

Managing and securing enterprise content at scale

300-level live demo preparation instructions
for Cloud Pak for Business Automation V22.0.2

Table of Contents

DEMO OVERVIEW.....	2
DEMO INSTALLATION AND SETUP.....	3
1 - Provision an OpenShift environment and deploy Cloud Pak for Business Automation	3
2 - Validate your environment	3
3 - Bookmark URLs and logins	6
4 - Execute setup script	10
5 - Prepare your document files	13
6 - Create the Teamspace template.....	13
7 - Create a finalized teamspace.....	23
PREPARE TO GIVE THIS DEMO	29
1 - Before each demo.....	29
2 - Giving the demo again	29

DEMO OVERVIEW

Scenario overview	This demo shows how IBM's content management capabilities allow organizations to securely organize, manage and collaborate on documents and other types of content. To illustrate this, we'll show how the capabilities are used to streamline a company's hiring process.
Demo products	Cloud Pak for Business Automation V22.0.2
Demo capabilities	Content Management
Demo guidance	<p>This demo script has multiple tasks that each have multiple steps. In each step, you have the details about what you need to do (Actions), what you can say while delivering this demo step (Narration), and what diagrams and screenshots you will see.</p> <p>This demo script is a suggestion, and you are welcome to customize based on your sales opportunity. Most importantly, practice this demo in advance. If the demo seems easy for you to execute, the customer will focus on the content. If it seems difficult for you to execute, the customer will focus on your delivery.</p>
Demo downloads	Installer.zip Resource files.zip P8TeamspaceTemplates.templates
How to get support	Contact https://techzone.ibm.com/help regarding issues with reserving and provisioning TechZone environments and open a helpdesk ticket. Contact #platinumdemos-automation-support regarding issues with setting up and running this demo use case.

Due to an issue with OCP 4.10.x on Tech Zone, Cloud Pak for Business Automation reservations are randomly failing. If you are unable to find the icp4adeploy-cp4ba-access-info ConfigMap in setup below (step 2), then the deployment has failed. If that happens, please delete the failed environment, and make a new reservation.

The SaaS version is quick to install but only shows a single persona (which will be you, using your intranet credentials). This ROKS/VMWare version is a more realistic scenario that shows three users collaborating. In this ROKS version, your customer will see how role-based redaction allows privileged users to see content that is hidden from other users. This demo also shows how multiple users can collaborate on and approve enterprise content.

The simpler SaaS version is not able to show these capabilities because the security requirements of the SaaS environment limit that demo to a single persona. The disadvantage of this ROKS version is that it takes longer to install. The ROKS/VMWare version has several advantages, however, that include:

- showing collaboration between multiple personas
- showing role-based security
- a great foundation you can extend into your own custom demo
- a great start for building a customer POC
- a great way for you to learn FileNet

DEMO INSTALLATION AND SETUP

1 - Provision an OpenShift environment and deploy Cloud Pak for Business Automation

To run this demonstration, you will need an OpenShift environment with Cloud Pak for Business Automation 22.0.2 installed.

You have two options to get your Cloud Pak for Business Automation 22.0.2 environment.

	Description	Opportunity number required?	CP4BA install type	Good for...	Useful link
1	Automatically installed Pak Installer CP4BA cluster	NO (allows Practice / Self-Education)	Automated by ITZ and DAFFY	those that don't need to build skills in CP4BA install	Pak Installer guide
2	Self-installed ITZ OpenShift cluster	NO (allows Practice / Self-Education)	Manual with step-by-step instructions	those that have skills in CP4BA install, want more control over the cluster's deployment, already have or wish to build familiarity with ITZ IPI/UPI clusters or want to use the latest CP4BA IFix version.	CP4BA deployment guide

2 - Validate your environment

After 5-6 hours, your Cloud Pak for Business Automation should be ready.

The setup is completed when the cp4ba access information config map is created with all the URL and credentials to log in to the various installed components.

1. Log in to your OpenShift console using the credentials provided in section 1 above.
2. Expand **Workloads** (1) and click **ConfigMaps** (2).

The screenshot shows the Red Hat OpenShift web interface. The left sidebar has a dropdown menu set to 'Administrator'. Under 'Workloads', there is a red box around 'ConfigMaps' with a red circle containing the number '1' to its right. Below 'ConfigMaps' is 'CronJobs', 'Jobs', 'DaemonSets', and 'ReplicaSets'. To the right of the sidebar is the main content area. At the top of the content area, a message says 'You are logged in as a temporary administrative user. Update the cluster OAuth configuration to allow others to log in.' Below this is the 'Overview' section under 'Cluster'. A red box surrounds the 'Workloads' menu in the sidebar. A red circle containing the number '2' is placed over the 'ConfigMaps' link in the sidebar. The main content area includes sections for 'Getting started resources', 'Status' (Cluster, Control Plane, Operators), and 'Activity' (Ongoing). There are also links for 'Build with guided documentation', 'Explore new admin features', 'API Explorer', 'OperatorHub', and 'See what's new in OpenShift 4.12'.

3. Expand **Project: All Projects** (1) and click **cp4ba-starter** (2).

The screenshot shows the Red Hat OpenShift web interface. On the left, there's a navigation sidebar with options like Home, Operators, Workloads (Pods, Deployments, DeploymentConfigs, StatefulSets, Secrets), and ConfigMaps. A red circle labeled '1' highlights the 'Project: All Projects' dropdown menu. Another red circle labeled '2' highlights the 'cp4ba-starter' project listed under the 'Projects' section.

4. Type 'access' (1). Check that the **icp4adeploy-cp4ba-access-info** (2) config map is present.

The screenshot shows the Red Hat OpenShift web interface with 'Project: cp4ba-starter' selected. On the left, the navigation sidebar includes Home, Operators, Workloads (Pods, Deployments, DeploymentConfigs, StatefulSets, Secrets), and ConfigMaps. A red circle labeled '1' highlights the search bar where 'access' is typed. A red arrow points from this search bar to the 'icp4adeploy-cp4ba-access-info' config map entry in the list, which is highlighted with a red box and has an exclamation mark icon above it. The list also includes another config map named 'icp4adeploy-odm-certificates-checksum'.

Note: If the file is not listed, wait five more minutes for the CP4BA deployment to be completed.

5. Click **icp4adeploy-cp4ba-access-info**.

The screenshot shows the Red Hat OpenShift web interface with 'Project: cp4ba-starter' selected. On the left, the navigation sidebar includes Home, Operators, Workloads (Pods, Deployments, DeploymentConfigs, StatefulSets, Secrets), and ConfigMaps. The 'ConfigMaps' list shows two entries: 'CM icp4adeploy-cp4ba-access-info' and 'CM icp4adeploy-odm-certificates-checksum'. The first entry is highlighted with a red box. A red arrow points from the 'access' filter input field in the previous screenshot to this selected config map entry.

6. Scroll down (1) and check that all the ADS access info is there. ADS is the last element to install, so your CP4BA setup is completed once this info displays.

The screenshot shows the Red Hat OpenShift web interface. On the left, a sidebar menu lists various project components: Home, Operators, Workloads (Pods, Deployments, DeploymentConfigs, StatefulSets, Secrets), ConfigMaps (selected), CronJobs, Jobs, DaemonSets, ReplicaSets, ReplicationControllers, and HorizontalPodAutoscalers. The main content area is titled "Data" and contains three sections: "ADS-designer-access-info", "ADS-runtime-access-info", and "bastudio-access-info".

ADS-designer-access-info:
ADS designer is accessed through Business Automation Studio, use URLs defined in 'bastudio-access-info' section.

ADS-runtime-access-info: (highlighted by a red box and a red arrow with an exclamation mark)
Runtime URL: <https://cpd-cp4ba-starter.apps.ocp-270002541s-yds5.cloud.techzone.ibm.com/ads/runtime/api/swagger-ui>
username: drs
password: fmb4szcv6k8j1lj6p
manager username: tk1z9k8x8cdpkjjl
manager password: xj4c5f8k5fv1klj6
monitor username: vvxxv8sg9zt15sw
monitor password: k72dd5nfh8xvmq2k

bastudio-access-info:
Cloudpак Dashboard: <https://cpd-cp4ba-starter.apps.ocp-270002541s-yds5.cloud.techzone.ibm.com>
User credentials:

3 - Bookmark URLs and logins

This demo shows how IBM Content Navigator manages content. A web-based console provides end-users the capability to securely access and work content assets, individually or with a team.

In this section, you will collect the links to access the required capabilities and use them to make a cheat sheet to use throughout the demo.

This is a sample completed cheat sheet:

Managing and securing enterprise content at scale
400-level live demo (ROKS)

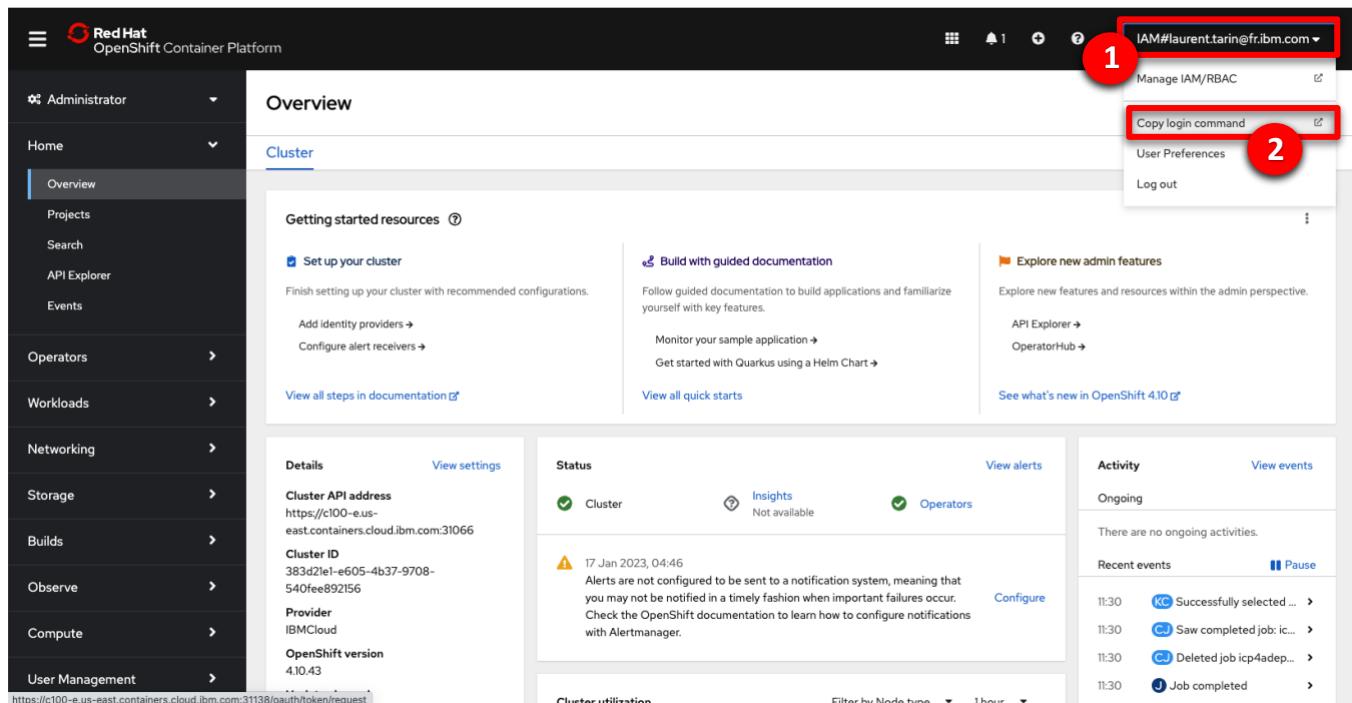
Admin token: sha256~ZdQ97qh5gihSgQ-eqexQ67WA-4y-KeSVDC_1EoGD4xs
Admin URL: <https://c118-e.us-south.containers.cloud.ibm.com:32580>

IBM Content Navigator
URL: <https://cpd-cp4ba.itzroks-50eb7f6cp8-4z96ft-6ccd7f378ae819553d37d5f2ee142bd6-0000.us-south.containers.appdomain.cloud/icn/navigator/>

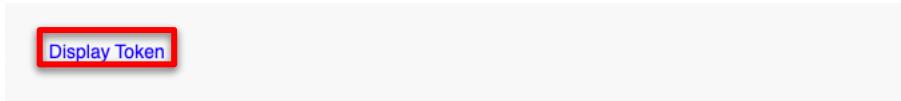
Username: cp4admin
Password: G9PoOs0RcXZnRhLZyNff

Let's collect the URLs and passwords for the demo cheat sheet.

1. Log in your OpenShift console using the credentials provided in section 1 above.
2. Expand your user menu (1) and click **Copy login command** (2).



