

Content Manager OnDemand
Version 10 Release 5

Enhanced Retention Management Guide



Note

Before using this information and the product it supports, read the information in [“Notices” on page 27.](#)

This edition applies to the following products and to all subsequent releases and modifications until otherwise indicated in new editions:

- Version 10 Release 5 of IBM® Content Manager OnDemand for Multiplatforms (product number 5724-J33)
- Version 10 Release 5 of IBM Content Manager OnDemand for z/OS® (product number 5697-CM1)
- Version 7 Release 3 of IBM Content Manager OnDemand for i (product number 5770-RD1)

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Support and assistance

From ibm.com, click **Support & downloads** and select the type of support that you need. From the Support Portal, you can search for product information, download fixes, open service requests, and access other tools and resources.

IBM Knowledge Center

See your online product information in IBM Knowledge Center at one of the following locations:

- For IBM Content Manager OnDemand for Multiplatforms, see <https://www.ibm.com/support/knowledgecenter/SSEPCD>
- For IBM Content Manager OnDemand for z/OS, see <https://www.ibm.com/support/knowledgecenter/SSQHWE>

PDF publications

See the following web sites for PDF publications for your product:

- For IBM Content Manager OnDemand for Multiplatforms, see <https://www.ibm.com/support/pages/node/1079037>.
- For IBM Content Manager OnDemand for z/OS, see <https://www.ibm.com/support/pages/node/1079043>.

Contacting IBM

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For more information about how to contact IBM, including TTY service, see the Contact IBM website at <http://www.ibm.com/contact/us/>.

Chapter 1. Enhanced Retention Management

The IBM Content Manager OnDemand Enhanced Retention Management feature helps you manage and enforce retention of documents in a Content Manager OnDemand system.

In a Content Manager OnDemand system, you retain documents for a specific amount of time. Retaining documents for a certain amount of time is commonly referred to as retention management.

Records management describes the process of retaining and deleting documents under a set of circumstances that are not necessarily bounded by time, for example, until the end of litigation. Without the Enhanced Retention Management feature, Content Manager OnDemand cannot implement records management for the following reasons:

- Records management requires that you have control over individual documents. However, Content Manager OnDemand manages application groups, not individual documents, and it works with a storage manager to delete (expire) documents.
- Records management requires flexibility in defining when to delete documents. However, Content Manager OnDemand defines the time to delete application groups with fixed time ranges, for example, five years after Content Manager OnDemand loads documents.

To overcome these limitations, you can purchase and install the Enhanced Retention Management feature. With the Enhanced Retention Management feature, you can control individual documents by introducing *holds*, a way to identify the documents that you want to keep for some period of time. To expire the document, you need to remove the hold. Holds give you flexibility to choose when to delete documents because you control when to remove a hold. Therefore, you control when to delete a document. You can manage holds through any of the following interfaces:

- OnDemand Windows clients, IBM Content Navigator, ARSDOC command, or ODWEK Java™ APIs provided by Content Manager OnDemand.
- FileNet® P8 when you integrate it with Content Manager OnDemand by enabling the Content Federation Services-Content Manager OnDemand (CFS-CMOD) integration feature. The CFS-CMOD integration feature also helps you federate Content Manager OnDemand repositories, which connects your Content Manager OnDemand content to business process management (BPM) and records management features of FileNet P8.)

The Enhanced Retention Management feature also requires that you disable the expiration processes that your storage manager has on the documents that you want to hold. Disabling the expiration process prevents the storage manager from deleting these documents.

Do not enable Enhanced Retention Management if your documents are stored exclusively in a cache-only storage node. Documents that are stored in cache could be expired even if there is a hold placed on a document and the Life of Data and Indexes value has been reached. On IBM i servers, this means that the migration policy specified in the application group definition to which the documents belong must have at least one migration policy level with a media type other than Expire, so that the Archived Storage Manager (ASM) manages the data.

You can create the following types of holds:

Holds

You indicate, through the use of searches, the specific documents that you want to hold. You can apply holds to documents in any application group. Use this type of hold if you are using Content Manager OnDemand as your retention management tool.

Implied holds

When Content Manager OnDemand loads documents, it applies a hold to all the documents in that load. You can apply this type of hold only to documents in new application groups. Use this type of hold if you are using another solution as your retention management tool.

Holds provide the following flexibility:

- You can create multiple holds.

- You can apply multiple holds to a single document or documents.
- You can apply a single hold to an unlimited number of documents.
- You can place a hold on a document that is currently stored in your OnDemand system.
- You can place a hold on a document when it is loaded into your OnDemand system.

For example, you create the following holds:

- A hold called **A** to apply it to documents that are part of a litigation.
- An implied hold called **B** to apply it to documents to comply with a government regulation and you use another solution to manage all documents subject to this regulation.
- A hold called **C** to apply it to documents that are part of an internal policy.

You can place holds **A** and **C** on a single document. The document will not be expired until you remove all holds. You can apply hold **A** to documents in different application groups. You can apply implied hold **B** to documents you are loading to your OnDemand system. A week later, when you search for more documents for the litigation, you can apply hold **A** to documents that also have implied hold **B**. The documents will not be expired until you remove all holds.

After you install the Enhanced Retention Management feature, evaluate your Content Manager OnDemand maintenance procedures. During Content Manager OnDemand maintenance cycles, loads are deleted per your expiration policy. However, if a document in that load has a hold, Content Manager OnDemand will not delete that load. Keeping the document can have the following consequences:

- Your OnDemand Storage Manager might consume space faster than you initially planned.
- Keeping the other documents that do not have a hold in that load makes them potentially discoverable.
- When you run **arsmaint** or Disk Storage Manager, Content Manager OnDemand might repeatedly reload these loads, causing unnecessary strain on your system.

