



*Enterprise Content Management*

# What is new in FileNet Content Manager 4.5 and Workplace XT 1.1.3

BCS, DITA, MS Office, and more

# Agenda

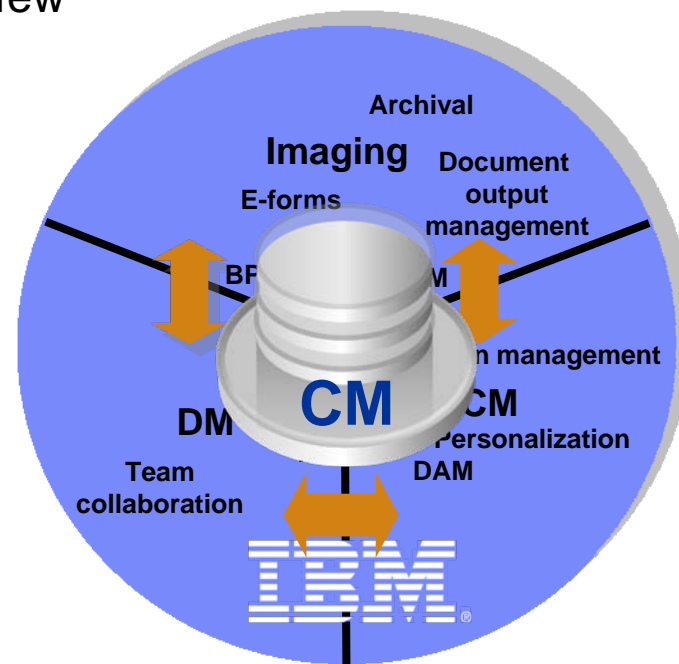
- Market Overview and Trends
- Business Content Services
  - Workplace XT
  - MS Office integration
  - DITA and Quark
- Technical Improvements

# ECM Market

- The ECM market materialized over the period of a few years through integration and consolidation of existing technologies and applications
- ECM will extend down market through increasing BCS functionality becoming part of ECM suites...
- ... while at the high-end integrating more and more with LOB applications to create high value CEVAs

**Business Content**  
*"Arms information workers"*

**Transactional content**  
*"Processes consume content"*



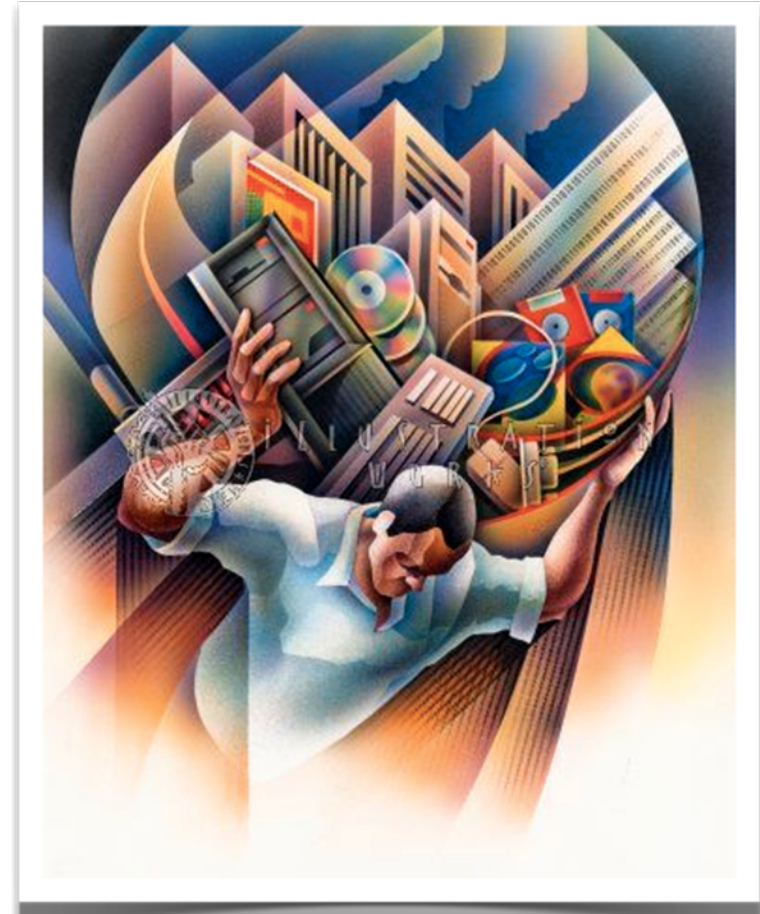
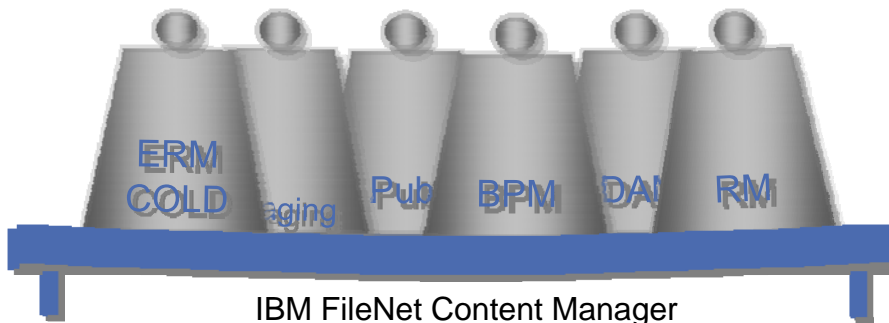
At the core of ECM is the Content Repository:  
 Content Manager

# What is IBM FileNet Content Manager?

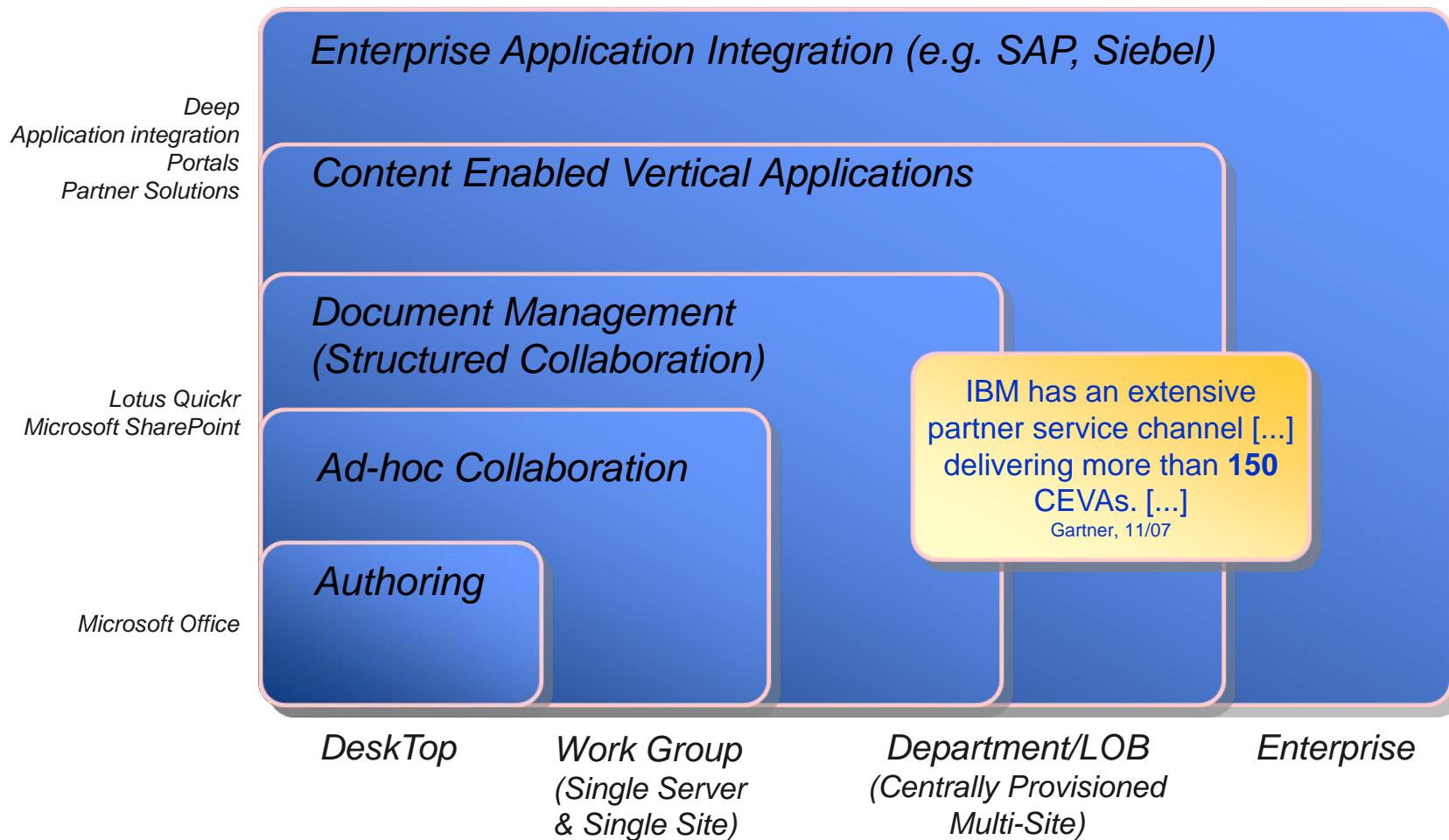
FileNet CM is the underlying repository in which all content within the IBM FileNet ECM platform is stored.

