Course Exercises Guide

IBM Content Navigator Administration V3.0.6

Course code WF270 / ZF270 ERC 1.0

IBM Training

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Contents

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Exercises description

Exercise objectives

After completing the exercises, students should be able to:

- View, add, modify and search for repository content
- Connect to repositories
- Configure an IBM Content Navigator desktop
- Define cross-repository searches
- Create teamspace templates and teamspaces
- Configure role-based desktop administration
- Customize the desktop appearance
- Modify menus, icons, and labels in the client
- Create viewer maps
- Register a plug-in
- Configure entry template management
- Build and manage entry templates to add documents
- Customize property layouts for entry templates
- Configure and work with role-based redactions
- Configure IBM Navigator Sync services and Sync client
- Work with IBM Content Navigator Edit services
- Configure external share and securely share content with external users

Exercise list

This course includes the following exercises:

- Exercise 1, "Working with repository content"
- Exercise 2, "Configuring an IBM Content Navigator desktop"
- Exercise 3, "Customizing an IBM Content Navigator Desktop"
- Exercise 4, "Configuring Entry Templates"
- Exercise 5, "Configuring and working with role-based redactions"
- Exercise 6, "Configuring and using IBM Navigator Sync"
- Exercise 7, "Configuring and using the Edit Service client"
- Exercise 8, "Configuring and managing external share"

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User IDs and passwords

The following table contains a list of user ID and password information for this course.

Entry point	User ID	Password
Windows Server 2016 operating system	Administrator	FileNet1
WebSphere Application Server (WAS) administration console	wasadmin	FileNet1
FileNet Content Manager repositories administrative user	p8admin	FileNet1
IBM Content Navigator administrative user	p8admin	FileNet1
IBM Content Navigator user	Clara	FileNet1
IBM Content Navigator user	Clark	FileNet1
IBM Content Navigator user	Manny	FileNet1
IBM Content Navigator user	Misty	FileNet1
IBM Content Navigator user	Olivia	FileNet1
IBM Content Navigator external user	extadmin	FileNet1
IBM Content Navigator external user	Elena	FileNet1
IBM Content Navigator external user	Eric	FileNet1

How to use the course exercise instructions

Exercise structure

Each exercise is relatively independent, but it is strongly recommended that you follow the order as presented.

Some exercises include optional sections that you might want to complete when you have sufficient time and want an extra challenge.

Each exercise is divided into sections with a series of numbered steps and lettered substeps:

- The numbered steps (1, 2, 3) represent actions to be done.
- The lettered substeps (a, b, c) provide detailed guidance on how to complete the action.

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Example

Excerpt from Exercise 1

__ 1. Create a folder.

__ a. Click **New Folder** on the toolbar.

__ b. On the **New Folder** page, enter `Sales Docs` in the **Folder Name** field.

In this example, *Create a folder* is the action to be completed. The substeps provide specific guidance on how to create a folder.

Text highlighting in exercises

Different text styles indicate various elements in the exercises.

Words that are highlighted in **bold** represent GUI items that you interact with, such as:

- Menu items
- Field names
- Icons

Words that are highlighted with a `fixed font` include the following items:

- Text that you type or enter as a value
- System messages
- Directory paths
- Code

Values for the data fields

The lab instructions provide values to enter for the data fields. Some of the values are not crucial (for example: Document title) and you can enter different text. Keep in mind that the values are referenced in the subsequent steps. If you opt to enter a different value, use the value that you entered.

Tracking your progress

As shown in the example step, you can see that an underscore precedes each numbered step and lettered substep.

You are encouraged to use these markers to track your progress by checking off each step as you complete it. Tracking your progress in this manner might be useful if you are interrupted while working on an exercise.

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Browser use and other tips

- This course is tested and the screen captures that are included in the Exercises are taken in **Firefox**. Firefox is the default browser. However, **Chrome** is available. Keep in mind, the behavior may be different. If Firefox prompts to install updates, decline the updates.
- To view complete graphic user interface (GUI) on some of the pages, you might have to Zoom out on the browser, to see all the elements.
  From the tool bar, click **View** > **Zoom** > **Zoom Out**
  You can also maximize the browser window.
- The exercises in this course use a set of lab files that can be found in the `C:\Training\WF270G` folder on the Windows platform. The exercises point you to the lab files as you need them.
- After completing the exercise, you are encouraged to go back over all the steps to make sure that you understand why you did each step and how you did it.

Checking for course corrections

Important

Online course material updates might exist for this course. To check for updates, see the Instructor wiki at ibm.biz/CloudEduCourses.

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Exercise 1. Working with repository content

Estimated time

03:15

Overview

In this exercise, you learn how to manage the repository content in IBM Content Navigator.