3. Click **Display Token**.



4. Copy the **admin token** login (1) and the **admin server URL** (2) in your cheat sheet.

The screenshot shows the "Your API token is" section. It displays a token string: sha256~mYEL5t4KIfyJdlTD00ZNhBkUTMnfVsKZG767rPgHndU. Two parts of the page are highlighted with red boxes and circles: (1) the CLI command above the token, and (2) the admin server URL below the token.

Your API token is
sha256~mYEL5t4KIfyJdlTD00ZNhBkUTMnfVsKZG767rPgHndU

Log in with this token 1
oc login --token=sha256~mYEL5t4KIfyJdlTD00ZNhBkUTMnfVsKZG767rPgHndU -server=https://c100-e.us-east.containers.cloud.ibm.com:31066

Use this token directly against the API 2
curl -H "Authorization: Bearer sha256~mYEL5t4KIfyJdlTD00ZNhBkUTMnfVsKZG767rPgHndU" "https://c100-e.us-east.containers.cloud.ibm.com:31066/apis/user.openshift.io/v1/users/~"

Request another token

5. Close the tab in your browser to return to the ROKS admin page.

6. Click **ConfigMaps**.

The screenshot shows the Red Hat OpenShift Container Platform Overview page. The left sidebar has a "Workloads" section with "ConfigMaps" highlighted with a red box. The main content area shows the "Cluster" overview, including details like Cluster API address, Cluster ID, Provider (IBMCloud), and OpenShift version (4.10.26). There are also status indicators for Cluster and Insights, and two warning messages at the bottom.

Red Hat OpenShift Container Platform

Administrator

Home

Overview

Projects

Search

API Explorer

Events

Operators

Workloads

Pods

Deployments

DeploymentConfigs

StatefulSets

Secrets

ConfigMaps

CronJobs

Jobs

Overview

Cluster

Getting started resources ②

Set up your cluster

Finish setting up your cluster with recommended configurations.

Add identity providers →

Configure alert receivers →

View all steps in documentation ↗

Build with guided documentation

Follow guided documentation to build applic with key features.

Monitor your sample application →

Get started with Quarkus using a Helm Cl

View all quick starts

Details

View settings

Cluster API address
https://c108-e.eu-
gb.containers.cloud.ibm.com:30058

Cluster ID
2ba006ac-1926-46bc-b038-5a2d0bef3a66

Provider
IBMCloud

OpenShift version
4.10.26

Update channel

Status

Cluster

Insights
Not available

20 Sept 2022, 15:15
Deprecated API that will be removed in the next EUS v
the workload that is using the batch.v1beta1/cronjobs A
successful upgrade to the next EUS cluster version. Re
cronjobs.v1beta1.batch -o yaml` to identify the workloa

20 Sept 2022, 15:08
Deprecated API that will be removed in the next EUS v

7. Expand Project: All Projects (1) and select cp4ba-starter (2).

The screenshot shows the Red Hat OpenShift Container Platform web interface. The left sidebar is open, showing various navigation options like Home, Overview, Projects, Search, API Explorer, Events, Operators, Workloads, Pods, Deployments, DeploymentConfigs, StatefulSets, Secrets, ConfigMaps, CronJobs, Jobs, DaemonSets, ReplicaSets, and ReplicationControllers. A red box labeled '1' highlights the 'Project: All Projects' dropdown menu. Another red box labeled '2' highlights the 'cp4ba-starter' project in the list of projects.

Namespace	Size	Created
openshift-marketplace	3	20 Apr 2023, 18:34
cp4ba-starter	0	20 Apr 2023, 18:45
openshift-marketplace	3	20 Apr 2023, 18:34
1c	8	20 Apr 2023, 19:42
openshift-storage	0	20 Apr 2023, 16:25
4	36	20 Apr 2023, 16:24
3	10	20 Apr 2023, 18:55
5	2	20 Apr 2023, 19:00
CM 40da8afcb8idd039c0cef4e35bbe292eb22 3b0a6ca867cc6e9792c82ce899ba	2	20 Apr 2023, 18:35
CM 54a5103c2727eeef8c9ebbd3fb8ef924ce7 9bc4c45b53594200c02defafab	8	26 Apr 2023, 13:13
CM 55a14a9ca9f4a078d837007adf263a99900 b3173c6ba67bc612a719aec021de	5	20 Apr 2023, 18:34

8. Type 'access' in the search field (the results will automatically filter).

The screenshot shows the Red Hat OpenShift Container Platform web interface, specifically the 'ConfigMaps' section for the 'cp4ba-starter' project. The search bar at the top has 'access' typed into it, which filters the results. A red box highlights the search bar. The table below shows two entries: 'icp4adeploy-cp4ba-access-info' and 'icp4adeploy-odm-certificates-checksum'.

Name	Size	Created
CM icp4adeploy-cp4ba-access-info	14	26 Apr 2023, 17:49
CM icp4adeploy-odm-certificates-checksum	1	20 Apr 2023, 21:23

9. Click the **icp4adeploy-cp4ba-access-info** ConfigMap.

The screenshot shows the Red Hat OpenShift Container Platform web interface, displaying the details of the 'icp4adeploy-cp4ba-access-info' ConfigMap. The search bar at the top has 'access' typed into it. A red box highlights the search bar. The table below shows the configuration for this ConfigMap.

Name	Value	Created
CM icp4adeploy-cp4ba-access-info	14	26 Apr 2023, 17:49
CM icp4adeploy-odm-certificates-checksum	1	20 Apr 2023, 21:23

10. Scroll to the **navigator-access-info** (1) section. Copy the **Business Automation Navigator for CP4BA URL** (2) to your cheat sheet as the Business Automation Studio URL. Copy the **password** (3) to your cheat sheet as well.

Note: This is the cp4admin user's password for IBM Content Navigator and Business Automation Studio.

The screenshot shows the Red Hat OpenShift Container Platform interface. The left sidebar is titled "Administrator" and includes sections for Home, Projects, Search, API Explorer, Events, Operators, Workloads, StatefulSets, and Secrets. The main content area displays a "Project: cp4ba-starter" dashboard. At the top, it says "You are logged in as a temporary administrative user. Update the cluster OAuth configuration to allow others to log in." Below this, there are several sections: "ier-access-info", "navigator-access-info", "odm-access-info", and "taskmanager-access-info". The "navigator-access-info" section is highlighted with a red box and contains two URLs: "Business Automation Navigator for CP4BA: https://cpd-cp4ba-starter.apps.daffy-c4rw7grq.cloud.techzone.ibm.com/icn/navigator/" and "Business Automation Navigator for FNCM: https://navigator-cp4ba-starter.apps.daffy-c4rw7grq.cloud.techzone.ibm.com/navigator/". A note below states "(Note: Above URL is meant to be used when only CP4BA capability is installed)". The "password" for the cp4admin user is also listed here: "username: cp4admin" and "password: Ca5sq2ewpa45K4xkjf1". A red arrow points from the number 1 in the list above to the "navigator-access-info" section. Another red box surrounds the URLs and the password information, with the number 2 pointing to it. A third red box surrounds the entire "navigator-access-info" section, with the number 3 pointing to it.

4 - Execute setup script

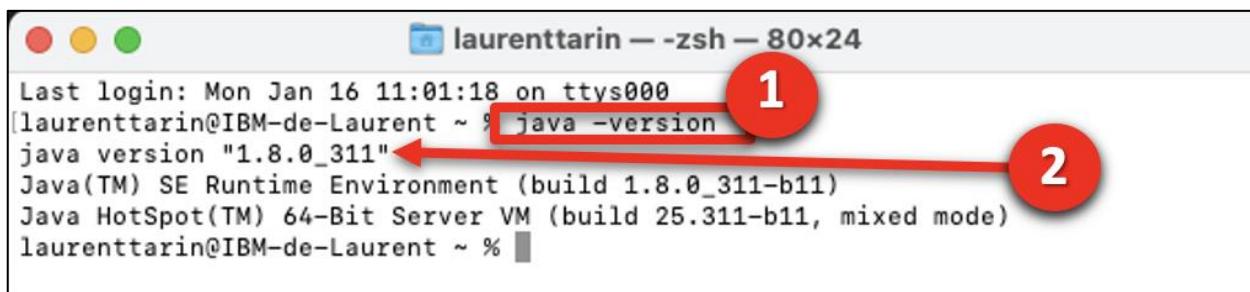
A script will help you configure the IBM FileNet Content Manager and IBM Cloud Pak for automation in just one click. Some remaining IBM Content Navigator configurations will be manual.

This automated configuration script uses the FNCM and CP4BA public APIs to:

1. Create in the platform the three personas used in this scenario: Henry (the HR Manager), Debby (the hiring Manager), and Patrick (the payroll Manager). Let's configure the individual accounts for Henry, Debby, and Patrick.
2. Create the document data model in FileNet Content Manager
3. Configure the built-in workflows used to validate documents
4. Create and dedicated Desktop in IBM Content Navigator
5. Configure role-based redactions
6. Create a document entry template

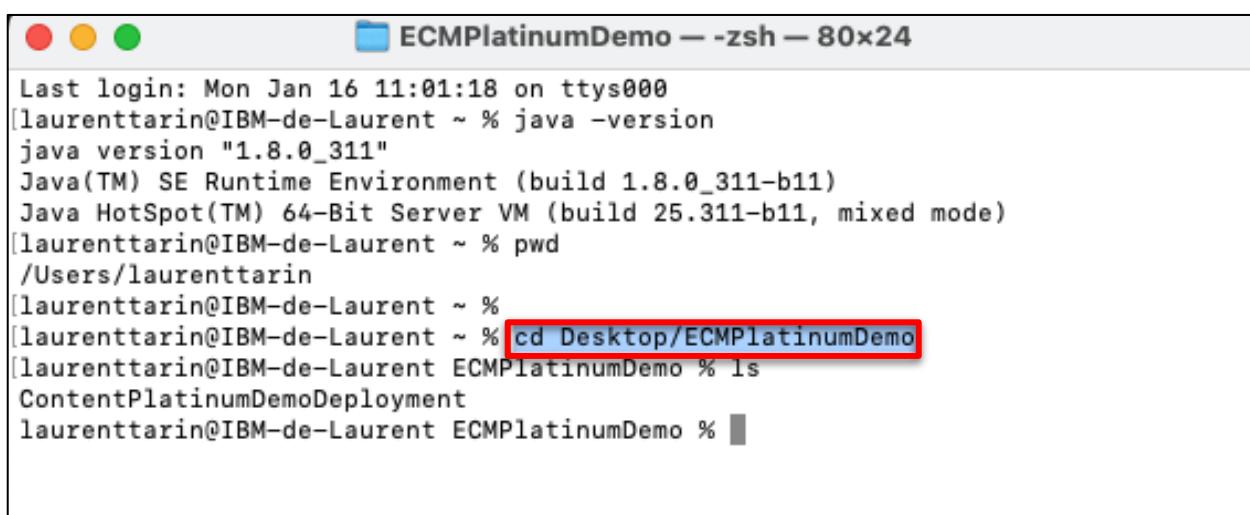
Note: The following instructions are documented for an **Apple Mac OS environment**. For MS Windows users, proceed with the same commands by using a Microsoft shell and executing the .BAT files.

1. **Pre-requisite:** Ensure you have Java8 or later installed on your computer. Type java -version in a shell window (1) and check the version (2).



