

IBM StoredIQ Administrator  
Version 7.6.0.2

*Administration Guide*





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**Note**

Before using this information and the product it supports, read the information in "Notices" on page 49.

This edition applies to Version 7.6.0.2 of product number 5724M86 and to all subsequent releases and modifications until otherwise indicated in new editions.

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## About this publication

The IBM® *StoredIQ Administrator Administration Guide* describes how to manage the IBM StoredIQ Administrator application to configure shares, create system infosets, manage users, target sets, and actions, and create reports.

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## IBM StoredIQ Platform product library

The following documents are available in the IBM StoredIQ Platform product library.

- *IBM StoredIQ Platform Deployment and Configuration Guide*, SC27-6386
- *IBM StoredIQ Platform Overview Guide*, GC27-6398
- *IBM StoredIQ Platform Data Server Administration Guide*, SC27-5692
- *IBM StoredIQ Administrator Administration Guide*, SC27-5688
- *IBM StoredIQ Data Workbench User Guide*, SC27-5691
- *IBM StoredIQ Data Workbench Reference Guide*, SC27-6397
- *IBM StoredIQ eDiscovery User Guide*, SC27-5693
- *IBM StoredIQ Policy Manager User Guide*, SC27-5694
- *IBM StoredIQ Data Script User Guide*, SC27-5690

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## Contacting IBM StoredIQ customer support

For IBM StoredIQ technical support or to learn about available service options, contact IBM StoredIQ customer support at this phone number:

### Support and assistance

- 1-866-227-2068

To e-mail IBM StoredIQ customer support, use this email address:

- [storediqsupport@us.ibm.com](mailto:storediqsupport@us.ibm.com)

For information about how to contact IBM, see the Contact IBM web site at <http://www.ibm.com/contact/us/>

### IBM Knowledge Center

The IBM StoredIQ publications can be found from IBM Knowledge Center.

### PDF publications

The IBM Publication Center site offers customized search functions to help you find all the IBM publications you need.

## Contacting IBM

For general inquiries, call 800-IBM-4YOU (800-426-4968). To contact IBM customer service in the United States or Canada, call 1-800-IBM-SERV (1-800-426-7378).

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

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## How to send your comments

Your feedback is important in helping to provide the most accurate and highest quality information.

Send your comments by using the online reader comment form at [https://www14.software.ibm.com/webapp/iwm/web/signup.do?lang=en\\_US&source=swg-rcf](https://www14.software.ibm.com/webapp/iwm/web/signup.do?lang=en_US&source=swg-rcf).

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## Chapter 1. Overview of IBM StoredIQ Administrator

IBM StoredIQ Administrator provides at-a-glance understanding of the different issues that can crop up in the IBM StoredIQ Platform environment. These views are unique to the IBM StoredIQ Administrator application, providing an overview of how the system is running. These views also allow access to various pieces of information that are shared across applications or allow for the management of resources in a centralized manner.

The Administrator is the person responsible for managing the IBM StoredIQ Platform installation at a customer site. This individual has strong understanding of data sources, harvests, indexes, data servers, jobs, infosets, reports, concepts, and actions. This list provides an overview as to how IBM StoredIQ Administrator works.

### Managing Data Servers

Using IBM StoredIQ Administrator, the Administrator can identify what data servers are deployed, their location, what data is being managed, and the status of each data server in the system. Volume management is a central component of IBM StoredIQ Platform. With IBM StoredIQ Administrator, the Administrator can see:

- What volumes are currently under management
- Which data server is responsible for that volume
- The state of the volume after indexing
- The amount and size of information that is contained by each volume.

Administrators can also add volumes to data servers through this interface.

### Administering Harvests

Administrators can initiate the incremental or full harvest of a single volume through the IBM StoredIQ Administrator user interface without having to log into IBM StoredIQ Platform Data Server.

### Creating System Infosets

System infosets that use only specific indexed volumes can be created and managed within IBM StoredIQ Administrator. Although infosets are a core component of IBM StoredIQ Data Workbench, system infosets are created as a shortcut for users in IBM StoredIQ Administrator.

### Managing Users

The user management area allows administrators to create users and manage users' access to the various IBM StoredIQ Platform applications.

### Configuring and Managing Actions

An action is any process upon the data that is represented by the indexes. Actions are run by data servers on indexed data objects. Any errors or warnings that are generated as a result of an action are recorded as exceptions in IBM StoredIQ Data Workbench.

**Note:** Actions can be created within IBM StoredIQ Administrator and then made available to other IBM StoredIQ Platform applications such as IBM StoredIQ Data Workbench.

**Managing target sets**

Provides an interface that allows the user to set the wanted targets for specific actions that require a destination volume for their actions.

**Creating reports**

Helps you to create reports and upload report packages, helping you to produce reports about your environment.

**Using Auto-classification Models**

Deploys natural language processing-based document classification to help you identify relevant documents in cases when relevance is difficult to characterize with traditional methods, such as queries and set operations.

**Managing Concepts**

Helps you to relate business concepts to indexed data.

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## Chapter 2. Data Servers and Volumes

The Data Servers and Volumes page of IBM StoredIQ Administrator contains the Data Dashboard, where you see all data currently under management, **All Data Servers** tab, **All Volumes** tab, and **Performance** tab.

### Data Dashboard

The description of the Data Dashboard fields is listed in the following table.

*Table 1. Data Dashboard fields and descriptions*

Data Dashboard	Description
Total Data Objects	This field lists the total number of data objects under management.
Total Data Size	This field lists the total size of data objects under management.
Number of Data Servers	This field lists the total number of data servers under management.
Number of Volumes	This field lists the total number of volumes under management.

### All Data Servers

All Data Servers tab lists the detailed information about the data servers

*Table 2. All Data Servers tab column names and descriptions*

All Data Servers Column Name	Description
Data server name	Lists the name of the data server.
Status	Lists the data server's status, namely <b>Healthy</b> , <b>Vulnerable</b> , <b>Critical</b> , or <b>Unavailable</b> .
IP address	Lists the IP address of the data server.
Data objects	Lists the number of data objects that are found on the data server.
Total data object size	Lists the size of the data objects that are found on the data server.
Available space	Lists the amount of free space on the data server.
Load average	Lists the load average.

### All Volumes

The tab provides the detailed information about the volumes.

*Table 3. All Volumes tab column names and descriptions*

Volumes Column Name	Description
Volume name	Lists the name of the volume.
Data server	Lists the name of the parent data server.

Table 3. All Volumes tab column names and descriptions (continued)

Volumes Column Name	Description
Type	Lists the volume's type, namely <b>Primary</b> , <b>Retention</b> , or <b>Discovery Export</b> . <b>Primary</b> indicates a primary volume. <b>Retention</b> indicates a retention volume. <b>Discovery Export</b> indicates a discovery export volume.
Source type	Lists the source or connection type for the volume.
Server name	Lists the name of the server where the volume is found.
Data objects	Lists the number of data objects that are found on the volume.
Total data object size	Lists the size of the data objects in the volume.
Last harvested	Denotes the last time that the volume was harvested.

## Performance

This tab provides the performance information of the data servers.

Table 4. Performance tab column names and descriptions

Performance Column Name	Description
Data server name	Lists the name of the data server.
Status	Lists the data server's status, namely <b>Healthy</b> , <b>Vulnerable</b> , <b>Critical</b> , or <b>Unavailable</b> .
IP address	Lists the IP address of the data server.
Active db connection	Lists the number of database connections currently open for the selected data server.
Free memory	Denotes the amount of available memory (RAM) for the selected data server.
Free swap memory	Denotes the amount of available swap memory for the selected data server.
Load average	Lists the average process load for the selected data server.
Last communication	Lists the last time the data server that is connected to the gateway.
Uptime	Lists the total duration of time for which the data server ran.

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## Searching for a specific data server

When you have multiple data servers available from which to choose, you can search for a specific data server instead of using the slider to move through available options.

### Procedure

1. In the **Enter key term(s)...** text box, enter the name of the data server for which you want to search, and then click **Search**. You can enter either the full data server name or a portion of it. To remove the search term, click the **X** to the left of the **Enter key terms....** text box. Actions that match the entered search term are returned.
2. Select a data server from the returned list of servers.
3. View the data server's details by clicking **View Details**.

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## Adding a primary volume

A primary volume serves as a primary data source in IBM StoredIQ Platform. You must have at least one primary volume within your configuration.

### Procedure

1. Select **Data Servers & Volumes > All Data Servers**, select a data server, and then click **Add Volume**. The Add Volume dialog box appears.
2. In the Add Volume dialog box, complete these fields:

*Table 5. CIFS volumes: Add Volume dialog box options for primary volumes*

CIFS: Add Volume dialog box options	Action	Notes
<b>Volume type</b>	In the <b>Volume type</b> list, select <b>Primary</b> .	
<b>Source type</b>	Select the server's source type.	
<b>Server</b>	In the <b>Server</b> text box, enter the fully qualified domain name of the server from which the volume is available for mounting.	
<b>Username</b>	In the <b>Username</b> text box, enter the user name that is used to connect to and mount the volume.	
<b>Password</b>	In the <b>Password</b> text box, enter the password that is used to connect to and mount the volume.	
<b>Assign to Data Server</b>	In the <b>Assign to Data Server</b> list, select the data server.	
<b>Volume Name</b>	In the <b>Volume Name</b> text box, enter the common name of this volume.	
<b>Share</b>	In the <b>Share</b> text box, enter the share name or this volume.	
<b>Initial Directory</b>	In the <b>Initial Directory</b> text box, enter the name of the initial directory from which the harvest must begin.	
<b>Indexing Options</b>	Select the check box for the indexing options that you want to include: <ul style="list-style-type: none"><li>• <b>Include metadata for contained objects</b></li><li>• <b>Include content tagging and full-text index</b></li></ul>	These options are not selected by default.

