

Course Guide

IBM FileNet Content Manager

5.2.1: Introduction

Course code F280 ERC 1.0



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Course description

IBM FileNet Content Manager 5.2.1: Introduction

Duration: 1/2 day

Purpose

Learn about IBM FileNet Content Manager. You learn the basic architecture and how IBM FileNet Content Manager can be used to solve real-world business challenges. You learn about the Administration Console for Content Platform Engine and how to navigate the FileNet P8 domain structures.

Audience

This course is intended for system administrators and solution builders.

Prerequisites

- F270 – IBM Content Navigator 2.0.3.6: Introduction or equivalent knowledge
- P8 terminology, including: Content Platform Engine, IBM Content Navigator, object stores, objects, Content Services, Process Services.
- Using IBM Content Navigator to work with content.
- Configuring desktops in IBM Content Navigator.

Objectives

- Identify components, features, and common use cases for IBM FileNet Component Manager.
- Find the core web applications that make up IBM FileNet Content Manager.
- Use Administration Console for Content Platform Engine (ACCE) to find properties within the Global Configuration database.
- Use ACCE to find folders, classes, and property templates in an object store.

Contents

- Introduction to IBM FileNet Content Manager
- IBM FileNet Content Manager architecture
- Administration Console for Content Platform Engine

Curriculum relationship

To learn about related courses, visit the IBM authorized training website:

<http://www-304.ibm.com/jct03001c/services/learning/ites.wss/us/en?pageType=page&c=Y678448H04759K32>

Agenda

**Note**

The following unit and exercise durations are estimates, and might not reflect every class experience.

Day 1

- (00:15) Course introduction
- (00:30) Unit 1. Introduction to IBM FileNet Content Manager
- (00:00) Exercise 1. Place holder
- (00:20) Unit 2. IBM FileNet Content Manager architecture
- (00:20) Exercise 2. Explore the IBM FileNet Content Manager applications
- (00:20) Unit 3. Administration Console for Content Platform Engine
- (00:30) Exercise 3. Explore Administration Console for Content Platform Engine

Unit 1. Introduction to IBM FileNet Content Manager

Estimated time

00:30

Overview

In this unit, you are introduced to IBM FileNet Content Manager. The basic architecture and common use cases. You identify components and find the web applications for a basic IBM FileNet Content Manager system.

How you will check your progress

Successfully complete the review questions

References

Knowledge Center

<http://www.ibm.com/support/knowledgecenter/SSNW2F/welcome>

<http://www.ibm.com/support/knowledgecenter/SSEUEX/welcome>

Why is this lesson important to you?

- You are new to IBM FileNet Content Manager. You need to know what IBM FileNet Content Manager is and how it is used.

Introduction to IBM FileNet Content Manager

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Figure 1-1. Why is this lesson important to you?

Unit objectives

- Identify core components of IBM FileNet Content Manager.
- Identify content management capabilities.
- Describe how IBM FileNet Content Manager can be used to address business needs in different industries.

What is Enterprise Content Management?

- Enterprise Content Management (ECM) is more than storing and managing documents.
- ECM is about:
 - Supporting business applications
 - Providing users with access to the right information in the context of their application.
 - Governing information and ensuring you meet business or industry regulations.
- ECM solutions enable businesses to support a wide-range of document-centric use cases.

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Figure 1-3. What is Enterprise Content Management?

Enterprise Content Management is more than just storing and managing documents. ECM is about supporting business applications and providing users with access to the right information within their application. It is governing that information to ensure that you meet the regulations required by your business or industry.

ECM solutions enable businesses to support a wide-range of document-centric use cases.

ECM Core Capabilities

User Interface	Records Management
Metadata Management	Logging/Reporting
Security	Event Management
API & Programming Model	Viewing & Publishing
Workflow	Document Transformation
Capture	Administration

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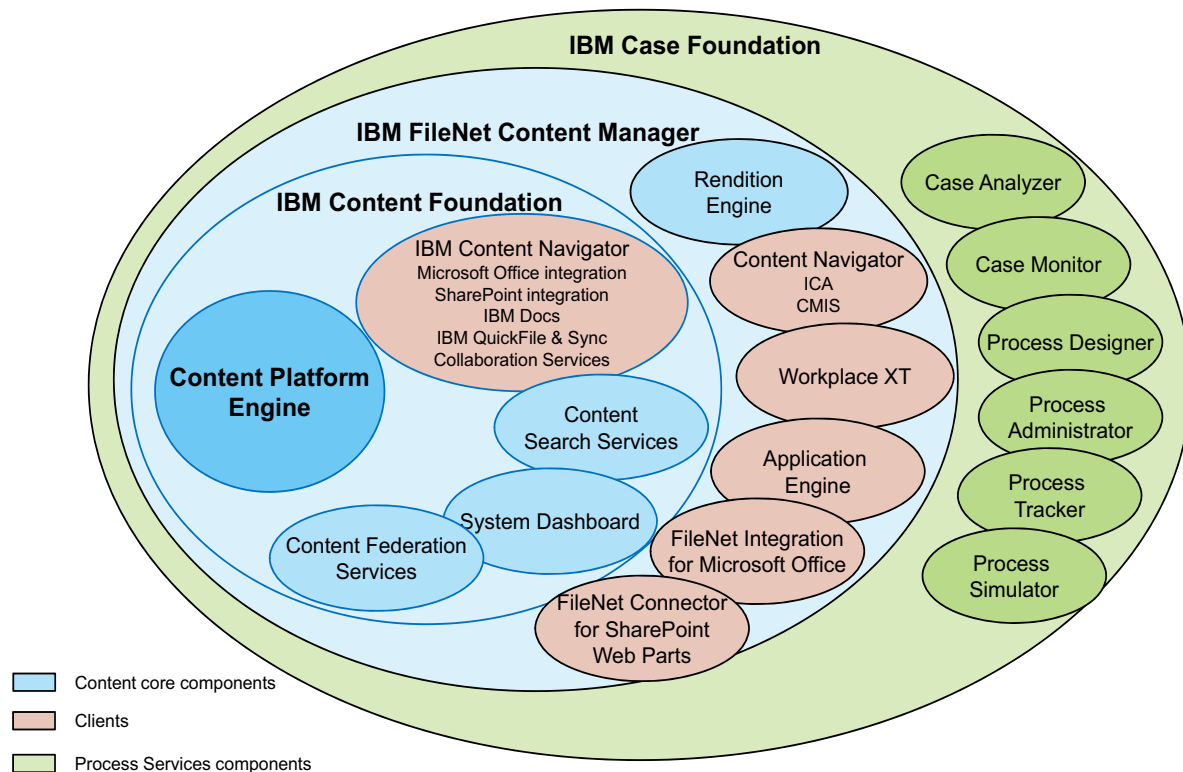
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Figure 1-4. ECM Core Capabilities

Enterprise Content Management software should provide a set of core capabilities.

- User interface to access the content.
- Metadata management to enable searching and categorizing.
- Security to ensure that only people with the correct access can view, edit, or delete a document.
- API & programming model to the development of custom solutions.
- Workflow to automate business processes.
- Records Management to govern information and ensure that you meet business and industry regulations.
- Logging/Reporting to provide required audit trails.
- Event Management to automate actions based on events, such as document or metadata creation or updates.
- Viewing & Publishing
- Document transformation to transform documents into different formats, such as pdf.
- Administration – a tool to allow administration of the ECM environment.

FileNet P8 Platform product bundles



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Figure 1-5. FileNet P8 Platform product bundles

The diagram shows FileNet P8 Platform product bundles and the products included in each.

IBM Content Foundation

IBM Content Foundation is the smallest of the bundles. It provides the basic products needed to the essential features of an enterprise content management system. IBM Content Foundation also includes, integration with collaboration services to provide social features.

- **Content Platform Engine:** The core engine of the FileNet P8 Platform that provides both content and process services.
- **IBM Content Navigator:** The primary web interface for business users to work with content and workflow tasks. Users can browse or search for content in the repositories, access their work items, and set up special team rooms to coordinate and collaborate on content-related activities. IBM Content Navigator is highly customizable. IBM Content Navigator provides more integration features:
 - **Microsoft office integration:**
 - **SharePoint integration:**
 - **IBM Docs:**
 - **IBM QuickFile:**

- **Sync:**
- **Content Search Services:** Component that provides full content indexing and search capability.
- **System Dashboard:**
- **Content Federation Services:** Content can exist in many systems. With Content Federation, it is possible to manage that content from a single location, even while the content itself exists in disparate repositories.

IBM FileNet Content Manager: The IBM FileNet Content Manager bundle includes all the components that IBM Content Foundation includes plus:

- **Rendition Engine:** Creates PDF or HTML versions of content upon demand.
- More IBM Content Navigator Add-ons:
 - IBM Content Analytics with Enterprise Search
 - CMIS
- **Workplace XT:** Legacy web interface for business users to work with content and workflow tasks. IBM Content Navigator is replacing Workplace XT.
- **Application Engine:** Legacy web interface for business users to work with content and workflow tasks. IBM Content Navigator is replacing Workplace XT.
- **FileNet Integration for Microsoft Office (FIMO):** Provides direct integration with Microsoft office from IBM FileNet Content Manager. You can create documents, spreadsheets, and so on, in Microsoft Office tools and add them to a FileNet Content Manager repository.
- **FileNet Connector for SharePoint Web Parts:** Install custom web parts into your SharePoint library.

