

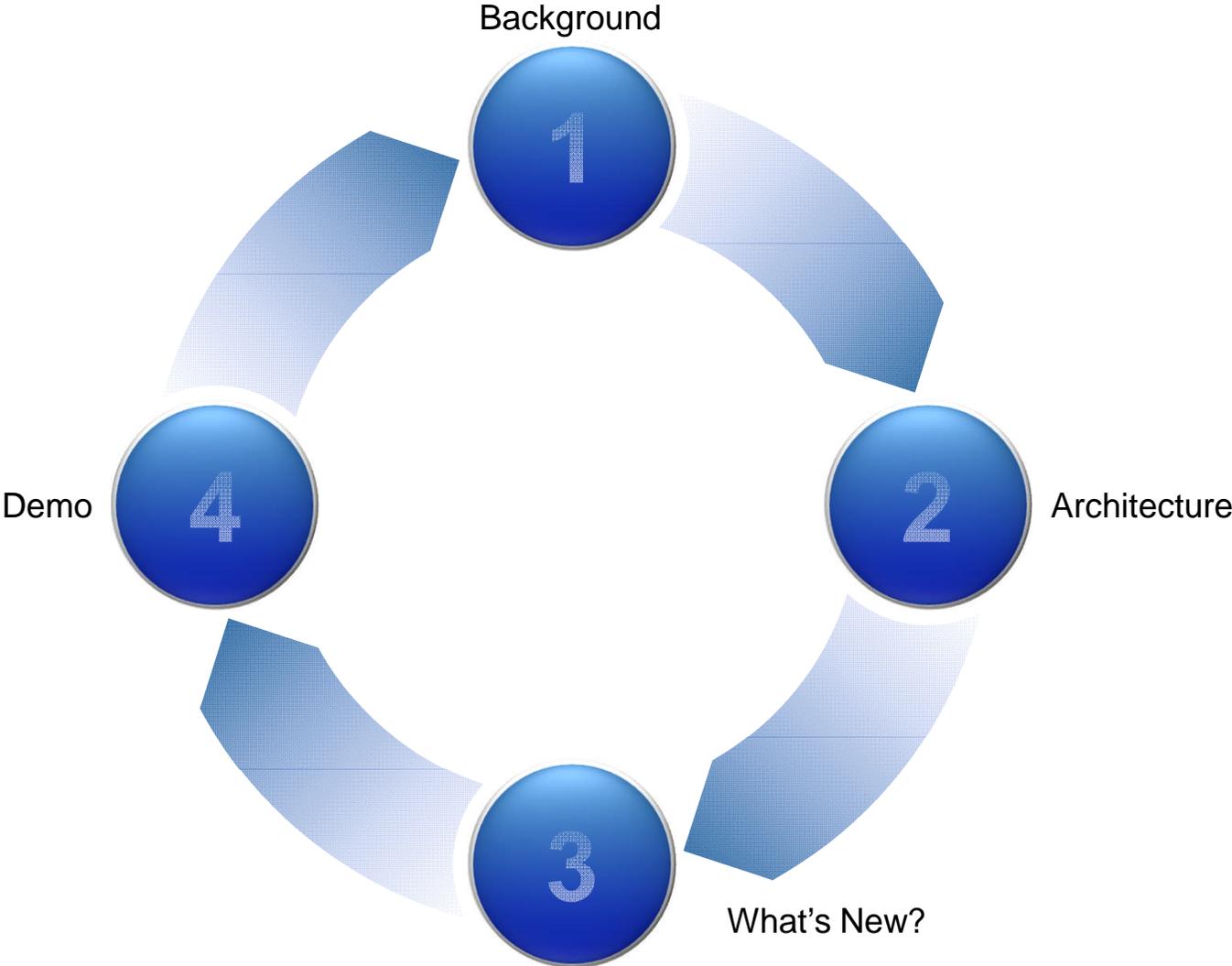
IBM Enterprise Content Management Platform

**Susan Noonan, North America
Mid-Atlantic Technical Sales Specialist**





ICC for SharePoint



Background



Collaboration and ECM

- SharePoint
 - Enhances team productivity through collaboration
 - Consistent user experience
 - Reduces training costs
- FileNet P8
 - Discipline and controls (e.g. retention and compliance)
 - Business process management
 - Central management (e.g. archival and backup)
 - Scalability



Use Cases for Integrated BCS/ECM

- Archival – keep SharePoint humming
- Assets only in the trusted vault
 - Not all documents are assets
 - Assets are sensitive
- Compliance
- Business process management
- Information reuse
- User-experience

Background



Streamline and
Extend

ICC for SharePoint



Background



Architecture

Web Parts Connector, What is it?

- ❑ Collection of Web Parts which allow end users to interact with documents in FileNet P8 directly from the SharePoint
- ❑ Merges basic document management capabilities with Microsoft user experience
- ❑ Real-time access of P8 content from SharePoint

ICC for SharePoint, What is it?

- ❑ SharePoint initial content authoring environment, & content ultimately swept into & accessed from P8
- ❑ Provides SharePoint basic content services and collaboration, but customers need a secure and centrally managed repository
- ❑ Provide a seamless and automated way for content to transition into an ECM repository

Capabilities:

- ❑ SharePoint-created content move into & managed by the ECM repository; and deleted from SharePoint
- ❑ Move and Retain Link (“stubbing”)
- ❑ Retention of created-by, modified-by metadata
- ❑ “Sweeping” of pre-existing SharePoint site content
- ❑ Automatic SharePoint child site discovery
- ❑ Central Configuration Utility with common repository
- ❑ Remote Deployment
- ❑ Records Management support

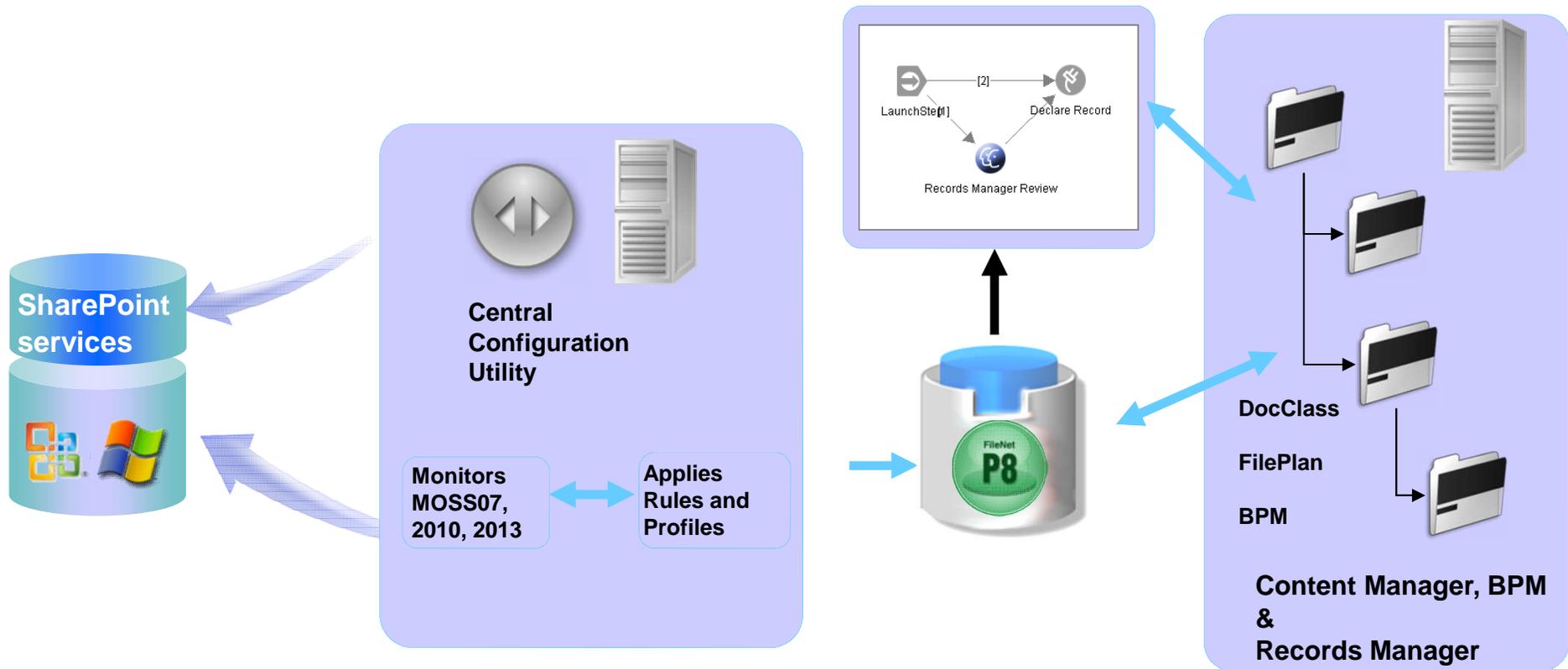
Supports:

- WSS 3.0, MOSS 2007, SharePoint 2010, 2013
- IBM FileNet P8 5.x



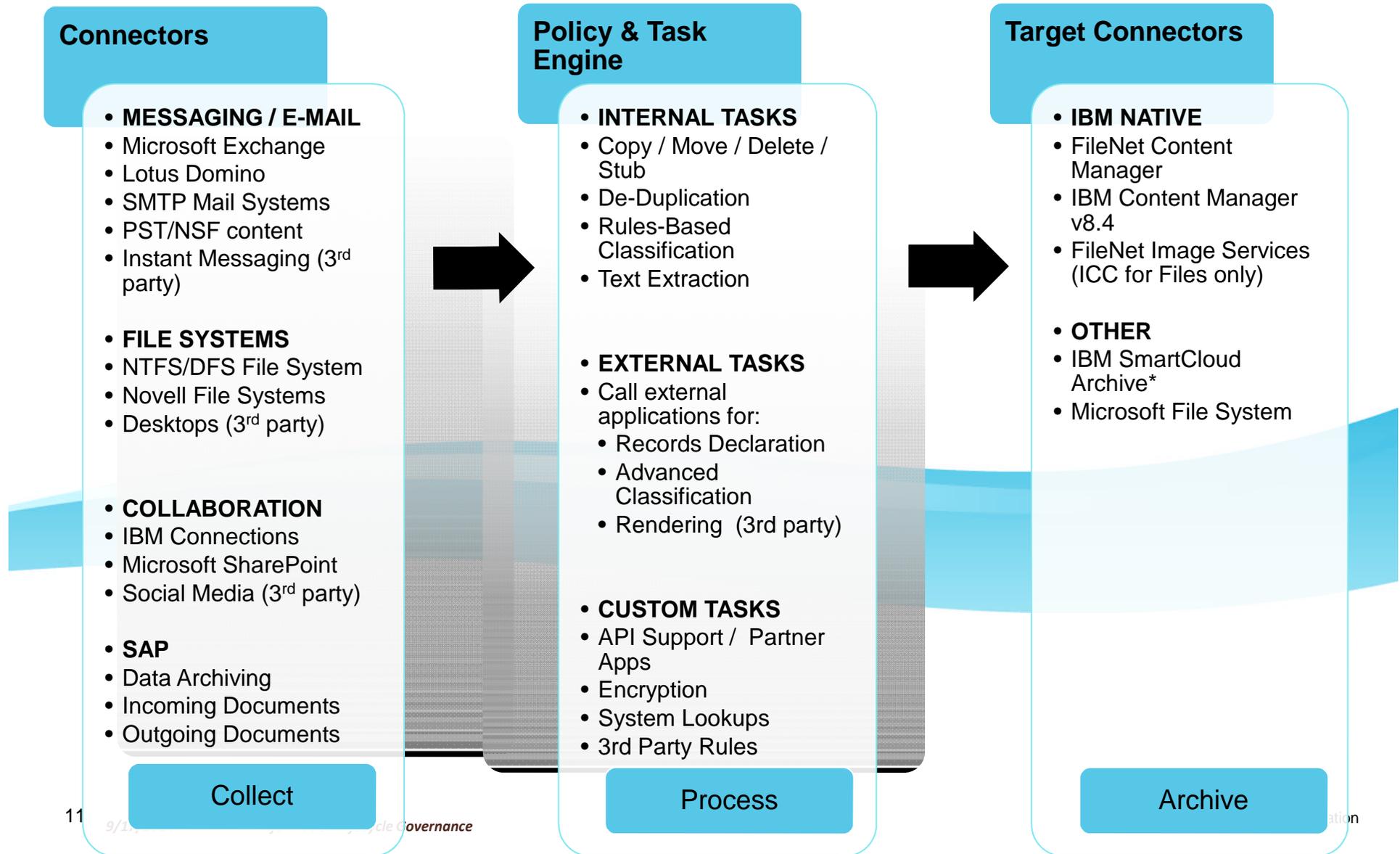
SharePoint Integration

Delivering ECM to all Information Workers

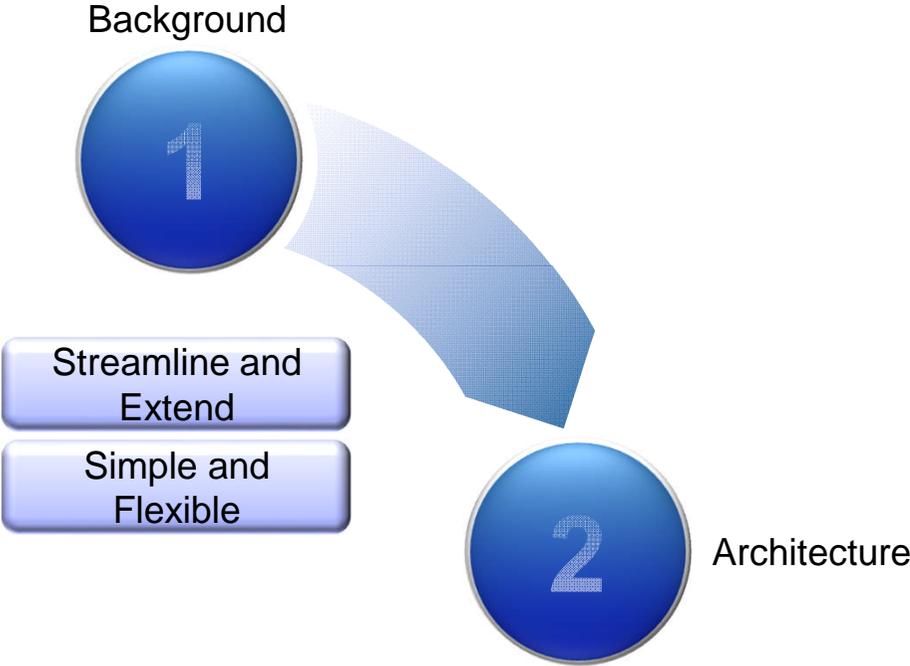


Collect, Process and Archive

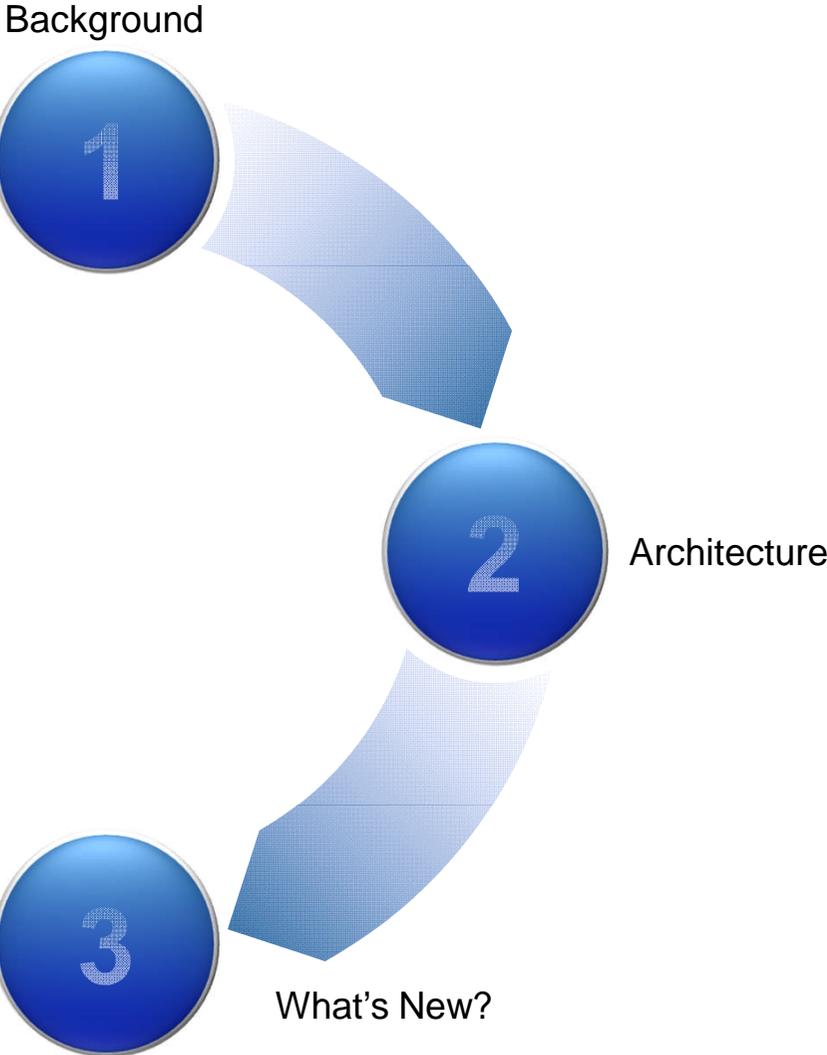
Across multiple sources and targets



ICC for SharePoint



ICC for SharePoint



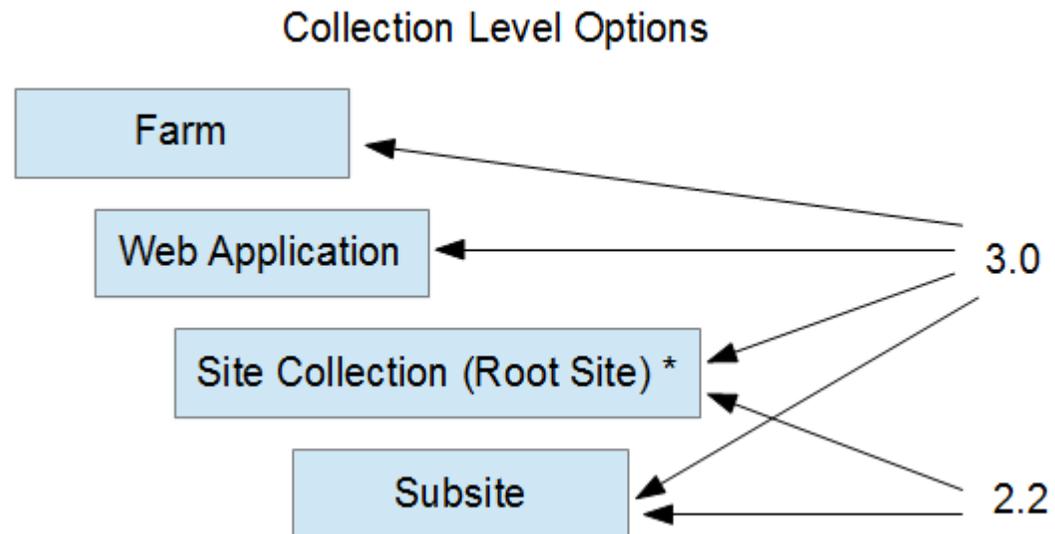
What's new for SharePoint in ICC latest releases?