The following commands can help you manage some of these consequences:

- **Multiplatforms** **z/OS** **ARSMaint** and **ARSADMIN UNLOAD**, specifying the **-D** parameter
- **IBM i** **STRDSMOND** command, specifying the **HLDTHLD** parameter

With these commands, you specify how full a load must be before it can be reloaded, at which point Content Manager OnDemand deletes the documents that do not have holds and reloads the load.

Chapter 2. Preparing your system

Review your infrastructure and the prerequisites for the Enhanced Retention Management feature to ensure your system is ready.

Reviewing your existing hardware capacity and software capabilities

You must use a version Content Manager OnDemand that supports the Enhanced Retention Management feature. You must monitor your OnDemand Storage Manager and processing that used by Content Manager OnDemand to determine whether you need to increase your storage capacity.

About this task

After you complete this task, you will know whether your existing systems meet the hardware and software requirements and you will understand why you need to monitor your system to determine whether you need to add more storage capacity.

Procedure

To prepare your system:

1. Verify that you installed a version of Content Manager OnDemand that supports the Enhanced Retention Management feature.
2. Prepare to monitor your OnDemand Storage Manager and processing that is used by Content Manager OnDemand and make the appropriate changes.

Hold might create the following consequences:

- OnDemand Storage Manager might use storage faster than before you started using holds because of the longer retention periods for some documents.
- When you run **arsmaint** or Disk Storage Manager, Content Manager OnDemand might repeatedly reload loads; therefore, it might use more system processing.

Installing Enhanced Retention Management

The Enhanced Retention Management feature is a feature you order separately.

Procedure

To install Enhanced Retention Management:

1. Install the Enhanced Retention Management feature by reviewing one of the following documents that corresponds to the Content Manager OnDemand product that you use:
 - For Content Manager OnDemand for Multiplatforms, see the Content Manager OnDemand Enhanced Retention Management for Multiplatforms DVD. The following list describes the command to start the installation program for the corresponding platform:
 - For AIX® and Linux, enter one of the following commands: `./oderm` or `./oderm -i console`
 - For Windows, enter the following command: `x:\windows\odermwin.exe`
 - For Content Manager OnDemand for z/OS, see *Program Directory for IBM Content Management OnDemand Enhanced Retention Manager for z/OS*.
 - For Content Manager OnDemand for i, see *Common Server Planning and Installation Guide*.
2. Configure the Enhanced Retention Management feature by doing one of the following steps:
 - For all platforms other than Windows, add `ARS_SUPPORT_HOLD=1` to the `ars.cfg` file.
 - For Windows, use the OnDemand Configurator V10.5 to configure:

- a. Start the OnDemand Configurator V10.5 by clicking **Start > All Programs > IBM OnDemand Server V10.5 > OnDemand Configurator V10.5**.
- b. Right-click an instance.
- c. Select **Properties/Server**.
- d. Click **Advanced Options** and select **Enable Enhanced Retention Management**.
- e. Click **OK**.

Chapter 3. Implementing your enhanced retention management system

Configure Content Manager OnDemand to identify documents in application groups that you want to retain (hold) and identify the users who can manage holds. You must disable expiration processes by the storage manager so that it cannot expire data. You must also convert application groups with an expiration type of DOCUMENT, SEGMENT, or STORAGE MANAGER to an expiration type of LOAD.

Identifying application groups

For holds, identify the application groups that contain the documents that you want to save. You need to modify these application groups to apply holds on those documents. For implied holds, which you can apply to documents only as they are being loaded into Content Manager OnDemand, plan on how you will identify these application groups so that when you create them, you configure them correctly.

Disabling existing storage manager's ability to expire data

If there are holds on your document, you must disable your storage manager's ability to delete the documents. The specific instructions on how to disable your storage manager depend on the storage manager that you are using.

Content Manager OnDemand supports the following storage managers. See the documentation for each product for instructions on disabling that storage manager's ability to delete documents:

- Amazon S3
- Apache HDFS
- Archived Storage Manager (ASM)
- IBM Cloud Object Storage
- Microsoft Azure
- Object Access Method (OAM)
- OpenStack Swift
- Tivoli® Storage Manager
- Virtual Storage Access Method (VSAM)

Converting application groups to type LOAD

If application groups do not have an expiration type of LOAD, plan for time to convert those application groups from expiration types of DOCUMENT, SEGMENT, or STORAGE MANAGER to LOAD. Contact your IBM representative about engaging IBM ECM services to assist with this conversion.

Configuring existing application groups to use holds

By default, application groups do not use Enhanced Retention Management. For any application groups that contain documents you want to hold, you must change that application group to use Enhanced

Retention Management. Remember that implied holds can be applied only to documents in new application groups, not existing application groups.

Procedure

Do the following steps:

1. Start the OnDemand Administrator V10.5 by clicking **Start > All Programs > IBM OnDemand Clients V10.5 > OnDemand Administrator V10.5**.
2. Click **Application Groups**.
3. Right-click the application group you want to modify, then select **Update**.
4. Click the **Field Definition** tab.
5. In the **Database Field Name** field, type in a name that helps you identify documents that have holds, for example, LockDown. Click **Add**.
6. Click the **Field Information** tab.
7. From the **Name** list, select the field that you created in step “5” on page 6.
8. From the **Data Type** list, select Small Int (2).
9. Select the **Lockdown** check box.
10. Click the **General** tab, then click **Advanced**.
11. In the **Enhanced Retention Management** area, click **Yes**. Click **OK** twice.

