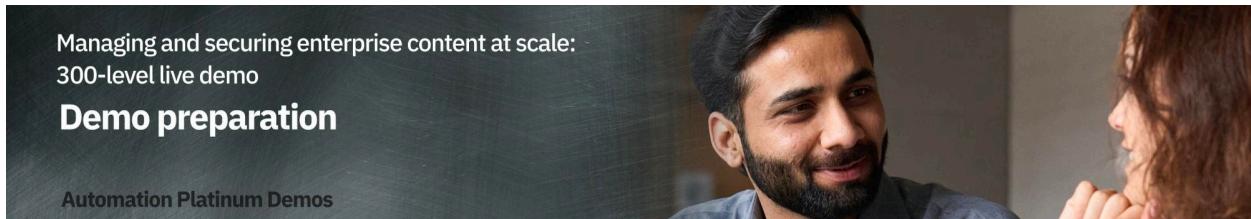


Managing and securing enterprise content at scale

300-level live demo script



Managing and securing enterprise content at scale:
300-level live demo

Demo preparation

Automation Platinum Demos

Introduction

Today we'll see how IBM's content management capabilities are used to manage and secure content across an organization at scale. We'll see how using an enterprise platform to share and manage content enhances productivity, increases security and mitigates risk.

Using an HR hiring scenario, we'll show how to easily configure a centralized repository for document collaboration. We'll look at how to secure documents using redaction and role-based access capabilities. And we'll see how the built-in workflow capabilities are used to manage document approvals.

We're using a hiring example, but the same document repository can extend and scale to many scenarios across your enterprise.

Let's get started!

1 - Configuring a new space for document collaboration

1.1 - Create a new teamspace

Narration

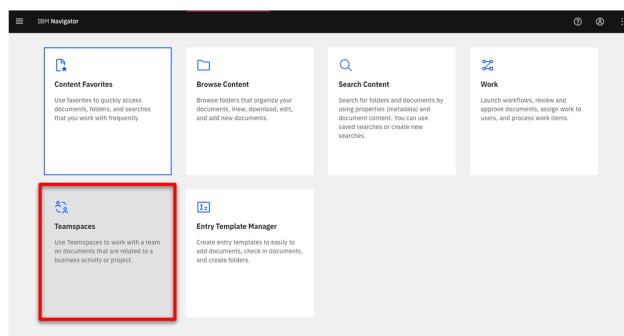
Focus Corp's HR department needed a way to organize job candidate documents and facilitate collaboration among hiring decision-makers. When a candidate submits a new application, the HR manager uses the company's enterprise content management system to create a teamspace, which is a dedicated place to share information and collaborate.

Action 1.1.1

- Show the IBM Content Navigator screen that you opened during demo preparation. Sign in using the **Username: henry** and **Password: henry**. Click **Log in**.

Action 1.1.2

- Click the **Teamspace** tile.



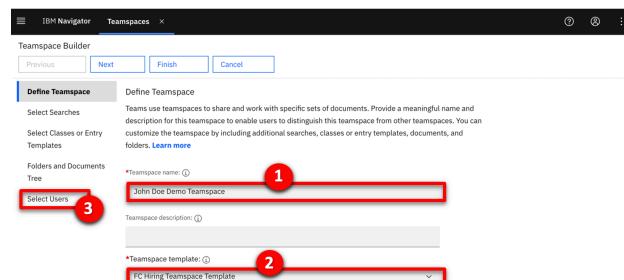
Action 1.1.3

- Click **New Teamspace**.



Action 1.1.4

- Enter '**John Doe Demo Teamspace**' (1) as the **Teamspace name**. Make sure the **Teamspace template** is **FC Hiring Teamspace Template** (2) and then click **Select Users** (3).

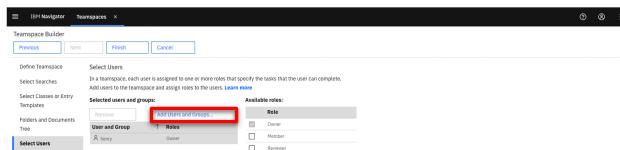


Narration

Once it is created, the HR manager provides teamspace access to the hiring and payroll managers so they can collaborate during the candidate's evaluation.

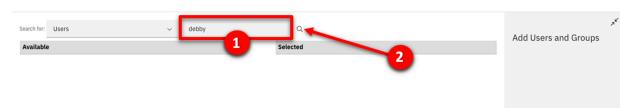
Action 1.1.5

- Click **Add Users and Groups...**



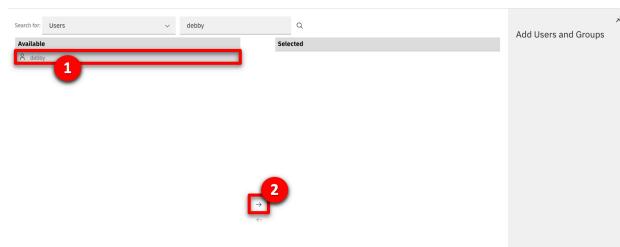
Action 1.1.6

- Type **debbby** in the search area (1) and click the **magnifier icon** (2).



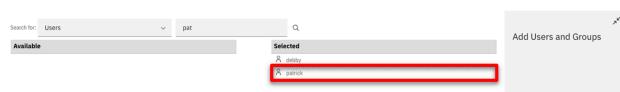
Action 1.1.7

- Select **debbby** (1), who is the hiring manager, and click the **right-facing arrow** (2) to move her from the **Available** list to the **Selected** list.



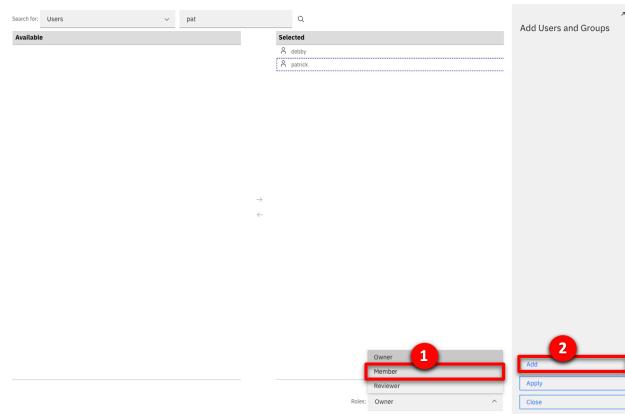
Action 1.1.8

- Repeat the previous steps to add **patrick**, the payroll manager, to the **Selected** list (1). Click **OK** (2).



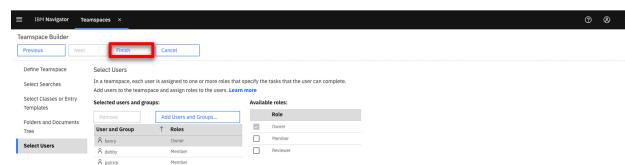
Action 1.1.9

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



Action 1.1.10

- Click **Finish**.



1.2 - Add files to share

Narration

The HR manager created the applicant's new teamspace based on Focus Corp's 'FC Hiring Teamspace' template. When a new teamspace is created using this template, it includes all the forms that need to be completed and submitted for each candidate.

Action 1.2.1

- Click the **HR Documents** folder.

The screenshot shows the 'John Doe Demo Teamspace' browser view. The 'Actions' dropdown is open, and the 'HR Documents' folder is highlighted with a red box. The table below lists three items: 'Candidate files', 'HR Documents', and 'Other'. The 'HR Documents' row is selected.

Name	Modified On	Comments	Downloads	Likes	Tags
Candidate files	henry	1/18/2023, 3:45 PM			
HR Documents	henry	1/18/2023, 3:45 PM			
Other	henry	1/18/2023, 3:45 PM			

Action 1.2.2

- Point out that the **HR Documents** folder is now open and the necessary documents are now available.

The screenshot shows the 'John Doe Demo Teamspace / HR Documents' browser view. A red box highlights the list of documents. The table lists several files, including 'FC Employment application.docx', 'FC Evaluation form.docx', 'FC Job offer.docx', 'FC Salary discussion form.docx', and a link to a PDF file from the USCS website.

Name	Size	Modified
FC Employment application.docx	86 KB	cp4admin 1/18/2022
FC Evaluation form.docx	48 KB	cp4admin 1/18/2022
FC Job offer.docx	22 KB	cp4admin 1/18/2022
FC Salary discussion form.docx	54 KB	cp4admin 1/18/2022
https://www.uscis.gov/sites/default/files/documents/forms-i-9/paper-version.pdf	1 KB	cp4admin 1/18/2022

Narration

The HR manager uses the HR document template to create copies that are specific to the applicant. When he does this in the teamspace, the documents are automatically shared with the rest of the hiring team.

The content management software applies the role-based access restrictions configured in the FC Hiring Teamspace template, which specifies the permissions granted to each team member.

Action 1.2.3

- Click the **Candidate files** folder.

The screenshot shows the 'John Doe Initial / Candidate files' browser view. A red box highlights the list of documents. The table lists several files, including 'FC Employment Application.docx', 'FC Evaluation form.docx', 'FC Job offer.docx', 'FC Salary discussion form.docx', and a link to a PDF file from the USCS website.

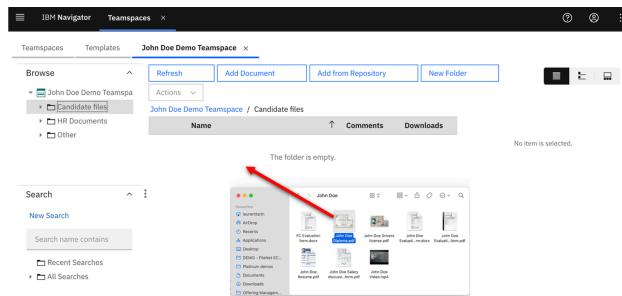
Name	Size	Modified
FC Employment Application.docx	86 KB	cp4admin 1/12/2022, 10:49 AM
FC Evaluation form.docx	48 KB	cp4admin 1/12/2022, 10:49 AM
FC Job offer.docx	22 KB	cp4admin 1/12/2022, 10:49 AM
FC Salary discussion form.docx	54 KB	cp4admin 1/12/2022, 10:49 AM
https://www.uscis.gov/sites/default/files/documents/forms-i-9/paper-version.pdf	1 KB	cp4admin 1/12/2022, 10:49 AM

Narration

The HR manager uploads the candidate's documents to the 'Candidate files' folder. He moves the files from his computer to the 'Candidate files' folder with a simple drag-and-drop.

Action 1.2.4

- Click the **John Doe Diploma.pdf** document and drag it from your local Documents folder to the **John Doe Demo Teamspace / Candidate files** folder in IBM Navigator.



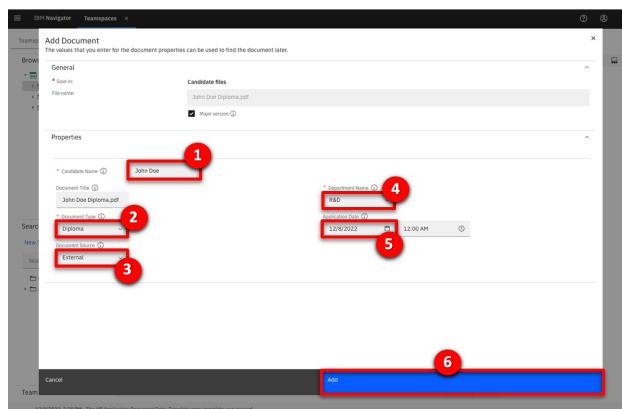
Narration

When the HR manager moves the files, a document entry form enables him to enter the required metadata.

Focus Corp's content administrator had previously worked with HR to define the metadata to include with files that are added to the teamspace. This metadata can be used later to quickly identify, classify, or search for a document.

Action 1.2.5

- Enter '**John Doe**' as the **Candidate Name** (1) and select **Diploma** as the **Document Type** (2). Select **External** for **Document Source** (3). This indicates that the document originated outside of Focus Corp.
- Select **R&D** for the **Department Name** (4) and set the **Application date** to the date 3 days in the future (5). Click **Add** (6).

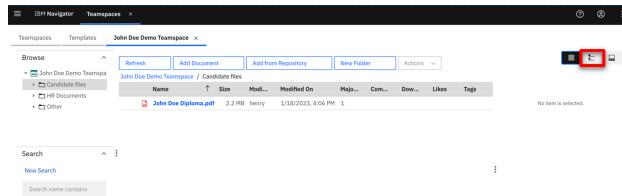


Narration

In the navigate view, team members can now add comments to the file, 'like' the file, or add the file to their favorites.

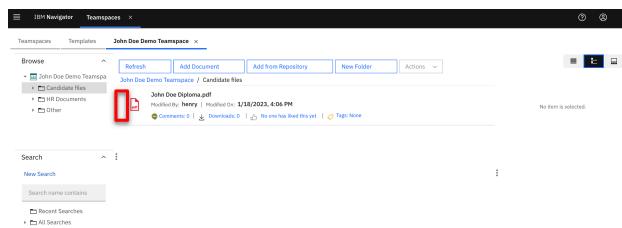
Action 1.2.6

- Click the **navigate view** icon.