IBM Case Foundation

IBM FileNet Business Process Manager was renamed IBM Case Foundation to reflect IBM's commitment to providing the foundation for delivering case-style applications. IBM Case Foundation provides workflow tools to design, monitor, track, and administer workflow applications. IBM Case Foundation is core backend component of IBM Case Manager. IBM Case Foundation bundle includes all the components that IBM Content Foundation and IBM FileNet Content Manager include, plus:

- **Case Analyzer:** You use Case Analyzer to analyze case, task, and workflow activity. You can determine cycle times for business processes and find bottlenecks that affect production and service levels. You can review collected data to isolate problems and take control of the data elements reviewed. You can generate chart-based reports on information gathered from the Content Platform Engine event and audit logs.
- **Case Monitor:** IBM FileNet Case Monitor provides a set of projects and objects that you can use in IBM Cognos Real-time Monitoring to monitor the current state of your active cases or running workflows.
- **Process Designer:** A graphical design tool to define complex business processes into workflows. Workflows can be automated to launch when a document is added or changed.

- **Process Administrator:** A tool used to find workflows, work items, and event in a running workflow. Useful for troubleshooting a workflow with an issue or reassign work.
- **Process Tracker:** A graphical tool used to track status of running workflows. You can see which steps are completed, when they completed, and which steps are currently active.

Features

- Content management
- Integration with external repositories
- Workflow management
- Application environment
- Application integration
 - Microsoft Office
 - SAP
 - FileNet Collaboration Services
 - SharePoint
- Records management
- System management

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Figure 1-6. Features

Help path

FileNet P8 Platform 5.2.1>System overview>Features

http://www.ibm.com/support/knowledgecenter/SSNW2F_5.2.1/com.ibm.p8.sysoverview.doc/p8sov001.htm

IBM FileNet Content Manager features provide the enterprise-level capabilities that are required for solving critical business requirements.

Content Management

At the core of the platform are repository services for capturing, managing, and storing your business-related digital assets. Multiple repositories, called object stores, can be created and managed within a single system to serve your business requirements.

Integration with external repositories

With IBM FileNet Content Federation Services you can integrate data in an external repository with IBM FileNet Content Manager and access the documents as though they are stored in an object store. An external repository acts like a virtual storage area for the Content Platform Engine system.

Workflow management

With IBM FileNet Content Manager you can create, modify, manage, analyze, and simulate business processes, or workflows, run by applications, enterprise users, and external users such as partners and customers.

Application environment

IBM FileNet Content Manager includes an application environment to provide users with enterprise content management (ECM) functionality. IBM Content Navigator is a web client that provides users with a console for working with content from multiple content servers, including content that is stored on Content Platform Engine object stores

Application integration

FileNet P8 tools help you integrate with various vendor applications. Such as Microsoft Office, SAP, FileNet Collaboration Services, and SharePoint.

Records management

IBM Enterprise Records is a records management solution that can help companies manage risk through effective, enforceable records management policy, for achievable and cost-effective compliance. IBM Enterprise Records is fully integrated with IBM FileNet Content Manager.

System management

IBM FileNet Content Manager provides a complete set of system administration tools that allow for monitoring, validation, and configuration changes from a central location with a dispersed deployment.

FileNet P8 Platform integration options

- IBM Datacap
- IBM Enterprise Records
- IBM Case Manager
- IBM Content Collector
- IBM Content Collector for SAP
- IBM Content Federation Services
 - For Content Manager OnDemand
 - For Image Services
 - For Content Integrator
- Integration options available through IBM Content Navigator
 - IBM FileNet Collaboration Services
 - IBM Connections
 - IBM CMIS for Enterprise Content Management
 - Microsoft Office integration
 - SharePoint integration
 - IBM Docs
 - IBM QuickFile
 - Sync services

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Figure 1-7. FileNet P8 Platform integration options

Help path

FileNet P8 Platform 5.2.1>System overview>FileNet P8 architecture>FileNet P8 integration options

http://www.ibm.com/support/knowledgecenter/SSNW2F_5.2.1/com.ibm.p8.sysoverview.doc/p8sov138.htm

Content Navigator 2.0.3>Planning, installing, and configuring IBM Content Navigator>IBM Content Navigator overview

https://www.ibm.com/support/knowledgecenter/SSEUEX_2.0.3/com.ibm.installingeuc.doc/eucao008.htm

Datacap

A data capture product that scans, classifies, recognizes, validates, verifies, and exports data and document images quickly, accurately and cost effectively. Datacap can be used to automate the capture of data into the FileNet Content Manager object stores.

IBM Enterprise Records

IBM Enterprise Records is a records management solution that provides content, process, federation, and connectivity to automate and simplify all records-based activities by supporting records in both electronic and physical form from their creation to their disposition.

IBM Case Manager

IBM Case Manager simplifies the job of designing and building a case management system and provides a graphical user interface for caseworker to easily manage cases.

IBM Content Collector

IBM Content Collector archives email and other digital content in a central repository.

IBM Content Collector for SAP

IBM Content Collector for SAP provides advanced archiving capabilities that help SAP users run their businesses more efficiently. It provides access to business information of all types, supports the transfer of older information to lower-cost disks and tapes, and improves system performance.

IBM Content Federation Services (CFS)

With IBM FileNet Content Federation Services you can integrate data in an external repository with the Content Platform Engine and access the documents as though they are stored in an object store.

CFS for Image Services

IBM FileNet Content Federation Services for Image Services integrates and federates content from IBM FileNet Image Services repositories and enables Content Platform Engine to use the repository as another content storage device. Users of FileNet P8 applications have full access to content that is stored in existing repositories.

CFS for Content Manager OnDemand

Content Federation Services for Content Manager OnDemand federates content from IBM Content Manager OnDemand. Content Federation Services for Content Manager OnDemand exposes content that is stored in a Content Manager OnDemand repository to a broad range of FileNet® P8 applications, including enterprise records management and workflow systems.

CFS for Content Integrator

IBM FileNet CFS for Content Integrator federates documents from multiple types of repositories, including IBM Content Manager, IBM FileNet Content Services, Documentum Content Server, and Open Text Livelink Enterprise Server.

Integration options available through IBM Content Navigator**FileNet Collaboration Services**

IBM FileNet Collaboration Services connects a content repository to IBM Connections and enhances capabilities for collaboration and document management throughout an organization or among teams.

IBM CMIS for Enterprise Content Management

IBM Content Management Interoperability Services (CMIS) for Enterprise Content Management allows IBM FileNet Content Manager to integrate with repositories that conform to the OASIS Content Management Interoperability Services specification standard.

Microsoft Office integration

FileNet P8 integrates with Microsoft Office applications so that users can manage documents, email, and attachments that are within a FileNet P8 object store directly from the associated office application.

SharePoint integration

FileNet P8 and SharePoint technologies are complimentary solutions that, when used together, provide an environment where business users can easily collaborate on work-in-process documents and tasks, yet comply with content and compliance initiatives across the enterprise. SharePoint users can continue to use the SharePoint easy-to-use and familiar interfaces while IBM FileNet Content Manager provides a robust content, process, and compliance infrastructure that is transparent to users. With this approach, business users can use SharePoint Services sites and SharePoint Portal for most daily content, process, and compliance activities without having to learn new applications or perform additional content or compliance management tasks.

IBM Docs

The IBM Docs integration enables users to open documents that are stored in a FileNet Content Manager repository in IBM Docs for collaborative editing.

IBM QuickFile

IBM QuickFile provides business users with a security-rich, highly reliable way to exchange files inside and outside their organizations.

Sync services

Sync services provide an efficient way for users to work with files, avoiding the need to check out, check in, and download items that they work with regularly.

Social capabilities

- IBM Content Navigator > IBM FileNet Collaboration Services.
- Connects a content repository to IBM Connections
 - Social collaboration
 - User comments on managed objects
 - Social tagging of managed objects
 - Tracking document downloads
 - Document recommendations
 - Document thumbnails
 - Document recovery bin
 - Searching
 - Document management capabilities for IBM Connections communities

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Figure 1-8. Social capabilities

Help path

Content Navigator 2.0.3>Planning, installing, and configuring IBM Content Navigator>IBM Content Navigator overview>IBM Collaboration Services overview>Features of IBM FileNet Collaboration Services

http://www.ibm.com/support/knowledgecenter/SSEUEX_2.0.3/com.ibm.installingeuc.doc/eucao027.htm

IBM FileNet Collaboration Services is integrated with IBM Content Navigator. It enables social collaboration, searching, and document management capabilities for IBM Connections communities who share information on a FileNet Content Manager repository.