- Collection levels and depth
- Library or list type filtering
- User filtering
- Column support enhancement
- Icon Mirroring
- Re-collection enhancements

Broad collection capabilities



- Collection Level



*Depth counting starts here for web application and farm collection levels.

List Support



- All list items (other than documents) are captured as HTML.
- Common list items such as Tasks, Announcement, and Contacts are captured to show the information in the same fashion as the properties view for that item in SharePoint.

Below is an example of an Announcement item as it looks in SharePoint

Title	This is an Announcement
Body	This is an Announcement This is an Announcement <u><i>This is an Announcement</i></u> <ul style="list-style-type: none">• <u>one</u>• <u>two</u>• <u>three</u> <p style="text-align: right;"><u>This is right justified.</u></p>
Expires	5/1/2012

Content Type: Announcement
Created at 4/18/2012 11:39 AM by System Account
Last modified at 4/18/2012 11:39 AM by System Account

The image below shows the same announcement item from P8 after it has been collected.

Title	This is an Announcement
Body	This is an Announcement This is an Announcement <u><i>This is an Announcement</i></u> <ul style="list-style-type: none">• <u>one</u>• <u>two</u>• <u>three</u> <p style="text-align: right;"><u>This is right justified.</u></p>
Expires	05/01/2012

Content Type: Announcement
Version: 1.0
Created at 2012-04-18T17:39Z by System Account (SHAREPOINT\system)
Last modified at 2012-04-18T17:39Z by System Account (SHAREPOINT\system)

“Look & Feel” Maintained on Archived Content

Non-binary content stored as HTML renderings

Displayed in “high fidelity”

Original “Discussion” in SharePoint

Started: 2012-04-19T00:07Z by System Account (SHAREPOINT\system)

Post photos of your systems/rooms here! (Part 9)
Share photos of your systems/rooms in the discussion thread.

Posted: 2012-04-19T00:09Z by System Account (SHAREPOINT\system)

Some serious rigs going on in this thread. I'd thought I'd share my work in progress.

From: System Account
Posted: 4/18/2012 12:07 PM
Subject: Post photos of your systems/rooms here! (Part 9)

Share photos of your systems/rooms in the discussion thread.

Posted: 2012-04-19T00:10Z by System Account (SHAREPOINT\system)

Very nice. Clean. Refined.

As Archived by ICC; Rendered in browser

Threading

Started: 4/18/2012 12:07 PM by System Account

Post photos of your systems/rooms here! (Part 9)
Share photos of your systems/rooms in the discussion thread.

Posted: 4/18/2012 12:09 PM by System Account

Some serious rigs going on in this thread. I'd thought I'd share my work in progress.

[Show Quoted Messages](#)

Posted: 4/18/2012 12:10 PM by System Account

Very nice. Clean. Refined.

[Show Quoted Messages](#)

Filtering - Users



The filter will check all versions of a SharePoint item. For example, if you have an item that was created by Bach and then modified by Beethoven and then further modified by Brahms, any one of these names in the filter will have the SharePoint collector pick up this item.

You can select to have the user list retrieved for auto-suggest functionality.

Created or modified by users ⓘ

Suggest existing users

Add user: ⓘ

b|

Brent Benton

Selected users: ⓘ

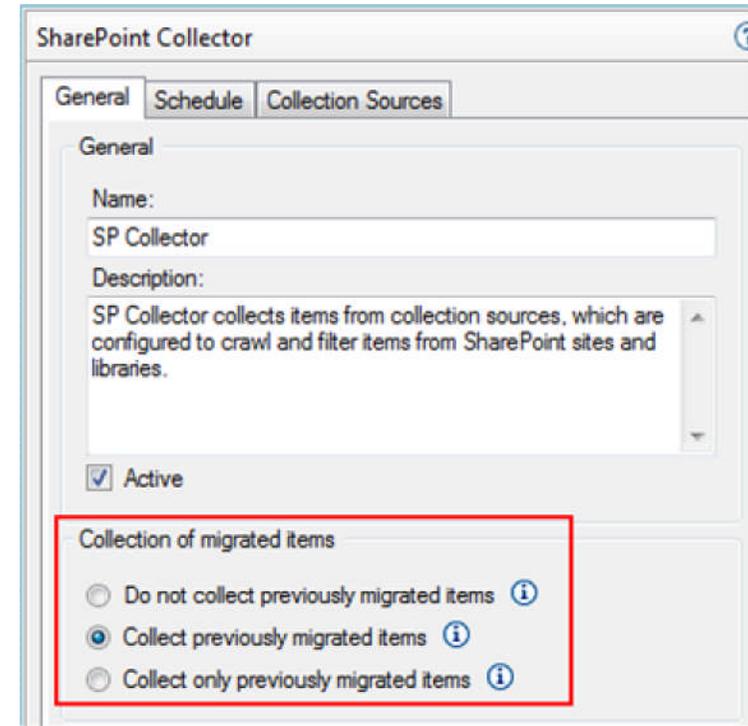
Remove

Re-collection Enhancements

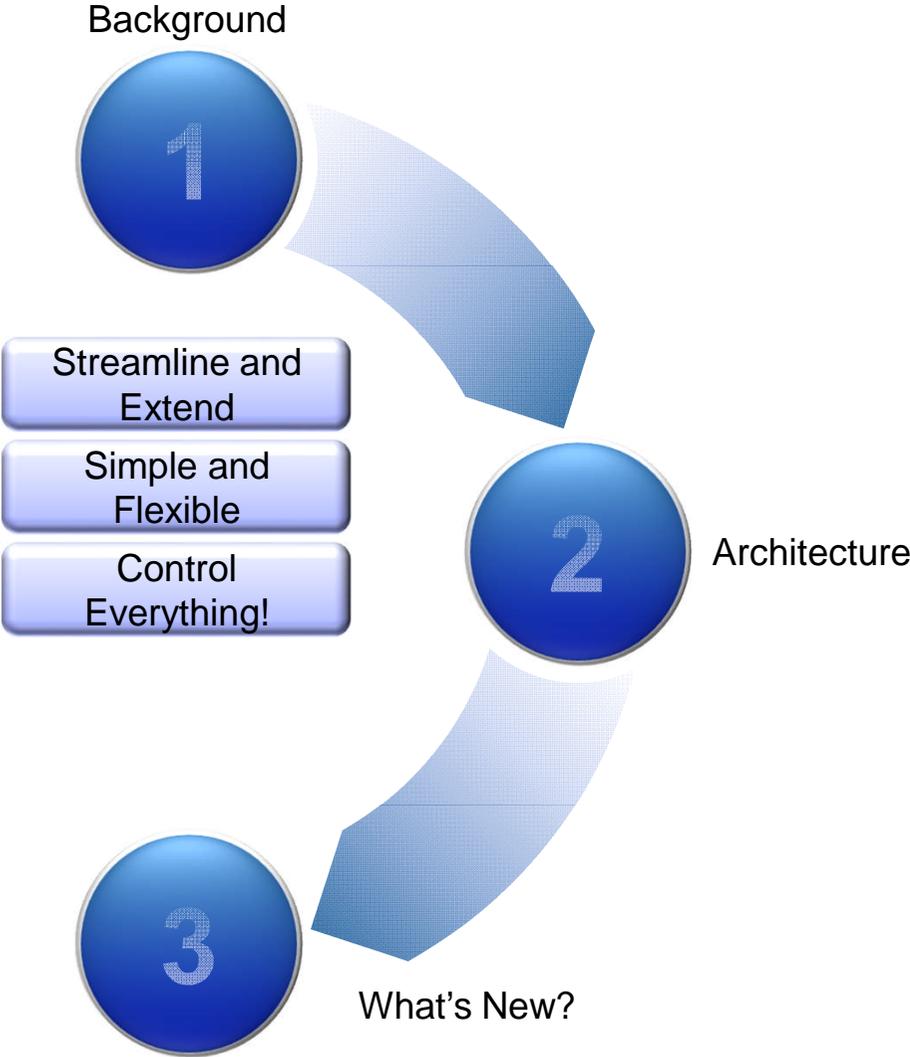
Identify and collect

Options for archiving and re-collection of restored items

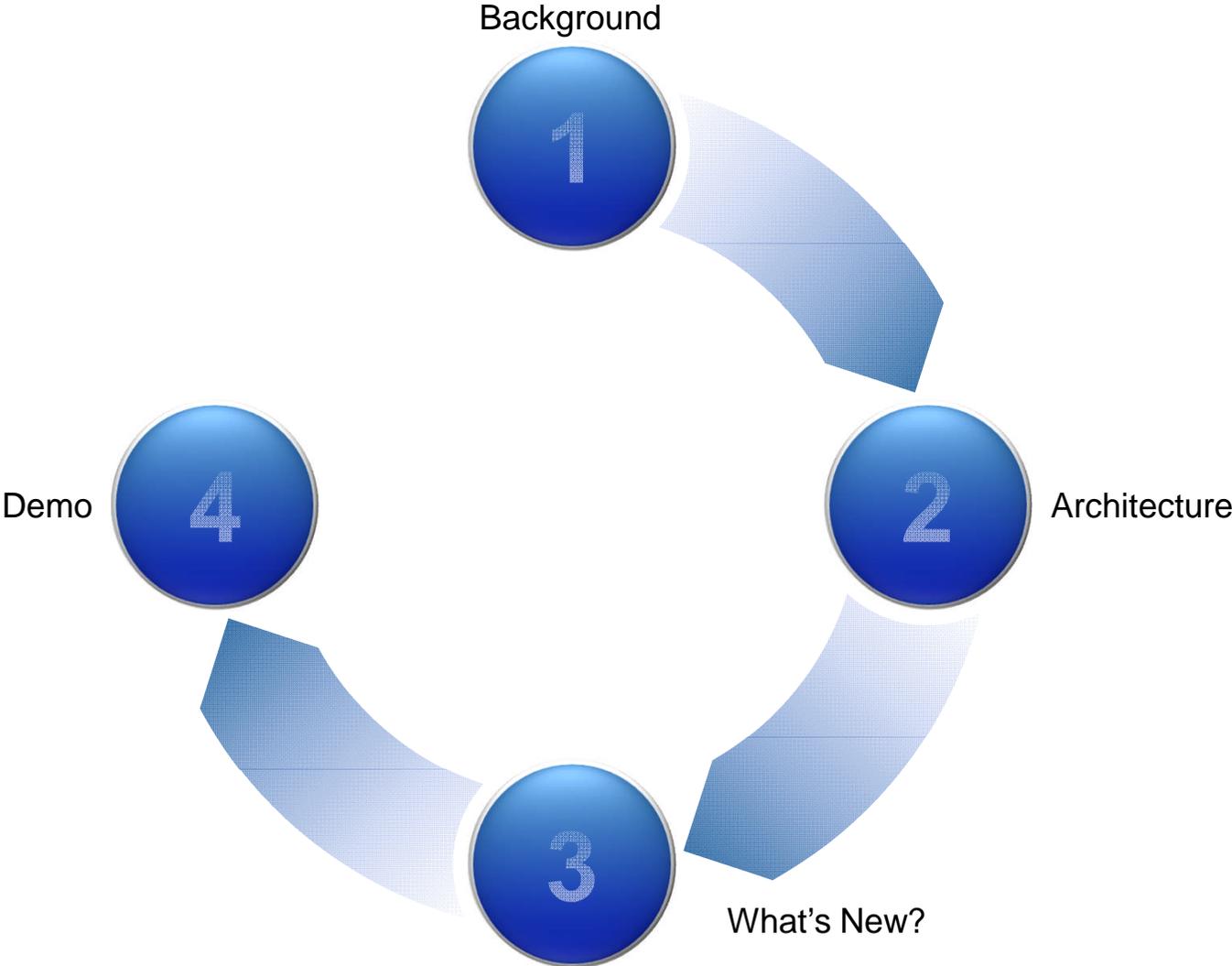
Cleanup links in SharePoint when content deleted from the repository

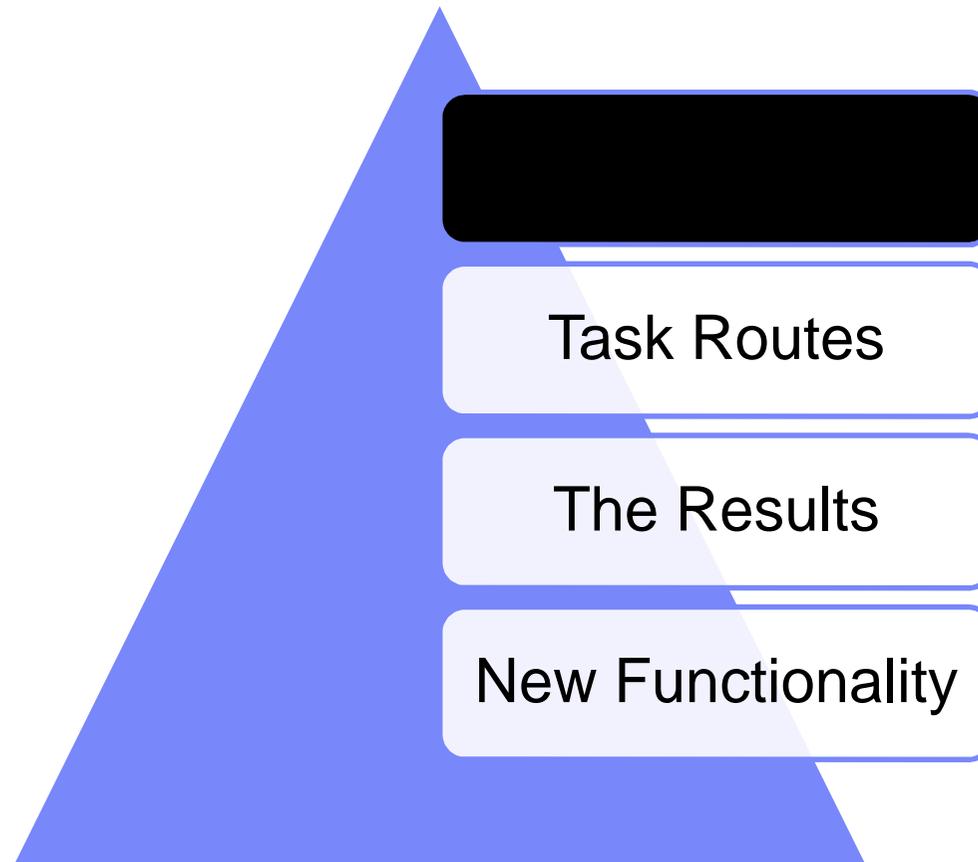


ICC for SharePoint

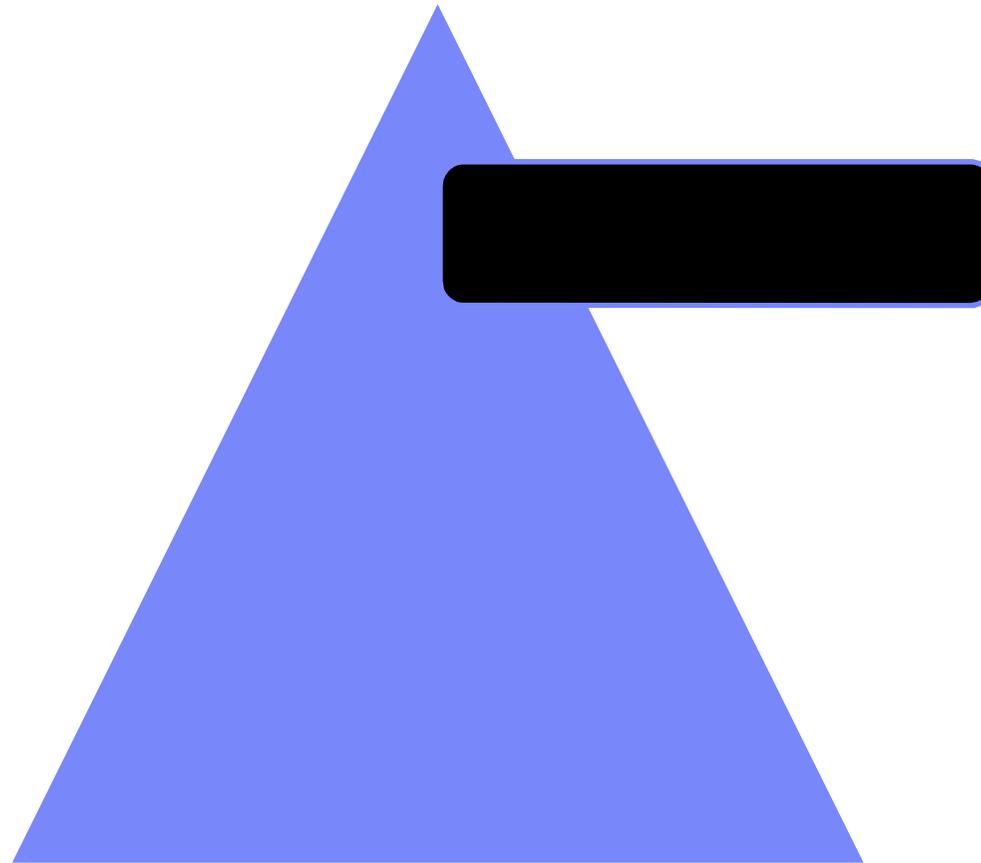


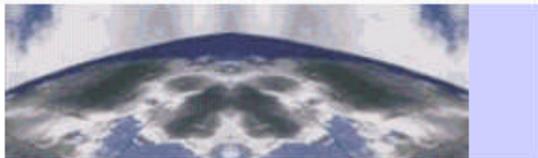
ICC for SharePoint





ICC for SharePoint demo





Contract Processing Home



Home

Search this site...

Libraries

- Site Pages
- Shared Documents
- Services Contracts
- Purchase Contracts

Lists

- Calendar
- Tasks

Discussions

- Team Discussion

P8 Archive

- P8 Browse
- P8 Search
- P8 Inbox
- P8 Public Queues
- P8 User Administration

Welcome to the Contracts Processing Site

This site will be used to review, approve, and store contract documents. Use of this site is restricted to the Contracts Department. Approved and fully executed contracts will be stored in the IBM P8 central archive.

