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Xerox® DocuShare®
Lifecycle Manager Guide

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DocuShare Lifecycle Manager

Overview

Using DocuShare Lifecycle Manager you can effectively manage all of your time-sensitive content by creating policies. A policy helps to enforce aging requirements on content by providing email notifications of approaching due dates. In addition to notifications, CPX users can create policies for use with content rules. A policy can send a content rule event to trigger a time-based action, such as document archiving or review. You create policies for collections on your site. Policies run at defined time intervals and act on objects that meet the specified criteria.

This guide describes the features unique to DocuShare Lifecycle Manager: policy creation and the configuration pages in the Administration UI. All other DocuShare features and capabilities are described in the *DocuShare User Guide* and the *DocuShare Administrator Guide* located on the site **Help Desk**.

Using Lifecycle Manager

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DocuShare Lifecycle Manager provides a link on the DocuShare home page. Clicking the link displays the Lifecycle Manager Policies Listing page. You use the page to create, edit, and delete policies as well as to display all of your policies.

To open the Lifecycle Manager Policies Listing page:

1.   Go to the DocuShare home page.

2.   Under **Other Links**, click the **Lifecycle Manager Policies** link.

Policy overview

You can create a policy for a single collection, a hierarchy of collections, or all of the collections on your site. You also can create several policies for the same collection. When creating a policy, you specify what to monitor: a date property and an offset (the offset indicates whether or not the policy executes before or after the date property) or an exact date. Additionally, you choose whether to search specific objects for the date.

If you want Lifecycle Manager to monitor a date property assigned to documents, then you select **Documents** from the **Search Scope** menu when you create the policy. For example, if you want to monitor the expiration date of documents in a collection, you would specify the collection and choose documents for the search scope. This instructs Lifecycle Manager to check the expiration date of each document and perform the selected action as the expiration date approaches for individual documents.

If you want Lifecycle Manager to monitor a date property assigned to collections, then you select **Collections** from the **Search Scope** menu when you create the policy. For example, you might have a hierarchy of collections and would prefer to monitor the expiration date at the collection level. You would specify the top-most collection and choose to search collections. This instructs Lifecycle Manager to check the expiration date of each collection and perform the selected action as the expiration date approaches.

Additionally, you can combine the different types of searches by creating separate policies.

Create policies

You can create a policy to receive notification of an approaching deadline or after a date has passed. If you are a CPX user, you can create a policy to either start an automated process as defined in a content rule or start an automated process and send an email notification.

When creating a policy, you can use the expiration date property to track a future date. For future dates, notifications or content rule events are sent as the date approaches. To track a past date, you can use the modified date property. For past dates, notifications or content rule events are sent a specified time after the date occurred.

Note: **To create Lifecycle Manager Policies, you must be a member of the Lifecycle Manager Users group.**

Create a policy to send an email notification

To create a policy:

1. Open the Lifecycle Manager Policies page and click the **Create Lifecycle Manager Policy** button.

2. Enter a **Policy Title**.

    The title appears under the **Title** heading on the Lifecycle Manager Policies page.

3. In the **Collection Handle** field, enter the handle of the collection that contains the content to search.

    You can enter **all** to search all of the collections on your site.

4. From the **Search Scope** menu, select a DocuShare object type.

    By default; User, Group, Version, Rendition, Topic, Event, WeblogEntry, and WikiPage object types are excluded from the Search Scope.

5. From the **Object Type to Search** menu, select a specific type of object to search.

    Choices displayed in this menu are based on your selection from the Search Scope menu, and include the default DocuShare object type and any custom object types.

6. In the **Policy Action** field, select **Send email notification**.

7. In the **Notify** field, select one of the following:

    – **Before or on a future date**—Find objects a specified amount of time before a property date value.

    – **After a past date**—Find objects a specified amount of time after a property date value.

    – **On a specific date**—Find objects on a specified date.

8. Depending on your selection in step 7, enter the needed date information.

9. In the **Include Past Due Objects** field, choose whether or not to find objects that were in the collection before you created the policy and the date property to monitor is before the policy creation date. For example, if you chose to monitor the expiration date of documents, select **Yes** to have Lifecycle Manager find documents whose expiration dates are before the date the policy was created.

