#### Introduction

You are going to build or maintain an Enterprise Content Management (ECM) solution for your company on an IBM FileNet P8 system. You need to be familiar with the types of solution elements that are used in business solutions and the tools that are used to work with the solution elements.

#### **Procedures**

Procedure 1, Start services on the server, page 1-5

Procedure 2, Run Workplace XT, page 1-6

Procedure 3, Add a folder and a document, page 1-7

Procedure 4, Use the Information Center, page 1-11

## Procedure 1: Start services on the server

Check the Windows Service console to make sure that Microsoft SQL Server is started.

| Smart Card Smart Card Removal Policy SIMP Trap Software Protection Special Administration Console Helper SPP Notification Service | Manages access to smart cards read by t Allows the system to be configured to loc Receives trap messages generated by lo Enables the download, installation and en Allows administrators to remotely access Provides Software Licensing activation an | Started | Manual<br>Manual<br>Manual<br>Automatic (D<br>Manual<br>Manual |
|---|---|---------|--|
| SQL Active Directory Helper Service<br>SQL Server (SQLEXPRESS)  | Enables integration with Active Directories<br>Provides storage, processing and controll  | Started | Disabled<br>Automatic  |
| SQL Server Agent (SQLEXPRESS) SQL Server Browser  | Executes jobs, monitors SQL Server, fire  Provides SQL Server connection informati  |         | Disabled<br>Manual   |
| SQL Server VSS Writer SSDP Discovery  | Provides the interface to backup/restore  Discovers networked devices and service   | Started | Automatic<br>Disabled  |
| Symantec AntiVirus  | Provides real-time virus scanning, reporti  | Started | Automatic  |
| Symantec AntiVirus Definition Watcher   | Monitors and maintains virus definitions.   | Started | Automatic  |
| Symantec Event Manager  | Event propagation and logging service   | Started | Automatic  |
| 🔍 Symantec Settings Manager   | Settings storage and management service   | Started | Automatic  |

2. Start the WebSphere application server by accessing the folder on the image desktop



and double clicking on the Start the server batch file. Wait until the startserver command completes.

# **Procedure 2:Run WorkplaceXT application**

1.Access the WorkplaceXT application

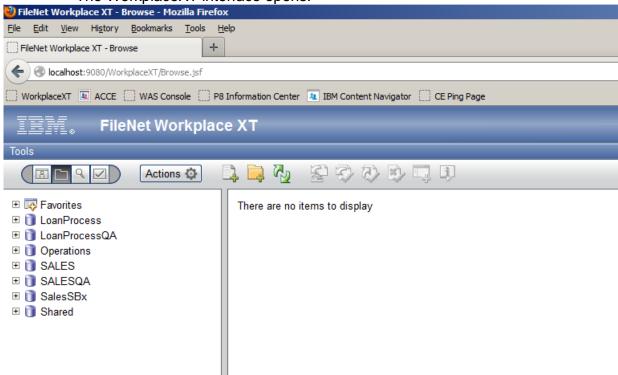
- a. Open the Mozilla Firefox browser.
- b. Click the WorkplaceXT bookmark on the Bookmarks Toolbar to open the Log in window.

Note the URL for this page:

http://localhost:WorkplaceXT/

- c. Enter your account information on the Workplace XT log in page and click Log in.
  - User name: filenetadminPassword: IBMFileNetP8
- d. Click Log in.

The WorkplaceXT interface opens.



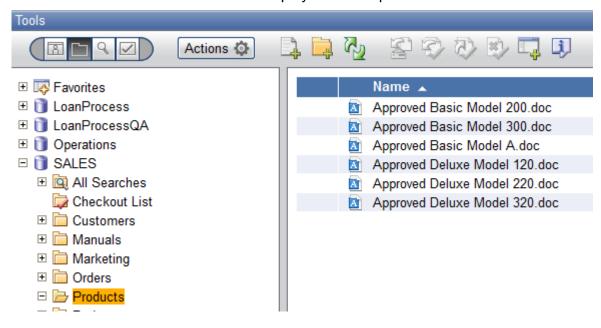
## Procedure 3:Add a folder and a document

- 1. Open the Products folder in the Sales object store.
  - a. Expand Sales object store node
  - b. Note the folders displayed below the object store:
    - All Searches
    - Checkout List
    - Customers
    - Manuals
    - Marketing

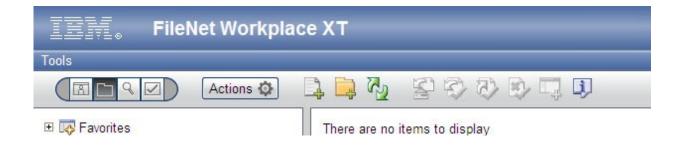
- Orders
- Products
- Projects
- Prospects
- Searches
- Workflows



c. Click on Sales > Products to display the list of product documents in this folder.



