Content Manager

Software Version 24.2

oneilBridge™ Integration – Installation and Configuration

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Introduction

About Content Manager Warehouse Integration

Content Manager Warehouse Integration enables you to integrate Content Manager with the electronic systems of a storage provider for physical records.

The Content Manager Warehouse Integration uses the Content Manager Software Development Kit (SDK) to access Content Manager data, where required.

The integration enables you to seamlessly manage requests for records that are stored with the storage vendor from Content Manager, including the initial request, authorization (optional), processing, tracking and delivery information.

About this document

This document provides information for you to install and configure your warehouse integration with the Content Manager feature advanced requests and an external storage provider's software.

For information about how to use advanced requests, see the Content Manager Help file **TRIM.chm** in your Content Manager installation folder.

Warehouse integration prerequisites

For prerequisites, see **CM24.2_Spec.pdf** in the Content Manager installation folder.

Overview

The example processes describes the interaction between:

- The Content Manager user placing a request

- The Content Manager O'Neil Integration utility

- The vendor itself

The process – Pickup New Record

This is the process used for when records are being sent to the Warehouse for the first time.

1. On the selected new record(s), in Content Manager, the user creates **Pickup – New Record** request. The status of this request is **New Request – Not Yet Actioned**.

2. The Content Manager O'Neil Integration utility sends a **Pickup** command via Scheduled Tasks which adds the pickup request as a Pickup Web Order for the Warehouse and the status of the Request in Content Manager is changed to **Order Sent to Vendor**.

3. The Warehouse updates the order to be a Workorder. The status of the Request in Content Manager is updated to **On Vendors Pick List** when the **Feedback** command is run via the Scheduled Tasks.

4. Storage vendor processes the requests, including organizing pickup.

5. The record(s) are picked from the Organization and are delivered to the Warehouse. The Warehouse updates the Workorder to be **Fulfilled** and the status of the Request in Content Manager is updated to **Request Completed** when the **Feedback** command is run.

The process – Retrieve Temporary

This is the process used for when records being stored at the Warehouse are required by the Organization.

1. On the selected record(s), in Content Manager, the user creates **Retrieve – Temporary** request for a record that is being held in the Warehouse. The status of this request is **New Request – Not Yet Actioned**.

2. The Content Manager O'Neil Integration utility sends a **Request** command via Scheduled Tasks which adds the retrieval request as a Delivery Web Order for the Warehouse and the status of the Request in Content Manager is changed to **Order Sent to Vendor**.

3. The Warehouse updates the order to be a Workorder. The status of the Request in Content Manager is updated to **On Vendors Pick List** when the **Feedback** command is run via the Scheduled Tasks.

4. Storage vendor processes the requests and records, including organizing delivery.

5. The record(s) are delivered to the requesting Organization, the Warehouse updates the Workorder to be **Fulfilled** and the status of the Request in Content Manager is updated to **Request Completed** when the **Feedback** command is run.

The process – Pickup Return

This is the process used for when records are being returned to the Warehouse.

1. On the selected record(s), in Content Manager, the user creates **Pickup – Return** request. The status of this request is **New Request – Not Yet Actioned**.

2. The Content Manager O'Neil Integration utility sends a **Pickup** command via Scheduled Tasks which adds the pickup request as a Pickup Web Order for the Warehouse and the status of the Request in Content Manager is changed to **Order Sent to Vendor**.

3. The Warehouse updates the order to be a Workorder. The status of the Request in Content Manager is updated to **On Vendors Pick List** when the **Feedback** command is run via the Scheduled Tasks.

4. Storage vendor processes the requests, including organizing pickup.

5. The record(s) are picked from the Organization and are delivered to the Warehouse. The Warehouse updates the Workorder to be **Fulfilled** and the status of the Request in Content Manager is updated to **Request Completed** when the **Feedback** command is run.

Installation and configuration overview

Install warehouse integration

The O'Neil Warehouse integration installation MSI deploys required files in the Content Manager installation folder.