Objectives

After completing this exercise, you should be able to:

- View repository content
- Add content to a repository
- Search for content in a repository
- Merge and split documents

Introduction

In this exercise, you explore the IBM Content Navigator desktop and the various features that are available to view the content from the repositories. You add folders and documents to the repository and search for documents in the repository based on the properties and content. You also learn about the merge and split capabilities that are available in IBM Content Navigator.

This exercise includes the following sections:

Requirements

The activities in this exercise assume that you have access to the student system that is configured for these activities and all components are running when you begin a section of the exercise.

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User accounts

Type	User ID	Password
Operating system	Administrator	FileNet1
IBM Content Navigator administrator	p8admin	FileNet1
IBM Content Navigator user	Clara	FileNet1
IBM Content Navigator user	Clark	FileNet1
IBM Content Navigator user	Manny	FileNet1
IBM Content Navigator user	Misty	FileNet1
IBM Content Navigator user	Olivia	FileNet1
IBM Content Navigator external user	extadmin	FileNet1
IBM Content Navigator external user	Elena	FileNet1
IBM Content Navigator external user	Eric	FileNet1

Note

- The passwords are case sensitive.
- The exercises in this course use a set of lab files that are stored in the `C:\Training\WF270G\SampleDocs` directory and plug-in files in the IBM Content Navigator installation directory: `C:\IBM\ECMClient\plugins\SamplePlugin.jar`

  The exercises point you to the lab files as you need them.

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Section 1. Prepare your system: Start the components

The environment that is provided with this course requires that you start the IBM WebSphere Application Server that hosts the IBM FileNet P8 Content Manager and IBM Content Navigator components. The WebSphere Admin folder on the desktop includes the scripts that you use to start the components.

For this course, you use a Windows Server 2016 operating system, and the server name is ecmedu01.edu.ibm.com.

Complete the following tasks to ensure that your environment is ready and the services are running before you work on other exercises in the course.

1.1. Log in to the system

If the system is powered off, power the system on.

__ 1. Log in to the operating system by using the following credentials:

- **User name**: `Administrator`
- **Password**: `FileNet1`

1.2. Verify WebSphere Application Server deployment manager

WebSphere Application Server hosts the following applications:

- Content Platform Engine
- IBM Content Navigator
- Administration Console for Content Platform Engine (ACCE)

__ 1. Click the Windows **Services** shortcut on the taskbar.

__ 2. Verify that the **IBM WebSphere Application Server V9.0 - EDUCellManager01** service shows the **Running** status**.**

__ 3. If the service is not already started, start the WebSphere Application Server by right-clicking the service and selecting **Start** and wait for the status to show running.

__ 4. Close the Windows **Services** window.

1.3. Start WebSphere Application Server components

__ 1. Open the **WebSphere Admin** folder on the Windows Desktop.

__ 2. Right-click the **_1 Start node agent.bat** file and select **Run as administrator** and wait for the command prompt to close.

__ 3. Right-click the **_2 Start server1.bat** file and select **Run as administrator** and wait for the command prompt to close.

__ 4. Right-click the **_3 Start ICNserver1.bat** file and select **Run as administrator** and wait for the command prompt to close.

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1.4. Check IBM FileNet P8 platform and IBM Content Navigator

In this section, you verify that all the components that are used in this course for the IBM Content Navigator system are running. The system includes Content Platform Engine and the IBM Content Navigator applications. Because these two applications rely on more software, testing the two applications also ensures that the underlying software is also functioning properly within your system.

__ 1. Open the Firefox browser, click the **Bookmarks** menu, and then click **FileNet P8 System Check** > **CE Ping Page**.

You can also enter the following **URL**: `http://ecmedu01:9080/FileNet/Engine`

__ 2. Verify that the **Content Engine Startup Context (Ping Page)** indicates that Content Platform Engine content services are functioning properly.

This page contains information about the IBM FileNet P8 system such as the product name and version, and log file locations.

__ 3. From the Firefox **Bookmarks** menu, expand **FileNet P8 System Check**, right-click **FileNet P8 CE System Health**, and select **Open in a New Tab**.

You can also enter the following **URL**: `http://ecmedu01:9080/P8CE/Health`

__ 4. Verify that the **IBM FileNet Content Manager - CE System Health** page opens.

The page includes information about FileNet P8 Domain (EDU_P8), object stores, and other resources. Each item has a link to view more details. The green circle shows that these resources are available.

__ 5. In the **Resources** section, click the **Object Stores** link to see a list of available object stores.

You access object stores as repositories in IBM Content Navigator.

__ 6. In the Firefox **Bookmarks** menu, expand **FileNet P8 System Check**, right-click **ICN Ping Page**, and select **Open in a New Tab**.