Table 6. Exchange volumes: Add Volume dialog box options for primary volumes

Exchange: Add Volume dialog box options	Action	Notes
<b>Volume type</b>	In the <b>Volume type</b> list, select <b>Primary</b> .	
<b>Source type</b>	Select the server's source type.	
<b>Server</b>	In the <b>Server</b> text box, enter the fully qualified domain name of the server from which the volume is available for mounting.	
<b>Username</b>	In the <b>Username</b> text box, enter the user name that is used to connect to and mount the volume.	
<b>Password</b>	In the <b>Password</b> text box, enter the password that is used to connect to and mount the volume.	
<b>Assign to Data Server</b>	In the <b>Assign to Data Server</b> list, select the data server.	
<b>Volume Name</b>	In the <b>Volume Name</b> text box, enter the common name of this volume.	
<b>Server Version</b>	In the <b>Server Version</b> list, select the version of Microsoft Exchange, choosing from <b>2000/2003</b> , <b>2007</b> , <b>2010/2013</b> .	
<b>Mailbox Server</b>	In the <b>Mailbox Server</b> text box, enter the name of the mailbox server.	
<b>Active Directory Server</b>	In the <b>Active Directory Server</b> text box, enter the name of the Active Directory server. To use secure socket layer, select the <b>Use SSL</b> check box.	
<b>Initial Directory</b>	In the <b>Initial Directory</b> text box, enter the name of the initial directory from which the harvest must begin.	
<b>Virtual Root</b>	In the <b>Virtual Root</b> text box, the name defaults to match the Exchange server designation.	
<b>Indexing Options</b>	Select the check box for the indexing options that you want to include: <ul style="list-style-type: none"> <li>• <b>Include metadata for contained objects</b></li> <li>• <b>Include content tagging and full-text index</b></li> </ul>	These options are not selected by default.



Table 7. FileNet volumes: Add Volume dialog box options for primary volumes

FileNet: Add Volume dialog box options	Action	Notes
Volume type	In the <b>Volume type</b> list, select <b>Primary</b> .	
Source type	Select the server's source type.	
Server	In the <b>Server</b> text box, enter the fully qualified domain name of the server from which the volume is available for mounting.	
Port	In the <b>Port</b> text box, enter the port number.	
Username	In the <b>Username</b> text box, enter the user name that is used to connect to and mount the volume.	
Password	In the <b>Password</b> text box, enter the password that is used to connect to and mount the volume.	
Assign to Data Server	In the <b>Assign to Data Server</b> list, select the data server.	
Volume Name	In the <b>Volume Name</b> text box, enter the common name of this volume.	
Object Store	In the <b>Object Store</b> text box, enter the object store.	
Connection Type	In the <b>Connection Type</b> list, select either <b>HTTP</b> or <b>HTTPS</b> .	
Path	In the <b>Path</b> text box, enter the appropriate directory path.	
Stanza	In the <b>Stanza</b> text box, enter the appropriate stanza.	
Scope	In the <b>Scope</b> text box, enter the appropriate SQL where clause.	
Indexing Options	Select the check box for the indexing options that you want to include: <ul style="list-style-type: none"> <li>• <b>Include metadata for contained objects</b></li> <li>• <b>Include content tagging and full-text index</b></li> </ul>	These options are not selected by default.

Table 8. IBM Content Manager volumes: Add Volume dialog box options for primary volumes

IBM Content Manager: Add Volume dialog box options	Action	Notes
<b>Volume type</b>	In the <b>Volume type</b> list, select <b>Primary</b> .	
<b>Source type</b>	Select the server's source type.	
<b>Server</b>	In the <b>Server</b> text box, enter the fully qualified domain name of the server from which the volume is available for mounting.	
<b>Port</b>	In the <b>Port</b> text box, enter the port number. By default, this value is 50000.	
<b>Username</b>	In the <b>Username</b> text box, enter the user name that is used to connect to and mount the volume.	
<b>Password</b>	In the <b>Password</b> text box, enter the password that is used to connect to and mount the volume.	
<b>Connection String</b>	In the <b>Connection String</b> text box, enter additional connection-string parameters. This is an optional step.	
<b>Assign to Data Server</b>	In the <b>Assign to Data Server</b> list, select the data server.	
<b>Volume Name</b>	In the <b>Volume Name</b> text box, enter the common name of this volume.	
<b>Repository</b>	In the <b>Repository</b> text box, enter the name of the repository.	
<b>Server Type</b>	In the <b>Server Type</b> list, select the type of server associated with the volume. Options include <b>DB2</b> and <b>Oracle</b> . By default, <b>DB2</b> is selected.	
<b>Schema</b>	In the <b>Schema</b> text box, enter the schema for this volume.	
<b>Remote Database</b>	In the <b>Remote Database</b> text box, enter the name of the remote database.	

Table 8. IBM Content Manager volumes: Add Volume dialog box options for primary volumes (continued)

IBM Content Manager: Add Volume dialog box options	Action	Notes
<b>Indexing Options</b>	<p>Select the check box for the indexing options that you want to include:</p> <ul style="list-style-type: none"> <li>• <b>Include metadata for contained objects</b></li> <li>• <b>Include content tagging and full-text index</b></li> </ul> <p><b>Note:</b> IBM StoredIQ does not harvest IBM Content Manager. As such, indexing options are not applicable.</p>	These options are not selected by default.

Table 9. Livelink volumes: Add Volume dialog box options for primary volumes

Livelink: Add Volume dialog box options	Action	Notes
<b>Volume type</b>	In the <b>Volume type</b> list, select <b>Primary</b> .	
<b>Source type</b>	Select the server's source type.	
<b>Server</b>	In the <b>Server</b> text box, enter the fully qualified domain name of the server from which the volume is available for mounting.	
<b>Port</b>	In the <b>Port</b> text box, enter the port number.	
<b>Username</b>	In the <b>Username</b> text box, enter the user name that is used to connect to and mount the volume.	
<b>Password</b>	In the <b>Password</b> text box, enter the password that is used to connect to and mount the volume.	
<b>Assign to Data Server</b>	In the <b>Assign to Data Server</b> list, select the data server.	
<b>Volume Name</b>	In the <b>Volume Name</b> text box, enter the common name of this volume.	
<b>Database</b>	In the <b>Database</b> text box, enter the database name.	
<b>Search slice</b>	In the <b>Search slice</b> text box, enter the search slice.	
<b>Initial Directory</b>	In the <b>Initial Directory</b> text box, enter the name of the initial directory from which the harvest must begin.	

Table 9. Livelink volumes: Add Volume dialog box options for primary volumes (continued)

Livelink: Add Volume dialog box options	Action	Notes
<b>Indexing Options</b>	Select the check box for the indexing options that you want to include: <ul style="list-style-type: none"> <li>• <b>Include metadata for contained objects</b></li> <li>• <b>Include content tagging and full-text index</b></li> </ul>	These options are not selected by default.

Table 10. NewsGator volumes: Add Volume dialog box options for primary volumes

NewsGator: Add Volume dialog box options	Action	Notes
<b>Volume type</b>	In the <b>Volume type</b> list, select <b>Primary</b> .	
<b>Source type</b>	Select the server's source type.	
<b>Server</b>	In the <b>Server</b> text box, enter the fully qualified domain name of the server from which the volume is available for mounting.	
<b>Username</b>	In the <b>Username</b> text box, enter the user name that is used to connect to and mount the volume.	
<b>Password</b>	In the <b>Password</b> text box, enter the password that is used to connect to and mount the volume.	
<b>Assign to Data Server</b>	In the <b>Assign to Data Server</b> list, select the data server.	
<b>Volume Name</b>	In the <b>Volume Name</b> text box, enter the common name of this volume.	
<b>Initial Directory</b>	In the <b>Initial Directory</b> text box, enter the name of the initial directory from which the harvest must begin.	
<b>Indexing Options</b>	Select the check box for the indexing options that you want to include: <ul style="list-style-type: none"> <li>• <b>Include metadata for contained objects</b></li> <li>• <b>Include content tagging and full-text index</b></li> </ul>	These options are not selected by default.

Table 11. NFS volumes: Add Volume dialog box options for primary volumes

NFS: Add Volume dialog box options	Action	Notes
Volume type	In the <b>Volume type</b> list, select <b>Primary</b> .	
Source type	Select the server's source type.	
Server	In the <b>Server</b> text box, enter the fully qualified domain name of the server from which the volume is available for mounting.	
Assign to Data Server	In the <b>Assign to Data Server</b> list, select the data server.	
Volume Name	In the <b>Volume Name</b> text box, enter the common name of this volume.	
Export	In the <b>Export</b> text box, enter the export name for this volume.	
Initial Directory	In the <b>Initial Directory</b> text box, enter the name of the initial directory from which the harvest must begin.	
Indexing Options	Select the check box for the indexing options that you want to include: <ul style="list-style-type: none"> <li>• <b>Include metadata for contained objects</b></li> <li>• <b>Include content tagging and full-text index</b></li> </ul>	These options are not selected by default.