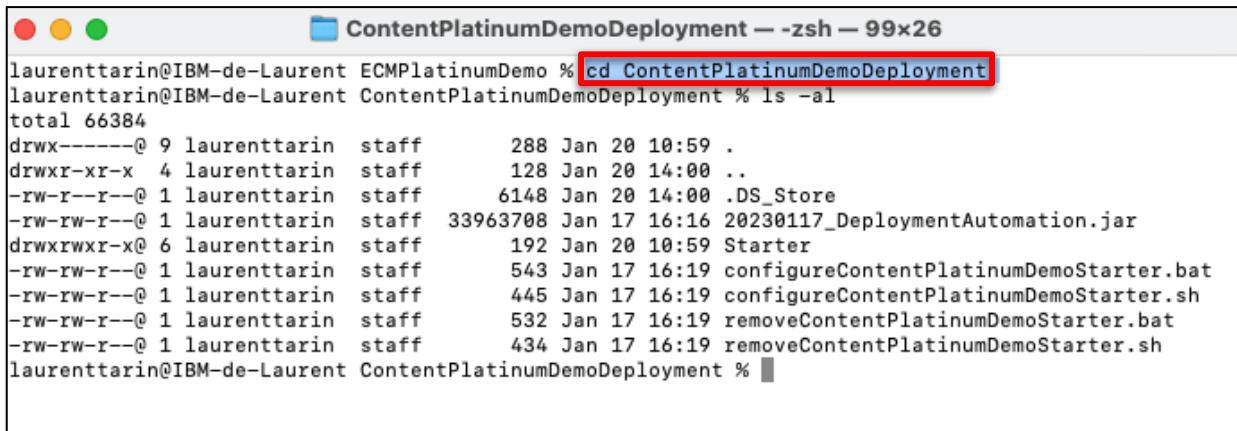
```
laurenttarin -- zsh -- 80x24
Last login: Mon Jan 16 11:01:18 on ttys000
[laurenttarin@IBM-de-Laurent ~ % java -version
java version "1.8.0_311" ← (1)
Java(TM) SE Runtime Environment (build 1.8.0_311-b11)
Java HotSpot(TM) 64-Bit Server VM (build 25.311-b11, mixed mode)
laurenttarin@IBM-de-Laurent ~ % ← (2)
```

2. Unzip the installer archive on your computer.
3. From the shell view, navigate to the folder where the archive was unzipped:



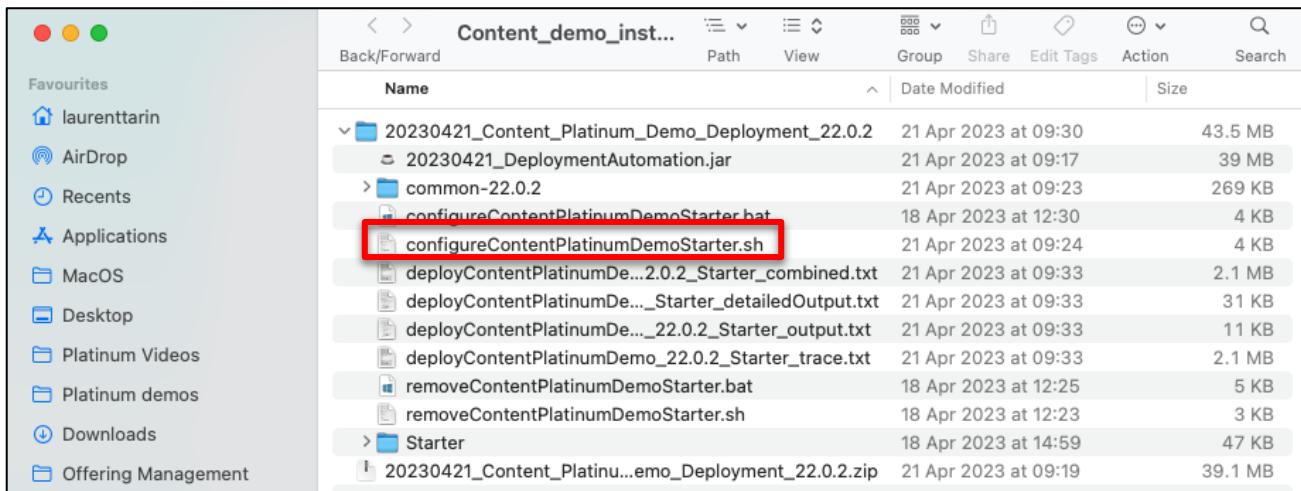
```
ECMPlatinumDemo -- zsh -- 80x24
Last login: Mon Jan 16 11:01:18 on ttys000
[laurenttarin@IBM-de-Laurent ~ % java -version
java version "1.8.0_311"
Java(TM) SE Runtime Environment (build 1.8.0_311-b11)
Java HotSpot(TM) 64-Bit Server VM (build 25.311-b11, mixed mode)
[laurenttarin@IBM-de-Laurent ~ % pwd
/Users/laurenttarin
[laurenttarin@IBM-de-Laurent ~ %
[laurenttarin@IBM-de-Laurent ~ % cd Desktop/ECMPlatinumDemo ← (1)
[laurenttarin@IBM-de-Laurent ECMPlatinumDemo % ls
ContentPlatinumDemoDeployment
laurenttarin@IBM-de-Laurent ECMPlatinumDemo %
```

4. Enter the **ContentPlatinumDemoDeployment** folder.

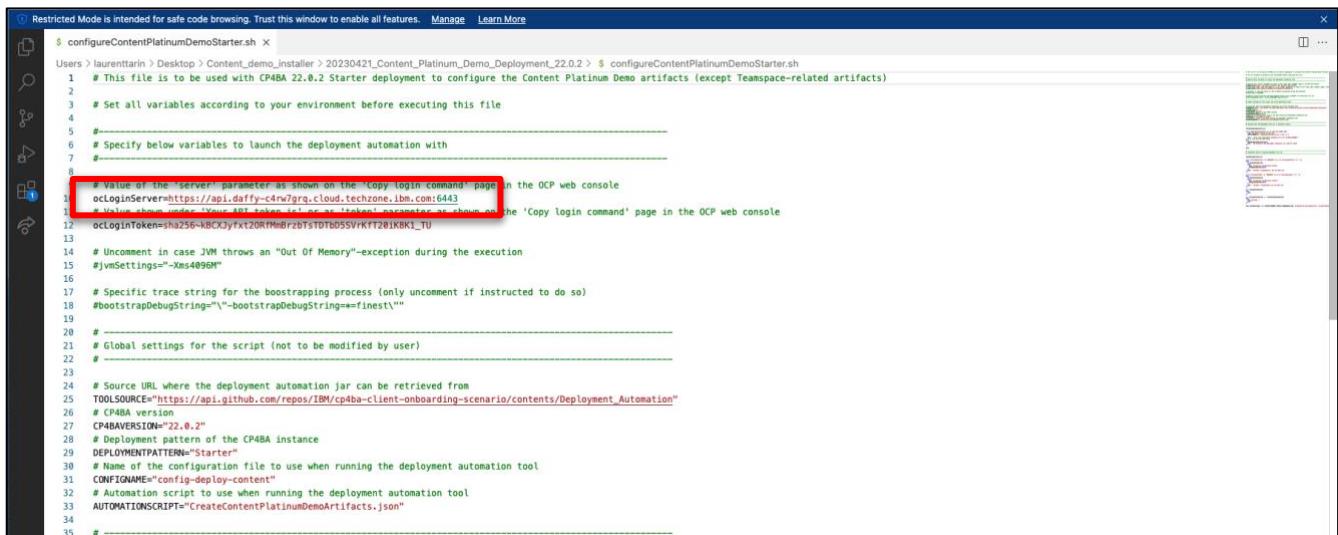


```
ContentPlatinumDemoDeployment -- zsh -- 99x26
laurenttarin@IBM-de-Laurent ECMPlatinumDemo % cd ContentPlatinumDemoDeployment
laurenttarin@IBM-de-Laurent ContentPlatinumDemoDeployment % ls -al
total 66384
drwx-----@ 9 laurenttarin  staff      288 Jan 20 10:59 .
drwxr-xr-x  4 laurenttarin  staff     128 Jan 20 14:00 ..
-rw-r--r--@ 1 laurenttarin  staff    6148 Jan 20 14:00 .DS_Store
-rw-rw-r--@ 1 laurenttarin  staff  33963708 Jan 17 16:16 20230117_DeploymentAutomation.jar
drwxrwxr-x@ 6 laurenttarin  staff    192 Jan 20 10:59 Starter
-rw-rw-r--@ 1 laurenttarin  staff    543 Jan 17 16:19 configureContentPlatinumDemoStarter.bat
-rw-rw-r--@ 1 laurenttarin  staff    445 Jan 17 16:19 configureContentPlatinumDemoStarter.sh
-rw-rw-r--@ 1 laurenttarin  staff    532 Jan 17 16:19 removeContentPlatinumDemoStarter.bat
-rw-rw-r--@ 1 laurenttarin  staff    434 Jan 17 16:19 removeContentPlatinumDemoStarter.sh
laurenttarin@IBM-de-Laurent ContentPlatinumDemoDeployment %
```

5. From your file browser, edit the '**configureContentPlatinumDemoStarter.sh**' file (.sh on Mac and .bat on Windows) using the text editor of your choice.



6. Change the **ocpAdminURL** tag with the AdminURL stored in your cheat sheet (See 2.3).



```
$ configureContentPlatinumDemoStarter.sh
Users > laurenttarin > Desktop > Content_demo_installer > 20230421_Content_Platinum_Demo_Deployment_22.0.2 > $ configureContentPlatinumDemoStarter.sh
1 # This file is to be used with CP4BA 22.0.2 Starter deployment to configure the Content Platinum Demo artifacts (except Teamspace-related artifacts)
2
3 # Set all variables according to your environment before executing this file
4
5 #
6 # Specify below variables to launch the deployment automation with
7 #
8
9 # Value of the "server" parameter as shown on the "Copy login command" page in the OCP web console
10 octLoginServer=https://api.daffy-c4rw7rg.cloud.techzone.ibm.com:6443
11 # Value shown under "Your API token" or as "token" parameter as shown on the "Copy login command" page in the OCP web console
12 octLoginToken=sha256-1BC0CJyfxz20RfH8BzbTsTDibD05SVKfT281K8KL_TU
13
14 # Uncomment in case JVM throw an "Out of Memory"-exception during the execution
15 #jvmSettings=-Xms4096M
16
17 # Specific trace string for the bootstrapping process (only uncomment if instructed to do so)
18 #bootstrapDebugString="--bootstrapDebugEnabled=finest"
19
20 #
21 # Global settings for the script (not to be modified by user)
22 #
23
24 # Source URL where the deployment automation jar can be retrieved from
25 TOOLSOURCE="https://api.github.com/repos/IBM/cp4ba-client-onboarding-scenario/contents/Deployment_Automation"
26 # CP4BA version
27 CP4BAVERSION="22.0.2"
28 # Deployment pattern of the CP4BA instance
29 DEPLOYMENTPATTERN="Starter"
30 # Name of the configuration file to use when running the deployment automation tool
31 CONFIGNAME="config-deploy-content"
32 # Automation script to use when running the deployment automation tool
33 AUTOMATIONSCRIPT="CreateContentPlatinumDemoArtifacts.json"
34
35 # --
```

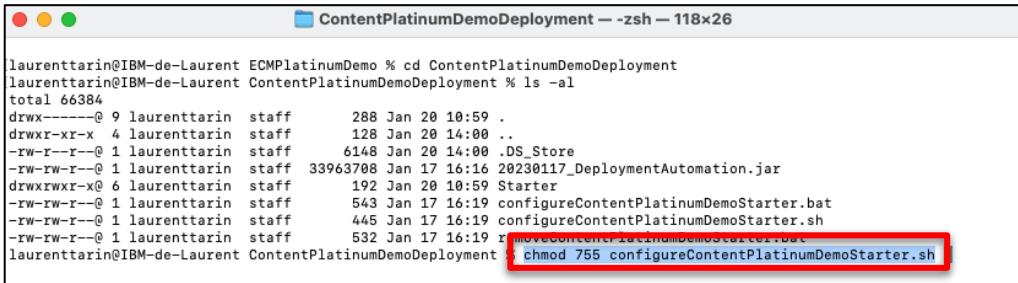
7. Change the **ocpAdminToken** tag with the Admin token stored in your cheat sheet (See 2.3).



```
2 # Set all variables according to your environment before running this file
3 #
4 #
5 #
6 # Identify below variables to launch the deployment automation via
7 # https://IP Address:Port/contentplatinumdemo/deploy?username=Admin User&password=Admin Pwd
8 # A value of the 'activiti' parameter is shown on the 'Logon' command page in the CP4 Web console
9 # An Admin user must be defined in the 'Logon' command page in the CP4 Web console
10 # An Admin password must be defined in the 'Logon' command page in the CP4 Web console
11 # A value of the 'activiti' parameter is shown on the 'Logon' command page in the CP4 Web console
12 # An Admin user must be defined in the 'Logon' command page in the CP4 Web console
13 # An Admin password must be defined in the 'Logon' command page in the CP4 Web console
14 # An Admin user must be defined in the 'Logon' command page in the CP4 Web console
15 # An Admin password must be defined in the 'Logon' command page in the CP4 Web console
16 # An Admin user must be defined in the 'Logon' command page in the CP4 Web console
17 # An Admin password must be defined in the 'Logon' command page in the CP4 Web console
18 # An Admin user must be defined in the 'Logon' command page in the CP4 Web console
19 # An Admin password must be defined in the 'Logon' command page in the CP4 Web console
20 # An Admin user must be defined in the 'Logon' command page in the CP4 Web console
21 # An Admin password must be defined in the 'Logon' command page in the CP4 Web console
22 # An Admin user must be defined in the 'Logon' command page in the CP4 Web console
23 # An Admin password must be defined in the 'Logon' command page in the CP4 Web console
24 # An Admin user must be defined in the 'Logon' command page in the CP4 Web console
25 # An Admin password must be defined in the 'Logon' command page in the CP4 Web console
26 # An Admin user must be defined in the 'Logon' command page in the CP4 Web console
27 # An Admin password must be defined in the 'Logon' command page in the CP4 Web console
28 # An Admin user must be defined in the 'Logon' command page in the CP4 Web console
29 # An Admin password must be defined in the 'Logon' command page in the CP4 Web console
30 # An Admin user must be defined in the 'Logon' command page in the CP4 Web console
31 # An Admin password must be defined in the 'Logon' command page in the CP4 Web console
32 # An Admin user must be defined in the 'Logon' command page in the CP4 Web console
33 # An Admin password must be defined in the 'Logon' command page in the CP4 Web console
34 # An Admin user must be defined in the 'Logon' command page in the CP4 Web console
35 # An Admin password must be defined in the 'Logon' command page in the CP4 Web console
36 # An Admin user must be defined in the 'Logon' command page in the CP4 Web console
37 # An Admin password must be defined in the 'Logon' command page in the CP4 Web console
38 # An Admin user must be defined in the 'Logon' command page in the CP4 Web console
39 # An Admin password must be defined in the 'Logon' command page in the CP4 Web console
```

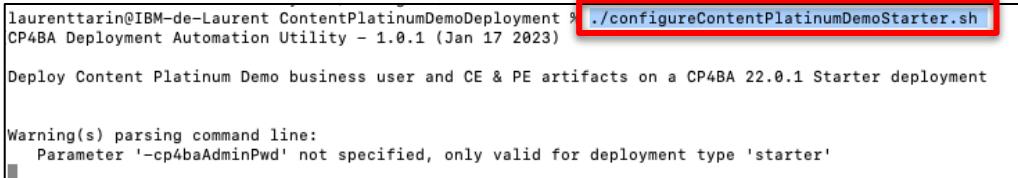
8. Save and close the file (ctrl +s).

