IBM FileNet Content Manager

# FileNet Connector for Salesforce User Guide

*Version 5.8.2*

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## Overview

The IBM FileNet Connector for Salesforce app enables Salesforce users to store their attachments as documents in their organization's FileNet Content Manager, or Business Automation Content Services on Cloud object store instead of storing the documents in Salesforce.

The app works by exposing an IBM Documents list view control in one or more Salesforce pages. The view provides a list of FileNet Content Manager documents that are associated with the Salesforce record. The list view control can be exposed on any Salesforce record type.

When a document is added through this list view, the document is stored in the IBM FileNet Content Manager or Business Automation Content Services object store, and a relationship object is created in FileNet that associates the document with the Salesforce object.

Note, this documentation will refer to the on-premises offering IBM FileNet Content Manager; however, all features and actions also apply to the IBM Business Automation Content Services on Cloud managed cloud offering as well.

## Customizing the User Experience

This document describes the user experience that is available through the app without customization. Note that, starting in the 5.8.2 release, it is possible for a Salesforce administrator to customize the appearance and behavior of the app programmatically, by wrapping the IBM Document list view control with a custom Salesforce Lightning Component that controls it programmatically, or through Salesforce Omniscript based business processes. Some of the customizations that are possible programmatically are:

- Setting the default document class when a new document is created
- Setting defaults for properties when a new document is created
- Hiding some or all of the properties that are shown when a new document is created
- Hiding options on the context menu of the Document list view control
- Exposing an Add document control (only available programmatically) which allows a new document to be uploaded and attached to a Salesforce record, without showing the list of existing documents for the record

If your Salesforce administrator has customized the Salesforce Connector for FileNet in this manner, then you may see different behavior than what is described in this document. For more details on programmatic control of the user experience, see the Salesforce Connector for FileNet Programming Guide.

## Limitations

The IBM FileNet Connector for Salesforce app has the following limitations:

- Minor versions are not exposed. While the FileNet object store allows both major and minor document versions to be created, minor document versions are not visible through the Salesforce app. Only the most recent major version appears in the Salesforce UI. Earlier major versions can be viewed, but not modified.
- No mechanism exists for attaching existing FileNet documents. The app does not currently allow a Salesforce user to query existing FileNet documents from the Salesforce user interface and associate those documents to Salesforce objects. This capability may be added in a future version of the app.
- Deletion is not allowed. While the app allows documents to be disassociated from a Salesforce object, it does not allow the actual document in the FileNet object store to be deleted.
- Not all property datatypes are supported. The app does not allow the ability to view or set binary properties, object valued properties, or multi-valued properties.
- Nested choice lists are not currently supported. If a choice list contains embedded choice groups, those choice groups are hidden when displaying the available values in the choice list.
- The app is not currently supported on mobile devices.
- The app is not supported on Salesforce Classic organizations. Only Salesforce Lightning Experience organizations are supported.

## Configuring credentials in IBM FileNet Connector for Salesforce App

The Salesforce organization administrators can control which users have access to the IBM FileNet Connector for Salesforce app. If your administrator has installed and configured the app, and has added you to the Permission Sets that control your ability to access the app, then you have permissions for the app.

Depending on how the Salesforce administrator has configured the app to authenticate to the FileNet environment, a manual step may be required for users of the app. Check with your administrator to determine the required values for your authentication protocol.

- If the Salesforce Admin has configured the system to connect to the FileNet environment using OAuth, then there is no further step needed by individual users. As long as a user's Salesforce user account is the same as the name that they use to login to the FileNet environment, they have access.
- If the Salesforce Admin has configured the system to connect to the FileNet environment using BasicAuth, then each user must add the Named Credential "IBMFileNetCredential" to their individual profile.

**To configure Basic Auth credentials:**

1. In Salesforce, navigate to your user profile.
2. In the Authentication Settings for External Systems, click the **New** button to add a new Named Credential.
3. Set the External System Definition to **Named Credential**.
4. Set the Named Credential to "IBMFileNetCredential".
5. Configure the authentication protocol:
    a. Set Authentication Protocol to **Password Authentication**.
    b. Enter the username for the IBM FileNet domain in the **User name** field.
    c. Enter the password for the IBM FileNet domain in the **Password** field.