IBM FileNet Collaboration Services connects a content repository to IBM Connections and enhances capabilities for collaboration and document management throughout an organization or among teams.

Enterprises integrate IBM Connections and IBM FileNet Collaboration Services to deploy a social content management solution, most commonly on an intranet. With IBM Connections communities, users can organize and customize libraries and documents on an enterprise-scale content repository with minimal support from information technology (IT) employees.

IBM FileNet Content Manager solutions/applications

- What is an IBM FileNet Content Manager solution?
 - A solution that addresses a business need.
 - Involves managing content, processes, and applications.
 - Improves efficiency and compliance.
- IBM FileNet Content Manager provides the tools to build an Enterprise Content Management solution.
 - Metadata: Classes, properties
 - Content storage
 - Efficient searches
 - Security
 - User interface options
 - Automation
 - Integration

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Figure 1-9. IBM FileNet Content Manager solutions/applications

IBM FileNet Content Manager provides tools for building a solution or application that addresses a business need or challenge. Each solution is unique to the business that creates it. An organization is often faced with business challenges that might be addressed or improved by developing an automated process to handle it. The business analyst and solution builder must analyze the business needs and then develop the IBM FileNet Content Manager solution to meet those needs.

Usually, a solution includes the following elements that must be carefully considered and planned before you build the solution:

- **Metadata:** Metadata is information about objects, whether they are documents or other kinds of business objects. Metadata defines the classes and properties of the data in your system that you need in order for users to find the data.
- **Content storage:** where is the content stored?
- **Searches:** Searches can have a considerable effect on system performance. When designing a solution, a solution builder needs to predict the kinds of searches that are going to be used and create searches to efficiently use the system resources.
- **Security:** Who is going to have access to the content and processes?
- **User interface options:** How do you want users to access content? How can you make the interface easy for them to use?

- **Automation:** What parts of the business process can be automated with lifecycle actions, events, and workflows?
- **Integration:** Will users access the objects with IBM Content Navigator, or are they going to use other clients, such as IBM Connections, Lotus Quickr? Does the content exist in another repository that users need to access?

Examples of business needs addressed with IBM FileNet Content Manager

Banking



Universities



Government agencies



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Figure 1-10. Examples of business needs addressed with IBM FileNet Content Manager

The next slides cover actual real-world use cases, for IBM FileNet Content Manager, in three different industries:

- Banking
- Universities
- Government Agencies

You see the business need, the solution that addressed the business need, and the benefits realized by the solution.

Bank: Business need

- The Asset and Wealth Management division of a bank:
 - Over 150 content repositories and related systems across the globe
 - Each repository has its own taxonomy
 - Over 15 technologies used
 - Costs a substantial amount to operate annually
- The Sales and Marketing teams struggle to:
 - Find the correct version of a document.
 - Multiple versions are filed in multiple locations.
 - Prove which version of a document is provided to a client.
 - Prove that proper compliance was approved, relevant, or suitable.

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Figure 1-11. Bank: Business need

The Asset and Wealth Management division of the bank is responsible for the creation, marketing, and selling of relevant products and solutions to clients (both individual and institutional). In a regulated industry, it is important for the bank to demonstrate that the products and solutions are appropriate for the clients and that the collateral provided to clients is suitable, relevant, and accurate.

The bank has over 150 content repositories and related systems that are implemented locally across the globe. Each repository has a different taxonomy, uses more than 15 different technologies, and costs the bank a substantial amount of money to operate on an annual basis.

The Sales and Marketing teams struggle to find the correct version of a document, multiple versions are filed in multiple locations. It is not always possible to prove which version of a document is provided to a client, or whether it is properly compliance approved, relevant, and suitable.

Solution

- Deploy IBM FileNet Content Manager to provide:
 - Scalable, secure, auditable repository
 - Used to upload compliance approved documentation
- Document upload performed by authorized users through IBM Content Navigator that uses:
 - External Data Services to dynamically create lists to choose from to populate document properties.
 - The lists are created from an external database, populated with accurate data.
 - Creates a common taxonomy
- Sales and Marketing use an IBM Content Navigator iPad app to search the repository for documentation.
- IBM Content Collector is used to integrate with an existing bank repository.
 - When a document is published in the existing repository, that document is ingested into the FileNet Content Manager repository.
 - Providing a gradual migration of the existing repository to the new centralized repository.

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Figure 1-12. Solution

The solution was to deploy IBM FileNet Content Manager to provide a scalable, secure, auditable, repository that might be used to upload compliance approved documentation. Authorized users upload the documents with the IBM Content Navigator application, which makes extensive use of the Extended External Data Services (EEDS). EEDS is used to present a list of product names from which the users can choose. When a product name is selected, EEDS connects to an Oracle database to retrieve a set of product-related data to automatically populate the document properties. The Sales and Marketing teams use the Content Navigator web client and a custom developer iPad application to search the repository for documentation that can be shared with prospective clients.

IBM Content Collector (ICC) is used to provide integration with one of the major existing repositories in the bank. Every time a document is published in the third-party repository, the document is pushed across to ICC and ingested into the FileNet repository. The solution provides a gradual migration path from the third-party system over a time.

Benefits

- One place to look for product and solutions documentation.
- Guarantee that the content is compliance approved before making it available to users.
- Traceability of the use of the content.
- Reduced operational costs through consolidation of platforms.
- Automated management of the expiry of documents and reminders to upload new versions.
- Configurable security to prevent access when products are withdrawn.

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Figure 1-13. Benefits

The solution provides the following benefits to the client:

- One place to look for product and solutions documentation
- Guarantee that the content is compliance approved before it is available to the users
- Traceability of the use of content through audit event recording
- Reduced operational costs through consolidation of many platforms
- Platform to enable other transformational activities based on globally accessible digital content
- Automated management of the expiry of documentation and reminders to upload new versions of documents
- Users are able to access documentation while on the move through the mobile application that runs on iPads
- Security that can be configured to prevent access to some documents should there be a need to withdraw products/solutions.

University: Business need

- An accurate and efficient method to ingest various documents types from multiple departments into a centralized location.
- During ingestion, documents need to be indexed with appropriate metadata and stored with appropriate content.
- Security must be automatically assigned based on the document type.
- After ingestion, the documents need to be accessible and searchable by multiple departments.

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Figure 1-14. University: Business need

A university needs an accurate and efficient method to ingest various document types from multiple departments, into a centralized location.

The documents need to be indexed with appropriate metadata during ingestion and stored with appropriate content.

Security should be assigned based on the document type. After ingestion, the documents need to be accessible and searchable by multiple departments.

Solution

- Use IBM Datacap to ingest the documents into an IBM FileNet Content Manager repository.
 - Datacap:
 - Automatically captures the metadata from the documents and stores it into the repository with the document's content.
 - A custom workflow does a periodic check for documents that require indexing.
 - Verifies that the metadata is present and valid.
 - Indexes the documents and assigns them to document classes, based on predefined business rules.
 - Moves the documents to a queue for user input.
 - If any metadata is missing or invalid, the work items are routed for manual user indexing.
 - Search templates created to facilitate searching/retrieval of documents.

The solution was to use IBM Datacap to ingest the documents into an IBM FileNet Content Manager repository.

IBM Datacap automatically captures the metadata from the documents, following rules defined. The documents and their content are saved into the repository.

A custom workflow was built to periodically check for documents that need indexing. The workflow verifies that metadata is present and valid. It then indexes the documents and assigns them to appropriate document classes, based on predefined business rules. If any metadata is missing or invalid, the documents are routed to a queue for manual user indexing.

Search templates were created to facilitate searching and retrieving the documents by the different departments.

Benefits

- Provides a consistent method to ingest and index documents to a centralized document management system.
- Improves accuracy and efficiency of the ingesting process.
- Supports moving away from paper filing practices.
- Ensures ability to locate and retrieve documents.
- Provides document retention mechanism.

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Figure 1-16. Benefits

As a result of the solution, the university:

- Has a consistent method of ingesting and indexing documents and storing them in a centralized document management system.
- Improved the efficiency and accuracy of the ingesting process.
- Is moving away from paper filing practices.
- Can locate and retrieve the documents they need.

An added benefit was the addition of a document retention mechanism.

Government agency: Business need

- Replace existing outdated solution with new solution that provides:
 - Centralized architecture capable of supporting all supporting government agencies, managed by a single service center.
 - The functional needs of:
 - Accounts Payable
 - Credit Card Services
 - Purchasing change requests
 - Scalable Document capture solution that supports OCR.
 - Efficient Document capture
 - Support multiple input sources:
 - Paper scanning
 - Email
 - Folders/network file shares
 - Meet government agency standards in the client application.

Solution:

- Government agency implemented a custom solution built on IBM FileNet Content Manager.

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Figure 1-17. Government agency: Business need

A government agency needs to replace their existing outdated solution with a new solution that provides:

- Centralized architecture that can support all supporting government agencies that can be managed from a single service center.
- The solution needs to address the functional needs of:
 - Accounts Payable
 - Credit Card Services
 - Purchasing change requests.
- The solution needs to be a scalable Document capture solution that supports OCR and supports multiple input sources, such as, email, paper scanning, and folders and network file shares.
- The client application needs to meet government agency standards.