Providing repository Services such as:

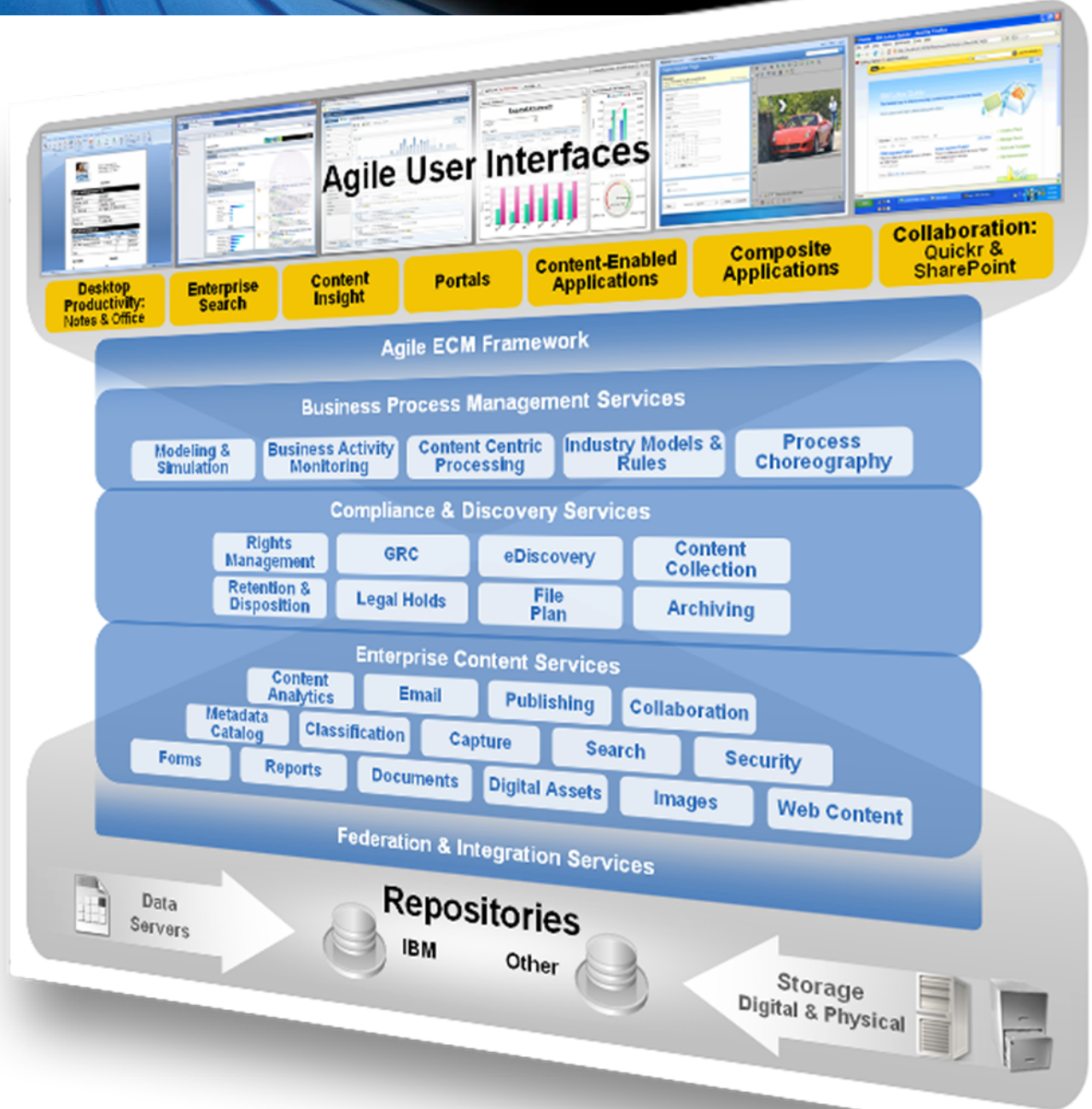
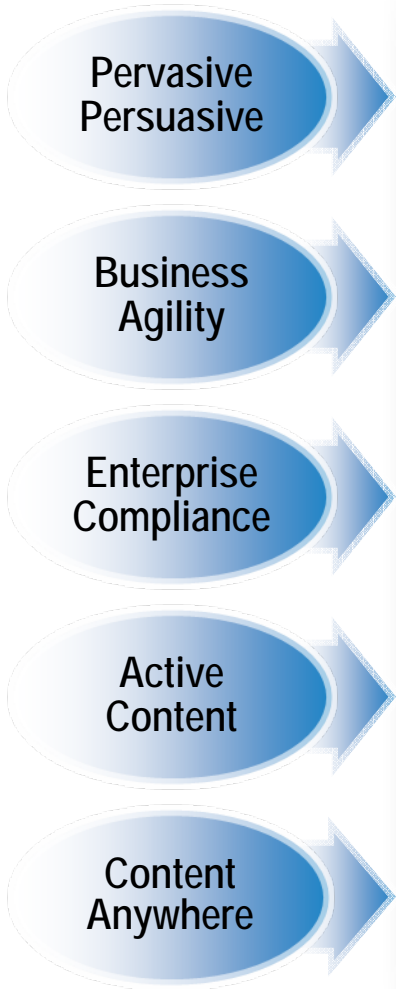
- Versioning
- Security
- API's to access content
- Standard UI
- Metadata management
- ...