## Setting the Language

The language used by the IBM FileNet Connector for Salesforce app is controlled by the user's Salesforce Language setting. This setting can be updated by using the **Language** dropdown in the Salesforce Language and Timezone settings panel. For more information, see the following topic:
https://help.salesforce.com/articleView?id=admin_language_locale_currency.htm&type=5

The following languages are supported:

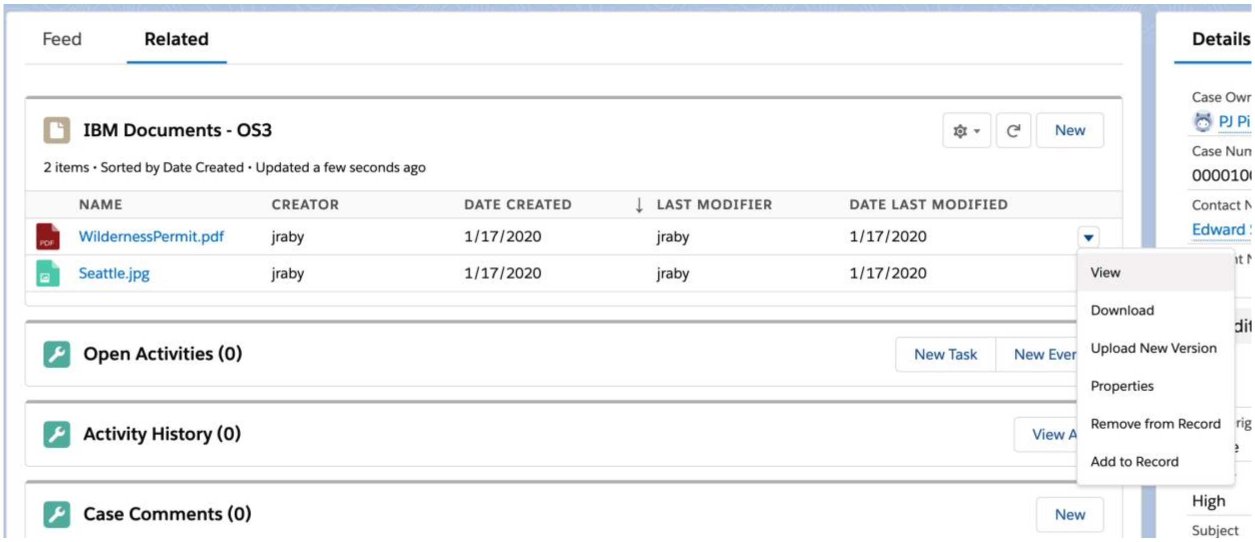
- Arabic: ar
- Bulgarian: bg
- Czech: cs
- Danish: da
- German: de
- Greek: el
- English: en_US
- Spanish: es
- Finnish: fi
- French: fr
- Croation: hr
- Hungarian: hu
- Italian: it
- Hebrew: iw
- Japanese: ja
- Korean: ko
- Dutch: nl_NL
- Norwegian: no
- Polish: pl
- Portuguese (Brazil): pt_BR
- Portugese (European): pt_PT
- Romanian: ro
- Russian: ru
- Slovakian: sk
- Slovenian: sl
- Swedish: sv
- Thai: th
- Turkish: tr

- Vietnamese: vi
- Chinese (Simplified): zh_CN
- Chinese (Traditional): zh_TW

## Viewing IBM FileNet documents that are associated with a Salesforce object

After the app is installed, the Salesforce organization administrator can add the IBM Documents list view to Salesforce pages. In this list, Salesforce users can add new attachments to be stored as FileNet documents, or view and edit existing document attachments.




This list view is typically added to the **Related** tab for the page, but the administrator can add it to any tab of any Salesforce page, including pages for custom Salesforce record types.

Typically, one list view is exposed, reflecting a single FileNet object store that is available for document storage. If Salesforce is integrated with multiple FileNet object stores, however, the administrator can add multiple list view components to these pages.