A custom solution was implemented on IBM FileNet Content Manager.

Benefits

- Automated Credit Card requests for new card holders, changes, and renewals.
- Automation of requests for Purchase Order change notices.
- Adds interface between Accounts Payable and Purchase Orders.
- Increases capacity and throughput to support all agencies.
- Visibility to monitor the status of transactions.
- Provides platform for a record retention repository.
- Increases Accounts Payable scanning and indexing capacity by 100%.
- Consolidates all documents into one place for increased efficiency.

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Figure 1-18. Benefits

The solution enabled the government agency to:

- Automate Credit Card request for new card holders.
- Support changes and renewals for Credit Card requests.
- Automate requests for Purchase Order change notices.
- Add an interface between Accounts Payable and Purchase Orders.
- Increase the capacity and throughput to support all the government agencies.
- Monitor the status of transactions.
- Increase Accounts Payable scanning and indexing capacity by 100%.
- Consolidate all their documents into one centralized location, providing increased efficiency.

Unit summary

- Identify core components of IBM FileNet Content Manager.
- Identify content management capabilities.
- Describe how IBM FileNet Content Manager can be used to address business needs in different industries.

Review questions



1. True or False: Enterprise Content Management is storing and managing documents.
2. Which of the following features is not an IBM FileNet Content Management feature?
 - A. Records management
 - B. Application integration
 - C. Workflow management
 - D. Sync and Share
3. Which of the following integration options is provided by IBM Content Navigator?
 - A. IBM Connections
 - B. IBM Content Collector
 - C. IBM Enterprise Records
 - D. IBM Case Manager

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Figure 1-20. Review questions

Write your answers here:

- 1.
- 2.
- 3.

Review questions



4. IBM FileNet Content Manager is commonly used by which industry?
 - A. Banking
 - B. Academia
 - C. Government agencies
 - D. All of the above

5. How would you define an IBM FileNet Content Manager solution?
 - A. An object store that contains folders and files.
 - B. A set of workflows.
 - C. A solution that addresses a business need.
 - D. A set of stored searches.

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Figure 1-21. Review questions

Write your answers here:

- 4.
- 5.

Review answers



1. True or False: Enterprise Content Management is storing and managing documents.
The answer is False.

2. Which of the following features is not an IBM FileNet Content Management feature?
 - A. Records management
 - B. Application integration
 - C. Workflow management
 - D. Sync and ShareThe answer is D.

Review answers



3. Which of the following integration options is provided by IBM Content Navigator?

- A. [IBM Connections](#)
- B. IBM Content Collector
- C. IBM Enterprise Records
- D. IBM Case Manager

The answer is: [A.](#)

4. IBM FileNet Content Manager is commonly used by which industry?

- A. Banking
- B. Academia
- C. Government agencies
- D. [All of the above](#)

The answer is: [D.](#)

Review answers



5. How would you define an IBM FileNet Content Manager solution?
- A. An object store that contains folders and files.
 - B. A set of workflows.
 - C. A solution that addresses a business need.
 - D. A set of stored searches.

The answer is: C.

Unit 2. IBM FileNet Content Manager architecture

Estimated time

00:20

Overview

In this unit, you learn about the baseline architecture for a FileNet P8 Platform and the Content Platform Engine.

How you will check your progress

Successfully complete the review questions and lesson exercises.

References

Knowledge Center

<http://www.ibm.com/support/knowledgecenter/SSNW2F/welcome>

Unit objectives

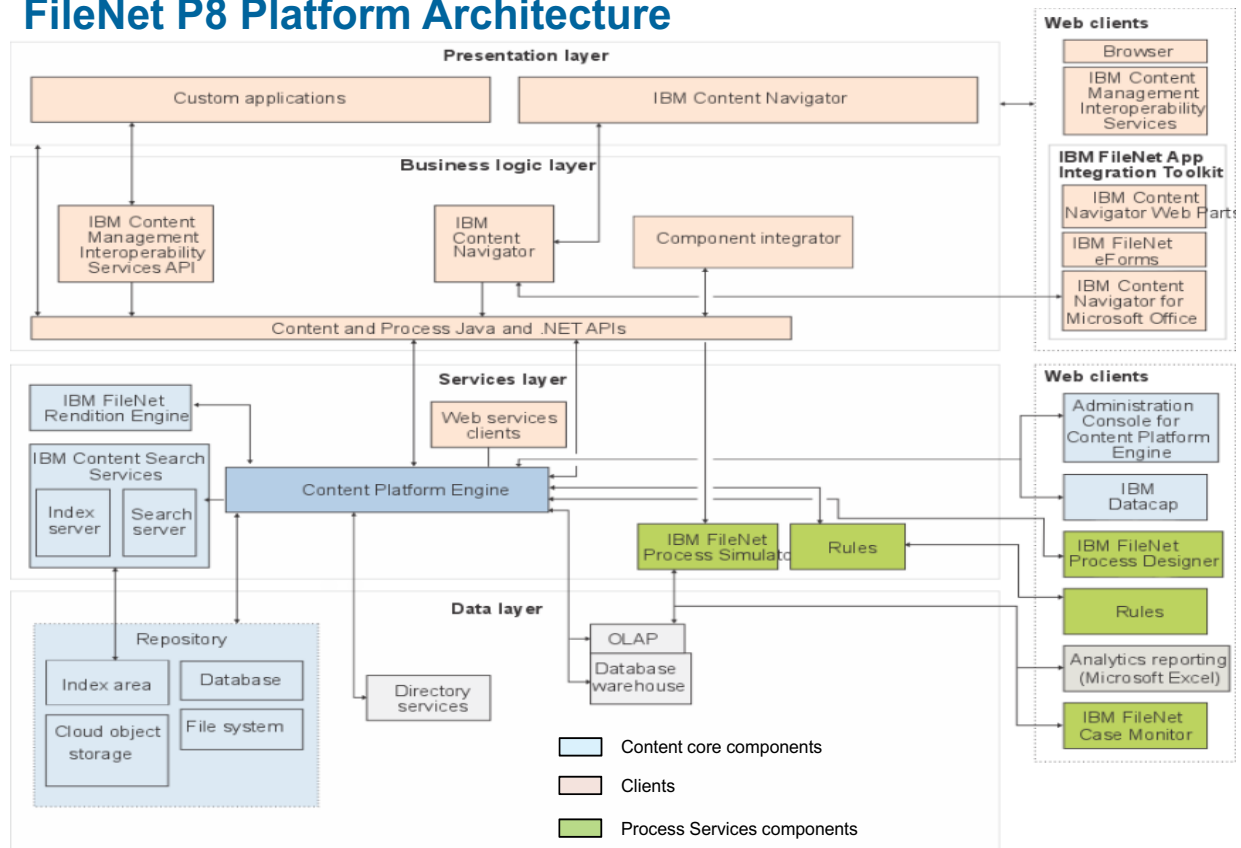
- Identify the components of an IBM FileNet Content Manager system.
- Identify the dependencies between the core components.

IBM FileNet Content Manager architecture

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Figure 2-1. Unit objectives

FileNet P8 Platform Architecture



IBM FileNet Content Manager architecture

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Figure 2-2. FileNet P8 Platform Architecture

Help path

FileNet P8 Platform 5.2.1>System overview>FileNet P8 architecture>FileNet P8 baseline architecture

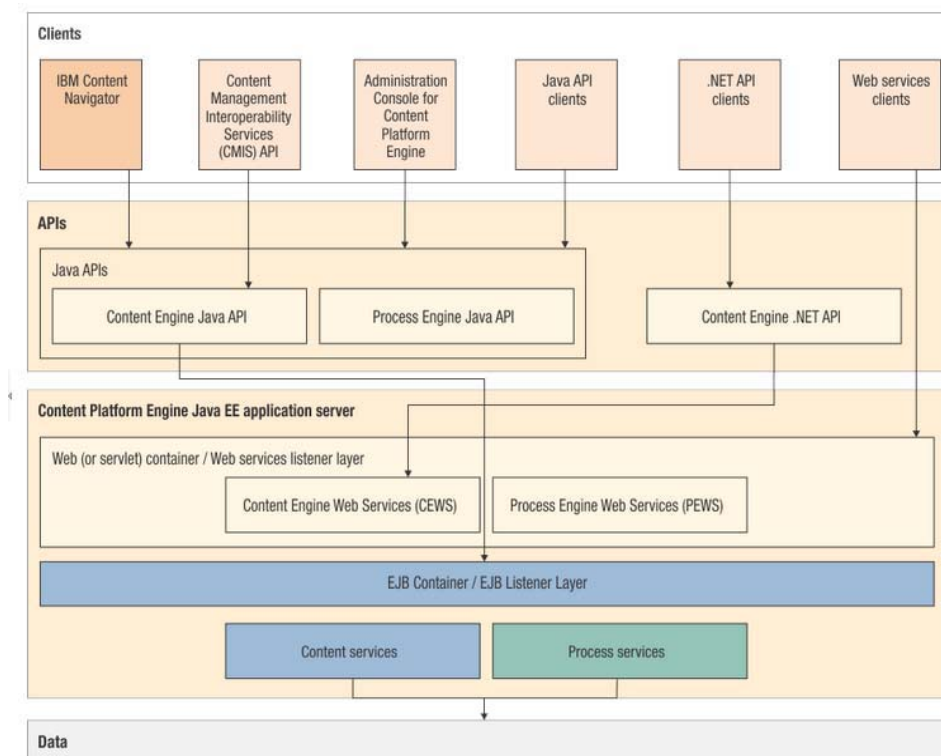
http://www.ibm.com/support/knowledgecenter/SSNW2F_5.2.1/com.ibm.p8.sysoverview.doc/p8sov154.htm

The FileNet P8 Platform includes back-end services, development tools, and applications that address enterprise content and process management requirements.

