



# Installation Guide

**Classified Records**

**(Feature-Activated)  
For SharePoint 2013/2016**

**Software Version 4.13.1**

**January 2019**

Title: *Gimmal Compliance Suite – Classified Records Installation Guide*

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## Preface

Gimmel delivers market leading content governance and compliant records solutions built on Microsoft® SharePoint®. Gimmel solutions drive user adoption and simplify information access by making information lifecycle management of content simple and transparent, ensuring consistent compliance and proactive litigation readiness enterprise-wide while lowering costs.

Gimmel's Compliance Suite combines with SharePoint to give your organization a reliable and centralized repository for collaboration and records management that is compliant with the standards of the Department of Defense (DoD) 5015.2 [Records Management Program](#).

The Classified Records product is a separate, optional solution you install and use with Gimmel Compliance Suite (Cs). Organizations wanting to use this functionality must first install and configure Gimmel Compliance Suite.

Classified records extend the Compliance Suite's RMA Record and all functionality present in the latter is also available for Classified Records. Classified Records has extended security controls that can be graded by an authorized user manually or automated by the system.

Gimmel developed Classified Records in accordance with the DoD 5015.2 Chapter 3 - Management of Classified Records and it's certified to this standard (<http://jitc.fhu.disa.mil/projects/rma/reg.aspx>).

Compliance Suite must be completely installed before Classified Records is installed.

## Who Should Use This Guide

The intended audience for this document consists of SharePoint Administrators. Administrators are considered to be SharePoint power users who are familiar with the enterprise's content management and retention policies.

## Introduction

This document provides detailed installation steps for Gimmal Compliance Suite – Classified Records. These steps include installation, initial configuration, enhanced search configuration, and activating classification on new content types.

## Installation

This chapter provides step-by-step instructions for installing Classified Records.

### Note

Gimmel's Compliance Suite 4.13.1 must be completely installed before you begin installation of Classified Records. Classified Records 4.13.1 will not work with previous versions of Compliance Suite.

## Adding Classified Records to Your Farm

Follow these steps to add Classified Records to your farm:

1. Navigate to the location of the Certified Records Management ISO download folder and double-click the **setup.hta** file. The Certified Records Management splash screen opens.



2. Click **Install Classified Records**. A Windows PowerShell opens and the installation script runs automatically.

## Note

Your system might require you to run **set-executionpolicy** before running the install file.

3. Wait for the script to complete.

## Upgrading Classified Records

Follow these steps to upgrade Classified Records from a previous version:

1. Navigate to the location of the Certified Records Management ISO download folder and double-click the **setup.hta** file. The Certified Records Management splash screen opens.



Figure 1 Splash Screen

2. Click **Upgrade Classified Records**. The upgrade process starts. You first see WSPs being upgraded, which deploy new assemblies, files, etc.

```

Administrator: Windows PowerShell
*****
*
*           Gimmel SharePoint Solution Setup           *
*
*****
Validating Solution File (WSP) Versions
  GimmelSoft.CS.ClassifiedRecords.wsp .....Valid
Preparing for Setup
  Stopping the SharePoint Timer Service ..... Done
  Stopping IIS ..... Done
  Starting IIS ..... Done
  Starting the SharePoint Timer Service ..... Done
Deploying Solution Packages
  Adding GimmelSoft.CS.ClassifiedRecords.wsp ..... Done
  Deploying GimmelSoft.CS.ClassifiedRecords.wsp ..... Done
Resetting SharePoint Processes
  Stopping the SharePoint Timer Service ..... Done
  Stopping IIS ..... Done
  Starting IIS ..... Done
  Starting the SharePoint Timer Service ..... Done

```

Figure 2 Upgrading WSPs

**Note:** Your system may require you to run `set-executionpolicy` before running the setup file.

3. Once all WSPs finish upgrading, the script launches another PowerShell window and begins to upgrade features.
4. Once finished, the script displays, "Press Any Key to Continue..." Doing so finishes upgrading the features and closes the window.

Once all features are upgraded, the script activates or reactivates new and upgraded features, if necessary. Once finished, the script prompts you to "Press Any Key to Continue..."

## Verifying Classified Records

Follow these steps to verify Classified Records:

1. In Central Administration, click **System Settings**.
2. Click **Manage farm solutions**.



Name	Status	Deployed To
<a href="#">gimmelsoft.common.wsp</a>	Deployed	http://dltpm01.dltdomain01.local/
<a href="#">gimmelsoft.cs.alerts.wsp</a>	Deployed	Globally deployed.
<a href="#">gimmelsoft.cs.bulkprocessing.wsp</a>	Deployed	Globally deployed.
<a href="#">gimmelsoft.cs.classifiedrecords.wsp</a>	Not Deployed	None
<a href="#">gimmelsoft.cs.common.wsp</a>	Deployed	Globally deployed.

Figure 3 Selection Classified Records File to Deploy

3. Select **gimmelsoft.cs.classifiedrecords.wsp**.
4. Click **Deploy solution** and proceed to deploy to the relevant web applications.

