OPENTEXT

OpenText Auto-Classification

Installation and Configuration Guide

This document provides instructions for installing and configuring OpenText Auto-Classification for use with Content Server.

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OpenText Auto-Classification
Installation and Configuration Guide

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This documentation has been created for software version 1.3.
It is also valid for subsequent software versions as long as no new document version is shipped with the product or is published at https://knowledge.opentext.com.

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i.i Documentation conventions

User interface
This format is used for elements in the graphical user interface (GUI), such as buttons, names of icons, menu items, and fields.

`Filenames, commands, and sample data`
This format is used for file names, paths, URLs, and commands at the command prompt. It is also used for example data, text to be entered in text boxes, and other literals.

Note: If you copy command line examples from a PDF, be aware that PDFs can contain hidden characters. OpenText recommends that you copy from the HTML version of the document, if it is available.

KEY NAMES
Key names appear in **ALL CAPS**, for example:
Press **CTRL+V**.

<*Variable name*>
Angled brackets < > are used to denote a variable or placeholder. The user replaces the brackets and the descriptive content with the appropriate value. For example, <*server_name*> becomes `serv01`.

Internal cross-references
Click the cross-reference to go directly to the reference target in the current document.

External cross-references
External cross-references are usually text references to other documents. However, if a document is available in HTML format, for example, in the Knowledge Center, external references may be active links to a specific section in the referenced document.

Warnings, notes, and tips

Caution

Cautions help you avoid irreversible problems. Read this information carefully and follow all instructions.

Important

Important notes help you avoid major problems.

Note: Notes provide additional information about a task.

Tip: Tips offer you quicker or easier ways of performing a task.

ii Contact information

OpenText Online (http://online.opentext.com/) is a single point of access for the product information provided by OpenText. You can access the following support sources through OpenText Online:

- Communities
- Knowledge Center

OpenText Online Communities (https://communities.opentext.com/communities/cs.dll/open/OpenTextOnlineCommunity) provide the following resources:

- Usage tips, help files, and best practices for customers and partners.
- Information on product releases.
- User groups and forums where you can ask questions to OpenText experts.

The OpenText Knowledge Center (https://knowledge.opentext.com) is OpenText's corporate extranet and primary site for technical support. The Knowledge Center is the official source for the following:

- Product downloads, patches, and documentation including Release Notes.
- Discussion forums, Online Communities, and the Knowledge Base.
- OpenText Developer Network (OTDN), which includes developer documentation and programming samples for OpenText products.

If you need additional assistance, you can find OpenText Corporate Support Contacts at http://support.opentext.com/.

Chapter 1

Introduction

OpenText Auto-Classification is an application that is used to automatically assign RM (Records Management) Classifications to documents in Content Server.

1.1 About This Guide

This guide is written for the person responsible for installing and deploying Auto-Classification for use with Content Server.

This guide assumes that you possess the following knowledge and skills:

- A basic understanding of Auto-Classification and how it will be used to classify your organization's content.
- An understanding of RM Classifications, and the other Content Server modules required by Auto-Classification.
- Familiarity with the operating system on which you are installing Auto-Classification.
- Web server administration skills.
- Familiarity with Java application servers and servlets.

1.2 Prerequisites

This section provides you with the components required for installing Auto-Classification and configuring it for use with Content Server.

- OpenText Content Server, version 10.0.0 plus Update 4, or later
- Content Server Advanced Auto-Classifications, version 10.0.0
- OpenText Records Management, version 10.1.0
- OpenText Classifications, version 10.1.0

The following OpenText products are not directly used by Auto-Classification; however, they may be required during normal use of Content Server and Records Management:

- OpenText Object Importer
- OpenText Object Exporter
- OpenText Object Importer, Records Management Edition
- OpenText Object Exporter, Records Management Edition
- OpenText Physical Objects

1.2.1 Installing and Updating Content Server Advanced Auto-Classifications

Updating Advanced Auto-Classifications requires you to uninstall the previous version, and install the latest version.

Note: If you want to retain the information contained in the *AdvClassRequests* table, you must make a backup copy of it before beginning uninstalling Advanced Auto-Classifications from Content Server. After you complete the new installation, you will migrate the table data back into the latest version. For more information, see "Migrating the AdvClassRequests Table" on page 45.

To uninstall Content Server Advanced Auto-Classifications:

1. In the **Module Administration** section of the Administration page, click the **Uninstall Modules** link.
2. On the **Uninstall Modules** page, click the **Uninstall** button beside Advanced Auto-Classifications.
3. In the confirmation dialog box, click **OK**.
4. Restart the server and Web application server, and then click the **Continue** link on the **Restart Content Server** page.
5. On the **Start** menu, click **Control Panel**, and then click **Add or Remove Programs**.
6. Right click on **OpenText Advanced Auto-Classifications**, and then click **Uninstall**.

To install Content Server Advanced Auto-Classifications:

1. On the OpenText Knowledge Center, download the `Advclass_10.0.X_WIN.exe` installer, located in the Auto-Classification directory.
2. Click to run the `Advclass_10.0.X_WIN.exe` file, and follow the instructions in the installer to complete the initial part of the installation.
3. Restart Content Server.
4. In the **Module Administration** section of the Administration page, click the **Install Modules** link.
5. Select the **Content Server Advanced Auto-Classifications 10.0.xx** check box, and then click **Install**.
6. Restart the server and Web application server, and then click the **Continue** link on the **Restart Content Server** page.
7. In the `<CS_INSTALL>\webservices\dotnet` folder, and create the following subfolder: `advclass`.

8. In the `advclass` folder, create the following subfolder: `bin`.
9. Copy the `Advclass.svc` file, located in the *`<CS_INSTALL>`*`\module \advclass_10_0_3\webservices\dotnet\advclass\` directory, to the `<CS_INSTALL>\webservices\dotnet\advclass` directory.
10. Copy the `*.dll` file, located in the `<CS_INSTALL>\module \advclass_10_0_3\webservices\dotnet\advclass\bin\` directory, to the `<CS_INSTALL>\webservices\dotnet\advclass\bin` directory.
11. In IIS Manager, right-click **Default Web Site**, and then click **Add Application**.
12. In the **Alias** box, enter the AdvClass Web Service name.
13. Select **DefaltAppTool** from the **ApplicationPool** menu.
14. In the **Physical Path** area, click the **Browse** button, and then select `<CS_INSTALL>\webservices\dotnet\advclass\`.
15. Click **OK**.
16. In the `<CS_INSTALL>\webservices\dotnet\advclass\` folder, , create the following new file: `web.config`, and then paste the following:

```
<?xml version="1.0" encoding="utf-8"?> <configuration>
<appSettings>          <add key="livelink.host" value="localhost" /
>          <add key="livelink.port" value="2099" />          <add
key="livelink.encoding" value="UTF8" />     </appSettings>
<!-- IIS 6 configuration -->     <system.web>
<httpModules>               <add name="LogModule"
type="OpenText.Livelink.Service.Core.LogModule" />          </
httpModules>     </system.web>     <!-- IIS 7 configuration -->
<system.webServer>          <modules>               <add
name="LogModule" type="OpenText.Livelink.Service.Core.LogModule"
preCondition="managedHandler" />          </modules>
<validation validateIntegratedModeConfiguration="false" />
<!-- Enable following section if necessary      <handlers>
<add name="svc-Integrated" path="*.svc" verb="*"
type="System.ServiceModel.Activation.HttpHandler,
System.ServiceModel, Version=3.0.0.0, Culture=neutral,
PublicKeyToken=b77a5c561934e089" resourceType="Unspecified"
preCondition="integratedMode" />     </handlers>     -->     </
system.webServer>     <system.diagnostics>          <trace
autoflush="true" indentsize="2">              <listeners>
<add name="advclass.log"
type="OpenText.Livelink.Service.Core.TraceListener,OpenText.Livel
ink.Service.Core" initializeData="logs\advclass.log" />
</listeners>          </trace>          <!-- 0=Off, 1=Error,
2=Warning, 3=Info, 4=Verbose -->          <switches>
<add name="TraceLevel" value="3" />          </switches>     </
system.diagnostics>   <system.serviceModel>     <behaviors>
<serviceBehaviors>          <!-- To enable SSL meta-data retrieval,
```

```
add httpsGetEnabled="true" and httpsGetUrl="" to the serviceMetadata
element -->                <behavior name="AdvclassBehavior">
<serviceMetadata httpGetEnabled="true" httpGetUrl="" />
<serviceDebug includeExceptionDetailInFaults="true"
httpHelpPageUrl="" />          </behavior>                </
serviceBehaviors>     </behaviors>     <bindings>
<basicHttpBinding>          <binding name="AdvclassBinding"
maxReceivedMessageSize="1024000" messageEncoding="Text"
transferMode="Buffered">            <security mode="None">
<transport clientCredentialType="None" />            </security>
</binding>          <binding name="AdvclassServiceBinding_SSL"
maxReceivedMessageSize="1024000" messageEncoding="Text"
transferMode="Buffered">            <security mode="Transport">
<transport clientCredentialType="None" />            </security>
</binding>                </basicHttpBinding>     </bindings>
<services>        <service
behaviorConfiguration="AdvclassBehavior"
name="OpenText.Livelink.Service.Advclass.Advclass_WCF">
<endpoint address="" binding="basicHttpBinding"
bindingConfiguration="AdvclassBinding"
bindingNamespace="urn:Advclass.service.livelink.opentext.com"
contract="OpenText.Livelink.Service.Advclass.IAdvclass_WCF" />
</service>     </services>   </system.serviceModel> </
configuration>
```

17. Replace the livelink.host and livelink.port with your Content Server information.
18. Restart the IIS site.

1.2.2 Third Party Components

Note: The version numbers of third-party software that OpenText supports can change for any new version of Content Server and its modules. For more detailed information about certified and supported products and product combinations (including specific software versions and releases), see the Release Notes that accompany this documentation. The most recent version of the *Content Server Release Notes* is maintained on the OpenText Knowledge Center (https://knowledge.opentext.com/).

In addition to Auto-Classification, Content Server, and the required Content Server modules, the following components are required:

- A server operating system. OpenText supports the following operating systems:
  - Microsoft® Windows® 2008 Server R2
  - Ubuntu® Linux® (64–bit), version 10.04 LTS Desktop

Note: Ensure that you have the required Linux components installed. For more information, see the section called "Linux Specific Components" on page 12.

