Import Agent DOD_XML Mode

Advanced Design and Setup Guide

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Table of Contents

About the DOD_XML import mode **4**
Import documents removed with a retention policy **4**
Configure Import Agent 4
Import documents from a third-party system **5**
Configure Import Agent 5
DoD 5015.02-STD XML example **7**
Appendix: Import Agent property mapping options **8**

About the DOD_XML import mode

You can use Import Agent to parse XML files that conform to the DoD 5015.02-STD schema. Import Agent uploads the information as document pages in Perceptive Content. This technical paper discusses how to upload documents and associate the DoD 5015.02-STD XML schema for the following two scenarios.

- You can upload documents that you removed from your system through an action in a retention policy. In this scenario, the metadata for the documents already exists in the system. This method associates the document pages to the document properties that are already stored in Perceptive Content.
- You can upload XML files that conform to the DoD 5015.02-STD XML schema for documents that you acquire from a third-party system. In this scenario, you can enter information in the configuration settings file to populate document properties.

Note We recommend using capture profiles if you are not attempting to upload documents in conjunction with the DoD 5015.02-STD file structure.

Import documents removed with a retention policy

You can use Import Agent to upload the pages for documents that you removed from Perceptive Content in a retention policy (with an accession or offline transfer action). In this scenario, Perceptive Content retains any document properties associated with the documents originally uploaded in Perceptive Content, but the pages of the document no longer exist in the system.

This procedure uses the unique document ID to associate the pages of the document with the metadata that is already stored in Perceptive Content.

Configure Import Agent

Complete the following steps to configure Import Agent to reimport documents that were removed from Perceptive Content using a retention policy.

Note This document describes only the settings specific to importing in the DOD_XML mode. You must also configure the standard settings for Import Agent. For more information on the Import Agent configuration file, inserverImp.ini, refer to the *Perceptive Content Server and Client Installation and Setup Guide* for your operating system and database.

1. In the **inserverImp.ini** file, configure the settings as you would normally configure Import Agent.

   Note Because the system retains the document properties for documents you remove using a retention policy, when configuring the settings, you can ignore the document property settings in the inserverimp.ini file.

2. In the **inserverimp.ini** file, ensure the following settings are configured as detailed in the Selection column.

Group	Setting	Selection	Description
General	import.mode	DOD_XML	Specifies the types of files that Import Agent imports and the method that Import Agent uses to gather document property values and assign them to the new documents. When you set import.mode to DOD_XML, Import Agent imports XML files that follow DoD 5015.02-STD. The default is INDEX_FILE.
	import.directory.<n>	Any valid directory	Specifies the directory that Import Agent monitors for import files. You can define an unlimited number of directories by creating new, subsequently named import.directory.<*n*> settings. The default is $(IMAGENOWDIR)/import.
Mode DOD_XML	xml.file.ext	xml	Specifies for Import Agent to import XML files. The default is xml.

3. Ensure the XML files conform to the DoD 5015.02-STD schema. Refer to "DoD 5015.02-*STD* XML Example*"* section in this document for examples of the correct structure.
4. Copy the XML files into the directory you configured Import Agent to monitor in the import.directory.<n> setting.

Import documents from a third-party system

When you use this method, the system imports a unique ID in place of the original file name. When you import documents from a third party using the DOD_XML mode, you cannot upload document properties from the XML file. Instead, you must enter the document properties information in the inserverImp.ini file.

Note Using this method, you cannot import additional custom properties associated with the documents.

Configure Import Agent

Complete the following steps to configure Import Agent to upload documents exported from a third-party system.

1. In the **inserverImp.ini** file, configure the settings as you would normally configure Import Agent, and ensure you configure the document properties.

   Note For more information on inserverImp.ini settings, refer to the *Perceptive Content Server and Client Installation and Setup Guide* for your operating system and database.

2. In the **inserverImp.ini** file, ensure the following settings are configured as detailed in the Selection column below.