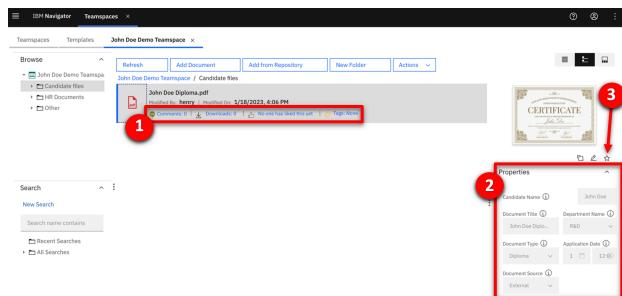
Action 1.2.7

- Select the **John Doe Diploma.pdf** row.
- NOTE:** Be sure to click within the row's white space (not the document name).



Action 1.2.8

- Point out the **document-related actions and information** (1), pre-defined **Properties** (2), and the **star** icon that adds the file to favorites (3).

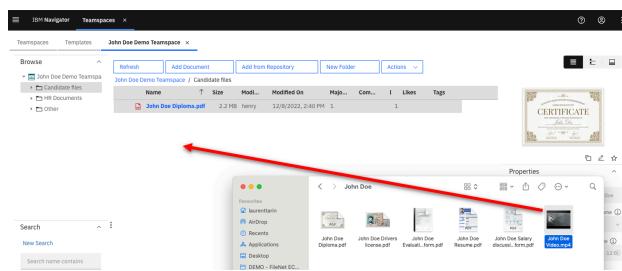


Narration

The candidate had previously submitted a video detailing his professional qualifications, strengths and weaknesses. The HR manager adds the video to the content management system.

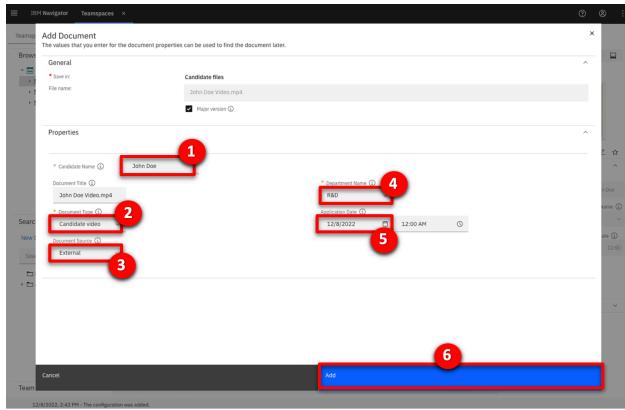
Action 1.2.9

- Move the **John Doe Video.mp4** file to the **Candidate files** folder.



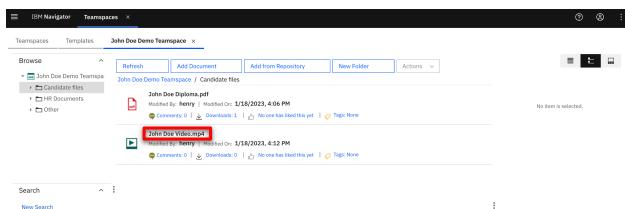
Action 1.2.10

- Enter '**John Doe**' as the **Candidate Name** (1) and select **Candidate Video** as the **Document Type** (2). Select **External** for **Document Source** (3).
- Select **R&D** for the **Department Name** (4) and set the **Application date** to the date 3 days in the future (5). Click **Add** (6).



Action 1.2.11

- Click **John Doe Video.mp4**.

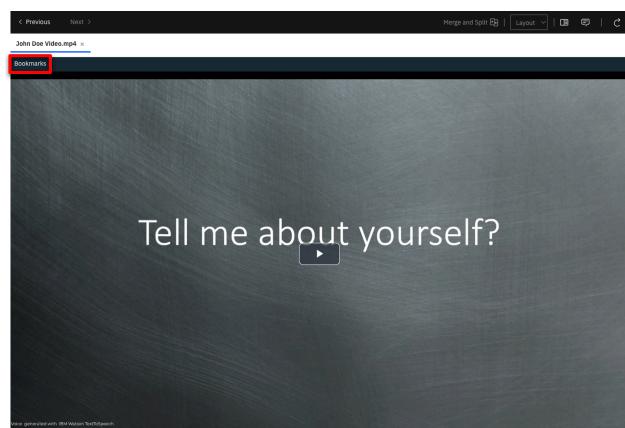


Narration

The hiring team wanted to quickly review specific candidate responses within the submitted video. The HR manager bookmarks the video, which allows hiring team members to go directly to the sections of the video they would like to see.

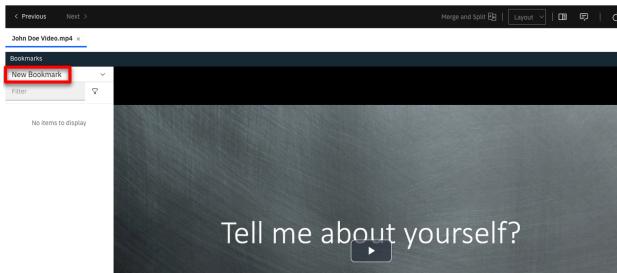
Action 1.2.12

- Click **Bookmarks**.



Action 1.2.13

- Click **New Bookmark**.

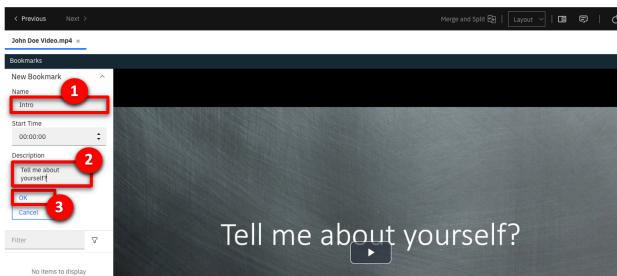


Narration

The HR manager adds bookmarks to the video to make it easier to find the individual responses.

Action 1.2.14

- Enter **Overview** (1) as the bookmark name, enter '**Tell me about yourself?**' (2) in the bookmark description and click **OK** (3).



Action 1.2.15

- Close the IBM Navigator Viewer window.

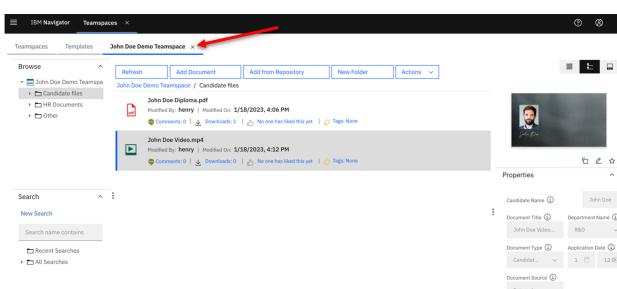
Narration

The HR manager bookmarks the remaining sections of the video and adds the applicant's other documents to his candidate file.

Let's jump ahead and see the teamspace with all the documents added.

Action 1.2.16

- Click **x** to close the **John Doe Demo Teamsphere**.



Action 1.2.17

- Click **John Doe**.

The screenshot shows the IBM Navigator interface with the 'Teamspace' tab selected. A search bar at the top has 'John Doe' typed into it. Below the search bar, there are two entries: 'John Doe' (Modified On: 1/18/2023, 12:54 PM | Status: Available) and 'John Doe Denry Teamspace' (Modified On: 3/28/2023, 2:45 PM | Status: Available). The 'John Doe' entry is highlighted with a red box.

Action 1.2.18

- Click **Candidate files**.

The screenshot shows the 'Candidate files' view for John Doe. The left sidebar shows a tree structure with 'John Doe' expanded, revealing 'Candidate Files' which is also highlighted with a red box. The main area displays a table of documents:

Name	Modified By	Modified On	Comments	Downloads	Likes	Tags
John Doe	cp44mhs	11/24/2022, 10:00 AM				
Candidate File	cp44mhs	11/24/2022, 10:00 AM				
John Doe Documents	henry	11/23/2022, 3:27 PM				
Other	henry	11/23/2022, 3:27 PM				

Action 1.2.19

- Click the **Magazine view** icon.

The screenshot shows the 'Candidate files' view for John Doe in Magazine view. The left sidebar shows a tree structure with 'John Doe' expanded, revealing 'Candidate Files'. The main area displays a table of documents, and the 'Magazine view' icon is highlighted with a red box in the top right corner of the table header.

Name	Size	Mod...	Modif...	Mag...	Com...	Downloads	Likes	Tags
John Doe Diploma.pdf	2.2 MB	henry	11/23/2022, 3:31 PM	1				
John Doe Drivers License.pdf	1.5 MB	henry	11/23/2022, 3:35 PM	1				
John Doe Resume.pdf	143 KB	henry	11/23/2022, 3:36 PM	1				
John Doe Video.mp4	39.7 MB	henry	11/23/2022, 3:38 PM	1				

Narration

Now the hiring team can collaborate on the applicant's documents.

1.3 - Manage role-based redactions

Narration

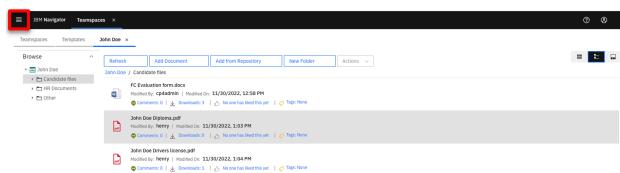
To adhere to Focus Corp's privacy guidelines, HR must prevent unauthorized access to the applicant's personal information, such as his home address.

The HR manager uses role-based redactions to automatically mask sensitive information, based on each user's role. The role-based access capabilities enable Focus Corp to explicitly define who has permission to see the redacted information.

The HR manager starts by validating that the role-based redactions have been set correctly by the content administrator.

Action 1.3.1

- Click the **hamburger** icon to open the IBM Navigator menu.

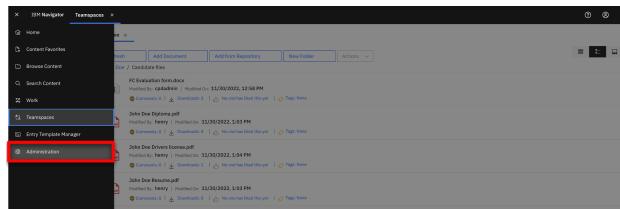


Narration

The HR manager uses the Administration menu to review and update the role-based access.

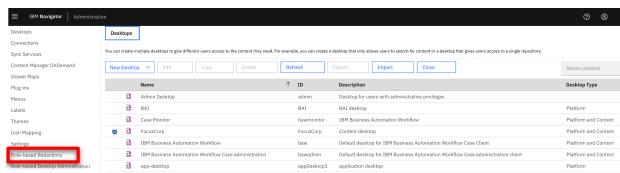
Action 1.3.2

- Click **Administration**.



Action 1.3.3

- Click **Role-based Redactions**.



Narration

The HR manager reads through the 'Private Information' redaction policy, which specifies who can see a candidate's private information.

Action 1.3.4

- Double-click **Private Information**.

The screenshot shows the 'Reasons' tab of the 'Role-based Redactions' section. A red box highlights the 'Private Information' row, which has a name of 'Private Information' and a description of 'Candidate personal information'. Other rows include 'Credit Card Number' and 'Social Security Number'.

Action 1.3.5

- Click **Policies and Roles**.

The screenshot shows the 'Reasons' tab of the 'Role-based Redactions' section. A red box highlights the 'Edit' button next to the 'Private Information' row.

Action 1.3.6

- If prompted, enter the **User name ‘cp4admin’** and the **Password** (1) from your cheat sheet. Click **Log In** (2).

The screenshot shows a 'Log In' dialog box. A red box highlights the 'User name' field containing 'cp4admin'. Another red box highlights the 'Log In' button.

Narration

The 'Private Information' reason contains two redaction roles: editors and viewers. *Editors* can add or remove redactions. *Viewers* can see redacted information but cannot change it. No other users can view redacted information.

Action 1.3.7

- Scroll down (1) and point out the payroll manager's role as a **FC Reduction viewer** (2).

The screenshot shows the 'Policies and Roles' tab of the 'Role-based Redactions' section. A red box highlights the scroll bar. Another red box highlights the 'FC Reduction viewer' role entry in the list.

Narration

The HR manager verifies that only Patrick, the payroll manager, can view private information. Other members of the hiring team, such as the hiring manager, will not be able to access the redacted information.

Confident that these settings are correct, the HR manager is ready to redact the documents.

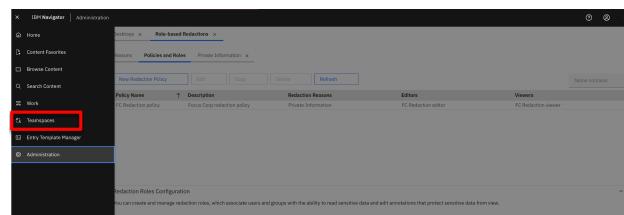
Action 1.3.8

- Click the **hamburger icon**.



Action 1.3.9

- Click **Teamspace**.



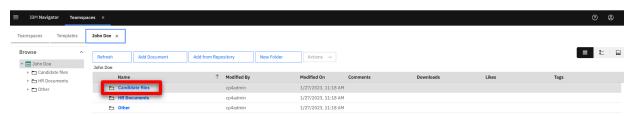
Action 1.3.10

- Click **John Doe**.



Action 1.3.11

- Click **Candidate files**.