- A Web server for using the OTAC Web application. OpenText supports the following Web servers:
  - On Windows: Internet Information Server® (IIS)
  - On Ubuntu Linux: Apache Web server, version 2.2 or later and including PHP, version 5.2 or later

    Note: When you install PHP with the Apache Web server, ensure that the cURL module and PHAR Extension are installed.

    PHP 5.3 includes PHAR support in the installation package, and you do not need to manually install PHAR support. However, if you are using an earlier version of PHP, you must also manually install PHAR Extension on the Apache Web server. For more information, see the corresponding third-party documentation.
- Java Development Kit (JDK), version 1.6 Update 31

  Note: On Linux, Java 1.6 can only be installed manually. Follow the Java 1.6 installation instructions. You must then define the *JAVA_HOME* parameter. To do this, create the `java.sh` file in `/etc/profile.d` and add it to the following commands:

  ```
  export JAVA HOME=</path>/Java/jdk1.6.0 31
  ```

  ```
  export PATH=${JAVA HOME}/bin:${PATH}
  ```

  This file will be read the next time you log on. Otherwise, you could source the file to ensure `JAVA HOME` is set immediately using the following command: `$ sudo source/etc/profile.d/java.sh`.
- Web browsers on client workstations. The following are supported:
  - Microsoft Internet Explorer, version 8
  - Firefox, version 3.6

Note: This guide includes instructions for configuring third-party components as they relate to Auto-Classification. However, you should always refer to the documentation for those products for complete setup and configuration information.

Linux Specific Components

On Ubuntu Linux, ensure that the following Linux packages are installed:

- ia32-libs
- lib32gcc1
- lib32stdc++6
- lib32z1
- libc6
- libc6-i386
- libexpat1
- libfontconfig1
- libfreetype6
- libgcc1
- libglib2.0-0
- libjpeg62
- libpcre3
- libpng12-0
- libstdc++6
- libtiff4
- libx11-6
- libxau6
- libxcb1
- libxdmcp6
- libxpm4
- libxrender1
- zlib1g
- phython-software-properties
- apache2
- php5
- php5–curl

Tip: You can install the required packages by running the following command: `sudo apt-get install ia32-libs lib32gcc1 lib32stdc++6 lib32z1 libc6 libc6-i386 libexpat1 libfontconfig1 libfreetype6 libgcc1 libglib2.0-0 libjpeg62 libpcre3 libpng12-0 libstdc+6 libtiff4`

```
libx11-6 libxau6 libxcb1 libxdmcp6 libxpm4 libxrender1 zlib1g
python-software-properties apache2 php5 php5-curl
```

1.2.3 Hardware Requirements

The hardware requirements for Auto-Classification vary depending on how your organization is using Auto-Classification. This section provides the minimal requirements needed for a production environment and for development purposes.

Production Environment

The following list provides the minimum hardware requirements for an optimal production environment, or load testing-ready staging purpose:

- Dual Intel® Xeon™ Quad Core 64-bit Processors 2.33@1333Mhz / 4MB cache
- 24 GB RAM
- 1 Network Interface of 1000 Mbps
- Ultra Wide SCSI RAID0/10 Hard Disk, 146 GB of 15K RPM

Note: It is vital to mount your data on an exclusive hard drive. From a hardware perspective, shared virtual machine disks on the same physical hard drive can lead to performances issues and other risks, such as corrupted data due to I/O collisions.

The Solr component of Auto-Classification requires extreme disk I/O. When you create a virtual machine, it is mandatory to assign data to independent, physical drives (For example, mount /opt/ to a stand-alone 15000rpm drive). Concurrent I/O can be further maximized by stripping this data in RAID0 across multiple, dedicated spindles and apply mirroring in RAID 10.

Development Environment

The following list provides the minimum hardware requirements needed when you are using Auto-Classification for a development purpose:

- Duel Core Intel 64-bit Processor 3.00 at 1333 Mhz/2 MB cache
- 5~16 GB of RAM
- SATA Hard Disk, 146 GB at 10K RPM
- 1 Network Interface at 1000 Mbps

Chapter 2

Installing and Configuring Auto-Classification on Windows

Before you begin the installation process, ensure that all prerequisites are met, and you have the required information available as a reference. Use the Installation Worksheet in this guide to record the values you enter during the installation process. For more information, see "Installation Worksheets" on page 55.

Note: Solr and Document Conversion Service (DCS) are bundled and installed with OTAC. DCS is used to convert content from Content Server into a readable format; Solr is a search engine used by Auto-Classification. In the user interface, Solr is represented as the Auto-Classification Engine. Neither of these components require additional configuration, but you may need to start the services after the installation is complete.

Content Web Services (CWS) Base URLs Parameters

The following list provides the default parameters you will use when you enter the CWS Base URLs during the installation:

- **Advclass Base URL**: `http://<ContentServer_IP_Address>/les-services`
- **Authentication Base URL**: `http://<ContentServer_IP_Address>/les-services`
- **ContentService Base URL**: `http://<ContentServer_IP_Address>/les-services`
- **DocumentManagement Base URL**: `http://<ContentServer_IP_Address>/les-services`
- **RecordsManagement Base URL**: `http://<Content_Server_IP_Address>/les-services-recordsmanagement`

Note: Check available CWS on your Content Server instance, and then use the appropriate URLs for the required CWS. If a required module does not provide its own CWS, use the default *`les-services`*.

2.1 Installing Auto-Classification

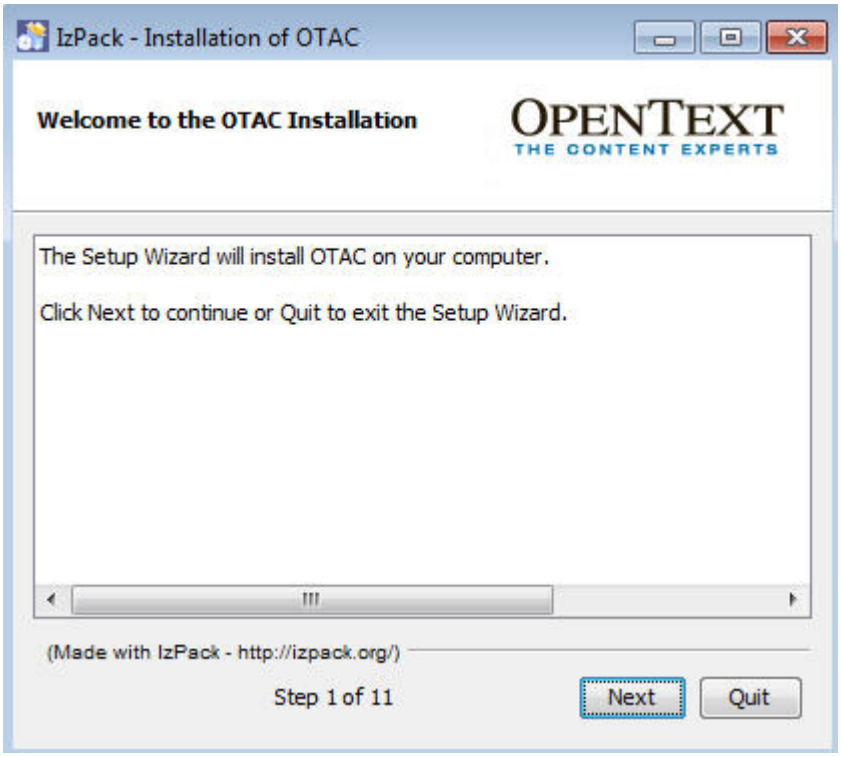
To make the installation process easier, you should install Auto-Classification from a computer on which you have Administration privileges.

If your Windows account does not have Administrator privileges, you must launch the Auto-Classification Installer with Administration Rights. For more information, see "To install Auto-Classification using a Windows account without administration privileges:" on page 22.

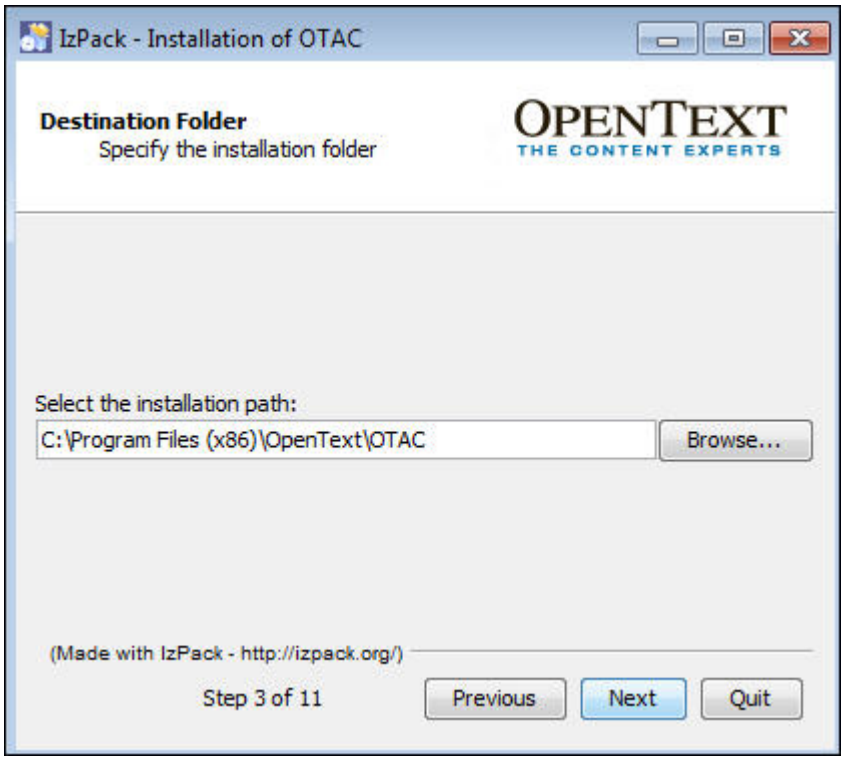
To install Auto-Classification on Windows:

Note: Be sure to have the "Installation Worksheets" on page 55 available during the installation process so you can record the directory locations, URLs, and Port Settings. You will need this information to configure Auto-Classification.

