IBM Content Navigator
Overview and Architecture

IBM Content Navigator

OVERVIEW

Search

Sam

Focus Corp Finance

- Focus Corp Finance
  - Customer Contracts
    - Account 15-18173
    - **Account 25-13652**
      - Reference material
    - Account 35-17232
    - Account 55-23523
    - Account 65-37433
  - Emails
  - Invoices
    - Processes
    - Reference material
  - Photos
  - Presentations
  - Templates
  - Valuations
  - Working
    - Images
    - Misc

Refresh | Add Document | New Folder | Check In | Check Out | Properties | Actions

Focus Corp Finance ▸ Customer Contracts ▸ Account 25-13652

	Name	Size	Modified By	Modified On
	Reference material		P8Admin	2/7/2012 4:09 PM
	Atlanta TEC - Updated Contract	473 KB	rhowarth	10/20/2011 12:50 PM
	Atlanta TEC Capital Lease Contract.pdf	71 KB	rhowarth	10/19/2011 3:20 PM
	Atlanta TEC Computer Hardware Contract.pdf	473 KB	rhowarth	10/19/2011 3:20 PM
	Atlanta TEC Invoice.doc	58 KB	rhowarth	10/19/2011 3:21 PM
	Atlanta TEC Midwest Lease Agreement.pdf	67 KB	rhowarth	10/19/2011 3:21 PM
	Atlanta TEC.ppt	1.1 MB	rhowarth	10/19/2011 3:21 PM

IBM Content Navigator

Atlanta TEC Computer Hardware Contract

March 2nd 2010
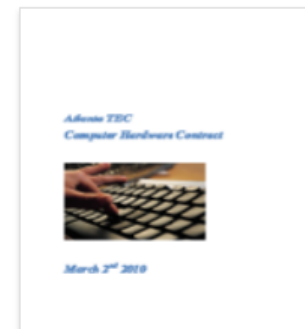
Properties

Class:	Contract
Document Title:	Atlanta TEC - Updated Contract
Authoring Division:	Sales
Type of Document:	Long Term Contract
Review Status:	Ready for review
Target Agreement Date:	10/4/2011 11:00 PM
Agreement Date:	10/18/2011 11:00 PM
Governing Law:	Arkansas
Law Firm:	Butler McCabe & Ruger
Parties:	Atlanta TEC
Sectors:	Computer Hardware

▸ System Properties

IBM Content Navigator
ECM User Experience

IBM Content Navigator is a collaborative and mobile content experience

- Access to documents anywhere
  - FileNet Content Manager
  - IBM Content Manager
  - Content Manager OnDemand
  - CMIS (tech preview)
  - ICA text search

- Desktop and mobile
  - Browser application
  - iOS mobile application

- Benefits
  - Business user access to all documents
  - Common navigation and terminology regardless of source and workstation environment

ECM UI development framework

- **Build on open standards**
  - Dojo, JavaScript, HTML5, CSS, Java …

- **Visual components**
  - Use in multiple containers

- **Extensible and pluggable**
  - ECM and third party

- **Consistency**
  - IBM OneUI OOTB look and feel

- **Benefits**
  - Change or extend Navigator UI
  - Rapid ECM enablement of other environments (e.g. Case, Portal, Sharepoint,…)
  - Cross ECM product adoption over time
  - OneUI promotes interoperability across IBM solutions in the same desktop
  - Developer skills accessible

dōjō

http://dojotoolkit.org/

Overview: High-level support matrix

- Content Manager 8.4.2 and 8.4.3

- FileNet P8 5.0 and 5.1

- Content Manager OnDemand 8.5

- CMIS

- Websphere 7 and 8 64-bit

- WebLogic 11g 64-bit

- Firefox 10 ESR, Internet Explorer 8/9 and Safari 5.1

- Windows XP, Vista and 7

- Mac OSX 10.6 and 10.7

- For more information: http://www.ibm.com/support/docview.wss?uid=swg27024958

What do you need to deploy to be productive with Navigator?

- P8
  - Navigator for end users
  - Workplace XT or Workplace for application tools
    - E.g. process design, entry templates creation, search designer for legacy searches

- CMOD
  - Just Navigator

- CM8
  - Just Navigator

IBM Content Navigator

CAPABILITY WALKTHROUGH

# Content Navigator favorites and browse

- Favorites
  - Personal frequently access documents, folders, searches and teamspaces

- Browse
  - Access the root folder and subfolder tree of both CM8 and P8
    - Global view of repository organization
    - Drag and drop from folder to folder
   - Drag and drop from desktop to folder

- Document information
  - A "quick view" of the document and its context
  - View thumbnail and document properties
    - Many document types (Office, PDF, Image,…)


Favorites

Browse

Doc Info
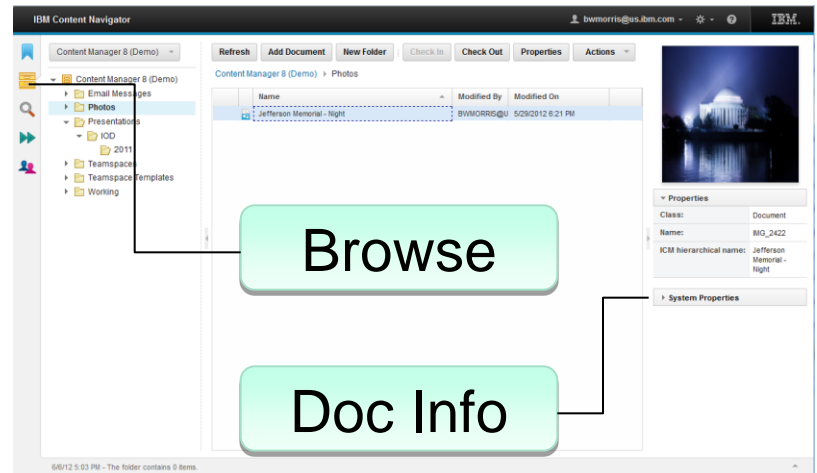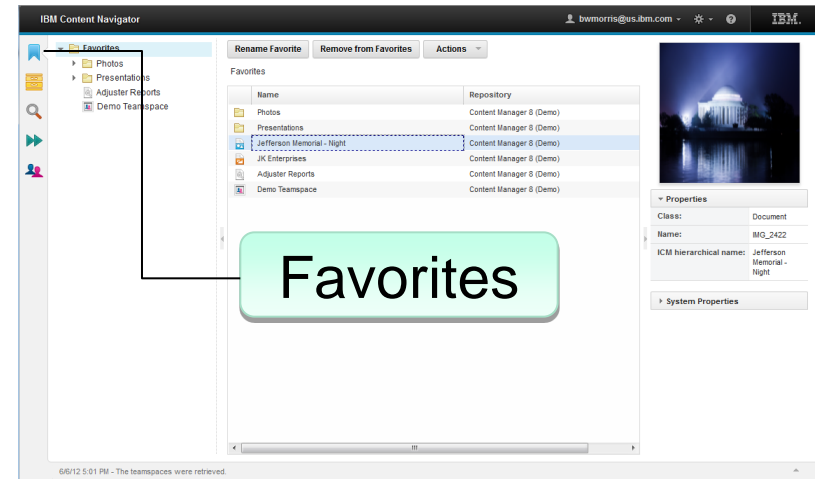
Document viewing previewing and annotating