Configure ONeilBridge.xml configuration file

This configuration file contains most of the important parameters to make your integration work with Content Manager and the storage vendor systems.
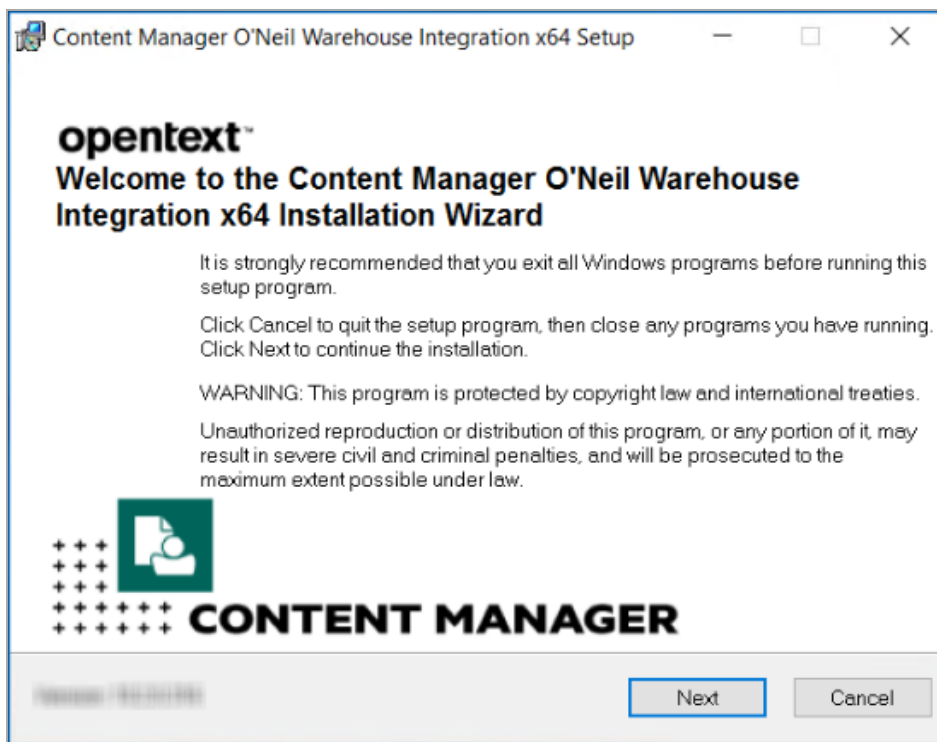
Configure scheduled tasks

The integration uses the Windows Task Scheduler, which needs to be configured to carry out the required tasks.

Installation and configuration
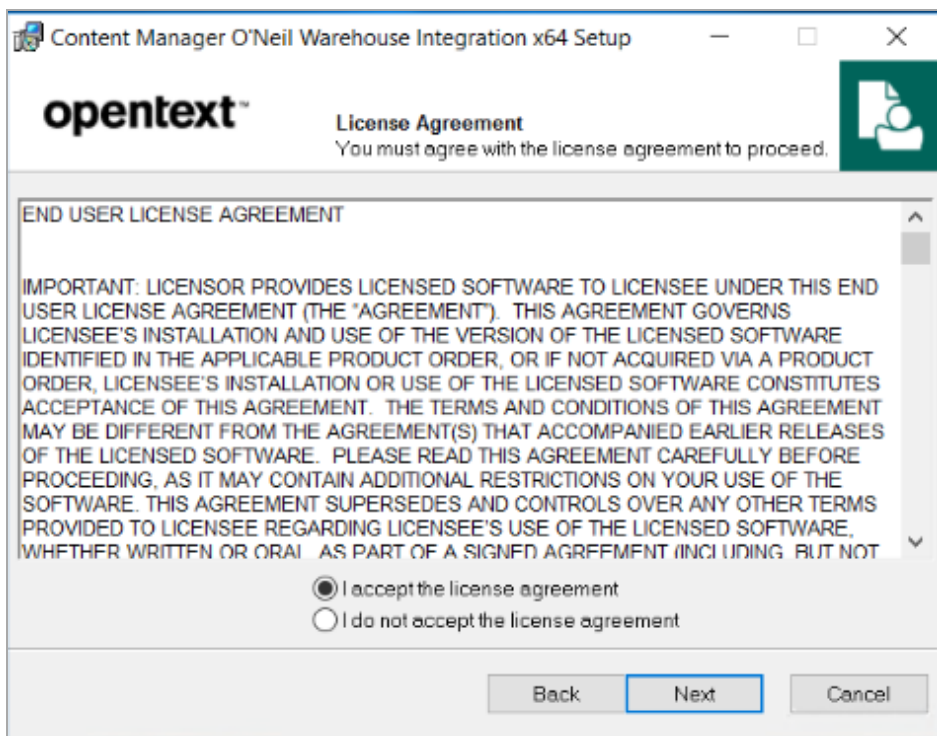
Installing warehouse integration