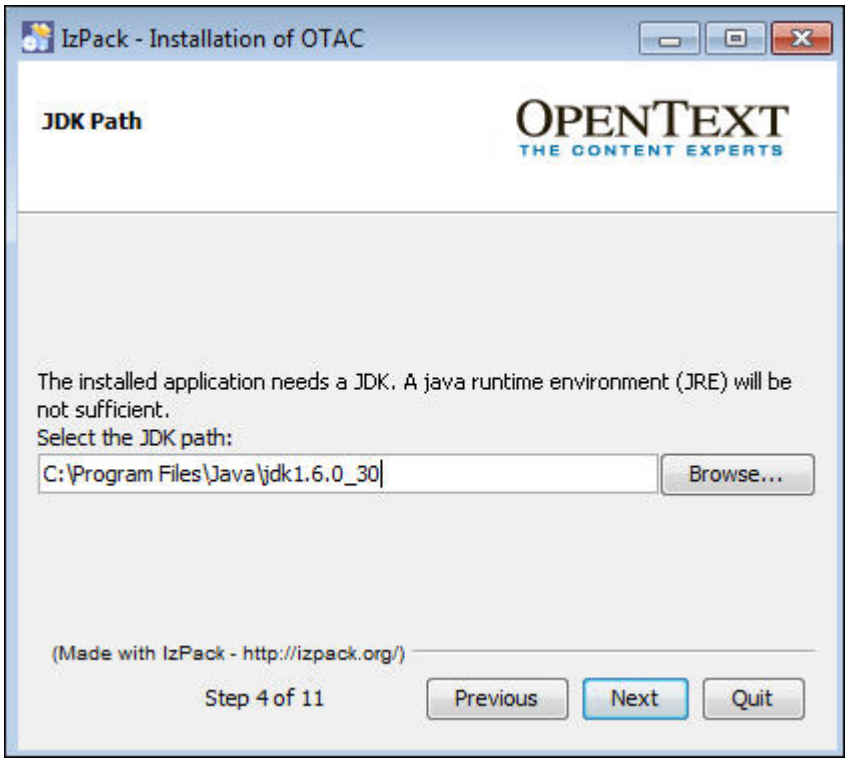
1. Double-click to open the Auto-Classification `.jar` file, and then click **Run** to start the installation process.
2. In the Welcome to the OTAC Installation window, click **Next**.



3. In the License Agreement window, click the **I accept the terms of this license agreement** button, and then click **Next**.
4. In the Destination Folder window, accept the default destination directory, or click **Browse** to select a different directory, and then click **Next**.



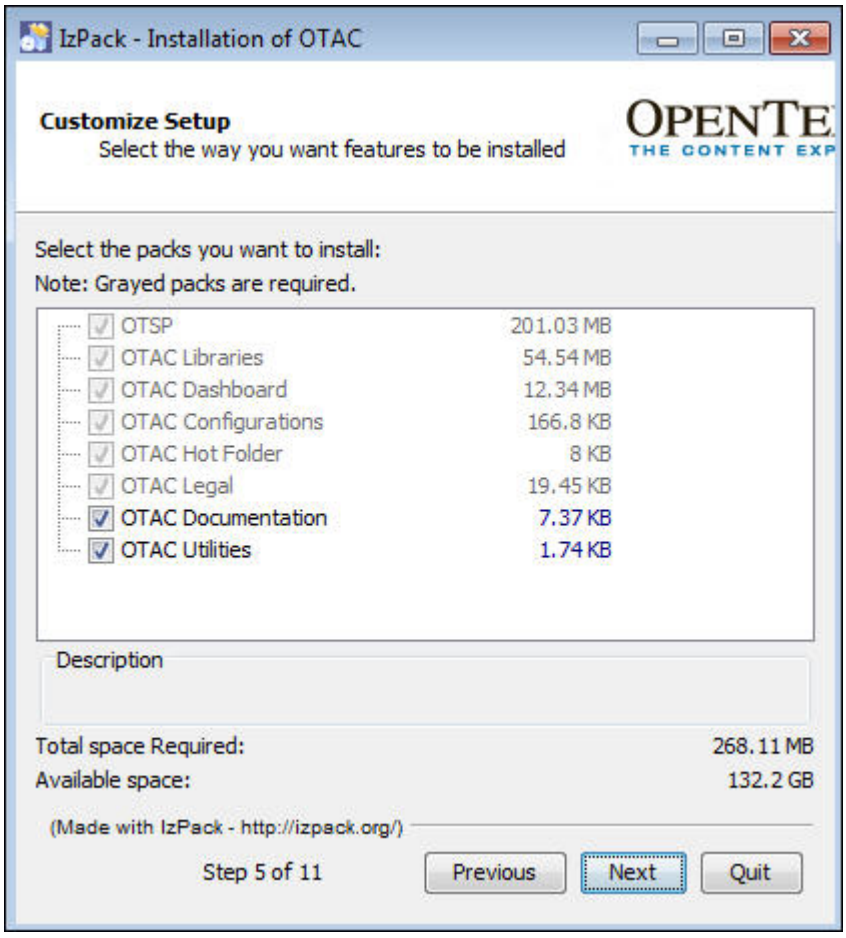
5. In the JDK Path window, click **Browse** to navigate to the directory where JDK is installed, and then click **Next**.



Note: If the installer can determine the location of the JDK, and the minimum version requirements are satisfied, this step does not appear.

6. In the Customize Setup window, select the check box for each component you want installed.

Note: The required components are automatically selected and cannot be changed.



7. In the Port Options window, do the following, and then click **Next**:

   - In the **Webapp Base Path** field, type `/`.

     Note: By default, the Webapp Base Path is `/` and should not be modified. If you change this parameter, OTAC will get installed, but cannot be used. For information about assigning a URL to a Website, consult the official third-party documentation for IIS.

   - In the **Language** field, select a default language for the UI in the **Language** drop-down list.

     Note: The language can be changed later by each user from the UI.

   - In the **Listen port** field, accept the default port number, or type a new one for the TCP port where REST calls are sent.
   - In the **Content Web Services (CWS) base URLs** section, type the URL for the Web Services that OTAC uses to communicate with Content Server in the following format:

`http://<host_name>:<port number>/<service_base_URL>` where *<host_name>* is the virtual host name, *<port number>* is the port number, and *<service_base_URL>* is the relative path to the web service installed on Content Server.

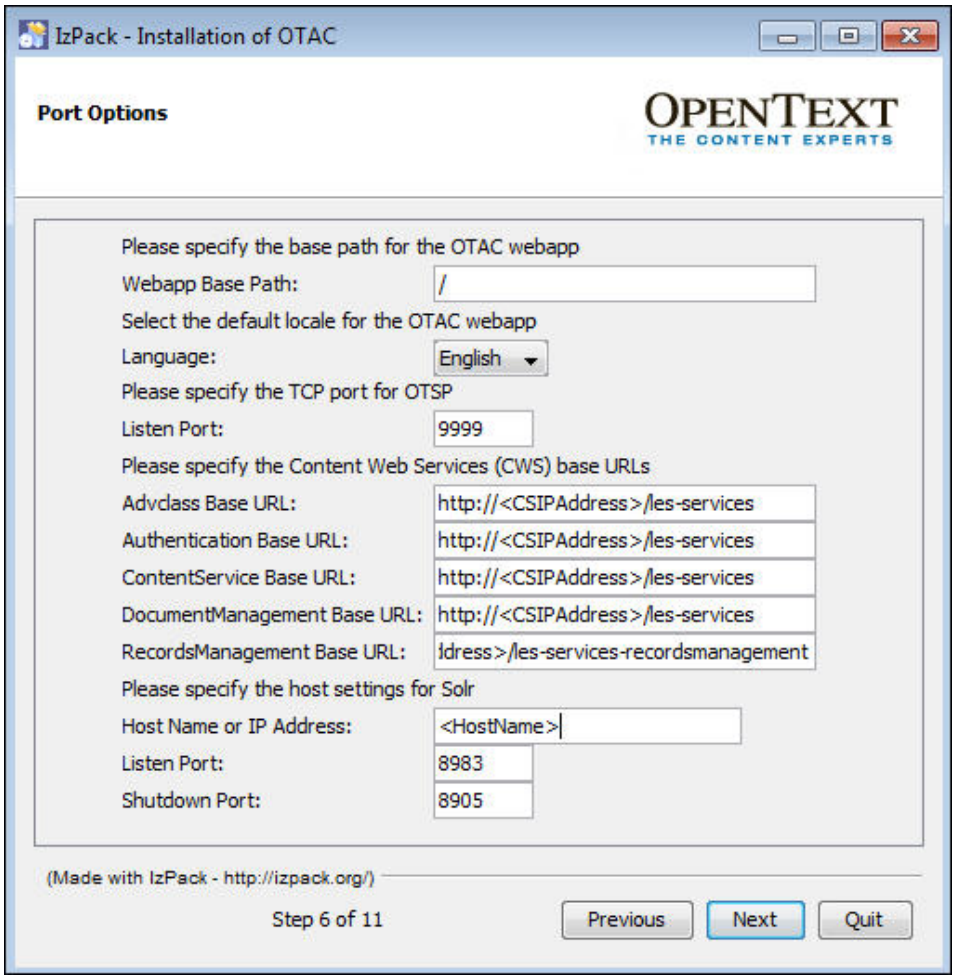
Tip: For more information about the parameters in the CWS Base URLs, see "Content Web Services (CWS) Base URLs Parameters" on page 15.

- In the **Hostname or IP** field, accept the default value, or type the Solr hostname or IP adress.

Note: The Solr hostname is typically the same as the computer on which OTAC is installed, but it can be configured as a separate host. Using the previous example, the Solr hostname would be `internalwebserver.company.com`, with the `http://` omitted.

The OTAC installer installs Solr on the same computer where OTAC is installed. If Solr is installed on a different computer, you must specify its location properly configure it to work with Auto-Classification. If you require assistance, please contact OpenText Customer Support.

- In the **Listen port** field, type the port number where Solr calls are sent.
- In the **Shutdown port** field, type the port number that is configured to stop Solr.