- Multi document tabbed viewer
- Side by side and top and bottom views
- Navigate a list of documents from the viewer
- E.g. a folder contents or search result
- Configurable viewer options
  - Seamlessly uses the correct viewer for each document type
  - OOTB options for each repository
  - CMOD transform to PDF
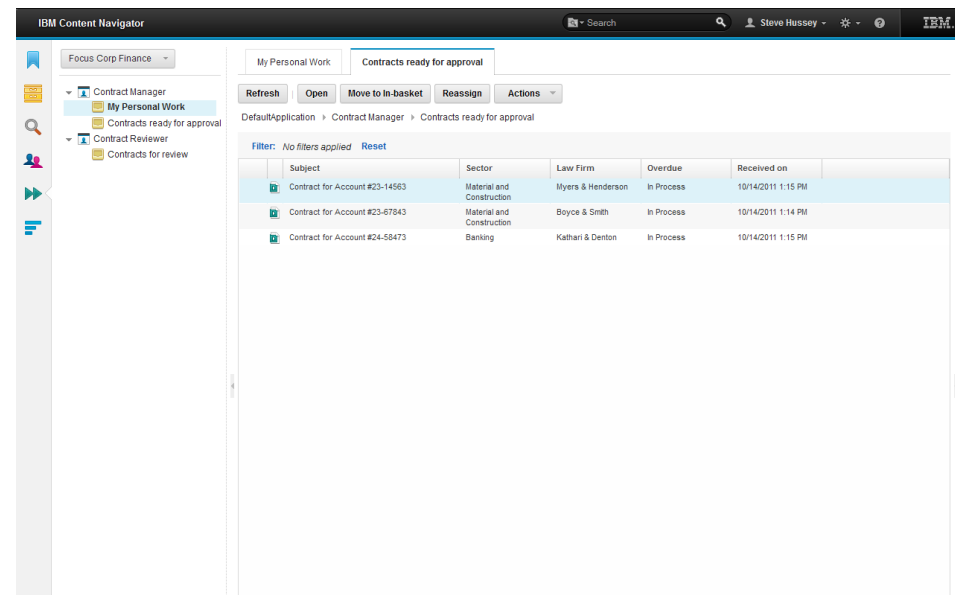 - Preview
- Third party viewer plugins
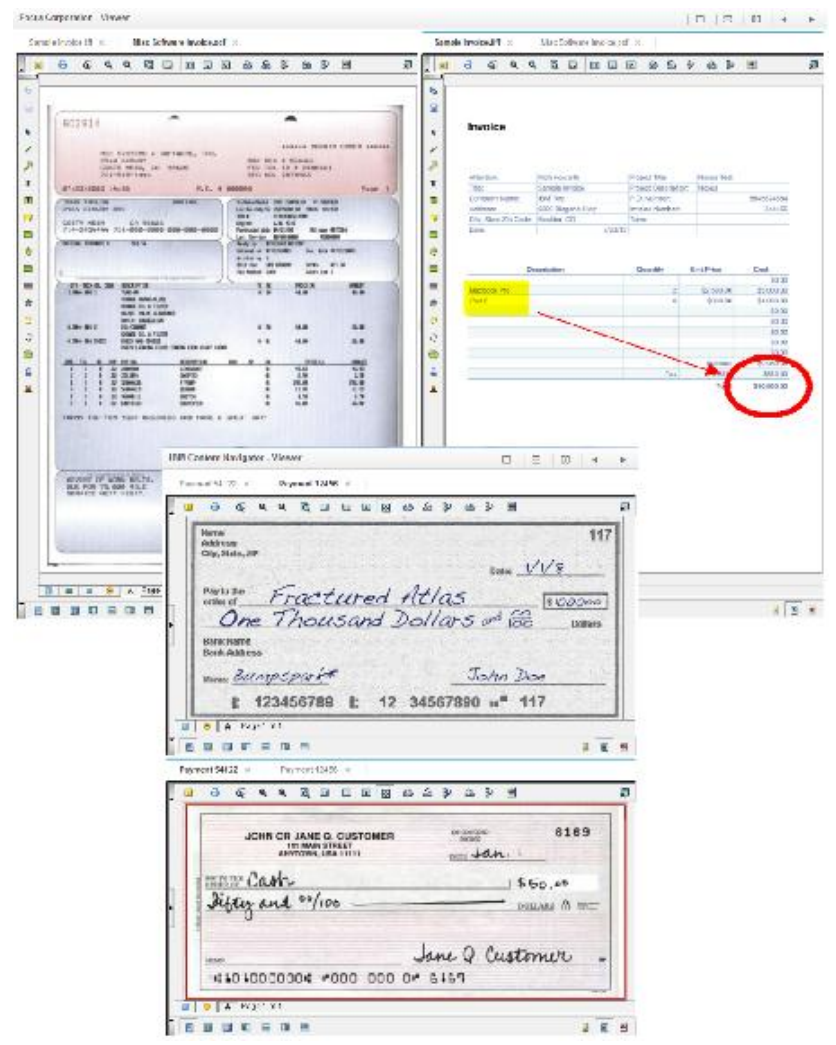
Content Navigator search - CM8/P8

- **Saved searches list**
  - Users can access search templates or recently opened search templates

- **Search builder**
  - A search builder allowing you to build search templates from object classes and item types

- **Sharing searches**
  - Creators and owners of search templates can assign security to search templates to determine who can view and edit search templates