Table 12. SharePoint volumes: Add Volume dialog box options for primary volumes

SharePoint: Add Volume dialog box options	Action	Notes
Volume type	In the <b>Volume type</b> list, select <b>Primary</b> .	
Source type	Select the server's source type.	
Server	In the <b>Server</b> text box, enter the fully qualified domain name of the server from which the volume is available for mounting.	
Username	In the <b>Username</b> text box, enter the user name that is used to connect to and mount the volume.	
Password	In the <b>Password</b> text box, enter the password that is used to connect to and mount the volume.	

Table 12. SharePoint volumes: Add Volume dialog box options for primary volumes (continued)

SharePoint: Add Volume dialog box options	Action	Notes
Assign to Data Server	In the <b>Assign to Data Server</b> list, select the data server.	
Volume Name	In the <b>Volume Name</b> text box, enter the common name of this volume.	
Site URL	In the <b>Site URL</b> text box, enter the site URL of the SharePoint server.	
Initial Directory	In the <b>Initial Directory</b> text box, enter the name of the initial directory from which the harvest must begin.	
Indexing Options	Select the check box for the indexing options that you want to include: <ul style="list-style-type: none"> <li>• <b>Include metadata for contained objects</b></li> <li>• <b>Include content tagging and full-text index</b></li> </ul>	These options are not selected by default.

Table 13. IBM Watson Curator volumes: Add Volume dialog box options for primary volumes

IBM Watson Curator: Add Volume dialog box options	Action	Notes
Volume type	In the <b>Volume type</b> list, select <b>Primary</b> .	
Source type	Select the server's source type.	
Server	In the <b>Server</b> text box, enter the fully qualified domain name of the server from which the volume is available for mounting.	
Port	In the <b>Port</b> text box, enter the port number.	
Username	In the <b>Username</b> text box, enter the user name that is used to connect to and mount the volume.	
Password	In the <b>Password</b> text box, enter the password that is used to connect to and mount the volume.	
Assign to Data Server	In the <b>Assign to Data Server</b> list, select the data server.	
Volume Name	In the <b>Volume Name</b> text box, enter the common name of this volume.	

Table 13. IBM Watson Curator volumes: Add Volume dialog box options for primary volumes (continued)

IBM Watson Curator: Add Volume dialog box options	Action	Notes
Use SSL	Select the <b>Use SSL</b> check box.	
Service	In the <b>Service</b> text box, enter the service name.	
Repository	In the <b>Repository</b> text box, enter the name of the repository.	
Indexing Options	Select the check box for the indexing options that you want to include: <ul style="list-style-type: none"> <li>• <b>Include metadata for contained objects</b></li> <li>• <b>Include content tagging and full-text index</b></li> </ul> <p><b>Note:</b> IBM StoredIQ does not harvest IBM Watson Curator. As such, indexing options are not applicable.</p>	These options are not selected by default.

3. Click **Save** to save your configurations and add the volume.
4. Click the **All Volumes** tab. Notice that the added volume appears therein, listed as a primary volume. To harvest this newly added volume, select that volume and then click **Harvest**.

## Adding a retention volume

A retention volume stores data objects that are placed under retention, meaning that the object is retained for a specified period.

### Procedure

1. Click **Data Servers & Volumes > All Data Servers**, and then click **Add Volume**. The Add Volume dialog box appears.
2. In the Add Volume dialog box, complete these fields:

Table 14. Retention volume options

Add Volume dialog box option	Action	Notes	Source type
Volume Type	In the <b>Volume Type</b> list, select <b>Retention</b> .		<ul style="list-style-type: none"> <li>• CIFS</li> <li>• NFS</li> </ul>
Source Type	In the <b>Source Type</b> list, select the source or connection type.		<ul style="list-style-type: none"> <li>• CIFS</li> <li>• NFS</li> </ul>
Server	In the <b>Server</b> text box, enter the fully qualified domain name of the server from which the volume is available for mounting.		<ul style="list-style-type: none"> <li>• CIFS</li> <li>• NFS</li> </ul>

Table 14. Retention volume options (continued)

Add Volume dialog box option	Action	Notes	Source type
Username	In the <b>Username</b> text box, enter the user name that is used to connect to and mount the volume.		<ul style="list-style-type: none"> <li>• CIFS</li> </ul>
Password	In the <b>Password</b> text box, enter the password that is used to connect to and mount the volume.		<ul style="list-style-type: none"> <li>• CIFS</li> </ul>
Assign to Data Server	In the <b>Assign to Data Server</b> list, select a data server.		<ul style="list-style-type: none"> <li>• CIFS</li> <li>• NFS</li> </ul>
Volume Name	In the <b>Volume Name</b> text box, enter the common name of this volume.		<ul style="list-style-type: none"> <li>• CIFS</li> <li>• NFS</li> </ul>
Share	In the <b>Share</b> text box, enter the share name for this volume.		<ul style="list-style-type: none"> <li>• CIFS</li> </ul>
Export	In the <b>Export</b> text box, enter the export name for this volume.		<ul style="list-style-type: none"> <li>• NFS</li> </ul>
Indexing Options	Select the check box for the indexing options that you want to include: <ul style="list-style-type: none"> <li>• <b>Include metadata for contained objects</b></li> <li>• <b>Include content tagging and full-text index</b></li> </ul>	These options are not selected by default.	<ul style="list-style-type: none"> <li>• CIFS</li> <li>• NFS</li> </ul>

3. Click **Save** to save your configurations and add the volume. Retention volumes do not have any data to harvest until a copy to retention runs.
4. Click the **All Volumes** tab. The added volume appears, listed as a retention volume.

## Adding a discovery export volume

A discovery export volume contains data that is produced from a discovery export action. That data is kept so that it can be exported as a load file and uploaded into a legal review tool.

### Procedure

1. Click **Data Servers & Volumes > All Data Servers**, and then click **Add Volume**. The Add Volume dialog box appears.
2. In the Add Volume dialog box, complete these fields:

Table 15. Discovery export volume options

Add Volume dialog box option	Action	Notes	Source type
Volume Type	In the <b>Volume Type</b> list, select <b>Discovery Export</b> .		<ul style="list-style-type: none"> <li>• CIFS</li> <li>• NFS</li> </ul>
Source Type	In the <b>Source Type</b> list, select the source or connection type.		<ul style="list-style-type: none"> <li>• CIFS</li> <li>• NFS</li> </ul>



Table 15. Discovery export volume options (continued)

Add Volume dialog box option	Action	Notes	Source type
Server	In the <b>Server</b> text box, enter the fully qualified domain name of the server from which the volume is available for mounting.		<ul style="list-style-type: none"> <li>• CIFS</li> <li>• NFS</li> </ul>
Username	In the <b>Username</b> text box, enter the user name that is used to connect to and mount the volume.		<ul style="list-style-type: none"> <li>• CIFS</li> </ul>
Password	In the <b>Password</b> text box, enter the password that is used to connect to and mount the volume.		<ul style="list-style-type: none"> <li>• CIFS</li> </ul>
Assign to Data Server	In the <b>Assign to Data Server</b> list, select the data server.		<ul style="list-style-type: none"> <li>• CIFS</li> <li>• NFS</li> </ul>
Volume Name	In the <b>Volume Name</b> text box, enter the name of this volume.		<ul style="list-style-type: none"> <li>• CIFS</li> <li>• NFS</li> </ul>
Share	In the <b>Share</b> text box, enter the share name for this volume.		<ul style="list-style-type: none"> <li>• CIFS</li> </ul>
Export	In the <b>Export</b> text box, enter the export name for this volume.		<ul style="list-style-type: none"> <li>• NFS</li> </ul>

3. Click **Save** to save your configurations and add the volume.
4. Click the **All Volumes** tab. The added volume appears, listed as a discovery export volume.

---

## Viewing details of a data server

Detailed information for any data server or volume can be viewed.

### Procedure

1. Click **Data Servers & Volumes > All Data Servers**, and then click **View Details**. The <data server name> Details page appears, showing the **All Data Servers** and **All Volumes** tabs.
2. Select the **All Data Servers** tab, select the item for which you want to view its details, and then click **View Details**.

**Note:** To view details for multiple items, press **Ctrl** and select those items, and then click **View Details**.

A summary of the data server's details appears along with the **Volumes** and **Performance** tabs.

---

## Viewing performance of a data server

The ability to check the status of all deployed data servers is critical to understanding the system's performance metrics.

### Procedure

1. Click **Data Servers & Volumes > All Data Servers**, and then click **View Details**. The <data server name> Details page appears, showing the **Volumes** and **Performance**.

2. Select the **Performance** tab, and the data server's performance details appears.

---

## Chapter 3. Harvests

The Harvests page of IBM StoredIQ Administrator displays the complete list of harvests, where you see all harvests currently under management

In the **Scheduled Harvests** list, select from **Scheduled Harvests**, **Current Harvests**, and **Completed Harvests**. Depending on the option selected, only those harvests in that category are shown in the List of Harvests table.