8. In the Startup Options window, select one of the following options, and then click **Next**:

   - **No**, which installs OTAC, but does not configure Windows services. When this options is chosen, the services must be manually started.
   - **Install**, which installs OTAC and configures the OTSP/OTAC and DCS components as Windows services, but does not start them.
   - **Install and Start**, which installs OTAC and configures the OTAC/OTSP and DCS components as Windows services and starts them.

   Note: The Solr component is not installed as a service. It must be manually started and stopped. For more information, see "To start Solr services:" on page 40.

   For more information about starting the other services, see "To start DC services:" on page 40, and "To start OTAC:" on page 40.

9. In the Summary Configuration Data window, verify that all parameters are correct, and then click **Next**.
10. In the Installation window, click **Next** when the installation is complete.
11. In the Perform External Processes window, click **Next**, and then click **Done**.

Note: When the OTAC installation is complete, you must install and start additional components and configure IIS. For more information, see "Configuring Windows for Auto-Classification" on page 22.

To install Auto-Classification using a Windows account without administration privileges:

1. On the **Start** menu, right-click the **Command Prompt** icon, and then choose **Run as Administrator**.
2. At the prompt, navigate to the directory where the OTAC distribution .jar file is located, and then type the following command:

   `java -jar otac-dist.jar`, where *otac-dist* represents the full name of the executable file.

   Note: This step assumes that Java is specified in the PATH environment variable. If an error message appears, you must add the directory of the Java Runtime executable to the Windows path.
3. Proceed with the installation steps, as described in "To install Auto-Classification on Windows:" on page 16.

2.2 Configuring Windows for Auto-Classification

After you complete the initial installation, you must complete the following steps, in the order they are provided, before Auto-Classification is ready for use:

- Ensure the required services and components are installed and started, as described in "Step 1 – Ensuring Required Services and Components are Installed and Running" on page 23.
- Configure the IIS Web server, as described in "Step 2 – Configuring the IIS Web Application Server" on page 24.

Note: The procedures provided in this chapter assume that OTAC is installed in the default installation directory: `C:\Program Files\OpenText\OTAC`.

2.2.1 Step 1 – Ensuring Required Services and Components are Installed and Running

The following services must be installed and running prior to configuring the IIS Web server and OTAC Web application server. For more information about starting, stopping, and adding services on Windows, see the section called "Starting, Stopping, and Installing Services on Windows" on page 23.

- **Solr**

  The OTAC installer does not install or start the Solr server as a service.

- **OpenText DCS**

  If the option was configured during the OTAC installation, OpenText DCS will already be running as a Windows service. If it was not added as a service during the installation process, you must add the service manually and then start it.

- **OTAC/OTSP**

  If the option was configured during the OTAC installation, OTAC/OTSP may already be running as a Windows service. If it was not added as a service during the installation process, you must add the service manually and then start it.

Starting, Stopping, and Installing Services on Windows

To manually start or stop Solr:

1. To start Solr, do the following:

   - On the command line, navigate to the following directory: `C:\Program Files\OpenText\OTAC\otsp\nlt\lucidworks`, type `lucidworks start`, and then press **ENTER**.

2. To stop Solr, do the following:

   - On the command line, navigate to the following directory: `C:\Program Files\OpenText\OTAC\otsp\nlt\lucidworks`, type `lucidworks stop`, and then press **ENTER**.

To manually add DCS service on Windows:

- On the command line, navigate to the following directory: `C:\Program Files\OpenText\OTAC\otsp\dcs-win\bin`, type `dcs-service install`, and then press **ENTER**.

  Note: If more than one instance of Auto-Classification is installed on the same computer, they will share the same instance of DCS; you do not need to install or start DCS more than one time.

  You should set the DCS service to auto-restart at all times.

To manually add OTAC/OTSP service in Windows:

- On the command line, navigate to the following directory: `C:\Program Files \OpenText\OTAC\otsp\bin`, type `otsp install`, and then press **ENTER**.

2.2.2 Step 2 – Configuring the IIS Web Application Server

Important

IIS, with PHP, must be installed prior to configuring it for use with Auto-Classification. For specific information on installing IIS on Windows, see the accompanying product documentation for IIS.

You must perform the following tasks, in the order they are provided, to configure IIS for use with Auto-Classification:

- Create a site for OTAC
- Create an additional directory for OTAC sessions files to be stored. For example, `C:\OpenText\OTAC\dashboard\sessions`.
- Modify the IIS Site to use the .phar extension
- Set up a rewrite rule for the Site
- Set up permission for IIS to write to the dashboard folder in OTAC
- Configure the Web application to allow access from outside of the server
- Start the Web application

To create a site for OTAC in IIS:

Caution

IIS 7.5 does not accept site names longer than 16 characters. You must create a new directory, as shown in Steps 1 and 2 in the following procedure before creating the site for OTAC.

1. In the IIS Manager Console, right-click the computer name, and then click **Add Web Site**.
2. On the Add Web Site dialog window, do the following:
   - In the **Site name** field, type `OTAC`.
   - Click the **Select** button, choose **DefaultAppPool**, and then click **OK** to select the Application pool.
   - In the **Physical Path** field, type: *`<OTAC_Installation_Path>`*`\dashboard`.
   - In the **Binding** section, choose **http** in the **Type** list, choose **All Unassigned** in the **IP Address** list, and enter the chosen OTAC port number (for example, `8888`) as the OTAC port number in the **Port** field.

- In the **Host name** field, enter the host name of the OTAC computer, which is the same as you entered for the *Solr* hostname during installation.

  Tip: You can find this value by typing `hostname` at the command prompt.

- Clear the **Start Web site immediately** check box, and then click **OK**.

To create a Sessions directory:

1. In the `<OTAC_Installation_Path>\dashboard` directory, create a `sessions` folder.
2. Give the IIS_IUSRS builtin group Read/Write permissions to the `sessions` directory.
3. Open the `php.ini` file for the OTAC Website, and modify the **session.save_path** parameter so that it points to the path where the `sessions` folder resides. For example, `C:\<OTAC_Installation_Path>\dashboard\sessions`.

   Note: The `php.ini` file can be located in the OTAC website, double-clicking the PHP Manager, and then selecting the link to the Configuration file.

4. Restart the OTAC Website in IIS.

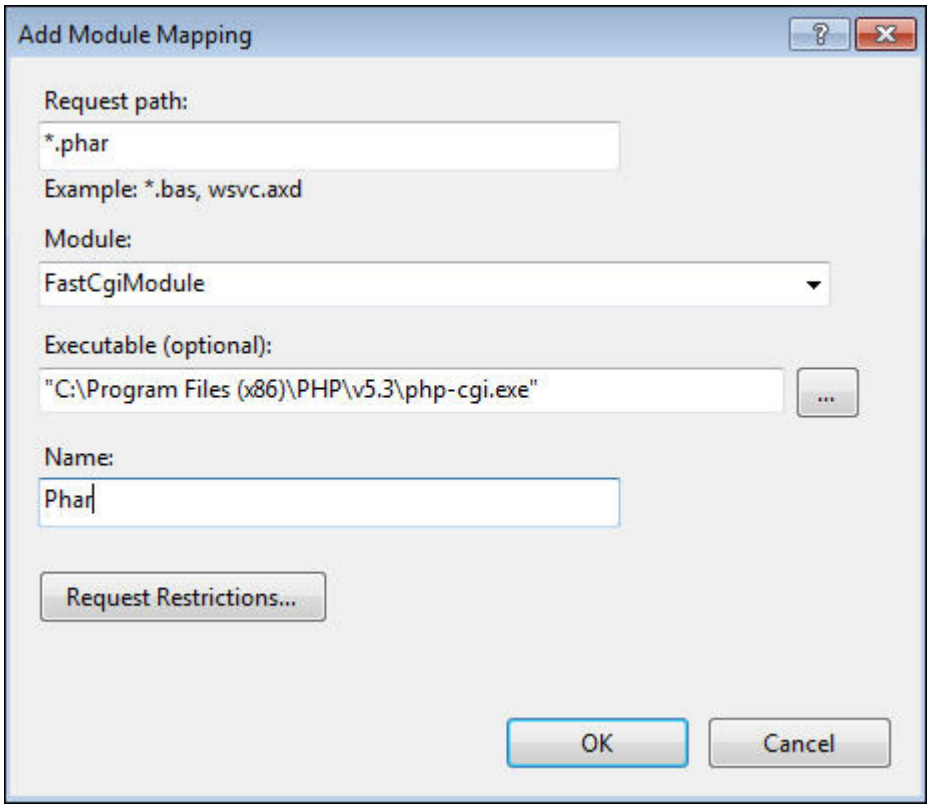
To modify the IIS Site to use the .phar extension:

1. In the IIS Manager Console, click the Site name in the **Connections** panel, and then double-click **Handler Mappings** in the **IIS** section of the main panel.
2. In the **Actions** panel, click the **Add Module Mapping** link.
3. In the Add Module Mapping dialog window, do the following:

   - In the **Request Path** field, type `*.phar`.
   - In the **Module** field, type `FastCgiModule`.
   - In the **Executable** field, type `C:\Program Files (x86)\PHP\v5.3\php-cgi.exe`, or browse to the location of the file.

     Note: You must include the quotation marks as shown. This path may be different if you have a different version of PHP installed, or it is installed in a different location.

   - In the **Name** field, type `Phar`.



4. Click the **Request Restrictions** button.
5. On the **Mapping** tab, select the **Invoke handler only if request is mapped to:** check box, select the **File or Folder** button, and then click **OK**.
6. Click **OK**.
7. In the FastCGI Application window, click **Yes**.

To set up a rewrite rule for the Site:

1. In the IIS Manager Console, click the Site name in the **Connections** panel, and then double-click **URL Rewrite** in the **IIS** section of the main panel.
2. In the **Actions** panel, click the **Add rule(s)** link.
3. In the Add Rule dialog window, highlight **Blank Rule**, and then click **OK**.

   Note: There are two **Blank Rule** options, you must highlight the Inbound Rule.

4. In the **Match URL** section of the Edit Inbound Rule panel, do the following:
   - In the **Name** field, type `OTAC Phar Rule`
   - Select **Does Not Match the Pattern** on the **Requested URL** drop-down list.