9. On MAC: type '**chmod 755 configureContentPlatinumDemoStarter.sh**' to make the file executable.



```
ContentPlatinumDemoDeployment -- zsh -- 118x26
laurenttarin@IBM-de-Laurent ECMPlatinumDemo % cd ContentPlatinumDemoDeployment
laurenttarin@IBM-de-Laurent ContentPlatinumDemoDeployment % ls -al
total 66384
drwx-----@ 9 laurenttarin staff 288 Jan 20 10:59 .
drwxr-xr-x 4 laurenttarin staff 128 Jan 20 14:00 ..
-rw-r--r--@ 1 laurenttarin staff 6148 Jan 20 14:00 .DS_Store
-rw-rw-r--@ 1 laurenttarin staff 339637088 Jan 17 16:16 20230117_DeploymentAutomation.jar
drwxrwxr-x@ 6 laurenttarin staff 192 Jan 20 10:59 Starter
-rw-rw-r--@ 1 laurenttarin staff 543 Jan 17 16:19 configureContentPlatinumDemoStarter.bat
-rw-rw-r--@ 1 laurenttarin staff 445 Jan 17 16:19 configureContentPlatinumDemoStarter.sh
-rw-rw-r--@ 1 laurenttarin staff 532 Jan 17 16:19 r
laurenttarin@IBM-de-Laurent ContentPlatinumDemoDeployment % chmod 755 configureContentPlatinumDemoStarter.sh
```

10. Enter '**./configureContentPlatinumDemoStarter.sh**' to execute the script.



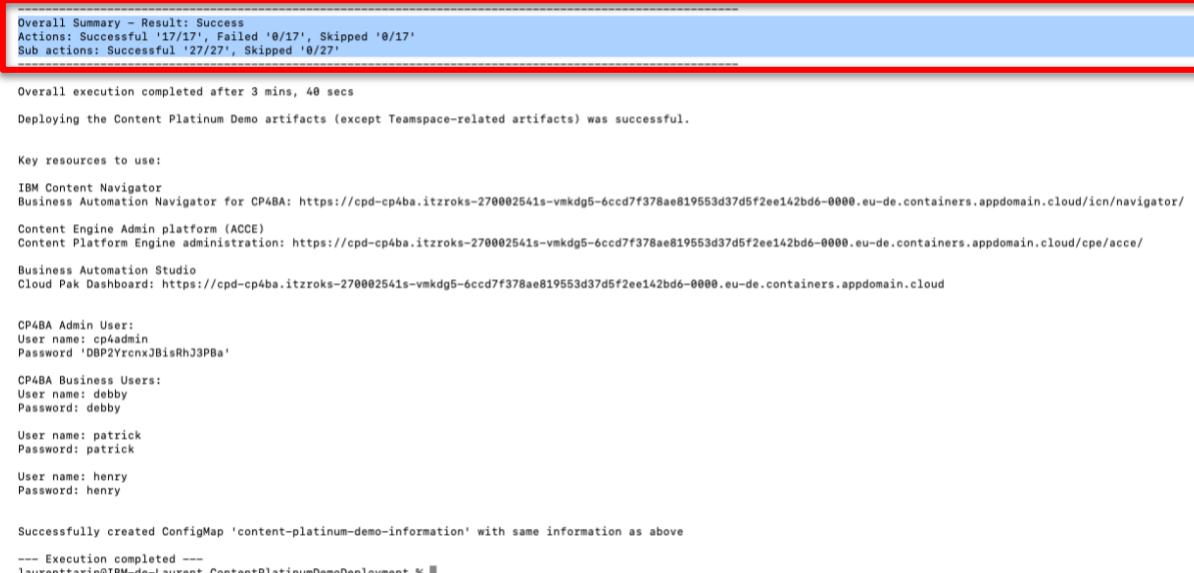
```
laurenttarin@IBM-de-Laurent ContentPlatinumDemoDeployment % ./configureContentPlatinumDemoStarter.sh
CP4BA Deployment Automation Utility - 1.0.1 (Jan 17 2023)

Deploy Content Platinum Demo business user and CE & PE artifacts on a CP4BA 22.0.1 Starter deployment

Warning(s) parsing command line:
  Parameter '-cp4baAdminPwd' not specified, only valid for deployment type 'starter'
```

11. Wait around 1-3 minutes for the execution to complete.

After the execution completes, your display should match:



```
Overall Summary - Result: Success
Actions: Successful '17/17', Failed '0/17', Skipped '0/17'
Sub actions: Successful '27/27', Skipped '0/27'

Overall execution completed after 3 mins, 40 secs
Deploying the Content Platinum Demo artifacts (except Teamspace-related artifacts) was successful.

Key resources to use:
IBM Content Navigator
Business Automation Navigator for CP4BA: https://cpd-cp4ba.itzroks-270002541s-vmkdg5-6ccd7f378ae819553d37d5f2ee142bd6-0000.eu-de.containers.appdomain.cloud/icn/navigator/
Content Engine Admin platform (ACCE)
Content Platform Engine administration: https://cpd-cp4ba.itzroks-270002541s-vmkdg5-6ccd7f378ae819553d37d5f2ee142bd6-0000.eu-de.containers.appdomain.cloud/cpe/acce/
Business Automation Studio
Cloud Pak Dashboard: https://cpd-cp4ba.itzroks-270002541s-vmkdg5-6ccd7f378ae819553d37d5f2ee142bd6-0000.eu-de.containers.appdomain.cloud

CP4BA Admin User:
User name: cp4admin
Password: DBP2YrcnxJBisRhJ3PBa'

CP4BA Business Users:
User name: debby
Password: debby

User name: patrick
Password: patrick

User name: henry
Password: henry

Successfully created ConfigMap 'content-platinum-demo-information' with same information as above
--- Execution completed ---
laurenttarin@IBM-de-Laurent ContentPlatinumDemoDeployment %
```

Note: Review the entire display to check that all actions are Successful – No Failed or Skipped.

The different user logins and passwords are also displayed at the end of the script execution.

5 - Prepare your document files

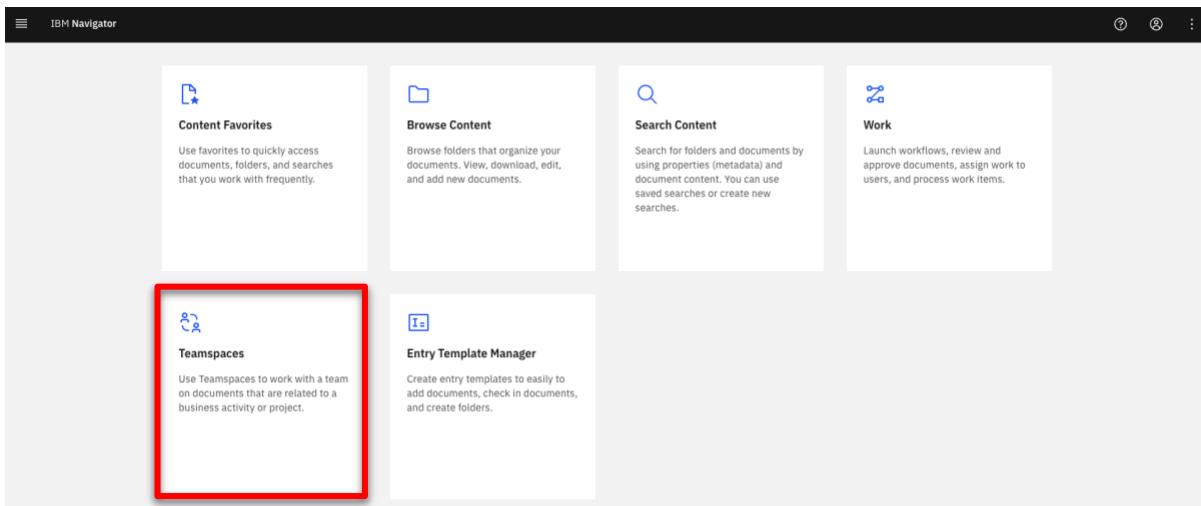
During the demo, documents related to the applicant John Doe will be added to the content management platform. These documents, called **Candidate files**, are documents sent by the applicant or pre-filled forms that reduce the demonstration duration.

1. Download the [Resource files.zip](#) archive containing the documents.
2. Unzip the archive.
3. Open the folder containing the John Doe document repository.

6 - Create the Teamspace template

Let's create a Teamspace template for the hiring team to use when collaborating on new applicants. Download the [P8TeamspaceTemplates.templates](#) file.

1. Open IBM Content Navigator using the URL from your cheat sheet. Log in using the 'cp4admin' username and password from your cheat sheet.
2. Click the **Teamspace** tile.



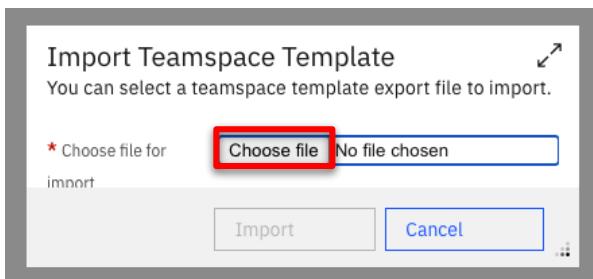
3. Click the **Templates** tab.



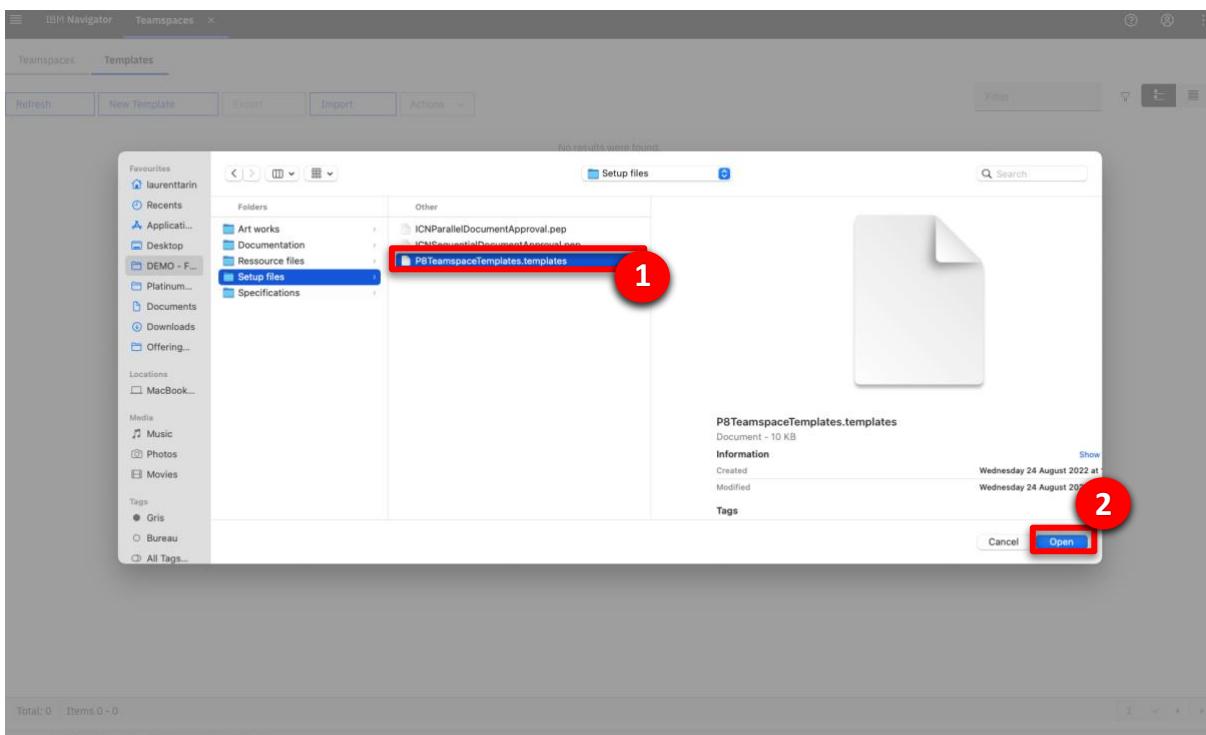
4. Click **Import**.