Group	Setting	Selection	Description
General	import.mode	DOD_XML	Specifies the types of files that Import Agent imports and the method that Import Agent uses to gather document property values and assign them to the new documents. When you set import.mode to DOD_XML, Import Agent imports XML files that follow DoD 5015.02-STD. The default is INDEX_FILE.
	import.directory.<n>	Any valid directory	Specifies the directory that Import Agent monitors for import files. You can define an unlimited number of directories by creating new, subsequently named import.directory.<*n*> settings. The default is $(IMAGENOWDIR)/import.
Mode DOD_XML	xml.file.ext	xml	Specifies Import Agent to import XML files. The default is xml.
KEY MAPPING	doc.type	<*Any valid document type*> DEFAULT <<date/time>> <<index provided>> <<SerialNumber>> <<undefined>> <<uniqueID>>	Specifies the document type value Import Agent assigns to the Type field. For a description of the mapping options, refer to the appendix. The default is DEFAULT.
	drawer	<*Any valid drawer*> <<date/time>> DEFAULT <<index provided>> <<SerialNumber>> <<undefined>> <<uniqueID>>	Specifies the value Import Agent assigns to the Drawer field. For a description of the mapping options, refer to the appendix. The default is DEFAULT.
	field1	<<date/time>> DEFAULT <<index provided>>	Specifies the values that Import Agent uses for the fields 1, 2, 3, 4, and 5 document properties.
	field2		
	field3		

Group	Setting	Selection	Description
	field4	<*Literal text*> <<SerialNumber>> <<undefined>> <<uniqueID>>	For a description of the mapping options, refer to the appendix. The default is DEFAULT.
	field5		

3. Ensure the XML files conform to the DoD 5015.02-STD schema. Refer to the “DoD 5015.02-STD XML example*”* section in this document for examples of XML files.
4. Copy the XML files into the directory you configured Import Agent to monitor in the import.directory.<n> setting.

DoD 5015.02-STD XML example

Use the XML file example below to ensure that your files conform to the DoD 5015.02-STD XML structure or to convert files that do not follow the correct structure.

Notes

- You must use a Computer File Binary that is a Base64 encoded scheme version of the file.
- Because the system retains the document properties for documents you remove using a retention policy, the system ignores any document properties that may appear in the XML file.

```
<?xml version="1.1" encoding="UTF-8"?>
<rec:Record
xsi:schemaLocation="urn:http://jitc.fhu.disa.mil/recmgt/transferschemas/Record
Record.xsd" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xmlns:add="urn:http://jitc.fhu.disa.mil/recmgt/transferschemas/AdditionalInformation"
xmlns:nscf="urn:http://jitc.fhu.disa.mil/recmgt/transferschemas/ComputerFile"
xmlns:rec="urn:http://jitc.fhu.disa.mil/recmgt/transferschemas/Record"
xmlns:nslc="urn:http://jitc.fhu.disa.mil/recmgt/transferschemas/RecordLifeCycle"
xmlns:sm="urn:http://jitc.fhu.disa.mil/recmgt/transferschemas/SecurityMarking">
  <rec:OriginalContent>
    <nscf:ComputerFile FileName="" CreatingApplication="" FileCreateDate="2012-02-
09T15:42:33Z" UniqueFileId="" FileSize="26112" FileEncoding="BASE64" FileExtension="">
      <nscf:ComputerFileBinary>0M8R4KGxGuEAAAAAAAAAAAAAAAAAAAAA
</nscf:ComputerFileBinary>
    </nscf:ComputerFile>
  </rec:OriginalContent>
</rec:Record>
```

Appendix: Import Agent property mapping options

The following table describes the mapping options available in the [Key Mapping] group in the inserverImp.ini file. These options map values to document properties assigned to imported files.

Option	Description
<Any valid document type>	Assign the name of an existing document type in your Perceptive Content system. Example: Invoice
<Any valid drawer>	Assign the name of an existing drawer in your Perceptive Content system. Example: Accounts Payable
<<index provided>>	Assign a value specified in the applicable mode group, such as [Mode KEYMAPPING] or [Mode FILENAME].
DEFAULT	Assign the value DEFAULT. Example: If you set drawer=DEFAULT, Perceptive Content stores the new document in the drawer named DEFAULT.
<<date/time>>	Assign the date and time that Import Agent imports the file.
<Literal text>	Assign a literal string of text up to 39 characters.
<<SerialNumber>>	Assign the serial number that Import Agent generates as defined in the [Serial Number] group.
<<undefined>>	Do not assign a value.
<<uniqueID>>	Assign the unique ID that Perceptive Content generates for each document.