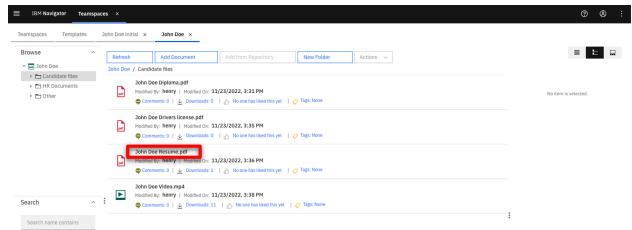


Narration

The HR manager opens the applicant's resume, selects the information to redact, and indicates it is private information.

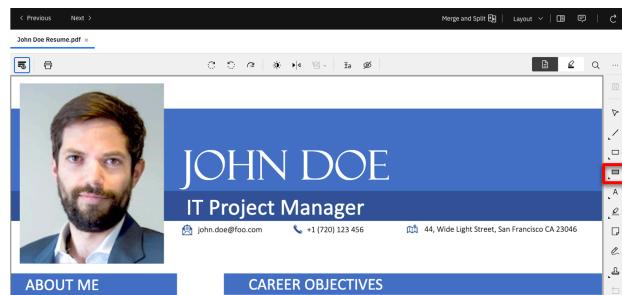
Action 1.3.12

- Click **John Doe Resume.pdf** to open it in the document viewer.



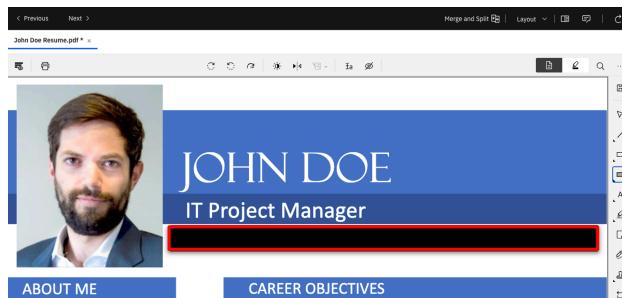
Action 1.3.13

- Click the **redaction** icon, which is a darkened rectangle.



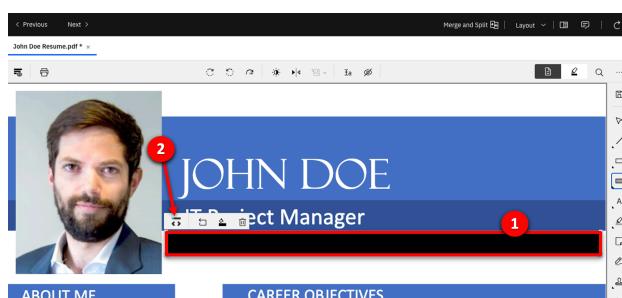
Action 1.3.14

- Redact the applicant's email address, phone number and home address by drawing a rectangle around them using the redaction tool.



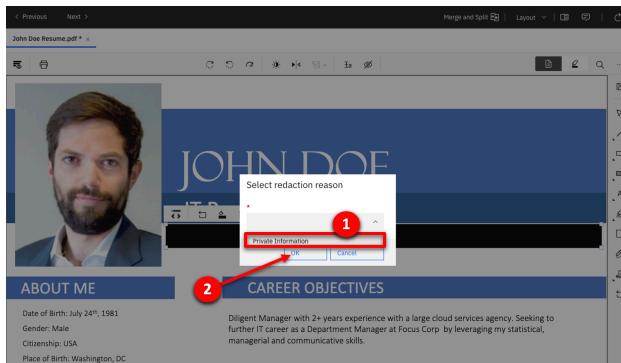
Action 1.3.15

- Right-click the **redaction rectangle** (1) and click the **document redaction reason** icon (2).



Action 1.3.16

- Select **Private Information** as the redaction reason (1) and click **OK** (2).



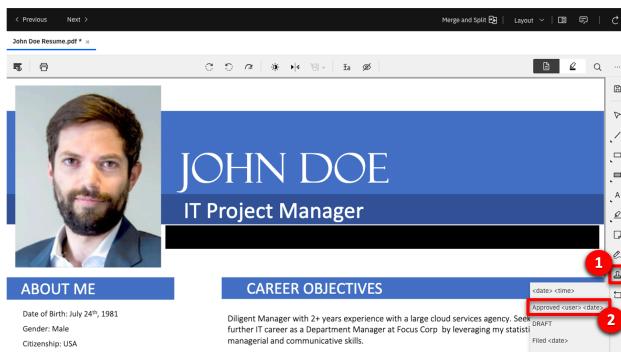
Narration

This hides the applicant's personal information from users who do not have viewing rights. The hiring manager does not have viewing rights to this information and will not be able to see it.

The HR manager acknowledges they have reviewed and verified the applicant's details by adding a notation on the document.

Action 1.3.17

- Click the **stamp** icon (1) and select the **Approved <user> <date>** stamp (2).

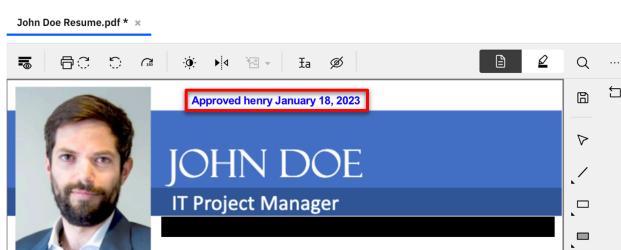


Narration

The HR manager uses a pre-defined annotation to indicate he has verified the applicant meets specific job criteria.

Action 1.3.18

- Click above the name on the document to add the annotation.

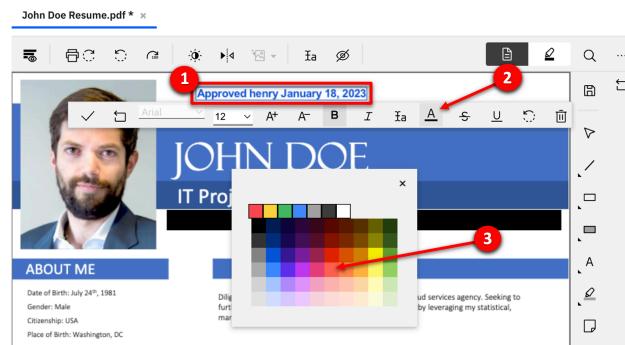


Narration

The HR manager changes the notation color to indicate that the applicant is eligible for a face-to-face interview.

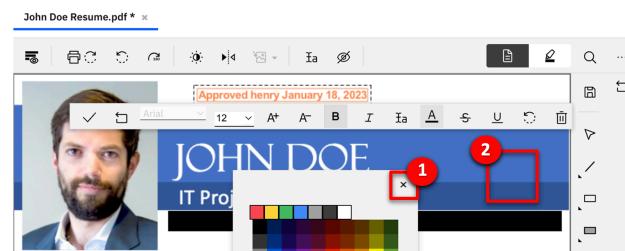
Action 1.3.19

- Right-click the **annotation** (1), select the **text color** icon (2), and select **orange** (3).



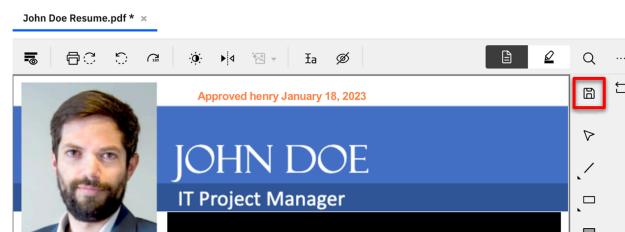
Action 1.3.20

- Click the **x** to close the color selector view (1) and click anywhere in the document to close the menu (2).



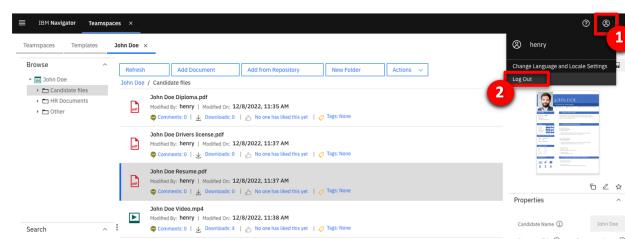
Action 1.3.21

- Click the **save** icon and close the IBM Navigator Viewer window.



Action 1.3.22

- Click the **user** icon (1) and click **Log Out** (2) to exit IBM Navigator.



2 - Accessing and viewing content

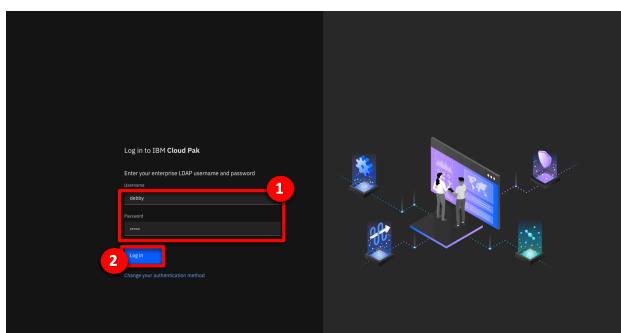
2.1 - View documents in a teamspace

Narration

The hiring manager needs to learn more about the applicant. She reviews the documents shared by HR.

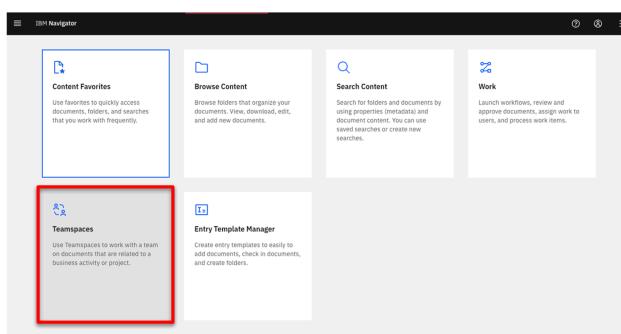
Action 2.1.1

- Sign into IBM Navigator using the hiring manager's credentials:
Username: debby and **Password: debby** (1). Click **Log in** (2).



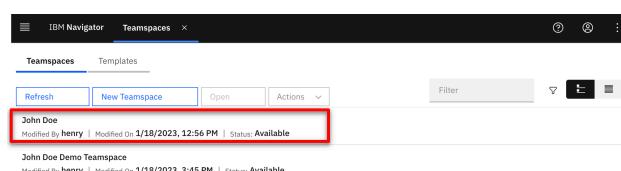
Action 2.1.2

- Click the **Teamspace** tile.



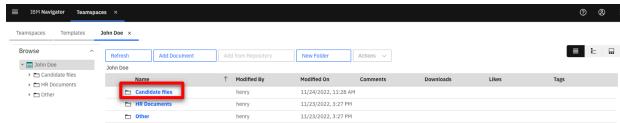
Action 2.1.3

- Select the **John Doe** teamspace.



Action 2.1.4

- Click **Candidate files**.



Narration

The hiring manager reviews the applicant's resume.

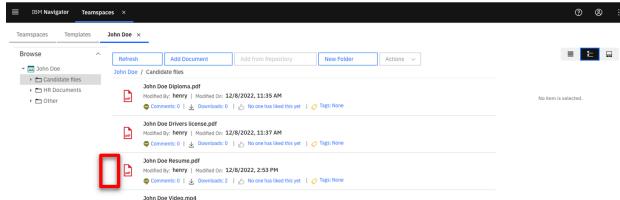
Action 2.1.5

- Click the **Magazine view** icon.



Action 2.1.6

- Select the **John Doe Resume.pdf** row.
- NOTE:** Be sure to click within the row's white space (not the document name).

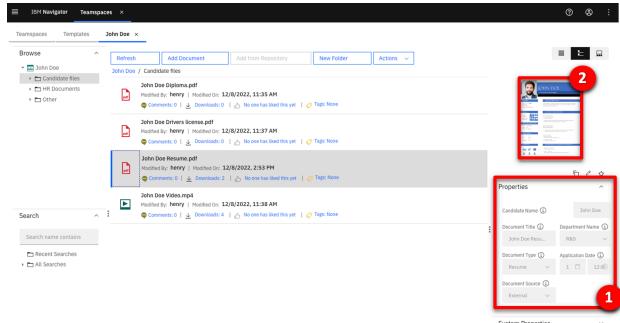


Narration

The hiring manager confirms that the metadata required by her department is pre-populated in the properties section. She is not authorized to view the applicant's personal information, so it is concealed in the document preview thumbnail.

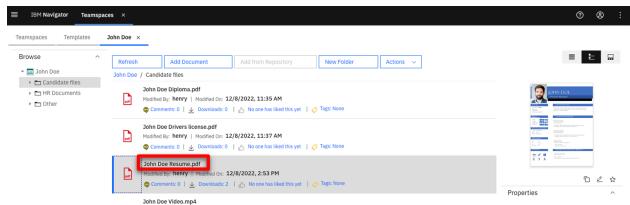
Action 2.1.7

- Review the **Properties** section (1) and point out that the address information is redacted in the hiring manager's **thumbnail** view (2).



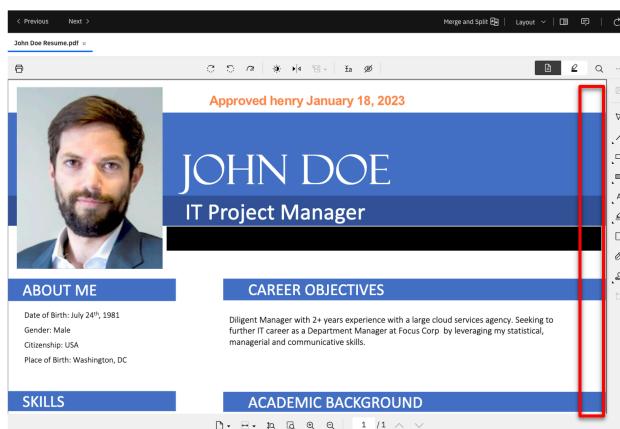
Action 2.1.8

- Click **John Doe Resume.pdf**.