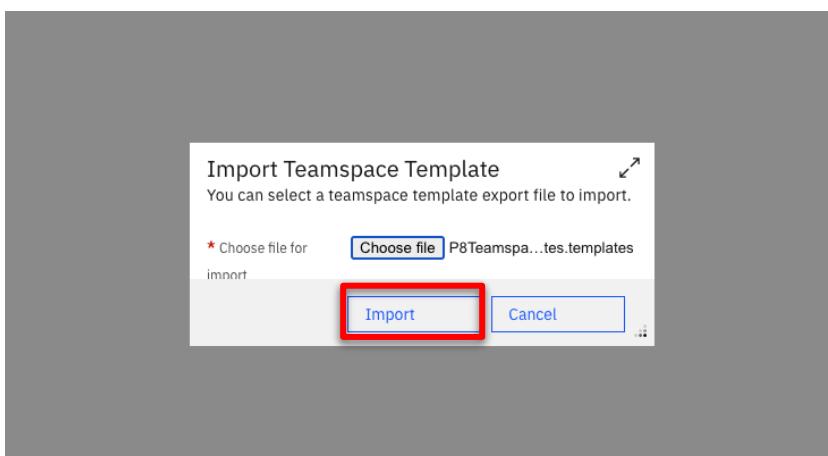
5. Click **Choose file**.



6. Select the **P8TeamsapceTemplates.templates** file (1) and click **Open** (2).



7. Click **Import**.



8. Double-click **FC Hiring Teamspace Template**.

The screenshot shows the 'Teams' tab selected in the navigation bar. Below it, there are buttons for Refresh, New Template, Export, Import, and Actions. A search bar labeled 'Filter' is on the right. Two templates are listed: 'DEMO_TEAMSPACE_TEMPLATE' and 'FC Hiring Teamspace Template'. The 'FC Hiring Teamspace Template' is highlighted with a red box.

9. Click the **Select Classes or Entry Templates** tab.

The screenshot shows the 'Teamspaces' tab selected in the navigation bar. Below it, there are buttons for Previous, Next, Validate, and Cancel. The 'Define Teamspace Template' section is visible. The 'Select Classes or Entry Templates' tab is highlighted with a red box. It contains fields for 'Template name' (set to 'FC Hiring Teamspace Template') and 'Template description'.

10. Select **HR Application Document Entry Template** (1) and click **Add** (2).

The screenshot shows the 'Teamspaces' tab selected in the navigation bar. Below it, there are buttons for Previous, Next, Validate, and Cancel. The 'Select Classes or Entry Templates' tab is highlighted with a red box. A message box says: 'The following entry templates are not available in this repository and were removed from the list of selected entry templates:'. Below this, there are radio buttons for 'Use classes to add documents' and 'Use entry templates to add documents'. Under 'Selected Entry Templates', there is a table with one row. The 'Available Entry Templates' table below it has one row, which is highlighted with a red box and circled with a red number '1'. A red box highlights the 'Add' button at the bottom of the 'Available Entry Templates' table, circled with a red number '2'.

Name	Description	Class Name	Template Type	Workflow Name	File Types
HR Application Document Entry Template		Application Document	document		

11. Click the Folders and Documents Tree tab.

The screenshot shows the 'TeamSpace Template Builder' interface. The 'Teams' tab is selected in the top navigation bar. Below it, the 'Define Teamspace Template' section is visible. On the left, a sidebar lists several tabs: 'Select Classes or Entry Templates', 'Folders and Documents Tree' (which is highlighted with a red box), 'Select Roles', and 'Select Searches'. The main content area is titled 'Select Classes or Entry Templates' and contains a note about entry templates being removed from the repository. At the bottom of this section, there are two radio buttons: 'Use classes to add documents' and 'Use entry templates to add documents'. A yellow warning box at the bottom states: 'The following entry templates are not available in this repository and were removed from the list of selected entry templates.'

12. Click HR Documents.

This screenshot continues the 'TeamSpace Template Builder' process. The 'Folders and Documents Tree' tab is now selected. In the main content area, there is a note about documents and folders being removed from the repository. Below this, a tree view shows a folder named 'FC Hiring TeamSpace Ti' which contains a subfolder 'Candidates files' and a file 'HR Documents'. The 'HR Documents' file is highlighted with a red box. A message below the tree states: 'The folder is empty.'

13. Click Add Document.

The 'TeamSpace Template Builder' interface is shown again, with the 'Folders and Documents Tree' tab selected. The main content area includes a note about documents and folders being removed. Below this, there is a toolbar with buttons for 'New Folder', 'Add Document' (which is highlighted with a red box), 'Properties', and 'Remove'. The 'Add Document' button has a dropdown arrow next to it.

14. Click the drop-down menu (1) and select ECM Platinum Demo (2). Click OK (3).

This screenshot shows a 'Select Item' dialog box. It features a search interface with fields for 'Search Criteria' (including 'How do you want to find items to attach?' with 'New search' checked), 'Search in' (set to '\content (Including subfolders)'), 'Class' (set to 'Repository'), and 'Text options' (set to 'Any'). The search results show a tree structure under 'content': 'Entire Repository' (expanded) containing 'CodeModuleEmitter', 'ECM Platinum Demo' (highlighted with a red box), 'Focus Corp', and 'Workflows'. A red circle labeled '1' is over the dropdown arrow next to 'Entire Repository'. A red circle labeled '2' is over the 'ECM Platinum Demo' item. A red circle labeled '3' is over the 'OK' button at the bottom right of the dialog.

15. Scroll to the **Search Criteria** section. In the **Property options** box, select **Is not Empty** (1) in the search criteria drop down menu (1) next to **Document Title**. Click **Search** (2).

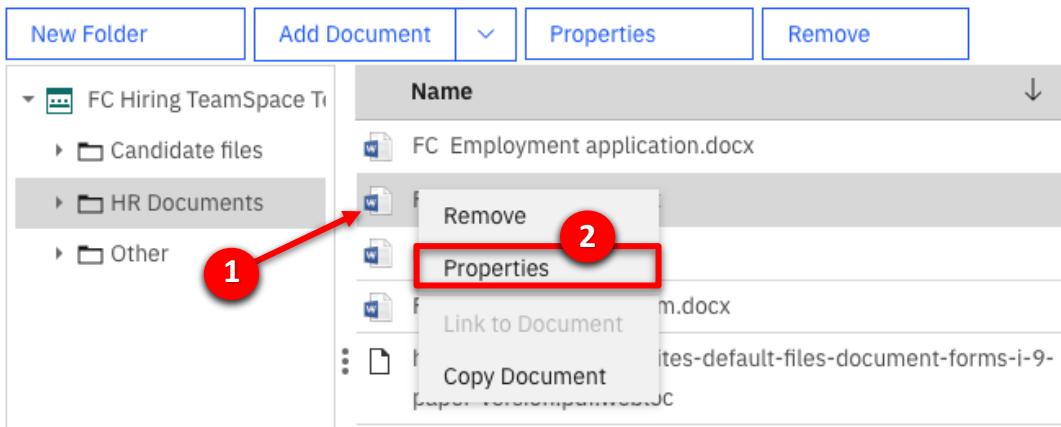
The screenshot shows the 'Search Criteria' interface. On the left, there's a 'Property options' dropdown menu with 'Match all' selected. Under 'Document Title', the 'Starts With' option is chosen. A red circle labeled '1' highlights the 'Is Not Empty' option in the dropdown. A red circle labeled '2' highlights the 'Search' button. To the right, a 'Select Item' dialog box is open, containing 'OK' and 'Cancel' buttons.

16. Select all the files (1) and click **OK** (2).

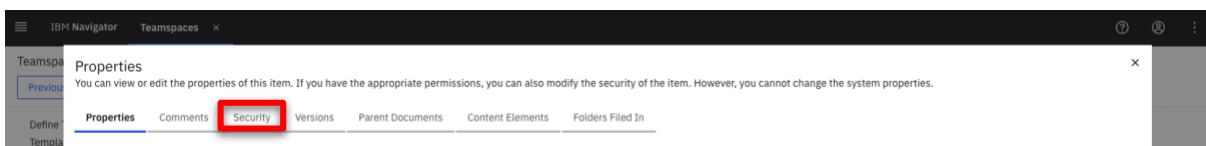
The screenshot shows the 'Search Results' interface. A list of files is displayed in a table with columns: Name, Size, Modified On, and Major... (partially visible). A red circle labeled '1' highlights the checkbox for the first file, 'FC Employment application.docx'. Below the table, a 'Select Item' dialog box is open, with the 'OK' button highlighted by a red circle labeled '2'.

Name	Size	Modified On	Maj...
FC Employment application.docx	86 KB	11/23/2022, 10:49 AM	1
FC Evaluation form.docx	48 KB	11/23/2022, 10:49 AM	1
FC Job offer.docx	22 KB	11/23/2022, 10:49 AM	1
FC Salary discussion form.docx	54 KB	11/23/2022, 10:49 AM	1
https://www.uscis.gov/sites/default/files/document-forms/i-9/paper-version.pdf	1 KB	11/23/2022, 10:49 AM	1

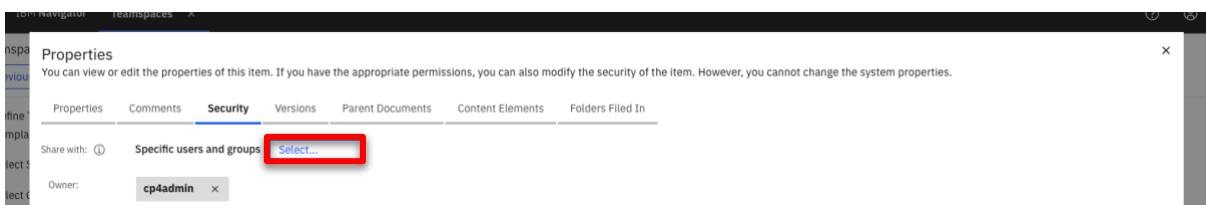
17. Right-click **FC Evaluation form.docx** (1) and click **Properties** (2).



18. Click the **Security** tab.



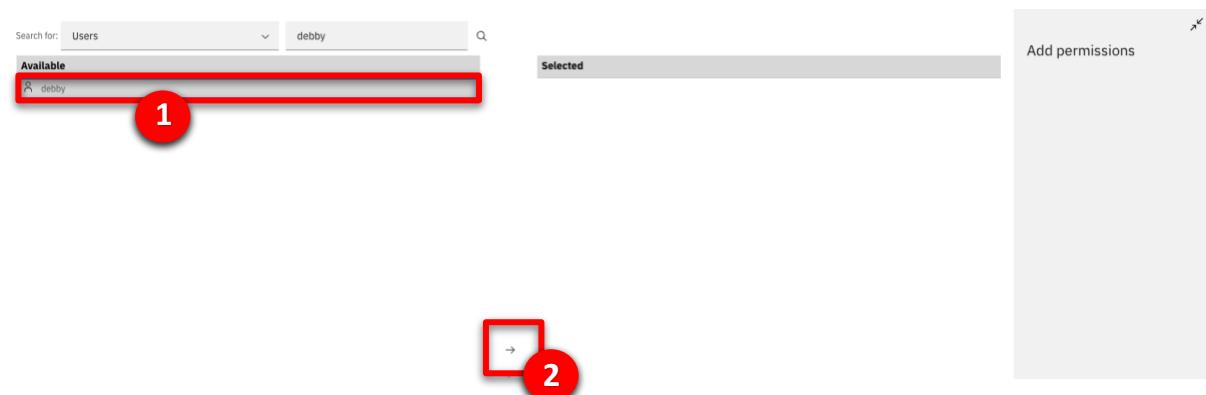
19. Click **Select...**.