# Who uses ECM: the ECM Usage Model



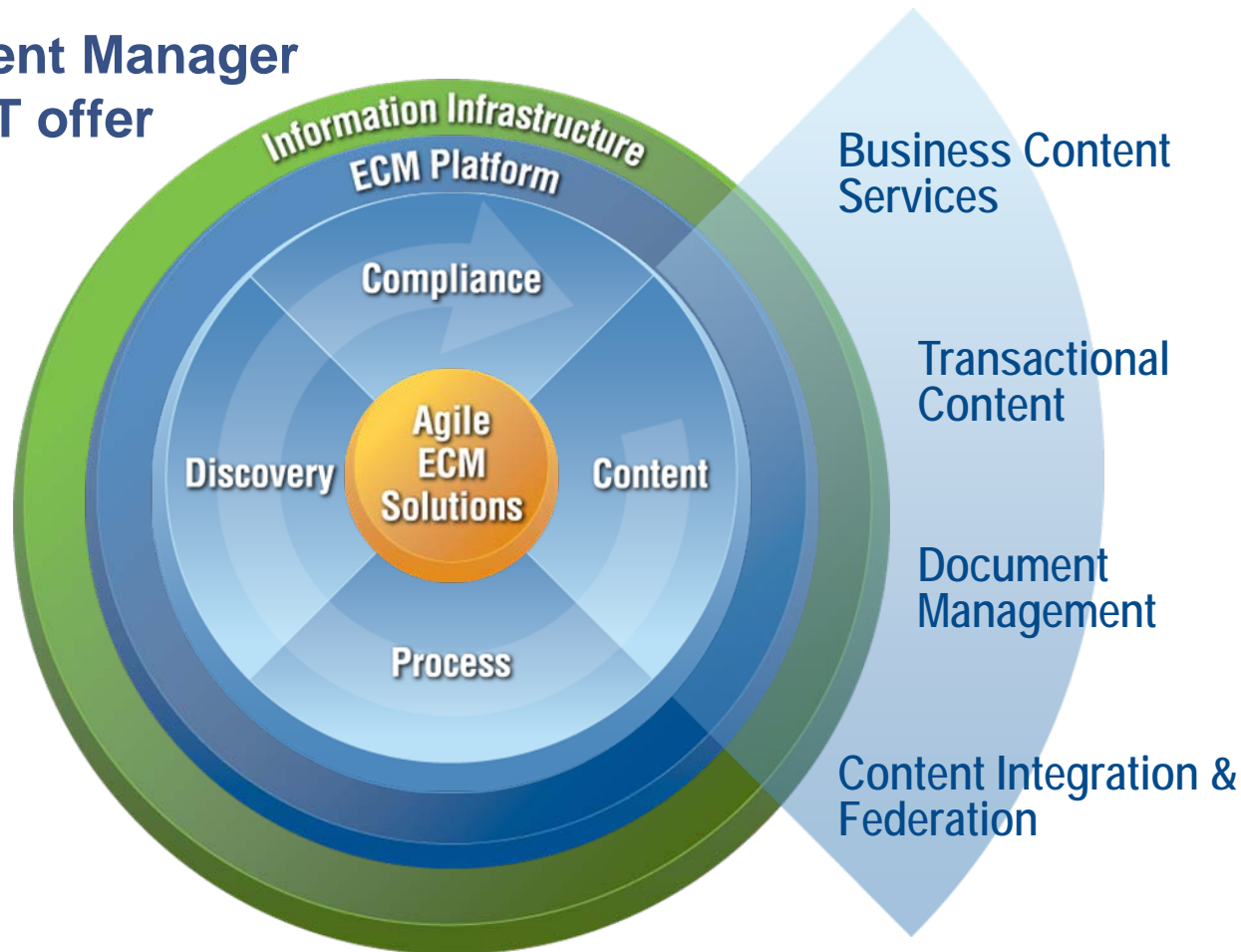
# IBM Agile ECM Product Strategy



# Executing our Business Content Services Strategy

## IBM FileNet Content Manager and Workplace XT offer BCS for:

- MS Office 2007
- Word
- Excel
- PowerPoint
- Explorer
- Email
- File Shares
- MS SharePoint
- ECM Web Parts
- Archiving
- Lotus Quickr
- DITA XML content



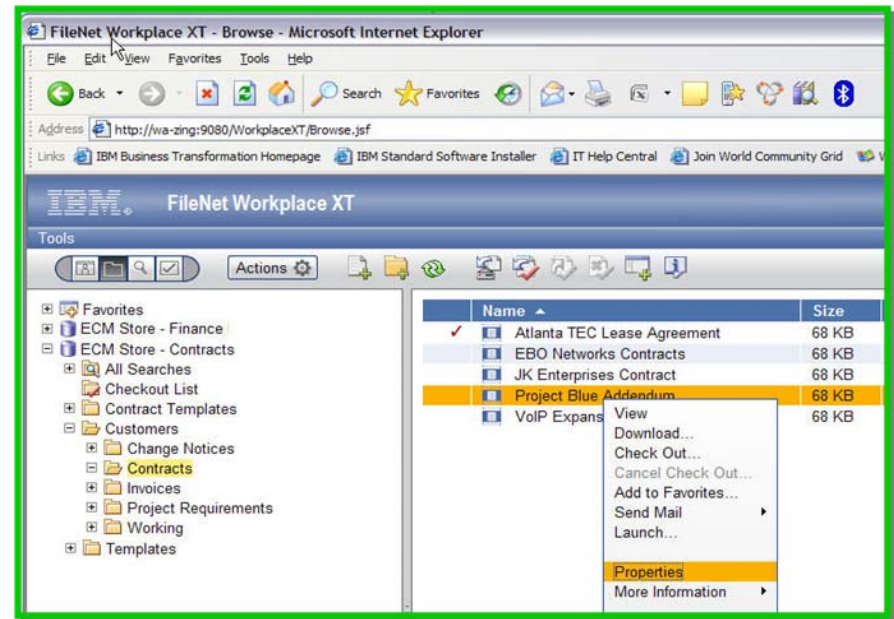
# Agenda

- Market Overview and Trends
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  - Workplace XT
  - MS Office integration
  - DITA and Quark
- Technical Improvements



## What is Workplace XT 1.1.3?

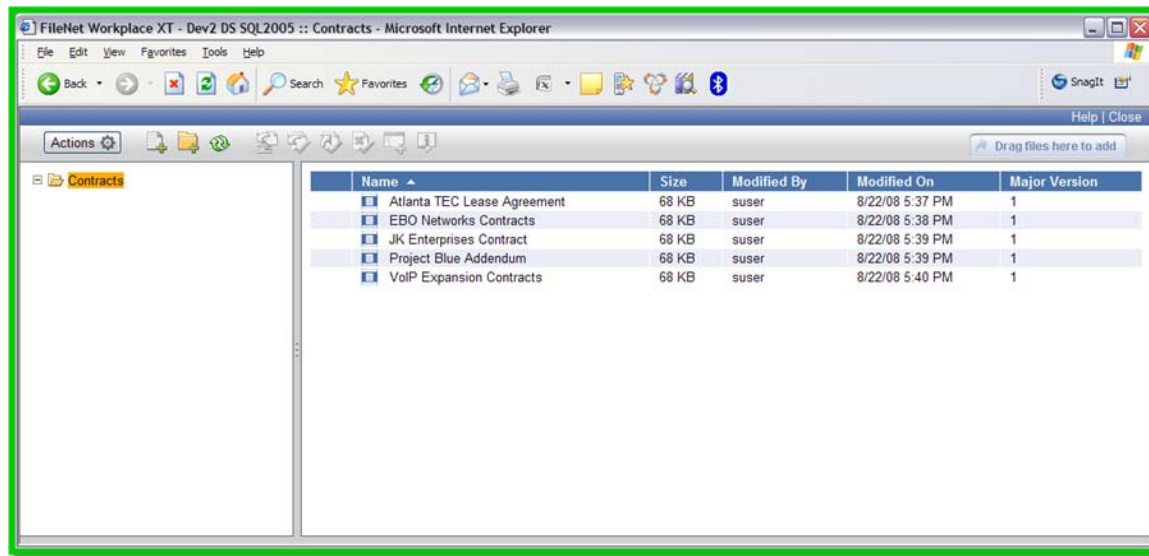
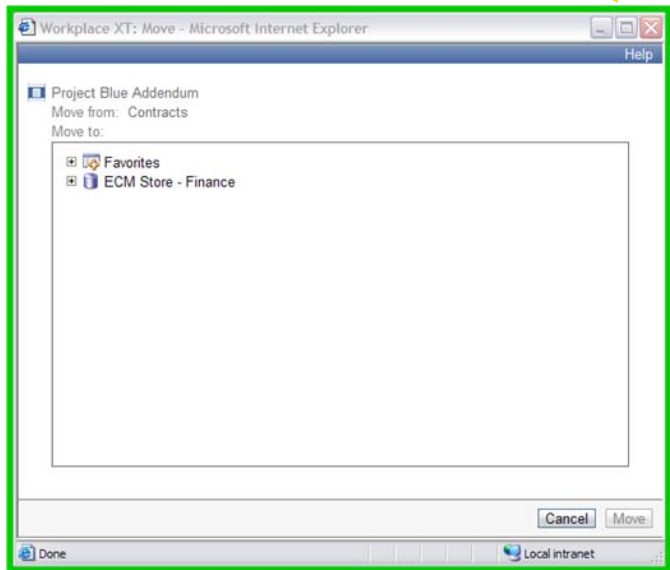
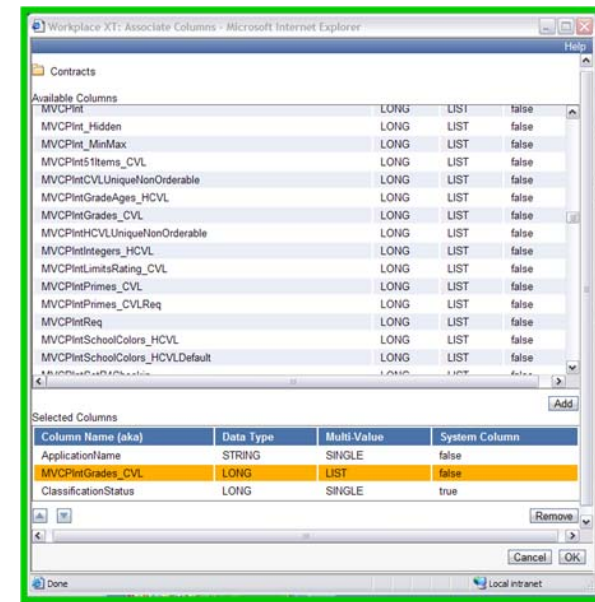
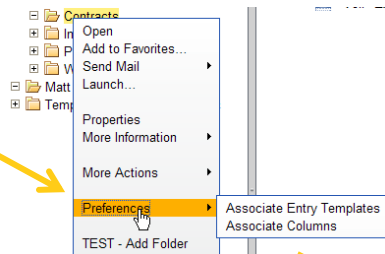
- Out-of-the-box user interface for FileNet Content Manager
- Designed to cover most common use cases with the business user in mind
- Using AJAX for dynamic updates within page
- Supports FileNet Content Manager 4.0 and 4.5
- Carrier for new MS Office integration
- SSO support of Kerberos using SPNEGO
- View support of CMOD and CM8 images