- **Text search**
  - Full-text search is supported using CSS and LCSE text search on P8 and NSE and Oracle text search on CM8.
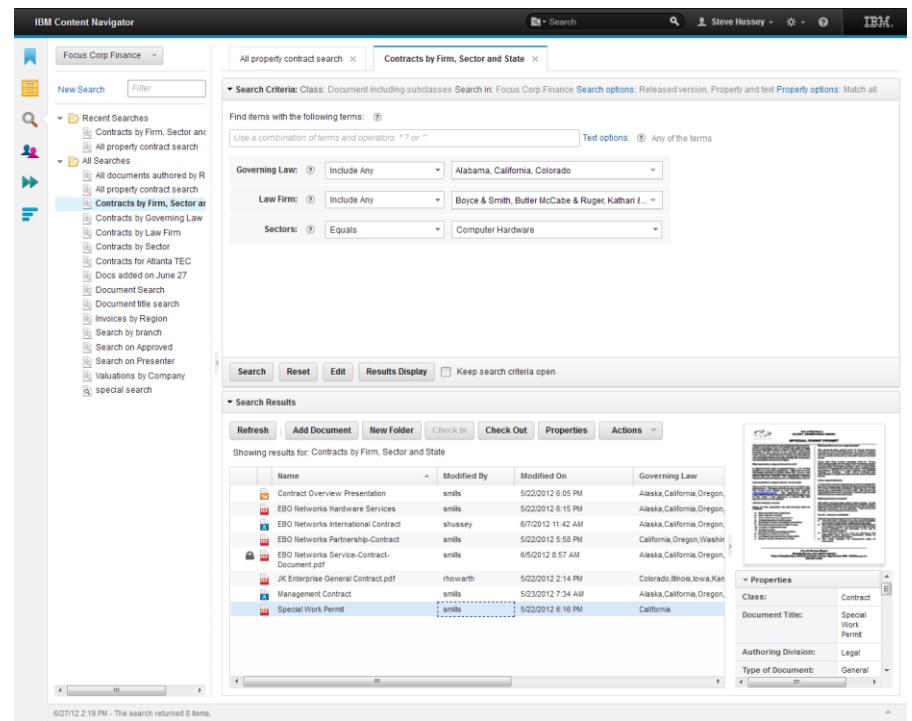
Content Navigator workflow

- Provides a view into P8 workflows

  - Supports Application Spaces Process Roles and filtered In-baskets

  - OOTB Content Navigator Launch and Step processors

  - Supports launching workflows though Workflow Subscription mechanism

- Provides a view into CM Doc Routing workflows.

  - Supports Worklist selection and work items display

  - Work items have standard workflow actions for doc routing

  - Work Items also expose standard authoring actions

IBM Content Navigator

BUSINESS SELF PROVISIONING

Business self provisioning

My Documents replacement

Quarterly and annual business reviews

Events and conferences

Standard operating procedures

Contracts/ vendor management

...

Teamspace

# Content Navigator teamspaces

- Collaborative document management for a project or team
    - Folder structure for each project
    - Selected document types for authoring
    - Selected searches for supporting information
    - Documents and templates for your project
    - Members assigned to project roles
- Benefits
    - Business driven project/team management
    - Teamspace for each project and its team
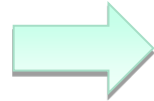   - Repository taxonomy and rules still apply
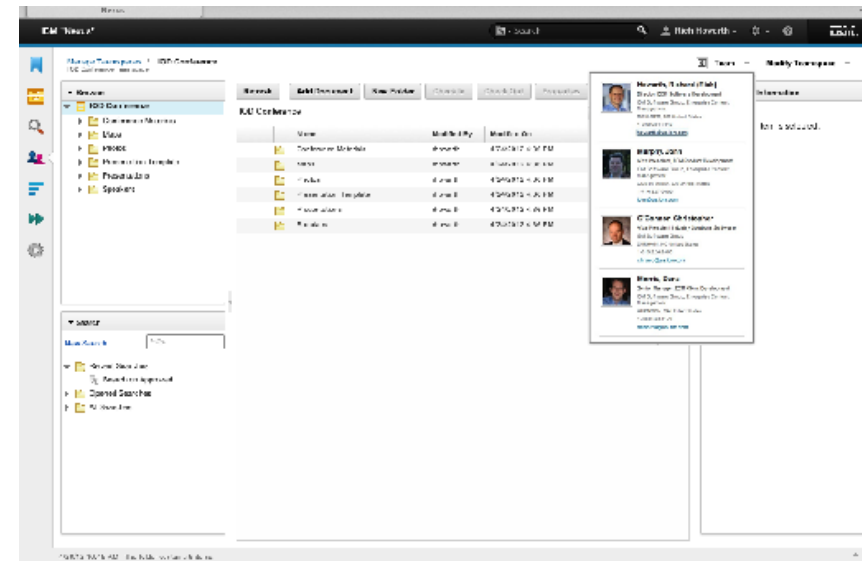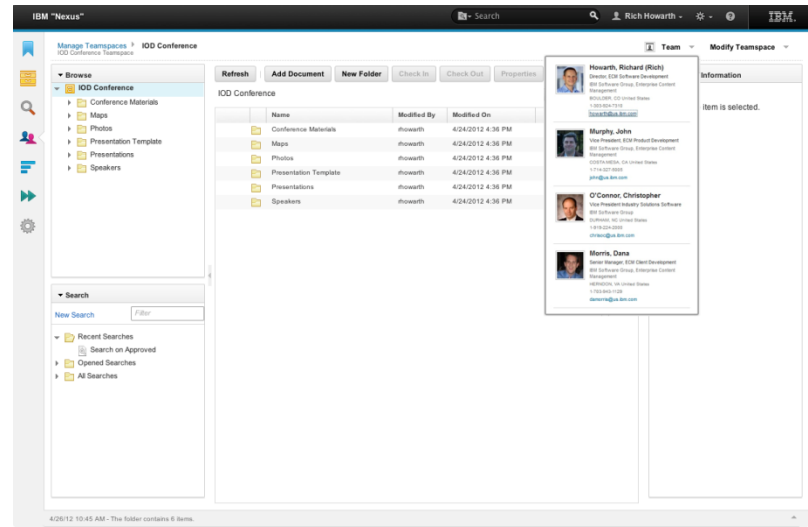
Business self provisioning
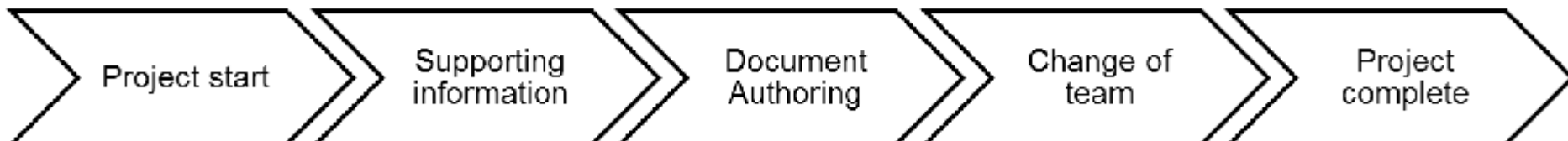
Template
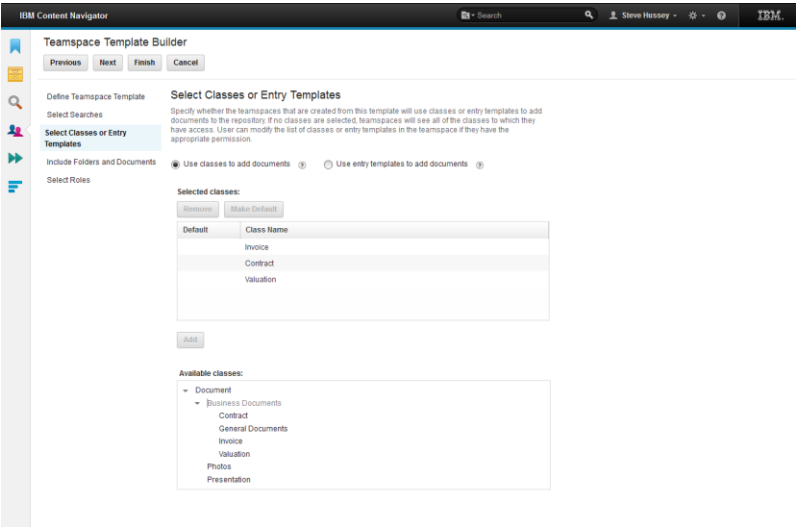
Teamspace