The description of the different harvest fields is listed in the following table.

*Table 16. List of Harvests fields and descriptions*

List of Harvests	Description
<b>Name</b>	Lists the name of the harvest instance.
<b>Type</b>	Lists the type of harvest, either <b>Full</b> or <b>Incremental</b> .
<b>Start time</b>	Lists the date and time at which the harvest was initiated.
<b>Owner</b>	Lists the owner of the harvest.

---

### Harvesting a volume

By clicking **Harvest**, an Administrator can initiate a full or incremental harvest of a primary volume without having to utilize IBM StoredIQ Platform Data Server.

#### Procedure

1. Click **Data Servers & Volumes > All Data Servers > Volume**, select the volume to harvest, and then click **Harvest**. The Harvest Volume dialog box appears.
2. In the **Harvest Name** text box, enter a unique name for this harvest.
3. In the **Schedule Harvest** area, select either of the following options.
  - Select **Immediate** to harvest the volume immediately.
  - Click **Schedule** to schedule a date and time for the harvest to occur. Enter the date (YYYY-MM-DD) and time in the text boxes.
4. In the **Harvest Options** area, select **Incremental** or **Full**.
  - An **Incremental** harvest only harvests any changes on the selected volume since its last harvest.
  - A **Full** harvest performs a full harvest of the selected volume, regardless of when it was last harvested.
5. Click **Save**, and the volume is harvested.

---

### Searching for a specific harvest

When you have multiple harvests available to choose, you can search for a specific harvest instead of using the slider to move through available options.

#### Procedure

1. In the **Scheduled Harvests** lists, select either **Scheduled Harvests**, **Current Harvests**, or **Completed Harvests**. Depending on the option that is selected, only harvests in the selected category are shown in the table.

2. In the **Enter key term(s)...** text box, enter the name of the harvest for which you want to search, and then click **Search**. You can enter either the full harvest name or a portion of it. To remove the search term, click the **X** to the left of the **Enter key term(s)....** text box. Harvests that match the entered search term are returned.
3. Select a harvest from the returned list of harvests.

---

## Stopping a harvest

Harvests that have not yet completed can be stopped.

### Procedure

1. In the **Scheduled Harvests** list, select **Current Harvests**. The list of harvests that are currently running opens.
2. Select the harvest that you want to stop and click **Stop Harvest**. The **Confirm Stopping Harvest** window appears.
3. Click **Stop Harvest** to confirm that the harvest will be stopped and not completed.

---

## Editing a harvest

Existing harvests can be modified as needed.

### Procedure

1. In the List of Harvests page, select the harvest that you want to edit, and then click **Edit Harvest**. The Edit Harvest dialog box appears.

**Note:** Only scheduled harvests can be edited.

2. In the Edit Harvest dialog box, edit the harvest as needed.
3. Click **Save** to save your changes.

---

## Deleting a harvest

Scheduled harvests can be deleted from the List of Harvests page.

### Procedure

1. In the List of Harvests page, select the scheduled harvest that you want to delete, and then click **Delete Harvest**. The Delete Harvest window appears.
2. Click **Delete** to delete the selected harvest. The harvest is deleted from the list of scheduled harvests.

---

## Chapter 4. System infosets

System infosets can be created in IBM StoredIQ Data Workbench to allow users to have a different starting point than the All Data Objects infoset.

System infosets are the basis for user-created infosets. System infosets allow administrators to select which indexed volumes the infoset can draw upon, creating a shortcut for IBM StoredIQ Data Workbench users. Actions cannot be run on system infosets, but only on user-created infosets. Therefore, you must first create the system infoset here in IBM StoredIQ Administrator and then create a user infoset that can be acted upon in IBM StoredIQ Data Workbench.

Infosets can be public or private. The administrator determines users' access to system infosets at the time of creation. The All Data Objects and All System-Level Objects infosets, which are generated by the application, are set to admin by default and can be viewed only by an administrator.

**Note:** System infosets must not be used to manage volumes or indexes. Additionally, system infosets must be created judiciously. If there are several system infosets through which a user must cull, the shortcut aspect is removed.

*Table 17. Infoset management column names and descriptions*

Infoset Management Column Name	Description
Name	Lists the name of the system infoset. This name must be unique against all infosets.
Total objects	Lists the total number of data objects that are contained within the system infoset.
Infoset size	Lists size of the system infoset.
In use by	Indicates the infosets in which this system infoset is used. If the system infoset is in use, a link is shown, indicating the number of infosets by which the system infoset is being used. Click the link to see which infosets use this system infoset.
Access	Indicates whether the system infoset is public or private. If the system infoset is public, it can be viewed by any user. If the system infoset is private, it can be viewed by only those users granted permission by the administrator. If users are granted permission, the number of users is listed with a hyperlink to the Access Members modal, which lists the name and role of users who have access.
Description	This column lists the optional description of the system infoset.

---

### Searching for a specific system infoset

When you have multiple system infosets available to choose, you can search for a specific system infoset instead of using the slider to move through available options.

#### Procedure

1. In the **Enter key term(s)...** text box, enter the name of the system infoset for which you want to search, and then click **Search**. You can enter either the full

system info set name or a portion of it. To remove the search term, click the **X** to the left of the **Enter key term(s)...** text box. System info sets that match the entered search term are returned.

2. Select a system info set from the returned list of system info sets.

---

## Creating a system info set

System info sets can be created with selected volumes, creating a shortcut for IBM StoredIQ Data Workbench users.

### Procedure

1. Click **System Info Sets**, and then click **Create Info Set**. The Add System Info Set dialog box appears.
2. In the Add System Info Set dialog box, complete these fields.
  - a. In the **Info Set Name** text box, enter the name of this system info set.
  - b. In the **Description of Info Set** text box, enter a brief description of this system info set. This info set might need to be used by several people, so an accurate description can be helpful to others.
  - c. In the Access area, click either **Public** or **Private**. The All Data Objects and All System-Level Objects info sets, which are generated by the application, can be viewed only by an administrator. System info sets that are created by an administrator default to public. Public system info sets are visible and available to all users, including users that will be added at a future time. For public system info sets, the user list is disabled.
  - d. For private system info sets, the list of available users becomes active. Select the users for whom this private info set can be seen. If no users are selected for a private system info set, then only administrators can see that system info set because they have administrative rights to every info set.

**Note:** Access cannot be edited. It must be determined at the time of info set creation.

- e. Add volumes to this info set. In the **Available Volumes** area, select the volumes that you want to add to this system info set, and then click **Add**. To remove volumes from the info set, select the volume in **Selected Volumes** and then click **Remove**.
3. Click **Save** to save the system info set. It now appears on the List of Info Sets page.

---

## Editing a system info set

Existing user-created system info sets can be modified as needed.

### Procedure

1. In the List of Info Sets page, select the system info set that you want to edit, and then click **Edit Info Set**. The Edit System Info Set dialog box appears.
2. In the Edit System Info Set dialog box, edit the info set as needed.

**Note:** Access cannot be edited. It must be determined at the time of info set creation.

3. Click **Save** to save your changes.

---

## Viewing infosets that use a system infoset

Click the link to view which infosets use the selected system infoset.

### Procedure

1. Select the system infoset for which you would like what other infosets use the system infoset.
2. In the **In use by** column, click the link. The System infoset modal for the system infoset appears, listing the infosets that use it.
3. Click **Close**.

---

## Viewing access members

### Procedure

1. Select the system infoset for which you would like to access its members, and then click the link in the Access column. The Access Members window appears, listing both the user names and roles of all members of the system infoset.

**Note:** The columns can be sorted to show members in ascending or descending order.

2. Click **Close**.

---

## Deleting a system infoset

System infosets can be deleted from the List of Infosets page if they are not in use by other infosets. When a system infoset is in use by a direct ancestor of other infosets, **Delete** is unavailable for use so that the system infoset cannot be deleted.

### Procedure

1. In the List of Infosets page, select the system infoset that you want to delete, and then click **Delete Infoset**.

**Note:** The All Data Objects and All System-Level Objects system infosets cannot be deleted.  
The Delete Infoset window appears.

2. Click **Delete** to delete the selected system infoset. The system infoset is deleted from the list of available system infosets.





---

## Chapter 5. User management

From the **User Management** page, users can be defined and provided with login information so that they can use the application stack.

This table lists and describes all of the fields that are seen within the List of Users page. When a user is selected, that user can be viewed, edited, or deleted.

*Table 18. List of Users column names and descriptions*

List of Users column name	Description
User name	The user name that is assigned to the user
First name	The user's first or given name
Last name	The user's last or surname
Email address	The user's email address. System notifications are sent to this email address.
Role	The user's role. Options include <b>Admin</b> , <b>Data User</b> , <b>Discovery User</b> , <b>Policy User</b> , or <b>SDK User</b> .
Status	The user's status. Options include <b>Active</b> or <b>Inactive</b> . <ul style="list-style-type: none"><li>• <b>Active</b> users can log in and use the product. <b>Active</b> is the default status for a user.</li><li>• <b>Inactive</b> users cannot log in to the product suite because their account is rendered inactive by the Administrator. When inactive users attempt to log in, they are notified that their login is invalid and that they must contact an Administrator.</li></ul>
Last login	The date and time of the most recent user login. If the user is not logged in to the system, <b>N/A</b> is shown.