1. With elevated user rights, run the installation file **CM_ONeil_WareHouse_Integration_ x64.msi**
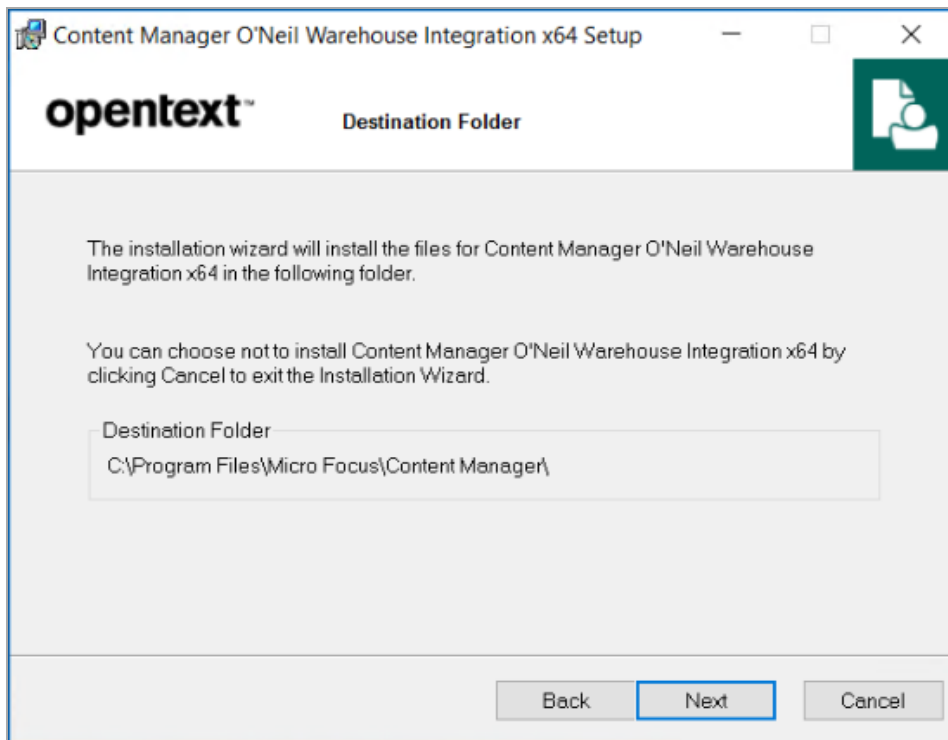
    The **Welcome** dialog appears:

2. Click **Next**.
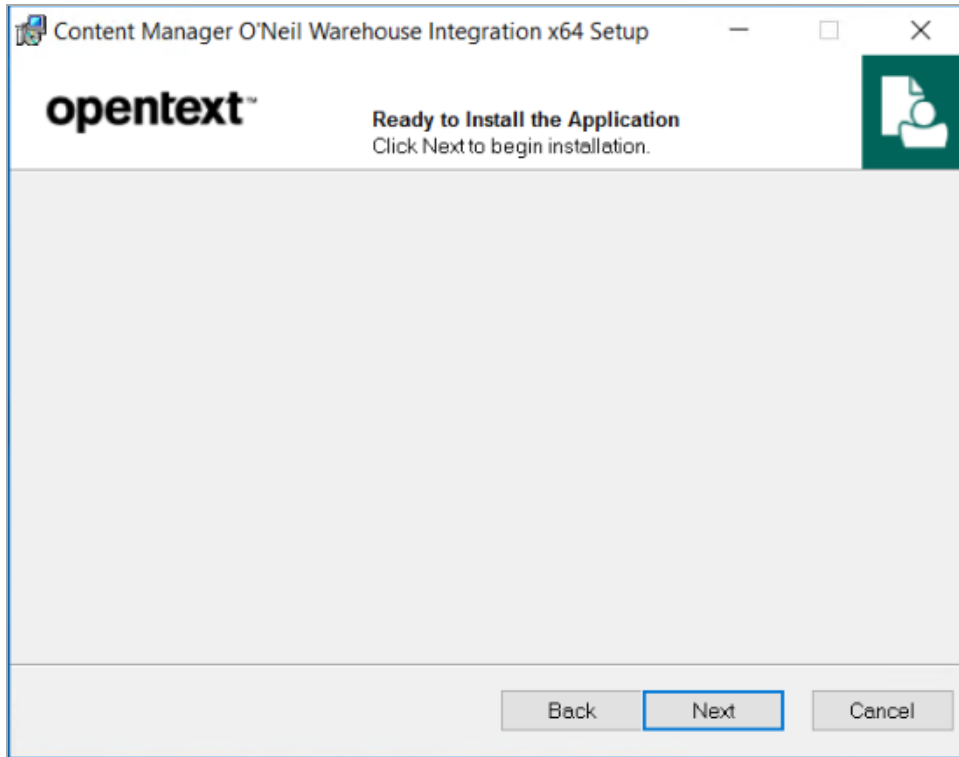
    The **License Agreement** dialog appears:

3. Select **I accept the license agreement** and click **Next**.
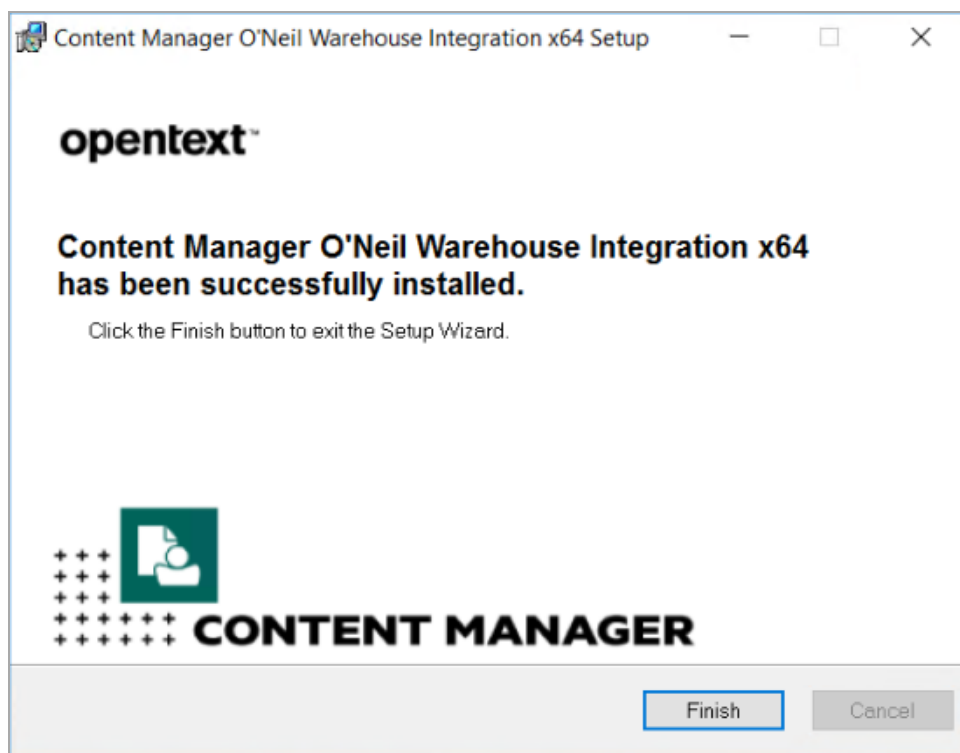
    The **Destination Folder** dialog appears:

4. Click **Next**.

The **Ready to Install the Application** dialog appears:

5. Click **Next**.

The installation confirmation dialog appears:

The required files are added to the folder **C:\Program Files\Micro Focus\Content Manager\oneilBridge**

6. Click **Finish**.

Configuring Content Manager

The O'Neil integration requires a storage location to be created within the Content Manager dataset that the records will be requested from. This Location will represent the Warehouse. Once the Location has been created, it is important to take note of its Unique Identifier, as this is required information when Editing the ONeilBridge.xml configuration file

Editing the ONeilBridge.xml configuration file

For a new installation, rename the **ONeilBridge.xml.template** to **ONeilBridge.xml** and then edit **ONeilBridge.xml** to set up the connection with Content Manager and the storage vendor site correctly.