- 2.Add a subfolder named Test Folder.
  - a. Click the Add Folder icon.



The Add Folder browser window is displayed.

- b. Type Test Folder in the Folder Name field under Properties.
- c. In the lower right corner of the window, click Add.

A message is displayed indicating that the add operation succeeded for the folder.

d. Click OK to close the Add Folder window.

The folder is listed in both the left and right panes of Workplace XT.

- 3.Add a document to the new Test Folder.
  - a. In the left pane, click Products > Test Folder.
  - b. Click the Add Document icon.



The Add Document browser window opens.

- i.Browse to C:\Labs\P8Administration\ContentStorage.
- ii.Select Testfile1.doc and click Open.
- c. Click Next on the Add Document window.
- d. In the Add Document window, click Class to open the Document subclass window.



e. Select Product and click OK.

The Add Document window now displays a list of five properties with the document title already filled in.

f. Complete the Properties as shown in this table:

## Prompt Value

Document Title: Testfile1.doc

product\_id: ABC350

product\_description
gizmo model 350

price: 500.00

quantity 75

- g. Click Add.
- h. Click OK to close the Add Document window.

The document is listed in the right pane and has a Major Version of 1.

- 4.Check out the document.
  - a. Select the document name and then click the Check Out and Download icon.



The Check Out and Download Document browser window is displayed.

- b. Accept the default local directory:
  - C:\Documents and Settings\Administrator\My Documents
- c. Click Check Out and Download.
- d. Click OK to close the window.

A red check mark icon is displayed to the left of the file name to indicate that the document has been checked out.

5. Check the document back in.

a.In the right pane of Workplace XT, select the document name again and then click the Check In icon.



The Check In Document browser window is displayed.

- b. Click Browse and browse to the following folder:
  - C:\Documents and Settings\Administrator\My Documents
- c. Select Testfile1.doc and click Open.
- d. On the *Check In Document* window click *Check In*, and then click OK to close the window.

In the right pane of Workplace XT, the *Major Version* number for the Testfile1.doc is now shown as 2.

6.Log out.

- a. Click Log out to log out of Workplace XT.
- b. Minimize Workplace XT.

#### Procedure 4:Use the Information Center

- 1. Open the Information center.
  - a. Open the Mozilla Firefox browser.
  - b. Click the *P8 5.2 Info Center* bookmark on the Bookmarks Toolbar to open the Information Center. Note the URL for this page:

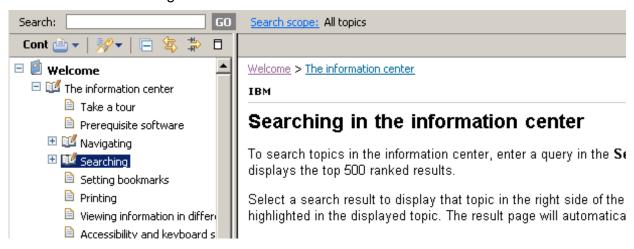
http://localhost:9080/p8docs/index.jsp

2.Examine the entry for Searching in the information center.

a. In the left pane of the browser window, expand Welcome



- b. Expand the link The information center.
- c.Click Searching.



Scroll through the entry displayed in the right pane of the browser window: Searching in the information center.

- 3.Examine the entry Administering Content Platform Engine.
  - a.In the left pane of the browser window, expand *Administering Content Platform Engine*.
    - b. Expand Administering Content Engine.
    - c.Expand Getting started:
      - Starting the administration console
      - •Updating the base documentation URL for the FileNet P8 domain
      - •Resetting message confirmation prompts
      - •The Enterprise Manager tool

Review these topics.

- d.Expand Defining the FileNet P8 infrastructure.
  - FileNet P8 domains
  - Add-on features
  - Exporting and importing (Enterprise Manager only)
  - •Importing objects in bulk
- e.Click FileNet P8 domains.

Note the entry displayed in the right pane of the browser window.

- i.Click the link FileNet P8 domain structure.
- ii. Scroll through the detailed information displayed in the right pane.
- 4. Search for a topic.
  - a. Type the following in the Search field above the Contents column and click GO.