IBM FileNet Personal Inbox

Logged in as: administrator View: All Documents

Inbox

Name	Step Name	Status	Received On
final approval	Approval step	In Progress	8/29/2011 5:23:28 PM
Physical Records Management	Approve	In Progress	10/31/2011 2:55:07 PM

IBM FileNet Public Inbox

Logged in as: administrator View: All Documents

Public Inboxes

- AC_Adjuster
- AC_AdministrativeClerk
- AC_Agent
- CCDM_CustomerServiceRepresentative
- CCDM_DataClerk
- ContractClerk
- PhysicalEntitiesDeliveryQueue



Getting Started

- Share this site
- Change site theme
- Set a site icon
- Customize the Quick Launch

Type	Name	Contract Amount	Vendor Name	State/Province	Status
Folder	Expiring Contracts				
Folder	Incoming Contracts				
Document	ABC-010001	\$45,000.00	ABC Services	Oregon	Final
Document	ABC-010002	\$55,000.00	ABC Services	Oregon	Final
Document	ACE-020001	\$23,000.00	ACE Corp	Iowa	Final
Document	FXM-020002	\$74,000.00	FXM Corp	Nebraska	Final
Document	FXM-030001	\$83,000.00	FXM Corp	Nebraska	Final
Document	IBM-030002	\$67,000.00	IBM	New York	Published
Document	IBM-030003	\$87,000.00	IBM	New York	Published
Document	IBM-090001	\$34,000.00	IBM	New York	Published
Document	LAL-040001	\$89,000.00	Larson and Larson	Kansas	Final
Document	LAL-040002	\$28,000.00	Larson and Larson	Kansas	Final
Document	PAE-040003	\$49,000.00	Palo Engineering	So Dakota	Final

- Site Actions
- Libraries
- Site Pages
- Shared Documents
- Services Contracts
- Purchase Contracts
- Lists
- Calendar
- Tasks
- Discussions
- Team Discussion
- P8 Archive
- P8 Browse
- P8 Search
- P8 Inbox
- P8 Public Queues
- P8 User Administration
- Recycle Bin
- All Site Content

+ Add document

Approved Services Contracts

New Document New Folder

Logged in as: administrator View: All Documents

Type	Name	Content Size	Date Last Modified	Last Modifier
Refresh				Logged in as: administrator

Type	Name	Date Last Modified	Last Modifier
Physical Record Management	Physical Record Management	10/31/2011 2:42 PM	Administrator

Type	Name	Contract Amount	Vendor Name	State/Province	Status
Folder	Expiring Contracts				
Folder	Incoming Contracts				
Document	ABC-010001	\$45,000.00	ABC Services	Oregon	Final
Document		\$55,000.00	ABC Services	Oregon	Final
Document		\$23,000.00	ACE Corp	Iowa	Final
Document		\$74,000.00	FXM Corp	Nebraska	Loading Final
Document		\$83,000.00	FXM Corp	Nebraska	Final
Document		\$67,000.00	IBM	New York	Published
Document		\$87,000.00	IBM	New York	Published
Document		\$34,000.00	IBM	New York	Published
Document		\$89,000.00	Larson and Larson	Kansas	Final
Document		\$28,000.00	Larson and Larson	Kansas	Final
Document	PAE-040003	\$49,000.00	Palo Engineering	So Dakota	Final

- View Properties
- Edit Properties
- Edit in Microsoft Word
- Check Out
- Version History
- Send To
- Compliance Details
- Manage Permissions
- Delete

+ Add document

Approved Services Contracts

New Document New Folder Logged in as: administrator View: All Documents

Type	Name	Content Size	Date Last Modified	Last Modifier
------	------	--------------	--------------------	---------------

Refresh Logged in as: administrator

Type	Name	Date Last Modified	Last Modifier
Document	Physical Record Management	10/31/2011 2:42 PM	Administrator

New Document Upload Document New Folder

Check Out E-mail a Link

I Like It Tags & Notes

- Shared Documents
- Services Contracts
- Purchase Contracts
- Lists
- Calendar
- Tasks
- Discussions
- Team Discussion
- P8 Archive
- P8 Browse
- P8 Search
- P8 Inbox
- P8 Public Queues
- P8 User Administration
- Recycle Bin
- All Site Content

Services Contracts - ABC-010001.doc

View

Version History	Alert Me
Manage Permissions	Manage Copies
Edit Item	Check Out
Delete Item	
Manage	Actions

Name	ABC-010001
Title	Focus Corporation
Contract Amount	\$45,000.00
Vendor Name	ABC Services
State/Province	Oregon
Status	Final
Migrated	No
Migrated Information	

Content Type: Document
Version: 1.0
Created at 10/5/2011 6:51 PM by System Account
Last modified at 10/5/2011 6:52 PM by System Account

Close

Final
Final
Final
Final
Final
Final
Final
Published
Published
Published
Final
Final
Final

View: All Documents

Last Modifier

Services Contracts - All Documents - Windows Internet Explorer

http://ecmdemo1/sites/Focus/Contracts/Services%20Contracts/Forms/AllItems.aspx

Services (Local)

File Action View Help

Services (Local)

IBM Content Collector Task Routing Engine

[Start](#) the service

Description:
Controls other IBM Content Collector services

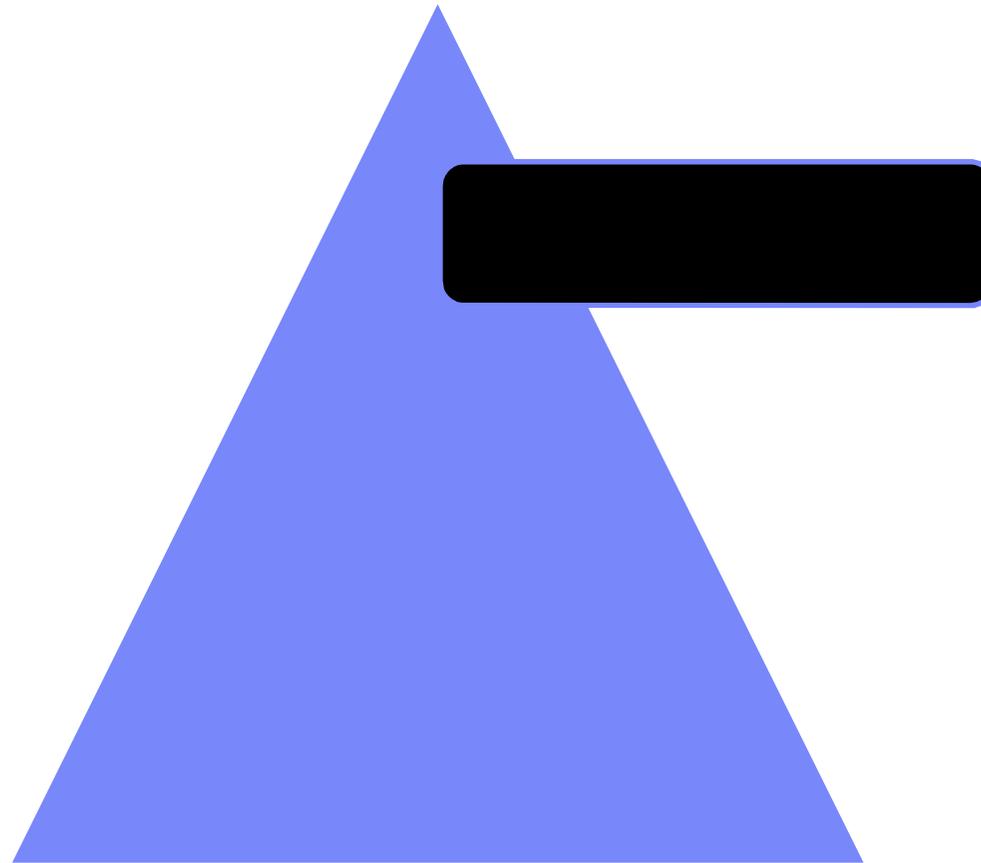
Name	Description	Status	Startup
IBM Cognos	Enables th...		Manual
IBM Content Analytics			Manual
IBM Content Collector File System Repository C...	Enables IB...		Manual
IBM Content Collector FileNet P8 Connector	Enables IB...		Manual
IBM Content Collector Information Help Center	Controls th...		Automati
IBM Content Collector SharePoint Connector	Enables IB...		Manual
IBM Content Collector Task Routing Eng	ot...		Manual
IBM Content Collector Text Extraction C	IB...		Manual
IBM Content Collector Utility Connector	in...		Manual
IBM Content Collector Web Application	th...	Started	Automati
IBM HTTP Administration 7.0	P...		Manual
IBM HTTP Server 7.0	P...		Manual
IBM WebSphere Application Server V7.0	th...	Started	Automati
IBM WebSphere Application Server V7.0	th...		Manual
IBM WebSphere Application Server V7.0	th...		Manual
IBM WebSphere Application Server V7.0	th...		Manual
IBM WebSphere Application Server V7.0	th...		Manual
IBM WebSphere Application Server V7.0	th...		Manual
IIS Admin Service	Enables thi...	Started	Automati
IKE and AuthIP IPsec Keying Modules	The IKEEX...	Started	Automati
InstallDriver Table Manager	Provides s...		Manual
Interactive Services Detection	Enables us...		Disabled
Internet Connection Sharing (ICS)	Provides n...		Disabled
Intersite Messaging	Enables me...	Started	Automati

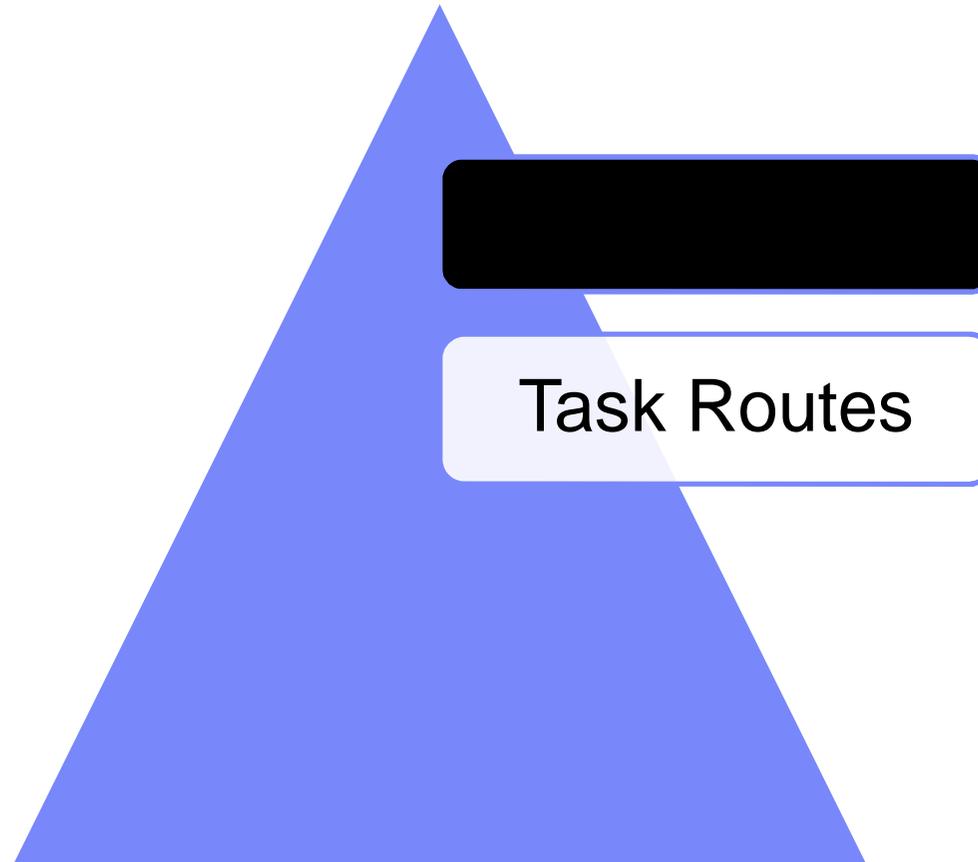
Start service IBM Content Collector Task Routing Engine on Local Computer

Refresh

Logged in as: administrator

ICC for SharePoint demo





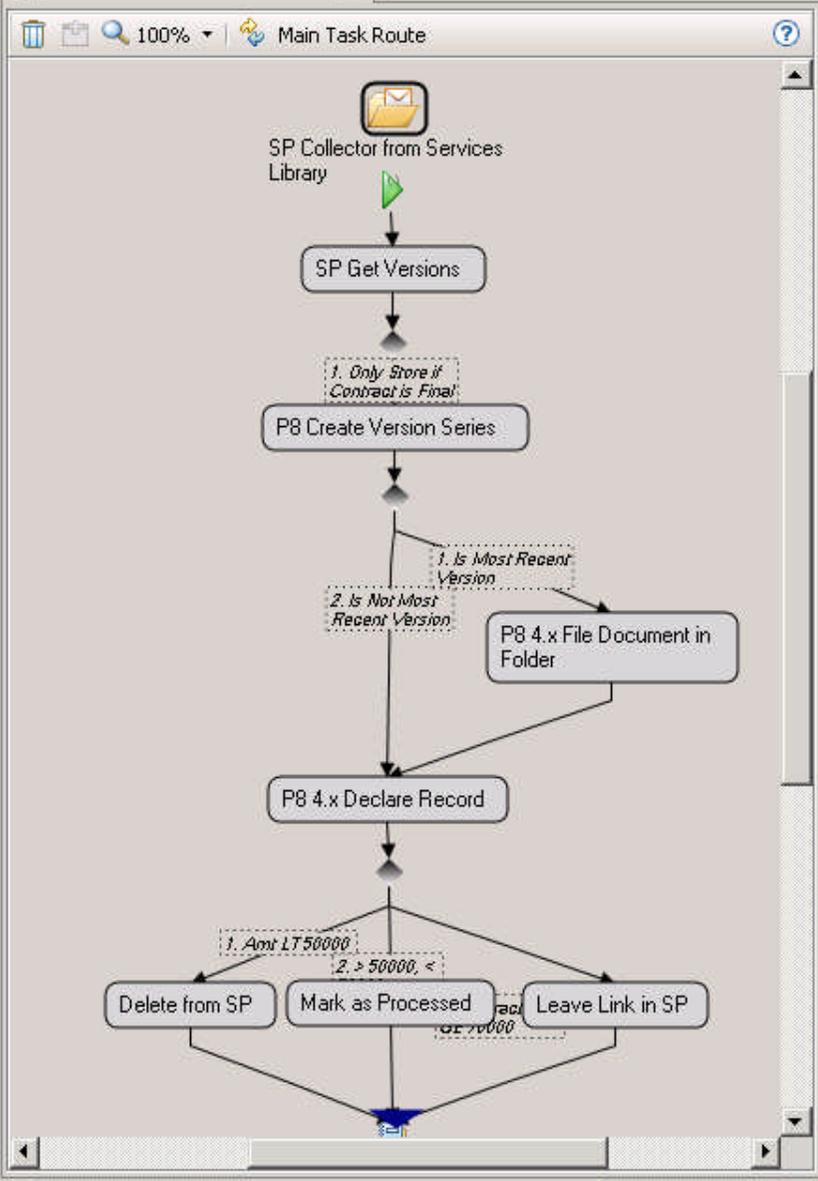
Explorer

- Bulk load iccexos files (Replic...
- Bulk load, collect files (delete)
- Bulk load, collect PST
- EX Archiving (Content Search...
- EX Auto Declaration from ???...
- EX Classification Full Text Re...
- EX Collect PST Classification ...
- Folder BPM Email Metadata R...
- FS Statistics Collection
- FS to P8 Archiving (Declare a...
- SP Statistics Collection
- SP to P8 - With Vendor ...**
- SP to P8 - With Versions

Toolbox

- Link
- Audit Log
- Email**
- File System Repository**
- File System Source**
- IBM Connections**
- IBM FileNet P8**
- Metadata Form**
- SharePoint**
- SP Collector
- SP Create File
- SP Get Versions
- SP Manage Link
- SP Post-processing
- SMTP**
- Text Extraction**
- Utility**

SP to P8 - With Vendor ...



SharePoint Collector

General | Schedule | Collection Sources

General

Name: SP Collector from Services Library

Description: SP Collector collects documents from collection sources, which are configured to crawl and filter documents from SharePoint sites and libraries.

Active

Collection of migrated items

Do not collect previously migrated items

Collect previously migrated items

Collect only previously migrated items

Metadata

Add user-defined metadata to output

SharePoint Generic Defn

Retain IDs in values

ID and value delimiter:

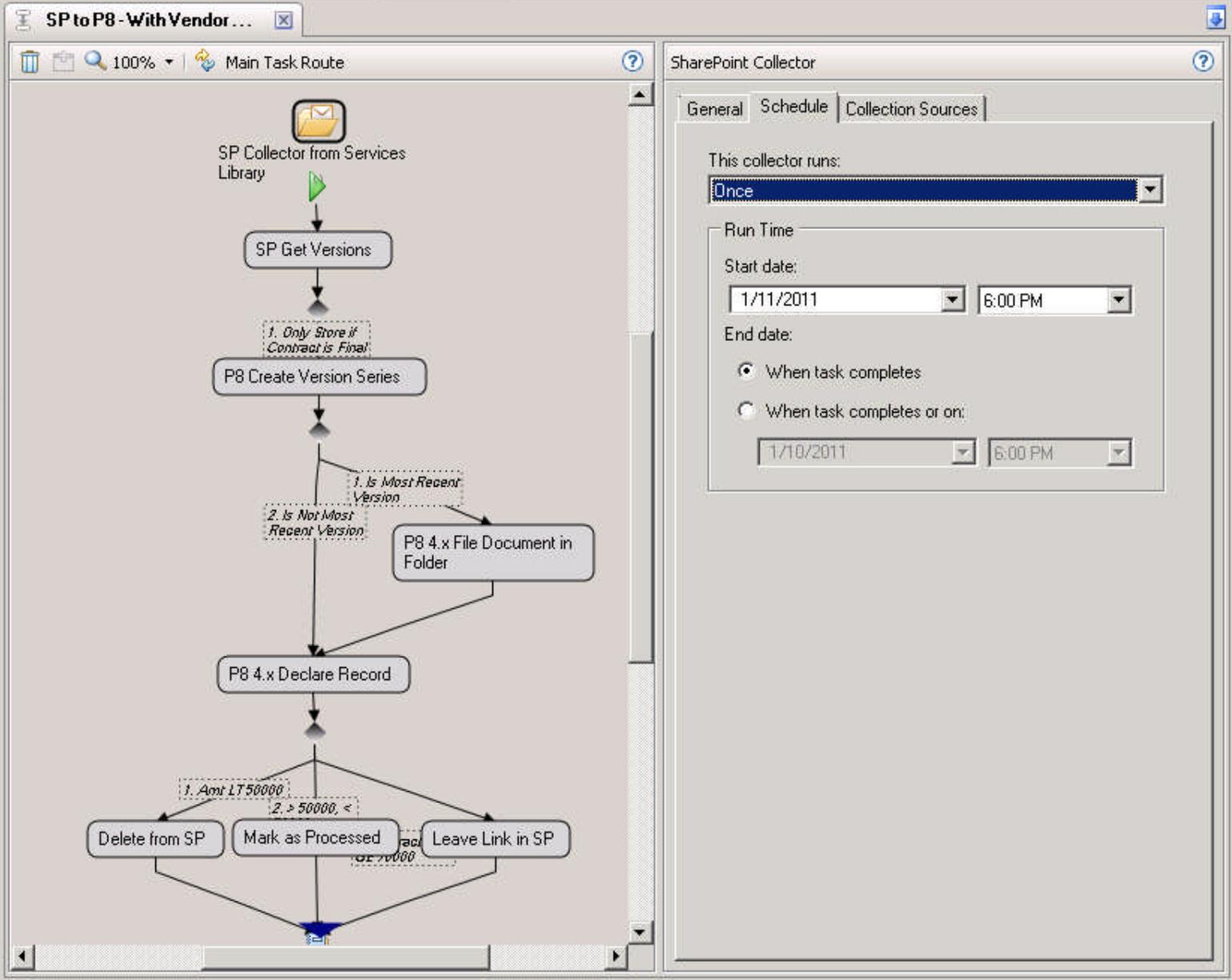
Multiple values delimiter:

Explorer

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SharePoint Collector

General Schedule Collection Sources

This collector runs: **Once**

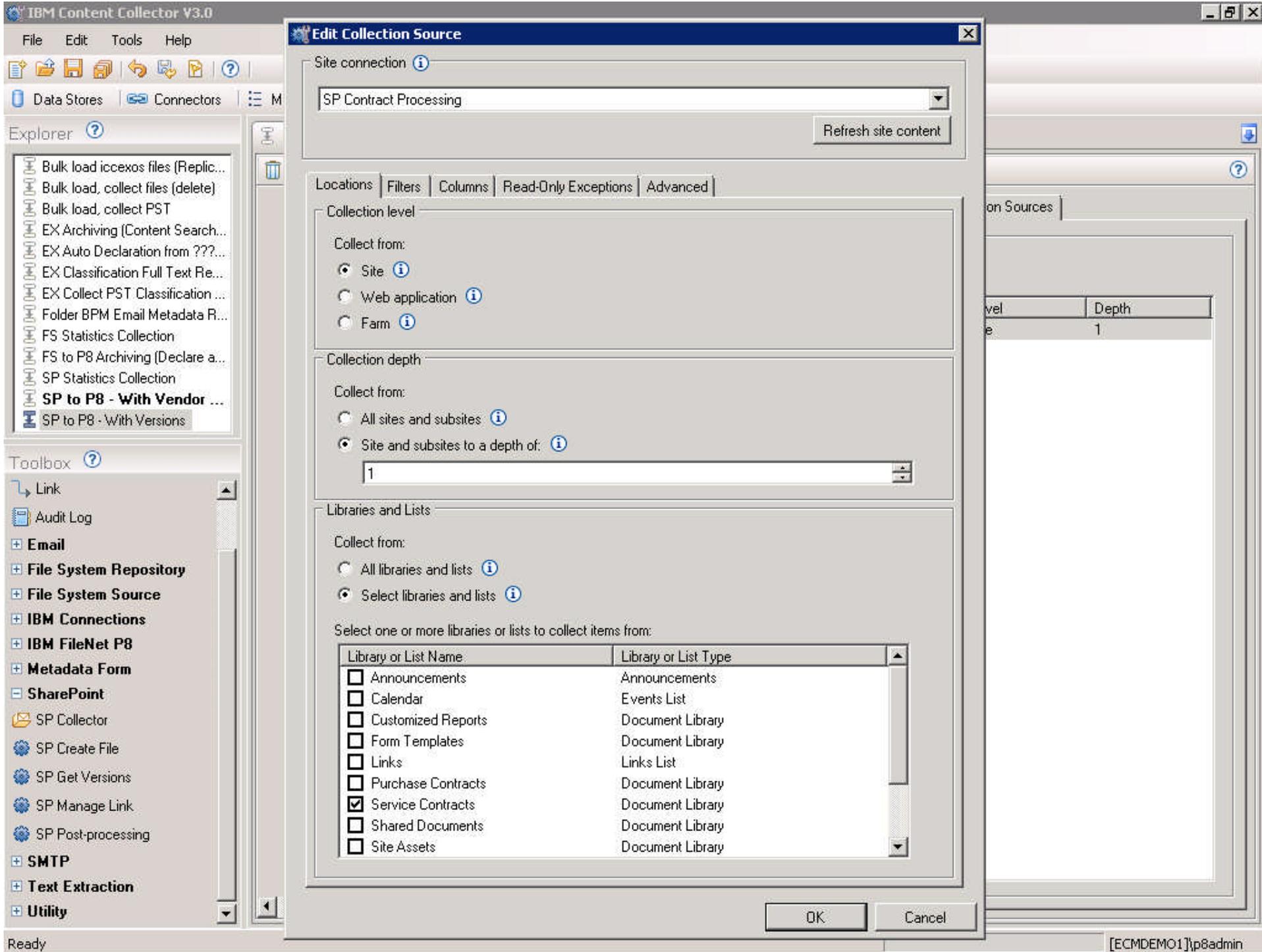
Run Time

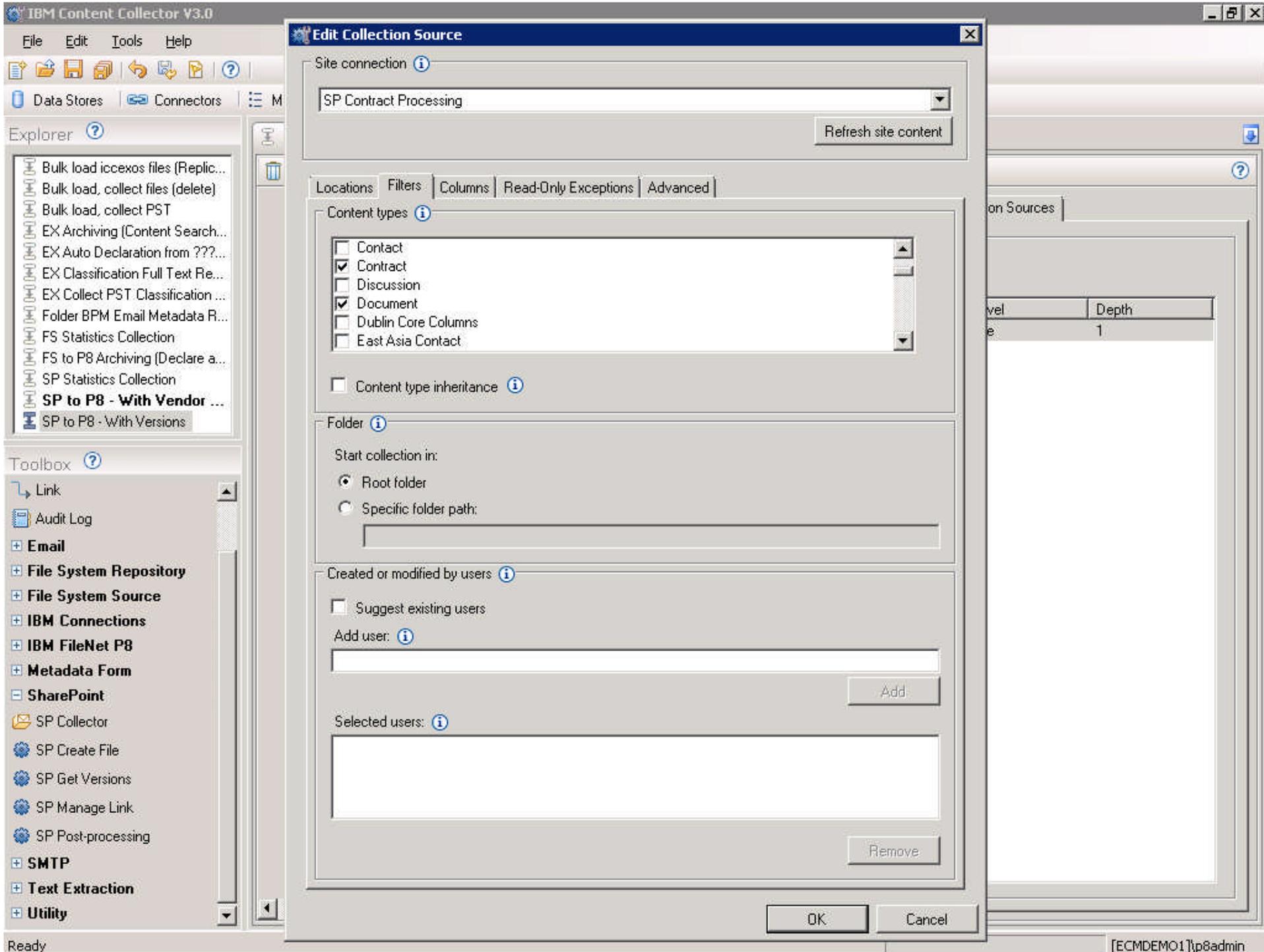
Start date: 1/11/2011 6:00 PM

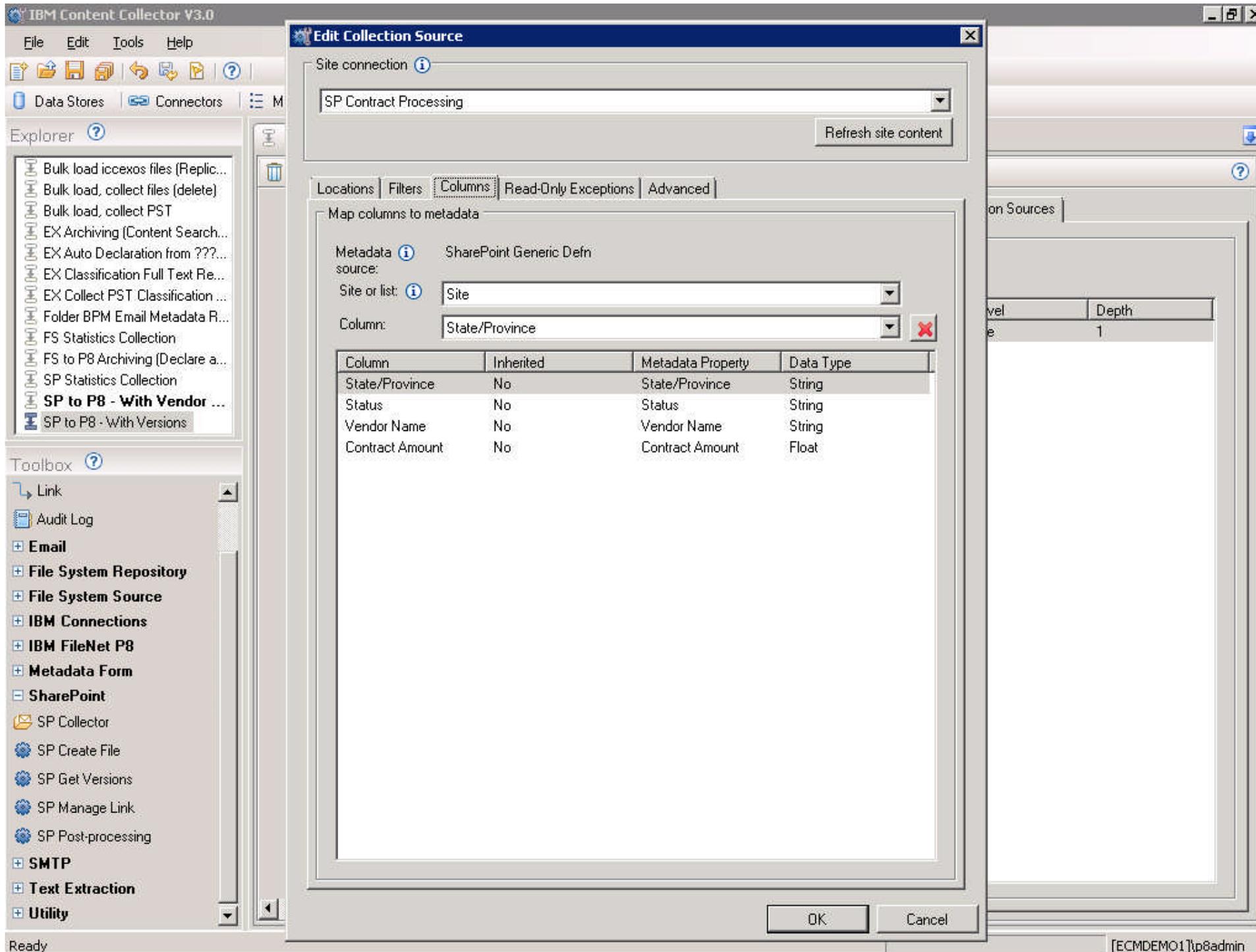
End date: 1/10/2011 6:00 PM

When task completes

When task completes or on:





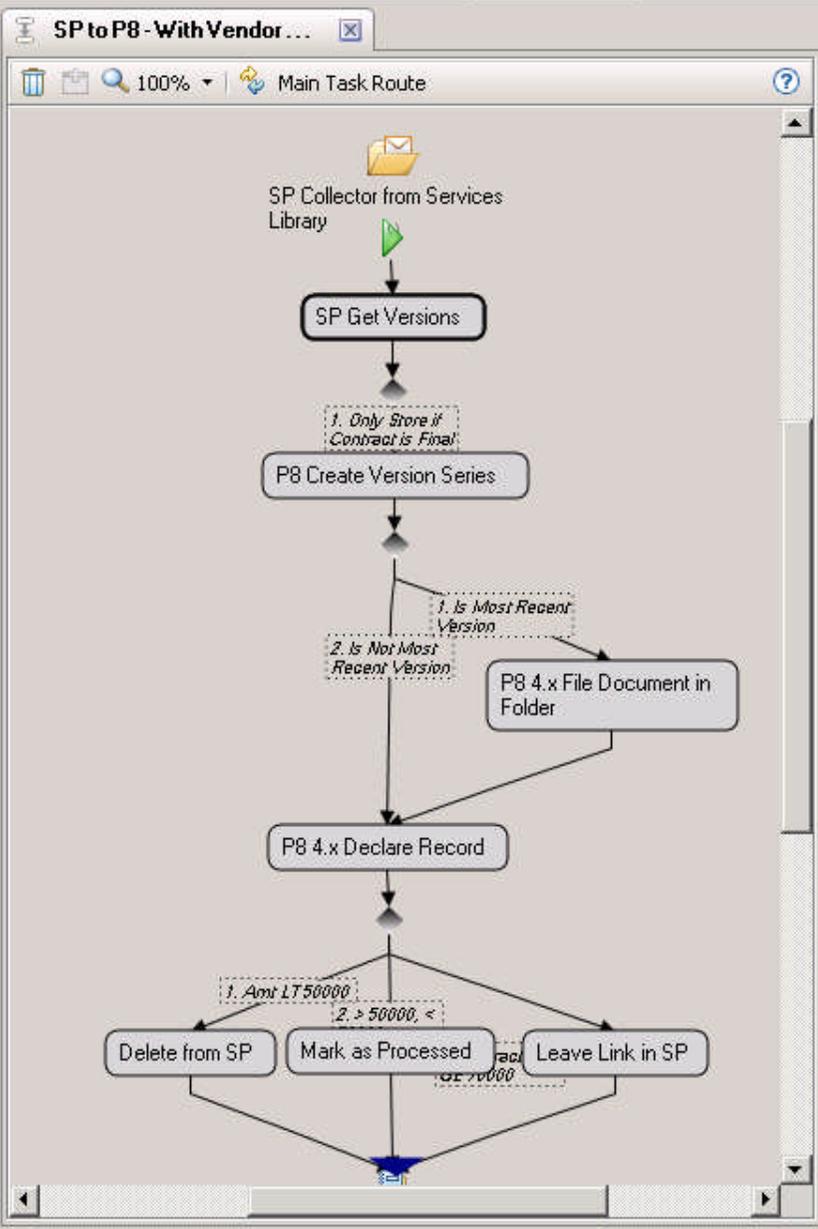


Explorer

- Bulk load iccexos files (Replic...
- Bulk load, collect files (delete)
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SP Get Versions

General

Name: SP Get Versions

Description: SP Get Versions specifies how many versions of each SharePoint document the task route processes.

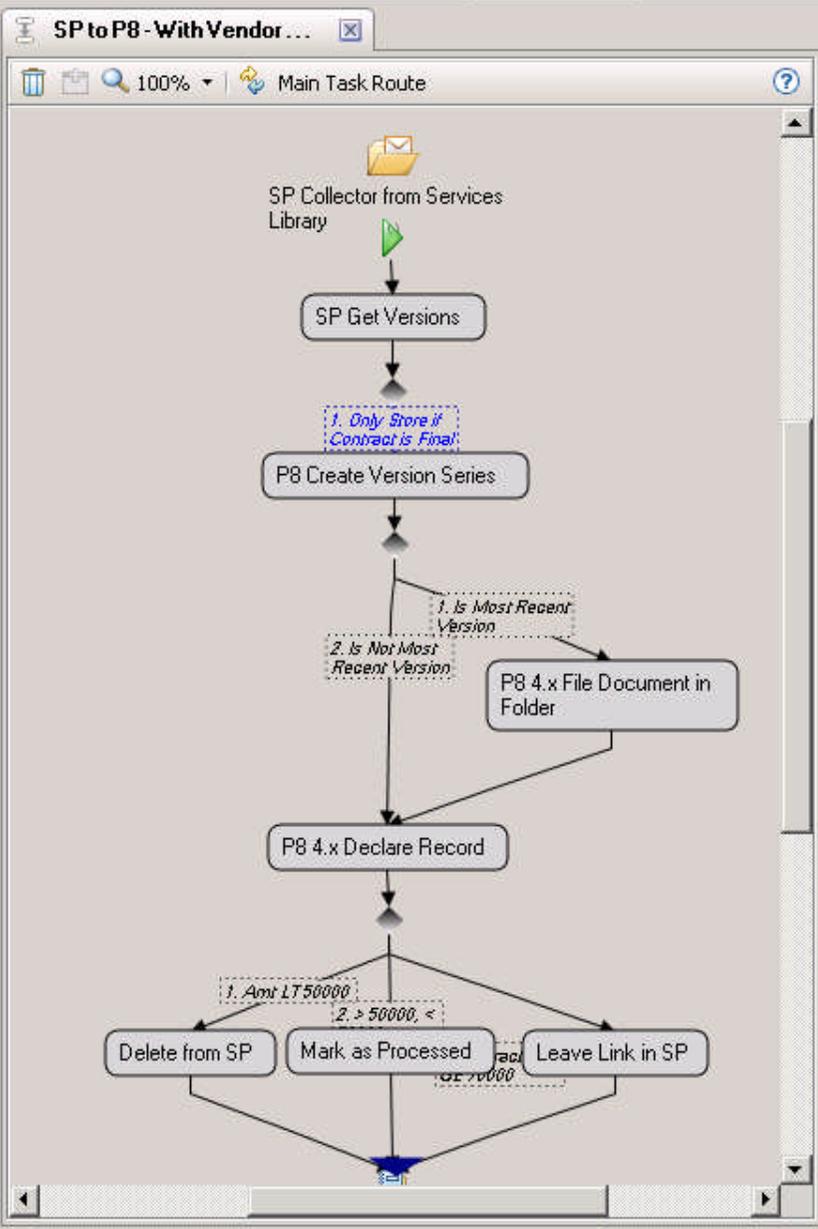
Versions

All versions

1 versions

- Explorer
- Bulk load iccexos files (Replic...
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 - Bulk load, collect PST
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- Toolbox
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Rule

General

Name: Only Store if Contract is Final

Description:

Configure Rule

Specify rule evaluation criteria:

- Always true
- Advanced**

IEqual

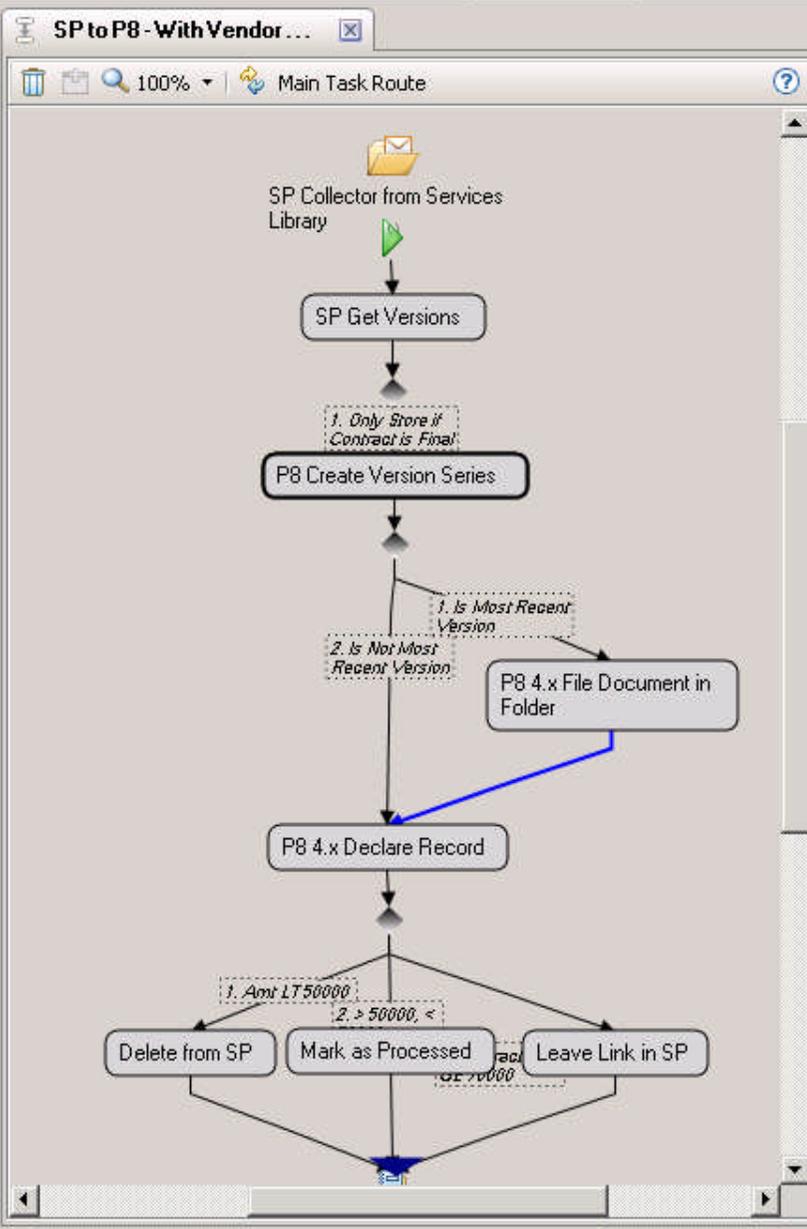
- "Final",
- <SharePoint Generic Defn, Status>

Explorer

- Bulk load iccexos files (Replic...
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P8 Create Version Series

P8 Connection

Connection: P8 Connection

Object store: ICCEXOS

User name: p8admin

Checkin Options

Auto classify

Content capture options:

Transfer content (default)

Reference external content

Do not transfer content (contentless)

Add multiple content elements

Set content retrieval name

Retrieval name metadata mapping:

Source: Property:

Shortcut link: [https://ecmdemo1:11443/AFUWeb/RetrieveDocument.do?r=<](https://ecmdemo1:11443/AFUWeb/RetrieveDocument.do?r=)

Property Mappings

Document class: ICCSharepointInstance 2

Show "Hidden Properties"

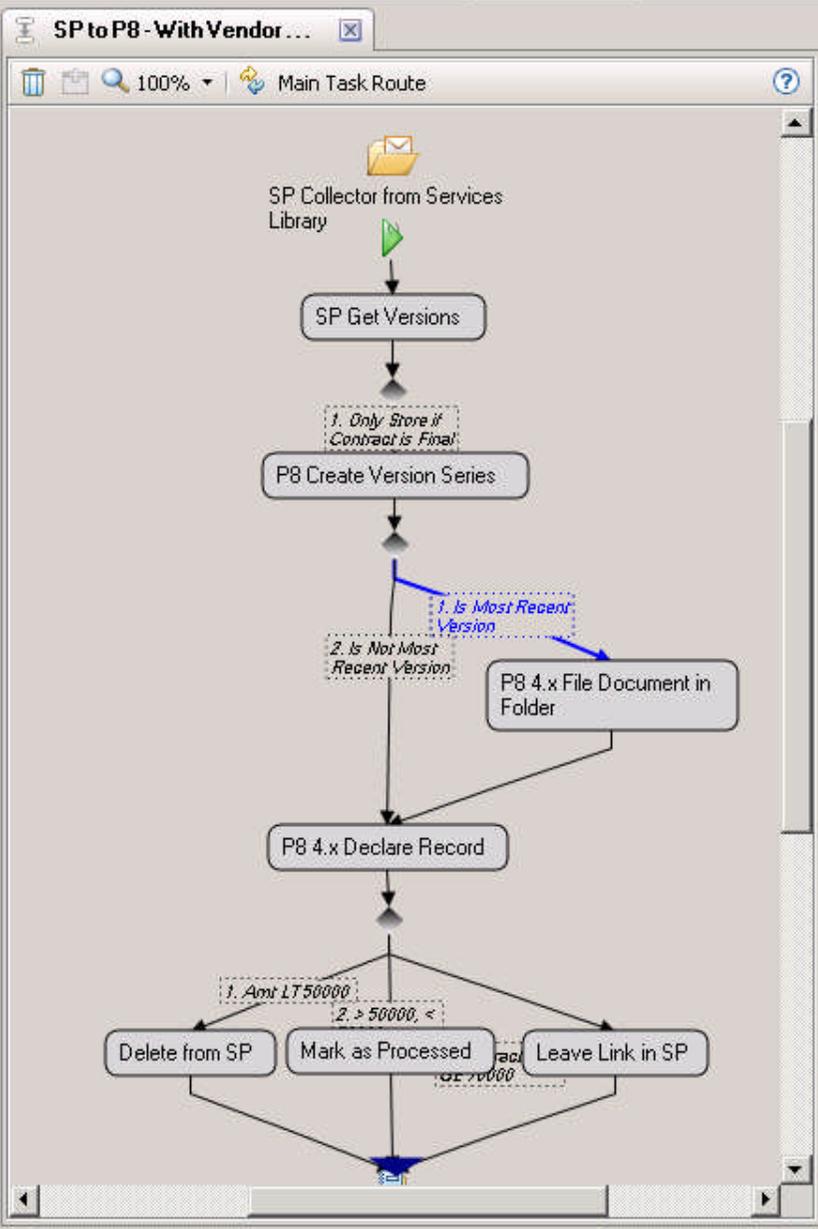
Property	Value
Document Title	<SP Collection, Name>
ICCCategory	

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Rule

General

Name: Is Most Recent Version

Description:

Configure Rule

Specify rule evaluation criteria:

Always true

Advanced

```

    And(
      Equal(
        TRUE,
        <SP Collection, Last Version>
      ),
      Equal(
        FALSE,
        <Re-collection, Re-collection Flag>
      )
    )
  
```



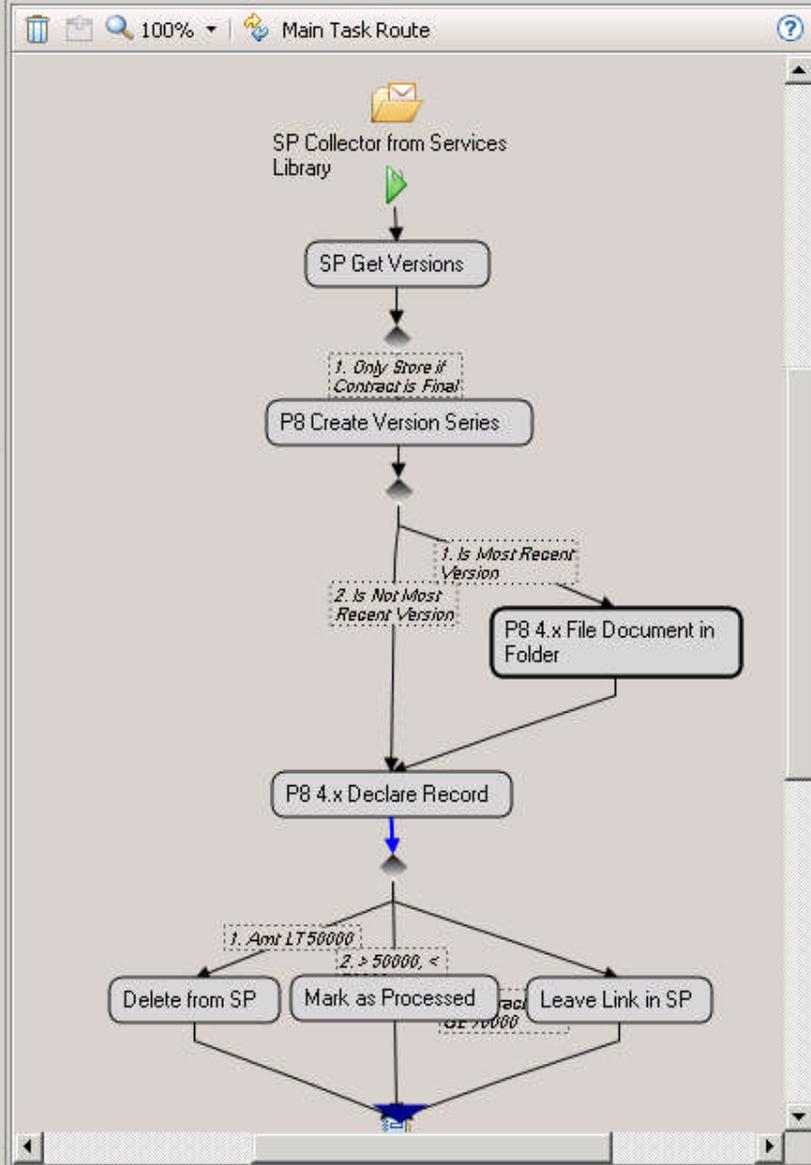
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- SP Manage Link
- SP Post-processing
- SMTP**
- Text Extraction**
- Utility**

SP to P8 - With Vendor ...



P8 File Document: In Folder

General

Name: P8 4.x File Document in Folder

Description: This task saves document objects to specific repository folders to facilitate search and retrieval.

P8 Connection

Connection: P8 Connection
Object store: ICCEXDS
User name: p8admin

File in Folder Options

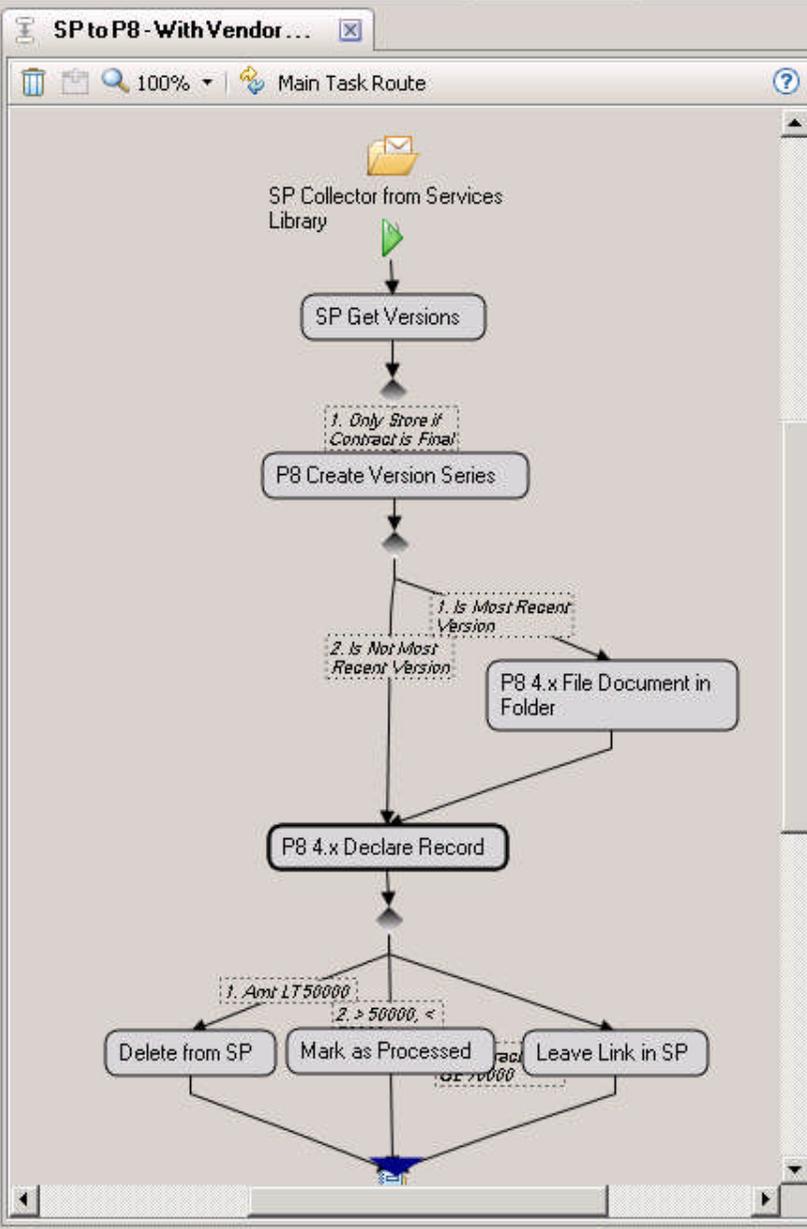
Folder path: Add"/Contracts/Approved Services Contracts/"<SharePoint Ge

Edit... Add... Remove

- Create folder if it does not exist
- Inherit folder security:
 - Set security parent of document to folder
 - Add folder security to document security

- Explorer
- Bulk load iccexos files (Replic...
 - Bulk load, collect files (delete)
 - Bulk load, collect PST
 - EX Archiving (Content Search...
 - EX Auto Declaration from ???...
 - EX Classification Full Text Re...
 - EX Collect PST Classification ...
 - Folder BPM Email Metadata R...
 - FS Statistics Collection
 - FS to P8 Archiving (Declare a...
 - SP Statistics Collection
 - SP to P8 - With Vendor ...**
 - SP to P8 - With Versions

- Toolbox
- Link
 - Audit Log
 - Email**
 - File System Repository**
 - File System Source**
 - IBM Connections**
 - IBM FileNet P8**
 - Metadata Form**
 - SharePoint**
 - SP Collector
 - SP Create File
 - SP Get Versions
 - SP Manage Link
 - SP Post-processing
 - SMTP**
 - Text Extraction**
 - Utility**



P8 Declare Record

General

Name: P8 4.x Declare Record

Description: This task enables records declaration in IBM FileNet Records Manager.

P8 Connection

Connection: FPOS

Object store: FPOS

User name: p8admin

Configure Classifications

Classifications: [i](#)

Configured Classifications

"/Records Management/Corporate File Plan/..."

Add... Edit... Remove

Property Mappings

Record Class: [i](#)

Contract Record [Browse...](#)

Show "Hidden Properties" [i](#)

Property	Value
Document Title	<SP Collection, Name>

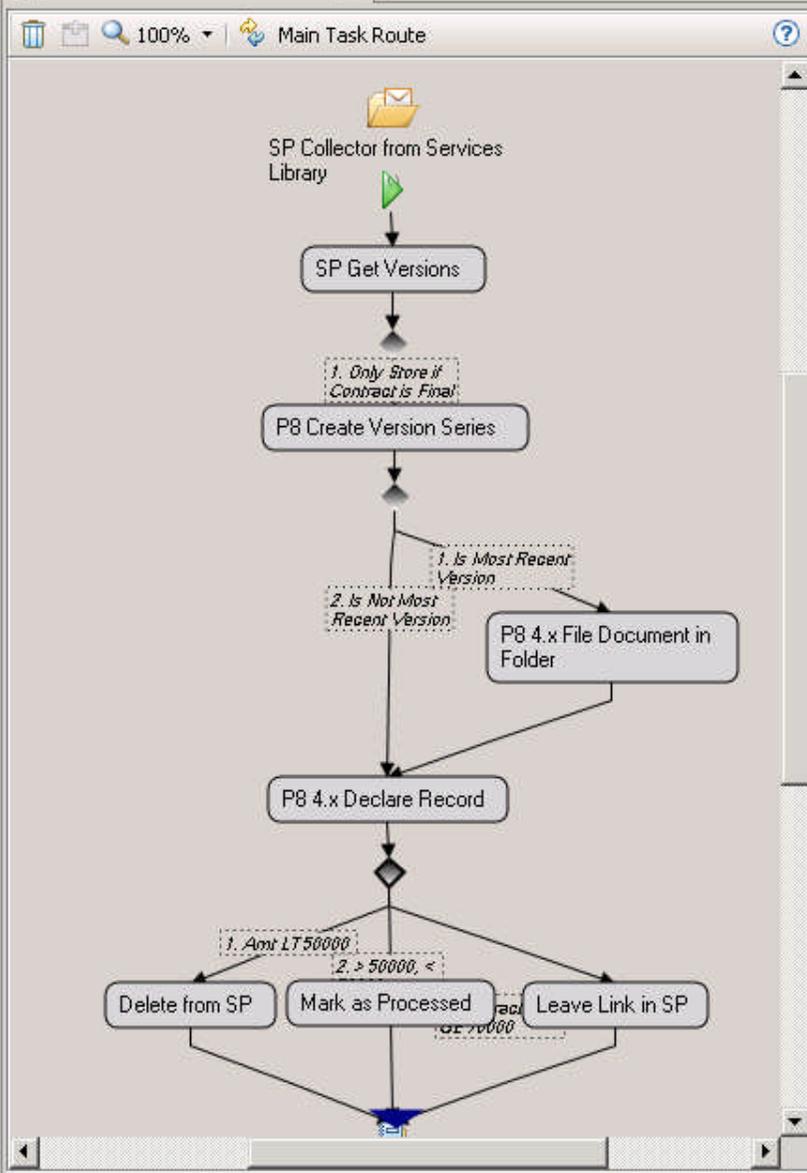
Explorer

- Bulk load iccexos files (Replic...
- Bulk load, collect files (delete)
- Bulk load, collect PST
- EX Archiving (Content Search...
- EX Auto Declaration from ???...
- EX Classification Full Text Re...
- EX Collect PST Classification ...
- Folder BPM Email Metadata R...
- FS Statistics Collection
- FS to P8 Archiving (Declare a...
- SP Statistics Collection
- SP to P8 - With Vendor ...**
- SP to P8 - With Versions

Toolbox

- Link
- Audit Log
- Email**
- File System Repository**
- File System Source**
- IBM Connections**
- IBM FileNet P8**
- Metadata Form**
- SharePoint**
- SP Collector
- SP Create File
- SP Get Versions
- SP Manage Link
- SP Post-processing
- SMTP**
- Text Extraction**
- Utility**

SP to P8 - With Vendor ...



