opentext™

Transport

OpenText™ Content Server

This document is part of the Content Server User Online Help documentation list. If conflicts exist, the Online Help supersedes this document.

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OpenText™ Content Server
LLESTRP210200-UGD-EN-01
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Chapter 1

Working with Transport

The Transport feature allows you to package items from your current instance of Content Server (the *source system*), download them as a ZIP file, and then import and deploy them to a different instance of Content Server, (the *target system*).

Transport has a dedicated workspace in Content Server, called the *Transport Warehouse*. The Warehouse contains tools that allow you to work with Content Server items and prepare files to be exported and deployed to the target system.

Items that are added to a Warehouse, changed, or transported and deployed to a target system are included in the audit trail. The users that perform the tasks are also tracked, and can be viewed based on the specific user or by role. Auditing information for Transport items is shown on the item's Properties pages. For information about Properties pages for Content Server items, see *OpenText Content Server - Get Started (LLESRT-UGD)*.

1.1 Access Levels in Transport

The Transport tasks that you can perform vary according to your access level.

Transport Participants

The Transport functionality that is available to you depends upon the access you have been given. It differs depending on whether you are a System Administrator, a Warehouse Manager, or a Content Server user with access to the Transport Warehouse.

For more information about Content Server permissions and privileges, see *OpenText Content Server - Get Started (LLESRT-UGD)*.

Content Server Administrator
A Content Server Administrator (a user that has the **System administration rights** privilege) has primary control over Content Server, and can perform many tasks that standard users cannot. A Content Server Administrator can grant users the **Warehouse Manager** usage privilege and provide access to the Transport Warehouse.

Warehouse Manager
A Warehouse Manager is a Content Server user that has the **Warehouse Manager** usage privilege and sufficient permissions to manage the Transport Warehouse.

Users that have the **Warehouse Manager** usage privilege see a **Transport Warehouse** item in the **Enterprise** menu. They can import and export Transport Packages, edit the Dependencies of Transport items to make them deployable,

and deploy Transport items from a Workbench to a target Content Server deployment.

> 💡 **Tip:** The **Warehouse Manager** usage privilege is assigned to the **Business Administrators** group by default.

A Warehouse Manager is responsible for managing the Transport items that are imported from other Content Server deployments or exported to other Content Server deployments. Typically, Warehouse Managers can see all Workbenches and perform all functions in the Transport Warehouse, including creating Transport Packages. In practice, the specific items that they can access within the Transport Warehouse depend on the permissions that they have.

Content Server user

As a Content Server user, you may have limited access to some areas of the Warehouse. The areas that you can access depend on your permissions. For example, you may have access to the Workbenches in the Transport Warehouse, but no access to the **Transport Packages** container.

Transport Tasks and Access Levels

The following table lists common Transport tasks and the users that can perform them, and provides links to detailed information on the task.

> 📄 **Note:** Content Server administrators can perform any of the following tasks.

Transport task	User that can perform the task	More information
Assign Roles to Content Server Users.	• Content Server Administrator	"Transport Participants" on page 5
Create and Delete a Workbench.	• Warehouse Manager • User with adequate permission to the Transport Warehouse	"Create a Workbench" on page 12
Add Content Server items to and delete Transport items from a Workbench.	• Warehouse Manager • User with adequate permission to the Workbench	"To Add an Item to a Workbench" on page 13
Add Transport items from a Workbench to a Transport Package.	• Warehouse Manager • User with adequate permission to the Workbench	"The Transport Workbench" on page 12

Transport task	User that can perform the task	More information
Download the Transport Package from the source system to an external location.	• Warehouse Manager • User with adequate permission to the **Transport Packages** volume	"To Download a Transport Package" on page 19
Add a Transport Package to the Warehouse on the target system.	• Warehouse Manager • User with adequate permission to the **Transport Packages** volume	"To Import a Transport Package" on page 19
Unpack a Transport Package to a Workbench.	• Warehouse Manager • User with adequate permission to the **Transport Packages** volume and to the Workbench	"To Unpack a Transport Package to a Workbench" on page 20
Analyze items on the Workbench that are ready for deployment, and edit item Dependencies.	• Warehouse Manager	"Deploy a Transport Package on a Target System" on page 21
Deploy the Transport items in a Workbench on a target system.	• Warehouse Manager	"Deploy a Workbench" on page 17

1.2 Transportable Items

Numerous types of Content Server items are transportable, including all of the item types listed below. Refer to the notes for each type regarding special considerations for transport and deployment.

