



IBM Software Group

WebSphere Portal Document Manager

WebSphere Portal Server v5.1

Lotus software



ON DEMAND BUSINESS™

IBM Proof of Technology

IBM Product Introduction + Exploration

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Session Objectives

- After completing this session, you should be able to:
 - ▶ Identify Characteristics of WebSphere Portal Document Manager
 - ▶ Understand how to use WebSphere Portal Document Manager to manage your companies documents
 - ▶ Create a new Document Library and Document Folders
 - ▶ Work with existing documents and create new ones
 - ▶ Understand how to search for documents within a Document Library

PI+E

P3_1-WebSphere Portal Document Manager

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Agenda

- What is Portal Document Management?
- What is a document?
- Who are the target users?
- Document Manager Features
- Documents in Document Manager
- Document Metadata
- New Document Manager Features in WP 5.1
- New Terminology – Document Library
- New Portlet - Manage Document Libraries
- New Document Manager UI
- New UI Tree/Table Control
- Drafts
- Workflow

Agenda - continued

- Views
- Native Editor Round Trip Editing
- Document Library Bulk Import
- Usage of Document Conversion Services (DCS)
- Integration with Search Center
- Configurable Root Folder
- Integration with email
- Collaboration Components
- URL Addressability
- Active Content Filtering (ACF)
- Conversion from PCM API to Content Model API
- Rebase on JSR170
- Document Manager and Virtual Portals
- Summary

What is Portal Document Management?

Portal Document Management is a place where users can contribute, edit, view, share and search documents with others in their community by uploading files and organizing them into business relevant categories.

What is a document?

- Common perception:
 - ▶ Word or WordPro Document
 - ▶ PDF file
- Any file can be a document
 - ▶ Jpeg or other image files
- Web link, URL
- Document Manager can handle all of the above

Who are the target users?

- Business professionals
- Entry level administrative employees
- Not necessarily IT professionals, but of course they can use it too

Document Manager Features

- Provides a centralized location for documents
- User can navigate through a hierarchy of user-defined folders.
- User can navigate through documents within a folder
- Add, delete or modify folders - No restrictions on the number or depth of folders.
- Create documents using the Productivity Editors (Rich Text Editor, Presentation Editor and Spreadsheet Editor)
- Easily add documents of any format from local file system
 - File chooser dialog for easy add
- Edit document metadata and contents (requires appropriate editor support)
- Provides built-in methods for tracking changes and comments from members of the work team.

Documents in Document Manager

- Document Manager can store multiple file types, including:
 - ▶ Text and RTF documents
 - ▶ Presentation documents
 - ▶ Spreadsheets
 - ▶ PDF files
 - ▶ Image files (such as JPEG or GIF)
 - ▶ HTML files

Document Metadata

- Metadata for each document :
 - ▶ Title
 - ▶ Description
 - ▶ Filename
 - ▶ Language
 - ▶ Date created and last modified
 - ▶ Creator and user who last modified
 - ▶ Send a link with comments
- Metadata is not customizable

New Document Manager Features in WP 5.1

- New Portlet – Manage Document Libraries
- New UI
- Drafts
- Views
- Native Editor Round Trip Editing
- Document Library Bulk Import
- New usage of Document Conversion Services (DCS)
- Search Enhancements
- Configurable Root Folder
- Uses Collaboration Components
- URL Addressability
- Active Content Filtering (ACF)
- Uses JSR 170 Content Repository

New Terminology – Document Library

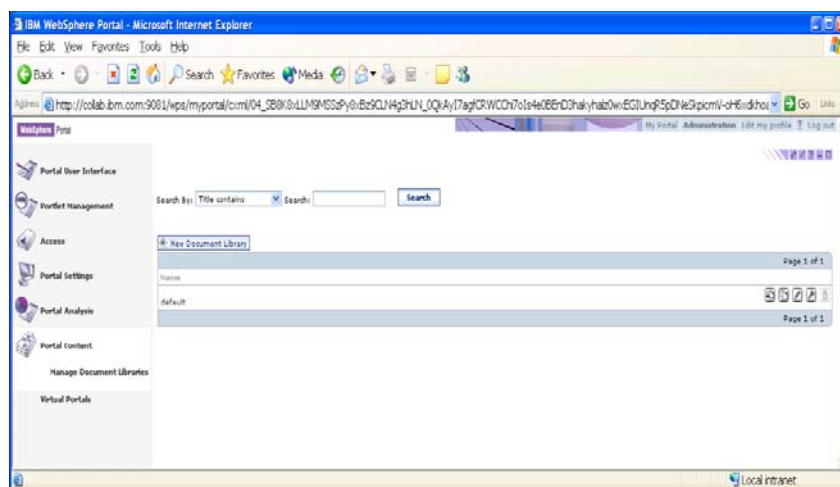
Document libraries are a collection of documents intended for a certain user group (i.e. department).