# What's New in Workplace XT 1.1.3

## Improved **folder** user experience

- Customizable column list views
- Improved folder bookmark view
- Improved Move and File In
- New Add folder wizard



# What's New in Workplace XT 1.1.3

## Improved **search** user experience

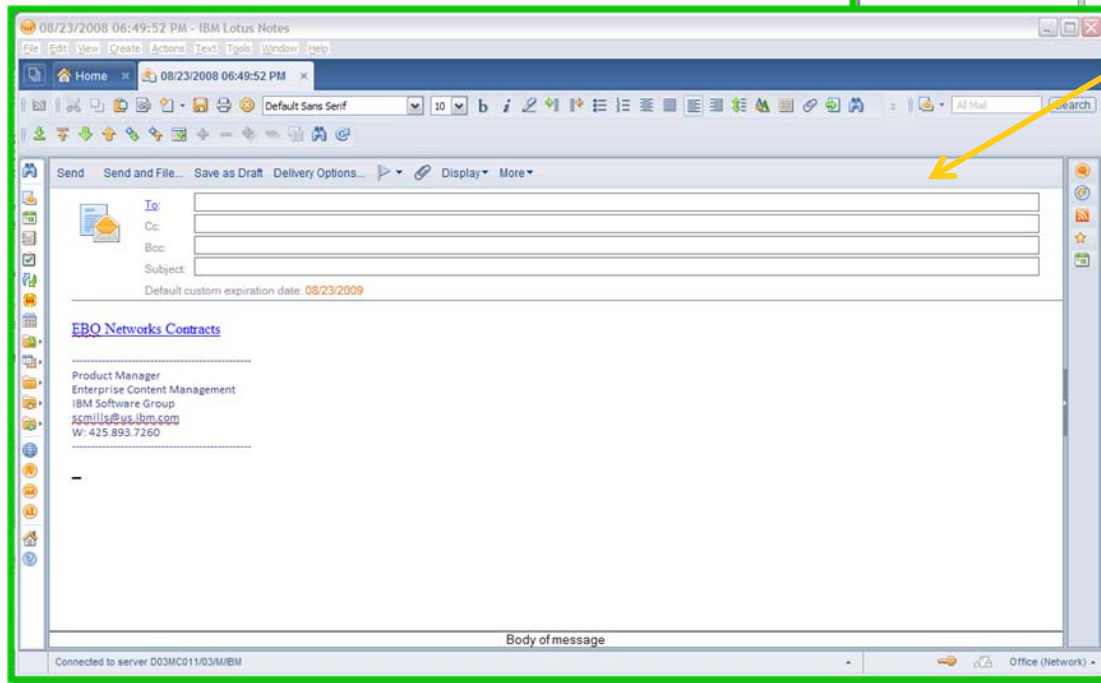
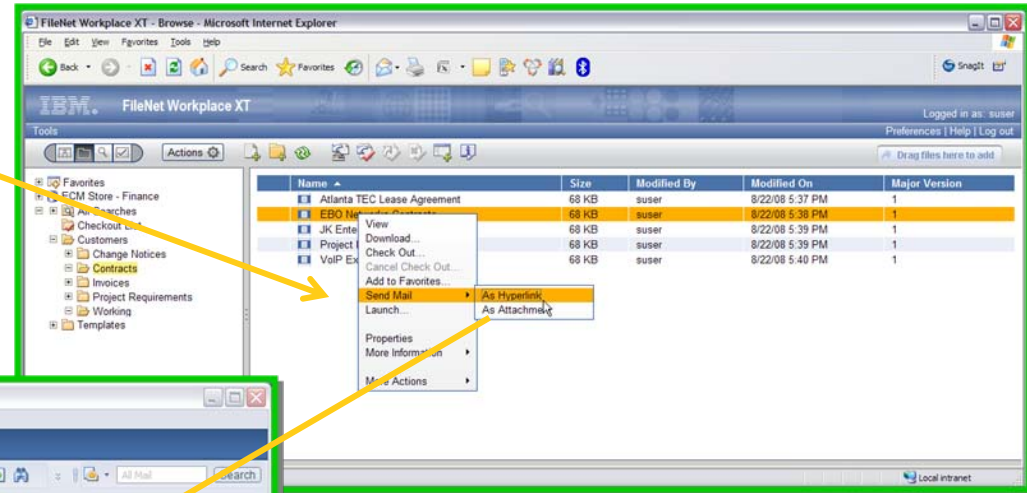
- Property criteria controls
- Combined Property and Keyword search
- Multi-value support in result set

The screenshot displays the Workplace XT search interface. The search criteria are set to 'ECM Store - Finance' and 'Search subfolders'. The search terms are 'Contracts'. The 'Match conditions' are set to 'all'. The 'Sort' criteria are 'Pub MVCP Str' and 'starts with'. The search results are displayed in a table below.

Name	Pub MVCP Str	Size	Modified By	Modified On	Major Version	Address
Contract Agreements	Collaboration Agreements; Construction Agreements; Consulting Agreements; Donation Agreements		suser	8/23/08 6:32 PM	0	
Contract Policies for SEC Filings	Distribution Plans; Donation Agreements; Earn Out Agreements; Employee Stock Purchase Plans		suser	8/23/08 6:35 PM	0	

# What's New in Workplace XT 1.1.3

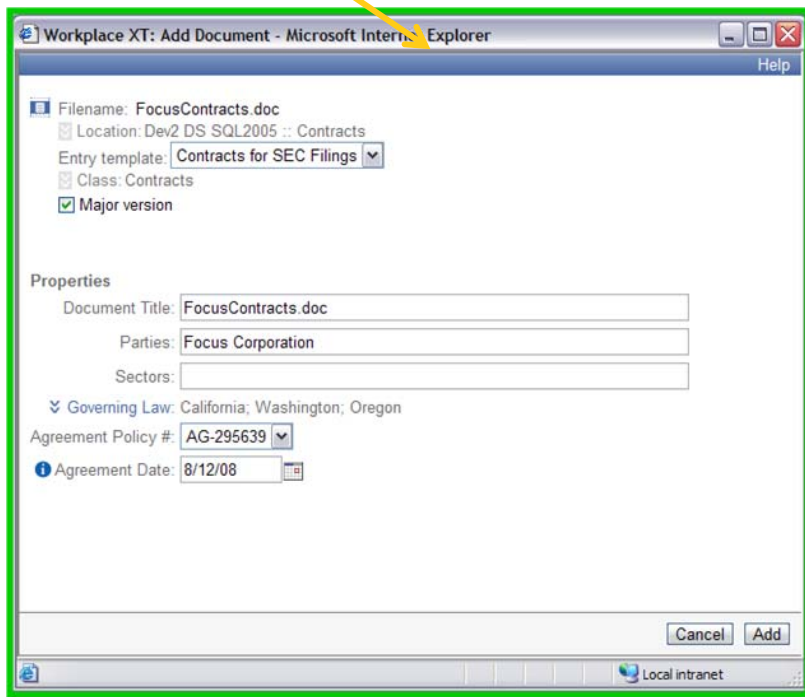
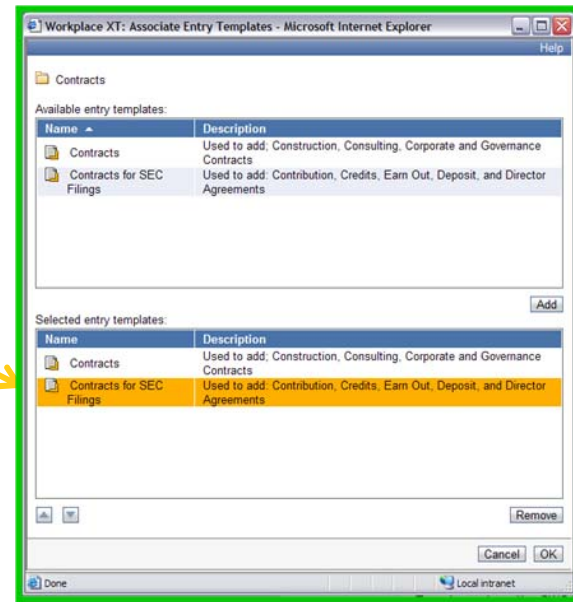
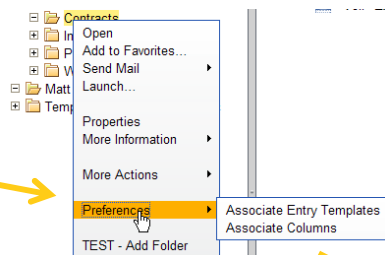
**Send Mail** – via native email clients (Outlook, Notes)