Action 2.1.9

- Scroll down to show the resume.



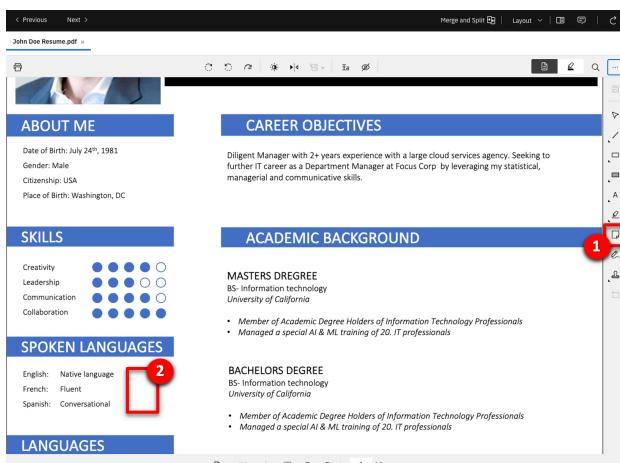
Narration

The hiring manager reviews the details of the resume. The candidate is applying for a position that often works with a team in France. Therefore, a working knowledge of French is required for the job.

She adds an annotation to assess the applicant's French language skills.

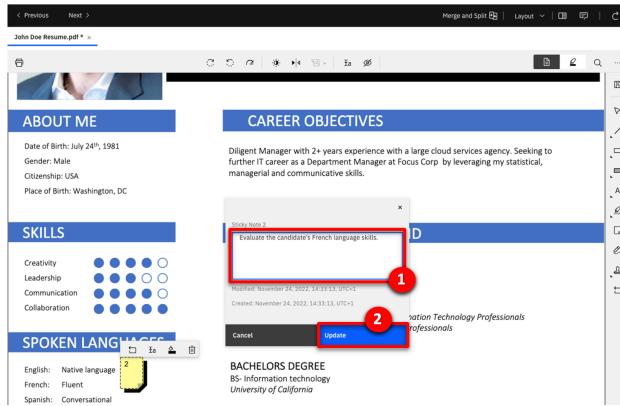
Action 2.1.10

- Click the **sticky note** icon (1) and then click next to the **SPOKEN LANGUAGES** section (2).



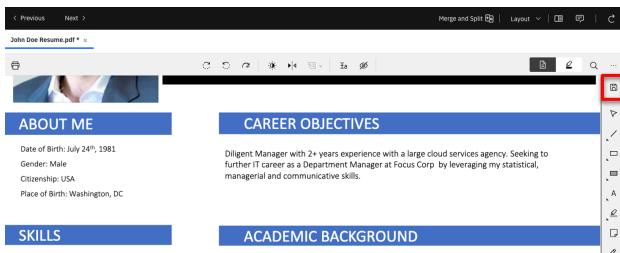
Action 2.1.11

- Type ‘Evaluate the candidate’s French language skills.’ (1) and click **Update** (2).



Action 2.1.12

- Click the **save** icon.



Action 2.1.13

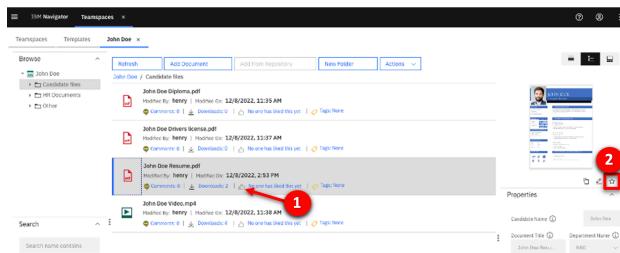
- Close the IBM Navigator Viewer window.

Narration

The hiring manager ‘likes’ the resume and adds it to her favorites so she can compare the finalists later.

Action 2.1.14

- Click the **thumbs-up** icon (1) to ‘like’ the file. Click the **star** icon (2) to add the resume to favorites.

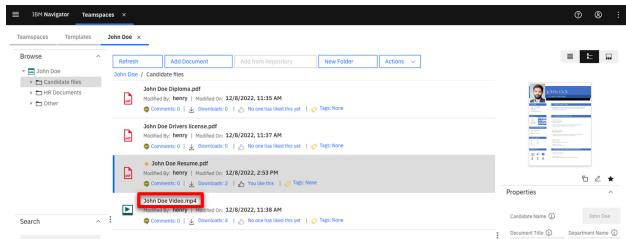


Narration

To help decide whether to move forward with an interview, the hiring manager watches a few specific sections of the applicant’s video.

Action 2.1.15

- Click **John Doe Video.mp4**.

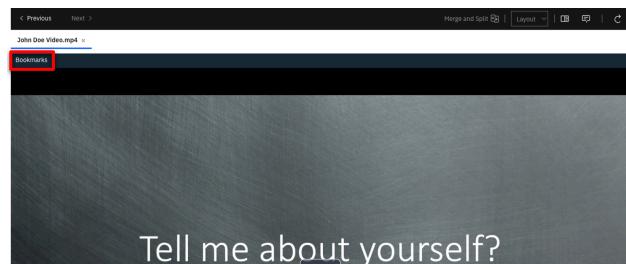


Narration

She uses bookmarks in the applicant's video to skip directly to responses she's interested in. Many applicant videos are over 20 minutes. The bookmark feature saves her time by letting her focus on specific parts of the video.

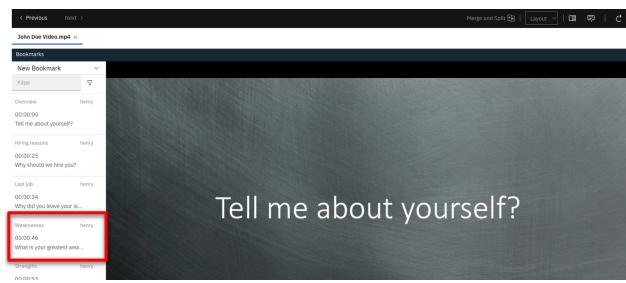
Action 2.1.16

- Click **Bookmarks** to open the bookmarks menu.



Action 2.1.17

- Select the **Weaknesses** bookmark and wait for the video to load.



Action 2.1.18

- Click the **play** icon and watch both the Weaknesses and Strengths sections. Close the IBM Navigator viewer when you are done.



Action 2.1.19

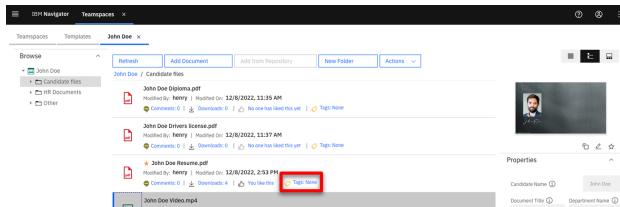
- Close the **IBM Navigator Viewer** window.

Narration

The hiring manager decides to interview the applicant. She lets the HR team know to schedule an interview by tagging the applicant's resume with the word 'selected'.

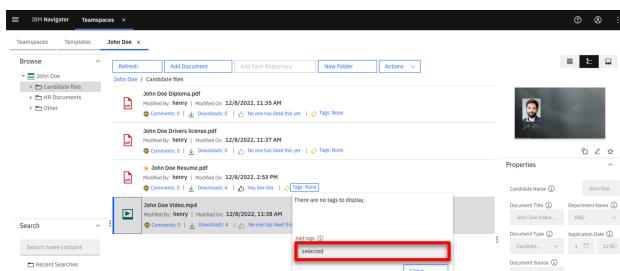
Action 2.1.20

- Click **Tags** in the **John Doe Resume.pdf** row.



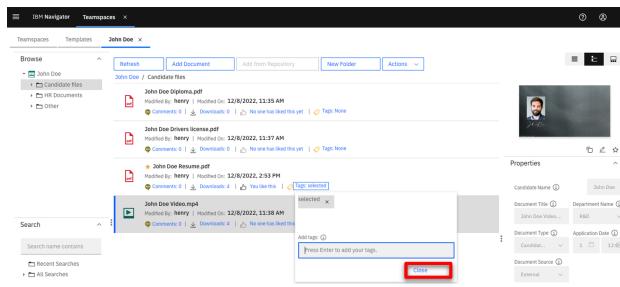
Action 2.1.21

- Write '**selected**' and hit enter on your keyboard.



Action 2.1.22

- Click **Close**.



Narration

The hiring team schedules the interview. To prepare, the hiring manager reviews the content she previously 'favorited'.

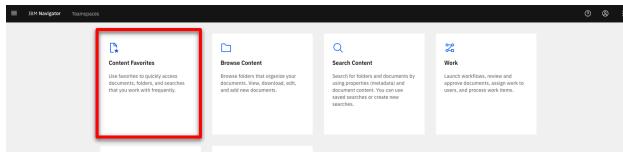
Action 2.1.23

- Click **IBM Navigator**.



Action 2.1.24

- Click the **Content Favorites** tile.



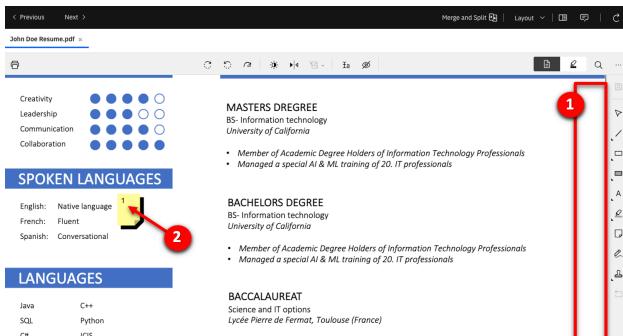
Action 2.1.25

- Double-click **John Doe Resume.pdf**.



Action 2.1.26

- Scroll down to the **sticky note** (1) and hover your mouse over the note (2).



Narration

She looks over the resume and annotations. The sticky note reminds her she must evaluate the candidate's French language skills.

Action 2.1.27

- Point out the annotation.



Action 2.1.28

- Close the IBM Navigator Viewer window.

3 - Annotating and merging documents

3.1 - Edit and add content

Narration

The hiring manager needs to capture interview feedback on the candidate evaluation form. She downloads the form from Teamspace's document templates.

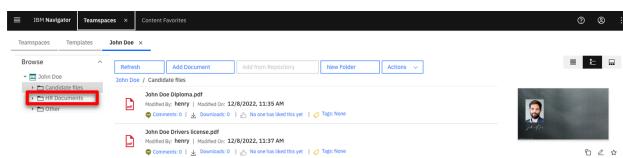
Action 3.1.1

- Click **Teamspace**.



Action 3.1.2

- Click **HR Documents**.

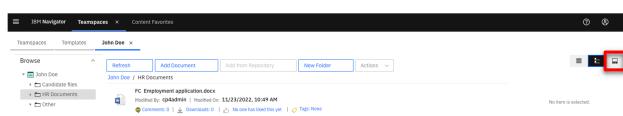


Narration

The filmstrip view helps the hiring manager see the available HR documents. She chooses the 'Evaluation form' and creates a copy in the applicant's Candidate files folder.

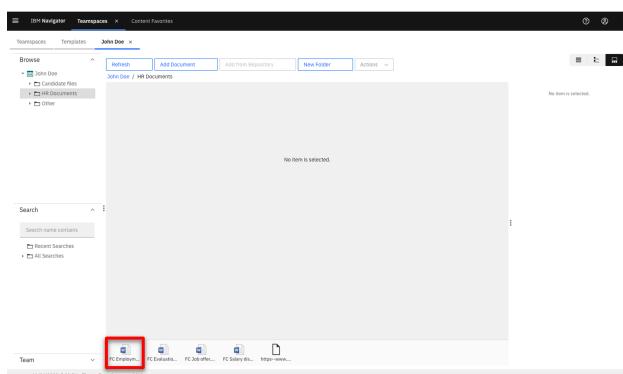
Action 3.1.3

- Click the **Filmstrip view** icon.



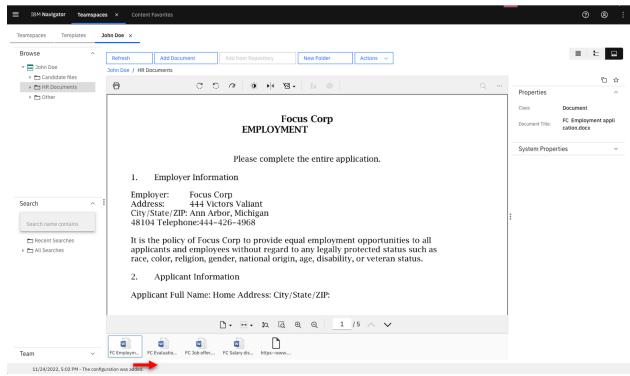
Action 3.1.4

- Click the first document on the bottom left of the filmstrip viewer.