You can also enter the following **URL**: `http://ecmedu01:9081/navigator/ping.jsp`

__ 7. If you are prompted to log on, enter the following credentials and then click **Log in**.

- **User name:** `p8admin`
- **Password:** `FileNet1`

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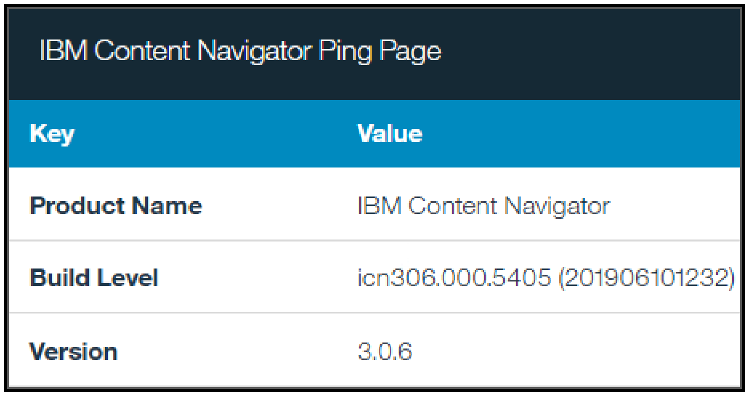
__ 8. Verify that the IBM Content Navigator Ping Page is displayed to indicate that the IBM Content Navigator application is functioning properly.


IBM Content Navigator Ping Page

Key	Value
Product Name	IBM Content Navigator
Build Level	icn306.000.5405 (201906101232)
Version	3.0.6

The page contains information about IBM Content Navigator including the product name and version.

__ 9. From the Firefox **Bookmarks Toolbar**, right-click **Sample Desktop**, and select **Open in a New Tab**.

You can also enter the following **URL**: `http://ecmedu01:9081/navigator/`

__ 10. If you are prompted to log in, enter the following credentials and then click **Log in**.

- **User name**: `p8admin`
- **Password**: `FileNet1`

__ 11. Verify that the IBM Content Navigator Desktop, **Sample Desktop**, opens to the **Browse** view as indicated on the upper left.

This desktop is configured to browse the **Sales** repository by default as indicated on the upper right.

The Browse view opens successfully when the following components are running and communicating within your student system:

- A database system

  Your student system uses the IBM Db2 database software. Every time a user logs in to the desktop, the desktop configuration is loaded from the Db2 database. This step demonstrates that the database is functional.

- An LDAP directory service to handle user authentication.

  Your student system uses Active Directory.

__ 12. Leave **IBM Content Navigator** for the next section.

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Troubleshooting

If any of the clients are not coming up, do the following steps:

__ 1. In Windows **Services**, check that the **IBM WebSphere Application Server V9.0 - EDUCellManager01** service are running.

Then, stop and start the components using the following steps.

__ 2. Open the **WebSphere Admin** folder on the Windows Desktop.

__ 3. Right-click the **_4 Stop ICNserver.bat** file and select **Run as administrator** and wait for the command prompt to close.

__ 4. Right-click the **_5 Stop server1.bat** file and select **Run as administrator** and wait for the command prompt to close.

__ 5. Right-click the **_6 Stop node agent.bat** file and select **Run as administrator** and wait for the command prompt to close.

__ 6. Right-click the **_1 Start node agent.bat** file and select **Run as administrator** and wait for the command prompt to close.

__ 7. Right-click the **_2 Start server1.bat** file and select **Run as administrator** and wait for the command prompt to close.

__ 8. Right-click the **_3 Start ICNserver1.bat** file and select **Run as administrator** and wait for the command prompt to close.

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Section 2. View repository content

In this section, you explore the IBM Content Navigator interface and browse to the repository folders. You also view document properties and content, create annotations to the documents, and add the documents to Favorites.

Note

If you have the IBM Content Navigator desktop open from the previous section, skip to **2.2**.

2.1. Log in to the IBM Content Navigator desktop

__ 1. Start the IBM Content Navigator Sample Desktop.

__ a. Open the Firefox browser and from **Bookmarks Toolbar**, click the **Sample Desktop** shortcut. Or go to the **URL**:
`http://ecmedu01:9081/navigator/?desktop=SampleDesktop`

__ b. Log in to IBM Content Navigator:

- **User name**: `p8admin`
- **Password**: `FileNet1`

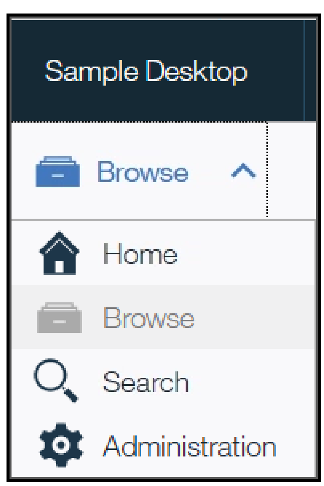
The IBM Content Navigator Desktop: **Sample Desktop** opens to the **Browse** view as indicated on the upper left.