Related tasks

[Configuring new application groups to use holds or implied holds](#)

By default, application groups do not use Enhanced Retention Management. When you create an application group, you can configure the application group to use Enhanced Retention Management and indicate which type of hold you want to use.

Configuring new application groups to use holds or implied holds

By default, application groups do not use Enhanced Retention Management. When you create an application group, you can configure the application group to use Enhanced Retention Management and indicate which type of hold you want to use.

Procedure

Do the following steps:

1. Start the OnDemand Administrator V10.5 by clicking **Start > All Programs > IBM OnDemand Clients V10.5 > OnDemand Administrator V10.5**.
2. Right-click **Application Groups** and select **New Application Group**.
3. Type in a name and short description, then click the **Field Definition** tab.
4. In the **Database Field Name** field, type in a name that helps you identify documents that have holds, for example, LockDown. Click **Add**.
5. Click **Add**, then click the **Field Information** tab.
6. From the **Name** list, select the field you created in step “4” on page 6.
7. From the **Data Type** list, select Small Int (2).
8. Select the **Lockdown** check box.
9. Click the **General** tab, then click **Advanced**.
10. In the **Enhanced Retention Management** area, click **Yes**. If you want to use implied holds, select the **Implied hold** check box. Click **OK**.
11. Optional: Configure the application group with other options, then click **OK**.

Related tasks

[Configuring existing application groups to use holds](#)

By default, application groups do not use Enhanced Retention Management. For any application groups that contain documents you want to hold, you must change that application group to use Enhanced Retention Management. Remember that implied holds can be applied only to documents in new application groups, not existing application groups.

Configuring application group permissions

Indicate that holds can be applied to documents in an application group by adding the Hold permission.

Procedure

Do the following steps:

1. Start the OnDemand Administrator V10.5 by clicking **Start > All Programs > IBM OnDemand Clients V10.5 > OnDemand Administrator V10.5**.
2. Click **Application Groups**.
3. Right-click the application group you want to modify.
4. Select **Update**.
5. Click the **Permissions** tab.
6. Select the user or user groups to have permission to apply holds.
 - If you want to select a user or user group that already has application group permissions, select the name of the user or user group from the **Defined** list.
 - If you want to select a user or user group that does not have application group permissions, select the name of the user or user group from the **Users/Groups** list.
7. In the **Document** area, select the **Hold** check box.
8. If you selected a user or user group that does not have application group permissions, click **Add**. Click **OK**.

Configure user permissions

Give selected users the authority to manage holds by either creating a user type of Hold Administrator or giving the user Create Holds authority.

Procedure

Do the following steps:

1. Start the OnDemand Administrator V10.5 by clicking **Start > All Programs > IBM OnDemand Clients V10.5 > OnDemand Administrator V10.5**.
2. Click **Users**.
3. Provide users the authority to manage holds by either designating them as Hold Administrators or giving them Create Holds authority.

You can provide the authority by updating an existing user or creating a user.

- If you want to designate a user as the Hold Administrator, in the **User Type** area, select **Application Group/Folder/Cabinet Administrator** and the **Hold Administrator** check box.
- If you want to give users the Create Holds authority, select the **Create Holds** check box in the **Authority** area.

Configuring folders

If you want the Windows clients to display a lock icon next to a document, modify the folder.

Procedure

To configure folders:

1. Start the OnDemand Administrator V10.5 by clicking **Start > All Programs > IBM OnDemand Clients V10.5 > OnDemand Administrator V10.5**.
2. Click **Folders**.
3. Right-click the folder that you want to modify and select **Update**.
4. In the **General** tab, select the **Display Document Hold** check box.
5. To enable users to search for documents with holds, do the following steps:
 - a) Click the **Field Definition** tab.
 - b) Type in the name of the field and a short description.
 - c) Select Hold from the **Field Type** list, then click **Add**.
6. Click **OK**.

Defining holds through the OnDemand Administrator client

To define a hold, you create the hold and identify who can access, update, or delete that hold.

Before you begin

To define a hold, you must be a System Administrator, a Hold Administrator, or a user with Create Holds authority.

About this task

The following table describes how defining holds through the OnDemand Administrator V10.5 differs from defining holds through the OnDemand Windows client: Compares the differences between defining holds with the OnDemand Administrator V10.5 and the OnDemand Windows client.

OnDemand Administrator V10.5	OnDemand Windows client
<p>When you define the hold, you create the following effects:</p> <ul style="list-style-type: none">• You give a user or user group permission to access, update, or delete the hold.• You are not applying the hold to any documents.	<p>When you define the hold, you are also applying it to documents you selected.</p>

Procedure

Do the following steps:

1. Start the OnDemand Administrator V10.5 by clicking **Start > All Programs > IBM OnDemand Clients V10.5 > OnDemand Administrator V10.5**.
2. Right click **Holds** and select **New Hold**.
3. Type in a name for the hold in the **Name** field and enter a brief description in the **Description** field.
4. Click the **Permissions** tab.
5. Select the user or group from the **Users/Groups** list.
6. Specify who can view, update, or delete the hold.
 - To provide a user or group the ability to view the hold, select the **Access** check box in the **Authority** area.

- To provide a user or group the authority to update or delete the hold, select the **Administrator** check box in the **Authority** area.
7. Click **Add**, then click **OK**.
 8. If you want to define another hold, return to step “2” on page 8.

