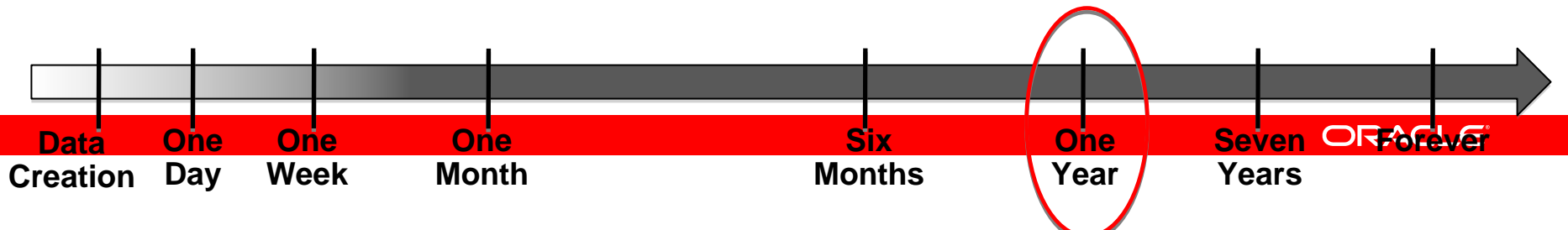
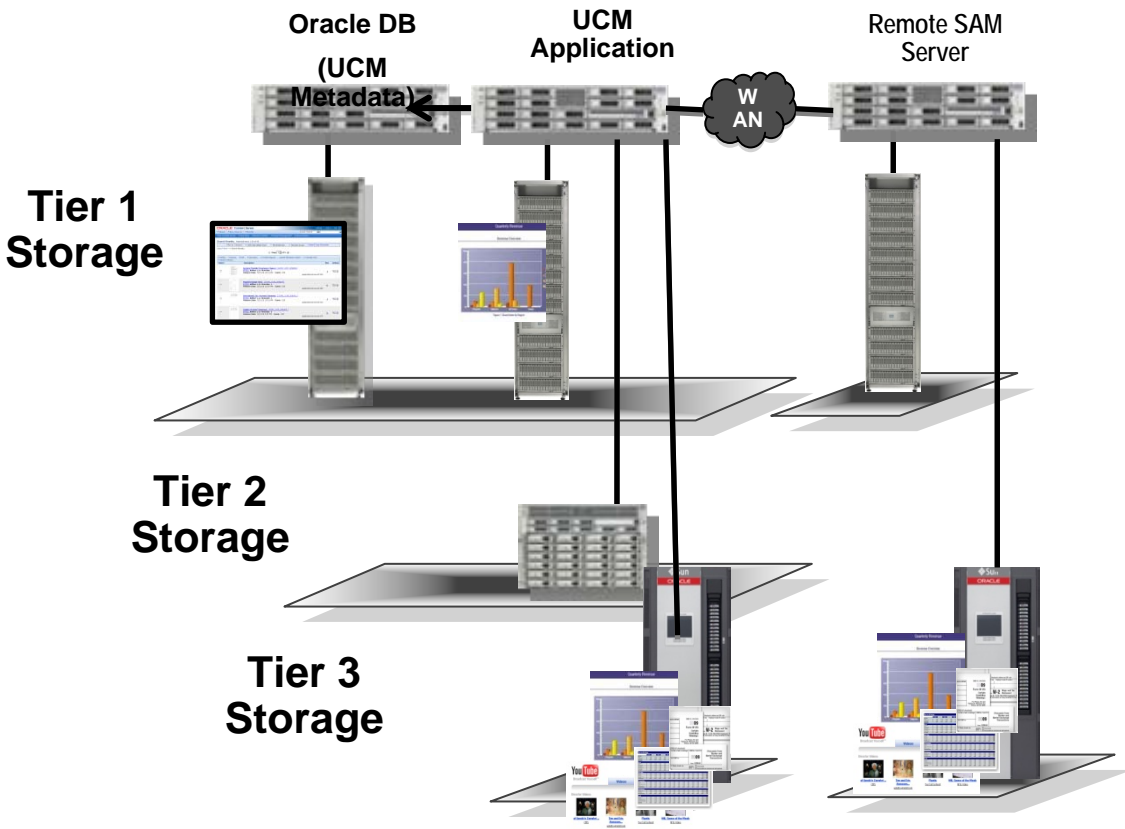
- Release images from Tier 2
  - Policy Based
  - Dynamic
  - Non-Disruptive
- Accessable
- Searchable



# SAM Stager: Access for Analysis



- Search and Access
- Stage accessed image
  - Dynamic
  - Non-Disruptive



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