This desktop is configured to browse the **Sales** repository by default as indicated on the upper right. When you configure a desktop, you can choose which repository is to be used as the default.

2.2. Explore the IBM Content Navigator desktop

__ 1. Click the down arrow next to **Browse** to see the features available for this desktop: **Home, Browse, Search, and Administration**.

When you sign in as an administrative user, you have access to the **Administration** view.



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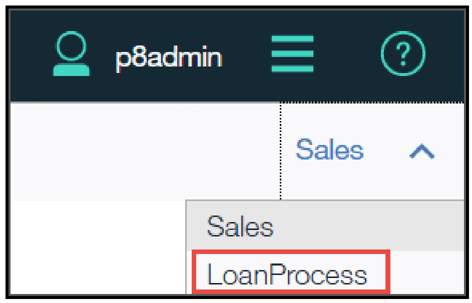
Note

The list shows features that are configured for the desktop. Throughout this course, you use the Home, Browse, Search, and Administration features. You also add more features to the desktop.

__ 2. To select a different repository, click the down arrow next to **Sales** on the upper right.

__ 3. Select **LoanProcess** from the list to open it.



2.3. Browse repositories

The **p8admin** user has access to multiple repositories. You opened the **LoanProcess** repository in the **Browse** view in the previous section. The **LoanProcess** repository is expanded and the available folders are listed.

__ 1. Inspect the contents in the **LoanProcess** repository.

__ a. On the left pane, select **Loans**.

The folder contents are shown in the middle pane.

__ b. Select the document titled **Jay Jones Loan** by single-clicking the document title.

Hint

Single-click the document to view the properties. A double-click opens the document in the Viewer.

__ c. IBM Content Navigator provides a **thumbnail view** of the document on the upper right pane.

__ d. Review the information that is shown in the **Properties** section on the lower right pane.

- The document class is **Loan**
- It includes many custom properties that are specific to loan documents, such as Loan Amount, Loan Term, Loan Number, Down Payment, and Customer Name.

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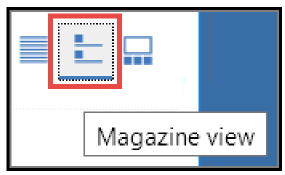
2.4. Select a view

You can select different views to view lists of documents and folders. You are logged in to IBM Content Navigator. **Jay Jones Loan** document is selected in the **LoanProcess** repository > **Loans** folder.

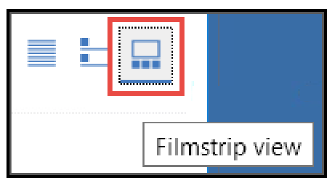
The default for viewing the content list is the **Detailed view**.

__ 1. To explore other views, click the corresponding icon on the upper-right corner and observe how the documents are listed.

- **Magazine view**



- **Filmstrip view**



__ 2. Switch back to the **Detailed view**.

2.5. Inspect document properties

You can get more details about the documents from the **Properties** page.

__ 1. Open the **Properties** page.

__ a. Right-click the **Jay Jones Loan** document.

__ b. Select **Properties** from the list.

The Properties page opens to the **Properties** tab by default.

__ 2. Inspect the property values for this document.

__ a. Verify that the property values are editable by attempting to change the **Loan Amount** value.

p8admin has permission to edit the custom properties of this document. If a user has read-only permissions, then the properties are not editable.

__ b. Scroll down and expand the **System Properties** section at the end of the page.

System properties are read-only.

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__ 3. Click the **Security** tab and verify that **p8admin** is an owner.

__ 4. Notice the other users assigned to this document, such as **Loan officers**.

__ 5. Click the **Versions** tab and check that the document has only one version.

__ 6. Click the **Folders Filed In** tab and observe that this document is filed in only one folder.

A document can be filed in more than one folder.

__ 7. Click the **Parent Documents** tab and notice that this document does not have a parent document.

__ 8. Click the **Content Elements** tab and observe that this document has one content element.

__ 9. Click **Cancel** to close the **Properties** page.

__ 10. Leave the **Browse** view open for the next section.

2.6. View document content

The IBM Content Navigator Viewer provides many tools that you can use to change how you view the document, including rotating, flipping, reversing, and splitting the views on the screen.