When you deploy any item type in a target system, you must ensure that all of its Dependencies are satisfied. For more information on Dependencies, see "Transport Prerequisites and Dependencies" on page 21 and "Verify and Edit Dependencies" on page 23.

Table 1-1: Transportable Item Types

ITEM TYPE	NOTES
Accession Search	See Disposition Search note.
Category	
Category Folder	

ITEM TYPE	NOTES
Classification	Includes Records Management Classifications and Records Management Folders. If a Classification or RM Classification is transported and deployed, and the Classification already exists on the target system, the metadata for that Classification will be updated in the target system. A new object will not be created.
Community	
Compound Document	Includes Releases and Revisions. When Compound Documents are added to the Warehouse, Releases and Revisions are included.
Custom View	
Disposition Search	Metadata that is included on the **Specific** and **Settings** tabs will automatically get created if it does not already exist at the time of transport. Metadata that will be transported includes: Accession, Stage, RSI and RSI Status, New Status, Container, Advanced Search Query, Notification: Recipients, Review Process: First Set of Reviewers, and Review Process: Second Set of Reviewers.
Document	
Facet	
Facet Folder	
Folder	
Form	
Form View	A Form View cannot be transported on its own. It can be transported only within a Form Template. If you add a folder to the Warehouse that contains a Form Template that includes Views, the Form Template may appear in the Unsupported Objects list even though it was added to the Workbench.
Form Template	
Milestone	
Permission	Items that are transported are deployed with permissions assigned, provided users are properly mapped from the source to the target system.

ITEM TYPE	NOTES
Perspective	Your system may include either ActiveView-type Perspectives or the new Perspective node-type Perspectives. Perspective-node type Perspectives can be transported to a target system that similarly uses Perspective node-type Perspectives but cannot be transported to a system that uses ActiveView-type Perspectives. ActiveView-type Perspectives can be transported to a target system that similarly uses ActiveView-type Perspectives, but cannot be transported to a system that contains Perspective node-type Perspectives. To transport ActiveView-type Perspectives to a target system that uses Perspective node-type Perspectives, you must first convert the ActiveView-type Perspectives on the source system to use the new Perspective node type before transporting them to the target system. For more information about how to convert ActiveView-type perspectives, see [xref to non-existent element "llesav-agd.av-persp-convert.bg"].
Physical Object	Includes the Physical Object's metadata. You can also transport Physical Object system settings. For more information, see *OpenText Content Server - Physical Objects (LLESPOB-UGD)*. Note that if you transport a Physical Item Type that has a label, and the target system does not have that same label, the transport will fail and a message will appear in the status column.
Project	
Records Management items	Includes Record Types that are assigned to items being transported. If the managed item already exists on the target system, the metadata for that managed item, which appears on the **Records Detail** tab, will be updated. You can also transport Records Management system settings. For more information, see *OpenText Content Server - Records Management (LLESRCM-UGD)*
Remote Object	
Search Form	
Search Query	
Search Results Template	

ITEM TYPE	NOTES
Security Clearance metadata	Assigned Security Clearance Levels or Supplemental Markings will be retained when a managed object is transported and deployed to the target system. If an item's Security Clearance Level or Supplemental Marking does not exist on the target system, the system will automatically create it. If the managed object already exists on the target system, the metadata for that managed object, which appears on the **Security Clearance** tab, will be updated. If you transport an RM Classification or Folder that has an assigned Records Manager Group, the assigned Records Manager Group will be retained when you deploy the RM Classification or Folder on the target system. You can also transport Security Clearance system settings. For more information, see *OpenText Content Server - Security Clearance Administration (LLESRCS-AGD)*. **Note:** The import and export functionality for Security Clearance is accessed from the Content Server Administration pages. If you do not have Administrative permissions, you cannot access these pages.
Shortcut	
Task	
Task Group	
Task List	
URL	
Wiki	
Workflow	
Workflow Attachment	If a Workflow that contains a sub-Workflow is transported and the sub-Workflow has attachments, those attachments will not be transported.
Workflow Map	
XML DTD	

1.3   The Transport Warehouse

The Transport Warehouse is an area of Content Server that is designated for use by Warehouse Managers, and is reserved for functions that are exclusive to Transport. You can access the Transport Warehouse from the **Enterprise** menu.

Note: The **Transport Warehouse** option on the **Enterprise** menu is only visible to users that have been assigned the **Warehouse Manager** usage privilege by a Content Server administrator. By default, only Content Server administrators and members of the **Business Administrators** group can access the Transport Warehouse.