- Select **Regular Expressions** on the **Using** drop-down list.
- In the **Pattern** field, type `_common/js/languages/(.+)\.js$`.

5. In the **Action** section, do the following:
   - Select **Rewrite** on the **Action Type** drop-down list.
   - In the **Rewrite URL** field, type `./otac-webapp.phar`.
   - Select the **Append query string** check box.
6. Select the **Stop processing of subsequent rules** check box.
7. Click the **Apply** link in the **Actions** panel.

To allow IIS permission to write to the dashboard folder:

Note: This step ensures that the OTAC dashboard directory is readable, writeable, and executable by IIS. By default, the username for IIS is `IIS APPPOOL\DefaultAppPool`. If you upgraded from an earlier version of IIS, or have a customized IIS installation, the username may be different. Before you begin this procedure, ensure that you have the username used by IIS available.

You must also ensure that the `compiled` directory (`C:\<OTAC_Installation_Path>\dashboard\compiled`) is writeable.

1. Navigate to the `dashboard` directory used by OTAC, right-click the directory, and then click **Properties**. The `dashboard` directory is located at *<OTAC_INSTALLATION_Path>*`/dashboard`, where <*OTAC_INSTALLATION_Path*> is where you installed OTAC.
2. In the Properties window, click the **Security** tab, and then click the **Edit** button.
3. In the **Security** dialog window, click the **Add** button.
4. In the **Select Users, Computers, Service Accounts, or Groups** dialog window, click the **Locations** button, select the computer name, and then click **OK**.
5. In the **Enter the object names to select** field, type the name of the IIS user to whom you are granting the Write permission, click the **Check Names** button, and then click **OK** when the name becomes underlined. The default value is `IIS APPPOOL\DefaultAppPool`.
6. Highlight the new user in the **Group or user names** section, select the **Allow** check box for the *Modify* and *Write* permissions, click **Apply**, and then click **OK**.
7. Repeat steps 1–6, granting the user IUSR *Modify* and *Write* permission.

To allow access to the Web application from outside of the server:

Note: If you do not enable error messages, you will not be able to access the Web application from outside of the server.

1. In the IIS Manager Console, click the Site name, and then double-click **Error Pages** in the **IIS** section of the main panel.

2. In the **Actions** panel, click the **Edit Feature Settings** link.

3. In the **Error Responses** section of Edit Error Pages Settings dialog window, click the **Detailed errors** radio button, and then click **OK**.

To start the Web application:

1. In the IIS Manager Console, click the Site, and then click the **Start** link in the **Actions** panel.

2. Open a Web browser on the Windows server, and go to the Webapp Base URL, with the port number if one was specified, that you configured during the installation process.

3. Log in using your Content Server credentials.

2.3 Redeploying or Removing the OTAC Web Application or Services

When you install and configure OTAC and the Web application, you create a `web.config` settings file in the *<OTAC_Installation_Path>*`/dashboard` directory. If you delete the OTAC directory, you will also delete this file.

2.3.1 Redeploying OTAC Web Application

If you reinstall OTAC, you should backup the `web.config` file, reinstall OTAC, and then copy the file back to the *<OTAC_Installation_Path>*`/dashboard` directory.

Note: If you do not back up the web.config file, you will be required to perform the configuration steps each time you reinstall.

2.3.2 Redeploying or Removing OTAC/OTSP and DCS Services on Windows

The Open Text DCS and OTSP services can be created during the OTAC installation. If you reinstall OTAC to a different location, these services must be removed from Windows before you reinstall; otherwise, the installer will not reinstall the services.

To remove OTAC/OTSP Windows:

- On the command line, navigate to the following directory: `C:\Program Files \OpenText\OTAC\otsp\dcs-win\bin`, type `otsp remove`, and then press **ENTER**.

To remove DCS on Windows:

- On the command line, navigate to the following directory: `C:\Program Files \OpenText\OTAC\otsp\dcs-win\bin`, type `dcs-service uninstall`, and then press **ENTER**.

Note: If you set the DCS service to auto-restart at all times, you may have to manually stop the service before uninstalling it.

Chapter 3

Installing and Configuring Auto-Classification on Ubuntu Linux

Before you begin the installation process, ensure that all prerequisites are met, and you have the required information available as a reference. Use the Installation Worksheet in this guide to record the values you enter during the installation process. For more information, see "Installation Worksheets" on page 55.

3.1 Installing Auto-Classification on Linux

Solr and Document Conversion Service (DCS) are bundled and installed with OTAC. DCS is used to convert content from Content Server into a readable format; Solr is a search engine used by Auto-Classification. In the user interface, Solr is represented as the Auto-Classification Engine. Neither of these components require additional configuration, but you may need to start the services after the installation is complete.

Note: There are two ways to install Auto-Classification on Linux; either interactively as a Java GUI application, or using the `otac-install.xml` options file.

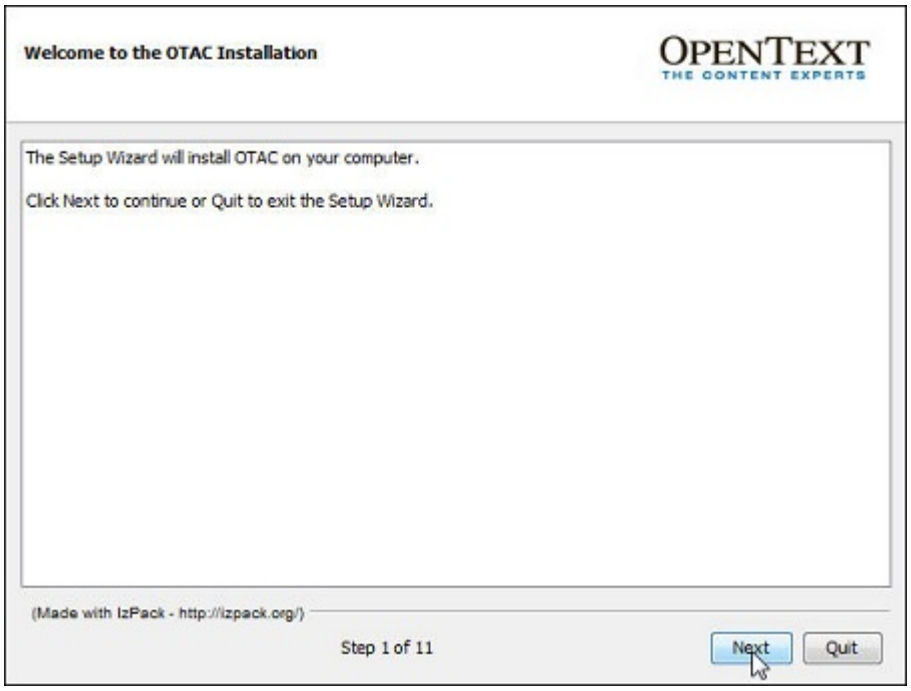
To install Auto-Classification on Linux as a Java GUI application:

1. Click to open the Auto-Classification executable `.jar` file, and then click **Run**.

   Note: Depending on how the JDK is configured on your computer, you may need to right-click the executable `.jar` file, and then click **Open with Sun Java 6 Runtime**. You can also run the installer from the prompt by navigating to the directory where the executable `.jar` file is located, and running the following command: `java -jar otac-dist-1.2-`*`<rcx>`*`-standard.jar`.

   In the Welcome to the OTAC Installation window, click **Next**.



2. In the License Agreement window, click **I accept the terms of this license agreement** button, and then click **Next**.

   Note: The <*OTAC_Installation_Path*> is a variable that is used throughout this guide. It refers to the directory where OTAC is installed. Anytime the <*OTAC_Installation_Path*> variable appears, it must be replaced with the actual directory where OTAC is installed.

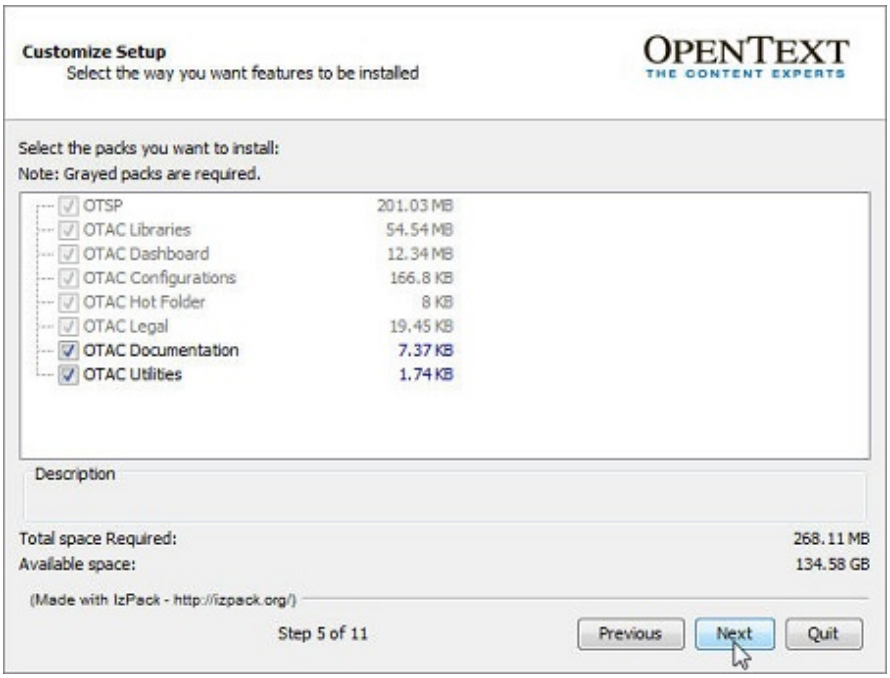
3. In the Destination Folder window, accept the default destination directory, or click **Browse** to select a different directory, and then click **Next**.

4. If the JDK Path window appears, click **Browse** to navigate to the directory where JDK is installed, and then click **Next**.

   Note: If you did a standard JDK installation and satisfied the prerequisites, this step will not appear.

5. In the Customize Setup window, select the check box for each component you want installed.

   Note: The required components are automatically selected and cannot be changed.



6. In the Port Options window, do the following, and then click **Next**:

   - In the **Webapp Base Path** field, type the path to the OTAC Web application that will be configured in the Web server. This should be set as `/`.