---

### Viewing your user profile

When you are viewing your user profile, you can see various aspects, including your assigned roles.

#### Procedure

1. Within the interface, click the down arrow to the right of your user name, and then select **View Profile**. The View Profile window appears, showing various pieces of data, including your name, role, and email address.
2. To change your password, click **Change Password**.
3. Click **Close** to close the View Profile window.

---

### Searching for a specific user

When you have multiple users available to choose, you can search for a specific user instead of using the slider to move through available options.

## Procedure

1. In the **Enter key term(s)...** text box, enter the user name of the user for which you want to search, and then click **Search**. To remove the search term, click the **X** to the right of the **Enter key term(s)...** text box. Users that match the entered search term are returned.
2. Select a user name from the returned list of user names.

---

## Creating a user

Within IBM StoredIQ Platform, a user authenticates to and interacts with the product suite. When a user is created, this user can log in and use the system.

### Procedure

1. Click **Users**, and then click **Create User**. The Add User - Details dialog box appears.
2. In the Add User - Details dialog box, complete these fields.
  - a. In the **User name** text box, enter the user name of the individual. It is generally a short, unique name, not the person's full name.
  - b. In the **First name** text box, enter the first or common name of the user.
  - c. In the **Last name** text box, enter the last or surname of the user.
  - d. In the **Email address** text box, enter the user's email address.

**Note:** Because **User name** and **Email address** are unique fields, users can log in to the system by entering either their email address or their user name.

- e. In the **Password** text box, enter the password for this user.

**Note:** Passwords must be at least 8 characters in length and contain at least one of each of these characters: an uppercase letter, a lowercase letter, a number, and a special character.

- f. In the **Re-enter password** text box, enter the user's password again.
- g. In the **Role** list, select the user's role. Options include **Admin**, **Data User**, **Discovery User**, **Policy User**, or **SDK User**. A user can be assigned multiple roles by selecting the check boxes in the role list.

**Note:** The default option during user creation is **Data User**.

- h. In the **Status** list, select the user's status. Options include **Active** or **Inactive**.

**Note:** The default option during user creation is **Active**.

- i. Click **Save**, and the user is created.

The newly created user appears within the User Management page.

---

## Editing a user

You can modify existing users, including their status as needed. You can also activate the disabled users within IBM StoredIQ Administrator.

### About this task

**Note:** Users become disabled after three failed log-in attempts. It is different than a user rendered inactive, which can be done only by an administrator.

## Procedure

1. Click **Users**, and then select the name of the user that you want to edit.
2. Click **Edit User**. The Edit User - Details dialog box appears.
3. In the Edit User - Detail dialog box, modify the fields as needed.

**Note:** To modify a user's status, select the wanted, changed status in the **Status** list.

**Note:** If you are an administrator and you are changing a user's password, click the **Send reset password email** link.

4. Click **Save**, and the edited user information is saved.

---

## Viewing details of a user

Basic user information such as first and surname, email address, and role can be viewed by clicking **View Details**.

### Procedure

1. Within the User Management page, select the name of the user for which you want to view details.
2. Click **View Details**, and the View User Details window appears.
3. Within the View User Details window, the following information can be seen:

Option	Description
User Name	The user name of the selected user.
First Name	The first or given name of the selected user.
Last Name	The last or surname of the selected user.
Email Address	The email address of the selected user.
Role	The role of the selected user. A role is a named collection of permissible activities within the system. Based on the assigned role of the selected user, that individual can or cannot do certain things within the system.
Status	The status of the selected user. Options include active or inactive.
Last Login	The last date and time at which the selected user logged in to the system.

4. To view the user's access log, click the **View access log** link. The View Access History Log window appears, showing the system entries for the selected user. Within the entries, you see system activities such as successful logins, unsuccessful logins, when a password was changed. To close the View Access History Log window, click **Close**.

**Note:** These columns can be sorted by clicking the up and down arrows to the right of the column name.

5. To close the View User Details window, click **Close**.

---

## Deleting a user

You can delete existing users from the system as needed; however, the log entries of a deleted user are also deleted. In certain instances, it is a good practice that you change a user's status.

### Procedure

1. Click **Users**, and then select the name of the user that you want to delete.
2. Click **Delete User**. The Delete User window appears.

**Note:** If you opt to delete a user, then any log files that are associated with this user are also deleted.

3. To confirm that you want to delete the user, click **Delete**. The confirmation Delete User window appears, confirming that the user was deleted from the system.

---

## Changing user passwords

Either the user or the administrator can change passwords. Valid passwords are at least 8 characters in length and contain at least an uppercase letter, a lowercase letter, a number, and a special character.

### About this task

The password reset interaction can occur in four ways:

- A user clicks the **Forgot password** link on the login page, leading the user to change the password.
- A user clicks the **Did not receive password details** or **Changed your email address** link within the login screen from any of the applications.
- Users view their profile and opt to change the associated password.
- An administrator edits a user's profile and opts to reset the associated password. An email is then sent to the user, forcing individuals to change their password.

### Procedure

1. Within the email you received regarding how to change your password, click the provided link. The Change Your Password dialog box appears.
2. In the **Old password** text box, enter the previously used password for this user.

**Note:** If the password entered in this text box does not match the one listed in the system's database records, a red warning message appears. Reenter the old password.

3. In the **New password** text box, enter a new password for this user.
4. In the **Re-enter new password** text box, type the password again.

**Note:** The passwords that are entered into the **New password** and **Re-enter new password** text boxes must be identical and meet the system's security requirements. If the entered data is not identical, a red warning appears.

5. Click **Save**. A congratulatory message appears, confirming that your password is changed. Click **OK** to close the window.

---

## Resetting the user password

User passwords can be set and reset as needed by users and administrators alike.

## About this task

There are two ways to reset a password:

- For administrators, click the **Send reset password email** link in the Edit User Details window.
- For users who reset their own passwords, use the following procedure.

### Procedure

1. From the application login screen, click the **Forgot your password** link. The Reset Password dialog box appears.
2. In the **Email Address** text box of the Reset Password dialog box, enter the email address where a link to change the password must be sent. This email address must be linked with your account in IBM StoredIQ Administrator.
3. Click **Submit**. A confirmation window appears, stating that an email with instructions for changing your password was sent.
4. Click **OK** to close the Reset Password window.

---

## Obtaining a new password

Users occasionally need to obtain new passwords to be able to log in to the system.

### Procedure

1. From the application's login screen, click the **Did not receive a password** link.
2. Contact your system administrator about obtaining a new password.



---

## Chapter 6. Action management

Actions represent executable processes that act upon indexed data within data servers. Use the Action Management page to create and modify actions that are used by IBM StoredIQ Administrator.

With IBM StoredIQ Administrator, you can create these types of actions:

- **Copy:** The copy action copies infosets to a target set.
  - You can specify the directory structure and security settings for copied data objects.
  - If a data object exists with the same name, then the subsequent data objects that are encountered are renamed.
- **Copy to Retention:** The copy to retention action copies data objects from source volumes to a target set for a specified period.
- **Delete:** The delete action removes data objects from the source volume.
  - Only data objects, not directories, are deleted.
  - Use caution when you are deleting data objects.
- **Discovery Export EDRM XML:** The discovery export action copies data objects and generates an EDRM XML file for loading into third-party legal review tools.
- **Discovery Export DAT:** The discovery export action copies data objects and generates a Concordance DAT file for loading into third-party legal review tools.
- **Discovery Export DAT Light:** The discovery export action copies data objects and generates a Concordance DAT (Light) file for loading into third-party legal review tools.
- **Modify Attribute:** The modify attribute action simulates setting retention by manipulating specific attributes on objects.
- **Move:** The move action moves data objects in an infoset to another volume.
  - You can specify the directory structure and security settings for moved data objects.
  - If a data object exists with the same name, then the data object is renamed.
  - When the source equals the destination, the move is not allowed.
- **Step-up Full-Text:** The step-up full-text action can be run on an infoset, providing content to the full-text index for objects that are infoset members.
- **Step-up Snippet:** The step-up snippet action can be run on an infoset, extracting and storing text for any data object to which it is applied. These data snippets are then used by auto-classification. Infosets objects without snippets are not classified for auto-classification.

**Note:** When scheduled harvests or policies are run against a data source, snippets are not updated or generated if they are missing.

Table 19. Actions column names and descriptions

Actions Column Name	Description
Action Name	Lists the name of the action.

Table 19. Actions column names and descriptions (continued)

Actions Column Name	Description
Type	Lists the action type, namely <b>Copy</b> , <b>Copy to Retention</b> , <b>Delete</b> , <b>Modify Attribute</b> , <b>Move</b> , <b>Discovery Export XML</b> , <b>Discovery Export DAT</b> , <b>Discovery Export DAT Light</b> , <b>Step-up Full-Text</b> , and <b>Step-up Snippet</b> .
Last Modified	Lists the date and time at which the action was last modified.
Target Set Name	Lists the action's destined target set.
Description	Lists the action description.

---

## Searching for a specific action

When you have multiple actions available to choose, you can search for a specific action instead of using the slider to move through available options.

### Procedure

1. In the **Enter key terms...** text box, enter the name of the action for which you want to search, and then press **Search**. You can enter either the full action name or a portion of it. To remove the search term, click the **X** to the left of the **Enter key terms....** text box. Actions that match the entered search term are returned.
2. Edit, clone, or delete the action as needed.