## Activating Features

The Classified Records solution contains a number of features that you can activate using the steps in this section.

### Note

Be sure that you have not logged in as a system account before you activate features in Classified Records.

### Farm Level Feature

This feature installs the Classified Records database and configures the required managed properties for search and help. You must activate this feature first.

1. In Central Administration, click **System Settings**.
2. Click **Farm Management > Manage farm features**.
3. Locate the Classified Records feature and click **Activate**.



Figure 4 Activating the Farm Level

4. Locate the Classified Records Help feature and click **Activate**.



Figure 5 Activating Classified Records Help

## Note

If you need to deactivate Classified Records features, you must deactivate the farm level feature and the three site collection level features described below.

### Web Application Level Feature

This feature installs and configures the timer jobs used for classified records.

1. In Central Administration, click **Application Management**.
2. Select **Web Applications > Manage web applications**.
3. Highlight the relevant web application(s) where Classified Records was previously deployed.
4. Click **Manage Features** in the ribbon menu.
5. Locate the Classified Records feature and click **Activate**.



Figure 6 Activating Timer Jobs

### Site Collection Level Features

There are three site collection level features. You **MUST** activate Gimmel Compliance Suite – Classified Records before activating Audit Trimming or Classification Prominence.

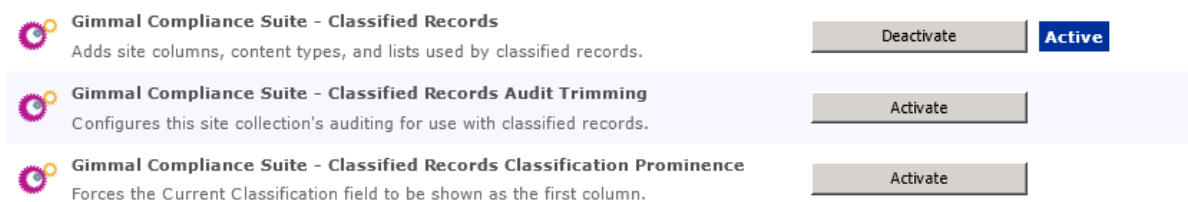


Figure 7 Site Collection Level Features

- Gimmel Compliance Suite - Classified Records
  - This feature contains the fields, content types, and lists required by Classified Records and must be activated first.
    - a. In your site, click **Site Actions** and then **Site Settings**.
    - b. Under Site Collection Administration, click **Site collection features**.
    - c. Locate the Classified Records feature and click **Activate**.

- Gimmel Compliance Suite – Classified Records Audit Trimming  
This feature configures additional functionality for managing audit logs related to classified records.
- Gimmel Compliance Suite – Classified Records Classification Prominence  
This feature configures the Current Classification column to display as the first column in all lists in the site. This feature is also optional. Follow the activation steps in the first bullet to activate.

## Initial Configuration

This chapter describes initial configuration for Classified Records.

### Term Store Security Configuration

The Application Pool managed account for the web application under which Classification Records is running must be added to the Term Store Administrators group.

1. In Central Administration, click **Application Management**.
2. Click **Manage service applications**.
3. Highlight the Managed Metadata Service and click **Manage** in the ribbon menu.
4. When the Term Store Management Tool displays, add the app pool user to the Term Store Administrators.