Related tasks

Defining a new hold through the OnDemand Windows™ client

To define a new hold, you create a name to identify the hold from a list of documents.

Defining a new hold through the OnDemand Windows™ client

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When you define the hold, you create the following effects: <ul style="list-style-type: none"> • You give a user or user group permission to access, update, or delete the hold. • You are not applying the hold to any documents. 	When you define the hold, you are also applying it to documents you selected.

Procedure

Do the following steps

1. Start the OnDemand client by clicking **Start > All Programs > IBM OnDemand Clients V10.5 > OnDemand Client V10.5**.
2. Log in to your OnDemand server.
3. Search for the documents you want to hold.
4. In the **Search Criteria and Document List** window, select all the documents you want to hold.
5. Right click the highlighted documents.
6. Click **Apply Hold for All Selected**.
7. In the **Apply a Hold to a Document(s)** window, click **Create New Hold**.
8. In the **Create New Hold** window, type in the name of the hold in the **Name** field and type in a description of the hold in the **Description** field.
9. Click **Create**.
10. Click **Apply**.

Related tasks

Defining holds through the OnDemand Administrator client

To define a hold, you create the hold and identify who can access, update, or delete that hold.

Chapter 4. Managing your holds

Holds can be applied and released with the Windows client, IBM Content Navigator, ODWEK Java APIs, and ARSDOC. You can also search for holds.

Applying holds by using the Windows™ client

While viewing a list of documents in the Windows client, you can select some or all the documents and apply holds to the selected documents.

Procedure

To apply holds by using the Windows client:

1. Start the OnDemand client by clicking **Start > All Programs > IBM OnDemand Clients V10.5 > OnDemand Client V10.5**.
2. Log in to your OnDemand server.
3. Search for the documents you want to hold.
4. In the **Search Criteria and Document List**, select all the documents that you want to hold.
5. Right-click the highlighted documents.
6. Click **Apply Hold for All Selected**.
7. In the **Apply a Hold to a Document(s)**, select the hold you want to apply to the selected documents.
8. Click **Apply**.

Related tasks

[Applying holds with the ARSDOC command](#)

Apply holds by using the **ARSDOC hold_add** command. You can specify the parameters at the command line or through a parameter file.

[Releasing holds using the Windows client](#)

When you no longer want to retain a document, you must release the hold on that document.

[Releasing holds using the ARSDOC command](#)

When you no longer want to retain a document, you must release the hold on that document.

[Searching based on hold name](#)

You can create a folder that is dedicated to displaying documents that have holds applied to them. This folder can help you quickly find those documents. The folder must contain the application groups that contain those documents.

[Viewing holds applied to a document](#)

While viewing a list of documents in the OnDemand Windows client, you can check which holds are applied to a document.

Applying holds with the ARSDOC command

Apply holds by using the **ARSDOC hold_add** command. You can specify the parameters at the command line or through a parameter file.

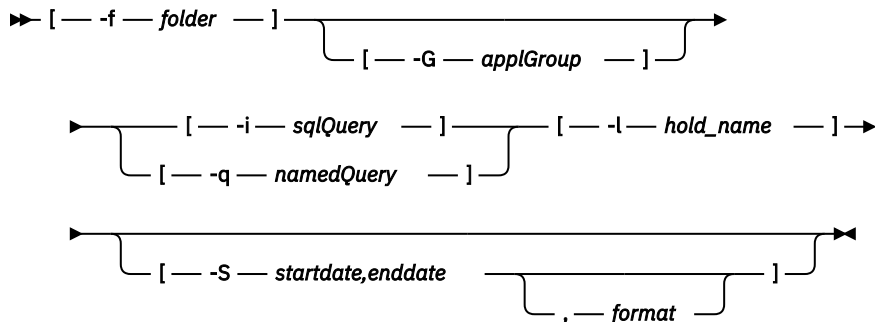
About this task

If a duplicate attempt is made to add the same documents to a hold, no error occurs, and the **ARSDOC** command displays a success message. However, the system log might contain messages that indicate that the documents were already added.

Procedure

To apply holds by using the **ARSDOC hold_add** command:

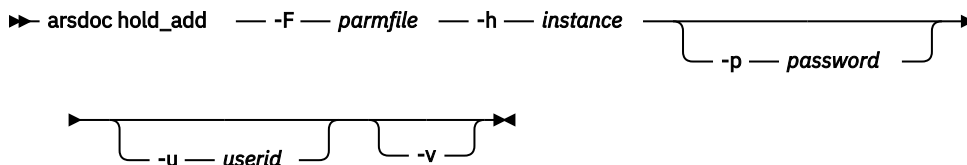
1. If you want to store the options for the ARSDOC command in a parameter file, specify the options by using the following syntax:



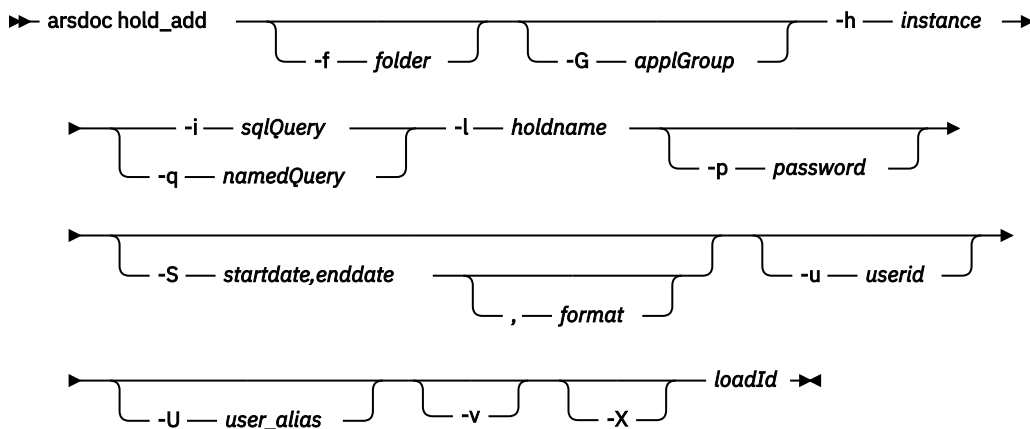
2. Run the **arsdoc hold_add** command.