---

## Creating an action

Actions are processes that are enacted on data objects, which are defined by infosets. Actions must be defined here in IBM StoredIQ Administrator.

### About this task

The step-up snippet and step-up full-text actions are built-in actions, meaning that no options are provided within the user interface. You cannot create or edit the step-up snippet or step-up full-text action as they are provided for you as prepopulated options on the **Actions** tab.

### Procedure

1. Click **Actions**, and then click **Create Action**. The Add Action dialog box appears.
2. In the Add Action dialog box, complete these fields.
  - a. In the **Action Name** text box, enter the name of this action.
  - b. In the **Description of Action** text box, enter a brief description of this action. This action might need to be used by several people, so an accurate description can be helpful to others.
  - c. In the **Action Type** list, select the action type.
  - d. If you are creating a copy, copy to retention, discovery export, modify attribute, or move action, select a target set from the created actions or create a new target set. In **Target Set**, select a target set or click **Create a new target set**.
  - e. Click **Next** to continue creating the action. Depending on the type of action that is selected, use the corresponding tables to better understand what options to select.



Copy action options	Action
Target Set	In the <b>Target Set</b> area, select a target set.
Destination Directory	In the <b>Destination Directory</b> text box, either enter a file path or use the list option to select a previously entered file path.
Directory Structure	In <b>Directory Structure</b> , select the check box if you want to <b>Recreate directory structure on destination</b> .
Hashes	In <b>Hashes</b> , select the check box if you want to <b>Compute a hash value for each data object</b> .
Harvesting	In <b>Harvesting</b> , select or clear the check box for <b>Do not auto-harvest destination volume after copy</b> .
Email Message Format	In the <b>Email Message Format</b> list, select the format of the email message.
SharePoint User Profile Items	In <b>SharePoint User Profile Items</b> , select the check boxes of application SharePoint items, including <b>Notes, Libraries, Blog Posts, Wikis, and Misc</b> .

Copy to Retention action options	Action
Target Set	In the <b>Target Set</b> area, select a target set.
Hashes	In <b>Hashes</b> , select the check box if you want to <b>Compute a hash value for each data object</b> .
Harvesting	In <b>Harvesting</b> , select the check box to <b>Do not auto-harvest destination volume after copy</b> if an automatic harvest of the retention volume is not wanted. If this option is selected, then the retention volume can be harvested with the discover retention volumes job on the data server.
Email Message Format	In the <b>Email Message Format</b> list, select the format of the email message.
Retention Tag	In <b>Retention Tag</b> , enter the key term for the tag.
Retention Period	In <b>Retention Period</b> , enter a number, and then select <b>Days, Weeks, Months, or Years</b> .

Delete action options	Action
Delete Parameters	In <b>Delete Parameters</b> , select the check box to <b>Do not delete data objects that have been accessed since last harvest</b> .

Discovery Export EDRM XML action options	Action
Destination Directory	In the <b>Destination Directory</b> text box, either enter a file path or use the list option to select a previously entered file path.

Discovery Export EDRM XML action options	Action
Unique ID Prefix and # of Digits	In <b>Unique ID Prefix and # of Digits</b> , enter a unique prefix and then the number of digits to follow that prefix. For example, if you enter a prefix of feb2012 with 7 digits, this entry yields a Unique ID similar to Feb2012-1234567.  Select the check box to <b>Pad Zeros</b> .  Select the check box to <b>Save a text copy</b> .
Email Message Format	In the <b>Email Message Format</b> list, select the format of the email message.
Limit Export Process	Select the check box to <b>Limit Export Process</b> to and enter the number of data objects.
SharePoint User Profile Items	In <b>SharePoint User Profile Items</b> , select the check boxes of application SharePoint items, including <b>Notes, Libraries, Blog Posts, Wikis, and Misc</b> .

Discovery Export DAT action options	Action
Destination Directory	In the <b>Destination Directory</b> text box, either enter a file path or use the list option to select a previously entered file path.
Unique ID Prefix and # of Digits	In <b>Unique ID Prefix and # of Digits</b> , enter a unique prefix and then the number of digits to follow that prefix. For example, if you enter a prefix of feb2012 with 7 digits, this entry yields a Unique ID similar to Feb2012-1234567.  Select the check box to <b>Pad Zeros</b> .
Email Message Format	In the <b>Email Message Format</b> list, select the format of the email message.
Limit Export Process	Select the check box to <b>Limit Export Process</b> to and enter the number of data objects.
SharePoint User Profile Items	In <b>SharePoint User Profile Items</b> , select the check boxes of application SharePoint items, including <b>Notes, Libraries, Blog Posts, Wikis, and Misc</b> .

Discovery Export DAT-Light action options	Action
Destination Directory	In the <b>Destination Directory</b> text box, either enter a file path or use the list option to select a previously entered file path.

Discovery Export DAT-Light action options	Action
Unique ID Prefix and # of Digits	In <b>Unique ID Prefix and # of Digits</b> , enter a unique prefix and then the number of digits to follow that prefix. For example, if you enter a prefix of feb2012 with 7 digits, this entry yields a Unique ID similar to Feb2012-1234567. <b>Note:</b> This is a required field.  Select the check box to <b>Pad Zeros</b> .
Email Message Format	In the <b>Email Message Format</b> list, select the format of the email message.
Limit Export Process	Select the check box to <b>Limit Export Process</b> to and enter the number of data objects.
SharePoint User Profile Items	In <b>SharePoint User Profile Items</b> , select the check boxes of application SharePoint items, including <b>Notes, Libraries, Blog Posts, Wikis, and Misc</b> .

Modify Attribute action options	Action
Action Name	In the <b>Action Name</b> , enter the action's name.
Action Type	In the <b>Action Type</b> list, select the <b>Modify Attribute</b> option.
Description of Action	In the <b>Description of Action</b> text box, enter the action's description.
Attribute Type	Select from the following options: <b>Read-only</b> or <b>Read-write</b> .

Move action options	Action
Destination Directory	In the <b>Destination Directory</b> text box, either enter a file path or use the list option to select a previously entered file path.
Directory Structure	In <b>Directory Structure</b> , select the check box if you want to <b>Recreate directory structure on destination</b> .

3. Click **Save** to save your changes, click **Back** to return to the previous page, or click **Cancel** to cancel creating the action.

---

## Deleting an action

Existing actions can be deleted from the list of available actions.

### Procedure

1. In the List of Actions page, select the action that you want to delete, and then click **Delete Action**. The Delete Action window appears.
2. Click **Delete** to delete the selected action. The action is removed from the List of Actions page and it is no longer available for use.

---

## Cloning an action

Actions can be cloned or duplicated.

## Procedure

1. In the List of Actions page, select the action that you want to clone, and then click **Clone Action**. The Clone Action dialog box appears.
2. In the Clone Action dialog box, complete these fields.
  - a. In the **Action Name** text box, enter the name of this action.

**Note:** The name of the cloned action must be different from the name of the original action.

- b. In the **Action Type** list, select the action type, and then click **Next** to continue creating the action.
- c. In the **Description of Action** text box, enter a brief description of this action.

**Note:** This action might be used by several people, so the description must be accurate.

- d. The selection that is made in the **Action Type** list determines what options are available after you click **Next**. If you are creating a copy, copy to retention, discovery export, or move action, select a target set from created target sets or create a new target set. In **Target Set**, select a target set or click **Create a new target set**.
  - e. Click **Next**. Depending on the type of action that is being cloned, you can see various options.
3. Click **Save** to save your changes.

---

## Editing an action

Existing actions can be modified.

### Procedure

1. In the List of Actions page, select the action that you want to edit, and then click **Edit Action**. The Edit Actions dialog box appears.
2. In the Edit Actions dialog box, edit the action as needed.
3. Click **Save** to save your changes.

---

## Chapter 7. Target sets

Some actions require a destination to complete, and a target set represents a mapping for each data server of the wanted target volume. To copy files, the data server must know where to copy the file to. Each data server must be configured with a list of target volumes, such as retention and discovery export volumes.

### Target Set Example

Data Server 1 has three retention volumes: Volume A, Volume B, and Volume C.

Data Server 2 has two retention volumes: Volume B, Volume X, and Volume Z.

Data Server 3 has two retention volumes: Volume B and Volume Z.

### Resulting Copy Action: You would like to create a target set for a copy action

Data Server 1 copies to Volume A.

Data Server 2 copies to Volume X.

Data Server 3 copies to Volume B.

Another user might want to create a target set for a copy action where Data Server 1, Data Server 2, and Data Server 3 copies to Volume B.

Table 20. Target set management columns and descriptions

Target set column name	Description
Target Set Name	Lists the name of the target set.
Type	Lists the type of the target set, namely <b>Primary</b> , <b>Retention</b> , or <b>Export</b> .
Source Type	Lists the target set's source type, for example, <b>CIFS</b> , <b>NFS</b> , or <b>SharePoint</b> .
Volumes	Lists the number of volumes in that target set.
Last Modified	Lists the date and time that the target set was last modified.
Description	Lists the description of the target set.

---

## Searching for a specific target set

When you have multiple target sets from which to choose, you can search for a specific target sets instead of using the slider to move through available options.