In the Transport Warehouse, you work with Warehouse Folders, Workbenches, Transport Packages, and Transport items. (When a Content Server item is added to the Transport Warehouse, it becomes a Transport item. Transport items are representations of Content Server items. They can be managed only within the Transport Warehouse.)

Tip: Faceted Browsing is available for the items within a Warehouse, which means you can quickly view items based on the type of Warehouse item (Workbench, Transport Package, Transport items, or Warehouse Folders). You can also view items based on when they were last modified and by the item's owner. For more information about Faceted Browsing for Content Server, see *OpenText Content Server - Documents and Text Documents (LLESWBD-UGD)*.

1.3.1   Warehouse Folders

A **Warehouse Folder** is a container that is used to store the items you are preparing to transport. Warehouse Managers can create Warehouse Folders in the Transport Warehouse and give permissions to specific users so that they can access the folders.

To Create a Warehouse Folder

To create a Warehouse Folder:

1.   Click **Transport Warehouse** on the **Enterprise** menu.

2.   On the Transport Warehouse page, click **Warehouse Folder** on the **Add Item** menu.

3.   On the **Add: Warehouse Folder** page, type a name for the Warehouse Folder in the **Name** box, and then click **Add**.

Note: If you want other users to have access to the Warehouse Folders you create, you must assign permissions to them individually. For more information, see *OpenText Content Server - Get Started (LLESRT-UGD)*.

1.3.2   The Transport Workbench

A Transport **Workbench** contains Content Server items that will be used in a Transport operation. You can create a Workbench in the Transport Warehouse, at the top level or in a Warehouse Folder. Workbenches can be accessed by users with the proper permissions. For more information, see "Access Levels in Transport" on page 5.

A Content Server item in a Workbench is called a Transport item. The Workbench is the primary location on the source system where users store and work with Transport items. Transport items must be added to a Workbench, not directly to the Warehouse. On the target system, Workbenches allow you to review imported Transport items, and then deploy them in Content Server.

A single Workbench can be used by multiple users who have permission to access it. Users can view the Workbenches they have permissions to on the **My Workbenches** page, which is accessed from the **Personal** menu. If you have sufficient permissions, you can also click the **Transport Warehouse** link in the Workbench's **Location** column to access the Warehouse that contains the Workbench.

When you open a Workbench, the Workbench Overview page displays the Transport items in the Workbench, along with such details as when they were added to the Workbench and the last time they were added to a Transport Package.

Access the My Workbenches Page

To access the My Workbenches page:

• Click **Workbenches** on the **Personal** menu.

Create a Workbench

To create a Workbench:

1. Click **Transport Warehouse** on the **Enterprise** menu.

2. On the Transport Warehouse page, click **Add Item**, and then choose **Workbench**.

3. On the **Add: Workbench** page, type a name for the Workbench in the **Name** box, and then click **Add**.

Add Items to a Workbench

You can add folders, Documents and any other supported items to a Workbench. When you add a folder to a Workbench, you can include all of the folder's contents, or only the folder itself. To add some items from the folder (but not every one), add them individually. If you add a folder and select the **Include Contents** option, all items in the folder are added to the Workbench.

Transport automatically checks to see if items already exist in the Workbench before they are added. If a duplicate item exists, you can overwrite the existing item or ignore the duplicate and leave the existing item as is.

> **Note:** Unlike most items in Content Server, items in a Workbench cannot be copied or moved. Workbenches can be moved by the Administrator or Warehouse Manager, and can be moved only to a Warehouse Folder or to the root of the Transport Warehouse Volume.

To Add an Item to a Workbench

To add an item to a Workbench:

1. Browse to the item you want to add to the Workbench, click its **Functions** menu, and then click **Add to Warehouse**.

2. In the **Add to Workbench** section, click **Browse Content Server**, browse to the Workbench where you want to add the item, and then click its **Select** link.

3. In the **Duplicate Handling** section, click one of the following options:

   - **Replace**, which replaces the item in the Workbench with the item you are adding.

   - **Skip**, which ignores the item and leaves the existing item in the Workbench as it is.

   > **Note:** The **Duplicate Handling** section only appears for containers.

4. Click **Add to Warehouse**.

> **Note:** You can add folders, including the contents of the folder, to a Workbench by clicking the folder's **Functions** menu, and then clicking **Add to Warehouse**.

Add Folders to a Workbench

To add Folders to a Workbench:

1.   Browse to the folder you want to add to the Workbench, click its **Functions** menu, and then click **Add to Warehouse**.

2.   Optional Select the **Include contents** check box.

3.   In the **Add to Workbench** section, click **Browse Content Server**, browse to the Workbench you want to add the folder to, and then click its **Select** link.