IBM i If you are running this command on i, run the command in Qshell.

- If you are using a parameter file, enter the **arsdoc hold_add** command by using the following syntax:



- If you are not using a parameter file, enter the **arsdoc hold_add** command by using the following syntax:



Results

You can verify the results by doing any of the following tasks:

- Review the system log.
- Start the Windows client, search for the hold, and verify that the documents are held.

Related tasks

[Applying holds by using the Windows™ client](#)

While viewing a list of documents in the Windows client, you can select some or all the documents and apply holds to the selected documents.

[Releasing holds using the Windows client](#)

When you no longer want to retain a document, you must release the hold on that document.

Releasing holds using the ARSDOC command

When you no longer want to retain a document, you must release the hold on that document.

Searching based on hold name

You can create a folder that is dedicated to displaying documents that have holds applied to them. This folder can help you quickly find those documents. The folder must contain the application groups that contain those documents.

Viewing holds applied to a document

While viewing a list of documents in the OnDemand Windows client, you can check which holds are applied to a document.

Releasing holds using the Windows client

When you no longer want to retain a document, you must release the hold on that document.

Procedure

Release holds by doing the following steps:

1. Start the OnDemand client by clicking **Start > All Programs > IBM OnDemand Clients V10.5 > OnDemand Client V10.5**.
2. Log in to your OnDemand server.
3. Search for the documents you want to release.
4. In the **Search Criteria and Document List**, select all the documents you want to release.
5. Right-click the highlighted documents.
6. Click **Release Hold for All Selected**.
7. In the **Release Document(s) from a Hold**, select the hold that you want to release.
8. Click **Release**.

Related tasks

Applying holds by using the Windows™ client

While viewing a list of documents in the Windows client, you can select some or all the documents and apply holds to the selected documents.

Applying holds with the ARSDOC command

Apply holds by using the **ARSDOC hold_add** command. You can specify the parameters at the command line or through a parameter file.

Releasing holds using the ARSDOC command

When you no longer want to retain a document, you must release the hold on that document.

Searching based on hold name

You can create a folder that is dedicated to displaying documents that have holds applied to them. This folder can help you quickly find those documents. The folder must contain the application groups that contain those documents.

Viewing holds applied to a document

While viewing a list of documents in the OnDemand Windows client, you can check which holds are applied to a document.

Releasing holds using the ARSDOC command

When you no longer want to retain a document, you must release the hold on that document.

About this task

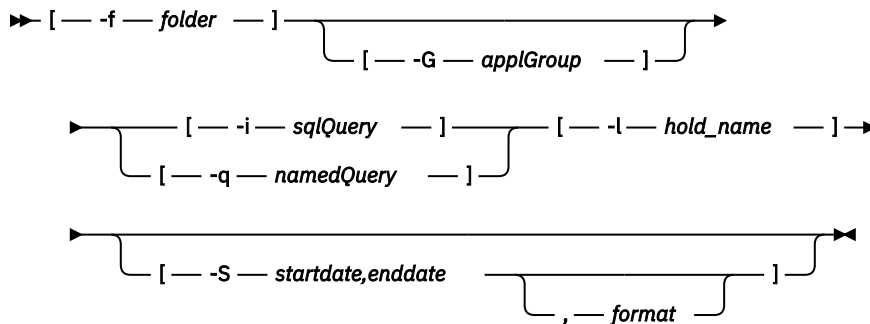
If a duplicate attempt is made to remove the same documents from a hold, no error occurs, and the **ARSDOC** command displays a success message. However, the system log might contain messages that indicate that the documents were already released.

For best performance when removing documents from an IMPLIED_HOLD, it is recommended that you use the SQL query (-i) parameter instead of the load ID (-X) parameter to determine the documents that should be removed from the hold. For example, you might specify -i "WHERE doc_name LIKE '2FAA%'" to remove holds on all documents where the doc_name_prefix portion of the load ID starts with 2FAA. To determine the doc_name_prefix, find the load ID of the document(s), which is in the format of agid-pri_nid-sec_nid-doc_name_prefix-start_dt-stop_dt-appid. For example, if the load ID is 770659-1-0-2FAA-19960313000000-19980313000000-770660, the doc_name_prefix is 2FAA, so the SQL query would be "WHERE doc_name LIKE '2FAA%'".