FileNet Deployment Manager

Several hundred results are listed in the left pane below the heading Search Results.

b.Click the FileNet P8 5.2 - Concepts: About FileNet Deployment Manager link.

The selected topic is displayed in the right pane of the browser, with the search terms highlighted.

Deploying applications > Get started with FileNet Deployment Manager

IBM FileNet P8, Version 5.2

## Concepts: About FileNet Deployment Manager

Objects in an object store contain data that is specific to the environment in which the object store resides. This environment IDs and the access control lists for the objects. To import objects into a different environment, you must first update the environment in which the object store resides. This environment is environment, you must first update the environment in which the object store resides. This environment is updated in the object store resides. This environment is updated in the object store resides. This environment is updated in the object store resides. This environment is updated in the object store resides. This environment is updated in the object store resides. This environment is updated in the object store resides. This environment is updated in the object store resides. This environment is updated in the object store resides. The object is updated in the object store resides in the object store resides.

You use FileNet Deployment Manager first to create an environment definition for each of your deployment environments. As configuration information that the tool needs to connect to the environment.

You then use FileNet Deployment Manager to retrieve information that identifies the object stores, security principals, and wo environment. The tool places this information in files called half maps, which are stored along with the configuration informatic definition.

To define a specific deployment, you configure a source-destination pair that identifies the source and destination environme environment definition, which can be used in multiple source-destination pairs, might represent a source environment in one another pair. For example, if the deployment sequence is from a development environment to a test environment to a product source-destination pairs. In one pair, the test environment acts as the destination environment. In the other pair, the test environment.

5. Minimize the Information Center browser window

# **Lesson 1.2.Examine business solution components**

## Why is this lesson important to you?

You are going to build or maintain an Enterprise Content Management (ECM) solution for your company on an IBM FileNet P8 system. You need to be familiar with the types of solution elements that are used in business solutions and the tools that are used to work with the solution elements.

#### **Activities**

•Activity: Examine business solution components, page 1-17

# **Activity: Examine business solution components**

#### Introduction

In this activity, you become familiar with Enterprise Manager by reviewing object stores with the tool used to create and manage them.

Complete this activity on the Windows student system.

#### **Procedures**

Procedure 1, Sign in to Enterprise Manager and Administrative Console for Content Engine, page 1-17

Procedure 2, Examine content metadata solution components, page 1-19

Procedure 3, Examine storage management solution components, page 1-22

Procedure 4, Examine access control solution components, page 1-22

Procedure 5, Examine workflow solution components, page 1-24

Procedure 6, Examine user interface solution components, page 1-25

Procedure 7, View global configuration with Administrative Console for Content Engine

## **Procedure 1:Sign in to Administration Console for Content Engine (ACCE)**

The IBM Administrative Console for Content Engine is a browser-based content engine administration tool that can be used in any operating system environment that supports a web browser.

- 1.Run the IBM Administrative Console for Content Engine.
  - a. Open a new Firefox browser.
  - b.Click the ACCE bookmark on the Bookmarks Toolbar to open the Log In window.

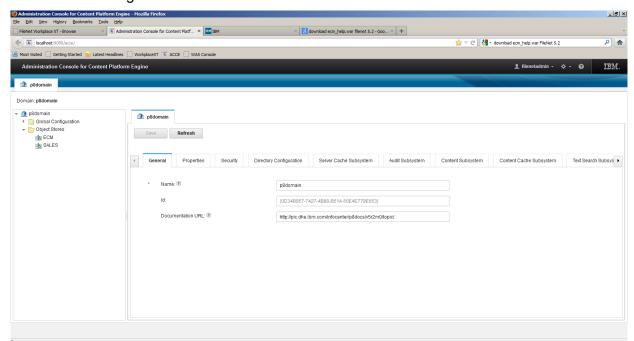
Note the URL for this page:

http://<ServerName>:9080/acce

c.Enter your account information.

User name: filenetadminPassword: IBMFileNetP8

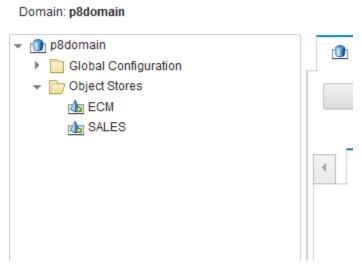
d.Click Log In.



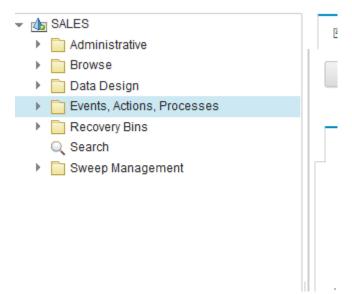
## Procedure 2: Examine content metadata solution components

- 1. View Object Stores.
  - a. Notice the top node, p8Domain, in the tree view and the nodes listed beneath it.
  - b.Expand the Object Stores node.