Rule Order

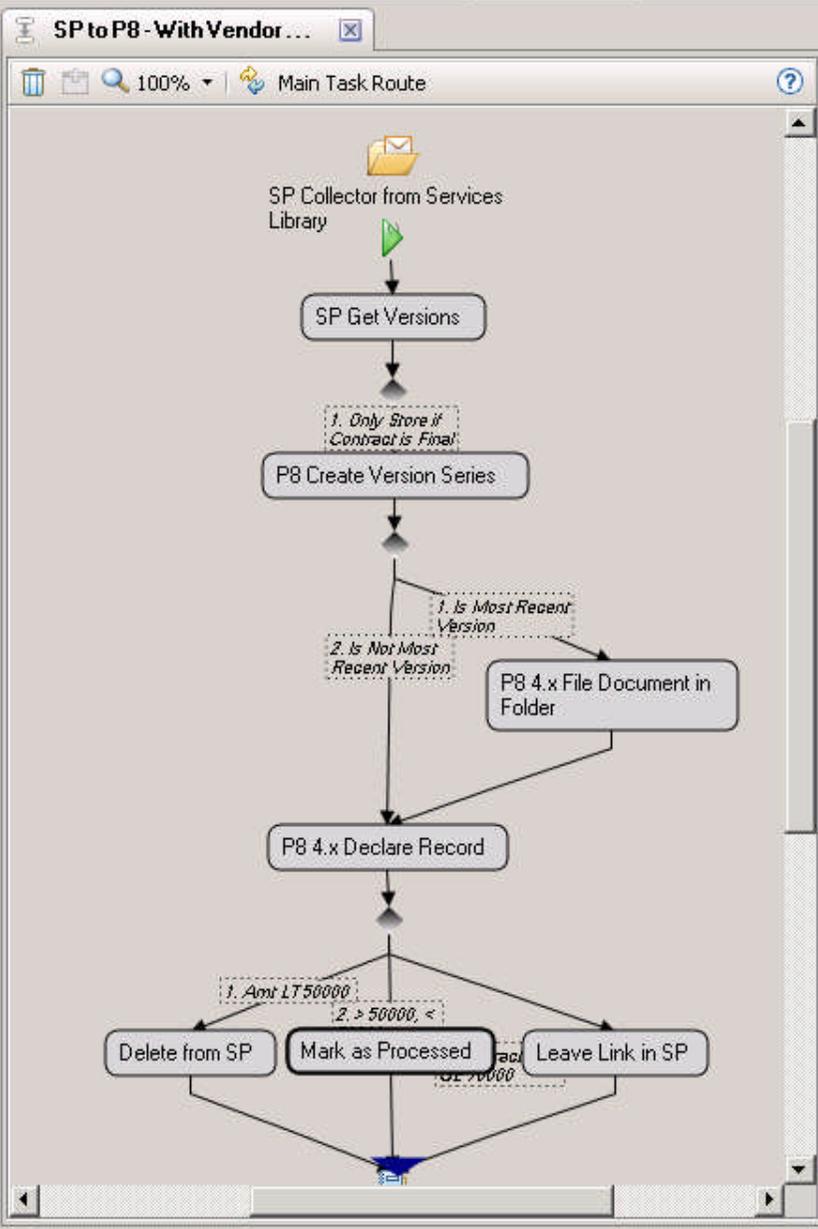
- Evaluation order
- Amt LT 50000
 - > 50000, < 70000
 - Contract Amt GE 70000

Explorer

- Bulk load iccexos files (Replic...
- Bulk load, collect files (delete)
- Bulk load, collect PST
- EX Archiving (Content Search...
- EX Auto Declaration from ???...
- EX Classification Full Text Re...
- EX Collect PST Classification ...
- Folder BPM Email Metadata R...
- FS Statistics Collection
- FS to P8 Archiving (Declare a...
- SP Statistics Collection
- SP to P8 - With Vendor ...**
- SP to P8 - With Versions

Toolbox

- Link
- Audit Log
- Email**
- File System Repository**
- File System Source**
- IBM Connections**
- IBM FileNet P8**
- Metadata Form**
- SharePoint**
- SP Collector
- SP Create File
- SP Get Versions
- SP Manage Link
- SP Post-processing
- SMTP**
- Text Extraction**
- Utility**



SP Post-processing

General

Name:

Description:

Item retention in SharePoint

- Leave Item *i*
- Make item read-only (with exceptions) *i*
- Replace with link *i*
- Delete *i*

Version retention in SharePoint

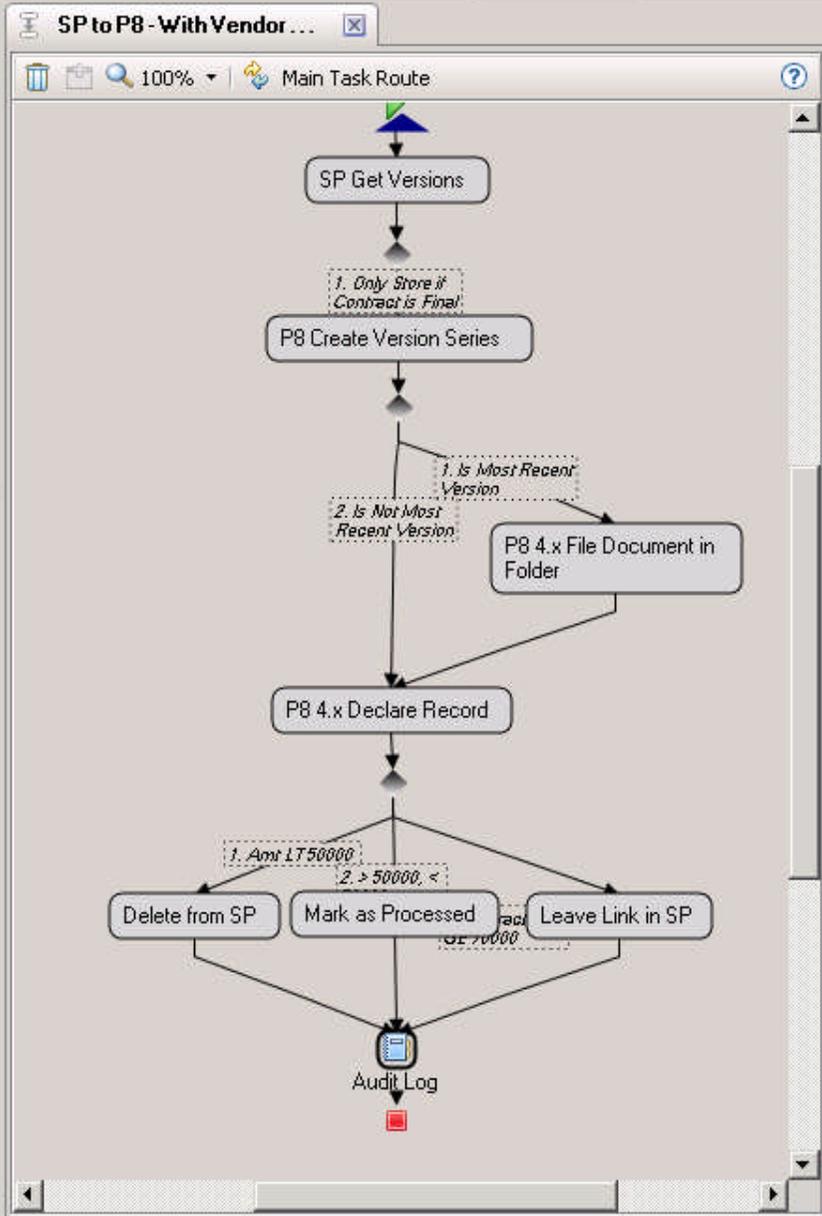
- All versions *i*
- Most recent version only *i*

Explorer

- Bulk load iccexos files (Replic...
- Bulk load, collect files (delete)
- Bulk load, collect PST
- EX Archiving (Content Search...
- EX Auto Declaration from ???...
- EX Classification Full Text Re...
- EX Collect PST Classification ...
- Folder BPM Email Metadata R...
- FS Statistics Collection
- FS to P8 Archiving (Declare a...
- SP Statistics Collection
- SP to P8 - With Vendor ...**
- SP to P8 - With Versions

Toolbox

- Link
- Audit Log
- Email**
- File System Repository**
- File System Source**
- IBM Connections**
- IBM FileNet P8**
- Metadata Form**
- SharePoint**
- SP Collector
- SP Create File
- SP Get Versions
- SP Manage Link
- SP Post-processing
- SMTP**
- Text Extraction**
- Utility**



Audit Log

General

Name:

Audit Log

Description:

Settings

Audit log file name format:

Use default

Specify file identifier: [i](#)

Field Delimiter: [i](#)

,

Value delimiter: [i](#)

|

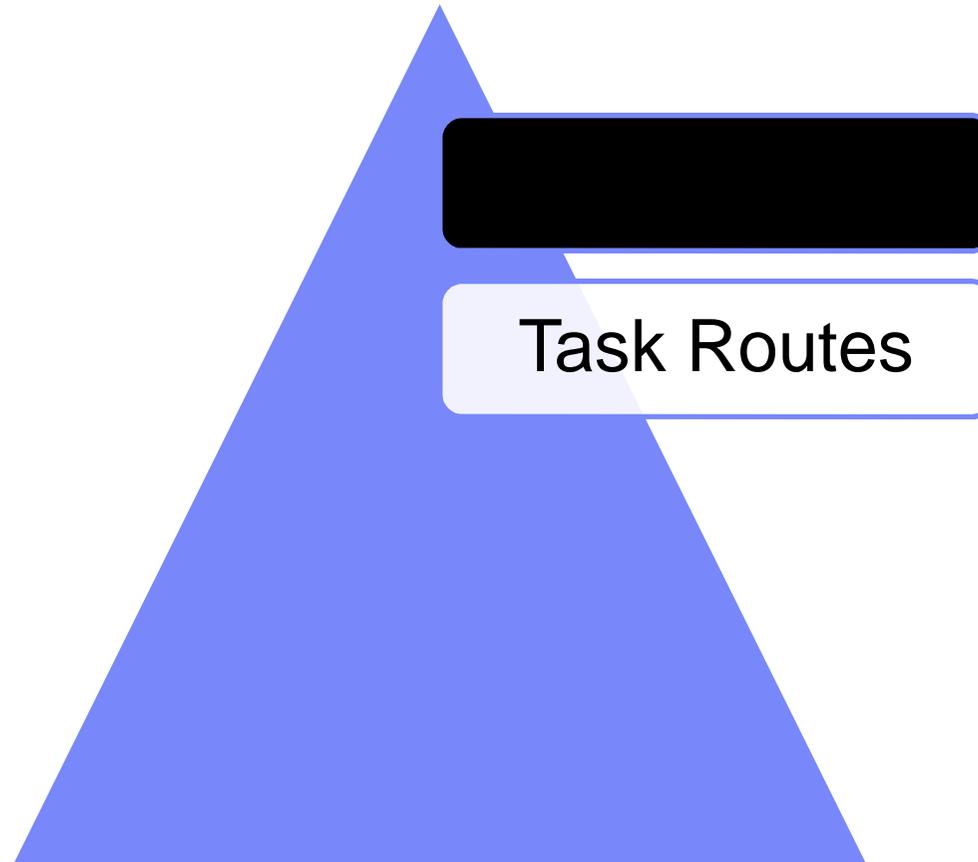
Quote character: [i](#)

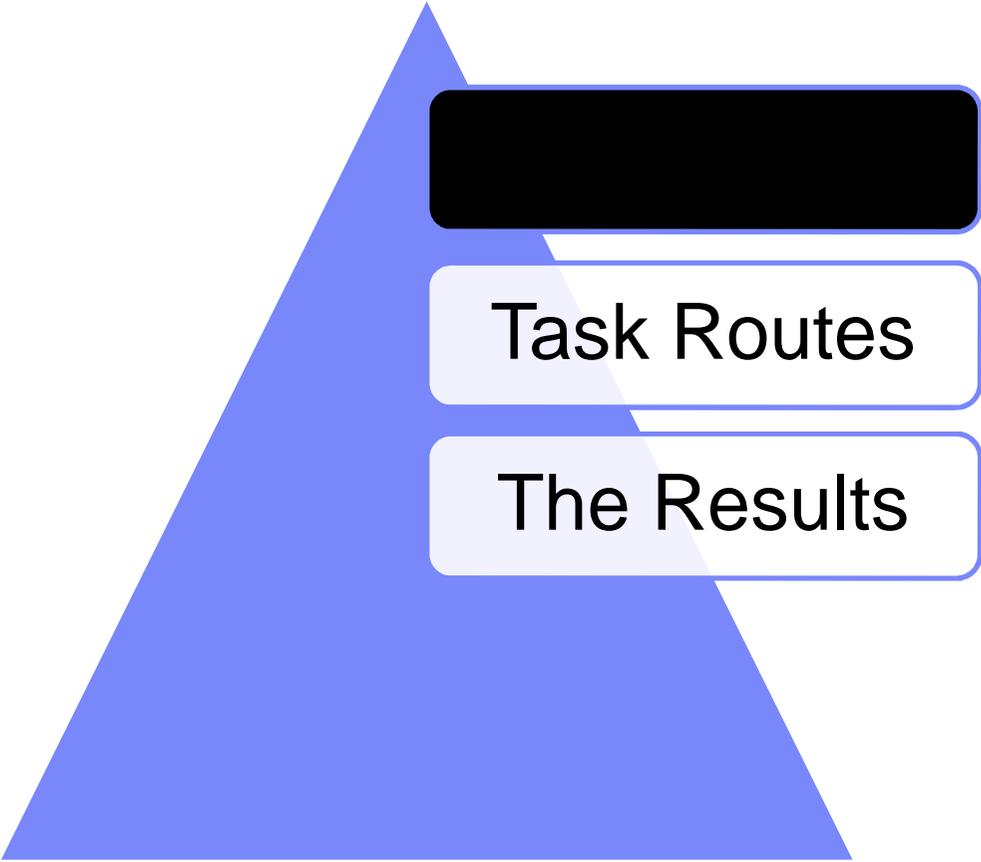
'

Audit log fields:

Show/hide IDs

- File
- HTTP URL
- P8 Create Document
- Connection Name
- Is Duplicate
- Object Class
- Object ID
- Object Store





Service Contracts - Contracts - Windows Internet Explorer

http://ecmdemo1:81/Service%20Contracts/Forms/Contracts.aspx

Service Contracts - Contracts

Site Actions

focus CORPORATION

Contract Processing > Service Contracts

I Like It Tags & Notes

Home Search this site...

Libraries

- Site Pages
- Shared Documents
- Service Contracts**
- Purchase Contracts

Lists

- Calendar
- Tasks

Discussions

- Team Discussion

P8 Archive

- P8 Browse
- P8 Search
- P8 Personal Inbox
- P8 Public Queues
- P8 User Admin

Type	Name	Contract Amount	Vendor Name	State/Province	Status
	ABC-010002	\$55,000.00	ABC Services	Oregon	Final
	IBM-030002	\$67,000.00	IBM	New York	Published
	IBM-030003	\$87,000.00	IBM	New York	Published
	IBM-090001	\$34,000.00	IBM	New York	Published
	FXM-020002.doc	\$74,000.00	FXM Corp	Nebraska	Final
	FXM-030001.doc	\$83,000.00	FXM Corp	Nebraska	Final
	LAL-040001.doc	\$89,000.00	Larson and Larson	Kansas	Final

[Add document](#)

Approved Services Contracts

Logged in as: p8admin View: **All Documents**

Type	Name	Content Size	Date Last Modified	Last Modifier
	ABC Services	0 KB	8/20/2013 4:27 PM	p8admin
	ACE Corp	0 KB	8/20/2013 4:28 PM	p8admin
	FXM Corp	0 KB	8/20/2013 4:28 PM	p8admin
	Larson and Larson	0 KB	8/20/2013 4:28 PM	p8admin

Service Contracts - Contracts - Windows Internet Explorer

http://ecmdemo1:81/Service%20Contracts/Forms/Contracts.aspx

Service Contracts - Contracts

Service Contracts - ABC-010002.doc

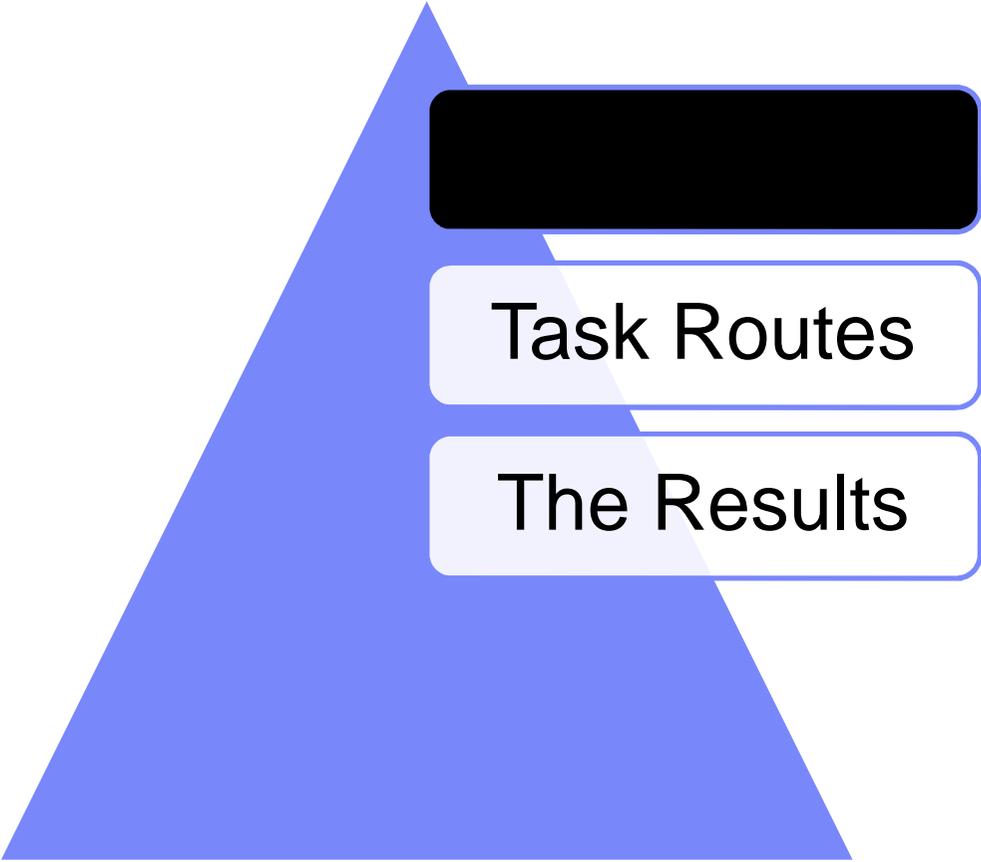
View

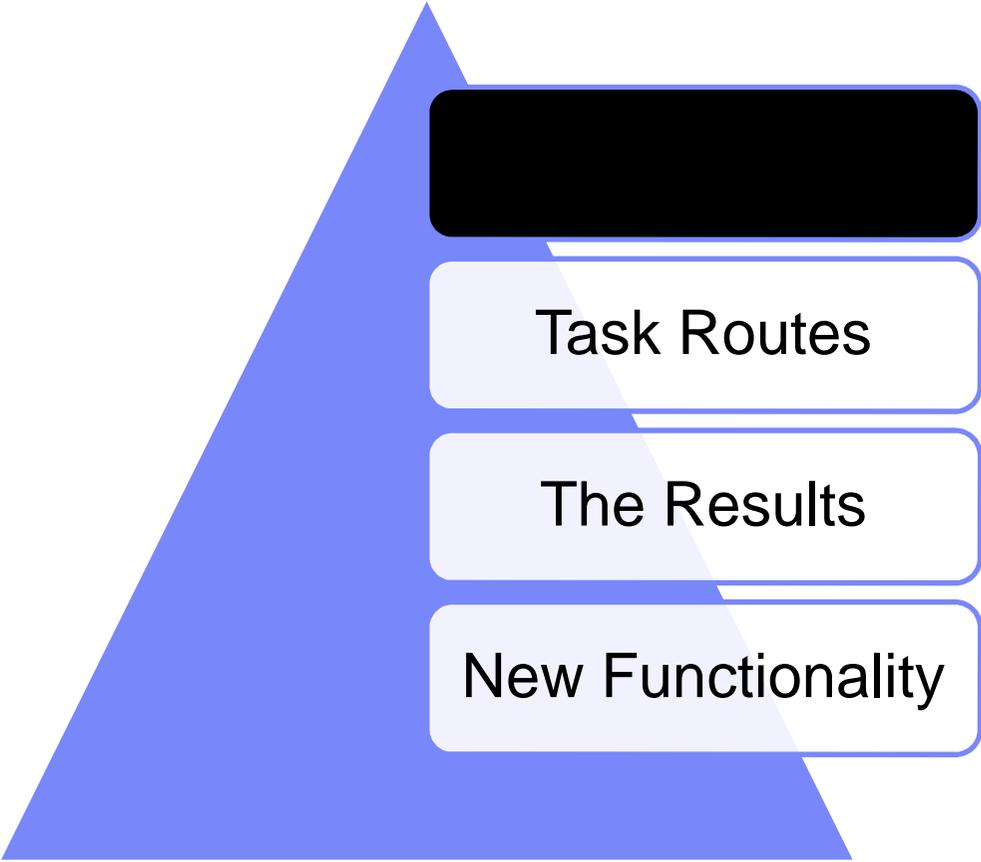
- Version History
- Alert Me
- Manage Permissions
- Manage Copies
- Edit Item
- Delete Item
- Check Out