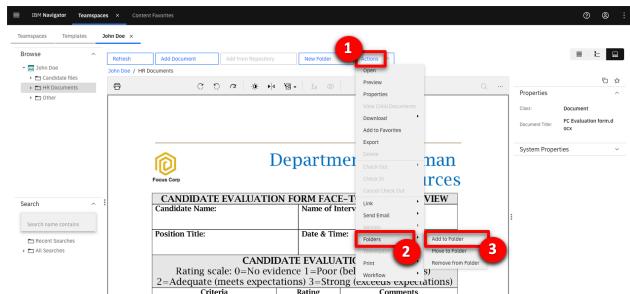
Action 3.1.5

- Scroll right until you see the **FC Evaluation form** in the viewer.



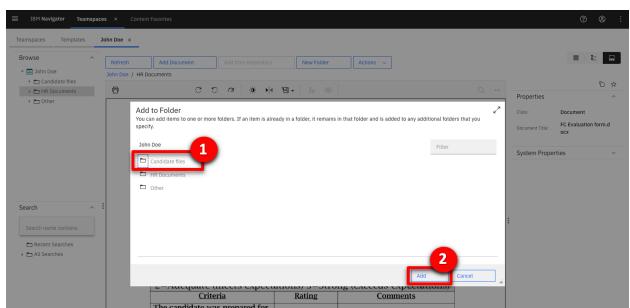
Action 3.1.6

- Click **Actions** (1), then click **Folders** (2). Select **Add to Folder** (3).



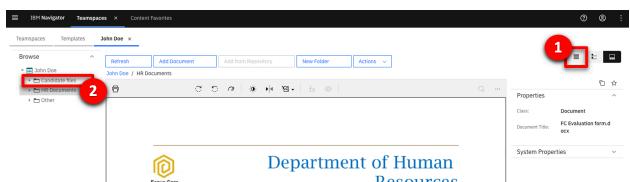
Action 3.1.7

- Select **Candidate files** (1) and click **Add** (2).



Action 3.1.8

- Click the **details view** icon (1) and click **Candidate files** (2).

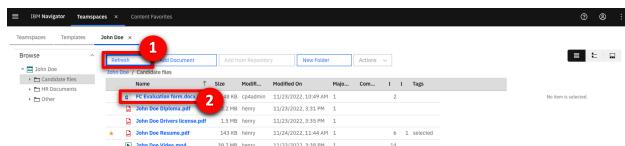


Narration

The hiring manager opens the evaluation form directly from the applicant's teamspace files so she can edit the form during the interview.

Action 3.1.9

- Click **Refresh** (1) and then Click **FC Evaluation form.docx**.

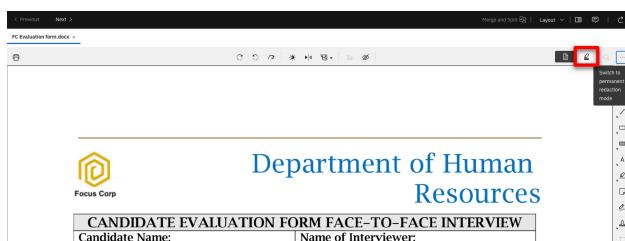


Narration

The hiring manager switches to permanent redaction mode, which 'hard codes' her updates to the document for every subsequent viewer.

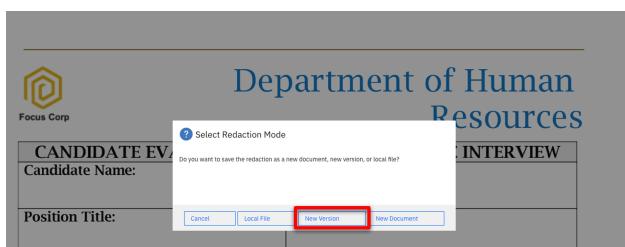
Action 3.1.10

- Click the **permanent redaction mode marker** icon.

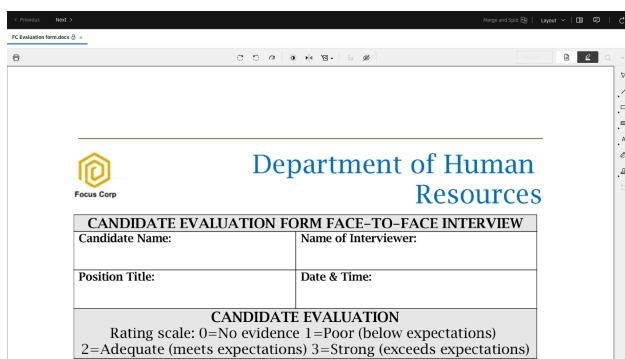


Action 3.1.11

- Click **New Version**.

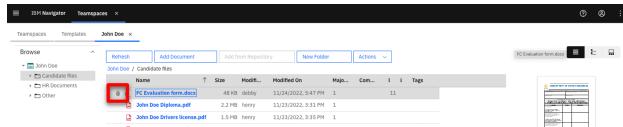


- The fillable version of the candidate evaluation form displays.



Action 3.1.12

- Return to the IBM Navigator view window. Point out the **lock** icon.

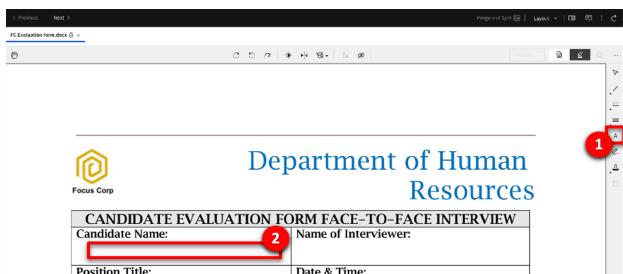


Narration

While the hiring manager edits the document, it is locked to prevent anyone else from making edits.

Action 3.1.13

- Return to the candidate evaluation form, click the **text** icon (1), and then select the free text field under **Candidate Name** (2).

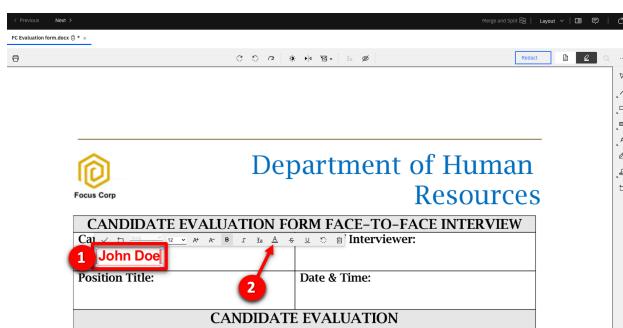


Narration

She adds the candidate's name and changes the text color to blue to highlight it.

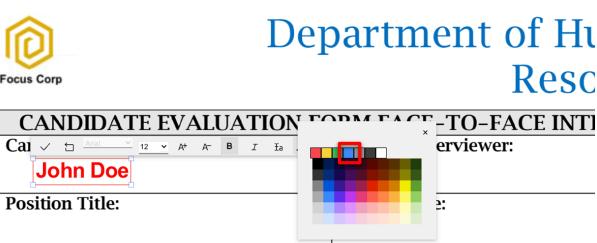
Action 3.1.14

- Type '**John Doe**' (1) and click the **font color** icon (2).



Action 3.1.15

- Select blue.



Action 3.1.16

- Close the **color selector view** (1) and click the **checkmark** (2) to accept the annotation changes.

The screenshot shows a "CANDIDATE EVALUATION FORM FACE-TO-FACE INTERVIEW" document. At the top left is the Focus Corp logo. The title "Department of Human Resources" is centered above the form. The form has two text input fields: "Candidate Name: John Doe" and "Name of Interviewer:". Below these is a "Position Title:" field. A color selector dialog is open over the "Position Title:" field, with a red circle labeled "1" pointing to the top-left corner of the dialog. A red circle labeled "2" points to the checkmark icon in the bottom right corner of the dialog. The status bar at the bottom of the screen shows "CANDIDATE EVALUATION".

Narration

The hiring manager needs to capture the date and time to ensure compliance with regulatory rules. She uses the annotation tools to add these details to the form.

Action 3.1.17

- Click the **stamp** icon (1), select **<date> <time>** (2), and click in the free text area under **Date & Time** (3).

The screenshot shows the same candidate evaluation form. A stamp annotation tool is open on the right side of the screen, with a red circle labeled "1" pointing to its icon. A red arrow labeled "2" points from the stamp icon to the "Date & Time" field. A red circle labeled "3" points to the empty "Date & Time" field. The status bar at the bottom shows "CANDIDATE EVALUATION".

Action 3.1.18

- Click the date annotation.

The screenshot shows the candidate evaluation form with a date annotation. The "Date & Time" field now contains the text "November 17, 2022, 15:29:27, UTC+1". A red arrow points from the previous screenshot's step 3 to this annotated date. The status bar at the bottom shows "CANDIDATE EVALUATION".

Action 3.1.19

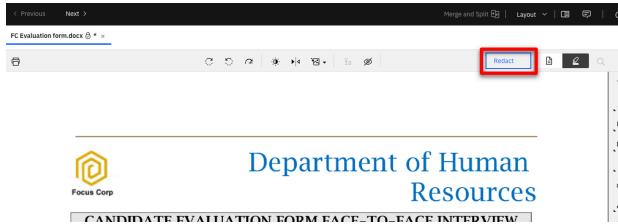
- Click the color icon, select blue, close the color selector and validate the update (as done previously in steps 3.1.14-16).

Narration

At the end of the interview, the hiring manager saves the document with her edits.

Action 3.1.20

- Click **Redact**.



Action 3.1.21

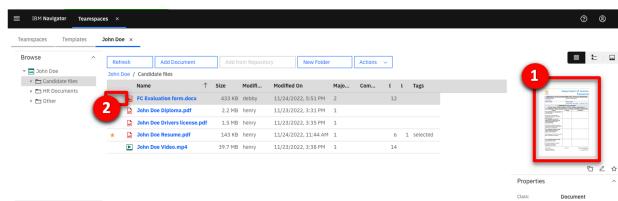
- Wait for the redaction to complete. Close IBM Navigator Viewer window.

Narration

The document thumbnail is updated to reflect the hiring manager's changes. The document is automatically unlocked so other team members can now edit it.

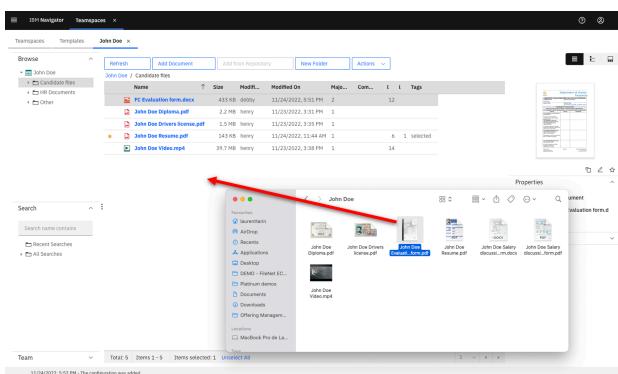
Action 3.1.22

- Point out that the **FC Evaluation form preview thumbnail** is updated (1) and the document is no longer **locked** (2).



Action 3.1.23

- Drag and drop **John Doe evaluation form.pdf** to the **Candidate files** folder.

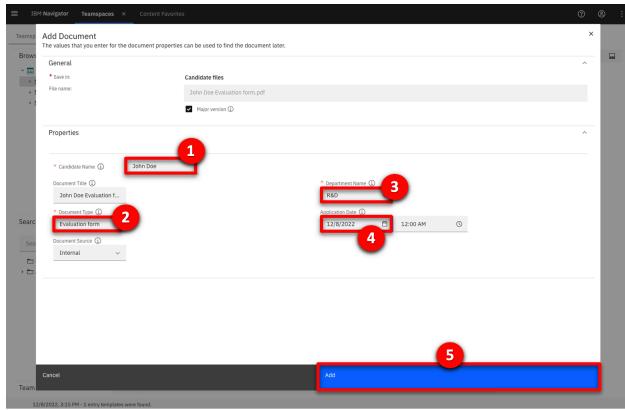


Narration

The hiring manager must add the required metadata to meet departmental standards.

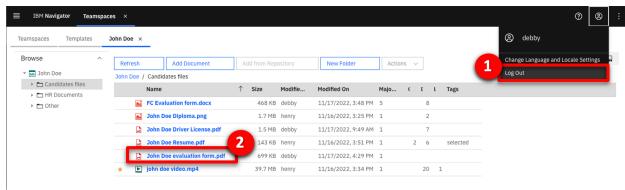
Action 3.1.24

- Enter '**John Doe**' as the **Candidate Name** (1) and select **Evaluation form** as the **Document Type** (2).
- Select **R&D** for the **Department Name** (3) and set the **Application date** to the current date (4). Click **Add** (5).



Action 3.1.25

- Show that a copy of the **Evaluation form** is added (1). **Log Out** of IBM Navigator (2).



3.2 - Merge documents

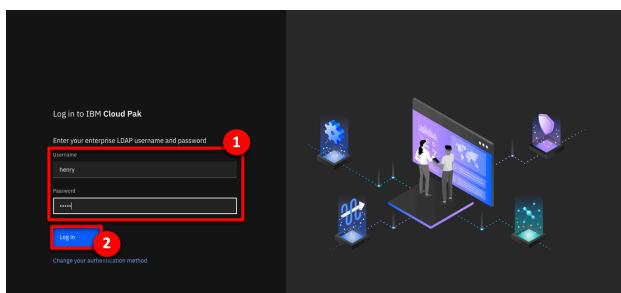
Narration

The hiring manager has decided to make an offer to the applicant.