Deploy in minutes

Accelerator for projects
- Document classes
- Searches
- Folders
- Reference documents and templates
- Roles

Personalized for your project
- Selected document classes
- Selected searches
- Changed folder structure
- Documents for your project
- Add members of roles

Project start	Supporting information	Document Authoring	Change of team	Project complete
• Select teamspace template • Configure for your project • Add existing documents • Select initial team members • Assign roles	• Teamspace searches give participants access to supporting documents • e.g. Templates, policies and procedures, reference information	• New documents authored using types defined by the teamspace • Teamspace roles simplify new document and folders security • Teamspace folder structure guides consistent organization • Team members' rights constrained by their role in the teamspace	• Recruit additional team member into the project roles • Remove participants who leave the project or complete their participation	• Publish final deliverables outside of the teamspace

# Teamspaces and the repository taxonomy

- Documents and folders are managed in the repository
  - Repository document classes and items types are used for all folders and documents
  - All business processes, records and retention rules which apply to the repository apply to teamspaces too
  - **Teamspace folders are hidden from repository level browsing**

- Benefit
  - Teamspaces are not silos of information
  - Teamspaces obey corporate taxonomy rules
  - Documents can participate in many teamspaces and wider business processes

IBM Content Navigator

ICA ENTERPRISE SEARCH

Navigator/ICAwES functional integration

- Provides enterprise search integration using IBM Content Analytics (ICA)

- Built as a ICN plug-in
  – Type-ahead
  – Synonyms
  – Term/"hit" highlighting
  – Thumbnails
  – Navigation/facet search
  – Cross-repository search
  – Search documents, multiple repositories and other sources
  – Repository document actions (check-out, send-to, favorite, …)

- Limited use license of ICA included allowing search collections for P8 and CM8

- Full capability supported if ICA license purchased
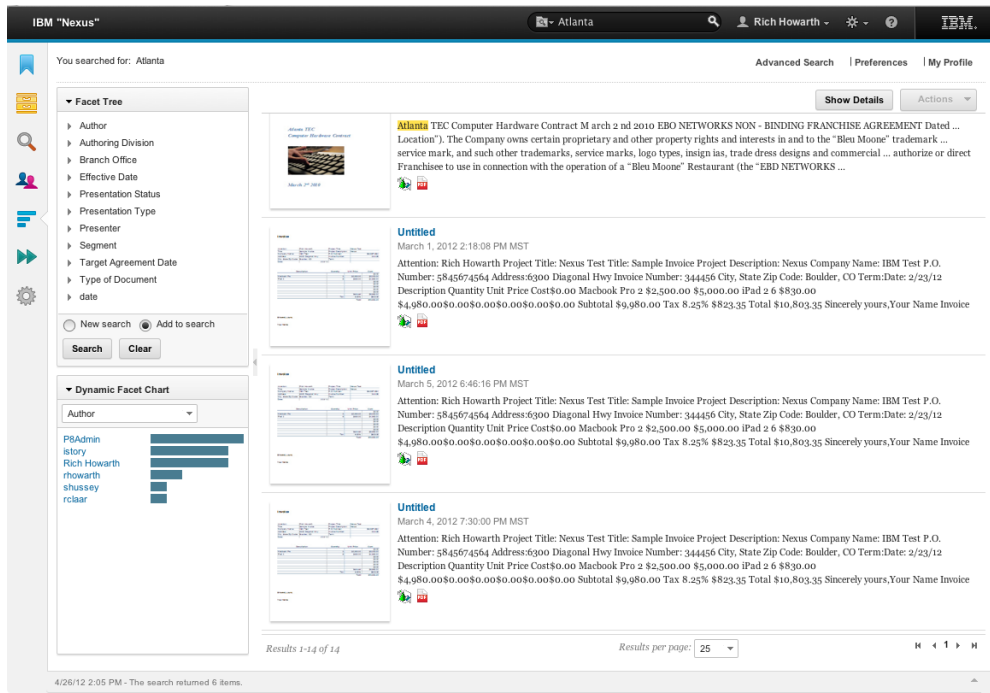
Note: ICA search collection scalability guidelines must be observed when building collections for large ECM repositories. These are available in the ICA community

Focus Corporation

shussey

You searched for: application

Advanced Search | Preferences | My Profile

application	50
Appropriate	20
Approved	5
approval	2
applicable	1
apply	1
April	1

Show Details | Actions

Open
Preview
Download
Delete
Properties
Check Out ▶
Check In
Cancel Check Out
Send Email ▶
Launch Workflow
Add to Favorites
Folders ▶
More Actions ▶