4.   In the **Duplicate Handling** section, select one of the following options:

   •   **Replace**, which replaces any duplicate items in the Workbench with the items you are adding.

   •   **Skip**, which ignores duplicate items and leaves the existing item in the Workbench.

5.   Click **Add to Warehouse**.

Update Items in a Workbench

Transport provides a graphic indicator to identify items that have changed since being added to the Workbench. When the indicator appears, you can click **Update Transport Item** to bring your Transport items up to date.

If, for example, you have added a document to a Workbench and that document has since had a new version added to it, Transport displays an **Original object modified** icon beside the Transport item that corresponds to the document. This icon indicates that a Transport item is *upgradeable*: it can be upgraded to its latest version.

To obtain the latest version of any upgradeable item, click **Update Transport Item** on the item's **Functions** menu. To bring multiple Transport items up to date at once, select them and then click the **Update Transport Items** multi-select button.

After you click **Update Transport Item**, the **Transport items to be updated** page appears. It lists the items that you have selected with a status of **Ready** for any upgradeable item and a status of **This transport item is already up-to-date and will be ignored** for any other item. If you have selected a Folder or any other container-type item, an **Include Contents** check box appears, with a note indicating how many items are in the Folder.

   Tip: The number that appears beside **Include Contents** includes the Folder itself so, for a Folder containing four items, **(5 objects included)** would appear.

Update Folders and other Containers

A Transport item displays the **Original object modified** icon if the **Modified** date of the original item has changed since it was added to the Transport Warehouse.

Changes that are applied at the Folder level cause a Folder to become upgradeable, whereas changes applied to one or more items in a Folder cause only the modified Transport items to become upgradeable, not the Folder. Some examples of changes that occur at the folder level are: applying a Category, applying a Classification, changing the Folder's Permissions, adding items to or deleting items from the Folder. Changes that do not make a Folder upgradeable include adding a new version of an item in the Folder and applying a Category directly to an item in the Folder. It helps to keep this in mind when you note which items in a Workbench are updateable and which ones are not.

When you update a Folder you have the option of selecting the **Include Contents** check box. If you do, Transport items will be created for new items that have been added to the Folder since it was first added to the Workbench. Existing items in the Folder that have been modified since the Folder was added are not modified, however, unless you select them specifically. (Such Transport items would appear as updateable in the Workbench.)

> **Note:** Transport items are never deleted from the Workbench as part of **Include Contents** functionality, even if the original item has been deleted from a Folder that you are updating. If you want to delete a Transport item from the Workbench, select it specifically and delete it.

To Update One or More Items in a Workbench

Transport items that have an **Original object modified** icon beside them can be updated to the latest version that is available in Content Server.

To update one or more items in a Workbench:

1. Open a Workbench in the Transport Warehouse.

2. Update one or more items.

   To update a single item
   Click **Update transport Item** on the item's **Functions** menu.

   To update one or more items
   Select each item that you want to update, and then click **Update Transport Items**.

3. The **Transport items to be updated** page appears, showing a status for each selected item. If the status is **Ready**, the item can be updated. If a different status appears, it indicates that the item is not updateable or that it is already up-to-date.

   Select the **Include contents** check box, if you want to apply any changes made to a Folder or other container type. (For more information on the **Include contents** check box, see "Update Folders and other Containers" on page 14.)

   Click **Update** to confirm the operation.

4.   The **Updating Transport Items** page appears, showing the Transport items that will be updated. Click **OK** to complete the operation and return to the Transport Workbench page.

Deploy Items in a Workbench

When you deploy one or more Transport items that are located in a Workbench, the items are deployed to your current instance of Content Server. Typically, you deploy Transport items after you have uploaded a Transport Package from a source system, and unpacked its contents to a Workbench.

Update permissions on object when deployment is an update/add version

By default, the permissions that are attached to the Transport items in a Workbench are applied the first time you deploy the items, but not on an subsequent deployments. If you want to update the permissions on subsequent deployments, select the **Update permissions on object when deployment is an update/add version** check box.

Example: Presume that you have imported a Transport Package containing a new folder and several documents that only one user can access, and unpacked that Transport Package to a Workbench. That user will have the same permission in the target system when you deploy the Workbench. If you then assign other users and groups permissions to that folder in the source system and repeat the process of transporting the Transport Package and deploying its contents, the new users will not be given permission in the target instance unless you select the **Update permissions on object when deployment is an update/add version**

The **Update permissions on object when deployment is an update/add version** setting is persistent. It applies to all Transport item deployments in that Workbench until it is changed, including deployments of individual Transport items.