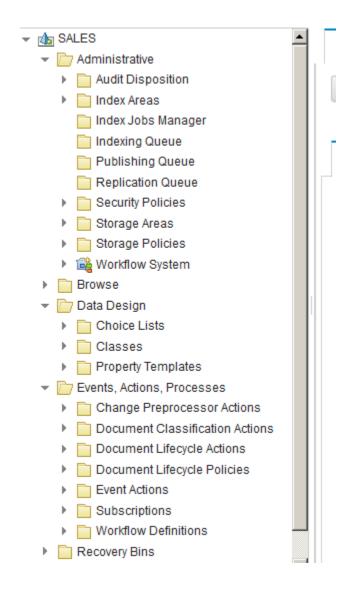
The object stores that are listed have been created on the student system.



- 2. Expand the Sales object store node.
  - a.Examine the list of nodes.



These nodes represent the metadata that can be defined for the object store



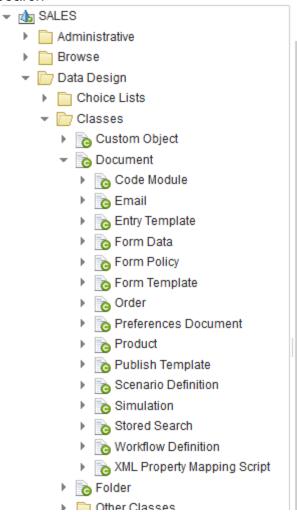
#### 3. Examine the Product document class.

a.In the left pane of the window, expand the Sales > Data Design > Classes > Document Class node.

The subclasses under the Document Class node displays both the default and user-defined document class metadata structures for the object store, including the following:

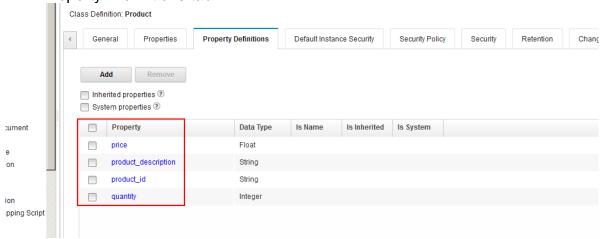
- •Code Module
- Email
- Entry Template
- Form Template
- Preferences Document
- Product

#### Stored Search



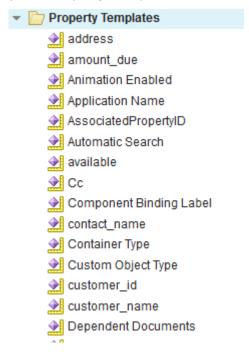
#### b.Click on the Product node.

• The properties (attributes) of the Product class are listed under the Property Definitions tab



• Recall that you were prompted for a set of values for these properties when you added the Testfile1.doc product document using Workplace XT.

- Classes contain lists of properties.
- 4.Examine the Property Templates that correspond to the properties of the Product document class.
  - a.In the left pane, expand Property Templates



b. On the right hand side, scroll down to view the property templates corresponding to the Product class:



c.Scroll down to locate the product\_id property template. Note that product\_id is a *String* data type.

5.Examine the node Browse -> Root Folder.

The Root Folder provides browse access to the content stored in the object store, in the folder hierarchy seen by users.

a.Expand the Sales > Root Folder node.

Note that there are a number of folders, including Manuals, Products, Orders, Searches, and Workflows.

b.Click the Root Folder > Products node.

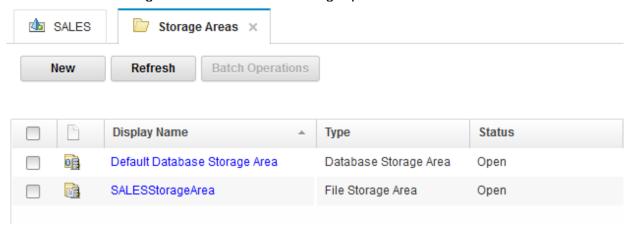
A list of documents is listed in the right pane of the window, as well as the folder Test Folder that you created in the previous lesson.

- c. Click Test Folder to open it.
  - •Note the Testfile1.doc that you added in the previous lesson is listed.
- •Note that the Major Version number is 2, the result of your checking the Testfile1.doc document out and then checking it back in.