### Procedure

1. In the **Enter key terms...** text box, enter the name of the target set for which you would like to search, and then press **Search**. You can enter either the full target set name or a portion of it. To remove the search term, click the **X** to the left of the **Enter key terms....** text box. Target sets that match the entered search term are returned.
2. Edit, clone, or delete the target set as needed.

---

## Creating a target set

Retention, copy, move, and discovery export actions require a named destination to which data objects can be copied, moved, or exported. Target sets associate data servers and appropriate volumes, providing your actions with a destination.

### Procedure

1. Click **Target Sets**, and then click **Create Target Set**. The Create Target Set dialog box appears.
2. In the Create Target Set dialog box, complete these fields.
  - a. In the **Target Set Name** text box, enter a name for this target set.
  - b. In the **Description of Target Set** text box, enter a description.
  - c. In the **Type of Target Set** list, select the type of this target set, namely **Primary**, **Retention**, or **Export**.
  - d. In the **Source Type** list, select the source type of this target set, namely **CIFS**, **FileNet**, **IBM Content Manager**, **NFS**, **SharePoint**, or **Watson Curation**.
  - e. In the **Target Set List** area, click **Add Data Servers**. Select a data server and then click **Add** to move it to the **Target Set List** box. Click **Done** when you finish adding data servers for the target set. Use the **Ctrl** key to add or remove several selections simultaneously. The added data servers appear within the **Target Set List** box. Click **Add/Remove Data Servers** to modify what data servers appear here.
  - f. In the Create Target Set dialog box, click the added data server and then select a volume on that data server. Do this step for each added data server.
3. Click **Save** to save your configuration changes and create the target set.

---

## Editing a target set

Target sets can be edited, modifying the data servers that are associated with the target set.

### Procedure

1. On the List of Target Sets page, click the name of the target set that you would like to edit, and then click **Edit Target Set**. The Edit Target Set dialog box appears.
2. Edit the target set fields as needed.
3. Click **Save** to save your changes.

---

## Cloning a target set

Target sets can also be cloned or duplicated.

### Procedure

1. On the List of Target Sets page, click the name of the target set that you would like to clone or duplicate, and then click **Clone Set**. The Clone Target Set dialog box appears.
2. Edit the target set fields as needed.

**Note:** The cloned target set's name must be unique.

3. Click **Save** to save your changes.

---

## Deleting a target set

Existing target sets can be deleted from the list of available target sets.

### Procedure

1. In the List of Target Sets page, select the target set you would like to delete, and then click **Delete Set**. The Delete Target Set window appears.
2. Click **Delete** to delete the selected target set. The target set is removed from the List of Target Sets page, meaning that it is no longer available for use.





---

## Chapter 8. Reports

IBM StoredIQ contains a number of default reports and the ability to upload a report package.

IBM StoredIQ provides features to inventory unstructured data. It can then collect and evaluate unstructured data, compiling reports and jobs to act on the data according to an organization's needs. Reports can then be printed and disseminated, allowing teams to analyze data in an ad hoc manner. New reports can be added by uploading a report package.

IBM StoredIQ Administrator provides a number of built-in reports, such as summaries of data objects in the system, storage use, and the number of identical documents in the system. You can create custom reports, including Query Analysis Reports for e-discovery purposes, and automatically email report notifications to administrators and other interested parties. By default, these types of reports are available.

- Compliance Report
- CSV Exception List Export
- CSV Infoset Data Object Export
- Data Assessment Report
- Data Topology Report
- Duplication Summary Report
- Overlay Hit Report
- Term Hit Report

*Table 21. List of Reports options and descriptions*

Report column option	Description
Name	Name of the report
Created	The date and time at which the report was created
Description	A description of the report

**Note:** For help in customizing IBM StoredIQ reports, contact your technical service representative.

---

### Searching for a specific report

When you have multiple reports from which to choose, you can search for a specific report instead of using the slider to move through available options.

#### Procedure

1. In the **Enter key terms...** text box, enter the name of the report for which you would like to search, and then press **Search**. You can enter either the full report name or a portion of it. To remove the search term, click the **X** to the left of the **Enter key terms....** text box. Reports that match the entered search term are returned.
2. Select the wanted report.

---

## Creating a report

### Procedure

1. Click **Reports**, and then click **Create**. The Create Report dialog box appears.
2. In the Create Report dialog box, complete these fields.
  - a. In the **Name** text box, enter a name for this report.
  - b. In the **Description** text box, enter a description of this report.
  - c. Click **Choose File**, and then find and select the appropriate report-package file.
3. Click **Create**, and the newly created report is added to the List of Reports page.

---

## Chapter 9. Auto-classification models

Auto-classification models, also called automated document categorization, integrates the IBM® Content Classification's classification model into the IBM StoredIQ Platform info-set-generation process.

### IBM Content Classification

IBM Content Classification helps organize unstructured content by analyzing the full text of documents and emails and applying rules that automate classification decisions. By managing documents and email, you organize and act on content every day. IBM Content Classification reduces the burden of manual decision making that is done by employees by accurately and automatically organizing information. Embedded with natural language processing and semantic analysis capabilities, IBM Content Classification determines the true intent of words and then uses that knowledge to automate decision making. Unlike other classification systems that are based on rules only, IBM Content Classification combines rules and contextual analysis to incorporate real-time learning that adapts to changing business needs. As a result, classification becomes accurate over time.

IBM Content Classification can organize information by policies or keywords, but it can also assign metadata that is based on the full context of the document. The classification process not only searches for a single word or phrase, but also analyzes the entire document. It then distills the main point of the text and assigns the text to a category. When it analyzes content, IBM Content Classification can recognize misspellings, abbreviations, jargon, and technical terms.

Accuracy improves over time because the system adapts to the unique nature of your business by identifying different categories from examples that you provide. When you provide feedback, the system adjusts in real time and immediately implements any corrections that you make. The accuracy of the classification results keeps pace with changes in your business.

IBM Content Classification combines this context-based approach with a rule-based, decision-making approach. The system can identify keywords, patterns, such as account numbers and phone numbers of case identifiers, and words within a certain proximity of each other. For example, the system can identify occurrences of the phrase "Attorney General" in the same sentence as the word "California". When content that matches a condition in a rule is detected, the action that is defined for the rule is applied, and the document or email is classified.

### Examples of classification applications

You can use IBM Content Classification to achieve various business goals.

- **Enterprise content standardization:** To support document classification and taxonomy automation within your content management system, document properties or metadata can be automatically assigned when the content is classified. Documents can be automatically moved to the correct enterprise repository.
- **Compliance and records management:** Documents and email can be declared as records when they are classified and placed under the control of record retention policies and compliance standards.

- E-discovery readiness: Documents and email can be filtered to ensure that only items with business value are classified and archived. You can quickly and cost effectively prepare content for potential legal notices.
- Business process optimization: Automated decision making ensures more consistent outcomes and reduced costs. With content-based analysis, you accomplish these actions.
  - Insert documents into the workflow of a business plan.
  - Reroute email.
  - Suggest and apply agent responses within a customer-support center.

Using auto-classification, you can create and update classification models to help map data within infosets. The step-up snippet action extracts and stores text on data objects within an infoset. For auto-classification to work, you must use the step-up snippet action since infoset objects without extracted snippets do not have auto-classification scores.

The Data Expert can use IBM Content Classification to train a classification model. The classification model is then registered with IBM StoredIQ Administrator. The registered classification model can be applied to an existing infoset in IBM StoredIQ Data Workbench to generate new metadata for the objects in the infoset. Finally, this metadata can be used in rule-based filters to create new infosets.

**Note:** To use the IBM StoredIQ Administrator auto-classification function, users must have a licensed installation of the IBM Content Classification on their desktop.

---

## Applying the auto-classification feature

To use the auto-classification feature successfully, you must work in both IBM StoredIQ Administrator and IBM StoredIQ Data Workbench.

### Before you begin

Prior to preparing an IBM Content Classification model for import, you must finish downloading the classification export utility, which must be done only one time. The export utility is used for each IBM Content Classification model that you want to import.

### About this task

IBM Content Classification works by taking a sample set of documents that you adjust, constructing a classification model, and then classifying a new document. The IBM StoredIQ Platform defines the classification model as a decision plan with at least one knowledge base that is referenced by the decision plan.

### Procedure

1. In IBM StoredIQ Administrator, on the **Action** tab, the step-up snippet action is created automatically and appears in IBM StoredIQ Data Workbench.
2. In IBM StoredIQ Administrator, create an auto-classification model by importing a compressed file from IBM Content Classification.
3. In IBM StoredIQ Data Workbench, start the step-up snippet action, which is available on the **Act** tab, on an infoset.

**Note:** The infoset must be a user infoset, not a system infoset.

4. While still in IBM StoredIQ Data Workbench, apply the wanted auto-classification enhancement, which is available on the **Enhance** tab, to the same infoset.
5. In IBM StoredIQ Data Workbench, apply the auto-class filter, which is available on the **Create > Build Filter** area to the infoset, refining and creating a new infoset.
6. Review the results of the newly created infoset.

---

## Data server sizing-configuration guidelines

The inclusion of the IBM Content Classification server on the data server changed the required memory and processors. Data server sizing-configuration guidelines are provided here.