Name	ABC-010002
Title	Focus Corporation
Contract Amount	\$55,000.00
Migrated	Yes
Migrated Information	RT: P8 RN: ICCEXOS RD: {1C5D8F5F-6D29-4425-9C20-DA4DD6411BE1} ID: {74CEE6E2-6FC3-45C0-953A-DE3BB4D105A8} VD: {03FCAA95-ABC5-42C4-BD52-95AA44E52730} VC: 1 LV: 1.0 MD: 2013-08-20T20:28:00Z
State/Province	Oregon
Status	Final
Vendor Name	ABC Services

Content Type: Document
Version: 1.0
Created at 8/14/2012 6:20 PM by p8admin
Last modified at 8/14/2012 6:20 PM by p8admin

Close





- Setting up Integration
 - Plugins
 - Repositories
 - Menus
 - Desktops
- Cross-Repository Search
- Using Web Parts
 - Search
 - Work
 - Browse

Setting Up Integration – Plug-ins



The screenshot shows the IBM Case Manager administration tool interface. The browser window is titled "Copy Review" and the user is logged in as "p8admin". The left sidebar contains navigation options: Desktops, Repositories, Sync Services, FileNet Content Manager, Content Manager OnDemand, Daeja ViewONE, Viewer Maps, Plug-ins (selected), Menus, Labels, Themes, Icon Mapping, and Settings. The main content area has tabs for Desktops, Repositories, SharePoint 2013 Contracts, *New Repository, and Plug-ins. Below the tabs, there is a text block explaining that plug-ins must be registered via the administration tool and that configuration parameters are shown after registration. An important note states that editing a plug-in referenced elsewhere can cause problems and that plug-ins are invoked in the order they are listed. Below this is a toolbar with buttons: New Plug-in, Edit, Enable, Disable, Delete, Refresh, Move Up, Move Down, Save Order, and a search box labeled "Name contains". A table lists the installed plug-ins with their names and versions.

You must use the administration tool to register plug-ins for the web client. If a plug-in requires additional configuration, the configuration parameters are displayed after you register the plug-in.

Important: If you edit a plug-in that is referenced in another area of the administration tool, such as a menu, you might encounter problems with the behavior of the plug-in. In addition, the plug-ins are invoked in the order that they are listed. If a plug-in needs to be run before another plug-in, ensure that the plug-ins are listed in the order in which they must be run.

New Plug-in Edit Enable Disable Delete Refresh Move Up Move Down Save Order

Name	Version
External Data Services Support	2.0.3
IBM Case Manager API plug-in	5.2.0.1 (icmapi5.2.0.001.002.002)
IBM Case Manager administration plug-in	5.2.0.1 (icmadmin5.2.0.001.001.041)
IBM Case Manager client plug-in	5.2.0.1 (icmclient5.2.0.001.002.001)
IBM Content Analytics with Enterprise Search	2.0.3
IBM Content Classification	2.0.2
IBM QuickFile Plug-in	2.0.3
IBM Sametime and Connections plug-in	2.0.3
Portal Plug-in	2.0.3
Microsoft SharePoint Plug-in	2.0.3

9/9/2014, 10:39 AM - The in-basket returned 2 work items.

Setting Up Integration - Repositories



The screenshot shows the IBM Content Manager interface in a Firefox browser window. The page title is 'Copy Review'. The left sidebar contains navigation options: Desktops, Repositories, Sync Services, FileNet Content Manager, Content Manager OnDemand, Daeja ViewONE, Viewer Maps, Plug-ins, Menus, Labels, Themes, Icon Mapping, and Settings. The main content area has tabs for 'Desktops', 'Repositories', 'SharePoint 2013 Contracts', and '*New Repository'. A dropdown menu is open over the 'New Repository' button, listing options: Content Manager, Content Manager OnDemand, FileNet Content Manager, Content Management Interoperability Services (CMIS), and Connection to Microsoft SharePoint Site. The last two options are circled in red. Below the dropdown is a table of existing repositories.

		Server Type	Server Name
		FileNet Content Manager	iiop://base-win2k8x64.ecmdemo.ibm.com:2811/FileNet/Engine
		Content Manager OnDemand	localhost
		FileNet Content Manager	iiop://base-win2k8x64.ecmdemo.ibm.com:2811/FileNet/Engine
		FileNet Content Manager	iiop://Base-Win2k8x64.ecmdemo.ibm.com:2811/FileNet/Engine
		FileNet Content Manager	iiop://Base-Win2k8x64.ecmdemo.ibm.com:2811/FileNet/Engine
		Content Management Interoperability Services (CMIS)	http://base-win2k8x64:81/sites/Focus/_vti_bin/cmris/rest?getRepositories

9/9/2014, 10:39 AM - The in-basket returned 2 work items.

Setting Up Integration - Menus



The screenshot shows the IBM Content Manager interface in a Firefox browser window. The browser address bar shows the URL: `https://base-win2k8x64.ecmdemo.ibm.com/navigator/?desktop=CopyReview`. The page title is "Copy Review".

The interface has a left-hand navigation menu with the following items: Home, Desktops, Repositories, Sync Services, FileNet Content Manager, Content Manager OnDemand, Daeja ViewONE, Viewer Maps, Plug-ins, Menus, Labels, Themes, Icon Mapping, and Settings. The "Menus" item is selected.

The main content area shows the configuration for a context menu titled "Default Document Context Menu with QuickFile". At the top, there are tabs for "Desktops", "Menus", and "Default Document Context Menu with QuickFile". Below the tabs are buttons for "Save and Close", "Save", "Reset", and "Close".

The configuration form includes the following fields:

- Name:** Default Document Context Menu with QuickFile
- ID:** DocumentContextMenuwithQuickFile
- Description:** Displayed when the user right-clicks a document in
- Type:** Document context menu

Below the form are two buttons: "Add Separator" and "Add Submenu".

At the bottom, there are two panels:

- Available:** A list of actions including "Add and Classify Document", "Add to Microsoft SharePoint", "All Parts as a PDF file", "All Parts as a PDF File", "As PDF", "Open", and "View Child Documents".
- Selected:** A list of actions including "Open", "Preview", "Properties", "View Notes", "Download", "Add to Favorites", "Export", and "Delete".

The status bar at the bottom of the browser window displays the message: "9/9/2014, 5:40 PM - The Customer Contracts folder returned 4 items."

Setting Up Integration - Desktop



Copy Review

Save and Close Save Reset Close

Desktop: **Copy Review**

• General • **Repositories** • Layout Appearance • Menus Workflows Mobile

Specify which repositories you want users to have access to from this desktop. You must configure your repositories before you can add them to the desktop.

Tip: You can limit which repositories are available for each feature when you configure the desktop layout.

Filter

Available Repositories	Selected Repositories
Connection to SharePoint Contracts	ECM
ICMCMDS	IBM FileNet and Connections
ICMCMTOS	IBM CM OnDemand
SharePoint 2013 Contracts	

9/9/2014, 5:37 PM - The Customer Contracts folder returned 4 items.

Setting Up Integration - Desktop



The screenshot shows the IBM FileNet interface in a Firefox browser window. The address bar shows the URL: `https://base-win2k8x64.ecmdemo.ibm.com/navigator/?desktop=CopyReview`. The user is logged in as `p8admin`. The interface displays a folder view of `Customer Contracts` with a table of files. A context menu is open over a file, with `Add to Microsoft SharePoint` highlighted.

Name	Size	Modified By	Modified On	Major Ver
Account 25-13652		p8admin	10/21/2013, 2:03 PM	
Account 35-17232		p8admin	10/21/2013, 2:03 PM	
Account 45-32832		p8admin	10/21/2013, 2:03 PM	
Really Clean 2010 Contract Agreement.doc	26 KB	p8admin	9/9/2014, 10:21 AM	

The context menu options are: Open, Preview, Properties, Download, Add to Favorites, Export, Delete, Check Out, Check In, Cancel Check Out, Link, **Add to Microsoft SharePoint**, Send Email, Send to IBM QuickFile, Version, Folders, Print, Workflow.

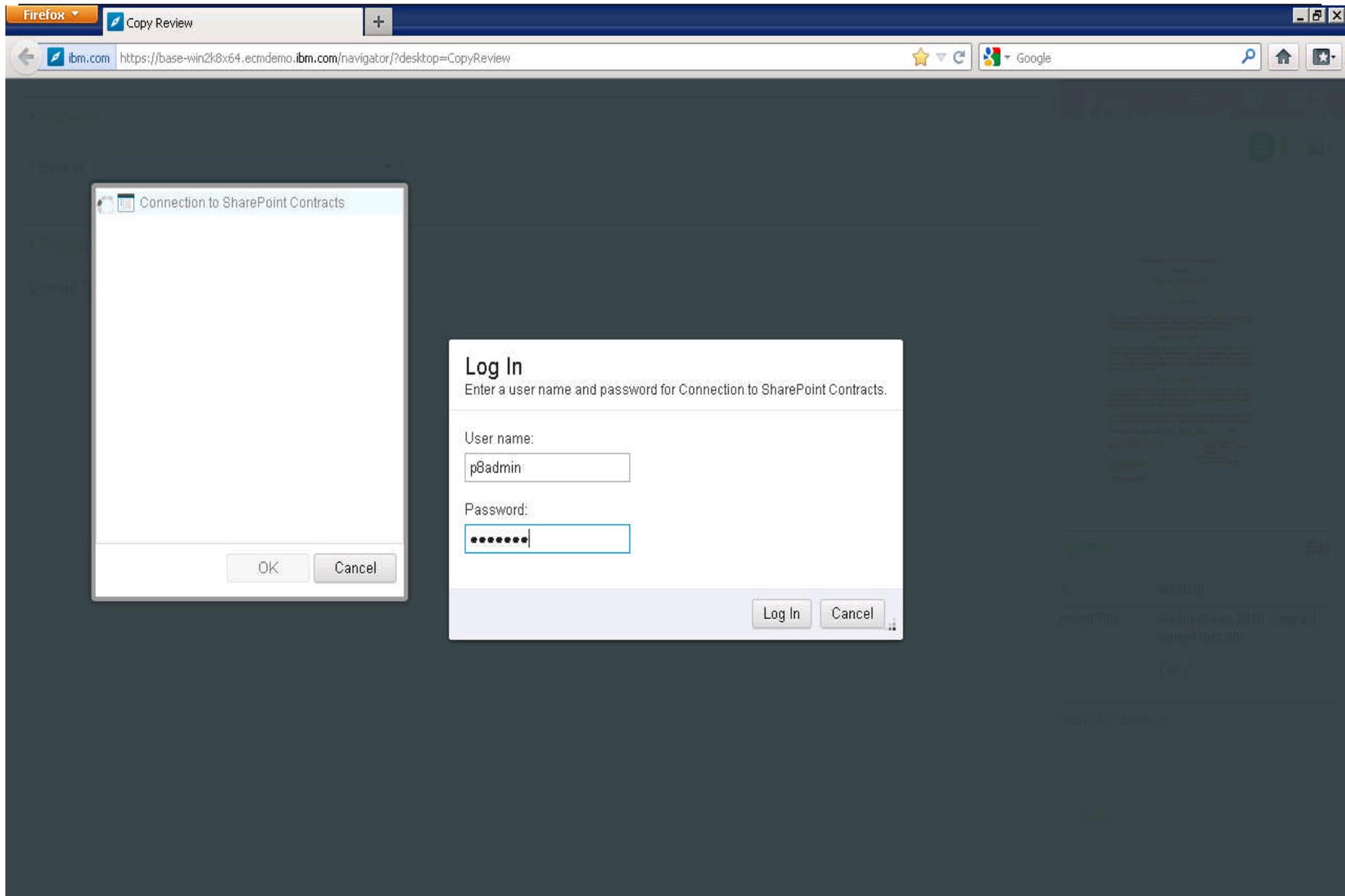
The document preview on the right shows a contract agreement with the following details:

- Class: Meeting
- Document Title: Really Clean 2010 Contract Agreement.doc
- Tier: Tier 2

System Properties

9/9/2014, 5:47 PM - The Customer Contracts folder returned 4 items.

Setting Up Integration - Desktop



Setting Up Integration - Desktop



The screenshot shows a Firefox browser window with two tabs: "Copy Review" and "Contracts - All Documents". The address bar shows the URL: `https://base-win2k8x64.ecmdemo.ibm.com/navigator/?desktop=CopyReview`. The main content area is divided into two sections:

- General:** A "Save in:" dropdown menu is set to "Contracts". Below it, the "Overwrite existing files" checkbox is checked.
- Properties:** The "Content Type" is set to "Document". The "Title" field contains the text "Copied from ICN".

On the right side of the browser, a dark sidebar titled "Add to Microsoft SharePoint" is visible. It includes a sub-header "Add to Microsoft SharePoint" with a refresh icon, a paragraph of text: "The values that you enter for the document properties can be used to find the document later.", and two buttons at the bottom: "Add" and "Cancel".

Setting Up Integration - Desktop



The screenshot shows a Firefox browser window with two tabs: 'Copy Review' and 'Contracts - All Documents'. The address bar shows the URL: `base-win2k8x64:81/sites/Focus/Contracts/Forms/AllItems.aspx`. The page is a SharePoint site titled 'Contracts' with a 'focus CORPORATION' logo. The main content area displays a list of documents under the heading 'All Documents'. The list includes two entries: 'Atec - Partner Agreement - 2012' and 'Really Clean 2010 Contract Agreement *'. The browser's address bar and the page's search bar both contain the text 'Google'.

SharePoint

System Account

BROWSE

SHARE FOLLOW SYNC

focus CORPORATION

Welcome to The Contracts Processing Site

Contracts

Home

Documents

Recent

Service Contracts

Contracts

Site Contents

EDIT LINKS

Search this site

+ new document or drag files here

All Documents Find a file

✓	Name	Modified	Modified By
	Atec - Partner Agreement - 2012	January 09	System Account
	Really Clean 2010 Contract Agreement *	About a minute ago	System Account

Cross-Repository Search



The screenshot shows a web browser window with the title 'Copy Review' and the URL 'https://base-win2k8x64.ecmdemo.ibm.com/navigator/?desktop=CopyReview'. The browser's address bar includes a search icon, a home icon, and a Google search icon. The main content area is dark-themed and contains a sidebar on the left with various icons and labels. A modal dialog titled 'Add Repository' is open in the center, with the following content:

Add Repository 

Select the repository and the search or the classes that you want to include in the search.

Repository:

Search in:

Class:

[Search options:](#) Documents, Current version

Cross-Repository Search



Firefox Copy Review
https://base-win2k8x64.ecmdemo.ibm.com/navigator/?desktop=CopyReview

Copy Review p8admin

New Search ▾
Name contains

Recent Searches

- All Deals
- EmployeeRatings
- Compare Invoices
- All policies and proced
- AllProjectDocumentsA
- SearchFolderName
- New Ad Copy
- HR Documents

All Searches

New Cross-Repository Search x

Search Scope

Add Repository Edit Repository Remove

Repository	Search Scope	Class	Object Type and Version
IBM FileNet and Connections	Entire Repository	Document (Including subclasses)	Documents, Released version
SharePoint 2013 Contracts	Entire Repository	cmis:document	Documents, Current version

Add Mapping Edit Delete

Mapping Name	Type	Repositories
No items to display		

Search

9/9/2014, 5:51 PM - 1 items were found.

Cross-Repository Search



Firefox Copy Review
https://base-win2k8x64.ecmdemo.ibm.com/navigator/?desktop=CopyReview

Copy Review p8admin IBM

New Search
Name contains

Recent Searches

- SharePoint and ECM C
- SharePoint Contracts i
- All Deals
- EmployeeRatings
- Compare Invoices
- All policies and proced
- AllProjectDocumentsA
- SearchFolderName
- New Ad Copy
- HR Documents

All Searches

SharePoint and ECM Contracts

Search Scope

Add Repository Edit Repository Remove

Repository	Search Scope	Class	Object Type and Version
SharePoint 2013 Contracts	Entire Repository	Document	Documents, Current version
IBM FileNet and Connections	Entire Repository	Document (Including subclasses)	Documents, Released version

Add Mapping Edit Delete

Mapping Name	Type	Repositories
Author	Text string	SharePoint 2013 Contracts, IBM FileNet and Connections
Created	Date	SharePoint 2013 Contracts, IBM FileNet and Connections
Editor	Text string	SharePoint 2013 Contracts, IBM FileNet and Connections
Modified	Date	SharePoint 2013 Contracts, IBM FileNet and Connections
Name	Text string	SharePoint 2013 Contracts, IBM FileNet and Connections
Title	Text string	SharePoint 2013 Contracts

Search

9/10/2014, 8:26 AM - The selected document was checked out.

Cross-Repository Search



Copy Review

SharePoint and ECM Contracts x

Search Scope

Search

Search Criteria

Search Results

Refresh Add Document Actions

Showing results for: SharePoint and ECM Contracts

	Created	Author	Editor	Modified	Name	Title
	12/17/2013, 12:58 PM	System Account	System Account	1/9/2014, 6:15 AM	Atec - Partner Agreement - 2012.doc	Atec - Partner Agreement - 2012
	9/9/2014, 5:49 PM	System Account	System Account	9/9/2014, 5:49 PM	Really Clean 2010 Contract Agreement.doc	Copied from ICN
	9/3/2013, 1:04 PM	p8admin	p8admin	9/3/2013, 1:04 PM	Brian G Catering.pdf	
	9/3/2013, 1:06 PM	p8admin	p8admin	9/3/2013, 1:06 PM	Toppings Central 2013 Contract.pdf	
	9/10/2013, 9:30 AM	p8admin	p8admin	9/10/2013, 9:30 AM	MandAApprovalWorkflow	
	9/12/2013, 9:53 AM	p8admin	p8admin	9/12/2013, 9:53 AM	HR Documents	
	10/21/2013, 10:48 AM	p8admin	p8admin	10/21/2013, 10:48 AM	ENUS601-034.pdf	
	9/13/2013, 10:37 AM	p8admin	p8admin	9/13/2013, 10:37 AM	New Employee Letter.doc	
	9/13/2013, 10:55 AM	p8admin	p8admin	9/13/2013, 10:55 AM	John Eastman Employee Letter.doc	

9/10/2014, 8:27 AM - The search returned 83 items.

