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# Xerox<sup>®</sup> Lifecycle Manager for DocuShare<sup>®</sup> User Guide

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# 1. DocuShare Lifecycle Manager

## Overview

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

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

## 2. Using Lifecycle Manager

DocuShare Lifecycle Manager provides a link on the DocuShare home page. Selecting the link displays the Lifecycle Manager Policies Listing page. The page is used to create, edit, and delete policies as well as to display all policies.

To open the Lifecycle Manager Policies listing page:

1. Go to the DocuShare home page.
2. Under **Other Links**, select the **Lifecycle Manager Policies** link.

### Policy overview

Policies can be created for a single collection, a hierarchy of collections, or all the collections on the site. Several policies can be created for the same collection. When creating a policy, a user specifies what to monitor: a date property and an offset (the offset indicates whether the policy executes before or after the date property) or an exact date. Additionally, the user chooses whether to search specific objects for the date.

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

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

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

### Create policies

A policy can be created to receive notification of an approaching deadline or after a date has passed. If the user is a CPX user, they can create a policy to either start an automated process as defined in a content rule or start an automated process and send an email notification.

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

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

## Create a policy to send an email notification

To create a policy:

1. Open the Lifecycle Manager Policies page and select the **Create Lifecycle Manager Policy** button.
2. Enter a **Policy Title**.  
The title appears under the **Title** heading on the Lifecycle Manager Policies page.
3. In the **Collection Handle** field, enter the handle of the collection that contains the content to search.  
The user can enter **all** to search all the collections on the site.
4. From the **Search Scope** menu, select a DocuShare object type.  
By default, User, Group, Version, Rendition, Topic, Event, WeblogEntry, and WikiPage object types are excluded from the Search Scope.
5. From the **Object Type to Search** menu, select a specific type of object to search.  
Choices displayed in this menu are based on the selection from the Search Scope menu and include the default DocuShare object type and any custom object types.
6. In the **Policy Action** field, select **Send email notification**.
7. In the **Notify** field, select one of the following:
  - **Before or on a future date**—Find objects a specified amount of time before a property date value. **Date** information is required.  
Indicate the number of days, weeks, or months **Before** either Expiration Date or Last Synchronized.  
In the **Include Past Due Objects** field, choose whether to find objects that were in the collection before the policy was created and the date property to monitor is before the policy creation date. For example, to monitor the expiration date of documents, select **Yes** to have Lifecycle Manager find documents whose expiration dates are before the date the policy was created.
  - **After a past date**—Find objects a specified amount of time after a property date value. **Date** information is required.  
Indicate the number of days, weeks, or months **After** either Create Date, Expiration Date, Last Synchronized or Modified Date **Up to** a specified number of days.
  - **On a specific date**—Find objects on a specified date.  
Choose a date in the provided calendar for Create Date, Expiration Date, Last Synchronized or Modified Date.
8. In the **Additional Criteria** field, refine the search by specifying other property conditions through an added filter for addition criteria.  
One or more can be selected by selecting the '+'(plus) button at the end of the last criteria to allow a user to add more criteria for policy. There is a '-'(minus) button for non-last criteria to allow user to remove that criteria.

There is help text **[All of these conditions must be met]** appears under “Addition Criteria” to inform the user that all “Additional Criteria” are treated as a Boolean “AND” operation. Initially when the page loads, one row is displayed with just one row followed by the ‘+’ sign. If the user selects this ‘+’ sign, the second row will be shown with the ‘+’ sign and first row will display the ‘-’ sign. The user can delete the first row by selecting on this ‘-’ button. They can also add more rows by selecting ‘+’ on the last row.

A total maximum of six additional criteria can be applied. Therefore, there will be maximum 6 rows. Once system reaches the maximum of the 6<sup>th</sup> criteria, no further buttons will display on the sixth (6<sup>th</sup>) criteria. It indicates that the system reached its maximum criteria capacity.

9. From the **Next Run Date** calendar, select the next day/month/year when the policy should **run**.
10. From the **Next Run Time** menu, select the time of day when the policy should run on the selected Next Run Date.
11. From the **Period** menu, select how often the policy should run and send email notifications. Choices are Daily, Weekly or Monthly.
12. In the **Send Email To** field, do one, or both, of the following to specify the account to send the email notification to:
  - For user accounts, in the **Users** field, start typing the first part of a username, first name, last name, or email address until the account desired is displayed; then select the account. To enter multiple accounts in the Users field, separate each account entry with a comma.
  - For group accounts, in the **Groups** field, start typing the first part of a group title or email alias until the account desired is displayed; then select the account. To enter multiple accounts in the Groups field, separate each account entry with a comma.
13. In the **Notify Owner** field, select whether to send the email notification to the object owner. Select **Yes** to notify the owner; otherwise, select **No**.
14. In the **External Recipients** field, enter the email addresses for recipients who are not registered users on the DocuShare site. Separate email addresses with a comma.
15. In the **Comments** field, enter any information to be sent with the email notification.
16. In the Email Content field, there are radio buttons **Attached as .csv** and **HTML format** to allow user to choose a format the email content should display. The default option is **HTML format**; however, the user can change this option.