## **Procedure 3: Examine storage management solution components**

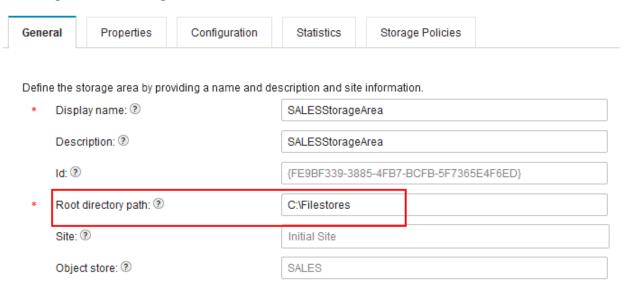
- 1. Open the Sales storage area.
  - a.Click Object Stores > Sales > Administration > Storage Areas.

Two storage areas are listed in the right pane:



b.In the right pane, click the file storage area named SalesStorageArea to open the *Properties* 

#### File Storage Area: SALESStorageArea



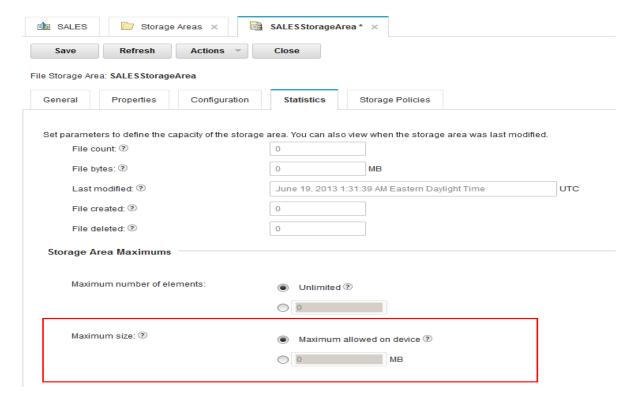
#### Note the value of the Location field:

C:\Filestores

This subdirectory is on your windows server, where the content is stored.

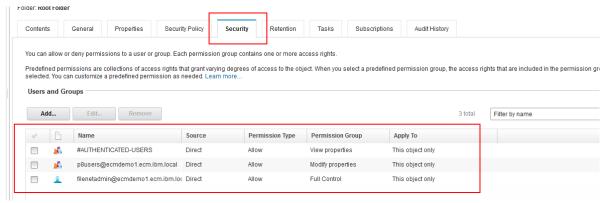
#### c.Click the Statistics tab.

•The Maximum Size is set to Maximum allowed on device.

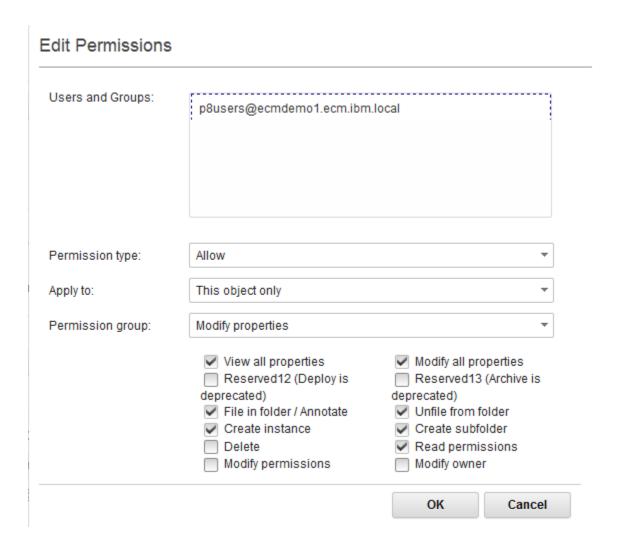


# Procedure 4: Examine access control solution components

- 1. View the security configuration of the Root Folder node in the Sales object store.
  - a.Select the Object Stores > Sales > Browse > Root Folder node.
  - b.Click the Security tab.



c. Select the p8users and click on Edit



d. Verify the settings for the P8Users entry (this is a group).

- •The Type selection is Allow.
- •The security Level selection is *Modify properties*.
- •The security Rights include *File in folder / Annotate*, *Unfile from folder*, *Create instance*, *Create subfolder*, and *Read permissions*.

Users who are members of the P8Users group are allowed to create subfolders, and to add documents to those subfolders in the Root Folder of the Sales object store.

- e.Click Cancel to close the dialog.
- 2. View the security configuration of the Root Folder > Products folder.
  - a.Select the Sales > Browse > Root Folder > Products folder.
  - b.Click the Security tab in the right pane.