__ 1. If you are not already logged in, log in to IBM Content Navigator:

- **URL**: `http://ecmedu01:9080/navigator/?desktop=SampleDesktop`
- **User name**: `p8admin`
- **Password**: `FileNet1`

__ 2. Open Jay Jones Loan document.

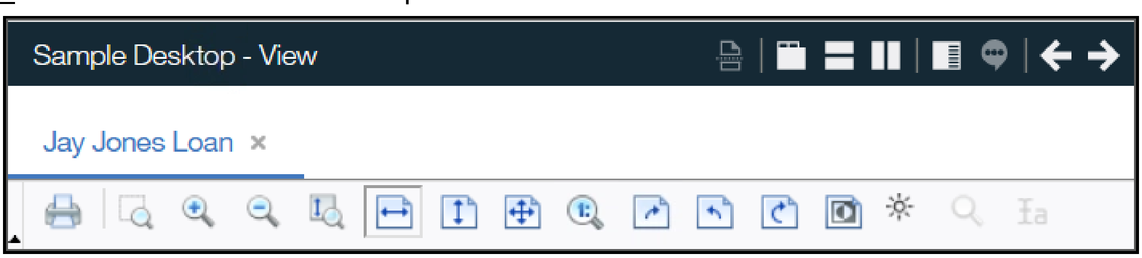
__ a. Open the **LoanProcess** repository > **Loans** folder.

__ b. Select **Jay Jones Loan** and click **Actions** > **Open** (or double-click the document).

The document opens in the Viewer.

__ 3. Explore the Viewer controls to zoom, rotate, and invert the image.

__ a. Use the controls at the top toolbar.



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__ b. If the controls are not visible, click the down-arrow at the top.

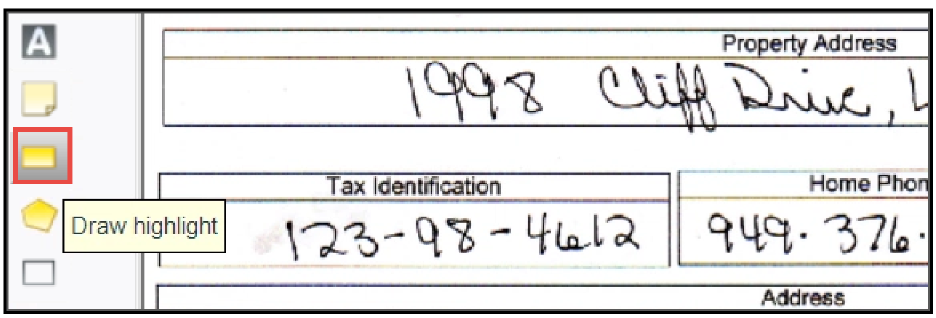
__ 4. Return the image to its original view.

__ 5. Leave the Viewer open for the next section.

2.7. Create annotations

The Viewer provides tools for adding annotations to a document. If you have Author access to the document, you can save the annotations.

__ 1. Use the **Draw highlight** annotator from the left pane to highlight the **Down Payment** amount.



__ 2. Hover the cursor over the highlighted area to verify that the annotation shows the metadata (Values for **Create By** and **Created On**).

__ 3. Delete the annotation.

__ a. Right-click the highlighted area.

New controls open.

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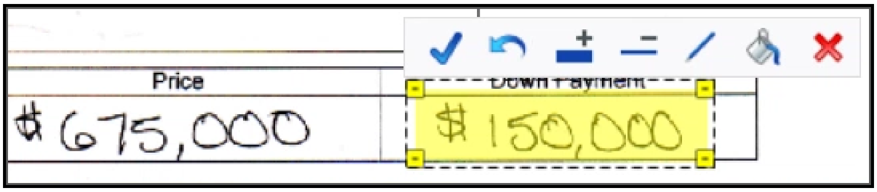
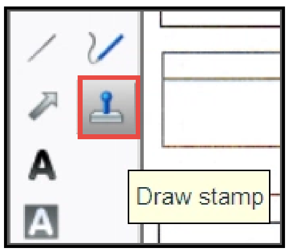
__ b. Click the **red X** icon.

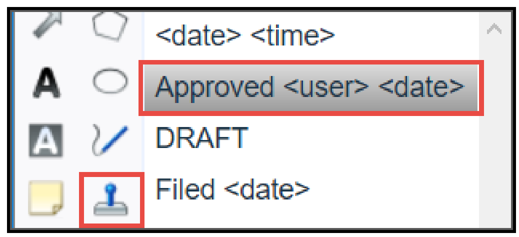


__ 4. Add a stamp that shows that the document was approved.

__ a. Click the **Draw stamp** icon.

__ b. Select **Approved <user><date>** from the list.

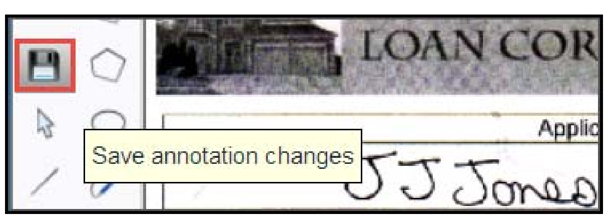




__ c. Click the open space at the top of the document, just to the right of the word **LoanID**.

The stamp includes your user name and the date.