10. In the **Additional Criteria** field, refine the search by specifying another property condition.

11. From the **Next Run Date** calendar, select the next day/month/year when the policy should run.

12. From the **Next Run Time** menu, select the time of day when the policy should run on the selected Next Run Date.

13. From the **Period** menu, select how often you want the policy to run and send email notifications.

14. In the **Send Email To** field, do one, or both, of the following to specify the account to send the email notification to:

    – For user accounts, in the **Users** field, start typing the first part of a username, first name, last name, or email address until the account you want displays; then select the account. To enter multiple accounts in the Users field, separate each account entry with a comma.

    – For group accounts, in the **Groups** field, start typing the first part of a group title or email alias until the account you want displays; then select the account. To enter multiple accounts in the Groups field, separate each account entry with a comma.

15. In the **Notify Owner** field, select whether or not to send the email notification to the object owner. Select **Yes** to notify the owner; otherwise, select **No**.

16. In the **External Recipients** field, enter the email addresses for recipients who are not registered users on the DocuShare site. Separate email addresses with a comma.

17. In the **Comments** field, enter any information that you want sent with the email notification.

18. In the **Policy Status** field, select one of the following:

    – **Enabled**—Activates the policy.

    – **Enabled for a Specific Date Range**—Sets the time period during which the policy is active. Specify the time period using the **Date Range** fields.

19. Click **Apply**.

Create a policy to send a content rule event

To create a policy:

1. Open the Lifecycle Manager Policies page and click the **Create Lifecycle Manager Policy** button.

2. Enter a **Policy Title**.

    The title appears under the **Title** heading on the Lifecycle Manager Policies page.

3. In the **Collection Handle** field, enter the handle of the collection that contains the content to search.

    You can enter **all** to search all of the collections on your site.

4. From the **Search Scope** menu, select a DocuShare object type.

    By default; User, Group, Version, Rendition, Topic, Event, WeblogEntry, and WikiPage object types are excluded from the Search Scope.

5. From the **Object Type to Search** menu, select a specific type of object to search.

    Choices displayed in this menu are based on your selection from the Search Scope menu, and include the default DocuShare object type and any custom object types.

6. In the **Policy Action** field, select **Send content rule event**.

7. In the **Event Occurs** field, select one of the following:

    – **Before or on a future date**—Find objects a specified amount of time before a property date value.

    – **After a past date**—Find objects a specified amount of time after a property date value.

    – **On a specific date**—Find objects on a specified date.

8. Depending on your selection in step 7, enter the needed date information.

9. In the **Include Past Due Objects** field, choose whether or not to find objects that were in the collection before you created the policy and the date property to monitor is before the policy creation date. For example, if you chose to monitor the expiration date of documents, select **Yes** to have Lifecycle Manager find documents whose expiration dates are before the date the policy was created.

10. In the **Additional Criteria** field, refine the search by specifying another property condition.

11. From the **Next Run Date** calendar, select the next day/month/year when the policy should run.

12. From the **Next Run Time** menu, select the time of day when the policy should run on the selected Next Run Date.

13. In the **Policy Status** field, select one of the following:

    – **Enabled**—Activates the policy.

    – **Enabled for a Specific Date Range**—Sets the time period during which the policy is active. Specify the time period using the **Date Range** fields.

14. Click **Apply**.

To create a content rule for use with the policy, see

Create a policy to send both an email notification and a content rule event

To create a policy:

1. Open the Lifecycle Manager Policies page and click the **Create Lifecycle Manager Policy** button.

2. Enter a **Policy Title**.

    The title appears under the **Title** heading on the Lifecycle Manager Policies page.

3. In the **Collection Handle** field, enter the handle of the collection that contains the content to search.

    You can enter **all** to search all of the collections on your site.

4. From the **Search Scope** menu, select a DocuShare object type.

By default; User, Group, Version, Rendition, Topic, Event, WeblogEntry, and WikiPage object types are excluded from the Search Scope.

5. From the **Object Type to Search** menu, select a specific type of object to search.

Choices displayed in this menu are based on your selection from the Search Scope menu, and include the default DocuShare object type and any custom object types.