# What's New in Workplace XT 1.1.3

## Improved **entry template** features

- Folder/MIME type – entry template association
- Drag and Drop support
- New entry template wizard



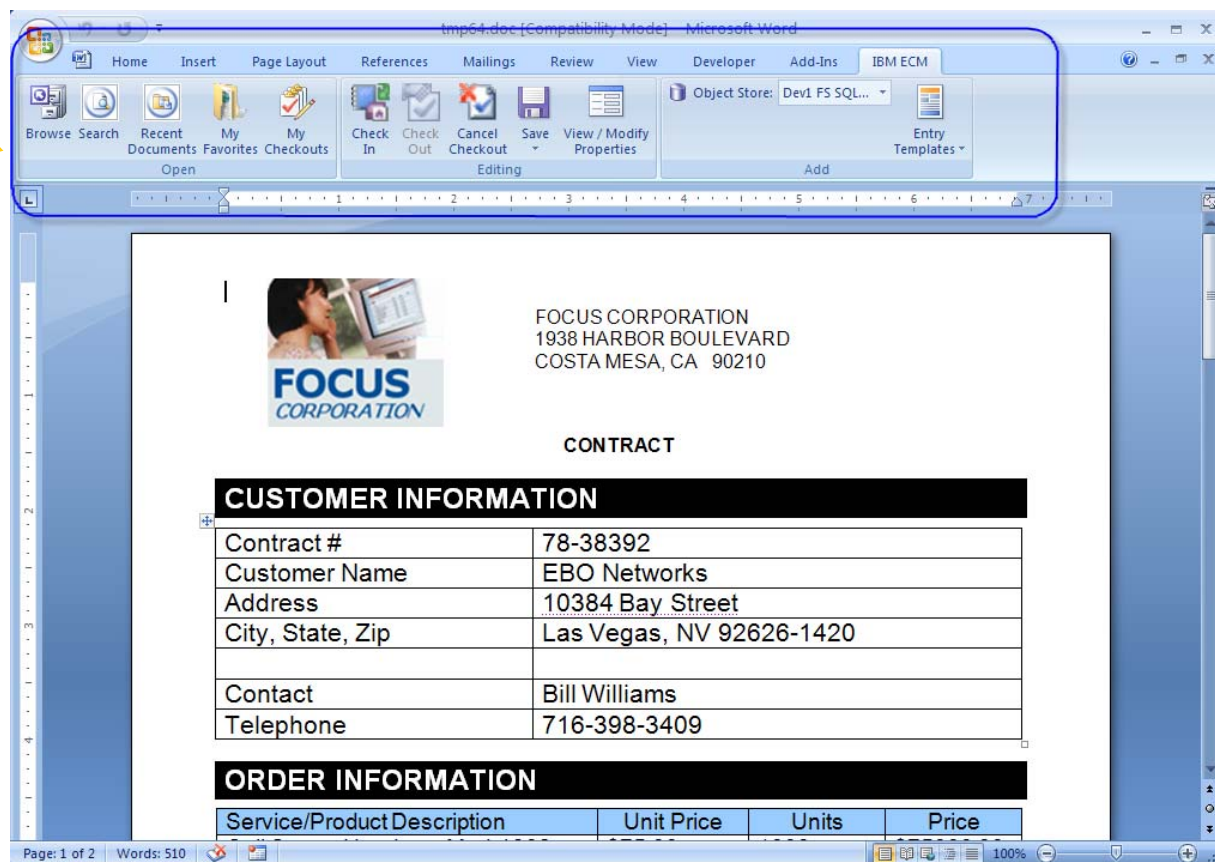
## *What is* Application Integration BCS ?

- Integration into MS Office and Outlook 2007
- Leverages the Microsoft 'Native' user interface
- Allows users to remain in applications that they spend the majority of their time while interacting with P8 services (Initial focus is on document management).
- Part of Workplace XT 1.1.3 release

# Application Integration BCS

## Leveraging the MS Ribbon Bar paradigm

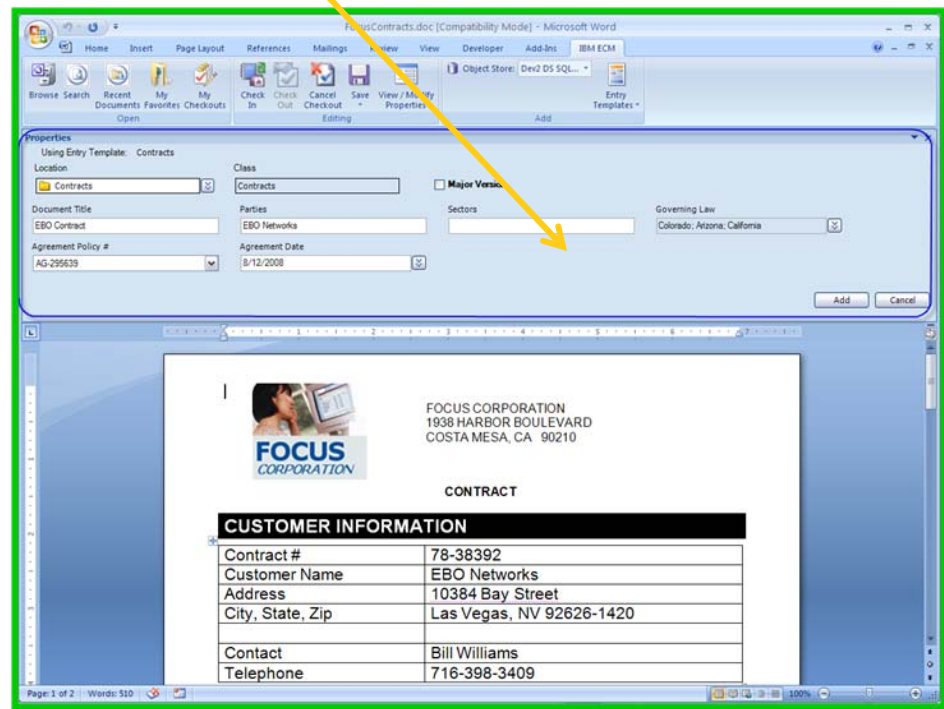
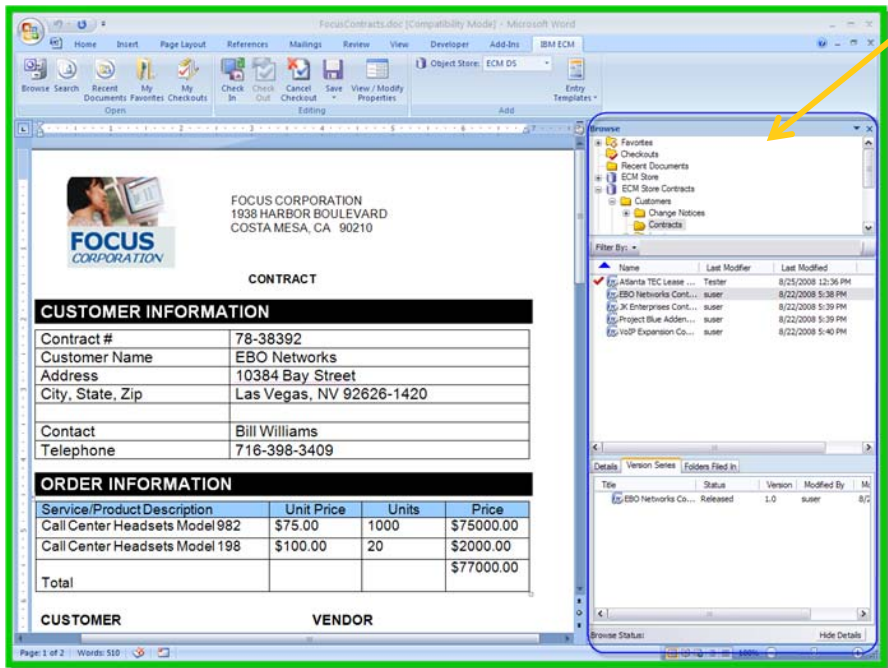
- Microsoft uses Ribbon Bars throughout Word, Excel, Power Point, and Outlook
- P8 uses the Ribbon Bar to expose ECM features



# Application Integration BCS

## Custom Task Panes

- In-place windows that present Microsoft functionality as well as ECM features





# Application Integration BCS

## Quick Access Toolbar

- Allows users to customize toolbar of ECM features

The screenshot shows a Microsoft Word window titled "FocusContracts.doc [Compatibility Mode] - Microsoft Word". The Quick Access Toolbar is visible in the top-left corner, containing icons for Save, Undo, and Redo. The document content includes a logo for Focus Corporation, contact information, a contract table, and an order table.