Deploy an Item

To deploy an item:

1.   Click **Transport Warehouse** on the **Enterprise** menu.

2.   On the **Transport Warehouse** page, click the Workbench that contains the Transport item that you want to deploy.

3.   On the <*Workbench_Name*> page, browse to the item you want to deploy, and then click it. The **Transport Item Overview** page appears. Verify that the object dependencies are correct for this item. If necessary, make changes by clicking **Edit** beside any dependency.

4.   Click **Deploy**.

5.   Click **OK** in the confirmation dialog, and then click **Deploy** again.

Deploy a Workbench

To deploy a Workbench:

1. Click **Transport Warehouse** on the **Enterprise** menu.

2. On the **Transport Warehouse** page, click the Workbench you want to deploy, and then click **Deploy Workbench**.

3. On the **Deploy <*Workbench_Name*>** page, verify that the Workbench information and the objects to be deployed are as you expect.

    📄 **Notes**

    - To modify any Transport item dependencies before you deploy the Workbench, click the Transport item in the Workbench, and then click **Edit** for the item in the **Actions** column.

    - If an item being deployed has the same name as an item in the parent container to which it is being added, it will be added as a new version.

4. In the **Workbench information** section, select the **Update permissions on object when deployment is an update/add version** check box if you want object permissions to be updated whenever you deploy an object (both on the initial deployment of the object and on any subsequent update deployments).

5. Click **Deploy**.

6. In the confirmation dialog, click **OK**.

7. When the deployment is complete, confirm the status for each item, and then click **OK**.

1.3.3 The Transport Package

A **Transport Package** is a container where items in Workbenches are added when they are ready to transport to the target system.

When preparing the Workbench, you can add properties files and instructions in addition to the other items. These instructions can be useful for deployment, especially when a different Administrator or Warehouse Manager is responsible for deploying the contents on the target system.

📄 **Note:** Transport Packages appear in the Warehouse and can only be accessed by the Warehouse Manager.

A Transport Package is a container that stores the set of items that are ready to be transferred to the target system. The *Transport Packages* container appears by default in the Warehouse. Transport Packages are created from the Warehouse, or from a Workbench if you have the proper permissions, and added to the Transport Package container by default. If a Transport Package is created from the Workbench, a message appears stating that the Transport Package is now available for the Warehouse Manager.

You can add additional Transport Packages to the *Transport Packages* container. General information for Transport Packages, such as the name, description, size, when and by whom it was created, and what instance of Content Server the Transport Package originated from, appear on the Transport Package Overview page. The overview page appears when you open a Transport Package, either by clicking its link, or clicking **Open** on the Transport Package's **Functions** menu.

Add a Workbench to a Transport Package

Once a Workbench contains all the items required for transport and the Workbench has been reviewed and tested, the items are *added to a Transport Package*. *Adding to a Transport Package* means that you are finalizing the items for transport to the target system. Once the Transport Package is finalized, it is moved to the Transport Packages area of the Warehouse, which is restricted to users with administration permissions.

The **Add to Transport Package** function is the final Workbench task for non-Administrator users. However, the Warehouse Manager still uses the Transport Package to begin the deployment process. For more information, see

To add a Workbench item to a Transport Package

To add a Workbench item to a Transport Package:

1. Click **Transport Warehouse** on the **Enterprise** menu.

2. Open the Workbench that has the item that you want to add, and then do one of the following:

   - Click the **Add to Transport Package** link for the item.

   - On the item's **Functions** menu, click **Add to Transport Package**.

   💡 **Tip:** To add all of the items in the Workbench to a Transport Package, click **Add all to Transport Package**.

3. On the **Add: Transport Package** page, type a name for the new Transport Package in the **Name** box, and then click **Add**.

To Rename a Transport Package

To rename a Transport Package:

1. Click **Transport Warehouse** on the **Enterprise** menu.

2. Click the **Transport Packages** link, click the **Functions** menu for the Transport Package you are renaming, and then click **Rename**.

3. Type a new name in the **Name** box, and then click **Update**.

To Download a Transport Package

To download a Transport Package:

1. Click **Transport Warehouse** on the **Enterprise** menu.

2. On the **Transport Warehouse** page, navigate to the Transport Package you want to download, click **Download** on the **Functions** menu, and then save the ZIP file to an external location.

📄 **Note:** After you download the Transport Package, you will need to transfer it by email, network, or USB, to a location on the target system.