▼ Facet Tree

▼ authoringdivision
☐ Finance (1)
☐ Sales (1)
☐ Legal (1)

▼ branch
☐ New York City (2)
☐ Las Vegas (1)

▼ date
▶ ☐ 2011 (38)
▶ ☐ 2012 (9)

▼ region
☐ Northeast (2)
☐ Southwest (1)

○ New search ● Add to search

Search   Clear

EBO NETWORKS.docx
April 17, 2012 7:08:28 AM Pacific Daylight Time

... BETWEEN(1)SLOUGH TRADING ESTATE LIMITED (Co... 184323) whose registered offi...
WHEREBY IT IS AGREED as follows:-Definitions and Interpretation"Application"means the full detailed ... application
submitted by and at the cost of the Tenant to the appropriate local planning authority in ... in the form of Annexure
Alter"means the licence recording the Tenant's Works such licence to be in the form ... Annexure 5"Other Rent"mea...
as rent pursuant to the Lease other than the Rent"Planning Agreement ... planning consent obtained by the Tenant ...
Application"Power Supply Agreement"means the agreement ... nine months from and including the Completion Dat...
Rent and the Completion Date in respect of the Other ...

JK Enterprises Agreement.doc
October 19, 2011 3:23:37 PM Pacific Daylight Time

IBM JK Enterprises Agreement Dated: _____Location:Franchisee:Effective March 2, 2008 EBD NET
AGREEMENT INDEX Section Page 1.SCOPE AND PURPOSE OF AGREEMENT 1 2.THE EBD NETWORKS MARKS AND SYST
4.SITE DEVELOPMENT 4 5.IMPROVEMENTS, FIXTURES AND EQUIPMENT 6 6.FEES, TAXES AND OTHER CHARGES 8
REPORTING, BILLING AND PAYMENT 10 8.REGIONAL ADVERTISING AND MARKETING 13 9.INSURANCE AND INDEM...
10.VENDING MACHINES 16 11.COMPLIANCE WITH MANUAL AND WITH SYSTEM STANDARDS 16 12.RESTAURANT MAINTENANCE AND
REPAIR 19 13.HOURS OF OPERATION 20 14.PERSONNEL STANDARDS 20 15.INSPECTIONS 21 16.TRAINING 21 17.ASSIGNMENT 22
18.DEFAULT AND TERMINATION 29 2 19.RIGHTS AND OBLIGATIONS UPON TERMINATION 32 20.RIGHTS TO A SUCCESSOR
FRANCHISE 33 21.PROPRIETARY RIGHTS ...

▼ Dynamic Facet Chart

authoringdivision ▼

Finance	▬▬▬
Sales	▬▬▬
Legal	▬▬▬

ICA Text Search
•Search term stemming
•Thumbnails and dynamic summary
•Facets for result drill down
•Search result analytics
•ECM actions for managed documents

EBO N...
Octob...

IBM ...
AGRI...
4.SIT...
REPO...
10.V...
REPA...
18.D...
FRAN...

Atlan...
April ...

Atla...

INDE...
DEVE...
BILL...

Results 1-10 of 47

Contrasting search use cases

Search CM8, P8, CMOD

Search any ICA text search source

- Repository RDBMS and text search
  - Multiple searches active
  - Saved and shared searches
 - Search collection updated transactionally

- ICA text search with analytics
  - Dynamic searching
  - Facet drill down
  - Dynamic summary and highlighting
  - Result analytics
  - Search collection updated by crawling

IBM Content Navigator

CONFIGURING AND CUSTOMIZING

Content Navigator UI: Configuration

- Interface customization
  - Title, labels, icons, plugins
- Desktops
  - Customizable UI views/roles
  - Specify repositories, layout, menus, etc. per desktop
- Viewer mappings and menus
  - Custom viewers can be supported
  - Administrators can customize any menu and/or toolbar
- Plug-ins
  - Allows for new actions and services to be added to the UI
- Benefits
  - Many application use cases can be configured instantly through desktops
  - A single deployment of Navigator supports multiple desktops
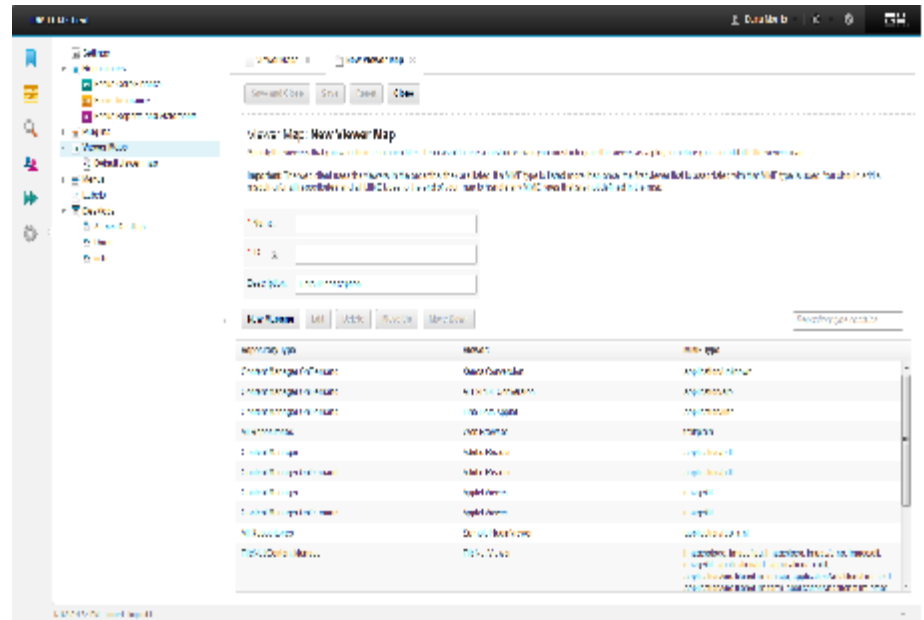
Navigator "Desktops" are applications
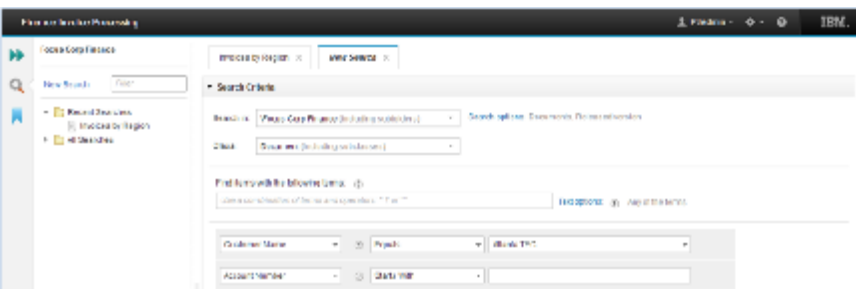
Invoice processing