FOCUS CORPORATION  
1938 HARBOR BOULEVARD  
COSTA MESA, CA 90210

CONTRACT

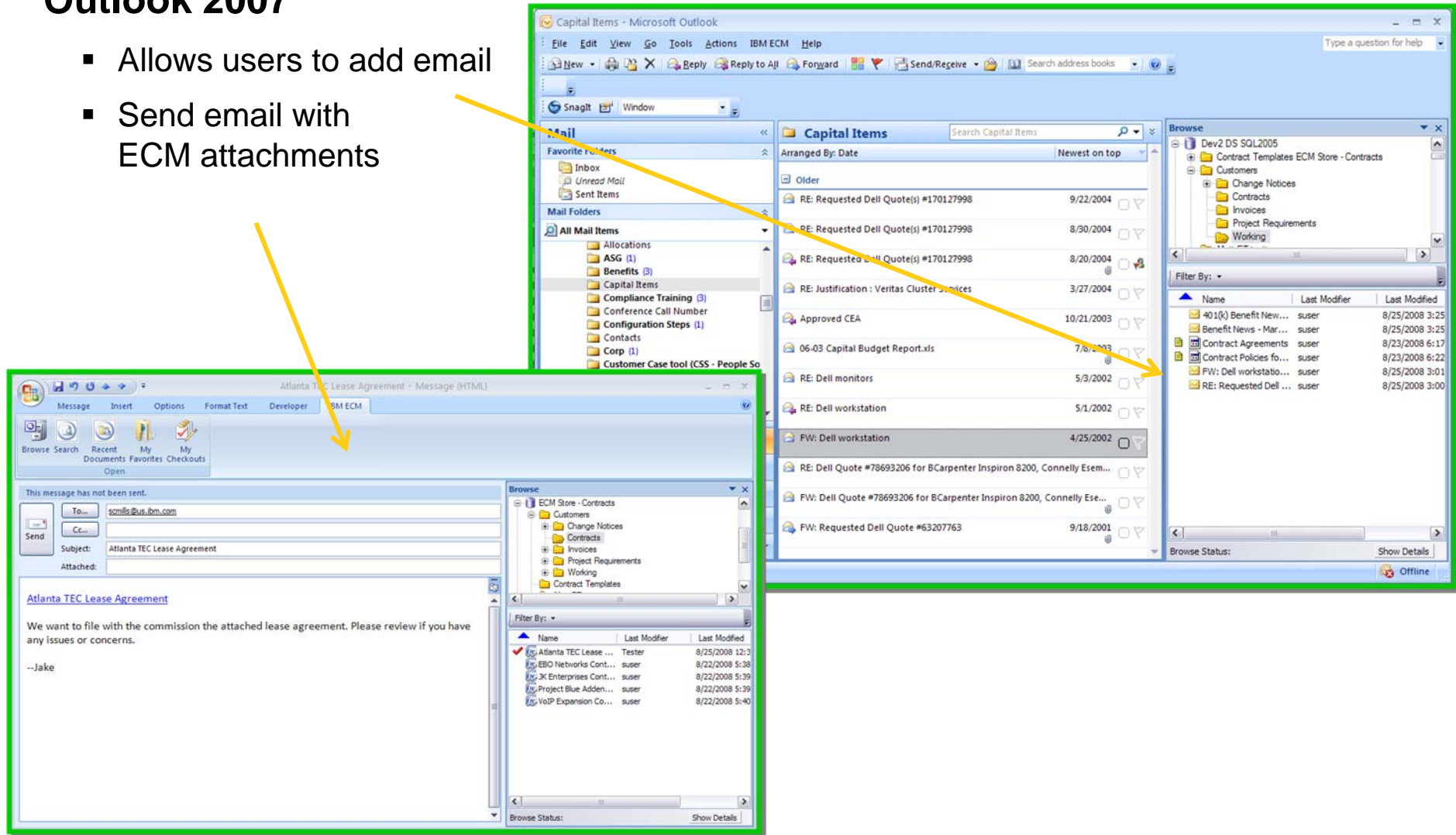
CUSTOMER INFORMATION	
Contract #	78-38392
Customer Name	EBO Networks
Address	10384 Bay Street
City, State, Zip	Las Vegas, NV 92626-1420
Contact	Bill Williams
Telephone	716-398-3409

ORDER INFORMATION			
Service/Product Description	Unit Price	Units	Price
Call Center Headsets Model 982	\$75.00	1000	\$75000.00
Call Center Headsets Model 198	\$100.00	20	\$2000.00
Total			\$77000.00

# Application Integration BCS

## Outlook 2007

- Allows users to add email
- Send email with ECM attachments



## Application Integration BCS (Initial Feature Set)

- Add documents via Entry Templates
- Add emails as .msg files
- Send email with ECM attachments (reference/copy)
- Check In/ Check Out/ Cancel Checkout
- Property updates
- Basic Search
- Recent Documents List
- Favorites
- Add Folders
- Workplace XT aware
- Preferences managed by FileNet Content Manager server
- Single Sign On – Kerberos

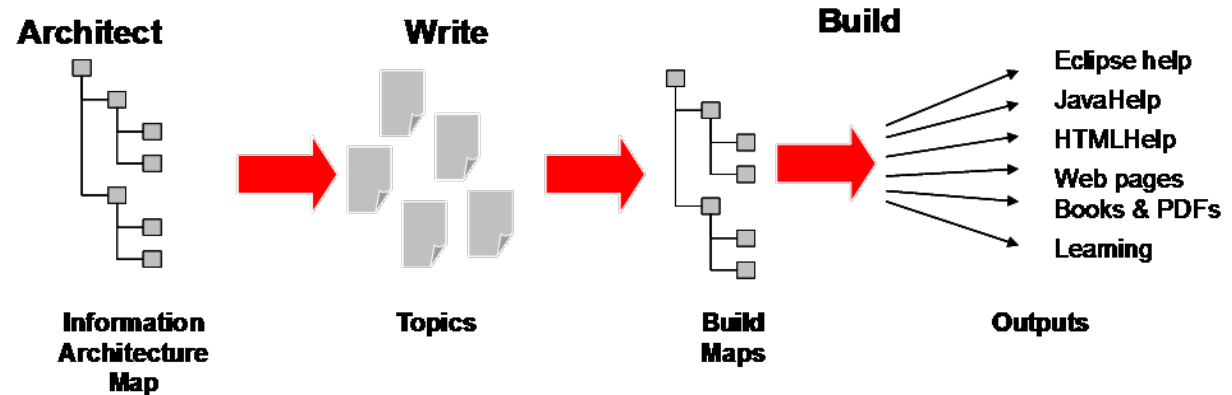
## *What is DITA ?*

- **Stands for** Darwin Information Typing Architecture
- **It's an OASIS standard** for designing, authoring, and publishing modular information - technical publications, help sets, or Web sites
- **It's a markup language:**  
topics for content, maps for collecting and publishing content
- **And it's an architecture:**  
specializing to create new types of topics and maps, with inheritance of existing processing
- Supported by an **open-source toolkit**, a **wide range of products**, and an **active community of users**



*In other words it's an XML standard for human readable text, documents, templates and content delivery*

## ... a bit more detail on DITA



### Structured content

- DITA topics, which can be specialized to support specific information types, for example DITA task
- Separates core content from metadata and links
- Metadata can be managed at topic level (content) or map level (collection)

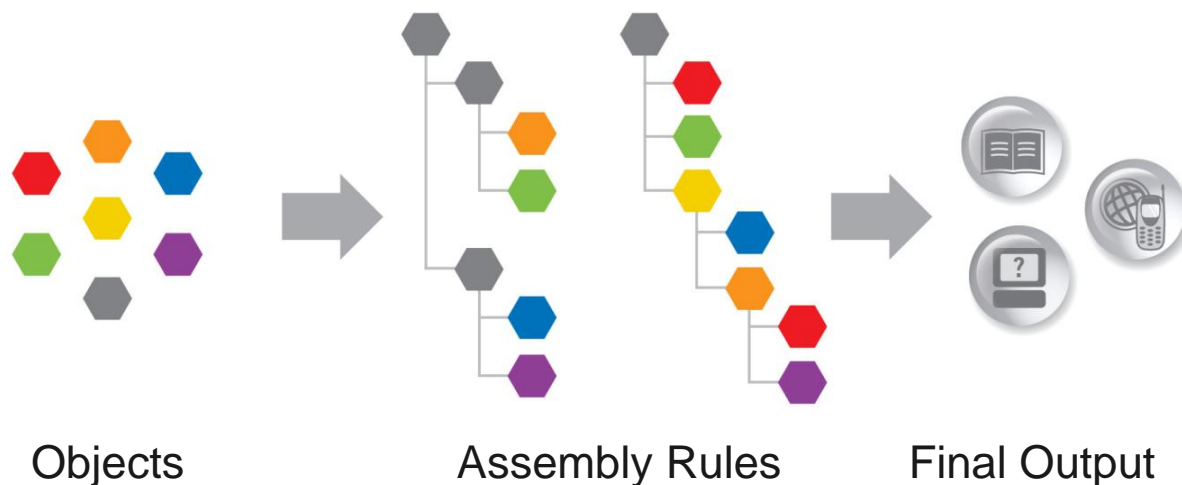
- Navigation
  - DITA maps manage relationships among topics
  - Tables of contents, site maps, related links...