6. In the **Policy Action** field, select **Send both**.

7. In the **Event Occurs** field, select one of the following:

   - **Before or on a future date**—Find objects a specified amount of time before a property date value.

   - **After a past date**—Find objects a specified amount of time after a property date value.

   - **On a specific date**—Find objects on a specified date.

8. Depending on your selection in step 7, enter the needed date information.

9. In the **Notify** field, select one of the following:

   - **Before or on the event**—Send the email notification a specified amount of time before the event occurs.

   - **After the event**—Send the email notification a specified amount of time after the event occurs.

10. Depending on your selection in step 9, enter the needed date information.

11. In the I**nclude Past Due Objects** field, choose whether or not to find objects that were in the collection before you created the policy and the date property to monitor is before the policy creation date. For example, if you chose to monitor the expiration date of documents, select **Yes** to have Lifecycle Manager find documents whose expiration dates are before the date the policy was created.

12. In the **Additional Criteria** field, refine the search by specifying another property condition.

13. From the **Period** menu, select how often you want the policy to run and send email notifications.

14. From the **Next Run Date** calendar, select the next day/month/year when the policy should run.

15. From the **Next Run Time** menu, select the time of day when the policy should run on the selected Next Run Date.

16. In the **Send Email To** field, do one, or both, of the following to specify the account to send the email notification to:

    - For user accounts, in the **Users** field, start typing the first part of a username, first name, last name, or email address until the account you want displays; then select the account. To enter multiple accounts in the Users field, separate each account entry with a comma.

    - For group accounts, in the **Groups** field, start typing the first part of a group title or email alias until the account you want displays; then select the account. To enter multiple accounts in the Groups field, separate each account entry with a comma.

17. In the **Notify Owner** field, select whether or not to send the email notification to the object owner. Select **Yes** to notify the owner; otherwise, select **No**.

18. In the **External Recipients** field, enter the email addresses for recipients who are not registered users on the DocuShare site. Separate email addresses with a comma.

19. In the **Comments** field, enter any information that you want sent with the email notification.

20. In the **Policy Status** field, select one of the following:

    – **Enabled**—Activates the policy.

    – **Enabled for a Specific Date Range**—Sets the time period during which the policy is active. Specify the time period using the **Date Range** fields.

21. Click **Apply**.

View, change, and delete policies

From the Lifecycle Manager Policies page, you can view all of the policies that you own as well as preview, change, disable, or delete any of your policies.

View policies

1. Open the Lifecycle Manager Policies page.

    All of the policies that you own display.

2. To export a list of your policies, click one of the **Export options**. Then either open or save the file.

Change a policy

1. Open the Lifecycle Manager Policies page.

2. Click the **Edit** button next to the title of the policy that you want to change.

    The Edit Lifecycle Manager Policy page displays the properties that you can change.

3. Change the properties you want and then click the **Apply** button.

Disable a policy

You disable a policy when you no longer want it to be active. You can enable the policy at a later date.

1. Open the Lifecycle Manager Policies page.

2. Click the **Edit** button next to the title of the policy that you want to disable.

3. In the **Policy Status** field, select **Disabled** and then click the **Apply** button.

Delete a policy

1. Open the Lifecycle Manager Policies page.

2. Click the **Edit** button next to the title of the policy that you want to delete.

3. At the bottom of the Edit Lifecycle Manager Policy page, click the **Delete this Policy** button.

4. Confirm the deletion by clicking **OK**.

Preview a policy

1. Open the Lifecycle Manager Policies page.

2. Click the **Preview** button next to the title of the policy that you want to preview.

   A preview page displays a summary of the policy.

Run a policy

1. Open the Lifecycle Manager Policies page.

2. Click the **Run Now** button next to the title of the policy that you want to run immediately.

   Runs the policy regardless of how the policy time period was configured: daily, weekly, or monthly. A success/failure message is displayed after the policy runs.

Use content rules with policies

You can create a content rule to trigger an action when a Lifecycle Manager policy event occurs. This allows you to automate actions such as document deletion or document routing. Using property settings, you can have content rules run based on aging from a single policy or multiple policies. You also can create more than one content rule for a single policy or multiple content rules for multiple policies.