Reports and Statements
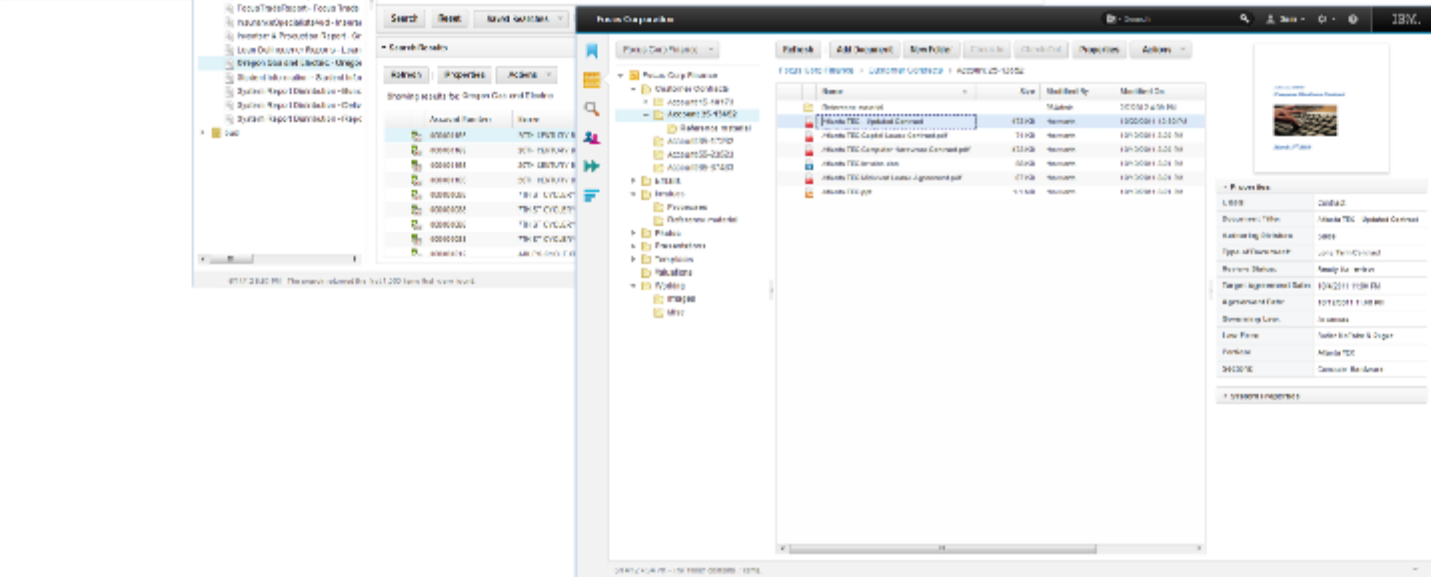
Collaborative Authoring

Navigator "Desktops" are applications

Navigator "Desktop" configuration

External data services

- ## OOTB UI functionality
  - Applies to add document, checkin, modify properties, search

- ## External choice lists

- ## Dependencies between properties

- ## Set default or dynamic values

- ## Property value and format validation

- ## Dynamic properties

- ## External services are provided with user id, current action, browser language
  - Enables context sensitive data

Add Document

The values that you enter for the document properties can be used to find the document later.

* Save in: Invoices

File name: EBO Invoice.docx

☑ Major version

▼ Properties

Class: Invoice

Document Title: EBO Invoice.docx
* Authoring Division: Sales
* Type of Document: Standard Invoice
* Review Status: Ready for review
* Account Number: 23-34837
* Customer Name: EBO Networks
* Region: Southwest
* Branch Office: Las Vegas
Total Cost:
Total Units:

**Database
CRM
ERP
Custom**

External data services benefits

- Why it useful
  - External reference data and rules can be used without changing the Navigator UI. A major enabler for using OOTB Navigator
  - Data interaction is live as the user types. This improves application data integrity

- Where does it apply
  - In the Navigator UI, applications using the toolkit and also the Mobile application

- Examples
  - Lookup the manager or the user in LDAP
  - Lookup an invoice in ERP
 - Lookup an customer in CRM
 - …

IBM Content Navigator

iPAD CLIENT

Architecture/Design: Mobile

- The Navigator mobile application is built for iPad running iOS5

- Mobile application is designed similarly to web browser design
  - It leverages the mid-tier services and provides a native Objective-C model API similar to the JavaScript model API used on the desktop web application

- First version will only support simple use cases:
  - Browse
    - Ability to navigate the folder structure in CM8 and P8.
  - Search
    - Ability to access stored searches in CM8 and P8 and OD folders.
  - Adding content via the camera and photo library in CM8 and P8.
    - EDS is supported, so the same choice lists visible in the desktop web application are available on the iPad.