The name of the component is configurable by the Salesforce Administrator. The default value of the name is “IBM Documents”. If the administrator is adding multiple components (for multiple object stores), then different names should be used for each component.

## Downloading documents

A **Download** menu item can be found in the menu of each listing within IBM Documents. Selecting this option displays the browser’s download dialog, enabling you to select a location for the download and to initiate the process.

## Viewing documents

You can use the **View** menu item for a row in the IBM Documents list view to see the contents of a document. You can also click the hyperlink for the document in the **Name** column.

Note that the only document types that can be viewed directly in the browser are image documents (JPG, PHP, or GIF), text documents (.txt), some video formats, some audio formats, and PDFs. Note however, that not all browsers support viewing PDFs directly. The supported audio/video formats is also browser specific. For all other document types (and for PDFs, if your browser does not support PDF viewing), you are re-directed to your browser's download dialog and can view the document by using the appropriate application in your desktop environment.

Note: There is a known issue that currently prevents viewing documents in the browser when running on a Safari browser. For Safari users, the only option available to view a document is to first download it to your desktop.

## Viewing or downloading previous versions

If you want to view or download an earlier version of the document, you can use the **Properties** menu item to bring up the Edit Properties dialog. The **Versions** tab of this dialog displays the earlier versions of the document. For each document version, you can select the **View** or **Download** menu item to see the document contents.

You can also view the properties of an earlier version from the menu on the **Versions** tab. Note, however, that you cannot modify the values of properties on earlier versions.

## Adding new documents

You can add a new document (or multiple documents) into the FileNet repository as an attachment on a Salesforce object.

## Uploading content

In the IBM Documents list view widget, click **New**. From the dialog, you can use the **Upload Files** button to upload a file from your local system or use the **Drop Files** area to drag and drop files from your local system.

If you upload the wrong file, you can simply upload another file. The second upload replaces the file that was previously uploaded.

### Creating multiple documents with one upload

Note that either method, **Upload Files** or **Drop Files**, enables you to upload multiple files in one operation. If you use this option, you create multiple documents. Each file results in the creation of a separate document.

With this method the information that you specify for the documents, such as document class and property values, are used for all of the created documents. You cannot specify a Document Title in this case. When multiple documents are uploaded at the same time, the file name of each document is used for the Document Title value.

## Choosing a document class

After you upload a file, use the **Document Class** drop-down menu to select the class to use for your new document. The class that you choose should match the type of document that you are uploading, for example, Contract, Receipt, Legal Review, and so on.

The list of classes to choose from are configured for the app by your Salesforce administrator. If there are classes from your object store that you feel should be added, discuss this with your administrator.

## Setting properties for the new document

After you choose a document class, the properties fields associated with the class are displayed. This display is a subset of the properties that exist for the document class on the FileNet object store. System properties that cannot be set are not displayed. Neither are binary properties, object valued properties, multi-valued properties, or read-only properties. The properties that are displayed must be writable, single-valued, custom defined properties of the following data types:

- String
- Integer
- Float
- Date
- Boolean
- Id

However, not all of the eligible properties display. During the object store configuration, the Salesforce administrator chooses which properties to display in the properties dialogs. The administrator can choose to limit the properties that are available in Salesforce. Certain properties get special handling, as discussed in the following sections.

### Value Required properties

If a property is configured as Value Required, then you cannot save the new document unless a value has been supplied for that property.

### Choice lists

If a Choice List is associated with a property, then the dialog displays a drop-down menu of the designated Choice List options. You can select only one of the values on the list.

Choice lists can apply to properties of the String or Integer data types.

### Default property values

If a property has a default value, then the default value will be pre-populated in the entry field for that property. Users can either accept the default value, or override it with another value.

### Minimum and maximum length constraints

Numeric or date properties can have minimum or maximum value constraints. If a property has such a constraint, and a user enters a value outside of the allowed range, then the property value entry field is outlined in red. The document cannot be saved until a value within the legal range is entered.

Likewise, a string property can have a maximum length constraint. If a string that is longer than the configured maximum is entered, then the field is outlined in red until the string is shortened to an allowed length.