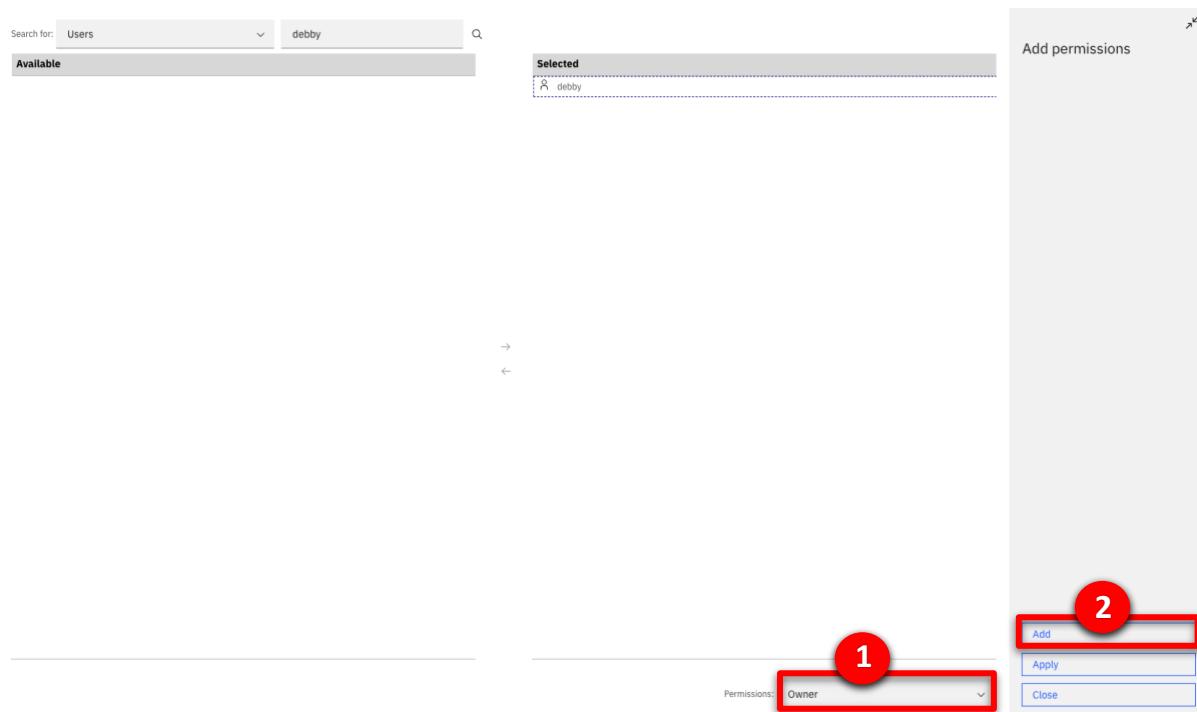
20. Search for '**debby**'.



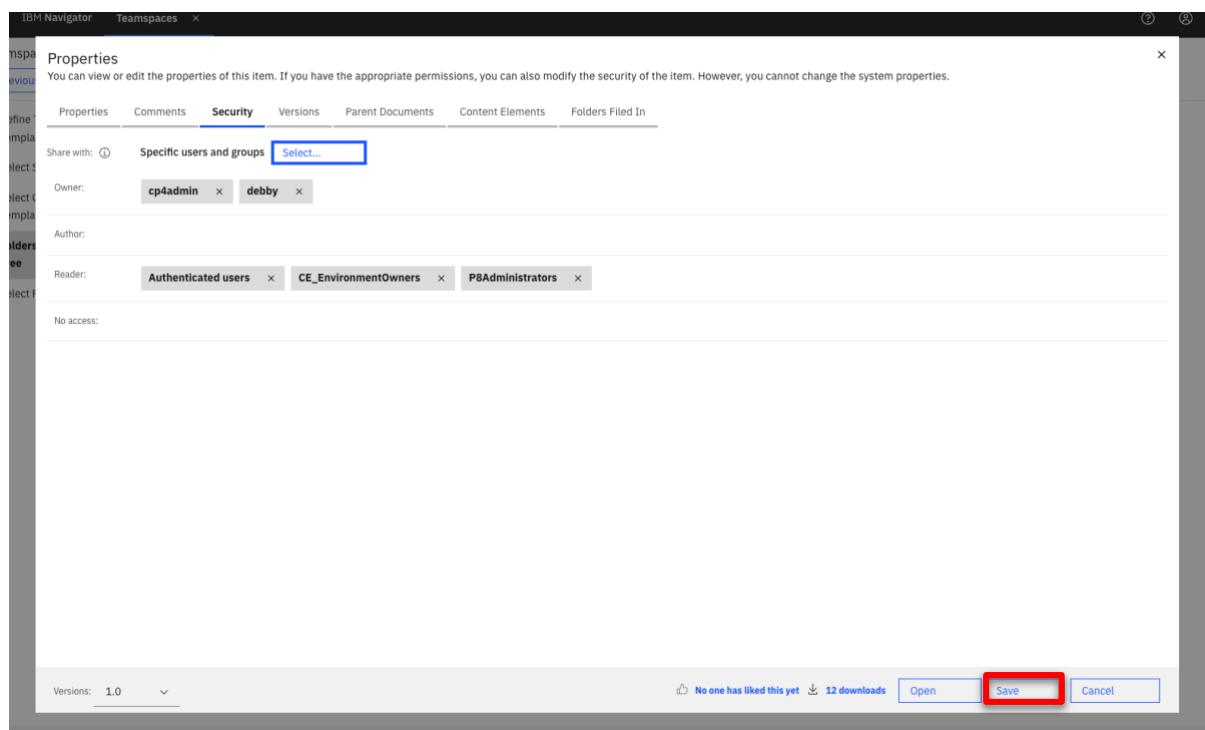
21. Select **debby** (1) and click the **right-facing arrow** (2) to add her to the **Selected** list.



22. Verify that the **Permissions** role is **Owner** (1) and then click **Add** (2).



23. Click **Save**.



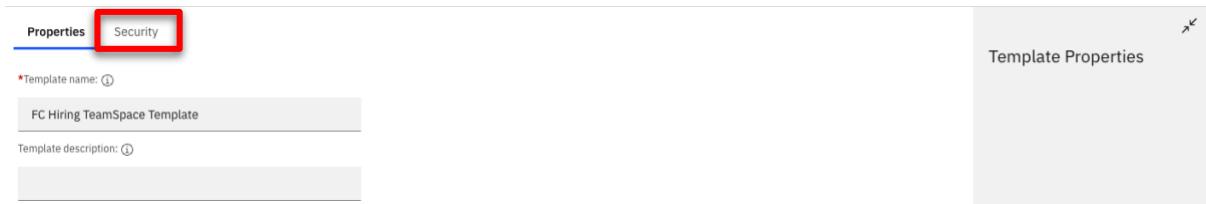
24. Click **Validate**.



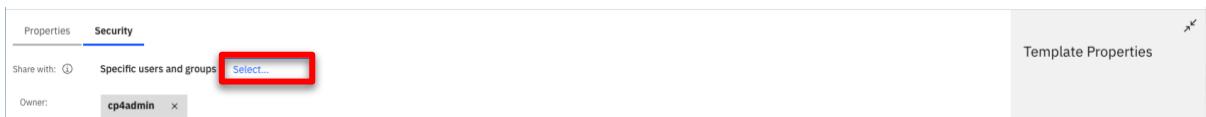
25. Select **FC Hiring Teamspace Template** (1), click the **Actions** (2) drop-down menu, and click **Properties** (3).



26. Click **Security**.



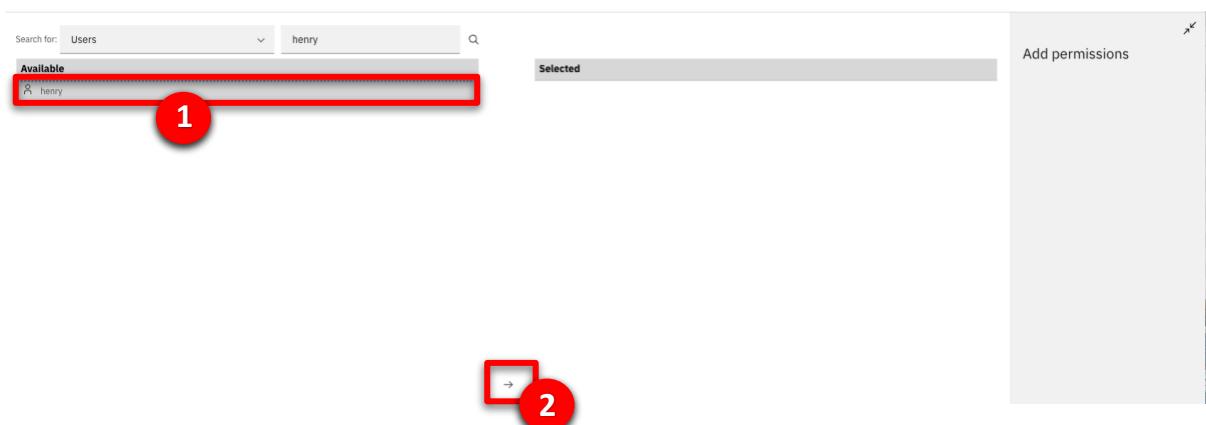
27. Click **Select**.



28. Type 'henry' (1) and click the magnifier icon (2).



29. Select **henry** (1) and click the **right-facing arrow** (2) to add him to the **Selected** list.



30. Repeat the previous step to add **debby** and **patrick**.

31. Select **Reader** in the **Permissions** drop box (1) and click **Add** (2).

Search for: Users patrick

Available

Selected

henry
debby
patrick

→
←

Owner
Author
Reader 1
No access
Permissions: Owner

Add 2
Apply
Close

32. Click **Save**.

Properties Security

Share with: Select...

Owner: cp4admin

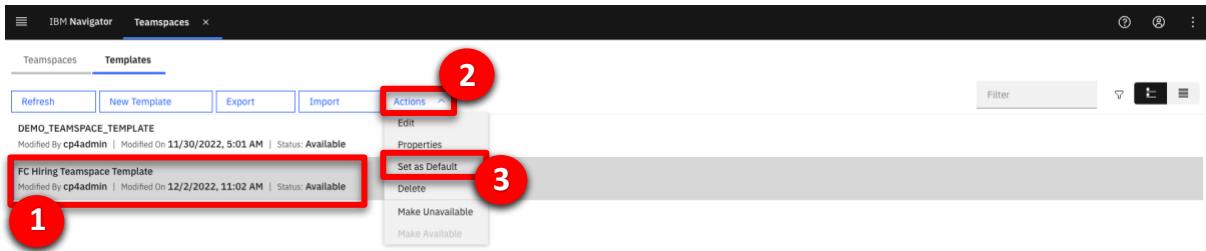
Author:

Reader: CE_EnvironmentOwners P8Administrators henry patrick debby

No access:

Save Cancel

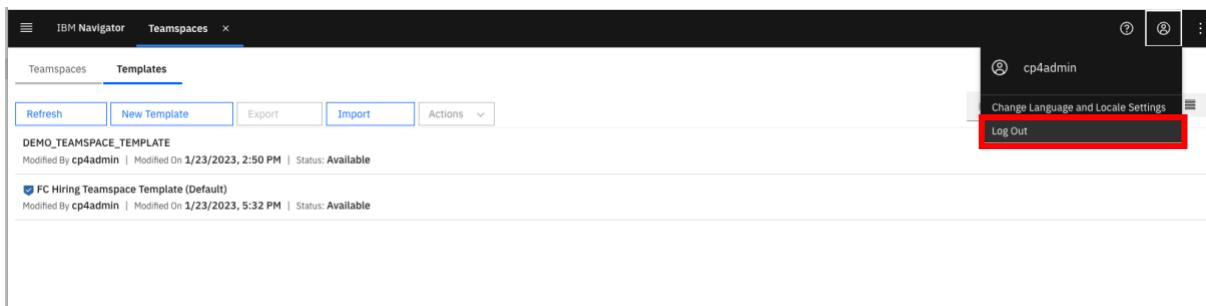
33. Select **FC Hiring Teamspace Template** (1), click **Actions** (2), and click **Set as Default** (3).