- c.Select the name P8Users and click Edit.
- d. Verify the settings for the P8Users entry.
  - •The Type selection is Allow.
  - •The security Level selection is *View properties*.
  - •The security Rights include View all properties, and Read permissions.

Users who are members of the P8Users group are allowed only read access to documents in the Products folder.

e.Click Cancel to close the dialog

## **Procedure 5: Examine workflow solution components**

1. View the Workflows: Product Order Workflow.

The Workflows folder contains only those workflow definitions filed in it.

a. For the Sales object store, click Root Folder > Workflows in the left panel.

The Product Order Workflow is listed in the right pane.

b. Note the Class definition:

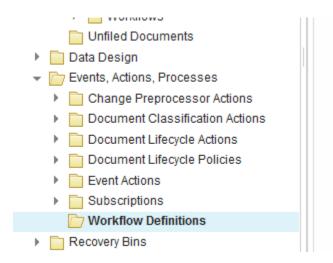
<Class: Workflow Definition>

2. View Workflow Definitions.

The Workflow definitions node displays all workflow definitions in the object store.

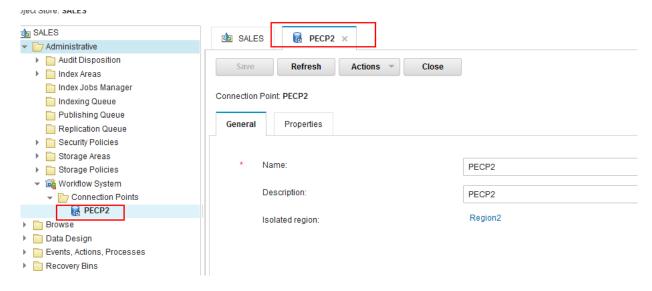
a.Click the Events, Actions, Processes > Workflow Definitions.

The workflow definition Product Order Workflow is listed in the right pane.



3. Examine the connection points and region Ids for the Workflow System

a.In the left pane, click SALES > Administrative > Workflow System > Connection Points > PECP2



- 1. Verify the Enterprise Manager log in option *Remember Password*.
  - a.Click Start > Programs > IBM FileNet P8 Platform > FileNet Enterprise Manager Administration Tool.

Click on the Properties tab to view the connection point properties

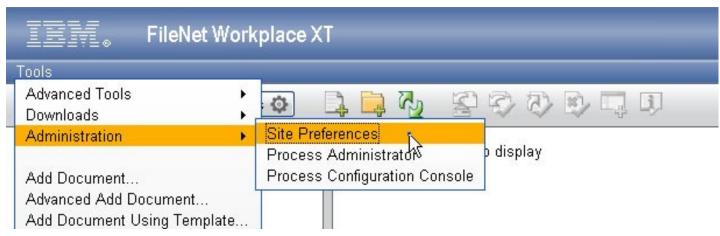
## Procedure 6:Examine user interface solution components

- 1. Open a Mozilla Firefox browser.
  - a.Run Workplace XT.
  - b.Enter your account information and click Log in.

•User name: filenetadmin
•Password: IBMFileNetP8

2. Open the Site Preferences Configuration page.

a. From the Workplace XT toolbar, click Tools > Administration > Site Preferences.



A Site Preferences Configuration browser window opens showing both User Settings and General Settings. Note that the Default Settings are listed to the right for each component.

#### b. Verify the following User Settings:

| Display             | Value              | <b>Default Settings</b> |
|---------------------|--------------------|-------------------------|
| Default list view   | Detailed           | Detailed                |
| Date format         | Short<br>(MM/d/yy) | Short (MM/d/yy)         |
| Time format         | Short<br>(h:mm a)  | Short (h:mm a)          |
| Default Search View | Simple<br>Search   | Simple Search           |
| Default home page   | Browse             | Browse                  |

#### 3. Examine the General Settings panel.

#### a. Application:

The Enable external drag and drop list selection is Yes.

#### b.Display:

The *Enable browse path tree control* list selection is **Yes**.

#### c. Verify the following Author settings:

| Names                     | Value                         | Default Settings           |
|---------------------------|-------------------------------|----------------------------|
| Add as major version      | Yes                           | Yes                        |
| Check in as major version | Yes                           | Yes                        |
| Require folder selection  | Yes                           | Yes                        |
| Security page visibility  | Show                          | Show                       |
| Authoring page display    | Workplace XT and<br>Workplace | Workplace XT and Workplace |

d.Tasks:

The *Process Engine Connection Point* list selection is **PECP2**.