For instance, you might want multiple content rules to run from a single policy when you have common aging requirements that need to be handled differently for different documents. Suppose you use DocuShare to manage policies and procedures that must be reviewed every year. You can create a single policy for all of these documents and have them sent out for annual review. However, if different co-workers review certain types of documents, you can create several content rules that are triggered by the same policy. When creating each content rule, you define different property conditions to ensure that each type of document is reviewed by the appropriate person.

An example where you might want a single content rule triggered by multiple policies is for automating a simple action, such as delete, without variation across types of documents. You could have numerous policies that define many types of aging with the same end result: document deletion.

DocuShare provides a wizard to guide you in creating a content rule. Using the wizard, you specify the title of the policy to use. To obtain a list of all your policies including their titles, see View policies on page 10. For more information on content rules, refer to the *DocuShare User Guide*.

To create a content rule for use with a policy:

1. Locate the collection for which you created a policy to send a content rule event.

2. Do one of the following:

   – Click the collection's **Content Rules** icon.

   – Click the collection's **Properties** icon. Then click the **Content Rules** link.

3. On the Content Rules page, click **Create a New Content Rule**.

   The Create a New Content Rule wizard appears. The following steps describe the required fields. For information about any of the optional fields in the wizard, click the appropriate field name.

4. On the Description page, enter a **Title** for the content rule and click Next.

5. On the Event Triggers page under **When**, do the following:

   a. Select **Lifecycle management**.

   b. Select **Lifecycle policy**.

   c. Optionally, select the object type and, if a document, the document type.

6. If the object is a container (collection, calendar, etc.), select one of the following choices from the **Event Applies To** menu. Then click **Next**.

   – **This container and immediate contents**—Triggers the action when the event occurs to the container and only its first nested level of objects.
   For example, if a collection contains several objects and a subcollection, the action is

triggered when the event occurs to any of the objects and the subcollection; the action is not triggered when the event occurs to an object in the subcollection.

– **This container and all levels of contents**—Triggers the action when the event occurs to the container and all of the objects under it.
For example, when the event occurs to any object in a collection regardless of its nested level, the action is triggered.

Note: **Your administrator sets the maximum number of objects DocuShare examines to determine if the event occurred. The default is 30,000 objects.**

7. On the Content Property Conditions page under **Where the application specific conditions apply**, enter the policy title after **contains**. Then click **Next**.

8. On the Action Performed page, select the action to run when the event occurs and click **Next**.

    The Action Settings page appears. The options on the page vary depending on the action you selected in the previous step.

9. Enter the appropriate information and click **Next**.

10. On the Completion Settings page, you can choose to set a property value on the object when the content rule completes. In addition, you can append the property value to any existing property values. Then click **Done**.

    The View Properties page for the content rule appears and provides a summary of the content rule.

Configuring Lifecycle Manager

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DocuShare Lifecycle Manager provides configuration pages in the Administration UI. If you are an administrator, you use the pages to select the properties that display in email notifications.

Note: **To create Lifecycle Manager Policies, a user must be a member of the Lifecycle Manager Users group.**

Configure the email notification properties

Using the Email Notification Properties page, you select the properties and the order in which they appear in email notifications.

To configure the email notification properties:

1. On the page footer, click **Admin Home**.

2. From the **Administration** menu, click **Content Management | Lifecycle Management | Email Notification Properties**.

3. From the **Possible Objects** menu, select the object type that you want to configure for email notification.

   By default; User, Group, Version, Rendition, Topic, Event, WeblogEntry, and WikiPage object types are excluded from the Possible Objects menu. To exclude additional object types from the menu, open the <DSHome>/config/LifecycleManager.properties file and add other object types to the excludeLCMObjectsList field.

4. In the **Possible Properties** field, select the properties that you want to appear in email notifications and click the **Add** button. To select multiple properties, use the CTRL key (Windows) or the Command key (Macintosh).

5. In the **Selected Properties** field, select the properties that you do not want to appear in email notifications and click the **Remove** button. To select multiple properties, use the CTRL key (Windows) or the Command key (Macintosh).

6. To reorder the properties in the **Selected Properties** field, select a property and do one of the following:

   – To move the property before another property, click **Move Up**.

   – To move the property after another property, click **Move Down**.

7. Click **Apply**.

8. To configure other object types, repeat these steps.