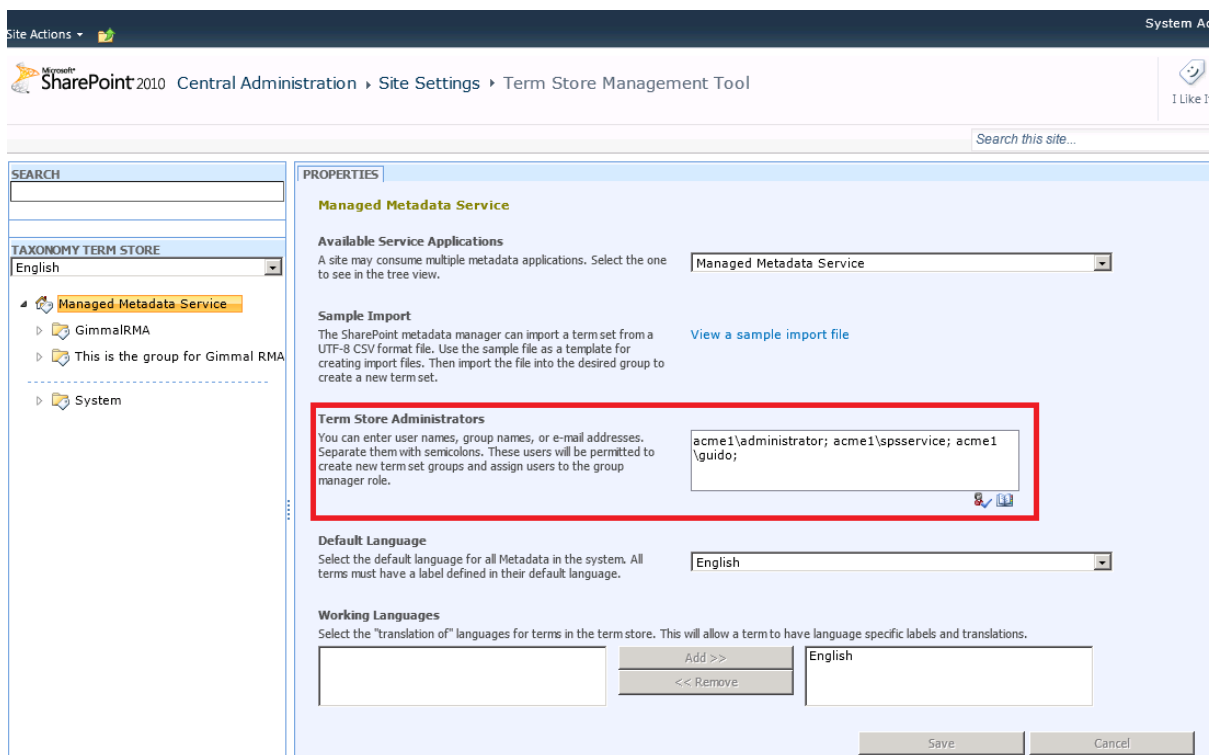


Figure 8 Adding Term Store Administrators

5. Click **Save**.

#### Note!

Before any users can declare Classified Records, Security Classifications must be defined (see the latest version of the *Classified Records Administration Guide*).

## Enhanced Search Configuration

Complete this step if your installation meets the following prerequisites:

- The Gimmal Enhanced Search solution is installed and active
- The Classified Records Classification Prominence site level feature has been activated

The configuration steps involve adding the Current Classification column to the list of columns available to Enhanced Search.

1. In Central Administration, select **General Application Settings** from the **Enhanced Search Administration** menu. The Configure Managed Properties window displays.
2. In the **Managed Properties** list, select **Current Classification** and move it into the **Available for Enhanced Search Results** list.

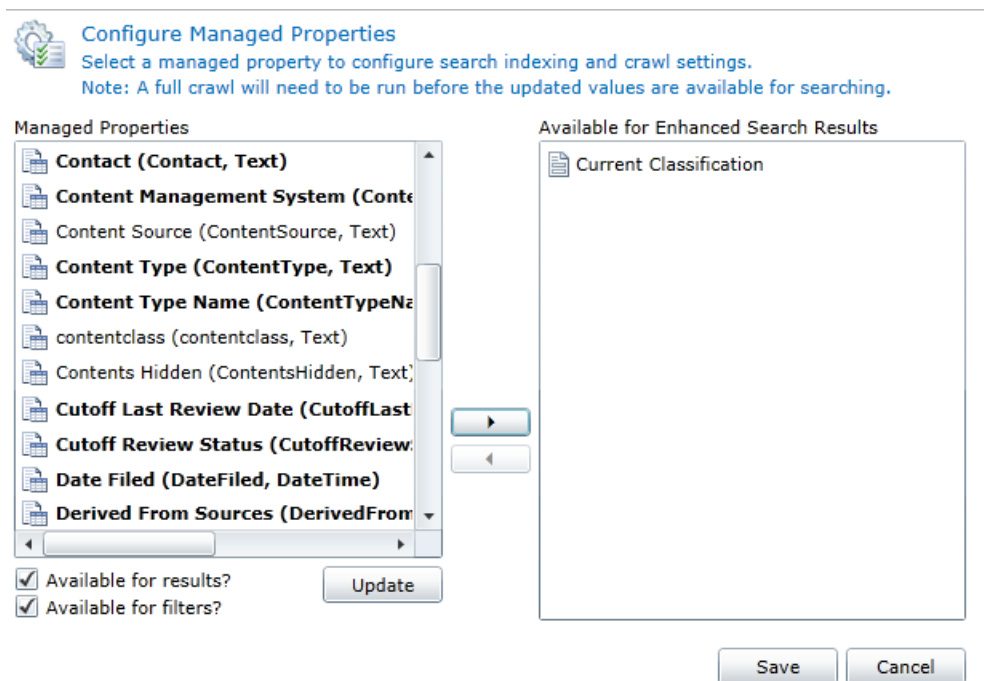


Figure 9 Enhanced Search Properties

3. Click **Save**.

## Activating Classification on New Content Types

Any content type derived from an RMA Record can be configured to represent a classified record.

1. Go to your Site Collection.
2. Click **Site Actions/Site Settings** in the site where the features are activated.
3. Under **Classified Records**, click **Classify Non-Standard Content Types**.
4. Locate the relevant content type(s) and click **Enable**.

### Note

By default, the RMA Record content type along with the standard DoD content types (Correspondence Record, Digital Photo Correspondence Record , Digital Photo Record , Non-Electronic Correspondence DoD Record , Non-Electronic DoD Record , PDF Correspondence Record , PDF Record , Scanned Correspondence Record , Scanned Record , Web Correspondence Record, and Web Record ) are all activated.