- 4. Examine the Sales object store access setting.
  - a.Click Object Stores under Workplace Preferences in the left pane.
  - b.Click Sales in the right pane.

The Site Preferences panel for the object store Sales is displayed in the right pane.

c. Verify that Object Store Access Role is set to Everyone.

The selection of **Everyone** is reasonable for a training system. Access in a production system is limited to the appropriate access roles

d. Verify the following Names settings:

| Names              | Value             | Default Settings |
|--------------------|-------------------|------------------|
| Document name      | Document<br>Title | Document Title   |
| Folder name        | Folder<br>Name    | Folder Name      |
| Custom Object name | ID * (ID)         | ID * (ID)        |

Members of the Application Engine Administrator role configure site preferences such as the metadata value to be displayed for the Document name, Folder name, and Custom Object name fields.

e.In the lower right corner of the browser, click Cancel to close the Site Preferences

page.

5.Log out of Workplace XT and close the browser.

# Procedure 7:View global configuration with Administrative Console for Content Engine

The IBM Administrative Console for Content Engine is a browser-based content engine administration tool that can be used in any operating system environment that supports a web browser.

- 1.Run the IBM Administrative Console for Content Engine.
  - a. Open a new Firefox browser.
  - b.Click the ACCE bookmark on the Bookmarks Toolbar to open the Log In window.

Note the URL for this page:

http://<ServerName>:9080/acce

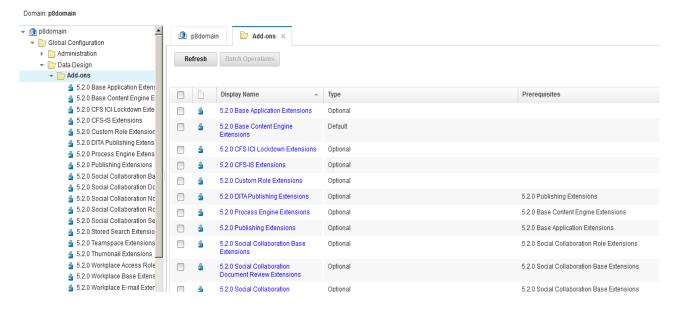
c.Enter your account information.

User name: filenetadminPassword: IBMFileNetP8

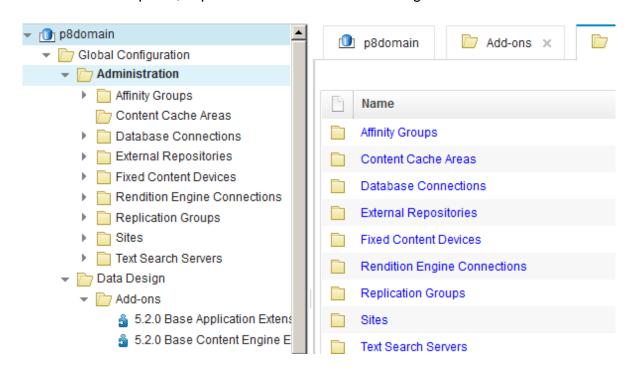
d.Click Log In.

2. View list of Add-ons.

a.In the left panel, expand P8Domain > Global Configuration > Data Design > Add-ons.



- 3. View Administration components.
  - a.In the left panel, expand P8Domain > Global Configuration > Administration.



- 4. Examine the properties of the virtual server for the system.
  - a.Expand Global Configuration > Administration > Sites > Initial Site > Virtual Servers > P8Node01.
    - b.Select server1.

The server1 Properties are listed in the right pane of the window.

5.Log out.

a.Click the Log Out link.

b.Click OK on the Log Out message:

Do you really want to log out?

# Stop and start system components: Walkthrough

## Introduction

You might occasionally need to stop and restart an individual component. In this activity, you stop and start individual FileNet components.

## **Procedures**

Procedure 1, Stop and start the Content and Process Engine, page 1-35

Procedure 2, Stop and start the Workplace XT enterprise application, page 1-38

Procedure 4, Stop and start WebSphere Application Server, page 1-41

## **Procedure 1:Stop and start the Content Engine**

Complete this procedure and the one that follows on the Windows student system.

- 1. Verify that the Content Engine is running.
  - a. Open a new Firefox browser.
  - b.Click the *CE Ping Page* bookmark on the Bookmarks Toolbar to open the *Content Engine Startup Context (Ping Page)*.

Note the URL for this page:

http://<ServerName>:9080/FileNet/Engine

- 2.Stop the Enterprise Application FileNetEngine.
  - a. Open another Firefox browser.
  - b.Click the *WAS Admin Console* link in the bookmarks toolbar to open the Integrated Solutions Console.