Procedure

To release holds by using the **ARSDOC** command:

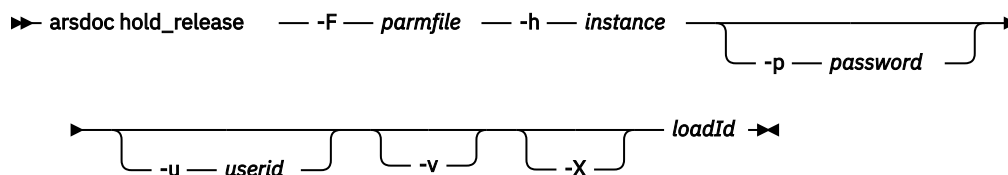
1. If you want to store the options for the ARSDOC command in a parameter file, specify the options by using the following syntax:



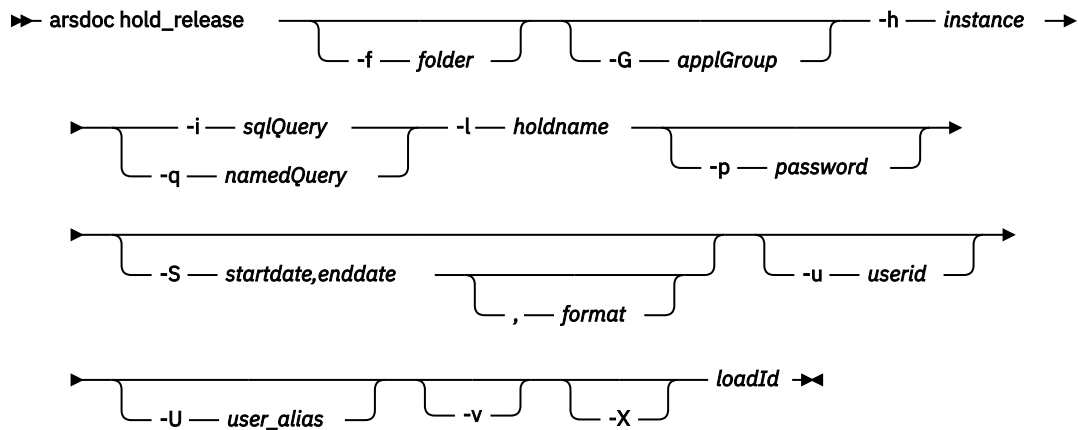
2. Run the **arsdoc hold_release** command.

IBM i If you are running this command on i, run the command in Qshell.

- If you are using a parameter file, enter the **arsdoc hold_release** command by using the following syntax:



- If you are not using a parameter file, enter the **arsdoc hold_release** command by using the following syntax:



Results

You can verify the results by doing any of the following tasks:

- Review the system log.
- Start the Windows client, search for the hold, and verify that the documents were released.

Related tasks

Applying holds by using the Windows™ client

While viewing a list of documents in the Windows client, you can select some or all the documents and apply holds to the selected documents.

Applying holds with the ARSDOC command

Apply holds by using the **ARSDOC hold_add** command. You can specify the parameters at the command line or through a parameter file.

Releasing holds using the Windows client

When you no longer want to retain a document, you must release the hold on that document.

Searching based on hold name

You can create a folder that is dedicated to displaying documents that have holds applied to them. This folder can help you quickly find those documents. The folder must contain the application groups that contain those documents.

Viewing holds applied to a document

While viewing a list of documents in the OnDemand Windows client, you can check which holds are applied to a document.

Searching based on hold name

You can create a folder that is dedicated to displaying documents that have holds applied to them. This folder can help you quickly find those documents. The folder must contain the application groups that contain those documents.

Procedure

To create a folder that displays documents with holds:

1. Start the OnDemand Administrator V10.5 by clicking **Start > All Programs > IBM OnDemand Clients V10.5 > OnDemand Administrator V10.5**.
2. Right-click **Folders** and select **New Folder**.
3. Type in a name for the folder in the **Name** field and a brief description of the folder in the **Description** field.
4. Select all the application groups you want to include in this folder by highlighting them in the **Application Groups** list.

5. Click **Add**.

The OnDemand Administrator client displays your selections in the **Selected** list.

6. Select the **Field Definition** tab.

7. Type in the name of a field to identify the holds field; for example, Ho1ds.

8. Select **Hold** in the **Field Type** list.

9. Select any other options you want for this folder in the other tabs, then click **OK**.

Related tasks

Applying holds by using the Windows™ client

While viewing a list of documents in the Windows client, you can select some or all the documents and apply holds to the selected documents.

Applying holds with the ARSDOC command

Apply holds by using the **ARSDOC hold_add** command. You can specify the parameters at the command line or through a parameter file.

Releasing holds using the Windows client

When you no longer want to retain a document, you must release the hold on that document.

Releasing holds using the ARSDOC command

When you no longer want to retain a document, you must release the hold on that document.

Viewing holds applied to a document

While viewing a list of documents in the OnDemand Windows client, you can check which holds are applied to a document.

Viewing holds applied to a document

While viewing a list of documents in the OnDemand Windows client, you can check which holds are applied to a document.

Procedure

Do the following steps:

1. Start the OnDemand client by clicking **Start > All Programs > IBM OnDemand Clients V10.5 > OnDemand Client V10.5**.
2. Double-click a folder you want to review.
3. Enter the search criteria and click **Search**.
4. In the **Document List** box, for any document that displays the lock icon, right-click on the document and select **Show Holds**.
5. Close the folder when you are done reviewing.

Related tasks

Applying holds by using the Windows™ client

While viewing a list of documents in the Windows client, you can select some or all the documents and apply holds to the selected documents.

Applying holds with the ARSDOC command

Apply holds by using the **ARSDOC hold_add** command. You can specify the parameters at the command line or through a parameter file.

Releasing holds using the Windows client

When you no longer want to retain a document, you must release the hold on that document.

Releasing holds using the ARSDOC command

When you no longer want to retain a document, you must release the hold on that document.

Searching based on hold name

You can create a folder that is dedicated to displaying documents that have holds applied to them. This folder can help you quickly find those documents. The folder must contain the application groups that contain those documents.