__ 5. Click the **Save** icon to save your annotation changes.



__ 6. Click the **View Properties** icon to view the image and properties at the same time.

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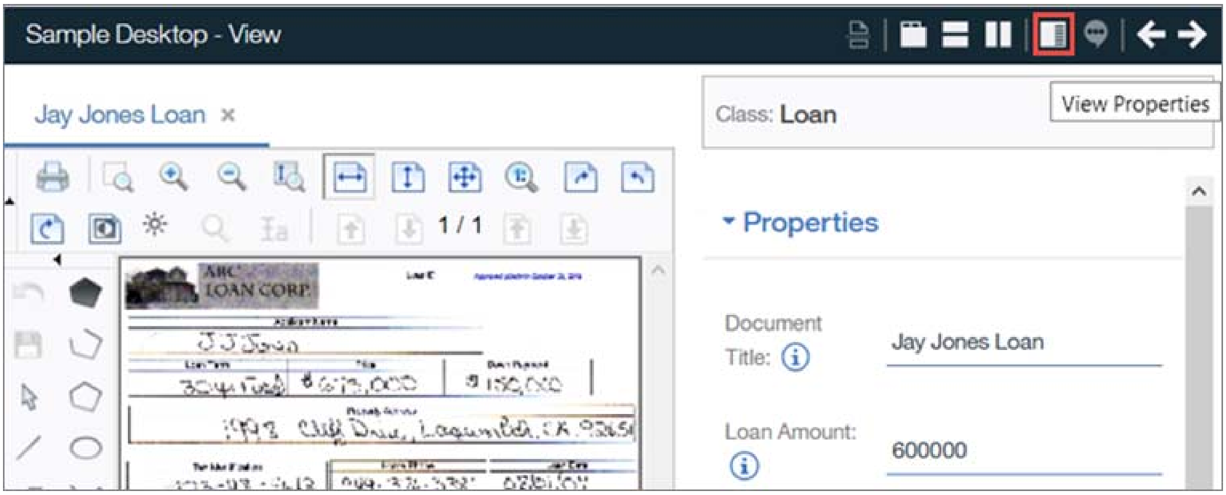

__ 7. From the viewer page, observe that you can edit custom properties in the **Properties** section and save changes.

Note

You can also get the next document to work on by selecting the **Save then get next** option at the end of the Viewer page.

__ 8. Leave the document open in the **Viewer** for the next activity.

2.8. Compare two documents side by side

__ 1. Without closing the Viewer window where you created annotations, go back to the **Browse** view.

__ 2. Open a second document.

__ a. From the **LoanProcess** repository > **Loans** folder, select **George Green Loan** document.

__ b. Click **Actions** > **Open**.

The document is opened in the same Viewer window as the other document but in a second tab.

__ 3. To view the documents side by side, click the **Split panes left and right** icon in the upper right corner of the Viewer.

__ 4. Use the Side arrows to switch between the documents or you can click the tab of the document.

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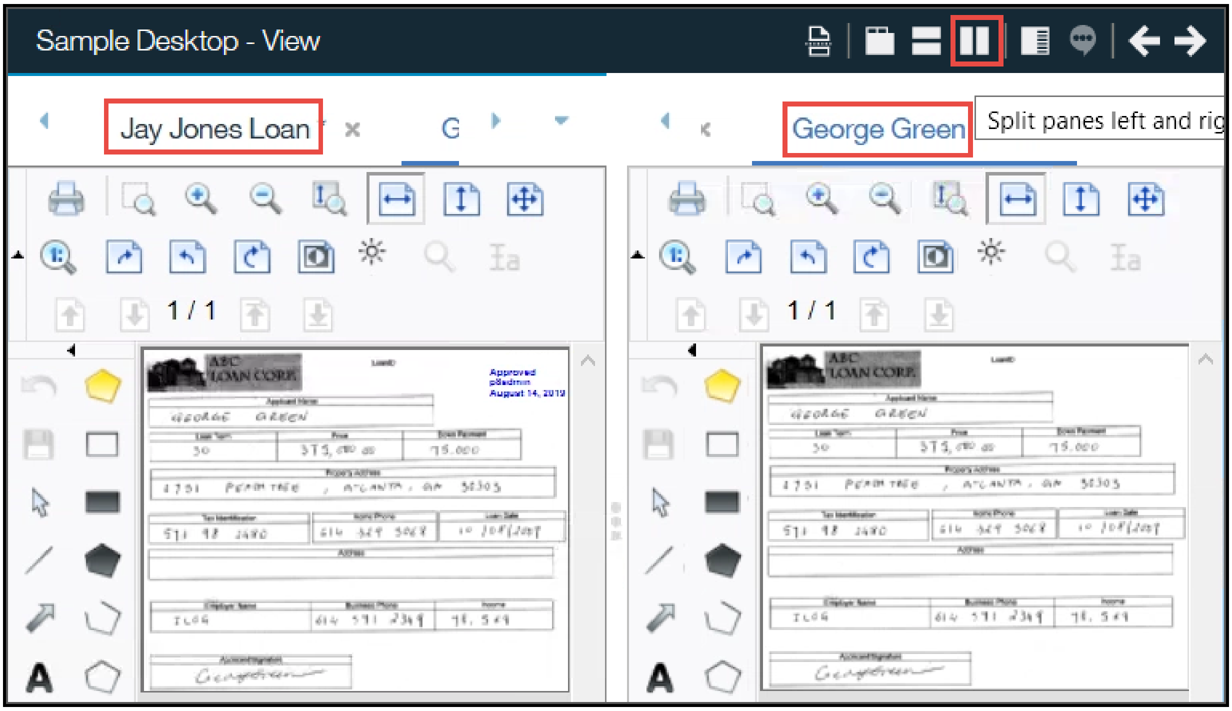