## Properties synchronized with Salesforce fields

Your FileNet object store administrator might create special properties to synchronize with Salesforce fields on the Salesforce record where the document is added. If a FileNet property with a symbolic name that beigns with the prefix “Fnsf” is created on the target document class, then the IBM Salesforce Connector for FileNet attempts to find a matching Salesforce field. If a matching field is found, the Connector copies its value to the corresponding FileNet property.

Your administrator might chose to show these synchronized fields on the New Document dialog, or hide them. If they are exposed, the synchronized fields are read-only. Their value is unconditionally set to the value of the corresponding Salesforce field, from the Salesforce record that the document is being added to.

## Updating document properties

To view and edit the properties of a document, select the **Properties** menu item for a row in the IBM Documents list view. Selecting this option brings up the Edit Properties dialog box. You can view the document properties, including System properties, in this dialog box.

You can also use this dialog box to modify the values of the document's properties.

Note that you cannot modify the document's Document class, nor any of the system properties. Additionally, there may be some properties for which the settability has been defined as **Settable only on create** in your FileNet Content Engine server. Properties with this settability are greyed out in the Edit Properties dialog and cannot be modified.

To save your modifications to the documents' properties, click on the **Save** button at the bottom of the dialog. You can use the **Cancel** button to discard your changes without saving.

## Adding a new document version

If you edited an existing IBM document and want to create a new version of the document in the object store, choose **Upload New Version** on the row menu in the IBM Documents list view.

Selecting this option opens the **Upload New Version** dialog box. The behavior of this dialog is similar to that of the New Document dialog box, with the following key differences:

- You cannot specify or change the Document class of the document.
- You cannot upload multiple files at the same time.

## Uploading content

From the dialog, you can use the **Upload File** button to upload a file from your local system, or use the **Drop Files** area to drag and drop a file from your desktop. Note that you can upload only one file at a time from this dialog box.

If you upload the wrong file, you can simply upload another one. The latest upload replaces the file that was previously uploaded.

## Modifying properties for the document

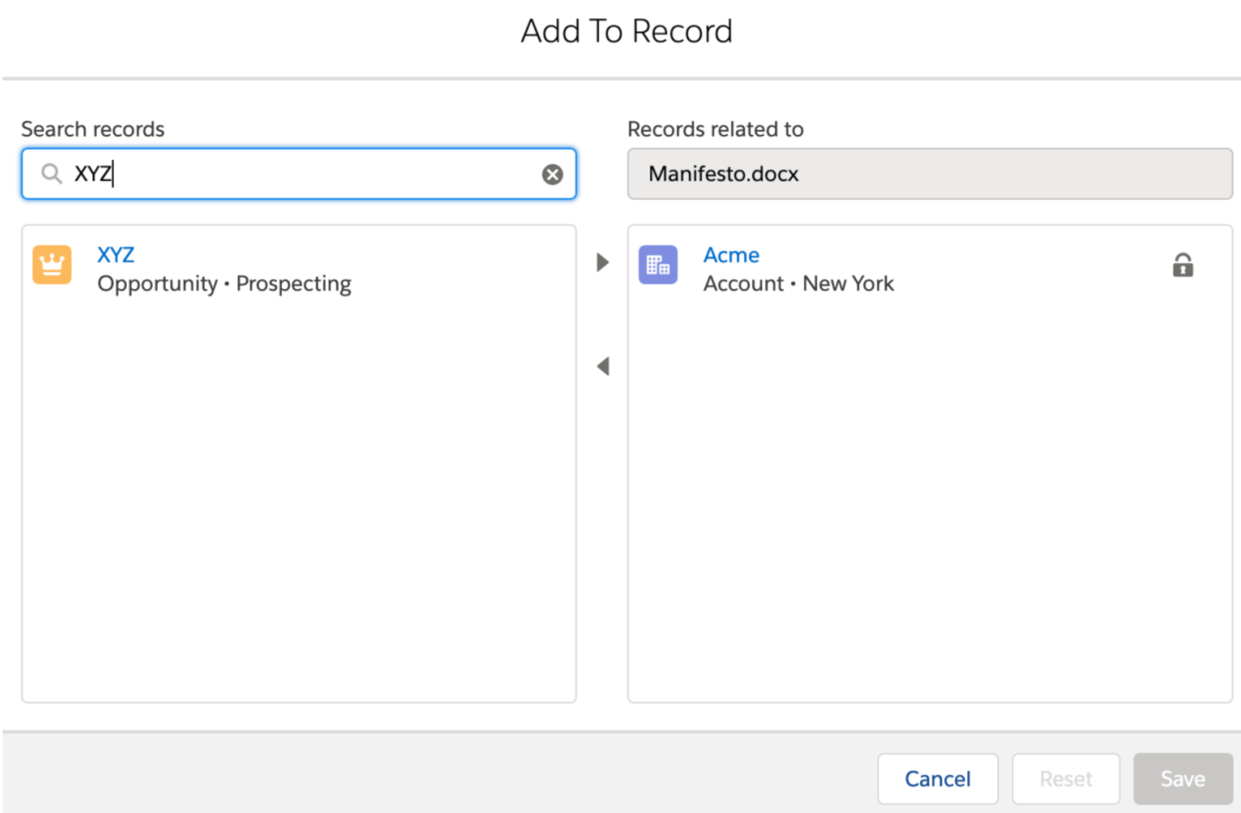
You can edit the values of the document properties as you upload a new version. You cannot edit any of the document's system properties, or any properties for which the settability is **Settable Only On Create**.