To support the auto-classification function, some of the data server configuration parameters changed. You must increase the virtual machine settings for processors and memory on data servers to these new minimums as part of this update:

- Memory: 16 GB
- vCPUs: 4

Required storage on the data server for the extracted text (snippet cache) is roughly 13% of the size of the uncompressed content, or 130 GB per 1 TB. The size can vary depending on the object types. The maximum amount of extracted text per item is configured to not exceed 2 MB by default.

A data server with 2 TB of configured storage can support approximately 10 TB of managed storage, assuming 50 million data objects with an average size of 200 KB. Approximately 300 GB is metadata storage with the remaining 1,700 GB supporting a combination of full text and extracted text.

---

## Downloading the classification export utility

The classification export utility is a one-time-only download that must be installed before an importing a model.

### Procedure

1. In IBM StoredIQ Administrator on the **Auto-Classification** tab, click **Download Classification Export Utility**. The `siq-classification-export.zip` file is downloaded.
2. Extract the export utility to the `bin` directory of your IBM Content Classification product installation. For Windows, it is typically in the `C:\IBM\ContentClassification\Bin` directory.

---

## Building an auto-classification model

Creating boolean-based rules to find documents that fit differing categories is time-consuming and requires constant, meticulous adjustments. However, importing a classification model with sets of training documents helps find other, similar documents.

### About this task

Using previously harvested data, you can create an auto-classification model.

## Procedure

1. Determine the categories into which you want the auto-classification model to classify documents.
2. Using IBM StoredIQ Data Workbench, create a filter for each category to capture documents that are representatives of the category.
3. For each filter, create an info set. The members of the resulting info set become the "training corpus" for the category.
4. For each info set, run a copy action with IBM StoredIQ Data Workbench onto a folder that is accessible by the IBM Content Classification application.
5. Use the IBM Content Classification application to create a decision plan and knowledge base by importing the training corpus that you created.

**Note:** A classification model consists of one decision plan and at least one knowledge base, which is a requirement of the IBM StoredIQ Platform auto-classification feature.

---

## Preparing an IBM Content Classification model for import

You must prepare the IBM Content Classification model for importing into IBM StoredIQ Platform with the IBM Content Classification tool `BundleDPKB.exe`.

### Before you begin

IBM StoredIQ Platform defines the IBM Content Classification model as a set of a single decision plan and one or more knowledge bases that are referenced by the decision plan. You must prepare each classification model for import by bundling the relevant decision plan and knowledge base with the IBM Content Classification export utility `BundleDPKB.exe`.

**Note:** Before you prepare an IBM Content Classification model for import, you must finish downloading and installing the classification export utility.

### Procedure

1. In a command interface, go to the `BundleDPKB` installation directory and then enter `cscript.exe ClassificationModelExporter.vbs <location of decision plan projects and knowledge bases> <decision plan directory> <optional empty directory> <optional zip file name>`. If you did not specify a directory to which the compressed file must be exported, an export directory is created in the `<location of decision plan projects and knowledge bases>` location.
2. Note the location and name of the generated compressed file.

---

## Importing an auto-classification model

You must complete these tasks before you can import an auto-classification model.

### Before you begin

- Download the classification export utility. The procedure must be done only one time.
- Prepare the IBM Content Classification model for import. This procedure must be completed for every model you want to import.

## About this task

To import a classification model, go to the **Auto-classification** tab of the IBM StoredIQ Administrator. The tab displays the already imported models as described in this table.

Table 22. Classification model column names and descriptions

Classification model column name	Description
Classification model name	Lists the name of the classification model.
Attribute name	Lists the name of the attribute that is used by the classification model.
Status	Lists the classification model's status, specifically <b>Available</b> , or <b>Pending</b> .
Creation date	Lists the date and time at which the classification model was created.
Description	Lists the description of the classification model.

## Procedure

1. Within IBM StoredIQ Administrator, click **Create Model**. The Create Model dialog box appears.
2. In the **Classification Model Name** text box, enter a unique name for this auto-classification model.
3. In the **Attribute Name** text box, enter a unique name for this attribute. The **Attribute Name** must be unique within auto-classifications as it cannot be changed after the classification model is imported.
4. In the **Description** text box, enter a description of this model.
5. In the **Auto-Classification Model File** text box, click **Browse** and select the classification model file that you want to use when you are creating the model. Generally, this file is a compressed file that is created in the classification export utility. It consists of elements that are created in IBM Content Classification by the Data Expert.
6. Click **Save**, and the newly created model appears in the list of classification models.

---

## Searching for a specific classification model

When you have multiple classification models to choose, you can search for a specific classification model instead of using the slider to move through available options.

## Procedure

1. In the **Enter key term(s)** text box, enter the name of the classification model for which you want to search, and then press **Search**. You can enter either the full classification model name or a portion of it. To remove the search term, click the **X** to the left of the **Enter key term(s)** text box. Classification models that match the entered search term are returned.
2. Edit, clone, or delete the classification model as needed.

---

## Editing a model

The terms and formats that are associated with a particular classification model change over time, which means that the classification model must also change. Classification models can be edited or updated, modifying the model file that is associated with that particular classification model.

### Procedure

1. On the List of Classification Models page of **Auto-classification** tab, click the name of the classification model that you want to edit, and then click **Edit Model**. The Edit Model window appears.
2. Edit the classification model fields as needed.

**Note:** Attribute names cannot be changed, but you can edit the name of the model without specifying a new model (.ZIP) file. If you attempt to modify a classification model that is being used, a warning appears. Click **OK** to return to the List of Classification Models page.

3. Click **Save** to save your changes.

---

## Deleting a model

Existing classification models can be deleted from the list of available models, if it was not used to enhance an infoset and that infoset still exists.

### Procedure

1. In the List of Classification Models page, select the classification model that you want to delete, and then click **Delete Model**. The Delete Model window appears.
2. Click **Delete** to delete the selected model. The classification model is removed from the List of Classification Models page. It is no longer available for use.



---

## Chapter 10. Concept management

Within IBM StoredIQ Platform, you can use the concept-management feature to relate business ideas to indexed data.

When you are using IBM StoredIQ Administrator, you use infosets, run actions, generate reports, and more generally, interact with IBM StoredIQ Platform as a whole. These technical aspects of using IBM StoredIQ Administrator are designed for more technical users. Concepts are designed for the business user and provide a user experience of creating a filter that finds documents that are owned by a particular user name, for example. This use of the product is oriented towards solving business problems. Using the product typically requires the user to translate business concepts like identity, department, vendor, and project into the various technical concepts of the product, such as filters and infosets.

A concept defines and represents an identity, custodian, vendor, and project that can be related to indexed data in a meaningful way. It is a set of attributes that describe and distinguish individual concept members. For example, an employee concept might define the attribute's user name, given name, surname, and email address.

Concept members are the granular building blocks of a concept. When concept members are defined, they can be gathered into groups for aggregate use.

The **Identity** concept is created as a predefined, preconfigured concept available within IBM StoredIQ eDiscovery.

The List of Concepts screen is simple, depicting concepts, identities, and aspects. From here, you can search for, delete, edit, and add identities.

*Table 23. Concept columns and descriptions*

Concept Column Name	Description
First name	Lists the given name.
Last name	Lists the surname.
Email address	Lists the email address.
Owner ID	Lists the owner identification number.
Company	Lists the member's company name.
Department	Lists the department of the member.

---

### Adding a member to a concept

Members can be added to existing concepts.

#### Procedure

1. Click **Concepts**.
2. From the list, select the type of concept you would like to add, and then click **Create Member**. The **Identity** concept was created as a predefined, preconfigured aspect. The Add Identity dialog box appears.
3. In the Add Identity dialog box, complete these fields.

- a. In the **First Name** text box, enter the identity's given name.
  - b. In the **Last Name** text box, enter the identity's surname.
  - c. In the **E-mail Address** text box, enter the identity's email address.
  - d. In the **Company** text box, enter the name of the company that is associated with this identity.
  - e. In the **Department** text box, enter the name of the identity's department.
  - f. In the **Owner ID** text box, enter the identity's owner ID.
4. Click **Cancel** to cancel adding an identity and return to the List of Concepts screen, or click **Save** to save the added member and return to the List of Concepts page.

---

## Searching for a concept

When you have multiple concepts available to choose, you can search for a specific concept instead of using the slider to move through available options.

### Procedure

1. In the **Enter key terms...** text box, enter the name of the concept for which you want to search, and then press **Search**. You can enter either the full concept name or a portion of it. To remove the search term, click the **X** to the left of the **Enter key terms....** text box. Concepts that match the entered search term are returned.
2. Edit or delete the concept as needed.

---

## Editing a member of a concept

Existing concepts and their members can be modified.

### Procedure

1. From the List of Concept page, select the concept that you want to edit, and then click **Edit**. The **Identity** concept was created as a predefined, preconfigured aspect. The Edit Identity dialog box appears.
2. Edit the concept member and click **OK** to save your changes.

---

## Deleting a member of a concept

Existing concept members can be deleted from the list of available concepts.

### About this task

**Note:** If you delete a member of a concept, existing filters that use that concept's members are affected.

### Procedure

1. From the List Concepts page, select the concept member that you want to delete, and then click **Delete**. The Delete Confirmation window appears.
2. Click **OK** to delete the selected concept member. The member of the concept is removed from the table and is no longer available for use.

---

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