34. Click the x to close the Teamspace view.

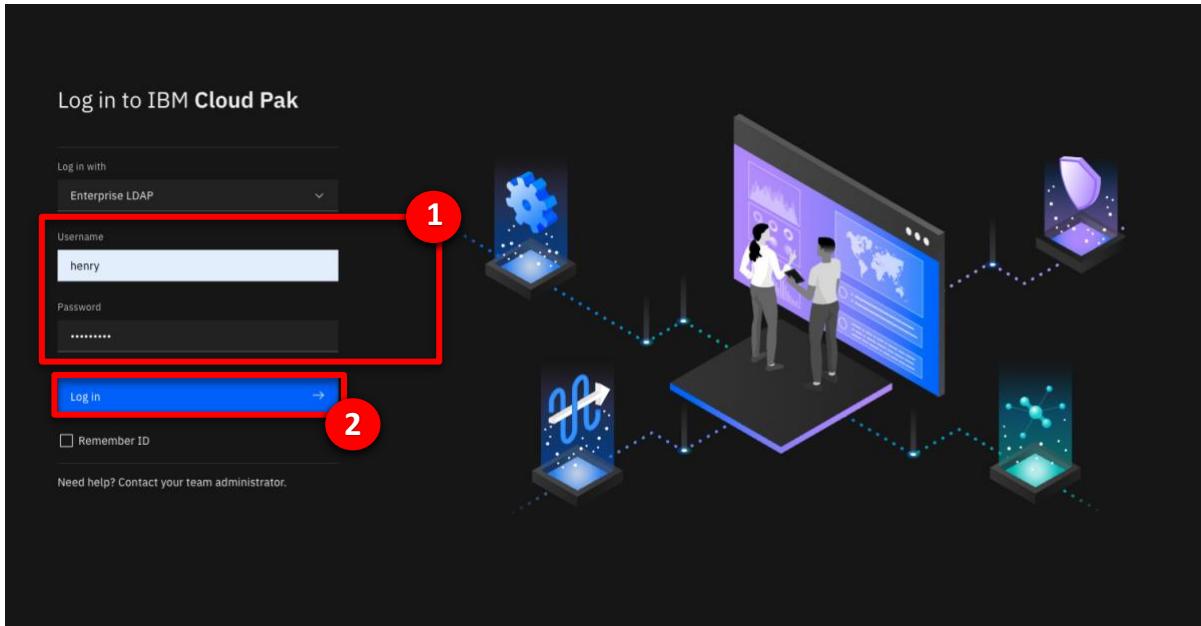


35. Log out From Navigator.



7 - Create a finalized teamspace

1. Open IBM Content Navigator using the URL from your cheat sheet. Enter the **Username ‘henry’** and the **Password ‘henry’** (1). Click **Log in** (2).



2. Click the **Teamspace** tile.

IBM Navigator

Content Favorites

Browse Content

Search Content

Work

Teamspace

Entry Template Manager

3. Click **New Teamspace**.

Teamspace

New Teamspace

Refresh

Open

Actions

DEMO_TEAMSSPACE

Modified By cp4admin | Modified On 12/8/2022, 4:07 AM | Status: Available

4. Type ‘John Doe’ (1) in the **Teamspace name** field and click **Select Users** (2).

IB Navigator Teamspaces

Teamspace Builder

Previous Next Finish Cancel

Define Teamspace

Teamspace name: (1)

Teamspace description:

Teamspace template: FC Hiring Teamspace Template

Select Searches
Select Classes or Entry Templates
Folders and Documents Tree
Select Users (2)

5. Click **Add Users and Groups . . .**.

IB Navigator Teamspaces

Teamspace Builder

Previous Next Finish Cancel

Define Teamspace Select Users

Select Searches
Select Classes or Entry Templates
Folders and Documents Tree
Select Users (2)

In a teamspace, each user is assigned to one or more roles that specify the tasks that the user can complete.

Add users to the teamspace and assign roles to the users. [Learn more](#)

Selected users and groups:
Remove Add Users and groups... (1)

User and Group	Roles
R henry	Owner

Available roles:

Role
<input checked="" type="checkbox"/> Owner
<input type="checkbox"/> Member
<input type="checkbox"/> Reviewer

6. Type ‘debby’ (1) and click the **magnifier icon** (2).

Search for: Users debby (1)

Available Selected

Add Users and Groups

7. Select **debby** (1) and click the **right-facing arrow** (2).

Search for: Users debby (1)

Available Selected

Add Users and Groups

8. Repeat the previous step to add **patrick**.

Search for: Users patrick

Available Selected

Add Users and Groups

9. Select **Member** (1) in the **Roles** menu and click **Add** (2).

The screenshot shows the 'Add Users and Groups' dialog box. On the left, there's a search bar with 'Users' and a dropdown set to 'patrick'. Below it is a 'Available' list containing 'patrick'. To the right is a 'Selected' list containing 'patrick'. At the bottom, a dropdown menu shows 'Owner', 'Member' (which is highlighted with a red box), and 'Reviewer'. A red circle labeled '1' is over the 'Member' option. To the right of the dropdown is a 'Roles:' field set to 'Owner'. On the far right are 'Add', 'Apply', and 'Close' buttons, with a red circle labeled '2' over the 'Add' button.

10. Click **Finish**.

The screenshot shows the 'Teamspaces Builder' interface. At the top, there are 'IBM Navigator' and 'Teamspaces' tabs. Below them is a 'Teamspaces Builder' section with 'Previous' and 'Next' buttons, and a 'Finish' button which is highlighted with a red box. There are also 'Cancel' and other standard buttons.

11. Click the **Candidate files** folder.

The screenshot shows the 'John Doe' Teamspace interface. At the top, there are 'IBM Navigator' and 'Teamspaces' tabs, with 'Teamspaces' selected. Below is a 'Teamspaces' sidebar with 'John Doe' selected. The main area shows a file list with a 'Candidates files' folder highlighted with a red box. Other items include 'HR Documents' and 'Other'. The file list columns are Name, Modified By, Modified On, Comments, Downloads, Likes, and Tags.

12. Open your local files containing John Doe's application files.

The screenshot shows a Mac OS X Finder window titled 'John Doe'. The sidebar on the left lists 'Favourites' with items like 'laurenttarin', 'AirDrop', 'Recents', 'Applications', 'Desktop', and 'DEMO - FileNet EC...'. The main pane displays a list of files from the 'John Doe' Teamspace. The list is highlighted with a large red box. The columns are Name, Date Modified, Size, and Kind. The files listed are: 'John Doe Diploma.pdf', 'John Doe Drivers license.pdf', 'John Doe Evaluation form.pdf', 'John Doe Resume.pdf', 'John Doe Salary discussion form.docx', 'John Doe Salary discussion form.pdf', and 'John Doe Video.mp4'. The last file, 'John Doe Video.mp4', has a larger red box around it.

13. Drag the **John Doe Diploma.pdf** file to the **Candidate files** folder.

The screenshot shows the IBM Navigator interface. At the top, there are tabs for 'IBM Navigator', 'Teamspaces', and 'John Doe'. Below this is a toolbar with 'Refresh', 'Add Document', 'Add from Repository', 'New Folder', and 'Actions'. The main area is titled 'John Doe / Candidates files' and shows a message: 'The folder is empty.' On the left, there's a 'Browse' sidebar with 'John Doe' expanded, showing 'Candidates files', 'HR Documents', and 'Other'. Below it is a 'Search' sidebar with 'Recent Searches' and 'All Searches'. In the center, a file viewer window titled 'John Doe' displays a list of files:

Name	Date Modified	Size	Type
John Doe Diploma.pdf	17 Nov 2022 at 17:06	2.3 MB	PDF Document
John Doe Drivers license.pdf	15 Nov 2022 at 09:24	1.5 MB	PDF Document
John Doe Evaluation form.pdf	Yesterday at 17:46	736 KB	PDF Document
John Doe Resume.pdf	Yesterday at 16:45	147 KB	PDF Document
John Doe Resume discussion form.docx	Yesterday at 17:21	61 KB	Micros... (.docx)
John Doe Salary discussion form.pdf	Yesterday at 17:20	194 KB	PDF Document
John Doe Video.mp4	16 Nov 2022 at 11:23	41.7 MB	MPEG-4 movie

At the bottom, there are buttons for 'Team' (dropdown), 'Total: 0', 'Items 0 - 0', and navigation arrows. A status bar at the bottom says '11/23/2022, 2:41 PM - The configuration was added.'

14. Type '**John Doe**' for **Candidate Name** (1), set the Document Type to **Diploma** (2), set the Document Source to **External** (3), and set the **Department Name** to **R&D** (4). Click the **calendar** icon (5) and pick a day approximately three days in the future. Click **Add** (6).

The screenshot shows the 'Add Document' dialog box. On the left, there's a 'Browse' sidebar with 'John Doe' expanded, showing 'Candidates files', 'HR Documents', and 'Other'. Below it is a 'Search' sidebar with 'Recent Searches' and 'All Searches'. The main area has tabs for 'General', 'Candidate files', and 'Properties'. Under 'General', there's a 'Save in:' dropdown (set to 'Candidate files'), a 'File name:' input field ('John Doe Diploma.pdf'), and a 'Major version' checkbox. Under 'Properties', there are fields for 'Candidate Name' (1, 'John Doe'), 'Document Title' (2, 'John Doe Diploma.pdf'), 'Document Type' (2, 'Diploma'), 'Document Source' (3, 'External'), 'Department Name' (4, 'R&D'), 'Application Date' (5, a date picker showing '12/8/2022' and '12:00 AM'), and a large blue 'Add' button (6). At the bottom, there are 'Cancel' and 'Add' buttons, with the 'Add' button highlighted by a red box.

15. Repeat the previous two steps to add the other documents (individually) to the **Candidate Files** folder. Add the properties below to each document as you add them to the repository:

Document Title	Candidate Name	Document Type	Document Source	Department Name	Application Date
John Doe Resume.pdf	John Doe	Resume	External	R&D	<Current date>
John Doe Diploma.pdf		Diploma			
John Doe Video		Candidate video			
John Doe Drivers licence.pdf		ID			

16. Click **John Doe Video.mp4**.

The screenshot shows the IBM Navigator interface with the 'Teamspaces' tab selected. A sidebar on the left shows a tree structure with 'John Doe' expanded, revealing 'Candidate files', 'HR Documents', and 'Other'. The main area displays a list of files under 'Candidate files': 'John Doe Diploma.pdf', 'John Doe Drivers license.pdf', 'John Doe Resume.pdf', and 'John Doe Video.mp4'. The 'John Doe Video.mp4' file is highlighted with a red box.

17. Click **Bookmarks**.

The screenshot shows the file details page for 'John Doe Video.mp4'. The top navigation bar includes 'Previous' and 'Next' buttons, a search bar, and various layout and merge/split options. Below the navigation is a breadcrumb trail: 'John Doe Video.mp4'. The main content area has a dark header labeled 'Bookmarks'. A dropdown menu is open, showing 'New Bookmark' (which is also highlighted with a red box).

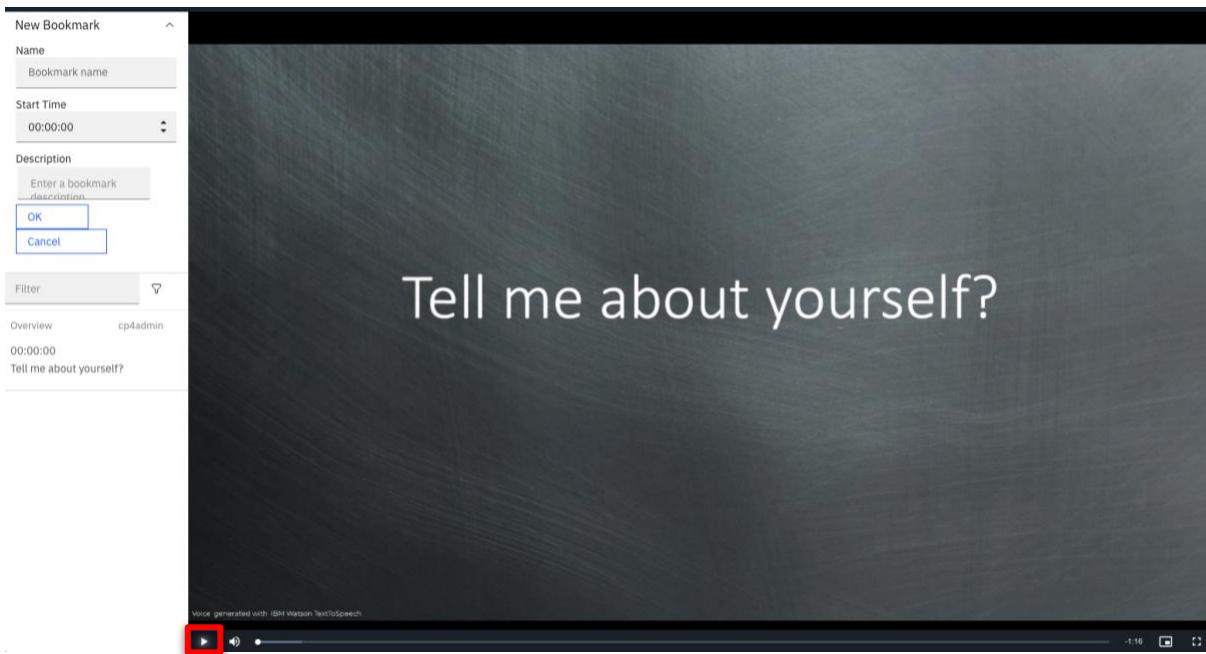
18. Click **New Bookmark**.