The HR manager suggests a salary based on the feedback added to the salary discussion form. He needs to get approval for the salary from both the hiring and payroll managers.

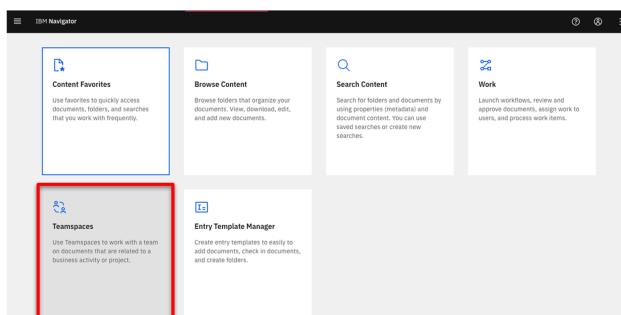
Action 3.2.1

- Sign into IBM Navigator using **Username: henry** and **Password: henry** (1). Click **Log in** (2).



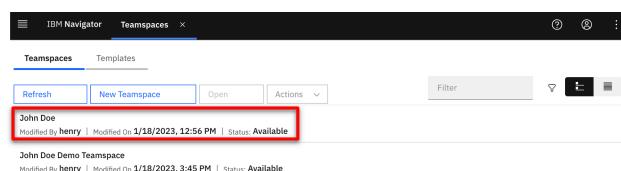
Action 3.2.2

- Click the **Teamspace** tile.



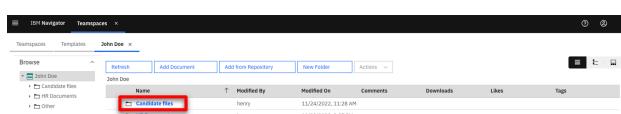
Action 3.2.3

- Select the **John Doe Teamspace**.



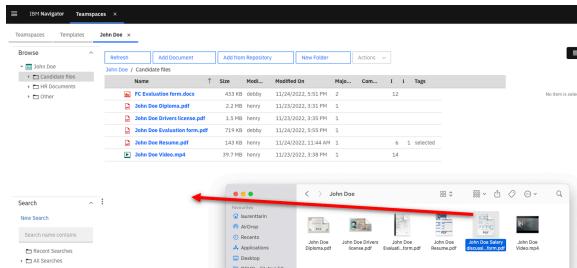
Action 3.2.4

- Click **Candidate files**.



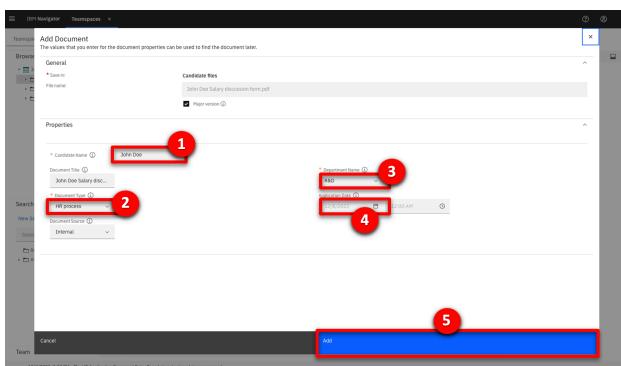
Action 3.2.5

- Drag the **John Doe salary discussion form.pdf** from your local documents to the **Candidates files** folder in IBM Navigator.



Action 3.2.6

- Enter '**John Doe**' as the **Candidate Name** (1) and select **HR Process** as the **Document Type** (2).
- Select **R&D** for the **Department Name** (3) and set the **Application date** to the current date (4). Click **Add** (5).

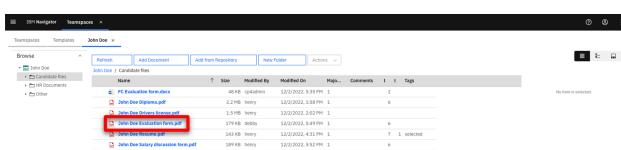


Narration

The HR manager merges the second page from the evaluation form, and the salary discussion form, into a single document to simplify the salary approval.

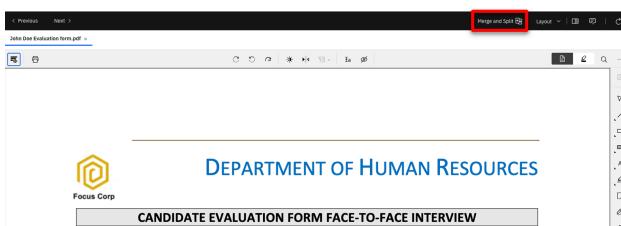
Action 3.2.7

- Click **John Doe Evaluation form.pdf**.



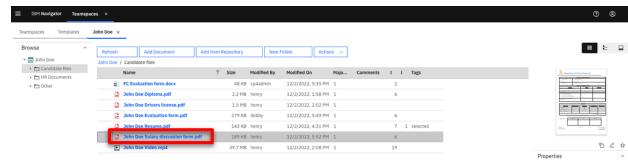
Action 3.2.8

- Click **Merge and Split** at the top right of the viewer.

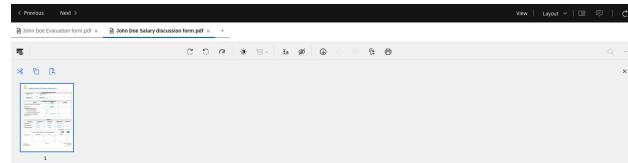


Action 3.2.9

- Return to **Candidate files** and click **John Doe Salary discussion form.pdf**.



- The final merge and split interface should match the view below:

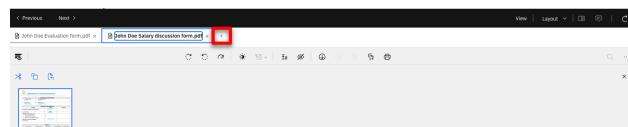


Narration

Now that the documents are added to the 'merge and split' tool, the HR manager creates a summary document by merging the pages required for salary approval.

Action 3.2.10

- Click the + icon to create a new document.



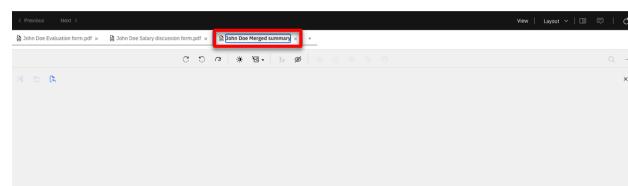
Action 3.2.11

- Right-click on the **New Document** tab (1) and select **Rename** (2).



Action 3.2.12

- Enter '**John Doe Merged summary**'.



Narration

First, he adds the second page of the evaluation form.

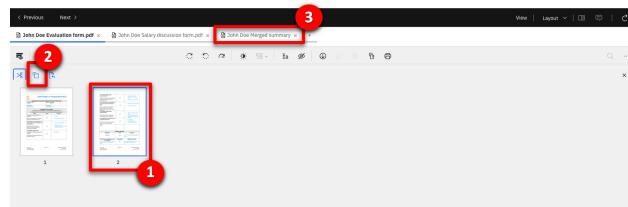
Action 3.2.13

- Click the **John Doe Evaluation form.pdf** tab.



Action 3.2.14

- Click the **second page of the document** (1) in the thumbnail viewer. Click the **copy** icon (2) and click the **John Doe Merged summary.pdf** tab (3) to return to the new document.



Action 3.2.15

- Click the **paste** icon.

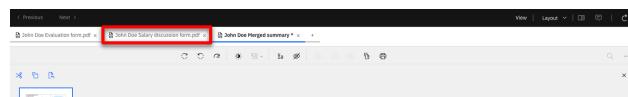


Narration

Then he adds the salary discussion form.

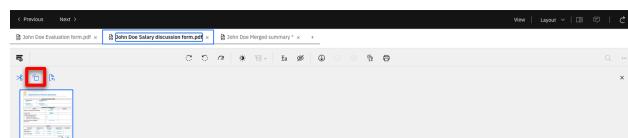
Action 3.2.16

- Click the **John Doe Salary discussion form.pdf** tab.



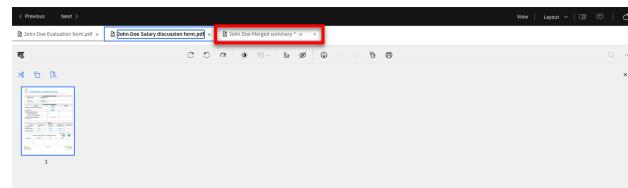
Action 3.2.17

- Click the **copy** icon.



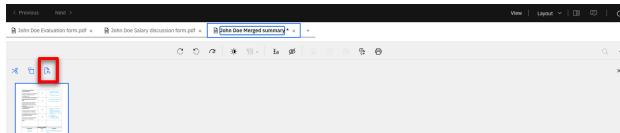
Action 3.2.18

- Click the **John Doe Merged summary.pdf** tab.



Action 3.2.19

- Click the **paste** icon.

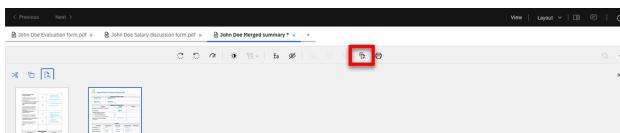


Narration

He now saves the document and fills in the required properties to add it to the applicant's candidate files folder.

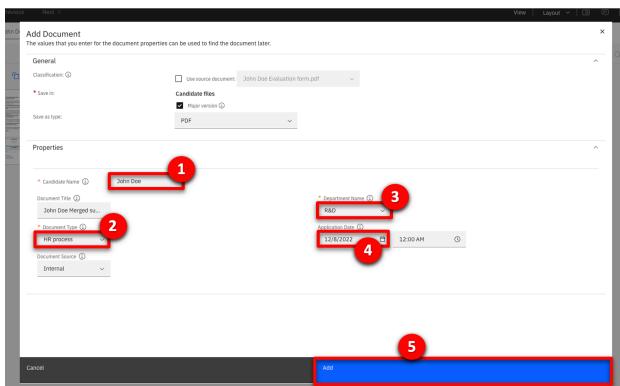
Action 3.2.20

- Click the **add document** icon.



Action 3.2.21

- Enter '**John Doe**' as the **Candidate Name** (1) and select **HR process** as the **Document Type** (2).
- Select **R&D** for the **Department Name** (3), set the **Application date** to the current date (4). Click **Add** (5).



Action 3.2.22

- Close the IBM Navigator Viewer.

Action 3.2.23

- Select the new **John Doe Merged summary.pdf** document.
- NOTE:** Be sure to click within the row's white space (not the document name).

The screenshot shows the IBM Navigator interface with the 'Teamspaces' tab selected. A search bar at the top has 'John Doe' typed into it. Below the search bar, there are buttons for 'Archive', 'Add Document', 'Add from Repository', and 'New Folder'. A dropdown menu labeled 'Actions' is open. On the left, a sidebar titled 'Browse' shows a tree structure with 'John Doe' expanded, revealing 'Candidate Res' and 'Other' branches. Under 'Other', several PDF files are listed: 'PC Evaluation form.pdf', 'John Doe Diploma.pdf', 'John Doe Drivers license.pdf', 'John Doe Evaluations form.pdf' (which is highlighted with a red square), 'John Doe Merged summary.pdf' (which is also highlighted with a red square), 'John Doe Resume.pdf', 'John Doe Safety checklist.pdf', and 'John Doe Video.pdf'. The 'John Doe Merged summary.pdf' file is the fourth item in the list. The main area displays a table with columns: Name, Size, Modified On, Pages, Cover, and Tags. The 'John Doe Merged summary.pdf' row is selected, indicated by a blue border around the entire row. The status bar at the bottom right says 'No item is selected.'

Name	Size	Modified On	Pages	Cover	Tags
PC Evaluation form.pdf	45 KB	10/01/2022, 11:28 AM	1		
John Doe Diploma.pdf	2.2 KB	Henry	12/01/2022, 11:38 AM	1	
John Doe Drivers license.pdf	1.5 KB	Henry	12/01/2022, 11:37 AM	1	
John Doe Evaluations form.pdf	179 KB	Henry	12/01/2022, 9:20 PM	1	
John Doe Merged summary.pdf	291 KB	Henry	12/01/2022, 9:31 PM	1	
John Doe Resume.pdf	143 KB	Henry	12/01/2022, 9:32 PM	1	
John Doe Safety checklist.pdf	187 KB	Henry	12/01/2022, 9:33 PM	1	
John Doe Video.pdf	29.7 MB	Henry	12/01/2022, 11:38 AM	1	

Narration

The merged document is now ready to be approved by the stakeholders.

4 - Managing the document approval process

4.1 - Launch a validation process

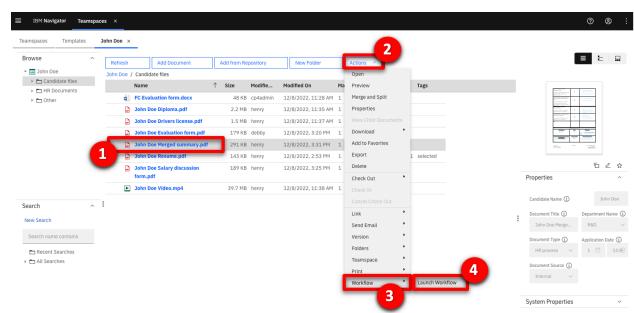
Narration

The HR manager needs hiring stakeholders to approve the salary offer.