     Note: Be sure to note the **Webapp Base Path** in the Installation Worksheet. This is required when configuring Apache.

   - In the **Language** field, select a default language for the UI in the **Language** drop-down list.

     Note: The language can be changed later by each user from the UI.

   - In the **Listen port** field, accept the default port number, or type a new one for the TCP port where REST calls are sent.

   - In the **Content Web Services (CWS) base URLs** section, type the URL for the Web Services that OTAC uses to communicate with Content Server in the following format:

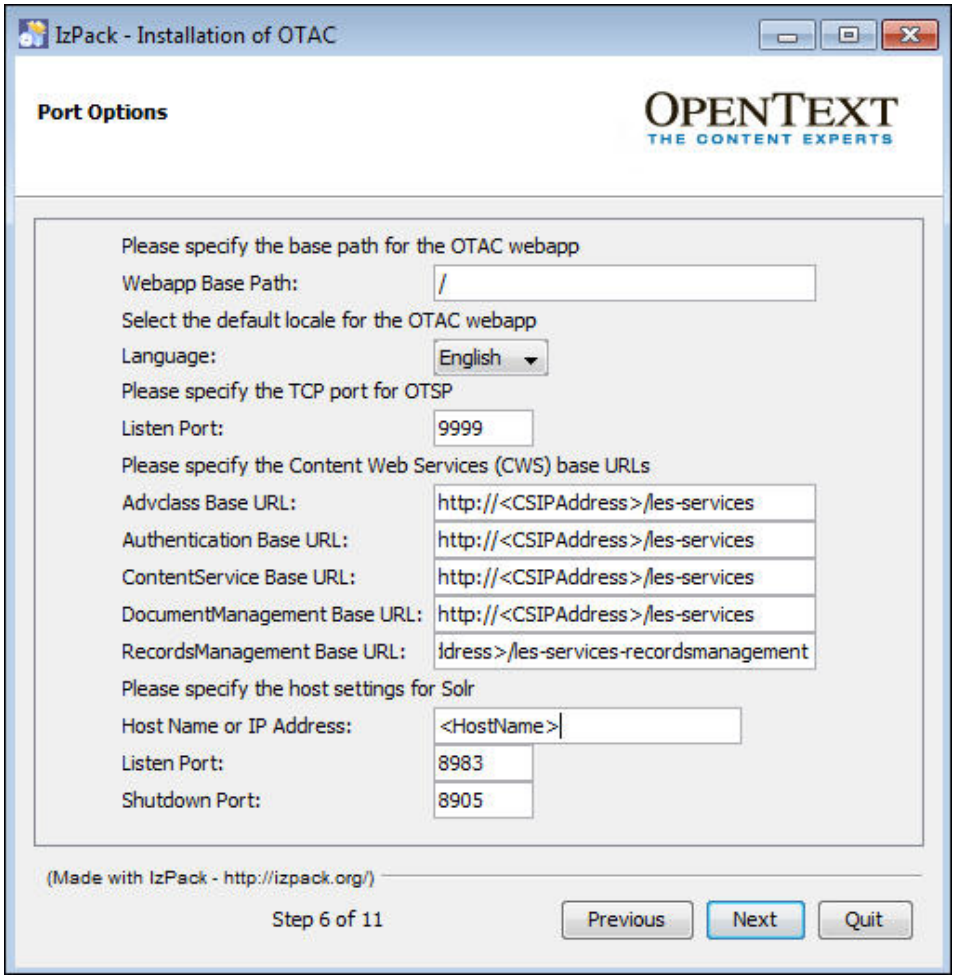
     `http://<host_name>:<port number>/<service_base_URL>` where *<host_name>* is the virtual host name, *<port number>* is the port number, and *<service_base_URL>* is the relative path to the web service installed on Content Server. For more information about the CWS base URLs, see "Content Web Services (CWS) Base URLs Parameters" on page 15.

   - In the **Hostname or IP** field, accept the default value, or type the Solr hostname or IP adress.

Note: The Solr hostname is typically the same as the computer on which OTAC is installed, but it can be configured as a separate host.

The OTAC installer installs Solr on the same computer where OTAC is installed. If Solr is installed on a different computer, you must specify its location and properly configure it to work with Auto-Classification. If you require assistance, please contact OpenText Customer Support.

- In the **Listen port** field, type the port number where Solr calls are sent.
- In the **Shutdown port** field, type the port number that is configured to stop Solr.



7. In the Startup Options window, select one of the following options, and then click **Next**:

   - **Install**, which installs OTAC without starting the services. If you select this option, you must manually start the DCS and OTSP/OTAC services.
   - **Install and Start**, which installs OTAC and starts the DCS and OTSP/OTAC services.

- **No**, which installs OTAC, but does not start DCS or OTSP/OTAC services. If you select this option, you must manually start the DCS and OTSP/OTAC services.

8. In the Summary Configuration Data window, verify that all parameters are correct, and then click **Next**.
9. In the Installation window, click **Next** when the installation is complete.
10. In the Perform External Processes window, click **Next**, and then click **Done**.

Note: When the installation is complete, you must configure the Web Application server, start or restart OTAC, and start the Solr and DCS services. For more information, see "Configuring Linux for Auto-Classification" on page 37.

To install Auto-Classification using the otac-install.xml file:

1. Open the `otac-install.xml` options file in an editor, and enter the values for the OTAC installation path and other required values: CWS base URLs, OTAC port, Webapp language, Solr ports and host.

   Example:

```
<?xml version="1.0" encoding="UTF-8" standalone="no"?>
<AutomatedInstallation langpack="eng">
<com.izforge.izpack.panels.HTMLInfoPanel id="WelcomePanel"/>
<com.izforge.izpack.panels.LicencePanel id="LicensePanel"/>
<com.izforge.izpack.panels.TargetPanel id="InstallTargetPanel">
<installpath>/opt/OpenText/OTAC</installpath>
</com.izforge.izpack.panels.TargetPanel>
<com.izforge.izpack.panels.JDKPathPanel id="JDKPathPanel"/>
<com.izforge.izpack.panels.TreePacksPanel id="FeaturesPanel">
<pack index="0" name="OTSP" selected="true"/>
<pack index="1" name="OTAC Libraries" selected="true"/>
<pack index="2" name="OTAC Dashboard" selected="true"/>
<pack index="3" name="OTAC Configurations" selected="true"/>
<pack index="4" name="OTAC Hot Folder" selected="true"/>
<pack index="5" name="OTAC Legal" selected="true"/>
<pack index="6" name="OTAC Documentation" selected="true"/>
<pack index="7" name="OTAC Utilities" selected="true"/>
</com.izforge.izpack.panels.TreePacksPanel>
<com.izforge.izpack.panels.UserInputPanel id="PortPanel">
<userInput>
<entry key="cws.base.url.authentication" value="http://
internalservices.company.com/les-services"/>
<entry key="cws.base.url.contentservice" value="http://
internalservices.company.com/les-services"/>
<entry key="cws.base.url.advclass" value="http://
internalservices.company.com/les-services"/>
<entry key="cws.base.url.recordsmanagement" value="http://
internalservices.company.com/les-services"/>
<entry key="cws.base.url.documentmanagement" value="http://
internalservices.company.com/les-services"/>
```

```
<entry key="otac.port" value="9999"/>
<entry key="webapp.locale" value="en"/>
<entry key="solr.port" value="8983"/>
<entry key="solr.shutdown" value="8905"/>
<entry key="solr.host" value="localhost"/>
<entry key="webapp.basepath" value="/"/>
</userInput> </com.izforge.izpack.panels.UserInputPanel>
<com.izforge.izpack.panels.UserInputPanel id="StartupPanel">
<userInput> <entry key="otsp.service" value="none"/>
</userInput>
</com.izforge.izpack.panels.UserInputPanel>
<com.izforge.izpack.panels.SummaryPanel id="SummaryPanel"/>
<com.izforge.izpack.panels.InstallPanel id="InstallPanel"/>
<com.izforge.izpack.panels.ProcessPanel id="ProcessPanel"/>
<com.izforge.izpack.panels.FinishPanel id="FinishPanel"/>
</AutomatedInstallation>
```

2. At the prompt, navigate to the directory where the executable `.jar` file and the xml options files is located, and then run the following command: `java -jar otac-1.2-<rcX>-standard.jar otac-install.xml`.

Note: When the installation is complete, you must configure the Web Application server, start OTAC, and start the Solr and DCS services. For more information, see "Configuring Linux for Auto-Classification" on page 37.

3.2 Configuring Linux for Auto-Classification

After you install OTAC, you must do the following before you can use Auto-Classification:

- Configure the Web Application OTAC, by performing the procedures in this section, in the order they appear.
- Configure Apache and PHP. For more information, see "To enable permissions for Apache to modify Web Application directories:" on page 38 and "To increase the PHP Memory limit:" on page 38.
- Start the Solr, DCS, and OTSP/OTAC services. For more information, see "To start Solr services:" on page 40, "To start DC services:" on page 40, and "To start OTAC:" on page 40.

When the configuration steps are complete, you can access OTAC at `http://<hostname>:<webapp_port>/<Webapp_Base_Path>`, which was specified by the Webapp Base parameter during the installation process.

To increase the Files Limit:

Note: You must ensure the maximum number of open files per user is large enough to accommodate Auto-Classification; the default value of 1024 is not sufficient.

1. Change the value of the file limit parameter in the `limits.conf` file (`/etc/security/limits.conf`) to the following:

```
* - nofile 65000
```

2. Save and close the file.

To set up Symlinks for the libtiff component of Linux:

1. Ensure that the `libtiff` component of Linux is installed.
2. At the prompt, navigate to the following directory:

   <OTAC_Installation_Path>`/otsp/dcs/lib`
3. Run the following command: `sudo ln -s /usr/lib/libtiff.so.4 libtiff.so.3`

To ensure that PHAR Extension is enabled in Apache:

1. Open the `php5.conf` file (`/etc/apache2/mods-available/`), and add the following line to the end of it:

   ```
   AddHandler application/x-httpd-php .phar
   ```

   Note: This step is not required when the above line is already in the file.
2. Save and close the file.

To increase the PHP Memory limit:

1. Change the value of the **memory_limit** parameter in the `php.ini` file (`/etc/php5/apache2/`) to the following:

   ```
   memory_limit = 512M
   ```
2. Save and close the file.