Use an XML editor of your choice to edit the XML file. Some of the parameters are your choice, some are about your internal systems, and some must be provided by the storage vendor.

The format of the ONeilBridge.xml is:

```
<setup interact="yes" to enable the user interface, or "no" to disable it>

<oneil addr=URL of O'NeilBridge connector web service, e.g.
"https://connector.oneilsoft.com/Connector/FrontEnd201103/Service.svc"
```

```
fileroom=Uniquie identifier(GUID) of the file room to use in the O'NeilBridge,
e.g."4496e66b-bb9d-426a-ad8b-f034437832d4"

user=Name of O'NeilBridge user to login as

password=Password for above user

account=O'NeilBridge Account Identifier code e.g. "4040\100\100"

center=O'NeilBridge record center unique identifier(GUID), e.g "fefaff1a-ebc1-4e0b-
9273-cdb80283f477"

cost=O'NeilBridge cost code, e.g. "NJ"

/>

<host=Host name of the Content Manager workgroup server, e.g. "localhost"

dataset=Identifier code of the Content Manager dataset to connect to, e.g. "F1"

centeruri=Unique Identifier(URI) of the Content Manager location object representing
the warehouse, e.g. "9000001"

port=Network port used to connect to Content Manager workgroup server, e.g. "1137"

/>

</setup>
```

Configuring Task Scheduler

1. In Windows Task Scheduler, under **Task Scheduler Library**, create a new top level folder, for example, **Content Manager**, and a folder inside it, for example, **oneilBridge**

2. Right-click the folder created in step 1 and click **Create Task**

3. On the **General** tab:
   a. Name - type in the Name of the task.

   b. Description – type in a description of the task.

   c. Security Options - if required - change the user account that is running the task; and select the required Run options.

4. On the **Triggers** tab, define how often to run the task.

5. On the **Actions** tab, configure the Action that the task will perform.

   a. For **Action**, **Start a program** should be selected.

   b. The field **Program/script** should display " C:\Program Files\Micro Focus\Content Manager\oneilBridge\TRIMONeilBridge.exe" (or the path that the TRIMONeilBridge.exe is located)

   c. **Add arguments** should display:
      • for Pickup requests – Pickup

      • for Temporary – Retrieval requests – Request

- to update the status of a Request that is with the Vendor - Feedback

6. Optionally, in the tab **Conditions**, under **Power**, clear the option **Start the task only if the computer is on AC power** if you intend to use a mobile computer for demonstrations that may not be on AC power when you demonstrate

7. Click **OK** to save the task settings. You may need to enter your password to confirm.

8. Use those steps to create the tasks for Pickup, Request and Feedback.

9. Right-click a task and click **Run** to run the task and verify in the column **Last Run Result** that the task completed successfully

10. In the administration web application, in the tab **Scheduler**, you should now be able to see the tasks you created in Task Scheduler.

Logging

All processes are written to a log file, **TRIMONeilBridge.txt**, in **C:\Program Files\Micro Focus\Content Manager\oneilBridge**

Using the oneilBridge™ Integration

- The oneilbridge™integration only supports the pickup and retrieval of Content Manager records that have a Record Type that has a behavior of **Box**. Any records that are contained within a box are not submitted as individual items to the RS-SQL software.

- All records being submitted for pickup and retrieval must have a unique Foreign Barcode number. This number represents the Item Code for the Warehouse and must be either 6 or 10 characters in length.

- The oneilBridge™ integration supports the following Advanced Request Processing options:
  - Pickup – New Record

  - Retrieve – Temporary

  - Pickup – Return

See Overview for details.