To Import a Transport Package

To import a Transport Package:

1. On the target system, click **Transport Warehouse** on the **Enterprise** menu.

2. On the **Transport Warehouse** page, click **Transport Packages**.

3. Upload the Transport Package, using one of the two following methods:

    📄 **Note:** The file must be a ZIP file, and contain only Transport Package items.

    *   **Add Item menu**

        a. On the **Transport Packages** page, click **Transport Package** on the **Add Item** menu.

        b. On the **Add Transport Package** page, type a name for the Transport Package in the **Name** box, or leave it blank to keep the existing file name.

        c. Optional Type a description for the Transport Package in the **Description** field.

        d. In the **Transport Package File** section, click **Browse**, browse to the file that you want to add, and then click **Open**.

        e. Click **Add**.

    *   **Drag and drop**

        Drag and drop the Transport Package onto the **Transport Packages** page.

To Unpack a Transport Package to a Workbench

To unpack a Transport Package to a Workbench:

1. Click **Transport Warehouse** on the **Enterprise** menu.

2. On the **Transport Warehouse** page, click the Transport Package that you want to open.

3. The **Transport Package Overview** page opens.

    a. If a message appears that states **This transport package references metadata languages that are not available in this system** perform one of the following actions, and then click **Map Languages**:

        • Click the **Configure Multilingual Metadata** link. On the **Configure Multilingual Metadata** page, add the missing metadata languages.

        • In the **Metadata Languages** area, map the Language Codes used in the Transport Package to an Available Language on your target system.

        💡 **Tip:** Alternatively, you can remove the metadata language values from the Transport Package items in the source system. See "Language Prerequisites" on page 22.

    b. Below the listing of the Transport Package **Contents**, click **Unpack to Workbench**.

4. In the **Unpack to** section of the **Unpack** page, click **Browse Content Server**, browse to the Workbench you want the contents of the Transport Package unpacked to, and then click its **Select** link.

5. In the **Duplicate Handling** section, click one of the following options:

    • **Replace**, which replaces items in the Workbench with the item from the Transport Package if they have the same unique ID.

    • **Skip**, which ignores items on the Workbench that have the same unique ID. These items will not be unpacked to the Workbench.

6. Click **Unpack**.

💡 **Tip:** You can also unpack a Transport Package to a Workbench by clicking the Transport Package's **Functions** menu, and then clicking **Unpack**.

1.4 Deploy a Transport Package on a Target System

📋 **Note:** You must be a Warehouse Manager to deploy a Transport Package.

To deploy a Transport Package to a target system, perform the following steps:

1. Download the Transport Package from the source system, and save the file to an external location (for example, a USB drive or network location). See "To Download a Transport Package" on page 19.

2. Upload the Transport Package to the **Transport Packages** folder on the target system. (You can use the **Add Item** menu or drag and drop the Transport Package.) See "To Import a Transport Package" on page 19.

3. Unpack the Transport Package to a Workbench on the target system. After you unpack the Transport Package, Content Server displays its Transport items in the Workbench that you selected. See "To Unpack a Transport Package to a Workbench" on page 20.

    📋 **Note:** If you have multiple Transport Packages that contain items that you want to deploy to the target system, you can unpack them to the same Workbench and deploy them to Content Server at the same time.

4. Review the Workbench to ensure that item Dependencies are met for each item. See "Verify and Edit Dependencies" on page 23.

5. Deploy the Workbench. See "Deploy a Workbench" on page 17. If an item being deployed has the same name as an item in the parent container to which it is being added, it will be added as a new version.

1.5 Transport Prerequisites and Dependencies

Several conditions must be satisfied to permit a successful deployment of a Workbench. If your Transport Package includes items with Multilingual Metadata values (for example, item names in multiple languages), you must ensure that suitable Multilingual Metadata Languages are present on the target system.

Similarly, any Dependencies that exist for Content Server items in the Transport Package must be satisfied in the target system. Transport Dependencies are technical requirements that must be satisfied before a Workbench can be successfully deployed. Transport provides an interface for verifying and, if necessary, editing Dependencies. (See "Verify and Edit Dependencies" on page 23.)

1.5.1   Language Prerequisites

If a Transport Package contains items with multilingual metadata values, the multilingual metadata languages that are used by the items in your Transport Package must also be present in the target system. If they are not, you must resolve the multilingual metadata language prerequisites before you can unpack the Transport Package to a Workbench .

For more information on multilingual metadata, see *OpenText Content Server - Administering Content Server (LLESWBA-AGD)*.