__ 5. Observe that each document can be viewed in either tab, or in both.

__ 6. Click the **Split panes top and bottom** icon  to align the documents in two rows.

__ 7. Close the Viewer but leave the IBM Navigator desktop open.

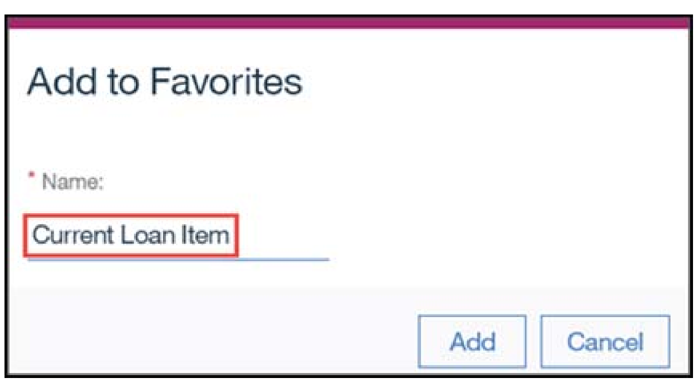
2.9. Add to Favorites

You can add folders and documents to Favorites in IBM Content Navigator, so that you can find them quickly for later use.

You are logged in to the IBM Navigator desktop and the **Loans** folder is open in the **LoanProcess** repository.

__ 1. Select (single-click) the **Carol Cook Loan** document and click **Actions** > **Add to Favorites**.

__ 2. In the **Add to Favorites** dialog box, change the name to **Current Loan Item**.



__ 3. Click **Add**.

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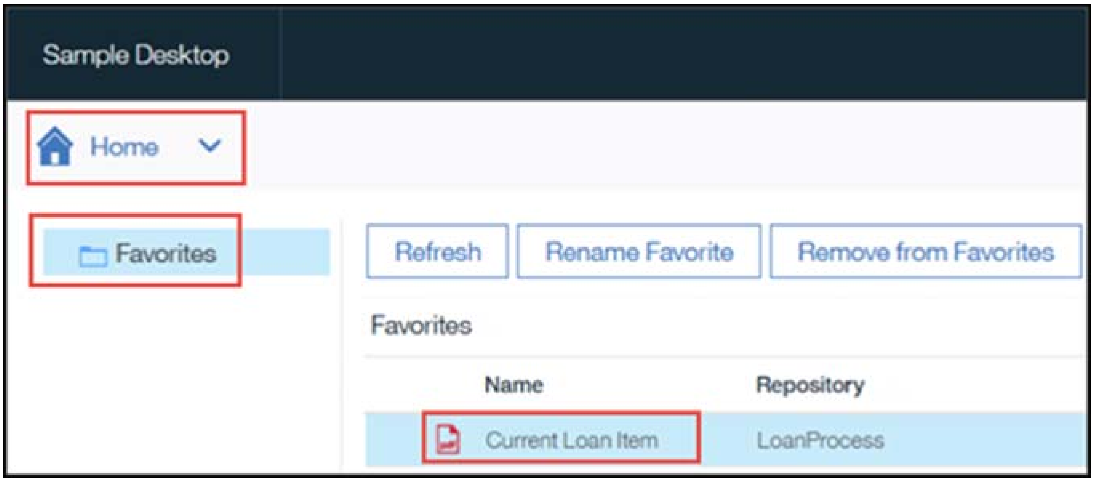
__ 4. Verify that the document is added to the **Favorites**.

__ a. Click the down arrow next to **Browse** on the upper left, and select **Home**.



__ b. Double-click **Current Loan Item** and verify that it opens up the **Carol Cook Loan** document.

__ c. Close the Viewer and leave IBM Content Navigator open for the next section.

2.10. View video files

IBM Content Navigator supports viewing video files.

You are logged in and the **LoanProcess** repository is selected.