- Scoping is important when designing the types and numbers of document libraries.
 - ▶ One Document Manager portlet points to one and only one document library – use the configuration page
 - ▶ Same for search within Document Manager
 - ▶ Portal search will cross document library boundaries (covered later)

New Portlet - Manage Document Libraries

- New Portal Administration portlet used to manage document libraries
- Found in Portal Administration page, under Portal Content
- All document library create, edit and delete function moved from Document Manager configuration panel to Manage Document Libraries portlet.

Manage Document Libraries Portlet - continued



Add a new Document Library

The screenshot shows the IBM WebSphere Portal Administration console in Microsoft Internet Explorer. The left sidebar contains navigation links: Portal User Interface, Portlet Management, Access, Portal Settings, Portal Analysis, Portal Content, Manage Document Libraries (selected), and Virtual Portals. The main content area displays the 'Add a new Document Library' form. The form includes the following fields and options:

- Document library name:** Portal V5.1
- Description:** This library contains documents related to Portal V5.1
- Versioning:** ☒ Enable document versioning
- Approvals workflow:** ☒ Enable workflow
- Approver:** appDocReviewer
- Document locking:** ☒ Enable document locking
- Document library language:** English
- ☐ Prohibit library from being deleted

At the bottom of the form are 'OK' and 'Cancel' buttons.

Add a new Document Library - continued

The screenshot shows the IBM WebSphere Portal Administration console in Microsoft Internet Explorer. The left sidebar is the same as in the previous screenshot. The main content area displays a confirmation message: 'The new document library has been successfully created.' Below the message is a search bar with 'Search By: Title contains' and a 'Search' button. A table titled 'New Document Library' shows the newly created library:

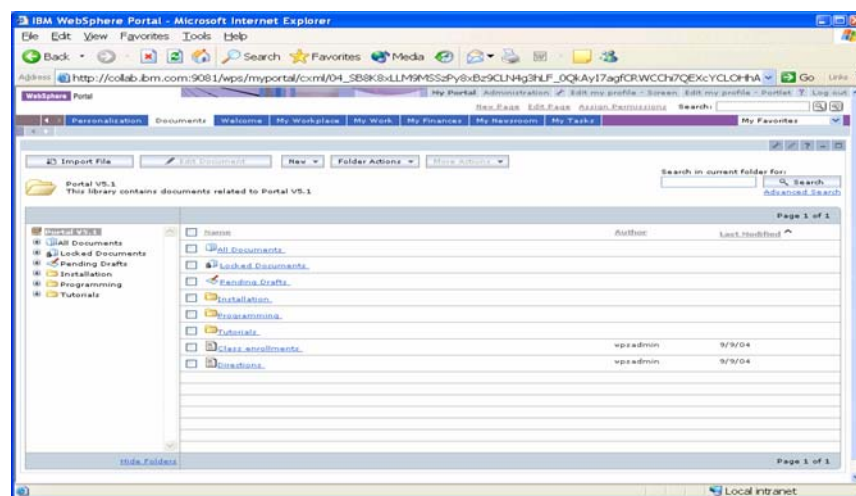
New Document Library		Page 1 of 1
Name	Portal V5.1	
	default	

At the bottom of the table is a 'Page 1 of 1' indicator. The status bar at the bottom of the browser window shows 'Done' and 'Local intranet'.