You can resolve multilingual metadata language prerequisites in any of the following ways:

Add and Enable the Missing Multilingual Metadata Language on the Target System

If the Transport Package that you are attempting to unpack depends on one or more multilingual metadata languages that are not enabled in your target system, you can add and enable the missing multilingual metadata languages. Once you have added and enabled every missing multilingual metadata language, you can proceed to view the contents of the Transport Package.

Remove the Multilingual Metadata Language Dependency from the Transport Package

If the Transport Package that you are attempting to unpack depends on a multilingual metadata language that is not enabled in your target system, and you do not require the multilingual metadata language values in the Transport Package on the source or target system, you can remove the unneeded values on the target system and update the Transport Package. After Content Server imports the updated Transport Package to the target system, you will no longer need to add and enable the multilingual metadata language that is not present on your target system.

Map the Multilingual Metadata Language on the Target System

If the Transport Package that you are attempting to unpack depends on a multilingual metadata language that is not enabled in your target system, but there is a variant of that language that is enabled on your target system, you can map the Dependency to allow the Transport Package to be unpacked. For example, if your Transport Package has a Dependency on the en_US language code and your target system has the en_NZ language enabled, you can map en_US to en_NZ to permit the Transport Package to be unpacked.

1.5.2   Item Dependencies

A Content Server item can have a wide variety of Dependencies. Every Content Server item depends on the container that houses it and the permissions that allow users to access it with varying levels of control. Some items depend on the Categories or Classifications that are used to sort or locate them. More complex item types, such as Workflows or Communities, may depend on other items such as forms, tables, attachments, and so on.

When you use Transport to deploy an item, you must ensure that the item's Dependencies are satisfied in the target Content Server instance. So, for example, you must ensure that the item has an owner in the target instance, and a container that it lives in. If the item has a Category assigned to it in the originating instance, you must assign an equivalent Category to it in the target instance. If the item is a complex type, such as workflow, you must ensure that all of the Dependencies that enable it to function properly are satisfied in the target instance.

Transport includes a Dependency scanner that helps you to ensure that every item Dependency is satisfied. For example, imagine you want to deploy an item that has user permissions and a Classification assigned to it. Before you deploy it, Transport scans Content Server to verify that the current instance of Content Server has corresponding users and a matching Classification. If the scanner finds them, Transport shows that the item is deployable.

The scanner can be used globally, to show whether an entire Workbench is deployable, or individually, to display detailed information on a single Transport item.

For information, see "Verify and Edit Dependencies" on page 23.

1.6   Verify and Edit Dependencies

Before you can deploy a Workbench, all of the Dependencies of each item in the Workbench must have a status of **Deployable**. For a Dependency to be deployable, it must either exist in the Workbench or in the instance where you are deploying the Workbench. If it exists in neither place, you can edit the Dependency to correct the problem.

You can verify that all of the Transport items are deployable on a single page, but if you need to correct a Dependency for an item, open the **Transport Item Overview** page for that Transport item.

The **Transport Item Overview** page displays different icons to indicate that a Dependency has been verified to exist in the instance where a Workbench is deployed. Each icon indicates the manner that the Dependency is verified.

Exact match found

> Each Content Server object has a globally unique identifier (or *GUID*). If **Transport GUID use** is enabled, when you transport an item from a source

system to a target system, it retains its GUID. If an item's **Transport Item Overview** page shows an **Exact match found** icon, it indicates that the GUID of the original object Dependency matches the GUID of the item that exists in the target instance.

> 📄 **Note:** Exact matches occur only if **Transport GUID use** is enabled. (It is enabled by default.) If this setting is not enabled, the **Exact match found** icon does not appear, and only the **Custom mapping used** and **Likely match found** icons appear on the **Transport Item Overview** to indicate that a Dependency is deployable.

Custom mapping used

If a satisfactory exact match is not found in the target system, you have the option of mapping the Dependency to an item that does exist in the target system. Once you edit a Dependency mapping, the **Custom mapping used** icon appears on the **Transport Item Overview** page. If you transport the same Content Server item into the target system in the future, Transport remembers the custom mapping.

> ⚠️ **Caution**
> Content Server prevents you from re-importing the same item to a different folder if **Transport GUID use** is enabled. To change the parent folder of a Transport item that was previously imported, you must delete the corresponding item from its location in Content Server, and then purge it from the Recycle Bin (if it is recyclable).

Likely match found

If Transport is unable to find an exact match and no custom mapping is in use, it attempts to find a Content Server item that corresponds to the Dependency. For example, if there is no folder in the target system that has the same GUID as a parent folder that you are importing, Transport attempts to find a probable match. It may, for example, present a folder with the same name as a probable match. Probable matches should be examined carefully to ensure that they are suitable for the items that you are importing. If they are not, you can edit the Dependency and map it to a more suitable item.