You cannot edit the values of the document's properties without uploading new content through this dialog. If you want to edit properties without changing the content, use the **Properties** dialog instead.
To save the new document version, along with any property modifications, click the **Save** button. To discard all changes, click **Cancel**.

## Adding a document association

If you want to associate a document with other Salesforce records, use the **Add to Record** option on the row menu in the IBM Documents list view. This option opens the Add to Record dialog box, where you can search for other Salesforce records of different types. After you enter three or more letters in the Search records field, the dialog automatically searches all record types to find record names that match the search pattern.




The list on the left displays all of the matches that are not currently associated with the record. The list on the right displays all of the records that are currently associated with the document (including documents with names that do not match the search pattern).

The right arrow icon can be used to move entries from the list of records that are not currently associated to the list of records that are assocated with the document. The left arrow icon can be used to move associated records back to the list of records that are not currently associated- disassociating them from the document. Note, however, that you cannot remove the first entry in the associated records list, because that entry is the record from which the “Add to Record” dialog was selected.

None of the changes are permanent until you click **Save** and the new associations are created or deleted. If you click **Cancel**, then no changes are made. Use the **Reset** button to discard all changes and restore the dialog view to the previously existing associations.

By default, this dialog searches for records of the following Salesforce types:

- Account
- Opportunity
- Contract
- Case
- Contact
- Task
- Product
- Order

However, you can specify a filter condition that is scoped by any record type in the Search Records field, and this causes Add To Record to search only for records of this type. To specify the filter condition, you enter the name of the record type, followed by a colon, and then the search string. For example, you can search for Contact records beginning with “Bob” by entering the string “Contact:Bob” in the search field. Note that the name of the Salesforce record type must be entered in English, even if your language is set to something other than English.

By using a search filter that is scoped by a record type, you can search for records of types other than the eight default types listed above, including custom Salesforce record types. For example, if you have a custom record type named “Book” then you can search for Book records whose name begins with “Moby” by entering a search filter of “Book:Moby”.

## Removing a document association

If you want to remove the association between a document in a FileNet object store and a Salesforce object, use the **Remove from Record** option on the row menu in the IBM Documents list view. This option opens the Remove from Record dialog box, which prompts you for confirmation of the removal. If you select **Remove from Record**, then the association between the document and the Salesforce record is deleted. If you select **Cancel**, then the document remains associated.

Note that if you use the **Remove from Record** option, the document still exists in the underlying IBM FileNet Content Engine object store, but it is no longer associated with this Salesforce object. It might be associated with other Salesforce records, or it might not be associated with any record.

It is not possible to permanently delete a document from the object store through the Salesforce interface.

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