Chapter 5. Uninstalling Enhanced Retention Management

Uninstalling Enhanced Retention Management does not release holds or delete documents. Holds remain until you release them.

To uninstall the Content Manager OnDemand Enhanced Retention Management feature on AIX, Linux, or Linux on System z®, enter one of the following commands:

- `CMOD_server_directory/_uninst1010erm/uninstalloderm`
- `CMOD_server_directory/_uninst1010erm/uninstalloderm -i -console`

To uninstall the Content Manager OnDemand Enhanced Retention Management feature on Windows, use the Windows **Add/Remove programs** feature.

To uninstall the Content Manager OnDemand Enhanced Retention Management feature on IBM i, enter the following command: `DLTLICPGM LICPGM(5770RD1) OPTION(14)`

Appendix A. Content Manager OnDemand integration with FileNet P8

You can integrate Content Manager OnDemand with IBM Enterprise Records or IBM Case Foundation to do records management initiative or business process management. You can integrate your Content Manager OnDemand content by installing Content Federation Services for Content Manager OnDemand (CFS-CMOD).

Table 1 on page 21 describes the differences in prerequisites and operation between Enhanced Retention Management, IBM Enterprise Records, and IBM Case Foundation.

Table 1. Comparing prerequisites and behavior between Enhanced Retention Management, IBM Enterprise Records, and IBM Case Foundation

	Enhanced Retention Management	IBM Enterprise Records	IBM Case Foundation
Requires that you purchase and install Enhanced Retention Management feature of Content Manager OnDemand	Yes	No	No
Requires that you enable Content Federation Services for Content Manager OnDemand	No	Yes	Yes
How do you delete a document stored in Content Manager OnDemand?	By removing a hold through one of several interfaces provided by Content Manager OnDemand	By destroying a record through the IBM Enterprise Records interface	Not supported. You can only view documents.

If you are using more than one of these solutions, Content Manager OnDemand manages the number of holds and locks that are applied to a document. OnDemand does not delete documents until all holds and locks are removed.

Do not enable Enhanced Retention Management or Enterprise Records if your documents are stored exclusively in a cache-only storage node. Documents that are stored in cache could be expired even if there is a hold placed on a document and the Life of Data and Indexes value has been reached, or if they are declared as records in Enterprise Records. On IBM i servers, this means that the migration policy specified in the application group definition to which the documents belong must have at least one migration policy level with a media type other than Expire, so that the Archived Storage Manager (ASM) manages the data.

If you are not familiar with IBM Enterprise Records, IBM Case Foundation, or Content Federation Services for Content Manager OnDemand, review the following sources of information:

- To learn more about IBM Enterprise Records and how you can use it to manage Content Manager OnDemand documents, see *Records Management* in the FileNet P8 information center.
- To learn more about IBM Case Foundation (BPM) and how it can access Content Manager OnDemand documents, see *Workplace XT and Workplace* in the FileNet P8 information center.
- To understand how Content Federation Services federates documents from Content Manager OnDemand and other sources, see *Content Federation Services overview* in the FileNet P8 information center.

Preparing your system

Monitor your system for increases in storage consumption and system processing. If you are not familiar with FileNet P8 software, review the FileNet P8 information center.

Prepare to monitor your system

Adding holds or locks to your documents might require an increase in storage capacity.

Plan to monitor OnDemand Storage Manager and processing used by Content Manager OnDemand and prepare to make appropriate changes. Holds and locks might create the following consequences:

- OnDemand Storage Manager might use storage faster than before you started using holds or locks due to the longer retention periods for some documents.
- When you run **arsmaint** or Disk Storage Manager, Content Manager OnDemand might repeatedly reload loads. Therefore, it might use more system processing.

Enabling the Content Federation Services for Content Manager OnDemand feature

Content Federation Services for Content Manager OnDemand enables communication between Content Manager OnDemand and FileNet P8. By default, support for Content Federation Services for Content Manager OnDemand is not enabled.

Procedure

To enable the Content Federation Services for Content Manager OnDemand feature:

1. For all platforms other than Windows, add `ARS_SUPPORT_HOLD=1` to the `ars.cfg` file.
2. For Windows, use the Windows Configurator.
 - a. Start the Windows configurator by clicking **Start > All Programs > IBM OnDemand Server V10.5 > OnDemand Configurator V10.5**.
 - b. Right-click an instance.
 - c. Select **Properties/Server**.
 - d. Click **Advanced Options**, select **Enable CFS-CMOD**, then click **OK**.
3. Restart the OnDemand instance.

Configuring Content Manager OnDemand to work with IBM Enterprise Records

The tasks you do to configure Content Manager OnDemand to work with IBM Enterprise Records are similar to the tasks to enable Enhanced Retention Management. Additional steps include specifying options when you configure application groups that enable integration with FileNet P8.

Identifying application groups

You must modify any existing application groups that contain documents you want to retain. Plan on how to identify new application groups that contain documents you want to save and configure those application groups correctly when you create them.

Disabling existing storage manager's ability to expire data

If there are holds on your document, you must disable your storage manager's ability to delete the documents. The specific instructions on how to disable your storage manager depend on the storage manager that you are using.

Content Manager OnDemand supports the following storage managers. See the documentation for each product for instructions on disabling that storage manager's ability to delete documents:

- Amazon S3

- Apache HDFS
- Archived Storage Manager (ASM)
- IBM Cloud Object Storage
- Microsoft Azure
- Object Access Method (OAM)
- OpenStack Swift
- Tivoli Storage Manager
- Virtual Storage Access Method (VSAM)

Converting application groups to type LOAD

If application groups do not have an expiration type of LOAD, plan for time to convert those application groups from expiration types of DOCUMENT, SEGMENT, or STORAGE MANAGER to LOAD. Contact your IBM representative about engaging IBM ECM services to assist with this conversion.