For the policy that create using **HTML format**, the email send out by LCM will be keep same format as previous version. For the policy that set **Attached as .csv**, the email sent out by LCM will store the html table content as a CSV file attached in Email.
17. In the **Policy Status** field, select one of the following:
  - **Enabled**—Activates the policy.
  - **Enabled for a Specific Date Range**—Sets the time period during which the policy is active. Specify the time period using the **Date Range** fields.
18. Select **Apply**.

## Create a policy to send a content rule event

To create a policy:

1. Open the Lifecycle Manager Policies page and select the **Create Lifecycle Manager Policy** button.
2. Enter a **Policy Title**.

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

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

The user can enter **all** to search all the collections on the site.

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

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

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

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

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

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

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

Indicate the number of days, weeks, or months **Before** either Expiration Date or Last Synchronized.

In the **Include Past Due Objects** field, choose whether to find objects that were in the collection before the policy was created and the date property to monitor is before the policy creation date. For example, to monitor the expiration date of documents, select **Yes** to have Lifecycle Manager find documents whose expiration dates are before the date the policy was created.

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

Indicate the number of days, weeks, or months **After** either Create Date, Expiration Date, Last Synchronized or Modified Date.

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

Choose a date in the provided calendar for Create Date, Expiration Date, Last Synchronized or Modified Date.

8. In the **Additional Criteria** field, refine the search by specifying other property conditions through an added filter for addition criteria.

One or more can be selected by selecting the '+' (plus) button at the end of the last criteria to allow a user to add more criteria for policy. There is a '-' (minus) button for non-last criteria to allow user to remove that criteria.

There is help text **[All of these conditions must be met]** appears under "Addition Criteria" to inform the user that all "Additional Criteria" are treated as a Boolean "AND" operation. Initially when the page loads, one row is displayed with just one row followed by the '+' sign. If the user selects this '+' sign, the second row will be shown with the '+' sign and first row will display the '-' sign. The user can delete the first row by selecting on this '-' button. They can also add more rows by selecting '+' on the last row.

A total maximum of six additional criteria can be applied. Therefore, there will be maximum 6 rows. Once system reaches the maximum of the 6<sup>th</sup> criteria, no further buttons will display on the sixth (6<sup>th</sup>) criteria. It indicates that the system reached its maximum criteria capacity.

9. From the **Next Run Date** calendar, select the next day/month/year when the policy should run.
10. From the **Next Run Time** menu, select the time of day when the policy should run on the selected Next Run Date.



11. In the **Policy Status** field, select one of the following:
  - Enabled—Activates the policy.
  - **Enabled for a Specific Date Range**—Sets the time period during which the policy is active. Specify the time period using the **Date Range** fields.
12. Select **Apply**.

To create a content rule for use with the policy, see [Use content rules with policies](#) on page 12.

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

To create a policy:

1. Open the Lifecycle Manager Policies page and select the Create Lifecycle Manager Policy button.
2. Enter a **Policy Title**.

The title appears under the Title heading on the Lifecycle Manager Policies page.
3. In the Collection Handle field, enter the handle of the collection that contains the content to search.

The user can enter all to search all the collections on the site.
4. From the Search Scope menu, select a DocuShare object type.

By default, User, Group, Version, Rendition, Topic, Event, WeblogEntry, and WikiPage object types are excluded from the Search Scope.
5. From the Object Type to Search menu, select a specific type of object to search.

Choices displayed in this menu are based on the selection from the Search Scope menu and include the default DocuShare object type and any custom object types.
6. In the Policy Action field, select Send both.
7. In the Event Occurs field, select one of the following:
  - **Before or on a future date**—Find objects a specified amount of time before a property date value. **Date** information is required.

Indicate the number of days, weeks, or months **Before** either Expiration Date or Last Synchronized.
  - **After a past date**—Find objects a specified amount of time after a property date value. **Date** information is required.

Indicate the number of days, weeks, or months **After** either Create Date, Expiration Date, Last Synchronized or Modified Date.
  - **On a specific date**—Find objects on a specified date.