Ensure that the mod_rewrite is properly mapped:

- At the prompt, run the following command:

  ```
  ln -s /etc/apache2/mods-available/rewrite.load /etc/apache2/mods-enabled/rewrite.load
  ```

To enable permissions for Apache to modify Web Application directories:

1. The installation path of the dashboard (<*OTAC_Installation_Path*>/dashboard) and all files/subdirectories underneath needs to be readable and executable by the Apache user (<*apache-user*>) and the Apache group (<*apache-group*>). By default the Apache user and group are set to `www-data`.
2. Execute each of the following commands at the prompt, in the following order:

   ```
   sudo chown -R <apache-user>:<apache–group>
   <OTAC_INSTALLATION_DIRECTORY>/dashboard
   ```

   ```
   sudo chmod ug=rx -R <OTAC_INSTALLATION_DIRECTORY>/dashboard
   ```

```
sudo chmod ug+w -R <OTAC_INSTALLATION_DIRECTORY>/dashboard/cache

sudo chmod ug+w -R <OTAC_INSTALLATION_DIRECTORY>/dashboard/
compiled

sudo chmod ug+w -R <OTAC_INSTALLATION_DIRECTORY>/dashboard/logs

sudo chmod ug+w -R <OTAC_INSTALLATION_DIRECTORY>/dashboard/
_common/js/languages
```

To configure the Web Application Base Path:

Note: Ensure that you have the Installation Worksheet available for reference when you perform this procedure.

1. Open the `app.ini` file (`<OTAC_Installation_Path>/dashboard/config/`), and locate the `basepath` parameter.
2. Change the `basepath` parameter to the following:

   ```
   basepath="<Webapp Base Path>"
   ```

   Note: This parameter must be the same as the Webapp Base Path parameter that was specified during the OTAC installation.
3. Save and close the file.

To configure the Apache Web Application Server:

1. Create a text file called `otac` in the following directory:

   ```
   /etc/apache2/sites-available/
   ```
2. Add the following virtual host entry to the text file:

   ```
   <VirtualHost *:8888>
     DocumentRoot <OTAC_INSTALLATION_DIRECTORY>/dashboard
     <Directory <OTAC_INSTALLATION_DIRECTORY>/dashboard>
       Options all
       AllowOverride all
       Order allow,deny
       Allow from all
     </Directory>
   </VirtualHost>
   ```
3. Navigate to `/etc/apache2/sites-available/`, and then type the following command at the prompt:

   ```
   sudo a2ensite otac
   ```
4. Open the `/etc/apache2/ports.conf` file, and add the following lines:

   ```
   NameVirtualHost *:8888

   Listen 8888
   ```
5. Restart the Apache Web server.

Tip: You can restart the Apache Web server by typing the following at the prompt: `sudo /etc/init.d/apache2 restart`.

To start Solr services:

- Navigate to the `<OTAC_Installation_Path>/otsp/nlt/lucidworks` directory, and then type the following at the prompt:

  `./lucidworks.sh start`

To start DC services:

- Navigate to the `<OTAC_Installation_Path>/otsp/dcs/bin` directory, and then type the following at the prompt:

  `./dcsctl.sh start`

  Note: `otsp.sh` includes the commands to start or stop DCS. DSC will start or stop automatically when starting or stopping OTSP.

To start OTAC:

- Navigate to the `<OTAC_Installation_Path>/otsp/bin` directory, and then type the following at the prompt:

  `./otsp.sh start`

Tip: To ensure OTAC is ready for use, allow OTAC to run for a few seconds, then navigate to the following directory: *`<OTAC_Installation_Path>`*`/otsp/logs`, and then open the `otsp.wrapper.log`. The last line should read "Classification Tree has been successfully updated."

Note: Your computer is now configured to run Auto-Classification. You can access the application at `http://`*`<host-name:port/>`*, which was specified during the OTAC installation.

Chapter 4

Configuring Content Server and Modules for Use with OTAC

To use OTAC with Content Server, Content Server must be configured with a minimum set of modules and users, as described in this chapter.

4.1 Adding Users

OTAC requires, at a minimum, one specific user added and configured in both Content Server and OTAC. OTAC user authentication is delegated to Content Server, which means that users will sign in to OTAC with the same credentials they use to sign in to Content Server. Users must have the proper permissions on the data in Content Server in order to create Models from it, or to auto-classify it. For more information about creating users and groups in Content Server, see *Working with Users and Groups* in the *Content Server User Online Help*.

To create the OTAC user in Content Server:

Note: You must have the Add User privilege to create new users in Content Server.

1. Sign in to Content Server.
2. From the Global Menu bar, choose **Users & Groups** on the **Enterprise** menu.
3. On the **Users and Groups** page, choose **User** on the **Add Item** menu.
4. On the **Content Server Create User** page, type a unique log-in name and password for the user in the appropriate fields.
5. Optional Specify any of the additional information about the user in the **First Name**, **Middle Initial**, **Last Name**, **Title**, **E-mail**, **Phone**, **Fax**, and **Office Location** fields.
6. Optional To set the language that will appear for this user, click a language in the **Preferred Language** list. The **Preferred Language** list will only appear if multiple language selections are available on your system.
7. Optional To specify a time zone for the user, click a time zone in the **Time Zone** list.
8. In the **Privileges** section, ensure that the following check boxes are selected:
   - **Log-in enabled**
   - **Public Access enabled**
   - **Can create/modify users**

- **Can create/modify groups**
- **User administration rights**
- **System administration rights**

9. Click **Submit**.

To create the OTAC user in Auto-Classification:

1. Open the `source-config.xml` file in a text editor. The `source-config.xml` file is located in the *<OTAC_HOME>*`/otsp/etc` directory.
2. Change the values for the following parameters to match the log-in credentials of the Content Server OTAC user:
   - <*field name="user"*>
   - <*field name="password"*>

   Example: If the Content Server user name and password is `OTACRecordsManager/!OTACrm123`, the parameter values should appear as follows:

```
<field name="user">
  <value>OTACRecordsManager</value>

<field name="password">
  <value>!OTACrm123</value>
```

   Note: The log-in name and password you specify must match the log-in name and password of the Content Server user.
3. Save and close the file, and then restart the OTSP server.

4.2 Configuring the OpenText Advanced Classification Module

You must ensure that the proper Auto-Classification setting is configured in the Advanced Classification module in Content Server. One of the following options must be specified on the Managed Objects page in Content Server:

- **Replace** – If items in Content Server already have an assigned Classification, the Classification provided by Auto-Classification will overwrite the manually assigned Classification in Content Server.

  Note: This setting should be used with caution. If the item does not have a manually assigned Classification in Content Server, the Classification provided by Auto-Classification will be stored in Content Server.
- **Augment** – If the item in Content Server already has an assigned Classification, the Classification provided by Auto-Classification will be added as a secondary Classification, if the settings of the Classifications module and the RM Classifications module allow multiple Classifications. If an item does not have an

assigned Classification, the Classification provided by Auto-Classification will be assigned.

Note: The **Augment** option should be used to preserve the maximum amount of data.

- **Preserve** – If the item in Content Server already has an assigned Classification, the Classification provided by Auto-Classification will be ignored and no changes are made. If an item does not have an assigned Classification, the Classification provided by Auto-Classification will be assigned.

To configure Advanced Auto-Classifications in Content Server:

Important

When you configure Content Server with the Advanced Auto-Classifications module, you must manually change some of the file locations. To do this, copy the files from the *<C:|ContentServer_Installation_Directory>*`\module\advclass_10_0_0\webservices\dotnet\advclass` directory to the *<C:|ContentServer_Installation_Directory>*`\webservices\dotnet` directory, remove all of the `.dll` files, except for the `Advclass.dll` file, from the *<C:|ContentServer_Installation_Directory>*`\webservices\dotnet\advclass\bin` directory, and then copy all of the `.dll` files, except for the `DocMan.dll` and `ContentService.dll` files, from the *<C:|ContentServer_Installation_Directory>*`\webservices\dotnet\les-services\bin` directory to the *<C:|ContentServer_Installation_Directory>*`\webservices\dotnet\advclass\bin`.

1. In the **Advanced Auto-Classifications Administration** section of the Content Server Administration page, click the **Managed Objects** link.
2. On the Managed Objects page, select the **Managed** check box for each Content Server object type that you want to allow Auto-Classification to automatically classify.

   Notes

   - Even if a subtype on the Managed Objects page is selected as classifiable, OTAC will still filter out the non-versioned objects.
   - When selecting an object type on the Managed Objects page as classifiable, ensure that the node type is also configured in the *<OTAC_Installation_Path>*`/otsp/etc/mule/otsp-providers/classification-provider.xml`.
3. In the **How should auto classification affect manual/inherited classifications?** section, click one of the following radio buttons:

   - **Replace**
   - **Augment**

- **Preserve**

4. Click the **Update** button.

4.3 Enabling RM Classifications

Important

When you configure OTAC with Records Management, you must manually change some of the file locations. To do this, copy the files, except for the `DocMan.dll` and `ContentService.dll` files, from the *<C:|ContentServer_Installation_Directory>*`\webservices\dotnet\les-services\bin` directory to the *<C:|ContentServer_Installation_Directory>*`\webservices\dotnet\les-services-recordsmanagement\bin` directory.

If you want to allow multiple RM Classifications per document, you must enable multiple RM Classifications in Records Management.

To enable multiple RM Classifications:

1. In Content Server, click **Records Management** on the **Enterprise** menu.
2. In the Records Management workspace, click the **Records Management Administration** link.
3. On the Records Management Administration page, click the **System Settings** link, and then click the **RM Settings** tab.
4. In the **Multiple Classifications** section, click **Yes**, and then click **Submit**.

4.4 Configuring Classifications that OTAC can Assign

For OTAC to assign a Classification, you must edit the Classification in Content Server to accept Auto-Classification. If the Classification's parameter is not changed, and left as **Manually assigned**, OTAC cannot set the Classification in Content Server, and it will be ignored even if the settings are specified to allow it to be written. This is a security measure to ensure a proper and systematic workflow when you transition each Classification from a manual Records Management process to an automated approach.