The screenshot shows the 'New Bookmark' dialog box. It has a 'Name' field containing 'Overview' (circled with red number 1), a 'Description' field containing 'Tell me about yourself?' (circled with red number 2), and a 'OK' button at the bottom (circled with red number 3). The background of the dialog is white, while the rest of the screen is dark.

19. Type '**Overview**' (1) in the **Name** field. Type '**Tell me about yourself?**' (2) in the **Description** field. Then click **OK** (3).

The screenshot shows a video player window displaying the text 'Tell me about yourself?'. In the top-left corner of the video frame, there is a small circular icon with a play button symbol. To the left of the video frame, a sidebar shows the 'Bookmarks' section with a 'New Bookmark' dialog open. The 'Name' field contains 'Overview' (circled with red number 1), the 'Description' field contains 'Tell me about yourself?' (circled with red number 2), and the 'OK' button is highlighted with a red box (circled with red number 3).

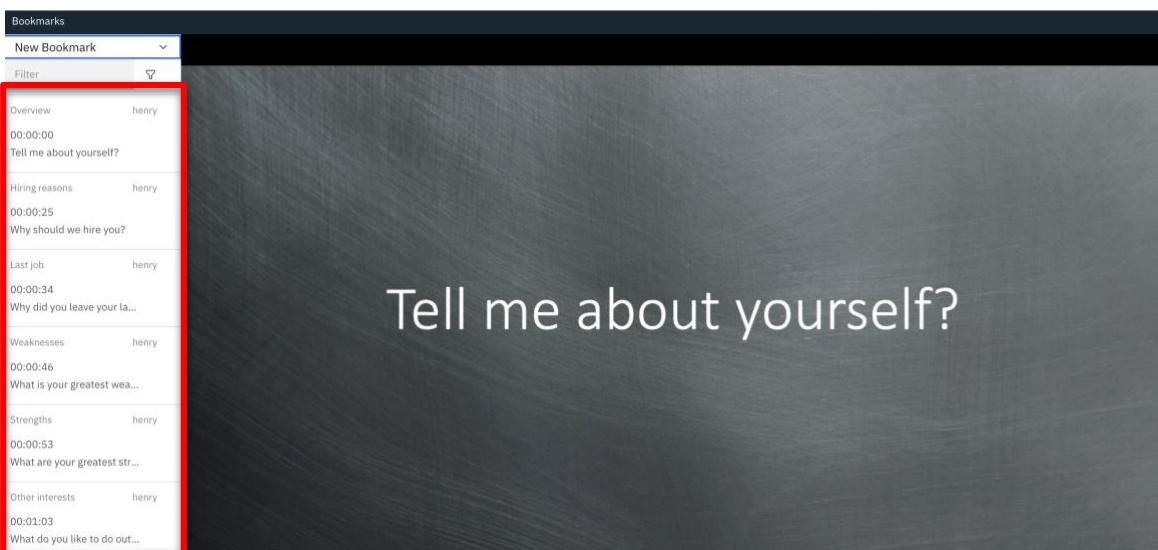
20. Click the **play** icon and wait until the question slide that indicates the next question. Click the **pause** icon (which is in the same place as the play icon).



21. **Repeat steps 17-19** to add more bookmarks, one at each new question slide. Repeat this process until these bookmarks are added:

Bookmark name	Time	Description
Overview	00:00:00	Tell me about yourself?
Hiring reasons	00:00:25	Why should we hire you?
Last job	00:00:34	Why did you leave your last job?
Weaknesses	00:00:46	What is your greatest weakness?
Strengths	00:00:53	What are your greatest strengths?
Other interests	00:01:03	What do you like to do outside of work?

22. The finalized bookmarks for the video should match the following:



23. Close the IBM Navigator Viewer window.

PREPARE TO GIVE THIS DEMO

1 - Before each demo

Open these resources before starting the demonstration:

1. Open the cheat sheet you created during demo preparation.
2. Open the folder containing John Doe's candidate files (unzipped during step **4 - Prepare your document files**).
3. Use the URL from your cheat sheet to open IBM Content Navigator in a browser tab.

Note: Do not log in now, you will do this during the demonstration.

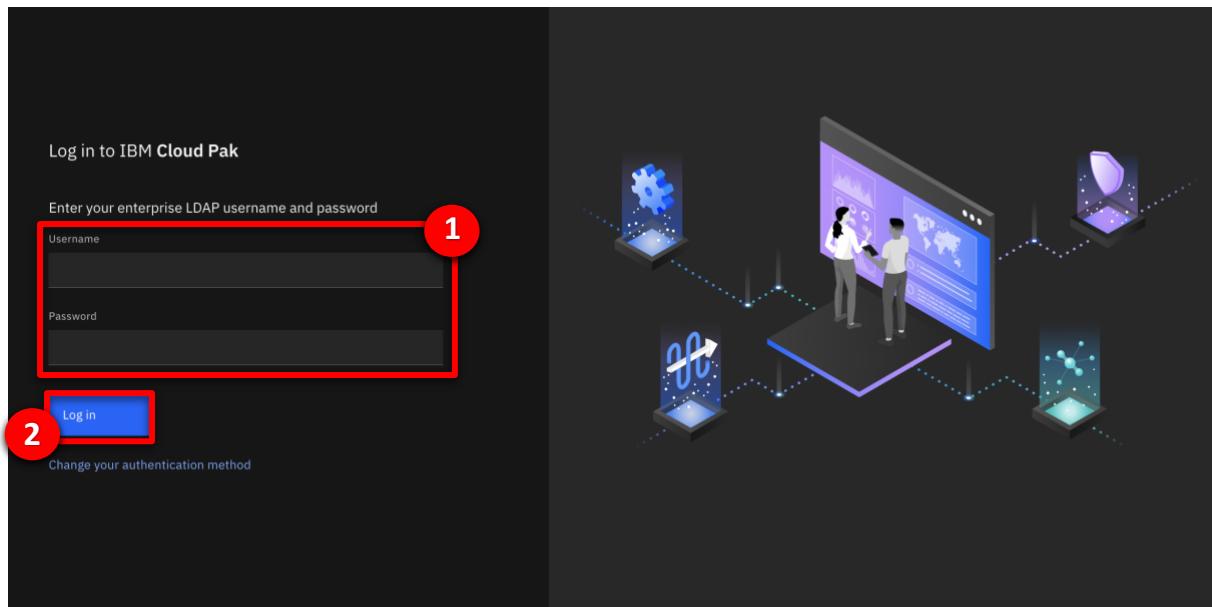
2 - Giving the demo again

To give this demo again, you must do the following steps to reset the demo to its original state:

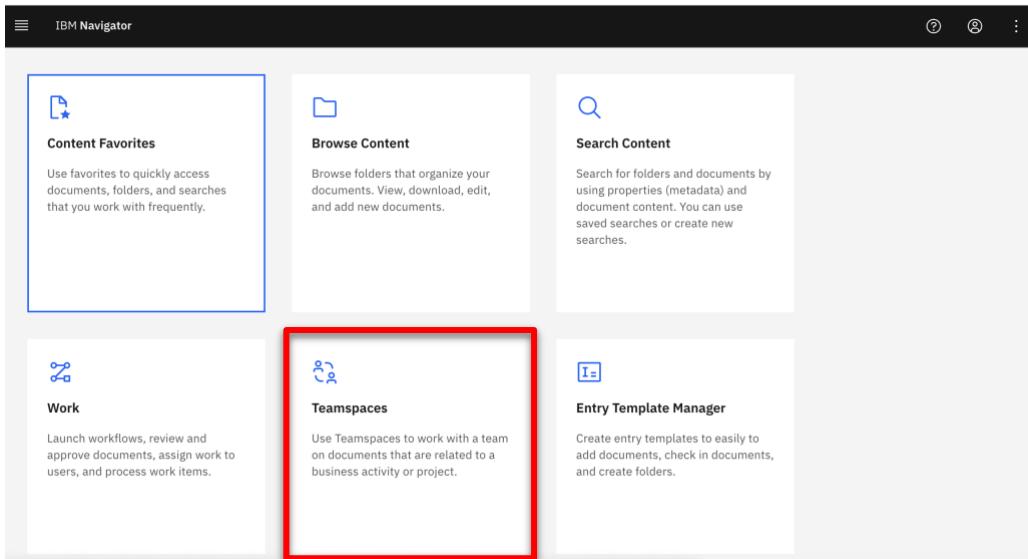
1. Delete the John Doe Teamspace.
2. Delete the John Doe Demo Teamspace.
3. Repeat Step 12 of this document.

Follow these detailed instructions to delete the Teamspaces:

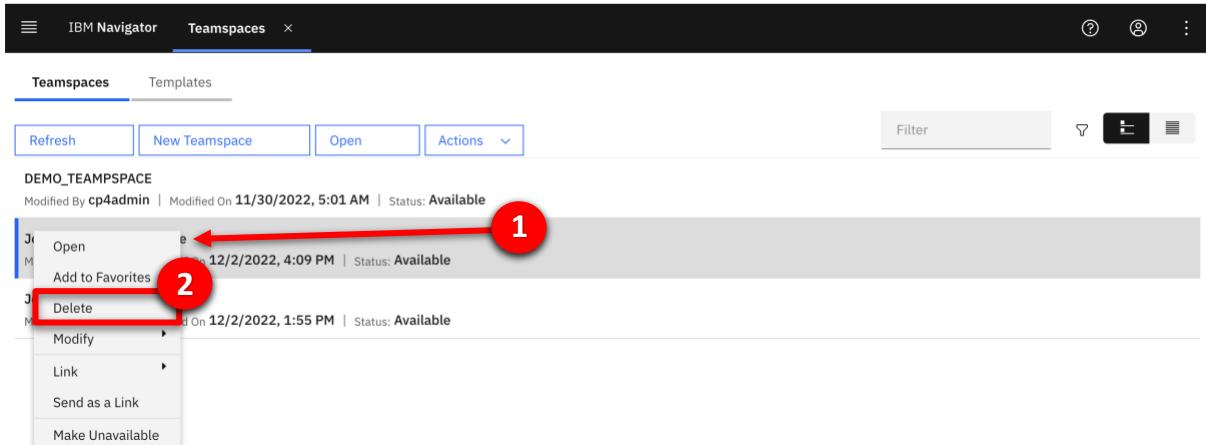
1. Open IBM Content Navigator using the URL from your cheat sheet. Enter the **Username** 'henry' and the **Password** 'henry' (1). Click **Log in** (2).



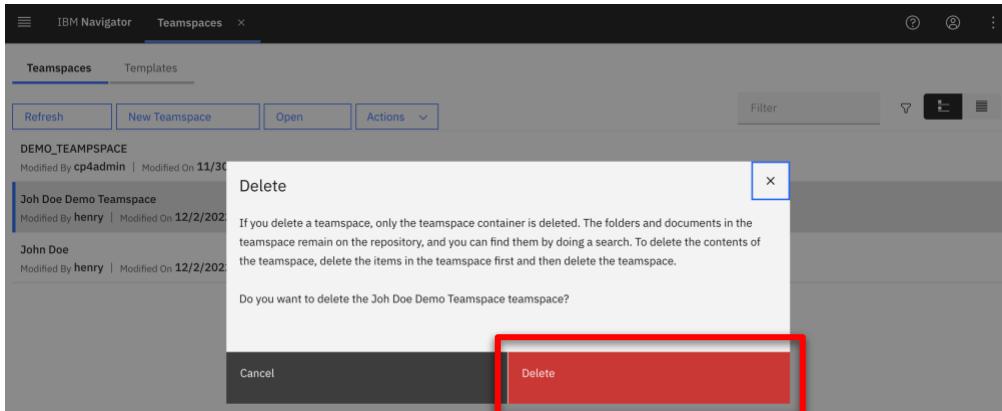
2. Click the **Teamsplaces** tile.



3. Right-click the **John Doe Teamspace** (1) and click **Delete** (2).



12. Click **Delete**.



13. Repeat steps 3 and 4 to delete the **John Doe Demo Teamspace**.

14. Repeat **7 - Create a finalized teamspace**.