New Document Manager UI

- Explorer-type look
- Tree control can be configured on and off
- New way of working with document
 - ▶ Select one or more files and work with them
 - ▶ No more icons next to documents

New UI Tree/Table Control



Drafts

- Users can save documents as private drafts
- Nobody else can see the draft
- Draft becomes visible to others when author submits the document for review
- Review implies a workflow process – see next slide

Workflow

- Only drafts use Workflow in Portal 5.1
- If workflow turned on and you submit a draft,
 - Document remains invisible until approved
- If workflow turned off and you submit (publish) a draft,
 - Draft immediately replaces existing document
- Document deletion no longer involves workflow
- Choice of workflows:
 - Will have WebSphere Process Choreographer support in later 5.1 fixpack.
 - Currently uses built-in simple workflow
 - No customized workflows.
- To use workflow, you need to enable security.

Views

- Users can create views
- Views are like saved queries, for example, "all documents authored by wpsadmin"
- Views show up in the tree/table, similar to folders but have special icons
- Four built-in views:
 - ▶ All documents
 - ▶ Locked documents (shows documents locked by current user)
 - ▶ Pending drafts (shows all drafts authored by current user)
 - ▶ Submitted drafts (submitted for review)
- Views can be used in place of the Receive Updates feature of Portal 5.0

Native Editor Round Trip Editing

- Requires the Document Manager browser plug-in
 - ▶ Plug-in can be enabled/disabled in configure mode
 - ▶ If disabled, round trip editing and creating new non-ODC documents are also disabled
- When the user asks to edit a non-ODC document
 - ▶ Document is downloaded to a temp location on the users computer
 - ▶ Application associated with document mime type is launched on document
 - ▶ Plug-in detects when document is saved
 - ▶ Saving document on Document Manager edit panel saves changed document from user's computer back into Document Manager.

Document Library Bulk Import

- Found in Manage Document Libraries portlet
- Ability to load a set of folders and documents into a document library
- Requires the Document Manager browser plug-in, if the plug-in is disabled, the bulk import is disabled
- Point the browser plug-in at a directory tree on user's computer and the plug-in will upload all of the folders and documents in the tree into the document library

Usage of Document Conversion Services (DCS)

- DCS is used in two places within the Document Manager application:
 - ▶ Provides a pre-view (HTML) version of a document
 - DCS will provide an HTML rendering for over 250 file formats (except for PDF documents)
 - HTML version of the document is displayed when the user wants a preview of the document
 - ▶ Provides conversion between file formats
 - For example, DCS can convert a Productivity Editor Rich Text Editor file into a Microsoft Word Document.
 - Conversion is a user action, user must explicitly ask for a conversion. Converted document replaces the existing document in the Document Manager document library.

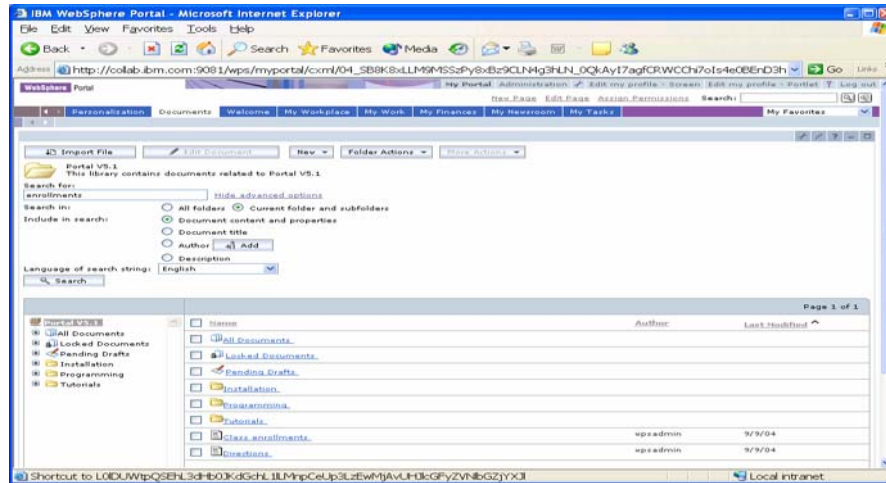
Some example of conversion loss

- Page breaks (not part of html)
- Platform-specific such as OLE embeddings
- Only the first worksheet of a workbook is converted
- Embedded sound clips
- See infocenter for more information