Choose a date in the provided calendar for Create Date, Expiration Date, Last Synchronized or Modified Date.
8. In the Notify field, select one of the following:
  - **Before or on the event**—Send the email notification a specified amount of time before the event occurs. **Date** information is required.

Indicate the number of days, weeks, or months **Before or on the event**.

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

Indicate the number of days, weeks, or months **After the event** Up to specified number of days.

9. In the **Additional Criteria** field, refine the search by specifying other property conditions through an added filter for addition criteria.

One or more can be selected by selecting the '+'(plus) button at the end of the last criteria to allow a user to add more criteria for policy. There is a '-' (minus) button for non-last criteria to allow user to remove that criteria.

There is help text **[All of these conditions must be met]** appears under "Addition Criteria" to inform the user that all "Additional Criteria" are treated as a Boolean "AND" operation. Initially when the page loads, one row is displayed with just one row followed by the '+' sign. If the user selects this '+' sign, the second row will be shown with the '+' sign and first row will display the '-' sign. The user can delete the first row by selecting on this '-' button. They can also add more rows by selecting '+' on the last row.

A total maximum of six additional criteria can be applied. Therefore, there will be maximum 6 rows. Once system reaches the maximum of the 6<sup>th</sup> criteria, no further buttons will display on the sixth (6<sup>th</sup>) criteria. It indicates that the system reached its maximum criteria capacity.

10. From the Period menu, select how often the policy should run and send email notifications.
11. From the Next Run Date calendar, select the next day/month/year when the policy should run.
12. From the Next Run Time menu, select the time of day when the policy should run on the selected Next Run Date.
13. In the Send Email To field, do one, or both, of the following to specify the account to send the email notification to:
  - For user accounts, in the Users field, start typing the first part of a username, first name, last name, or email address until the account desired is displayed; then select the account. To enter multiple accounts in the Users field, separate each account entry with a comma.
  - For group accounts, in the Groups field, start typing the first part of a group title or email alias until the account desired is displayed; then select the account. To enter multiple accounts in the Groups field, separate each account entry with a comma.
14. In the Notify Owner field, select whether to send the email notification to the object owner. Select Yes to notify the owner; otherwise, select No.
15. In the External Recipients field, enter the email addresses for recipients who are not registered users on the DocuShare site. Separate email addresses with a comma.
16. In the Comments field, enter any information that to be sent with the email notification.
17. In the Email Content field, there are radio buttons **Attached as .csv** and **HTML format** to allow users to choose a format the email content should display. The default option is **HTML format**; however, the user can change this option.
 

For the policy that create using **HTML format**, the email sent out by LCM will be keep same format as previous version. For the policy that set **Attached as .csv**, the email sent out by LCM will store the html table content as a CSV file attached in Email.
18. In the Policy Status field, select one of the following:
  - Enabled—Activates the policy.
  - Enabled for a Specific Date Range—Sets the time period during which the policy is active. Specify the time period using the Date Range fields.

19. Select **Apply**.

## View, change, and delete policies

From the Lifecycle Manager Policies page, all the policies that a user owns can be viewed, previewed, changed, disabled, or deleted.

### View policies

1. Open the Lifecycle Manager Policies page. All the policies that the user owns is displayed.
2. To export a list of the user's policies, select the filetype hyperlink next to **Export Options**. This activates a download to the system. At launch, the export type is XML.

A sample policy XML appears below.

```
<?xml version="1.0"?>
<table>
  <row>
    <column> TestPolicy-2</column>
    <column>ArchiveFrom</column>
    <column>Document</column>
    <column>Expiration Date</column>
    <column>Notification</column>
    <column> Site Administrator</column>
    <column>Enabled</column>
    <column>04/15/2020 04:00 PM</column>
    <column></column>
  </row>
</table>
```

### Change a policy

1. Open the Lifecycle Manager Policies page.
2. Select the **Edit** button next to the title of the policy to be changed. The Edit Lifecycle Manager Policy page displays the properties that can be changed.
3. Change the properties desired and then select the **APPLY** button.

### Disable a policy

A policy is disabled when there is no requirement to have it active. The policy can be reenabled later.

1. Open the Lifecycle Manager Policies page.
2. Select the **Edit** button next to the title of the policy to disable.

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

## Delete a policy

1. Open the Lifecycle Manager Policies page.
2. Select the **Edit** button next to the title of the policy to delete.
3. At the bottom of the Edit Lifecycle Manager Policy page, select the **DELETE THIS POLICY** button.
4. Confirm the deletion by selecting **OK**.