To enable Classifications in Content Server to accept Auto Classifications:

1. In Content Server, click **Classifications** on the **Enterprise** menu.
2. Click the RM Classification's **Functions** menu, click **Properties**, and then choose **Extras**.
3. In the **Management Type** section of the **Extras** tab, click the **Advanced Auto** radio button, ensure the **Selectable** option is selected, and then click **Submit**.

4.5 Migrating the AdvClassRequests Table

If you made a backup copy of the `AdvClassRequests` table from a previous version of Auto-Classification, it must be migrated to the new location in OTAC.

To migrate the AdvClassRequests table into Content Server Advanced Auto-Classifications:

1. Type `$>cd <OTAC_1.3_HOME>` at the prompt.
2. Open the `advClassMigration.properties` file. The advClassMigration.properties file is located in the `<OTAC_1.3_HOME>otsp/etc/tools/advclass-migration/` directory.
3. Locate the **advclas.tableName.old** parameter, and type the location for the AdvClassRequests table.
4. Type one of the following commands at the prompt to start the migration tool:
   - On **Windows**, type the following: `$>bin\advclass-migration.bat`
   - On **UNIX**, type the following: `$>bin/advclass-migration.sh`

Tip: You can set the location for the backup of the AdvClassRequests table. For example:
`$>bin/advclass-migration.bat -Dadvclass.tableName.old=cs.AdvClassRequestsBackup`

Chapter 5

Understanding Security in OTAC

OTAC does not enforce its own security policies; user authentication and authorization is delegated to the associated Content Server instance.

User Authentication

The following rules apply to user authentication in OTAC:

- All Auto-Classification users are also Content Server users.
- When users sign into Auto-Classification, the Auto-Classification server requests authentication for the users from the associated Content Server instance. This behavior implies that users can only sign into Auto-Classification using credentials that are valid on the associated Content Server instance.

User Authorization

The following rules apply to user authorization in OTAC:

- All Auto-Classification users have the same permissions within Auto-Classification.
- All users have access to the content that is stored in Auto-Classification, including cached Classification Trees and previously ingested Model Exemplars and Review documents.
- All users signed in to Auto-Classification can do the following:
  - Create a Model, Review, or Job.
  - Modify and delete Models, Reviews, and Jobs created by other users, as long as the item is not currently being used.
- Start or Stop the Ongoing Classification process, or select a Model to be used for an Ongoing Classification.

  Note: User permissions for Ongoing Classifications are controlled by Content Server. The Ongoing Classification process will only auto-classify content for which the user who started the process has both the See/See Contents and Modify permission. Ongoing Classifications should only be started or stopped by users who have maximum content access privileges (for example, users with the System Administration privilege).

  Documents that are retrieved by the Ongoing Classification process for which the invoking user does not have the Modify permission will be permanently removed from the auto-classification request queue maintained by the module. This behavior implies that the document in

question will never be auto-classified even if the Ongoing Classification process is stopped and restarted by a user with the proper permissions.

- When accessing items in Content Server, Auto-Classification users retain the permissions assigned to them in Content Server. This behavior implies that users can:
  - Create a Model only using Exemplars for which they have the See/See Contents permission in the associated Content Server instance.
  - Create a Review only using documents for which they have the See/See Contents permission in the associated Content Server instance.
  - Create a Classification Job only using documents for which they have both the See/See Contents and Modify permissions within Content Server. The Modify permission on a document is required for Auto-Classification to assign a new Classification to the document in Content Server.

Chapter 6

Configuring OTAC Performance Parameters and Default Settings

This chapter includes information about configuring backend performance parameters and default settings in OTAC.

6.1 Configuration Parameters

The following table provides a description for the parameters you can manually configure in OTAC. To change the configuration parameters, you must open the `.xml` file in a text editor, make the changes, and then save the file.

Table 6-1: OTAC Configuration Parameters

File Name	File Location (Default)	Description
`update-agent-router.xml`	`../otsp/etc/mule/`	Specifies the minimum/maximum number of Exemplars and Test Documents per Classification, and the minimum number of documents for Precision and Recall.
`persistence-config.xml`	`../otsp/etc/`	Specifies the Retention Rules for Job documents.
`filter-config.xml`	`../otsp/etc`	Lists the supported MIME types.
`dcs-fields-mapping.xml`	`../otsp/etc/`	Lists the field mappings for supported MIME types.
`source-config.xml`	`../otsp/etc/`	Specifies the Content Server WebServices URL and OTAC user credentials.
`batch-document-provider.xml`	`../otsp/etc/mule/otac-providers/`	Specifies the maximum number of documents to be kept in the index.
`model-exemplar-provider.xml`	`../otsp/etc/mule/otac-providers/`	Specifies the maximum number of Exemplars to be ingested per Classification.
`content-provider.xml`	`../otsp/etc/mule/otac-providers/`	Specifies the maximum number of nodes to display in a folder view.

similarity-manager.xml	../otsp/etc/mule/otsp-managers/	Specifies the threshold number of characters for similarity on large documents.

6.2 Performance Tuning

This section describes the parameters for OTSP and OTAC that you can modify to increase the performance level of OTAC.

6.2.1 Tuning OTSP Parameters

Content Tree Traversing

The number of parallel threads used to browse Content Server should be as low as possible.

Parameter	Recommended Setting:
active-threads	4
idle-threads	10
polling-interval	250 (ms)
max-retries	2

Download

Parameter	Recommended Setting:
active-threads	8
idle-threads	10
polling-interval	200 (ms)
max-retries	2

Conversion

The Conversion component is the largest time consumer, and should have the largest resource allocation.

Parameter	Recommended Setting:
active-threads	16
idle-threads	50
polling-interval	100 (ms)
max-retries	2
conversion-timeout	10

Note: The `conversion-timeout` parameter can drastically impact performance. This parameters ensures that DCS does not spend more time than necessary processing a document.

Use caution when changing the `conversion-timeout` parameter, setting this to a value that is to low can cause DCS to always reject all incoming requests. For more information, see the section called "DCS" on page 51.

DCS

Parameter	Recommended Setting:
`NumThreads`	`16`
`QueueSize`	`1000`

The `QueueSize` parameter represents the maximum number of entries for the documents pool used by DCS to store new requests. When the `QueueSize` reaches its capacity, DCS will reject additional incoming requests.

6.2.2 Tuning OTAC Parameters

Consumers Queue

The Consumers Queue parameter allows you to control the number of parallel documents that are ingested and processed by OTAC.

Parameter	Recommended Setting:
`polling-frequency`	`500 (ms)`
`maxActive`	`16`
`maxIdle`	`100`

Documents Buffer

OTAC builds a buffer of documents; when the buffer reaches a configurable capacity, the batch of documents is sent to SOLR. The `buffer-capacity` parameter has a substantial impact on overall performance. The recommended value for the `buffer-capacity` parameter is `500`.

6.3 Configuring Timeout Settings

The timeout values control how long OTAC waits to receive a valid connection to Content Server and DCS Services. The default value is 1 minute for each of the service connection types.

6.3.1 Content Server Classification Tree Traversal

- **File:** `<OTAC_HOME>/otsp/etc/mule/download-manager.xml`
- **Line:** 31
- **Default:** 60000 ms
- **XML:** *<spring:property name="serviceTimeOut" value="60000" />*

6.3.2 Content Server Content Downloading

- **File:** `<OTAC_HOME>/otsp/etc/mule/download-manager.xml`
- **Line:** 45
- **Default:** 60000 ms
- **XML:** *<spring:property name="serviceTimeOut" value="60000" />*

6.3.3 Content Server Monitor

- **File:** `<OTAC_HOME>/otsp/etc/mule/download-manager.xml`
- **Line:** 66
- **Default:** 60000 ms
- **XML:** *<spring:property name="serviceTimeOut" value="600000" />*

6.4 Content Server Server Monitor

This timeout setting controls how long the Content Server server monitor waits for a valid connection. This timeout value should have a slightly larger value than the previous tiemout values. The default value is 2 minutes.

- **File:** `<OTAC_HOME>/otsp/etc/mule/cs-server-monitor.xml`
- **Line:** 28
- **Default:** 120000 ms
- **XML:** *<spring:property name="serverPingTimeOut" value="120000" />*

6.5 Processor TimeOuts

The following timeouts control how long OTAC waits on sub-tasks during periods of inactivity. The default is 2 minutes for each processor type. In general, these timeouts should be slightly longer than the previous timeouts.

6.5.1 Batch Document Processor

- **File:** `<OTAC_HOME>/otsp/etc/mule/otac-providers/batch-document-provider.xml`
- **Line:** 26
- **Default:** 120 sec
- **XML:** *<spring:entry key="processor-timeout" value="120" />*

6.5.2 Model Exemplar Processor

- **File:** `<OTAC_HOME>/otsp/etc/mule/otac-providers/model-exemplar-provider.xml`
- **Line:** 26
- **Default:** 120 sec
- **XML:** *<spring:entry key="processor-timeout" value="120" />*

6.5.3 Ongoing Processor

- **File:** `<OTAC_HOME>/otsp/etc/mule/otac-providers/ongoing-provider.xml`
- **Line:** 35
- **Default:** 120 sec
- **XML:** *<spring:entry key"processor-timeout" value="120" />*<!-- seconds -->

Chapter 7

Installation Worksheets

This section contains worksheets you can use to record passwords, installation directory locations, and other parameters you will need to know when configuring the supporting software.

Table 7-1: Installation Worksheets for the OTAC Installer

Parameter	Default Value	Suggested Value (Linux)	Your Information
OTAC root installation directory	C:\Program Files \OpenText\OTAC	/opt/OpenText/OTAC	
JDK Path	C:\Program Files \Java\jdk1.6.0_35	/usr/lib/jvm/ jdk1.6.0_35	
Webapp Base Path	http://HOSTNAME: 8888/	http://HOSTNAME: 8888	
TCP Port for OTSP	9999	9999	
Content Web Services Base URL	http:// *<Content_Server_Name>*/ *<Web_Service_Name>*	http:// *<Content_Server_Name>*/ *<Web_Service_Name>*	
Solr Host Settings: Host Name or IP	*<Solr_server_Hostname>*	*<Solr_server_Hostname>*	
Solr Host Settings: Listen Port	8983	8983	
Shutdown Port	8905	8905	