Using the built-in document approval workflow, he routes the salary request to the hiring manager for approval. Once she approves, the request will automatically proceed to the payroll manager for his final approval.

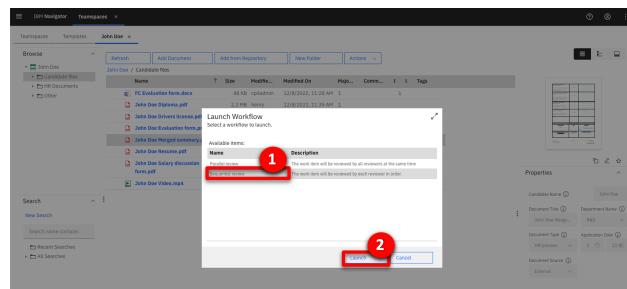
Action 4.1.1

- Select the **John Doe Merged summary.pdf** row (1). Then click **Actions** (2), select **Workflow** (3), and click **Launch Workflow** (4).



Action 4.1.2

- Select **Sequential review** in the **Name** dropdown list (1) and click **Launch** (2).

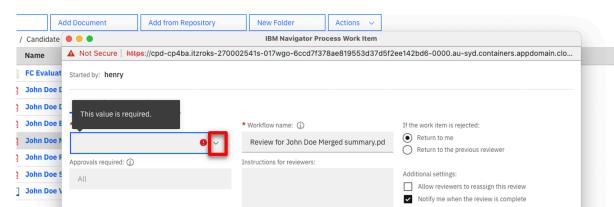


Narration

The HR manager specifies Debby, the hiring manager, as the first approver.

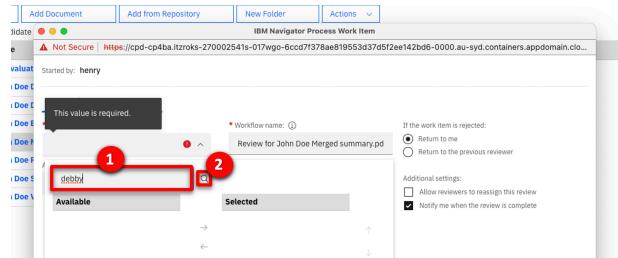
Action 4.1.3

- Click the downward arrow to expand the **Reviewers** dropdown list.



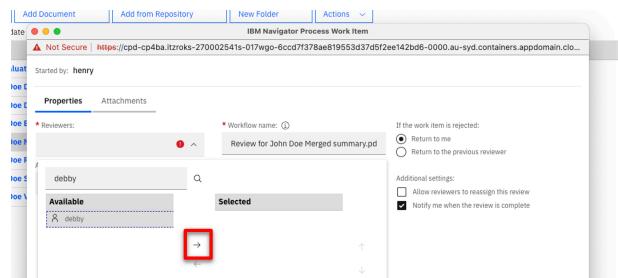
Action 4.1.4

- Type '**debby**' (1) and click the **magnifier** icon (2).



Action 4.1.5

- Click the **right-facing arrow** to move the userid **debby** from the **Available** list to the **Selected** list.

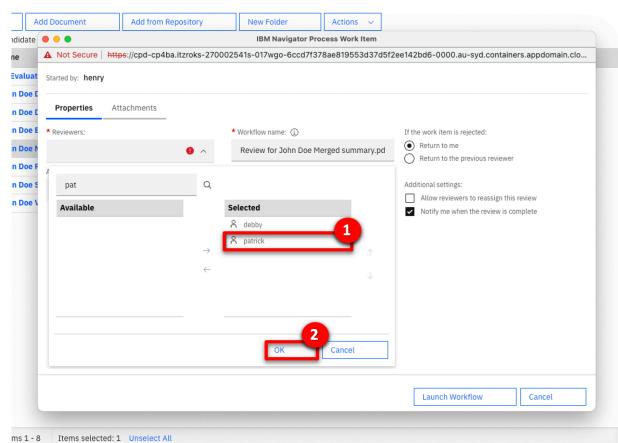


Narration

Now the HR manager adds Patrick, the payroll manager, to the approval process.

Action 4.1.6

- Repeat the previous step to add **patrick** to the **Selected list** (1). Click **OK** (2).

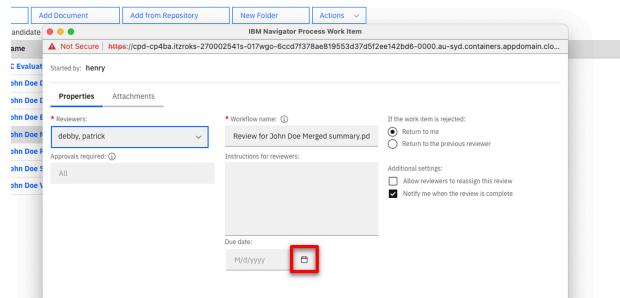


Narration

Next, the HR manager sets a due date for the approvers to respond with their approvals.

Action 4.1.7

- Click the **date selector** to select a date approximately three business days from the current date.

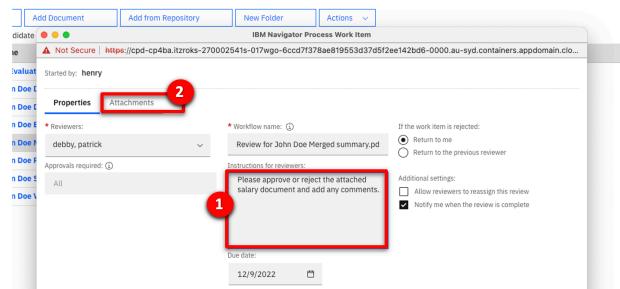


Narration

The HR manager adds instructions for the approvers, validates that the salary discussion document is attached to the message, and launches the salary approval workflow.

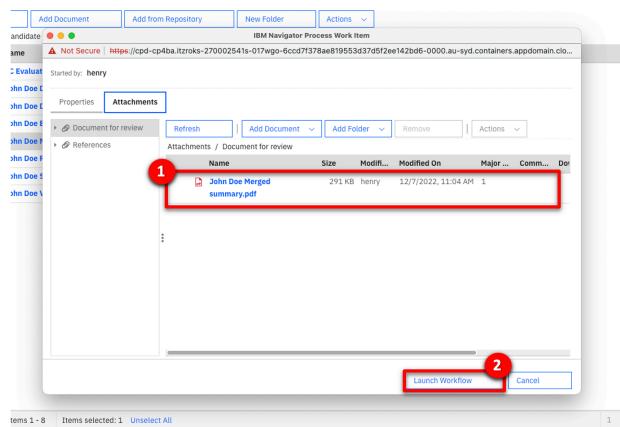
Action 4.1.8

- Enter '**Please approve or reject the attached salary request document, and add any comments.**' in the **Instructions for reviewers** field (1). Click the **Attachments** tab (2).



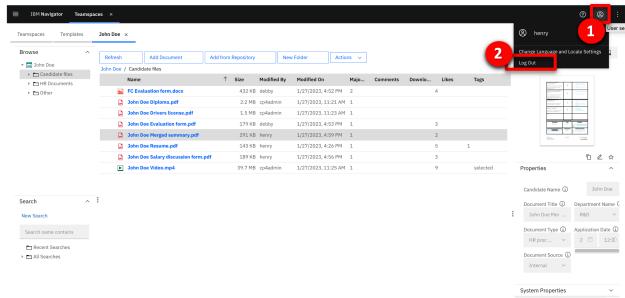
Action 4.1.9

- Point out that the **John Doe Merged summary.pdf** is automatically attached (1). Click **Launch Workflow** (2).



Action 4.1.10

- Click the user icon (1) and click Log Out (2).



4.2 - Review work items

Narration

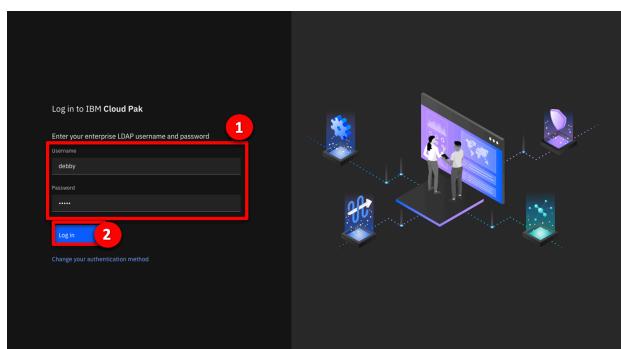
The hiring manager is notified that she needs to approve the salary request. She logs in to review the request.

In a real implementation, the notification would include a link to access the approval form. For this demonstration, we are showing a version that does not require setting up outside email accounts to demonstrate this functionality.

If she approves the request, a notification will automatically be sent to the payroll manager for his approval.

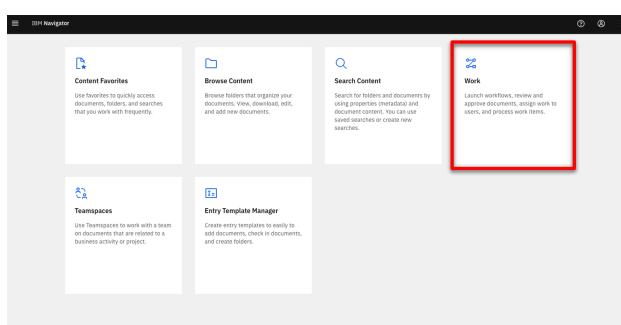
Action 4.2.1

- Sign into IBM Navigator using the hiring manager's credentials:
Username: debby and **Password: debby** (1). Click **Log in** (2).



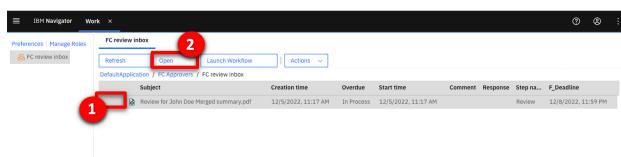
Action 4.2.2

- Click the **Work** tile.



Action 4.2.3

- Select the **Review for John Doe Merged summary.pdf** row (1) and click **Open** (2).

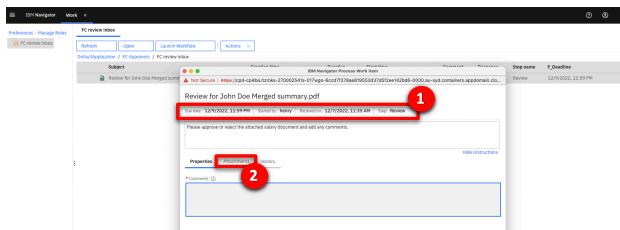


Narration

The hiring manager opens the notification. She sees the request for salary approval, the requester name, and the due date.

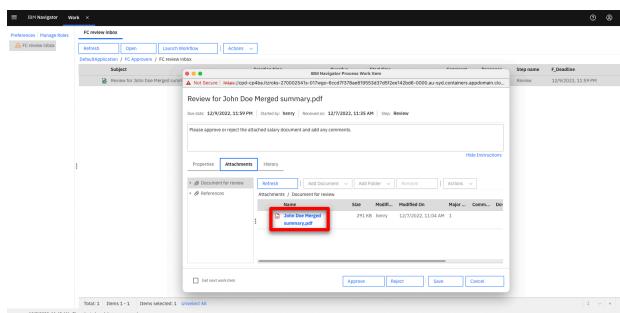
Action 4.2.4

- Point out the process details (1) and click the **Attachments** tab (2).



Action 4.2.5

- Click the **John Doe Merged summary.pdf**.

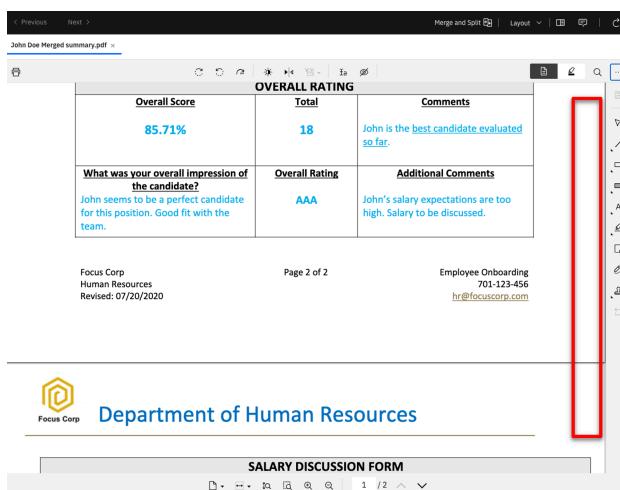


Narration

The hiring manager reviews all the documents pertinent to the salary decision. She approves the requested salary.

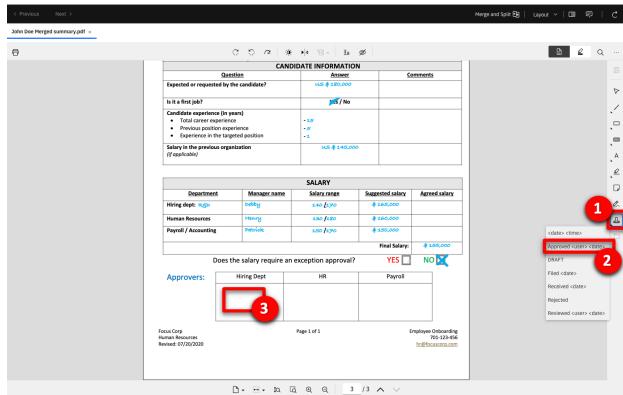
Action 4.2.6

- Scroll down to show that the merged document includes the second page of the applicant's evaluation form and the salary discussion form.