The diagram shows a high-level architecture diagram of the FileNet P8 Platform. It includes the main components and how they communicate.

The presentation layer and business logic layer, on the top, focus on the clients that connect to Content Platform Engine. IBM Content Navigator is the primary web client. The services layer in the middle includes the core components that make up IBM FileNet Content Manager. The Content Platform Engine is the core engine and is shown in a darker shade of blue. The boxes in green, are the process services components that are included with IBM Case Foundation. The rectangles in gray are extra products that IBM FileNet Content Manager can integrate with, for example IBM Datacap.

Content Platform Engine architecture



IBM FileNet Content Manager architecture

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Figure 2-3. Content Platform Engine architecture

Help path

FileNet P8 Platform 5.2.1>System overview>FileNet P8 architecture>Content Platform Engine

http://www.ibm.com/support/knowledgecenter/SSNW2F_5.2.1/com.ibm.p8.sysoverview.doc/p8sov108.htm

Content Platform Engine is a FileNet P8 Platform component that is designed to handle the heavy demands of a large enterprise. It can manage enterprise-wide workflow objects, custom objects, and documents by offering powerful and easy-to-use administration tools. Using these tools, an administrator can create and manage the classes, properties, storage, and metadata that form the foundation of an enterprise content management (ECM) system.

The following diagram provides an overview of the Content Platform Engine architecture. Key architectural aspects include:

- Application programming interfaces (APIs)
 - Provide an extensible platform for development and cross-object store queries, and lets administrators configure systems programmatically. A Java based API provides a rich set of Java™ classes that map to object store objects, such as Document, Folder, or Property Description; a Web Service API allows customers to author applications in a platform and language independent manner that expose the object model in a few generic methods

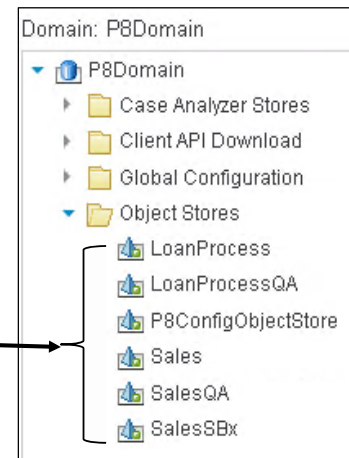
suitable for deployment in a web environment; a Microsoft .NET framework-based API, functionally equivalent to the Java based API, provides for development of applications that use the .NET framework.

- Java EE-compliant application server
 - Java Platform, Enterprise Edition (Java EE) offers reliability, scalability, and high availability features, and support for a wide range of operating system platforms, application servers, and database technologies.
- Scalable
 - Can be deployed to suit the demands of the enterprise. As the enterprise's needs change, you can reconfigure the system by replacing, adding, or removing servers or applications without bringing the system down. You can add members to web server clusters and Content Platform Engine server clusters at any time.
- Content services
 - Responsible for adding and deleting content and retrieving objects and content from an object store. In addition to servicing requests from enterprise content management (ECM) applications, the content services host various background tasks that maintain all the resources that are associated with each object store.
- Process services
 - Provide software services for managing all aspects of business processes (also called workflows), such as workflow execution, workflow routing, rules management, process simulation and modeling, and workflow analysis.

Content Platform Engine resources

- FileNet P8 Domain
 - Global Configuration Data
 - One or more Object stores
- Object store components
 - An object store is a repository used to store content and objects.
 - Each object store contains:
 - Metadata.
 - One or more storage areas
 - One workflow system - optional.
- Configuration tools
 - Administrative Console for the Content Platform Engine
 - FileNet Configuration Manager
 - Deployment Manager

One or more
Object stores



IBM FileNet Content Manager architecture

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Figure 2-4. Content Platform Engine resources

Help path

FileNet P8 Platform 5.2.1>Administering>Administering Content Platform Engine>Defining the FileNet P8 infrastructure>FileNet P8 domains

http://www.ibm.com/support/knowledgecenter/SSNW2F_5.2.1/com.ibm.p8.ce.admin.tasks.doc/abotem/dom_concepts.htm

FileNet P8 Platform 5.2.1>Administering>Administering Content Platform Engine>Defining the FileNet P8 infrastructure>FileNet P8 domains>FileNet P8 domain structure

http://www.ibm.com/support/knowledgecenter/SSNW2F_5.2.1/com.ibm.p8.ce.admin.tasks.doc/abotem/aem_domain_structure.htm

The FileNet P8 domain contains the entities that represent the Content Platform Engine physical resources (such as object stores) and the Content Platform Engine servers that provide access to those resources.

The FileNet P8 domain represents a logical grouping of physical resources and the Content Platform Engine servers that provide access to those resources. Each resource and server belong to only one domain. A server can access any resource in the domain, but cannot access any resource that lies outside of the domain.

Each FileNet P8 Domain contains:

- Global Configuration data (GCD) that contains domain level configuration and properties.
- One or more object stores.

The screen capture on the right, shows the view of a FileNet P8 domain as seen in Administration Console for Content Platform Engine (ACCE). The Object Stores folder is expanded and shows six object stores.

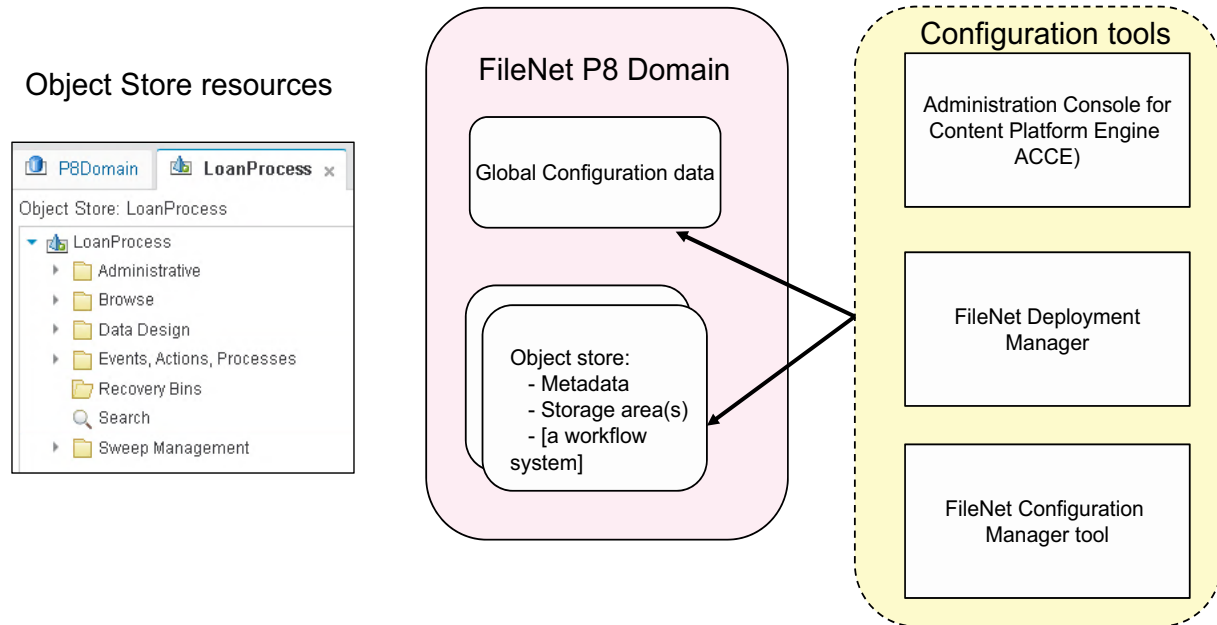
An object store is a repository for storing objects (such as documents, folders, and business objects) and the metadata that defines the classes and properties of objects. Each object store contains:

- Metadata
- One or more storage areas. The following storage area types are supported:
 - Database – Content Platform Engine stores both the objects and the content for those objects in the same database.
 - File - Area that contains document content in a directory tree on a local or shared network drive. The disk drive can be a Windows NTFS volume, a UNIX file system, or an IBM General Parallel File System (GPFS)
 - Fixed - an external (non FileNet P8) fixed content system that provides storage and data retention.
 - Advanced - provides high availability content storage and disaster recovery through use of replication and replica repair.
- Optional workflow system - A workflow system is a collection of isolated regions. An isolated region contains the queues, rosters, and event logs that are necessary to create and process workflows.