## Preview a policy

1. Open the Lifecycle Manager Policies page.
2. Select the **Preview** button next to the title of the policy to preview.

A preview page displays a summary of the policy.

The system indicates: [The policy is running in the background. Please wait.](#)

A sample email displays below:

[Subject: Lifecycle Manager Preview Email: TestColl1 Alerts for 07/28/2019](#)

[<Recipients>](#)

[<It will contain an attachment in csv or html format>](#)

[This is the Lifecycle Manager preview email generated at 07/28/2019 11:14 PM. The actual run time result may be different due to content change and a different trigger time.](#)

[The scheduled next run time of this policy is at 07/29/2019 04:00 AM](#)

[The policy action is set as Send email notification. Total number of Document objects in the following list for which notification will be triggered : 1](#)

[Policy Title: TestPolicy-2](#)

[Description:](#)

The CSV displays with headings: Title, Handle, Document URL, Appears in, URL Appears in, Expiration Date, Owner, Owner Handles, Description, Create Date.

## Run a policy

Open the Lifecycle Manager Policies page.

Select the **Run Now** button next to the title of the policy to run immediately.

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

# Use content rules with policies

A content rule can be created to trigger an action when a Lifecycle Manager policy event occurs. This allows the user to automate actions such as document deletion or document routing. Using property settings, content rules can be run based on aging from a single policy or multiple policies. More than one content rule can be created for a single policy or multiple content rules for multiple policies.

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

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

DocuShare provides a wizard to guide you in creating a content rule. Using the wizard, you specify the title of the policy to use. To obtain a list of all a user's policies including their titles, see [View policies](#).

**Note:** To create a content rule, the user must be part of the Content Administrators group.

For more information on content rules, refer to the [DocuShare User Guide](#).

To create a content rule for use with a policy:

1. Locate the collection for which you created a policy to send a content rule event.
2. Do one of the following:
  - Select the collection's **Content Rules** icon.
  - Select the collection's **Properties** icon. Then select the **Content Rules** link.
3. On the Content Rules page, select **Create a New Content Rule**.

The Create a New Content Rule wizard appears. The following steps describe the required fields. For information about any of the optional fields in the wizard, select the appropriate field name.
4. On the Description page, enter a **Title** for the content rule. Summary and Description can be optionally entered. Select **Next**.
5. On the Event Triggers page under **When**, do the following:
  - a. Select **Lifecycle management**.
  - b. Select **Lifecycle policy**.
  - c. Optionally, select the object type and, if a document, the document type.
6. If the object is a container (collection, calendar, etc.), select one of the following choices from the **Event Applies To** menu. Then select **Next**.
  - **This container and immediate contents**—Triggers the action when the event occurs to the container and only its first nested level of objects.

For example, if a collection contains several objects and a subcollection, the action is triggered when the event occurs to any of the objects and the subcollection; the action is

not triggered when the event occurs to an object in the subcollection.

- **This container and all levels of contents**—Triggers the action when the event occurs to the container and all the objects under it.

For example, when the event occurs to any object in a collection regardless of its nested level, the action is triggered.

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

7. On the Content Property Conditions page under **Where the application specific conditions apply**, enter the policy title after **contains**. Then select **Next**.
8. On the Action Performed page, select the action to run when the event occurs and select **Next**.  
The Action Settings page appears. The options on the page vary depending on the action that was selected in the previous step.
9. Enter the appropriate information and select **Next**.
10. On the Completion Settings page, the user can choose to set a property value on the object when the content rule completes. In addition, the user can append the property value to any existing property values. Then select **Done**.

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

# 3. Configuring Lifecycle Manager

DocuShare Lifecycle Manager provides configuration pages in the Administration User Interface. An administrator uses the pages to select the properties that display in email notifications.

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

## Configure the email notification properties

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

To configure the email notification properties:

1. On the page footer, select **Admin Home**.
2. From the **Administration** menu, select **Content Management I Lifecycle Management I Email Notification Properties**.
3. From the **Possible Objects** menu, select the object type to configure for email notification.

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

4. In the **Possible Properties** field, select the properties to appear in email notifications and select the **Add** button. To select multiple properties, use the CTRL key (Windows) or the Command key (Macintosh).
5. In the **Selected Properties** field, select the properties to not include to appear in email notifications and select the **Remove** button. To select multiple properties, use the CTRL key (Windows) or the Command key (Macintosh).
6. To reorder the properties in the **Selected Properties** field, select a property and do one of the following  
To move the property before another property, select **Move Up**. To move the property after another property, select **Move Down**.
7. Select **Apply**.
8. To configure other object types, repeat these steps.

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