Focus Corp Finance
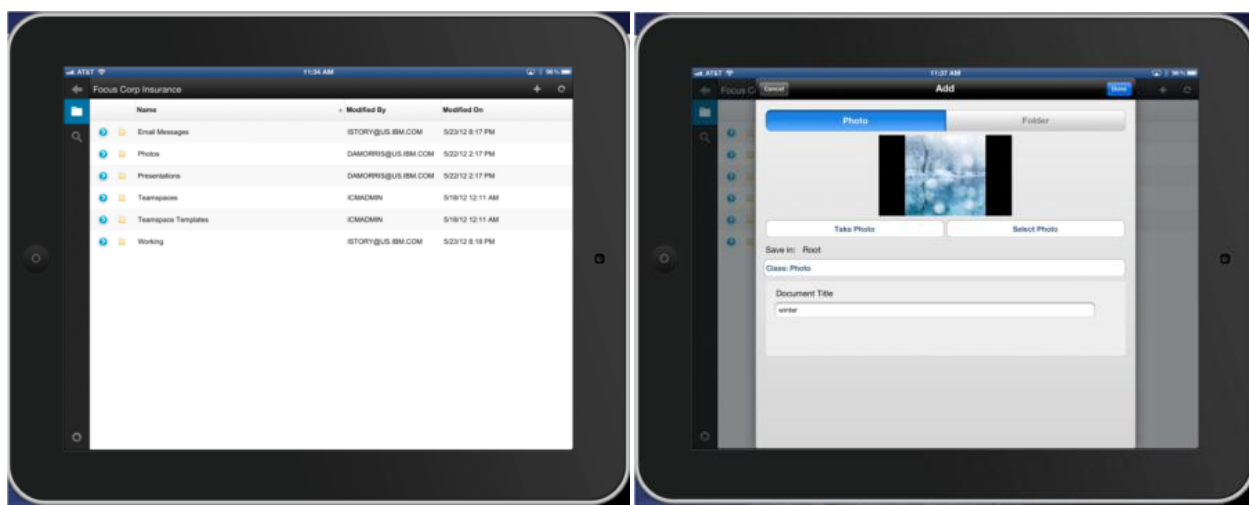
	Name ▲	Modified By	Modified On
📁	Customer Contracts	smills	2/17/12 12:59 PM
📁	Emails	P8Admin	4/13/12 7:18 AM
📁	Invoices	P8Admin	2/9/12 11:01 PM
📁	Photos	rhowarth	1/19/12 3:35 PM
📁	Presentations	P8Admin	10/26/11 10:56 AM
📁	Templates	P8Admin	10/20/11 6:27 AM
📁	Valuations	P8Admin	10/20/11 6:33 AM
📁	Working	P8Admin	2/9/12 10:53 PM

		Name ▲	Size	Modified By	Modified On	Major Version
❯	📄	A&T Piano.ppt	822 KB	rhowarth	10/19/11 3:38 PM	1
❯	📄	Amazing Cards.ppt	3 MB	rhowarth	10/19/11 3:47 PM	1
❯	📄	Atlanta TEC.ppt	1 MB	smills	5/29/12 2:12 PM	1
❯	📄	Better Investing.ppt	7 MB	rhowarth	10/19/11 3:38 PM	1
❯	📄	Better Investing.ppt	7 MB	smills	5/29/12 2:13 PM	1
❯	📄	Better Investing.ppt	7 MB	rhowarth	10/19/11 3:44 PM	1
❯	📄	Cycle World.ppt	3 MB	rhowarth	10/19/11 3:45 PM	1
❯	📄	Dispute Process.pptx	124 KB	shussey	5/7/12 2:42 PM	1
❯	📄	EBO Networks.ppt	509 KB	smills	5/29/12 2:13 PM	1
❯	📄	JK Enterprises.ppt	201 KB	rhowarth	10/19/11 3:45 PM	1
❯	📄	Slough Trading.ppt	2 MB	rhowarth	10/19/11 3:46 PM	1
❯	📄	Slough Trading.ppt	2 MB	rhowarth	10/19/11 3:46 PM	1
❯	📄	Smith Corporation.ppt	1 MB	smills	5/29/12 2:13 PM	1
❯	📄	Tech Masters.ppt	509 KB	smills	5/29/12 2:13 PM	1

Name ▲	Size	Modified By	Modified On	Major Version
📁 Reference material		P8Admin	2/7/12 4:09 PM	
📄 Atlanta TEC - Updated Contract	473 KB	rhowarth	10/20/11 12:50 PM	1
📄 Atlanta TEC Capital Lease Contract.pdf	71 KB	rhowarth	10/19/11 3:20 PM	1
📄 Atlanta TEC Computer Hardware Contract.pdf	473 KB	rhowarth	10/19/11 3:20 PM	1
📄 Atlanta TEC Invoice.doc	57 KB	rhowarth	10/19/11 3:21 PM	1
📄 Atlanta TEC Midwest Lease Agreement.pdf	67 KB	rhowarth	10/19/11 3:21 PM	1
📄 Atlanta TEC.ppt	1 MB	rhowarth	10/19/11 3:21 PM	1

Focus Corp Fi... ▸ Customer Co... ▸ Account 25-13652

Name	Size	Modified By	Modified On	Major Version

⊙ 📁 Reference mat...

⊙ 📄 Atlanta TEC - U...

Properties   Done

▾ **Properties**

Document Title
Atlanta TEC - Updated Contract

Authoring Division
Sales

Type of Document
Long Term Contract

Review Status
Ready for review

Target Agreement Date
2011-10-05T06:00:00Z

Agreement Date
2011-10-19T06:00:00Z

Governing Law
Arkansas

Law Firm
Butler McCabe & Ruger

Parties
Atlanta TEC

ATLANTA TEC NON-BINDING FRANCHISE AGREEMENT

Dated: _____

Location:

_____

Franchisee:

Effective March 2, 2008

ATLANTA TEC NON-BINDING FRANCHISE AGREEMENT

INDEX

Cancel   **Add**   **Done**

Photo	Folder

Take Photo	Select Photo

Save in: Account 25-13652

Class: Invoice

Document Title

Text string

* Authoring Division

Sales ▾

* Type of Document

Standard Invoice ▾

* Review Status

Approved ▾

* Account Number

12-12345

* Customer Name

JK Enterprises ▾

* Region

Northeast ▾

* Branch Office

Williamsburg ▾
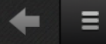
Contracts by Governing Law   Search

Class	Contract
Repository	Focus Corp Finance
Property options	Match all ➜
Title	Detail

Document Title   Like ➜

contract

Governing Law   Include All ➜

California ▼

Sectors   Equals ➜

Telecommunications ▼

	Name ▲	Modified By	Modified On
➤ 📊	Amazing Cards Valuation Model.xls	rhowarth	10/19/11 3:49 PM
➤ 📄	Amazing Cards.ppt	rhowarth	10/19/11 3:47 PM
➤ 📄	Atlanta TEC - Updated Contract	rhowarth	10/20/11 12:50 PM
➤ 📄	Atlanta TEC Capital Lease Contract.pdf	rhowarth	10/19/11 3:20 PM
➤ 📄	Atlanta TEC Computer Hardware Contract.pdf	rhowarth	10/19/11 3:20 PM
➤ 🖼	Atlanta TEC Invoice Processing Workflow.tif	P8Admin	10/9/11 8:35 PM
➤ 📄	Atlanta TEC Invoice.doc	rhowarth	10/19/11 3:21 PM
➤ 📄	Atlanta TEC Midwest Lease Agreement.pdf	smills	5/29/12 2:14 PM
➤ 📄	Atlanta TEC Midwest Lease Agreement.pdf	rhowarth	10/19/11 3:21 PM
➤ 📊	Atlanta TEC Valuation Model.xls	smills	5/29/12 2:14 PM
➤ 📄	Atlanta TEC.ppt	smills	5/29/12 2:12 PM
➤ 📄	Atlanta TEC.ppt	rhowarth	10/19/11 3:21 PM
➤ 🖼	Beijing	smills	5/29/12 2:11 PM
➤ 📄	Better Investing.ppt	rhowarth	10/19/11 3:38 PM
➤ 📄	Better Investing.ppt	smills	5/29/12 2:13 PM

