Lab 5: Building a Records Repository

**Lab Time: 45 Minutes**

**Lab Directory: ECM401.CustomRepository**

**Lab Overview:**

In this lab, you will create a controlled records repository for the Litware legal and accounting departments. The repository will be used to store contracts and legal documents related to ongoing litigation involving Litware and its suppliers. It will also be used to house annual reports produced by the accounting department.

# Exercise 1: Creating a Record Center Site Collection

1. In this exercise, you will setup a separate site collection for official records. In order to facilitate greater administrative control over the contents of the repository, you will create the site collection in a new web application.

Note: Using a separate web application makes it easy to partition official records from other types of content. The web application you create will have its own content database and will be used exclusively to store and manage official documents.

1. Open the web browser and navigate to the **Central Administration** website located at **http://litwareserver:9999** . When the page opens, click the **Application Management** tab. From the Application Management page, click **Create or extend Web application** in the **SharePoint Web Application Management** section.
2. On the **Create New Web Application** page, click **Create a new Web application** . In the **IIS Web Site** section, select the default **Create a new IIS web site** . Enter **SharePoint - Records Repository** into the **Description** field. Enter **9997** into the **Port** field. Leave the **Host Header** field blank.
3. Scroll down to the **Application Pool** section. Select **Create new application pool** and enter **SharePoint - Records Repository** as the Application pool name.
4. Select **Configurable** under **Select a security account for this application pool** . Enter **LITWAREINC\Administrator** as the user name. Enter **pass@word1** as the password.
5. Click the **Restart IIS Automatically** radio button.
6. Scroll down to the **Database Name and Authentication** section. Enter **WSS\_OfficialRecords** into the **Database Name** field.
7. Click **OK** to create the new web application. On the **Application Created** page, click the **Create Site Collection** link.
8. On the **Create Site Collection** page, ensure that **http://litwareserver:9997** is showing in the **Web Application:** dropdown in the **Web Application** section.
9. Enter **Litware Records** in the Title field. Enter any description you like and then scroll down to the **Template Selection** section. Click the **Enterprise** tab and select the **Records Center** site template.
10. In the **Primary Site Collection Administrator** section, enter **Administrator** and press **ctrl+k** to resolve the name. Enter **AngelaB** as teh **Secondar Site Collection Administrator** . Press **ctrl+k** again to resolve the name.
11. Press **OK** to create the top-level site. From the **Top-Level Site Successfully Created** page, click the link to open the site and verify the site URL **http://litwareserver:9997** .
12. You have now created a records repository site. In the next exercise, you will configure the repository to accept official records.

# Exercise 2: Setting up Routing Types

1. In this exercise, you will configure the record center to accept specific kinds of documents. For the legal department, you will setup a document library to hold legal documents like contracts and service agreements, as well as litigation support documents like motions and other court filings. For the accounting department, you will setup a separate document library to hold annual reports and financial statements.
2. From the quick launch navigation bar on the left side of the record center home page, click the **Documents** link. From the **All Site Content** page, click **Create** . On the **Create** page, click **Document Library** . Enter **Legal Documents** as the library name, along with a description and click **Create** .
3. Now create a second document library called **Financial Documents** .
4. Navigate back to the home page and click **Configure Record Routing** from the Links list at the top right of the page. On the **Record Routing** page, click **New** to create a new routing type. Enter the information you see below.
5. Now create a second routing type for financial records.
6. When you are finished, your **Record Routing** page should look similar to the following:
7. Now that you have created your record center site and configured the record routing types, you can complete the configuration of the SharePoint Farm so that users can send documents to the repository easily from the SharePoint UI.
8. Open the **Central Administration Web** site again. Navigate to the **Application Management** page and select **Records center** in the **External Service Connections** section.
9. On the **Configure Connection to Records Center** page, click **Connect to a Records Center** . Enter **http://litwareserver:9997/\_vti\_bin/officialfile.asmx** as the URL and enter **Litware Records** as teh title.

# Exercise 3: Submitting Documents

1. In this exercise, you will test your work by submitting documents from various places to the records repository.
2. Open the browser and navigate to the sample records management site at **http://litwareinc.com/sites/recman** .

Note: If this site does not exist, simply create a new site at that location before continuing with the exercise.

1. Select Site Settings from the Site Actions menu and open the content types gallery for the site.
2. Create the following content types:
3. When you are finished, the content gallery should look like the following illustration.
4. Click **Site Actions -> Create** and create a new **Document Library** called **Shared Documents** . Open the **Document Library Settings** page and click the **Advanced Settings** link. Select **Allow management of content types** and click **OK** .
5. On the **Custom Shared Documents** page, click **Add from existing site content types** in the **Content Types** section.
6. On the **Add Content Types: Shared Documents** page, select the content types you just created from the list and click the **Add** button. Now you can navigate back to the **Shared Documents** page and upload according to the type of document it is.
7. Select any document and then choose **Send To -> Litware Records** from the context menu. When the operation has completed, navigate to the record center at **http://litwareserver:9997** . You should see the document in the appropriate library, depending on its content type.

**This concludes the lab exercises.**