1.6.1 Overall Dependencies

When you click **Deploy Workbench**, Content Server displays the **Deploy: <Workbench_name>** page, which displays every Transport item in the Workbench. In the **Workbench information** section, it shows the number of items in the Workbench. In the **Objects to be deployed** section, it shows a list of the items that will be deployed with the following information for each item:

- Type

- Name

- Parent (the location where the item will be created in the target system)

- Status (whether the item is ready to deploy or not)

For each item, it shows whether it is deployable or not. If an item is not deployable, it may display additional information explaining why not. For example, it might display `Not deployable. Target already exists and does not support updates.`

> ❗ **Important**
>
> If any item on the **Deploy: <Workbench_name>** page is not deployable, the **Deploy** button is disabled and the deployment cannot proceed.

Typically, an item is undeployable because it has a prerequisite or Dependency that is not satisfied in the target system.

You can click any Transport item on the **Deploy: <Workbench_name>** to open its **Transport Item Overview** page and obtain more detailed information on the item and edit its Dependencies to make it deployable.

1.6.2 Individual Dependencies

When you click an individual Transport item that appears in a Workbench or on the **Deploy: <Workbench_name>** page, the **Transport Item Overview** page opens, providing detailed information on the item and its Dependencies. The information on this page appears in two different sections:

Original Object Information

This section displays the Transport item's metadata, as it exists on the Originating instance. You can review this information to make sure that you have the correct version of the item.

Original Object Dependencies

This section displays the Transport item's Dependencies. For each type of Dependency, it shows its original name or value and its current name or value. Typically, these are the same, but if you edit the Dependency, they will be different.

This section also shows whether the Dependency **Exists in Workbench** or **Exists in instance**. It must exist in one or the other for **Deployable** to appear in the **Status** column.

If an **Edit** button appears in the **Actions** column for the Dependency, you can modify the Dependency to tailor it for the target System.

1. The Dependency columns **Exists on this instance** and **Exists in Workbench** are only visible to Warehouse Managers. Only Warehouse Managers can edit item Dependencies. The **Edit** button is unavailable unless you are a Warehouse Manager.

2. If an item has a Dependency on more than one item with the same item type and name, it cannot be deployed.

1.6.3   Edit Dependencies

If a Transport item has one or more Dependencies that are not deployable, you can use the **Edit** button to modify the Dependency.

For example, if the parent container of an item does not exist on the target system, you can change the parent container to one that does. Or if the item is owned by a user who does not exist on the target system, you can use the **Edit** button to select a user that does.

But even if an item does have a status of **Deployable**, you still may need to modify its Dependency. For example, in certain cases Transport might automatically select a Container, User, or Category to resolve a Dependency. The Dependency would show a status of **Deployable** and the Transport item could be deployed, but the Container, User, or Category might not be the one that you desire.

As a simple example, imagine that Transport has selected **Folder A** as the Parent of a Transport item, but you want to deploy the Transport item to **Folder B**. The item would be deployable in either case, but the Warehouse Administrator needs to correct the **Parent** Dependency by clicking the **Edit** button, and then browsing to **Folder B**.

Tips

- Whenever you manually edit a Dependency, Content Server saves the setting and displays a **Custom mapping used** icon. The custom mapping is automatically applied if you import the same item again at a later time.

- You can modify a custom mapping, if you want. If you click **Edit** for a Dependency that has a custom mapping, you have two options available. You can modify the custom mapping in the same manner that you set it in the first place. Or you can click **Delete Mapping** to return the Dependency to the state it was in before you configured the custom mapping.

Bear in mind that the Dependency scanner verifies that a Dependency is satisfied from a technical level, but it can never know as much about a Transport package as the people that developed it. When you deploy a Workbench, pay careful attention that Dependencies are resolved in the way that makes sense in your Target system, and be sure to test the Transport package and every item in it after it has been imported, unpacked to a Workbench, and then deployed.

To Edit an Item Dependency

To edit an item Dependency:

1. Click **Transport Warehouse** on the **Enterprise** menu.

2. Open the Workbench that contains the item you want to change, click the item's **Functions** menu, and then click **Open**.

3. On the item's page, click **Edit** beside the Dependency that you wish to modify.

4. Modify the value in the **Current name/value** column using the available controls. (The buttons available to you will depend on the type of Dependency that you want to modify.)

5. Click **Save**.