ARCHITECTURE AND REQUIREMENTS

Architecture/Design: Architecture Diagram
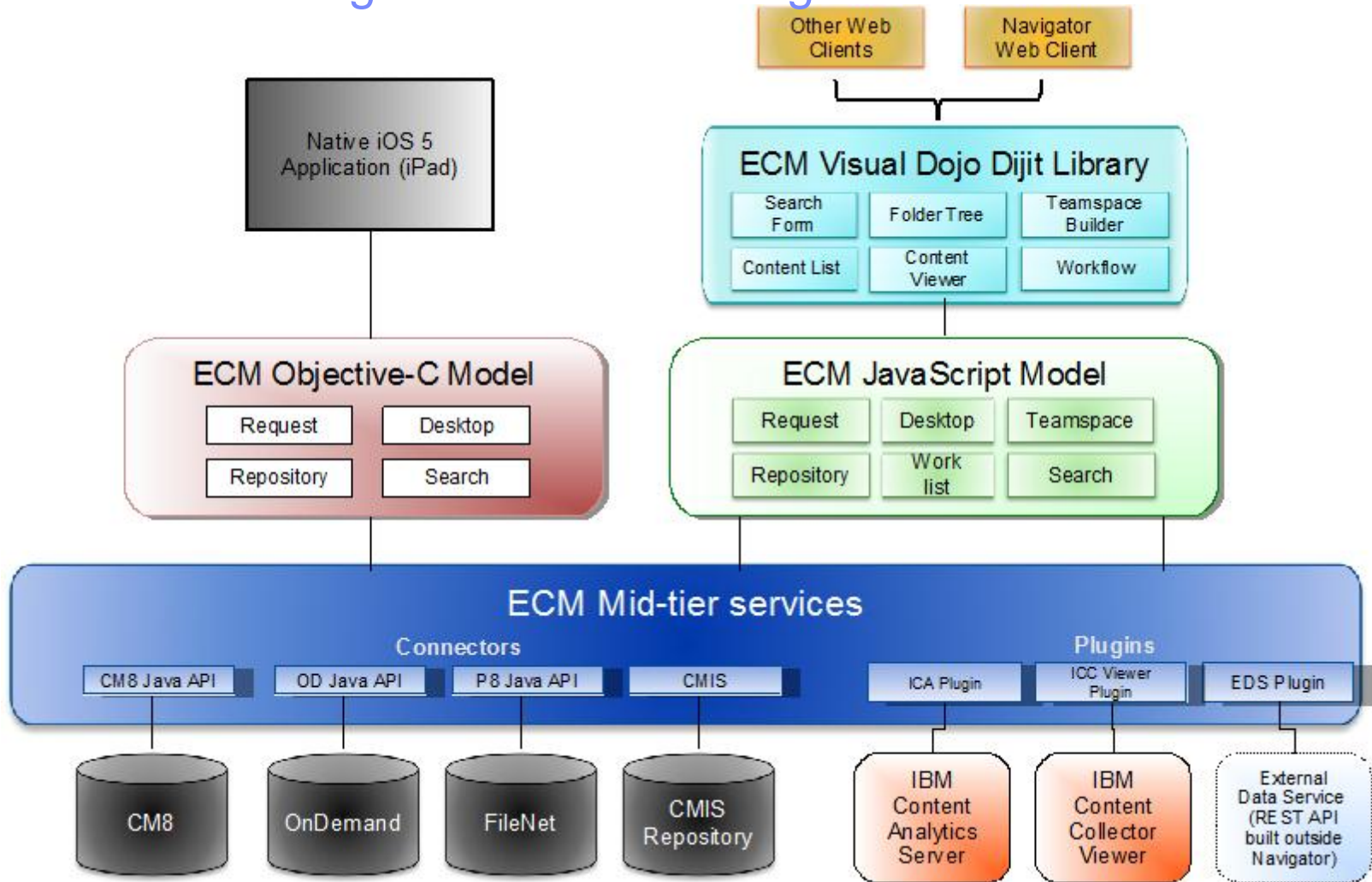
IBM Content Navigator

INFORMATION RESOURCES

IBM Content Navigator
External information resources

- **Information centers:**
  - IBM Content Manager with IBM Content Navigator:
  - http://publib.boulder.ibm.com/infocenter/cmgmt/v8r4m0/index.jsp
  - IBM Content Manager OnDemand with IBM Content Navigator:
  - http://publib.boulder.ibm.com/infocenter/cmod/v8r5m0/index.jsp
  - IBM FileNet Content Manager with IBM Content Navigator:
  - http://publib.boulder.ibm.com/infocenter/p8docs/v5r1m0/index.jsp

- **System requirements:**
  - http://www.ibm.com/support/docview.wss?uid=swg27024958

- **Publication library:**
  - http://www.ibm.com/support/docview.wss?uid=swg27025015

- **Navigator public forum**
  - http://www.ibm.com/developerworks/forums/forum.jspa?forumID=2869&cat=19

- **Navigator mobile public forum**
  - http://www.ibm.com/developerworks/forums/forum.jspa?forumID=2868&cat=19

- Customers and partners will download Navigator as a component of the latest repository server release (P8 5.1, CM8.4.3, CMOD 8.5)

IBM Content Navigator
Internal resources

- Demonstration environments
  - FileNet and CM/CMOD virtual machines are under development by Jeff Peterman

- IBM Content Navigator **<u>internal</u>** IBM Community
  - https://w3-connections.ibm.com/communities/service/html/communityview?communityUuid=0b13e9aa-6867-4634-b6fd-2c37ae6e7e1a

- Where do I download the install package for internal IBM use?
  - Search for "**IBM Content Navigator V2.0.0 Multiplatform Multilingual eAssembly**"
  - https://w3-103.ibm.com/software/xl/download/ticket.do

- Where do I download the iPad application?
  - The application will be posted in the Apple appstore when certification is complete. It will be a no cost download. The search term will be "IBM Content Navigator"