Integration with Search Center

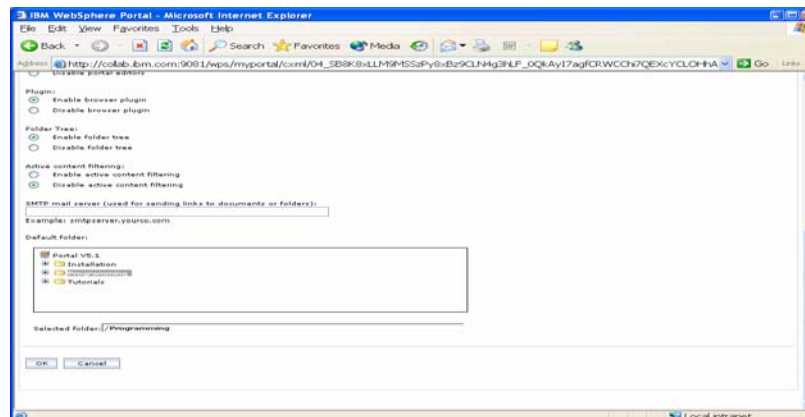
- Document libraries will be visible and searchable through the Portal Search Center application
 - ▶ Document libraries are registered with the Search Center
 - ▶ Search Center shows user list of document libraries that are accessible to the user
 - ▶ Search Center asks Document Manager to search document libraries in response to user search request
 - ▶ Document Manager executes search request through Content Model API (not a public API)
 - ▶ Document Manager returns list of search results from searching document libraries
 - ▶ Search results contain a URL back to a Document Manager portlet to display the document

Search screen

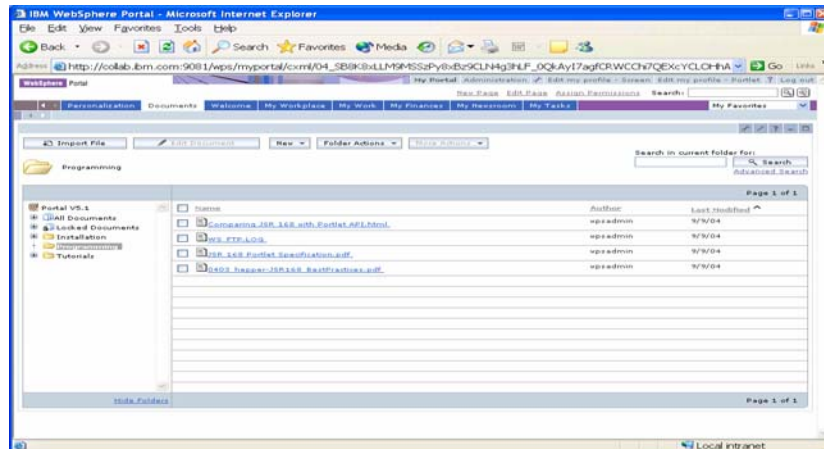


Configurable Root Folder

- Allows admin to set a default starting folder for this portlet



Configurable Root Folder example



Integration with email – IBM Common Mail

- Replaces WP 5.0 mailbox portlet
- Compose, receive, and send e-mail using either a Web browser or wireless phone.
- Retrieve mail from either a POP3 or IMAP mail server.
- View many file formats as HTML read only versions from your browser without requiring any additional software
- Load and save attachments to and from Document Manager
- Two modes
 - ▶ Basic - receive e-mail, send e-mail with attachments, and use folder support with IMAP protocol. The basic mode can be used on all browsers supported by the portal.
 - ▶ Advanced – use the Document Manager integration, the Document Conversion Services, and the Rich Text Component. Only available on IE 5.5 and 6.0, and Mozilla 1.3.

Collaboration Components

- People Picker: Common component for selecting users from the user directory (LDAP, etc).
- People Awareness: Any user name displayed in the UI shows the user's status and provides options for communicating with that user.