<http://dita.xml.org/standard>

# DITA & Technical Publications: Use Cases

Building upon FileNet Content Manager Compound Document Framework

- Product documentation
- Training manuals
- Maintenance and Service manuals
- Standard Operating Procedures
- Policies
- E-learning
- Knowledge Base
- On-line Help
- Patent applications
- Legislation authoring
- ...



## What's changing in FileNet Content Manager?

- New Content Engine “addin” for an object store
  - Metadata model
  - DITA Classifier
- New rendering engine
  - Integration with DITA Open Toolkit (Open source)
- Documentation

## Customer Benefits:

- **Efficiently manage large publication projects**
  - Multiple participants owning sections and activities
  - *P8 CM provides independent review and approval cycles*
- **Single source editing for multiple output channels**
  - DITA\* standard transforms to many output formats
  - *Integration with authoring tools (Quark XA, Just Systems .. )*
  - *P8 CM will enhance rendering capabilities for DITA (PDF etc..)*
- **Share common sections with multiple publications**
  - Reduce maintenance/translation costs
  - *P8 provides link integrity management and security*

*\*Darwin Information Typing Architecture (OASIS standard)*



## Quark XML Author for IBM ECM



- Add-in to Microsoft® Word
- Lets Word users easily create XML documents
- Appropriate for casual users through power users

Feature	Benefit
Built on top of Microsoft Word	Easy user acceptance
Works seamlessly within Microsoft Word	Short learning curve
Continuously guarantees valid XML	Higher productivity
Supports advanced Word features such as spell check, thesaurus, track changes	Familiar functionality
Implemented in C# and .NET	High stability and performance
Microsoft partnership	Future proof

Welcome.xml - Microsoft Word

File Edit View Insert Format Tools Table Window Help


New...  
New DITA Component  
FileNet CMS  
Open... Ctrl+O  
Close  
Save Ctrl+S  
Save As... F12  
Export XML to Application  
Print Preview  
Print... Ctrl+P  
Send To  
Properties  
Exit

Empty

New From Online Template...  
Open From FileNet CMS  
Check Out  
Undo Check Out  
Save To FileNet CMS

Type a question for help

Welcome to the amazing digital image world of a DC digital camera by HyperCameras. The DC product line of digital cameras is the latest innovation in the digital camera industry. A DC camera does not provide access to camera functions through an multitude of antiquated buttons that are difficult to learn. Gone are buttons with cryptic little icons that you have to memorize the name of to have any hope of reading the manual. Instead, a DC camera provides access to almost all camera functions in a state-of-the-art software menu. This menu is displayed in the language of your choice. And similar to a software application on a PC, this camera comes with a fully integrated Help system. Just select the "?" button next to the menu command you are interested in and the Help for that command will be displayed.

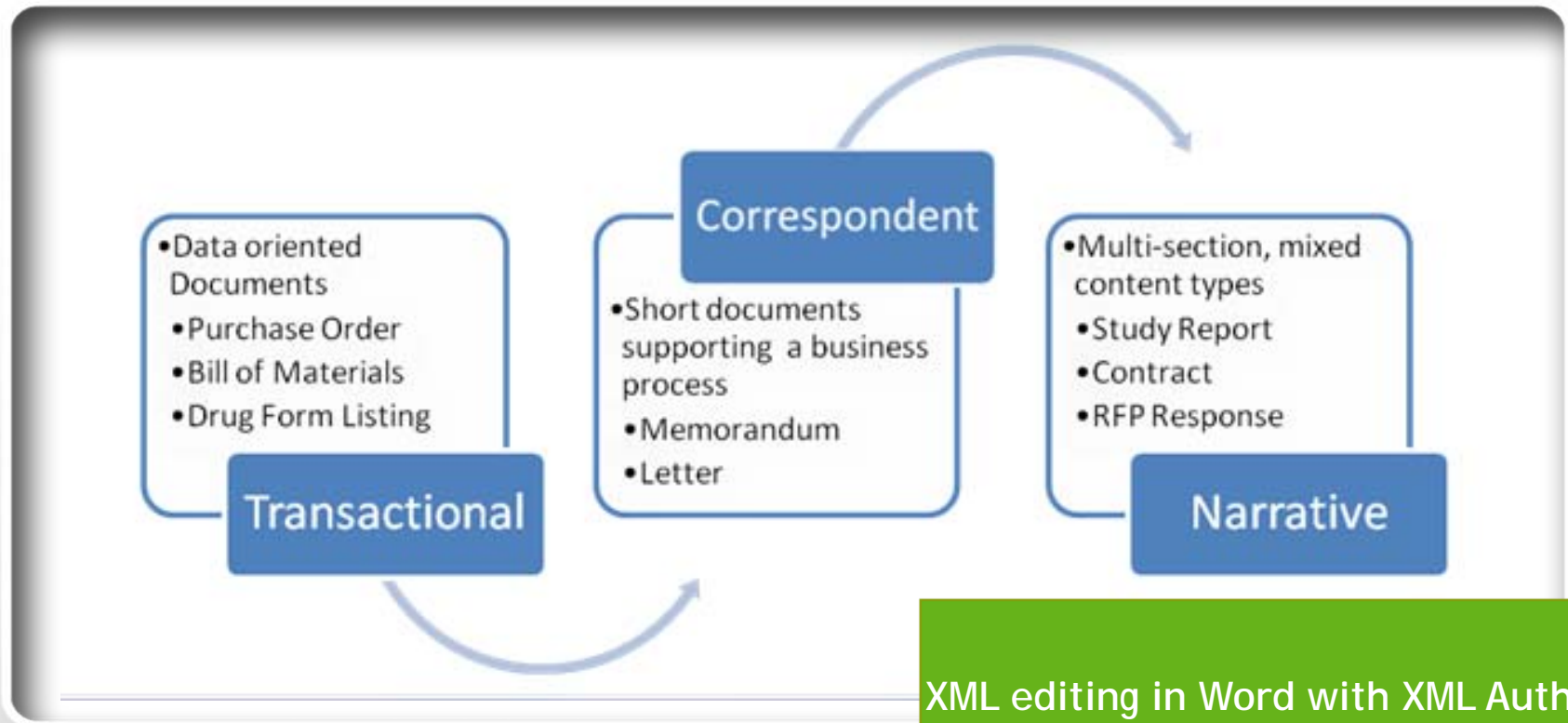


The staff of HyperCameras would like to thank you for purchasing your DC digital camera. Congratulations and happy shooting.

Copyright © 2008 Quark Mike was here

Page 1 Sec 1 1/1 At 1" Ln 1 Col 1 REC TRK EXT OVR

# XML Editing in Quark XML Author for Word



XML editing in Word with XML Author:  
simple, familiar, quick

# Bringing together the best of ECM and “smarter” Content Authoring & Dynamic Publishing to the masses of an Enterprise

The screenshot displays the IBM FileNet Workplace interface within a Microsoft Internet Explorer browser window. The interface is divided into several sections:

- Header:** IBM FileNet Workplace, admin | Tuesday, February 19, 2008. Navigation links: Help | Home | Preferences | Sign Out.
- Navigation Bar:** My Workplace | **Tasks** | Shortcuts | Browse | Search | My Search | Author | Admin
- Left Sidebar:**
  - My Workplace: My Browse Page
  - Tasks: My Inbox, Public Inboxes, My Active Workflows, Task Tracker
  - Shortcuts
  - Browse: Preview Two
  - Search
  - My Search
  - Author: General Tools, Advanced Tools
  - Admin
- Main Content Area:**
  - Path: **Inbox**
  - Items found: 4
  - Table of tasks:

Name ▲	Step Name	Status	Received On
Fixed Approval Workflow for CEA Request	Reviewers	In Progress	6/14/04 1:20 PM
Fixed Approval Workflow for Expense Form Policy	Approvers	In Progress	6/14/04 1:22 PM
Fixed Approval Workflow for Retire			
Fixed Approval Workflow for Retirement Policy			
- Bottom Panel:** Document Analysis.xml - Microsoft Word. The document content includes:
  - Introduction**
  - Text: "It is impossible to overstate the role that documents play in business. They initiate and record business change, clarify the interpretation of difficult concepts, present compelling rationale for action, and much more. Documents are such a pervasive part of business activity that the term "enterprise business documents" has to be clarified further to have any meaning."
  - Text: "To some extent, it is the work of the subcommittee itself that will fully define what is meant by an enterprise business document. However, as a starting place, we would offer the following high-level classification of business documents that will narrow our scope:"
  - Diagram:** A flow diagram showing three categories of documents:
    - Transactional:**
      - Data oriented Documents
      - Purchase Order
      - Bill of Materials
      - Drug Form Listing
    - Correspondent:**
      - Short documents supporting a business process
      - Memorandum
      - Letter
    - Narrative:**
      - Multi-section, mixed content types
      - Study Report
      - Contract
      - RFP Response

# Agenda

- Market Overview and Trends
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## P8 Content Manager Existing Capabilities

- Extensible object model
- Advanced metadata
- Document versioning
- Folders
- Compound documents
- Lifecycle management
- Searching
- Publishing
- Server events
- Security and auditing
- Content federation
- Document approval
- Enterprise site topology
- Geographical optimization
- Retention management
- System management

## What's New in Content Manager 4.5?

- Content Engine Enhancements
  - DITA support
  - Content Search Engine High Availability
  - Content Engine Web Services enhancements
- Consumability
  - Install and Upgrade
  - Systems Deployment
- Platform Interoperability and Availability
- Globalization enhancements

## Content Engine Enhancements (Cont'd)

- Content Search Engine (CSE) high-available improvements
- Web Services enhancements
  - New Content Engine 4.0 WSDL
  - MTOM (Message Transmission Optimization Mechanism) support
  - New Operations
    - Get Content



# Highlighting Changes: FileNet CM 3.5 to 4.0 to 4.5

## 4.0

Feature	Benefit
<ul style="list-style-type: none"> <li>• <b>Compound documents</b></li> <li>• Enhanced distributed caching</li> <li>• API to support improved search and folder browsing performance</li> <li>• CFS-IS – Annotation support</li> <li>• <b>.Net API</b></li> <li>• <b>Java EE based platform</b></li> <li>• Scaling and HA through server farming</li> </ul>	<ul style="list-style-type: none"> <li>• Ability to manage components and overall structure of complex documents such as engineering diagrams</li> <li>• Enabling faster content retrieval for geographically distributed deployments</li> <li>• <b>Ability to develop .Net applications using a native API</b></li> <li>• Increase deployment options</li> <li>• Improved scaling and high availability options</li> <li>• <b>Broad operating system platform support</b></li> </ul>
<ul style="list-style-type: none"> <li>• Security Inheritance Enhancements</li> <li>• Rendition Engine High Availability options</li> </ul>	<ul style="list-style-type: none"> <li>• Improvement of manageability of inherited security</li> <li>• Improvement of uptime for rendering services by providing options to run in a high availability configuration</li> </ul>
<ul style="list-style-type: none"> <li>• <b>Compound Object Model for DITA</b> (Darwin Information Typing Architecture)</li> <li>• Publishing Engine for DITA documents Defined class and relationship model</li> <li>• Leverages DITA Open Toolkit</li> <li>• Delivered as object store “add-in”</li> <li>• Transform/Render to multiple output formats</li> <li>• Server based processing</li> </ul>	<ul style="list-style-type: none"> <li>• DITA is a powerful document standard which defines large publications as a set of small, self-contained topics that can be reused in multiple deliverables.</li> <li>• Enabling P8 Content Manager for DITA publications provides manageability and control over the publication process while maintaining its benefits. This allows multiple participants to work on the publication while maintaining its integrity and progress to completion.</li> </ul>

## 4.1

## 4.5

## OS, Application Servers, databases ..

- **Supported Operating Systems**
  - Windows, AIX, Solaris , HP-UX
- **Supported Application Servers**
  - IBM Websphere
  - BEA WebLogic
  - JBoss (New with 4.0.1)
- **Supported databases**
  - IBM DB2
  - Oracle
  - Microsoft SQL Server
- **Supported directory services**
  - IBM Directory
  - Sun One Directory
  - Active Directory + Multi-Forest
  - Novell eDirectory

## Platform Interoperability and Availability

- **What's new in Content Manager 4.5?**
  - Operating Systems
    - zLinux for AE and CE, Windows 2008
  - Application Servers
    - WebSphere 7, WebLogic 10
  - Database Servers
    - DB2 9.1 for z/OS, Oracle 11g
  - LDAP Servers
    - MS AD & AD LDS 2008, eDirectory 8.8, Sun JDS 6.3

## Consumability

- **Installation and Upgrade**
  - Staging upgrades by component set
  - Version skipping
  - Disconnect install from configuration (CE initially)
  - Silent upgrades (in addition to current silent install support)
- **Systems Deployment**
  - Deployment Manager Tool (New in 4.5) for mapping and conversion
  - Export/Import enhancements
- **Product Documentation Improvements**
- **Globalization enhancements**

- Configure JDBC Data Sources
- Configure LDAP
- Configure Bootstrap Properties
- Deploy Application

**Provide Configuration Properties** 2 warnings detected

JDBC driver name:*	<input type="text" value="Oracle JDBC Driver (RAC support)"/>
JDBC data source name:*	<input type="text" value="FNGCDDS"/>
JDBC XA data source name:*	<input type="text" value="FNGCDDXSA"/>
Database server name RAC node 1:*	<input type="text"/>
Database port number RAC node 1:*	<input type="text"/>
Database server name RAC node 2:*	<input type="text"/>
Database port number RAC node 2:*	<input type="text"/>
Database service name:*	<input type="text"/>
Oracle RAC retries:*	<input type="text" value="32"/>
Oracle RAC delay:*	<input type="text" value="4"/>
Database user name:*	<input type="text"/>
Database password:*	<input type="password"/> <input type="password" value="Confirm"/>
Script:*	<input type="text" value="/opt/FileNet/ContentEngine/tools/configure/scripts/configureWSJDBC.tcl"/> <input type="button" value="Browse..."/>
Temporary directory:*	<input type="text" value="/opt/FileNet/ContentEngine/tools/configure/tmp"/> <input type="button" value="Browse..."/>
	<input checked="" type="checkbox"/> Task enabled

\*denotes a required field

No consoles to display at this time.



- Environments
  - Cyclops
  - env 1
  - env 2
  - hq-hawaii
    - Object Store Data
    - Security Principal Data
  - test
  - test2
  - Tigh
- Source-Destination Pairs
  - From Tigh to Hawaii
    - Object Store Map
    - Security Principal Map
  - pair 1

## Overview

File Path: D:\P8DeploymentDataIOD\Environments\hq-hawaii\EnvironmentConfig.xml

## Description:

Test environment hq-hawaii

## Half Maps:

Object Store Data: 2 Object Stores, 1 labels, updated Oct 15, 2008 [Retrieve Data](#)Security Principal Data: 29 Principals, 9 labels, updated Sep 1, 2008 [Retrieve Data](#)

## Message Console

```
INFO [main] common.ConsoleThread - Logging system initialized
```

## Platform Interoperability and Availability

- SSO for P8 4.5
  - Kerberos support based on SPNEGO for Workplace, AppInt, Workplace XT, and Office 2007 integration
  - SiteMinder for WebLogic 9

## Expanding the value of FileNet CM 1/2

- **Websphere Application Server 6.1 Base Edition**
  - Limited use license included with every FileNet Content Manager 4.5 license
  - Limited to be used in combination with FileNet Content Manager only
  - No limitation on number of servers, users, etc
- **DB2 Workgroup Server Edition 9.5**
  - Limited use license included with every FileNet Content Manager 4.5 license
  - Limited to be used in combination with FileNet Content Manager only and must be installed on same server
  - No limitation on number of servers, users, etc



## Expanding the value of FileNet CM 2/2

### Content Federation Server (CFS)

- CFS is now a feature of FileNet Content Manager 4.5: full license is included with every FileNet Content Manager 4.5 license
- Including: CFS-IS, CFS-CS, CFS-IICE
- IBM ECM repositories are included in the license.
  - IBM FileNet Content Services
  - IBM FileNet Image Services
  - IBM FileNet Content Manager
  - IBM Content Manager Version 8
  - IBM CM OnDemand
- Non IBM ECM repositories (e.g. Open Text, EMC, ...) require separate purchase of connector

# Delivering a broad reach for your ECM investment

- Scale to meet enterprise needs
  - Proven horizontal and vertical scalability
  - Geographical optimization
- Providing in-context capabilities to your employees
  - Workplace XT
  - Lotus Quickr connectors
  - Deep Office integration
- Enriching the platform
  - Advanced Document Management
  - Rich API and tools for customers and partner solutions
  - IBM Classification Module
  - Digital Asset Management
  - ...

# Questions