Note the URL for this page:

https://<ServerName>:9043/ibm/console/logon.jsp

The *Integrated Solutions Console* login page is displayed.

c.Enter your account information and click Log in.

•User ID: p8admin

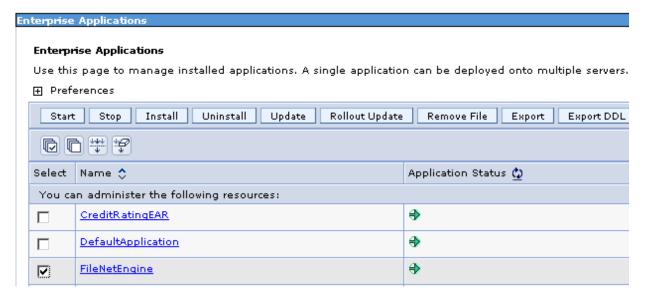
•Password: IBMFileNetP8

The Welcome page is displayed

d.In the left pane, expand the link Applications > Application Types > WebSphere enterprise applications.

The Enterprise Applications page is displayed in the right pane.

e.Select the check box for the FileNetEngine and then click Stop.



After a minute or so, the Application Status indicator changes to a red X icon indicating that the application has stopped.

- f.Minimize the browser window.
- 3. Verify that Content and Process Engine dependent applications fail to run.
  - a. Verify that the Content Engine Ping Page fails to run.
    - i.Open a new Firefox browser.
    - ii.Click the CE Ping Page bookmark on the Bookmarks Toolbar.

An error message is displayed.

iii.Close the browser.

- b. Verify that Workplace XT fails to run.
  - i.Open a new Firefox browser window.
  - ii.Click the Workplace XT bookmark on the Bookmarks Toolbar.
    - After a few moments, an error message is displayed.
  - iii.Click OK to close the message window.
  - iv.Close the browser.
- 4. Start the FileNetEngine enterprise application.
  - a.Restore the Integrated Solutions Console browser window.
  - b.Expand the link Applications > Application Types > *WebSphere enterprise applications*.
    - c.Select the check box for the FileNetEngine and then click Start.
    - •After a minute or so, a Messages box is displayed indicating that the application FileNetEngine on server server1 and node P8Node01 started successfully.
    - •The Application Status indicator changes to a green arrow icon indicating that the application has started.
    - d.Clear the check box to the left of FileNetEngine if not already cleared.
- 5.Leave the WebSphere Application Server administrative console browser open for the next procedure.

## Procedure 2:Stop and start the Workplace XT enterprise application

- 1.Stop the Workplace XT enterprise application.
  - a.In the same Enterprise Applications page of the Integrated Solutions Console (WebSphere), select the WorkplaceXT check box and click Stop.
    - Wait until the Application Status icon changes to a red X.
    - b.Minimize the WebSphere Application Server administrative console browser.
- 2.Run Workplace XT.
  - a. Open a new Firefox browser window.
  - b.Click the Workplace XT bookmark on the Bookmarks Toolbar.
    - •Note that this time you do not see the log in window.
    - •An error message is displayed in the browser.
  - c.Close the browser window.
- 3. Start the Workplace XT enterprise application.

- a.Restore the WebSphere Application Server administrative console.
- b.lf necessary expand the link Applications > Application Types > WebSphere enterprise applications.
  - c.Select the WorkplaceXT check box and click Start.
  - d. Wait until the Application Status icon changes to a green arrow.
  - e.Click *Logout* in the upper right corner.



- 4.Run Workplace XT.
  - a. Open a new Firefox browser window.
  - b.Click the Workplace XT bookmark on the Bookmarks Toolbar.
  - c.Enter your account information.
    - User name: filenetadminPassword: IBMFileNetP8
  - d.Click Log in.

FileNet Workplace XT opens.

5.Log out.

- a.Click Log out to log out of Workplace XT.
- b.Minimize the browser.

## **Procedure 3:Stop and start WebSphere Application Server**

Stopping the WebSphere server shuts down all web applications running in the web server. On the student system the web server is configured so that these same web applications start automatically.

- 1.Stop the WebSphere server.
  - a.Run the Stop server.bat file on the Desktop

The WebSphere server server1 stops.

b.Wait for the message Server server1 stop completed and when the command prompt is dismissed

2.Start the WebSphere server.

a.Run the Start server.bat file on the desktop

The WebSphere server *server1* starts.