Action 4.2.7

- Click the **stamp** icon (1) and select **Approved user date** (2). Click in the **Hiring Dept box** (3) to place the stamp.

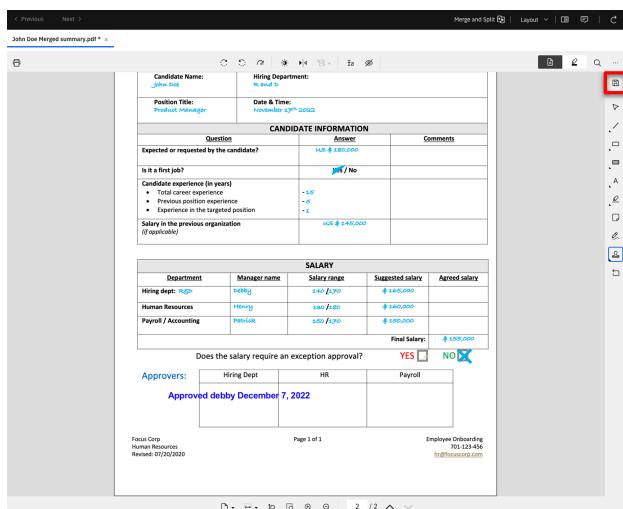


Narration

When the hiring manager approves, the stamp automatically generates her name and the approval date.

Action 4.2.8

- Click the **save** icon.



Action 4.2.9

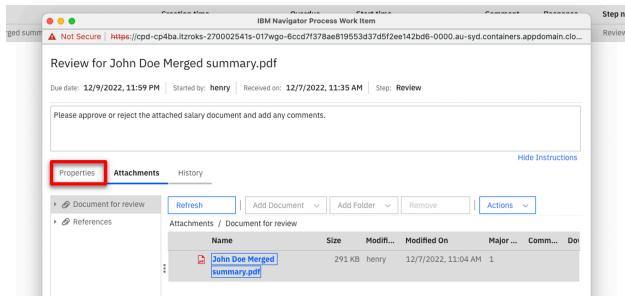
- Close the IBM Navigator Viewer window.

Narration

Now the hiring manager adds her comments.

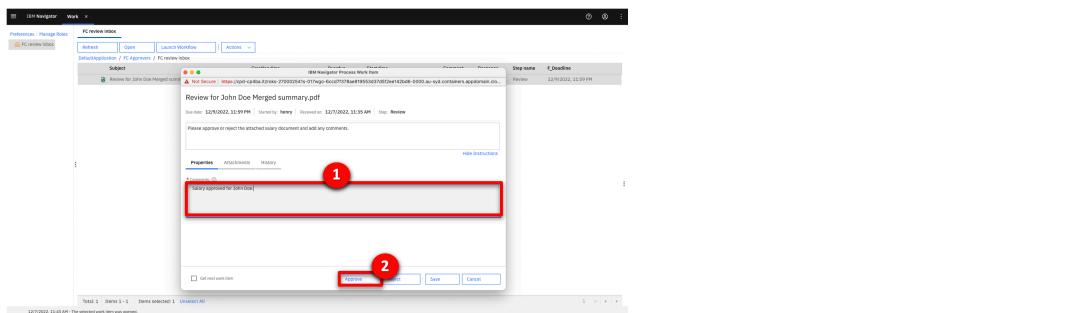
Action 4.2.10

- Click the **Properties** tab.



Action 4.2.11

- In the **Comments** dialogue box, enter '**Salary approved for John Doe.**' (1). Click **Approve** (2).



Narration

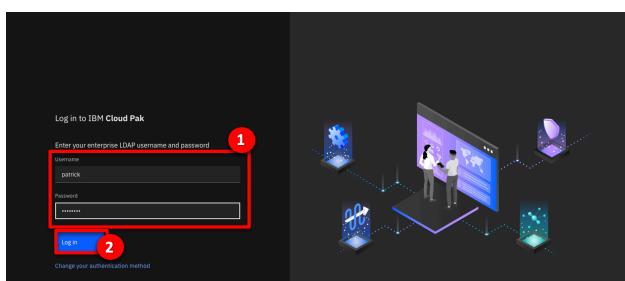
After the hiring manager approves the salary, the request is automatically sent to the payroll manager.

Action 4.2.12

- Log out** from IBM Navigator.

Action 4.2.13

- Sign back into IBM Navigator using the payroll manager's credentials:
Username: patrick and **Password: patrick** (1). Click **Log in** (2).

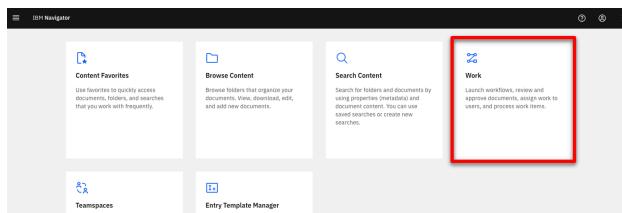


Narration

When the payroll manager receives a notification to approve the salary request, he logs in to review the request.

Action 4.2.14

- Click the **Work** tile.



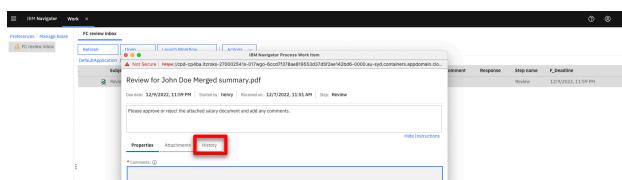
Action 4.2.15

- Click **Open**.



Action 4.2.16

- Click the **History** tab.

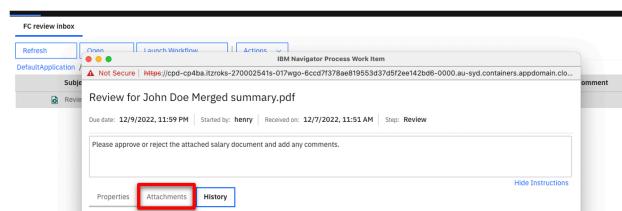


Narration

The payroll manager now sees that the hiring manager has approved the salary. He reviews the pertinent documents.

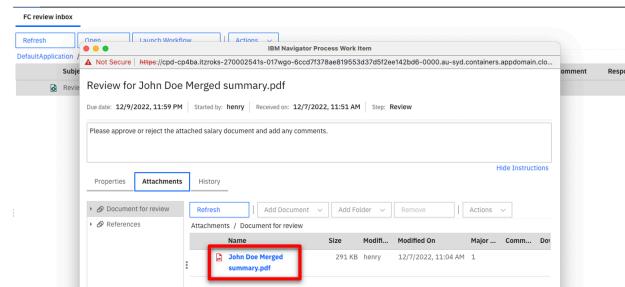
Action 4.2.17

- Click the **Attachments** tab.



Action 4.2.18

- Click the **John Doe Merged Summary.pdf**.

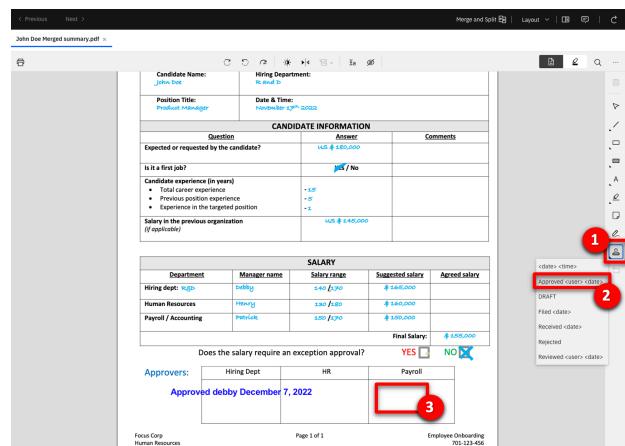


Narration

The payroll manager adds his approval.

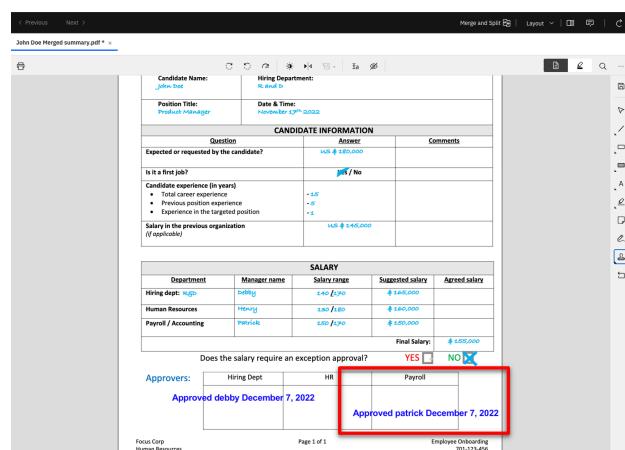
Action 4.2.19

- Scroll to the end of the document. Click the **stamp** icon (1) and select **Approved user date** (2). Click in the **Payroll** box (3) to add the stamp.



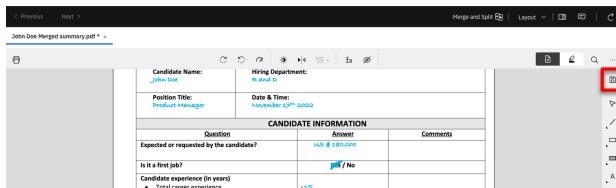
Action 4.2.20

- Point out the payroll manager's approval is added to the document.



Action 4.2.21

- Click the **save** icon.



Action 4.2.22

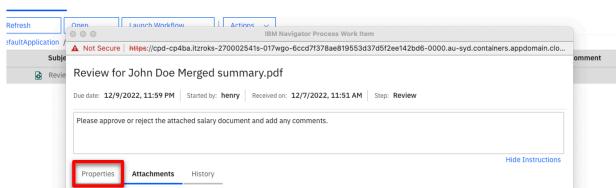
- Close the IBM Navigator Viewer.

Narration

The payroll manager adds his comments to the approval.

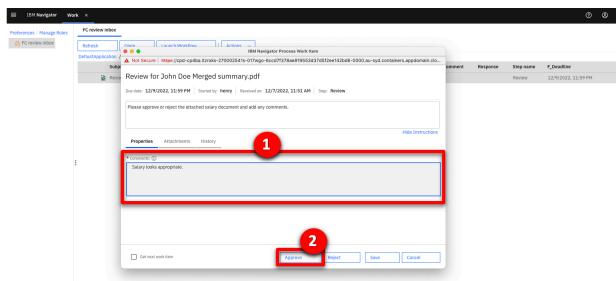
Action 4.2.23

- Click the **Properties** tab.



Action 4.2.24

- Enter '**Salary looks appropriate.**' in the **Comments** dialogue box (1). Click **Approve** (2).



Narration

A notification is automatically sent to the HR manager stating that the workflow tasks are complete.

Action 4.2.25

- Log out from IBM Navigator.

Narration

The notification to the HR manager indicates the salary has been approved. He logs in and reviews the hiring team's comments.

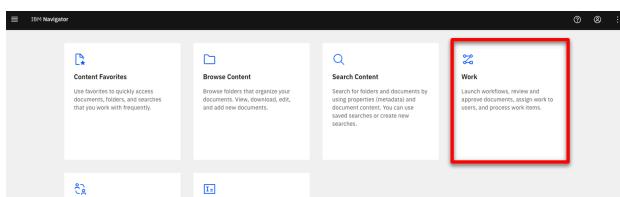
Action 4.2.26

- Sign back in as the HR manager using **Username: henry** and **Password: henry** (1). Click **Log in** (2).



Action 4.2.27

- Click **Work**.



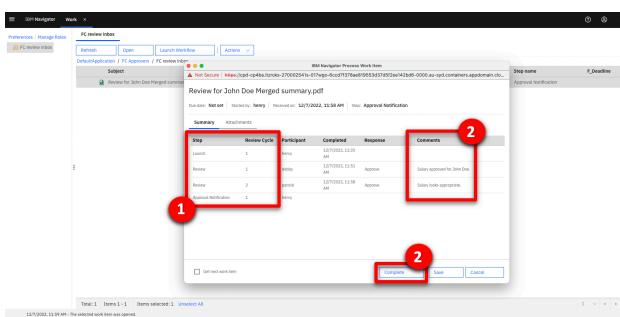
Action 4.2.28

- Click **Open**.



Action 4.2.29

- Point out the sequential steps in the **Summary** tab (1) and the comments in the **Comments** column (2). Click **Complete** (2).



Narration

The HR manager reviews the comments made by the hiring and payroll managers. He does not see any further actions needed from the hiring or payroll managers, so the salary approval workflow is now complete.

The company is ready to send an offer letter to the applicant.

Summary

Today we saw how a company uses IBM's enterprise content management platform to share and manage documents while maintaining security and adhering to regulations.

We used role-based capabilities to secure content by customizing document access. We used redaction to ensure compliance with privacy regulations. We saw how the platform's integrated features, such as annotation, video bookmarking and document merging, helped make the team more productive.

IBM's content management capabilities are used by our customers today to securely manage hundreds of thousands, or in some cases millions, of documents in their organizations.

Thank you for attending today's presentation.