The Content Platform Engine provides tools to help with administration and maintenance.

- Administration Console for Content Platform Engine is a web tool used to administer and configure a FileNet P8 Domain.
- FileNet Configuration Manager is a graphical user interface to configure and deploy Content Platform Engine instances on an application server. It is generally used during initial installation and configuration or upgrades.
- FileNet Deployment Manager (FDM) is a tool used to move data from one object store to another. FDM is generally used to move IBM FileNet Content Manager applications from one environment to another. For example, from development to Quality Assurance, and then to Production.

Content Platform Engine resources (2)



IBM FileNet Content Manager architecture

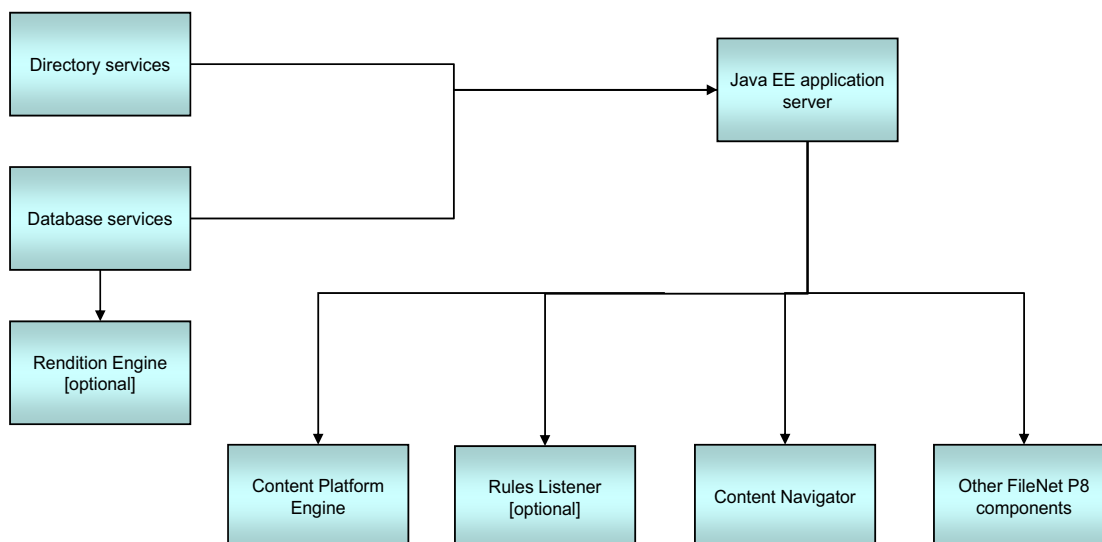
© Copyright IBM Corporation 2016

Figure 2-5. Content Platform Engine resources (2)

The screen capture on the left, shows the high-level folder structure of an object store, as seen from ACCE.

The diagram in the middle, is a high-level representation of a FileNet P8 domain. The diagram on the right, shows the three configuration tools that are included with IBM FileNet Content Manager. Each of the configuration tools access the Global Configuration data and the object stores' objects and metadata.

Component relationships



IBM FileNet Content Manager architecture

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Figure 2-6. Component relationships

Help path

FileNet P8 Platform 5.2.1>Administering>Starting and stopping FileNet P8 components>Getting started>Component relationships

http://www.ibm.com/support/knowledgecenter/SSNW2F_5.2.1/com.ibm.p8.common.admin.doc/startup_shutdown/component_relationships.htm

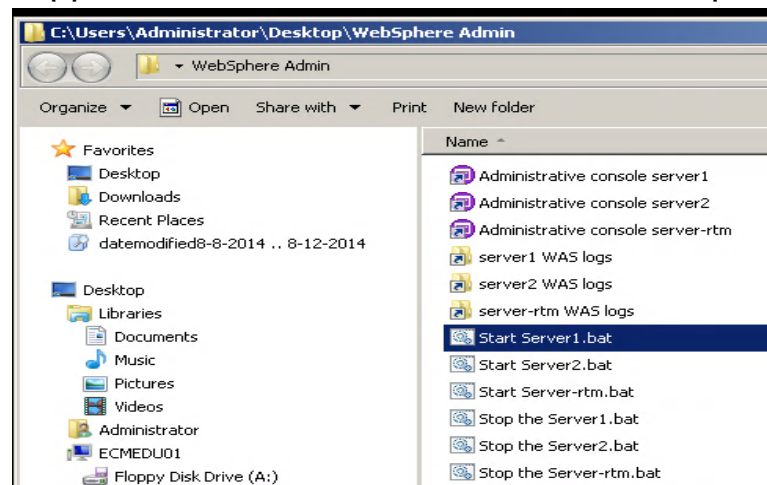
The IBM FileNet Content Manager components are interdependent. Although most components do not require other components be running to start successfully, the absence of other components can affect processing.

Generally, start the components and related servers in the order outlined in the diagram. Reverse the order to shut down.

The Content Platform Engine servers run as applications within a Java EE application server, so the Java EE application server must be started first. However, it is common to configure the Content Platform Engine applications to automatically start when the application server starts.

On your student system

- Windows Services
 - Directory Services
 - Database services
- IBM FileNet Content Manager components start automatically when WebSphere Application Server starts.
- WebSphere Application Server starts from a batch script.



IBM FileNet Content Manager architecture

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Figure 2-7. On your student system

On your student system, the Directory Services and the database services startup as windows services when the operating system starts up.

The IBM FileNet Content Manager components are configured to start automatically when WebSphere Application Server starts.

A batch script starts WebSphere Application Server.

Unit summary

- Identify the components of an IBM FileNet Content Manager system.
- Identify the dependencies between the core components.

Review questions



1. What is the core engine of the FileNet P8 Platform?
 - A. Content Platform Engine
 - B. FileNet Content Foundation
 - C. Rendition Engine
 - D. IBM FileNet Content Manager

2. Which component provides the default client interface for the FileNet P8 Platform?
 - A. IBM Content Navigator
 - B. Component integrator
 - C. Content Platform Engine
 - D. IBM Datacap

IBM FileNet Content Manager architecture

Figure 2-9. Review questions

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Write your answers here:

- 1.
- 2.

Review questions



3. Which service in the Content Platform Engine is responsible for adding and deleting content?
 - A. Process services
 - B. Content Federation services
 - C. Content Management interoperability services
 - D. Content services

4. Each FileNet P8 domain contains one or more object stores and what else?
 - A. Content Platform Engine
 - B. Administration Console for Content Platform Engine
 - C. Global Configuration data
 - D. Repositories

IBM FileNet Content Manager architecture

Figure 2-10. Review questions

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Write your answers here:

3.

4.

Review answers



1. What is the core engine of the FileNet P8 Platform?

- A. Content Platform Engine
- B. [FileNet Content Foundation](#)
- C. Rendition Engine
- D. IBM FileNet Content Manager

The answer is [B](#).

2. Which component provides the default client interface for the FileNet P8 Platform?

- A. [IBM Content Navigator](#)
- B. Component integrator
- C. Content Platform Engine
- D. IBM Datacap

The answer is [A](#).

Review answers



3. Which service in the Content Platform Engine is responsible for adding and deleting content?

A. Process services
B. Content Federation services
C. Content Management interoperability services
D. [Content services](#)

The answer is [D](#).

4. Each FileNet P8 domain contains one or more object stores and what else?

A. Content Platform Engine
B. Administration Console for Content Platform Engine
C. [Global Configuration data](#)
D. Repositories

The answer is: [C](#).

Exercise: Find the applications used by IBM FileNet Content Manager

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Figure 2-13. Exercise: Find the applications used by IBM FileNet Content Manager

Exercise introduction

- Explore the core IBM FileNet Content Manager applications in WebSphere Application Server.



Unit 3. Administration Console for Content Platform Engine

Estimated time

00:20

Overview

In this unit, you use the Administration Console for Content Platform Engine (ACCE) to locate P8 domain objects. Such as object stores, folders, classes, property templates, and global configuration properties.

How you will check your progress

- Successfully complete the lesson exercises.

References

Knowledge Center

<http://www.ibm.com/support/knowledgecenter/SSNW2F/welcome>

<http://www.ibm.com/support/knowledgecenter/SSEUEX/welcome>

Unit objectives

- Use Administration Console for Content Platform Engine to locate FileNet P8 domain objects.