Using Web Parts



The screenshot shows a Firefox browser window displaying a SharePoint site. The address bar shows the URL: `base-win2k8x64:81/sites/Focus/SitePages/Home.aspx`. The SharePoint ribbon is visible with the 'PAGE' tab selected. The 'New' button is highlighted, and its dropdown menu is open, showing the option 'Create a new page.' Below the ribbon, the 'IBM Content Navigator' is displayed, showing a file list under the 'Root' folder. The file list includes folders for Customer Contracts, Finance, HR, IBM Global Financing, IT, Images, Incoming, Invoices, Legal, Marketing, Mergers and Acquisitions, and Photos. The 'Modified By' and 'Modified On' columns are visible for each folder.

Name	Modified By	Modified On
Customer Contracts	p8admin	10/21/2013, 2:03 PM
Finance	p8admin	9/13/2013, 3:14 AM
HR	p8admin	9/23/2013, 5:31 PM
IBM Global Financing	p8admin	10/21/2013, 10:13 AM
IT	wasadmin	9/3/2013, 12:46 PM
Images	p8admin	10/22/2013, 12:31 PM
Incoming	p8admin	9/5/2013, 1:33 PM
Invoices	p8admin	10/21/2013, 2:02 PM
Legal	p8admin	9/3/2013, 11:00 AM
Marketing	wasadmin	9/3/2013, 12:45 PM
Mergers and Acquisitions	p8admin	9/11/2013, 2:02 PM
Photos	n8admin	10/22/2013, 12:22 PM

Using Web Parts



The screenshot shows a Firefox browser window displaying a SharePoint site. The address bar shows the URL: `base-win2k8x64:81/sites/Focus/SitePages/Home.aspx`. The page title is "Welcome to The Contracts Processing Sit...". The SharePoint interface includes a top navigation bar with "System Account" and a "PAGE" tab. Below the navigation bar is a ribbon with various options like "Edit", "New", "Check Out", "Edit Properties", "Rename Page", "Page URLs", "Page History", "Page Permissions", "Delete Page", "E-mail a Link", "Preview", "Draft Check", "Make Homepage", "Incoming Links", "Library Settings", "View All Pages", and "Tags & Notes".

The main content area is titled "Browse (IBM Content Navigator)" and shows a file explorer view. A dialog box titled "Add a page" is open, prompting the user to "Give it a name". The text "Work and Search" is entered in the input field. Below the input field, it says "Find it at <http://base-win2k8x64:81/sites/Focus/pages/work-and-search.aspx>". There are "Create" and "Cancel" buttons at the bottom of the dialog.

The background shows a list of folders and files in the IBM Content Navigator. The folders listed are IT, Images, Incoming, Invoices, Legal, Marketing, Mergers and Acquisitions, and Photos. The files listed are wasadmin, p8admin, p8admin, p8admin, p8admin, wasadmin, p8admin, and n8admin. The dates and times for these files are: 9/3/2013, 12:46 PM; 10/22/2013, 12:31 PM; 9/5/2013, 1:33 PM; 10/21/2013, 2:02 PM; 9/3/2013, 11:00 AM; 9/3/2013, 12:45 PM; 9/11/2013, 2:02 PM; and 10/22/2013, 12:22 AM.

Using Web Parts



The screenshot shows a Firefox browser window with two tabs: 'Copy Review' and 'Work and Search'. The address bar shows the URL: `base-win2k8x64:81/sites/Focus/Pages/Work-and-Search.aspx?ControlMode=Edit&DisplayMode=Design`. The SharePoint ribbon is visible, with the 'INSERT' tab selected. The ribbon includes options for Table, Picture, Video and Audio, Link, Upload File, Reusable Content, App Part, Web Part, and Embed Code. Below the ribbon, the 'Web Part' gallery is open, showing a list of categories on the left and a list of parts in the center. The 'Search (IBM Content Navigator)' part is selected. The 'About the part' pane on the right provides details for the selected part, including its description and an 'Add part to:' dropdown menu set to 'Rich Content'. At the bottom of the gallery, there are 'Add' and 'Cancel' buttons. Below the gallery, a navigation pane on the left shows 'Home', 'Documents', 'Recent', 'Service Contracts', 'Contracts', and 'Site Contents'. A yellow warning banner at the top of the main content area reads: 'Checked out to you Only you can see your recent changes. [Check it in.](#)' Below the banner, the 'Title' field contains 'Work and Search' and the 'Page Content' area is empty.

Using Web Parts



The screenshot shows a Firefox browser window with two tabs: 'Copy Review' and 'Work and Search'. The address bar shows the URL: `base-win2k8x64:81/sites/Focus/Pages/Work-and-Search.aspx`. The page is a SharePoint site with a navigation menu on the left including 'Home', 'Documents', 'Recent', 'Service Contracts', 'Contracts', and 'Site Contents'. The main content area is titled 'Work and Search' and contains two web parts: 'Search (IBM Content Navigator)' and 'Work (IBM Content Navigator)'. A yellow banner at the top of the content area reads 'Checked out to you Only you can see your recent changes. [Check it in.](#)'

The 'Search (IBM Content Navigator)' web part configuration panel is open, showing the following settings:

- Title:** Work and Search
- Page Content:** Search (IBM Content Navigator)
- Page Viewer:** Select whether you want to display a file, folder, or Web page in the Page Viewer Web Part.
 - Web Page
 - Folder
 - File
- Link:** To specify a link, type a URL or path. (Test Link)
 ...
- Appearance:**
 - Title:** Search (IBM Content Navigato)
 - Height:** Should the Web Part have a fixed height?
 - Yes Pixels
 - No. Adjust height to fit zone.
 - Width:** Should the Web Part have a fixed width?
 - Yes Pixels

The 'Work (IBM Content Navigator)' web part configuration panel is also visible, showing the following settings:

- Title:** Work (IBM Content Navigator)
- Page Content:** Work (IBM Content Navigator)
- Page Viewer:** Select whether you want to display a file, folder, or Web page in the Page Viewer Web Part.
 - Web Page
 - Folder
 - File
- Link:** To specify a link, type a URL or path. (Test Link)
 ...
- Appearance:**
 - Title:** Work (IBM Content Navigato)
 - Height:** Should the Web Part have a fixed height?
 - Yes Pixels
 - No. Adjust height to fit zone.
 - Width:** Should the Web Part have a fixed width?
 - Yes Pixels

Using Web Parts



Welcome to The Contracts Processing Site - Home - Windows Internet Explorer

http://base-win2k8x64:81/sites/Focus/SitePages/Welcome to The Contracts P... x

Find: farm Previous Next Options

SharePoint System Account

BROWSE PAGE SHARE FOLLOW SYNC EDIT

focus CORPORATION

Welcome to The Contracts Processing Site EDIT LINKS

Search this site

Home Documents Recent Service Contracts Contracts Site Contents EDIT LINKS

Welcome to The Contracts Processing Site

Browse (IBM Content Navigator)

Refresh Add Document New Folder Actions

Root

Name	Modified By	Modified On
Customer Contracts	p8admin	10/21/2013, 2:03 PM
Finance	p8admin	9/13/2013, 3:14 AM
HR	p8admin	9/23/2013, 5:31 PM
IBM Global Financing	p8admin	10/21/2013, 10:13 AM
IT	wasadmin	9/3/2013, 12:46 PM
Images	p8admin	10/22/2013, 12:31 PM
Incoming	p8admin	9/5/2013, 1:33 PM
Invoices	p8admin	10/21/2013, 2:02 PM
Legal	p8admin	9/3/2013, 11:00 AM
Marketing	wasadmin	9/3/2013, 12:45 PM
Mergers and Acquisitions	p8admin	9/11/2013, 2:02 PM
Photos	p8admin	10/22/2013, 12:22 PM

Using Web Parts

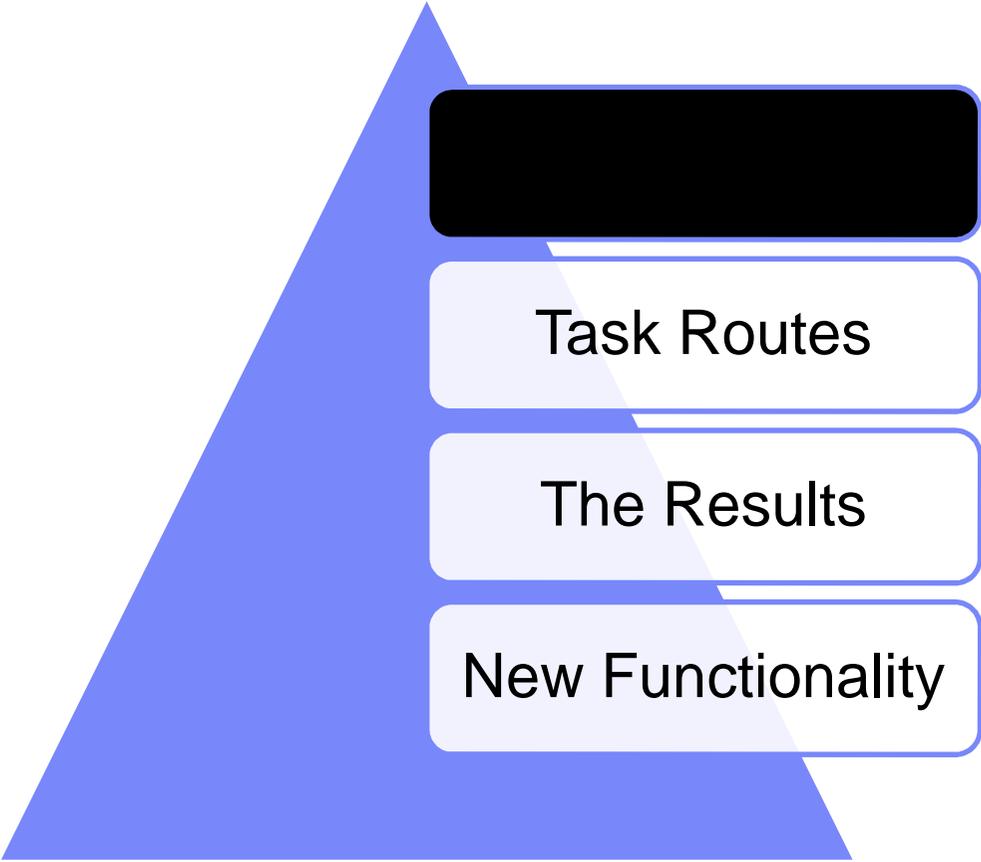


The screenshot shows a Firefox browser window displaying a SharePoint site. The address bar shows the URL: `base-win2k8x64:81/sites/Focus/SitePages/Home.aspx`. The page title is "Welcome to The Contracts Processing Site". The main content area is titled "Browse (IBM Content Navigator)" and displays a table of documents.

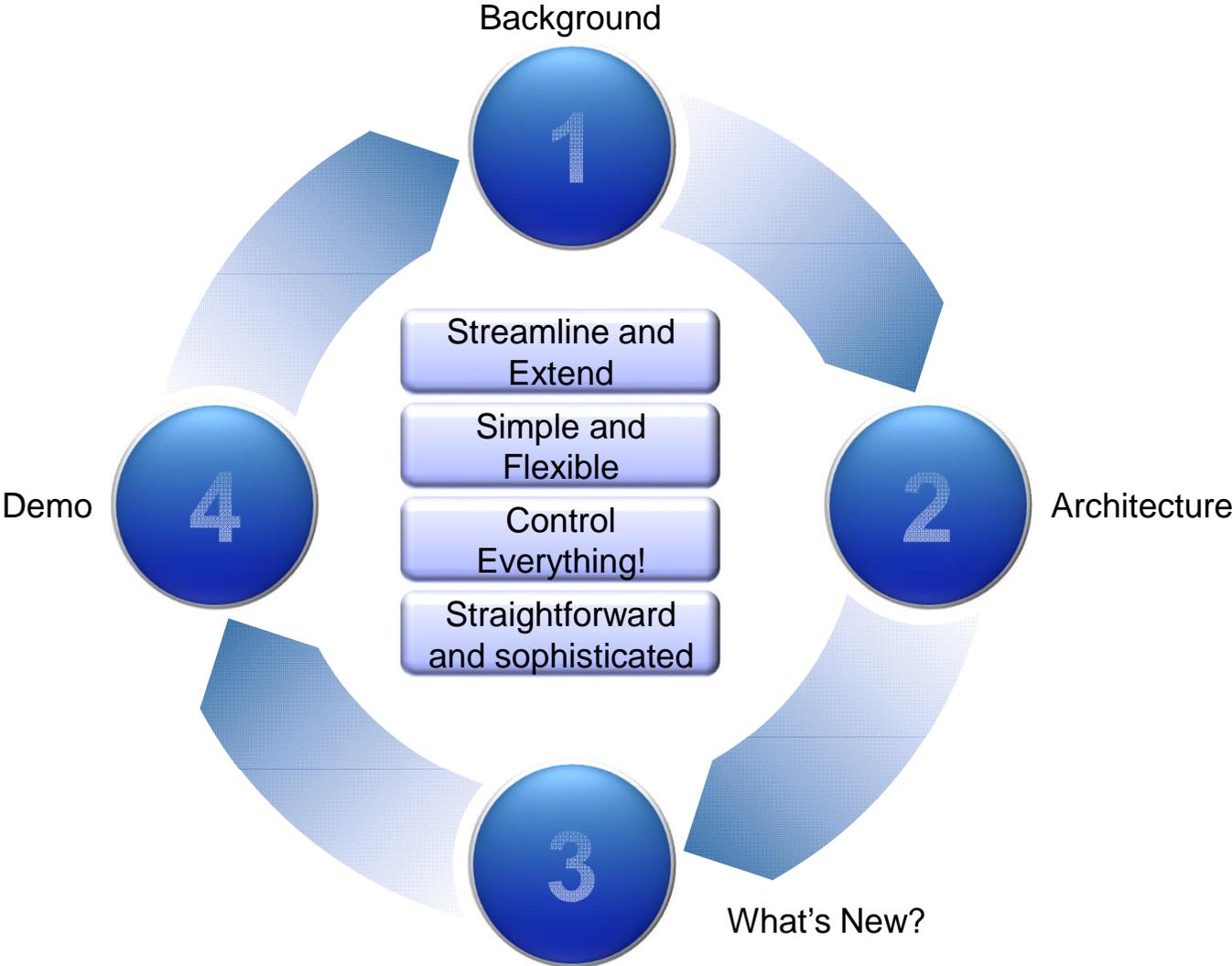
Navigation and utility links include: [Refresh](#), [Add Document](#), [New Folder](#), and [Actions](#).

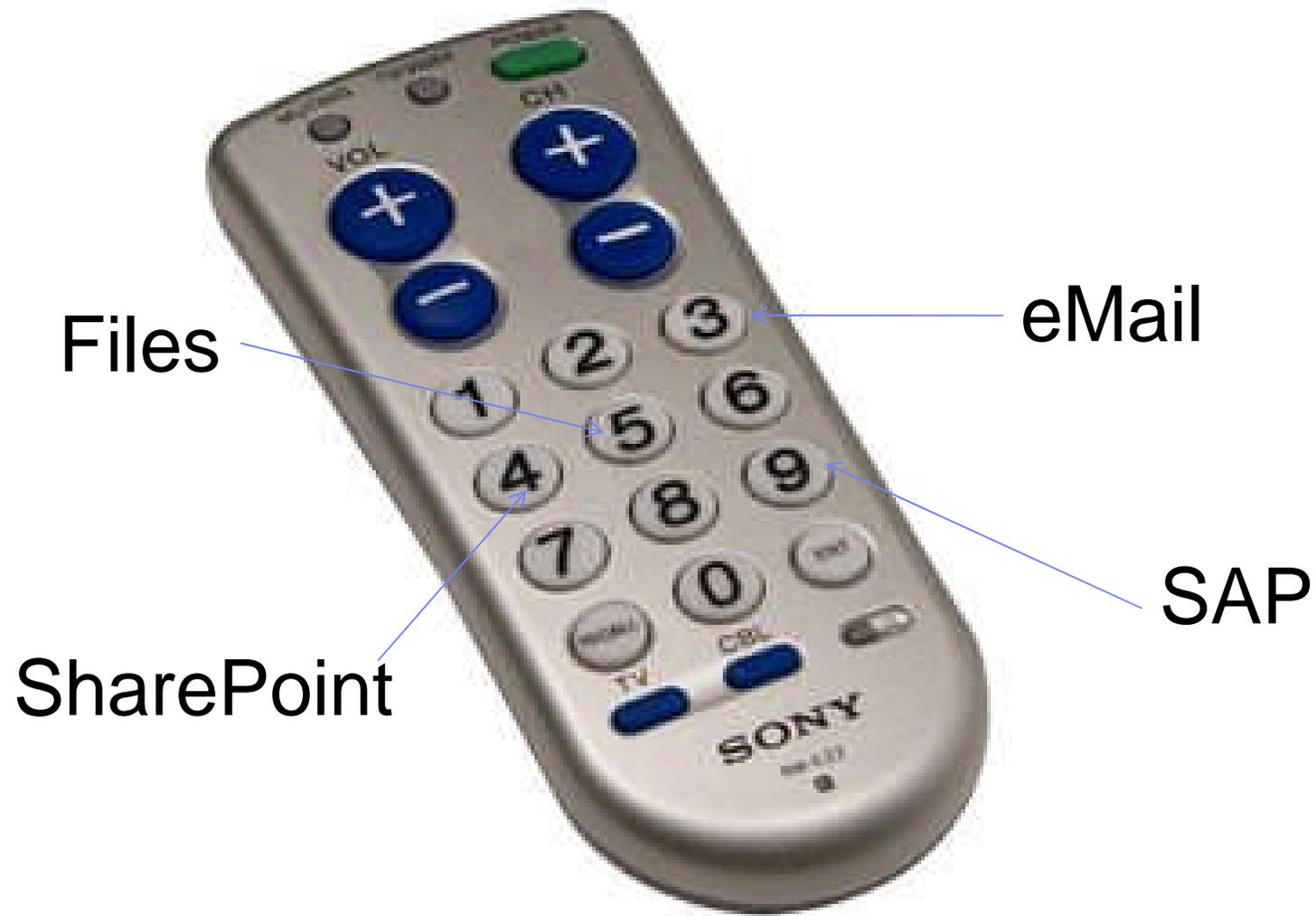
	Name	Size	Modified By	Modified On	Major Version
	Account 25-13652		p8admin	10/21/2013, 2:03 PM	
	Account 35-17232		p8admin	10/21/2013, 2:03 PM	
	Account 45-32832		p8admin	10/21/2013, 2:03 PM	
	Really Clean 2010 Contract Agreement.doc	26 KB	p8admin	9/9/2014, 10:21 AM	2

ICC for SharePoint demo



ICC for SharePoint





- "Understanding the footprint of IBM Content Collector for Microsoft SharePoint"
- <http://www.ibm.com/developerworks/data/library/techarticle/dm-1103contentcollector/index.html>

Questions?

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ICC Architecture