Configuring existing application groups to work with FileNet P8

By default, application groups do not work with FileNet P8. For any existing application groups that contain documents that you want FileNet P8 to manage, you must change that application group to work with FileNet P8.

Procedure

To configure existing application groups to work with FileNet P8:

1. Start the OnDemand Administrator V10.5 by clicking **Start > All Programs > IBM OnDemand Clients V10.5 > OnDemand Administrator V10.5**.
2. Click **Application Groups**.
3. Right-click the application group you want to modify, then select **Update**.
4. Select **Update**, then click **Advanced**.
5. Click **Yes** in the **Interoperate with FileNet P8 Platform** check box.
6. Select whether you want metadata sent to FileNet P8 automatically and whether Content Manager OnDemand should assume that FileNet P8 controls the expiration process.

The following list describes each option:

- Select the **Federate documents automatically** check box when you want Content Manager OnDemand to send metadata to FileNet P8 when it loads data into this application group.
 - Select the **Enable Records Manager to declare records automatically** check box when you want Content Manager OnDemand to assume that FileNet P8 controls the expiration process. Select this option if you want to improve performance between FileNet P8 and Content Manager OnDemand. If you do not select this option, every time FileNet P8 locks a document that is stored in Content Manager OnDemand, FileNet P8 sends a notification to Content Manager OnDemand. Many requests might be sent, which increases consumption of system resources.
7. Click **OK** twice.

Configuring new application groups to work with FileNet P8

By default, application groups do not work with FileNet P8. When you create a new application group, you can configure the application group to work with FileNet P8.

Procedure

To configure new application groups to work with FileNet P8:

1. Start the OnDemand Administrator V10.5 by clicking **Start > All Programs > IBM OnDemand Clients V10.5 > OnDemand Administrator V10.5**.
2. Right-click **Application Groups** and select **New Application Group**.

3. Click the **General** tab, then click **Advanced**.
4. Click **Yes** in the **Interoperate with FileNet P8 Platform** check box.
5. Select whether you want metadata sent to FileNet P8 automatically and whether Content Manager OnDemand should assume that FileNet P8 controls the expiration process.

The following list describes each option:

- Select the **Federate documents automatically** check box when you want Content Manager OnDemand to send metadata to FileNet P8 when it loads data into this application group.
 - Select the **Enable Records Manager to declare records automatically** check box when you want Content Manager OnDemand to assume that FileNet P8 controls the expiration process. Select this option if you want to improve performance between FileNet P8 and Content Manager OnDemand. If you do not select this option, every time FileNet P8 locks a document that is stored in Content Manager OnDemand, FileNet P8 sends a notification to Content Manager OnDemand. Many requests might be sent, which increases consumption of system resources.
6. Click **OK**.
 7. Optional: Configure the application group with other options, then click **OK**.
 8. Click **OK**.

Configuring application group fields

Create a field that identifies the documents being federated. If a lock or hold is applied to a document, Content Manager OnDemand adjusts the value of the field to indicate how many holds or locks are applied.

Procedure

To configure application group fields:

1. Start the OnDemand Administrator V10.5 by clicking **Start > All Programs > IBM OnDemand Clients V10.5 > OnDemand Administrator V10.5**.
2. Click **Application Groups**.
3. Right-click the application group you want to modify, then select **Update**.
4. Select **Update**.
5. Click the **Field Definition** tab.
6. Type in the name of a field that helps you identify documents being held, for example RMLockDown, then click **Add**.
7. Click the **Field Information** tab.
8. Select the field you created in step “6” on page 24 from the **Name** list.
9. In the **Type** list, select **Filter**.
10. From the **Data Type** list, select **Small Int (2)**.
11. Select the **CFS-CMOD** check box, then click **OK**.

Configuring application group permissions

Indicate that documents in an application group can be federated by adding the CFS-CMOD permission and who can federate the documents in the application group.

Procedure

To configure application group permissions:

1. Start the OnDemand Administrator V10.5 by clicking **Start > All Programs > IBM OnDemand Clients V10.5 > OnDemand Administrator V10.5**.
2. Click **Application Groups**.
3. Right-click the application group you want to modify, then select **Update**.
4. Select **Update**.

5. Click the **Permissions** tab.
6. Select the user or user groups to have permission to federate documents.
 - If you want to select a user or user group that already has application group permissions, select the name of the user or user group from the **Defined** list.
 - If you want to select a user or user group that does not have application group permissions, select the name of the user or user group from the **Users/Groups** list.
7. In the **Document** area, select the **CFS-CMOD** check box.
8. If you selected a user or user group that does not have application group permissions, click **Add**. Click **OK**.

Configuring folders

If you want the Windows clients to display a lock icon next to a document, modify the folder.

Procedure

To configure folders:

1. Start the OnDemand Administrator V10.5 by clicking **Start > All Programs > IBM OnDemand Clients V10.5 > OnDemand Administrator V10.5**.
2. Click **Folders**.
3. Right-click the folder that you want to modify and select **Update**.
4. In the **General** tab, select the **Display Document Hold** check box.
5. To enable users to search for documents with holds, do the following steps:
 - a) Click the **Field Definition** tab.
 - b) Type in the name of the field and a short description.
 - c) Select Ho1d from the **Field Type** list, then click **Add**.
6. Click **OK**.

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