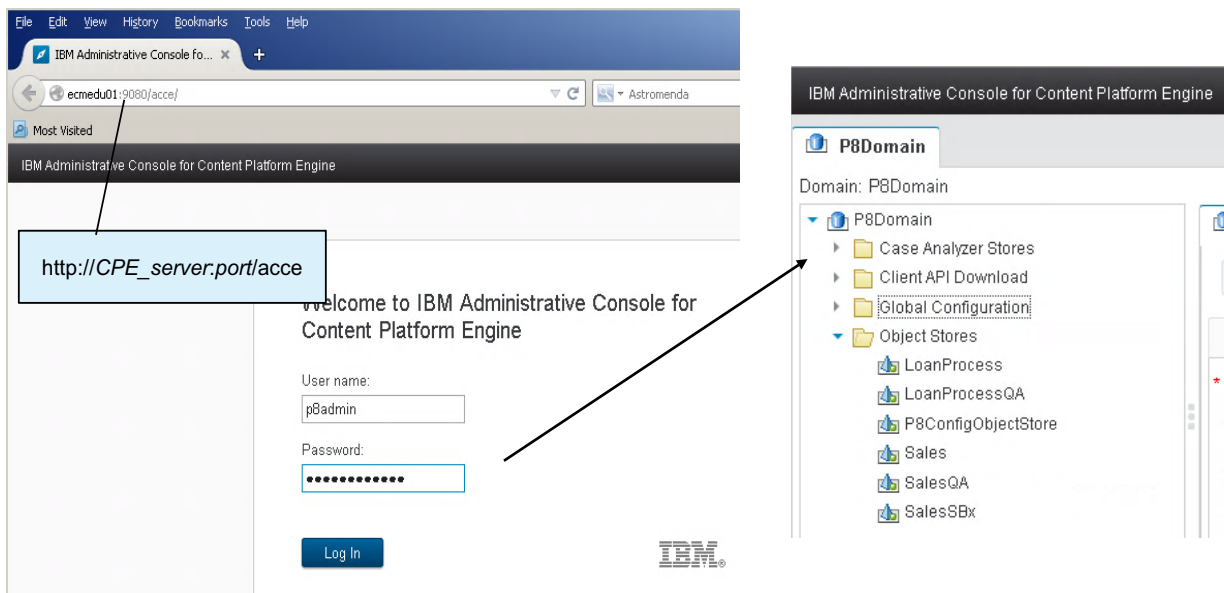
Administration Console for Content Platform Engine

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Figure 3-1. Unit objectives

Administration Console for Content Platform Engine

- Web application used to administer FileNet P8 domains.
 - Global Configuration data (GCD)
 - Object stores
 - Other objects



Administration Console for Content Platform Engine

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Figure 3-2. Administration Console for Content Platform Engine

Help path

FileNet P8 Platform 5.2.1>Administering>Administering Content Platform Engine>Getting started

http://www.ibm.com/support/knowledgecenter/SSNW2F_5.2.1/com.ibm.p8.ce.admin.tasks.doc/aboutacce/acce_intro.htm

The Administration Console for Content Platform Engine, often referred to as ACCE (pronounced ace), is a web-based application used to administer FileNet P8 domains and their resources.

- Global Configuration data (GCD)
- Object stores
- Other objects

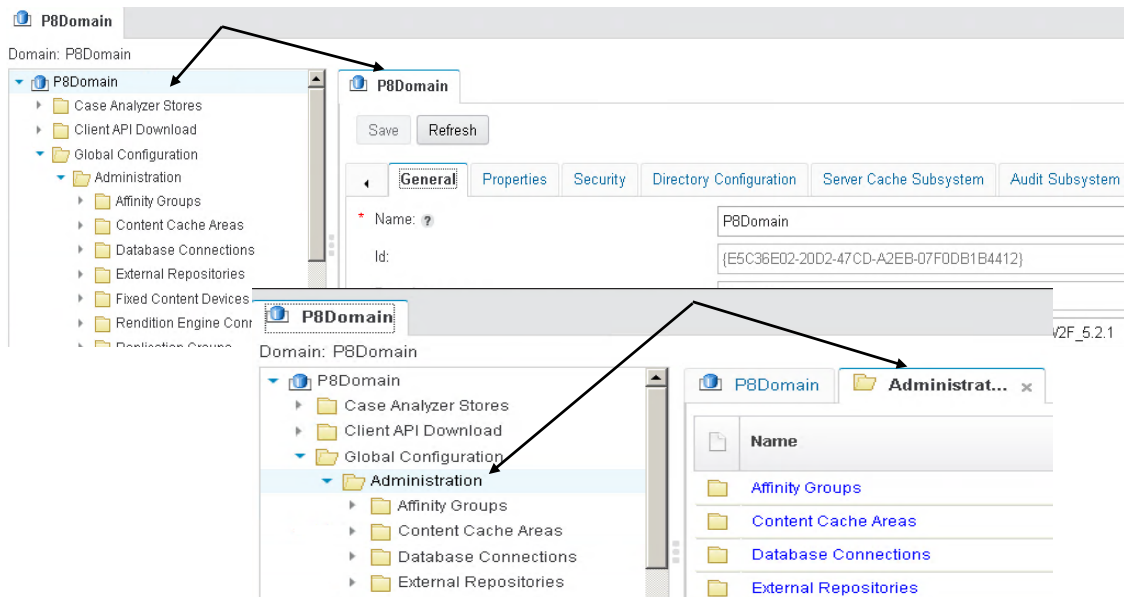
ACCE is an application that runs on a Java EE application server. To start ACCE, you use a web browser to go to the URL shown on the screen capture in the blue callout. The Welcome screen displays, as shown in the screen capture on the left. You log in with an account with read access to the FileNet P8 domain. The FileNet P8 Domain navigation is displayed, on the right. The screen capture shows six object stores under the object stores node.

ACCE was introduced in IBM FileNet Content Manager 5.2. Previous releases used FileNet Enterprise Manager (FEM) to do the administration. FileNet Enterprise Manager was removed

starting with IBM FileNet Content Manager 5.2.1. If an older release of IBM FileNet Content Manager is upgraded, FEM is still there. New installations do not include FEM.

Navigating ACCE

- Click a node in the left navigation
- A tab opens on the right



Administration Console for Content Platform Engine

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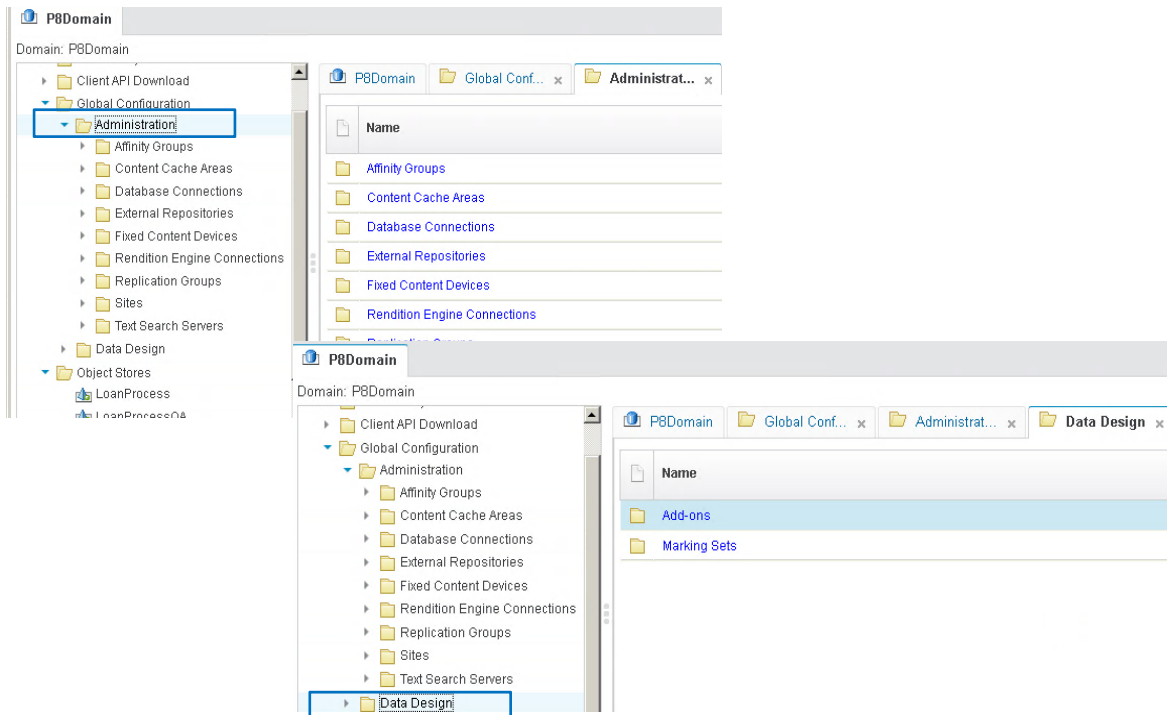
Figure 3-3. Navigating ACCE

To navigate the Administration Console for Content Platform Engine, you click a node on the left, which opens a tab on the right. The top screen capture shows the node, P8Domain selected on the left and the P8Domain tab on the right. The bottom screen capture, shows the Global Configuration node that is expanded and the Administration node selected on the left, which opens the Administration tab on the right.

Depending on the type of node you select, you see a list of objects that you can select on the right, or a set of properties that you can set or modify.

Global Configuration data (GCD)

- Objects and attributes that apply to the entire FileNet P8 Domain.