People Picker

- Allows user to select a user or users from the user catalog
- People Picker is an LWP collaboration component that has been moved into Portal base.
- Usage examples:
 - ▶ View all documents by a particular author (user)
 - ▶ Add a user for review

People Awareness

- People awareness support makes every user shown in the Document Manager UI a “live” user:
 - User name looks like a URL and has an icon showing current online status (active, away, do not disturb, etc)
 - Dropdown menu of choices available based on the online status
 - Open chat
 - Send an e-mail
 - Displays phone number
 - Etc.
- Usage example:
 - Document locked or changed
 - User is online
 - Start a chat – ask user to unlock the document, ask about recent changes

URL Addressability

- All documents, folders and views displayed in the Document Manager UI can be bookmarked
- Right click on a document, folder, or view and you can save the URL to the system clipboard (Copy Shortcut) and paste it into an instant msg, e-mail it to another user, etc.
- If WAS security is off and user isn't logged into Portal:
 - Clicking on URL takes user to Portal login
- If WAS security is on and user isn't logged into Portal:
 - Clicking on URL takes user to Portal login, when they login they are redirected to Document Manager and the document, folder or view is displayed
- If user has a Portal session up, user is redirected to Document Manager and the document, folder and view is displayed

Active Content Filtering (ACF)

- ACF removes potentially harmful code from HTML before it is sent to the browser.
- Enable by turning on option in Document Manager Configuration Panel (disabled by default).

Active content filtering:

☐ Enable active content filtering

☒ Disable active content filtering

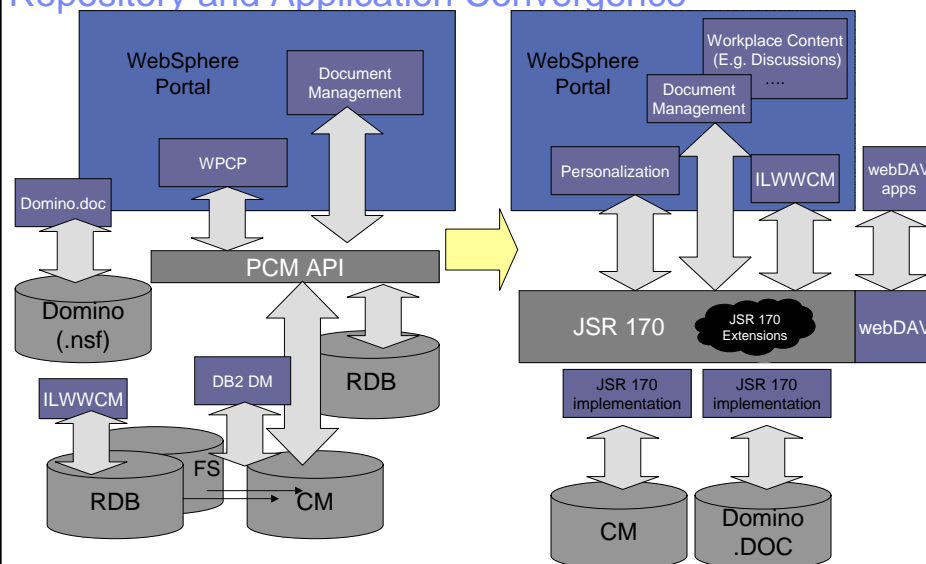
Repository Convergence - JSR 170

- The Java Community Process (JCP) is a mechanism for standardizing the java platform through Java Specification Requests (JSR)
- JSR 170 is a proposed API to standardize access to content
- The major content vendors are participating in the development of the specification
- The effort to define this standard started in April 2002
- The specification has been through a public review and is nearing completion

Repository Convergence - JSR 170

- Content Repository API for Java™
- The specification enables the development of content based applications that can be deployed on top of a number of different underlying repositories
- Specifies an API and information model for
 - Node types
 - Links
 - Versioning
 - Search
 - Transactions
 - Locking
- More information at
 - <http://www.jcp.org/en/jsr/detail?id=170>

Repository and Application Convergence



Document Manager and Virtual Portals

- Document libraries are not scoped to virtual portals
- However, Document Manager portlets are scoped to virtual portals
 - In one Virtual Portal, can have many pages pointing to different document manager libraries
 - In another Virtual Portal, entirely different set up pages pointing to other document libraries.
- So you can effectively share or not share document libraries across Virtual Portals.

Session Summary

- Now that you have completed this session, you should be able to:
 - Identify Characteristics of WebSphere Portal Document Manager
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Lab Exercise

- Create and Configure a Document Library
- Create Folders for the new Document Library
- Import Existing Documents
- Create New Documents using the Portal Productivity Components
- See how to Search for Documents