Administration Console for Content Platform Engine

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Figure 3-4. Global Configuration data (GCD)

The Global Configuration node contains objects, attributes, and properties that apply to the entire FileNet P8 Domain.

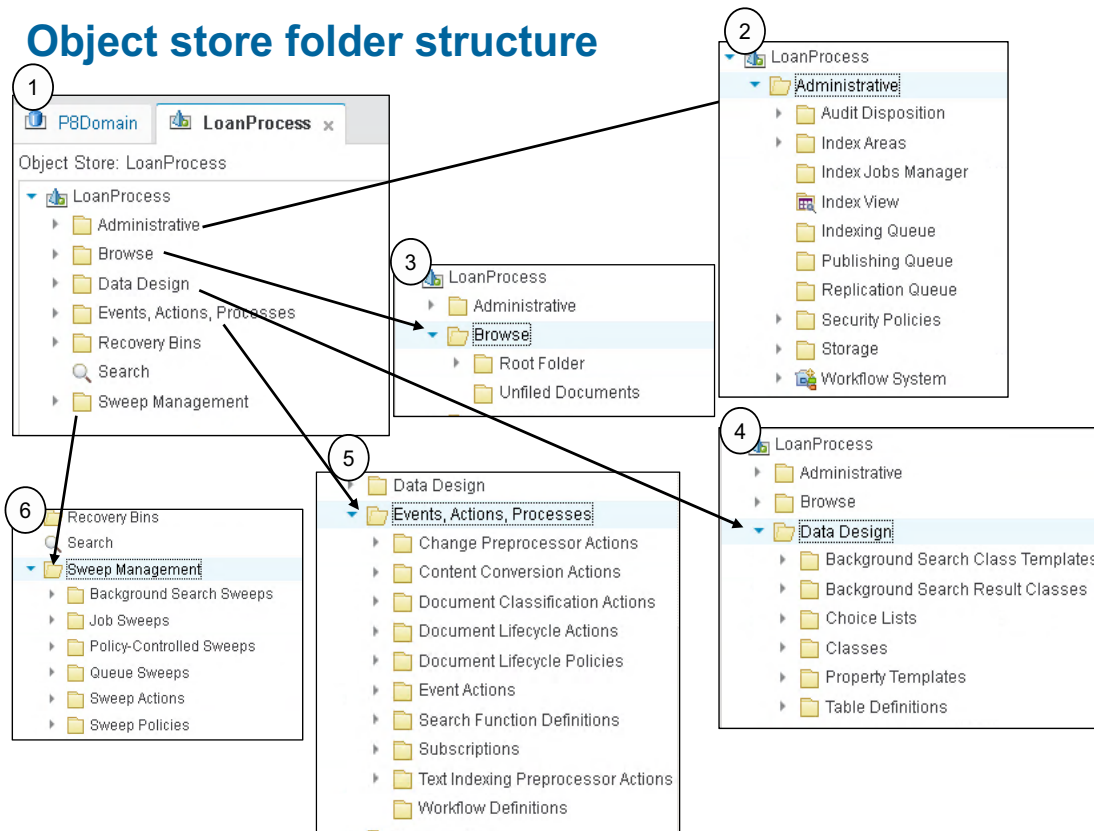
The types of data are grouped into two categories: Administration and Data Design.

The screen capture on the upper left, shows the Administration node selected. On the right, you see the types of items that are administered. For example:

- Affinity Groups
- Content Cache Areas
- Database Connections
- External Repositories
- Fixed Content Devices

The screen capture on the lower right, shows the Data Design node selected. On the right, you see Add-ons and Marking Sets.

Object store folder structure



Administration Console for Content Platform Engine

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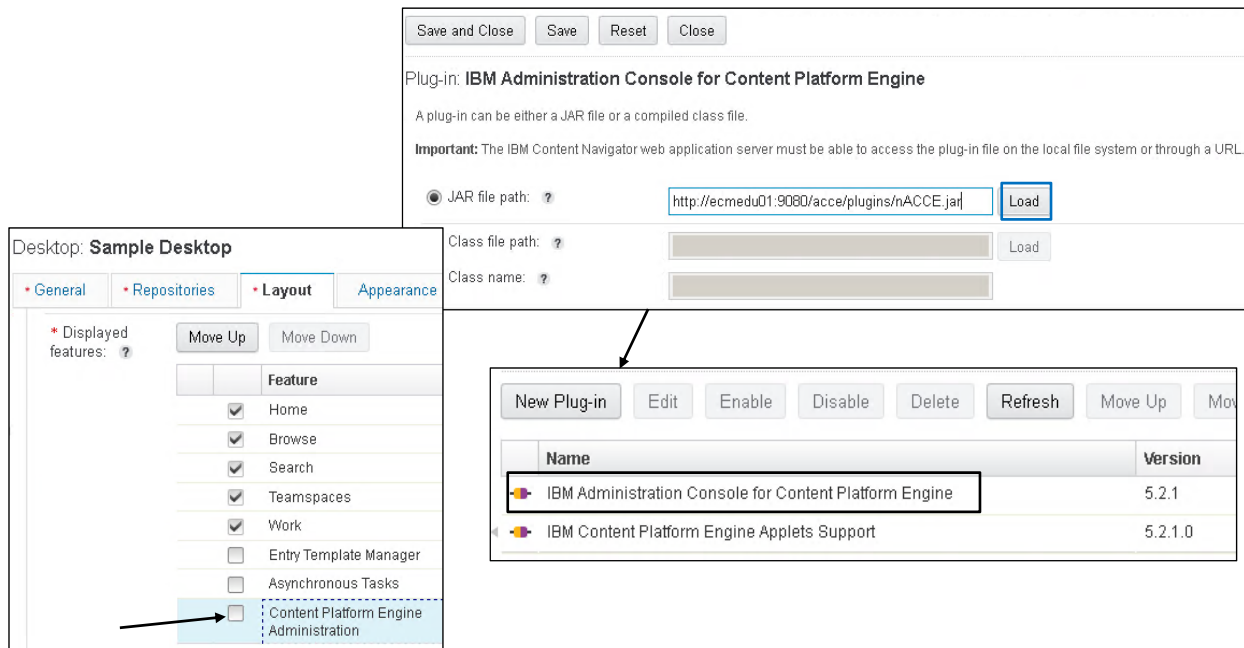
Figure 3-5. Object store folder structure

When you select an object store, from the object stores node, a tab with the object store name opens next to the tab, P8Domain. The folder structure that you see is shown in screen capture #1, upper left. The nodes are grouped into the following categories:

- **Administrative** – properties and objects associated with administering an object store (screen capture #2).
- **Browse** – folders and content that is stored in the folders, and content that is not filed in any folders (screen capture #3).
- **Data Design** – Classes, choice lists, property templates (screen capture #4).
- **Events, Actions, Processes** – Anything having to do with events, actions, lifecycle policies, subscriptions (screen capture #5).
- **Recovery Bins** – Where you configure and administer recovery bins.
- **Search** – Where you define Search templates, and assign who can run and define searches.
- **Sweep Management** – Background search sweeps, job sweeps, sweep actions (screen capture #6).

Configure ACCE as a desktop feature

- Create a single administration desktop to administer multiple applications.



Administration Console for Content Platform Engine

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Figure 3-6. Configure ACCE as a desktop feature

Help path

FileNet P8 Platform 5.2.1>Administering>Administering Content Platform Engine>Getting started>Configuring the administration console as an IBM Content Navigator desktop feature

http://www.ibm.com/support/knowledgecenter/SSNW2F_5.2.1/com.ibm.p8.ce.admin.tasks.doc/p8pcc241.htm

You can configure the Administration Console for Content Platform Engine (ACCE) as an IBM Content Navigator desktop feature. Configuring the ACCE feature is useful if you are responsible for administering various applications, such as IBM Content Navigator, Datacap, and IBM FileNet Content Manager. You can define a desktop that contains all the features to administer the various applications from one single console. You can still use the web-based tool, ACCE, as well.

To configure the feature you:

1. Register the IBM Administration Console for Content Platform Engine plug-in.
 - Open the IBM Content Navigator Administration tool.
 - Open the Plug-ins node.
 - Select New Plug-in.

- In the Plug-in screen, upper left, enter the URL shown on the screen capture. You use the Content Platform Engine server and http port number.
 - When the Plug-in is successfully registered, it is listed in the list of Plug-ins (screen capture in the middle).
2. Select the feature in the layout tab of the desktop (screen capture on the lower left).
- Open the desktops node.
 - Edit the desktop that you want to add the ACCE feature to.
 - Select the Layout tab.
 - Select the check box for Content Platform Administration.
 - Save the desktop.

Unit summary

- Use Administration Console for Content Platform Engine to locate FileNet P8 Domain objects.

Exercise: Explore Administration Console for Content Platform Engine

Administration Console for Content Platform Engine

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Figure 3-8. Exercise: Explore Administration Console for Content Platform Engine

Exercise introduction

- Locate global configuration properties.
- Locate object store folders, classes, and property templates.





IBM Training