__ 1. To switch to the **Browse** view, click the down arrow next to **Home** and select **Browse**.

__ 2. From the left pane, select the **LoanProcess** > **Videos** folder.

__ 3. Right-click **Sample_Video.mp4** and select **Preview.**

__ 4. Verify that the video file opens in the viewer.

__ 5. Click the **Play Video** button to view the video.

The sound is disabled on the student system.

__ 6. Close the video viewer.

2.11. View documents with multiple content elements

You can include several files (as content elements) into one document in a FileNet Content Manager repository and then view these content elements in IBM Content Navigator. In this section, you examine a multi-content document and view the elements.

You are logged in and the **LoanProcess** repository is selected.

__ 1. From the left pane, select the **Sample Docs** folder.

__ 2. From the middle pane, right-click **Multi Content Doc** and select **Properties** from the list.

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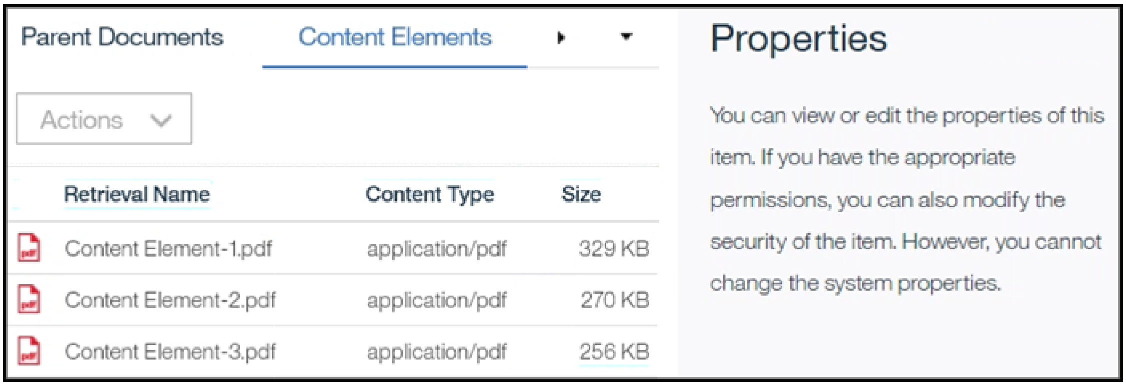
__ 3. On the tab bar of the **Properties** page, navigate to the right and click the **Content Elements** tab.

You can also use the down arrow and select the tab.

__ 4. Verify that this document has three content elements.

Three separate PDF files are included in this document.



__ 5. Double-click **Content Element-1.pdf** to open it in the **Viewer.**

__ a. If you are prompted with the message that `Firefox prevented this site from opening a pop-up window`, click **Options** on the banner and then select **Allow pop-ups for ecmedu01**

__ 6. Notice that it is a one page document and the value **1/1** is shown on the toolbar.

__ 7. Close the Viewer.

__ 8. Optionally, you can open the other two content elements in the Viewer and check their contents.

__ 9. On the **Properties** page, click **Cancel** to close the page.

__ 10. Back on the **Browse** view, double-click **Multi Content Doc** to open it in the Viewer.

__ 11. In the Viewer, verify that the first page is opened as indicated on the toolbar: **1/3**

This page is the first content element for the document.

__ 12. Scroll down to see the other two content elements as page 2 and 3 and verify that all the content elements of the document are opened together.

__ 13. Close the Viewer.

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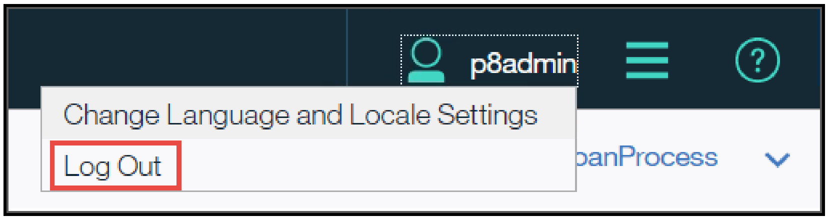
__ 14. Log out of **IBM Content Navigator**.

__ a. Click the user name (the head and shoulder icon) on the banner and click **Log Out**.



__ b. When you are prompted, click **Log out**.

__ c. Close the browser.

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Section 3. Add content to a repository

In this section, you add folders and documents to a repository, check out and check in documents, and verify the document versions.

3.1. Create folders

In this section, you add two folders and practice editing security on the folders.

__ 1. Log in to the IBM Content Navigator Sample Desktop:

- **URL**: `http://ecmedu01:9080/navigator/?desktop=SampleDesktop`
- **User name**: `p8admin`
- **Password**: `FileNet1`

The desktop opens in **Browse** view with the **Sales** repository as the default.

__ 2. Create a folder.

__ a. Click **New Folder** on the toolbar.

__ b. On the **New Folder** page, enter `Sales Docs` in the **Folder Name** field.

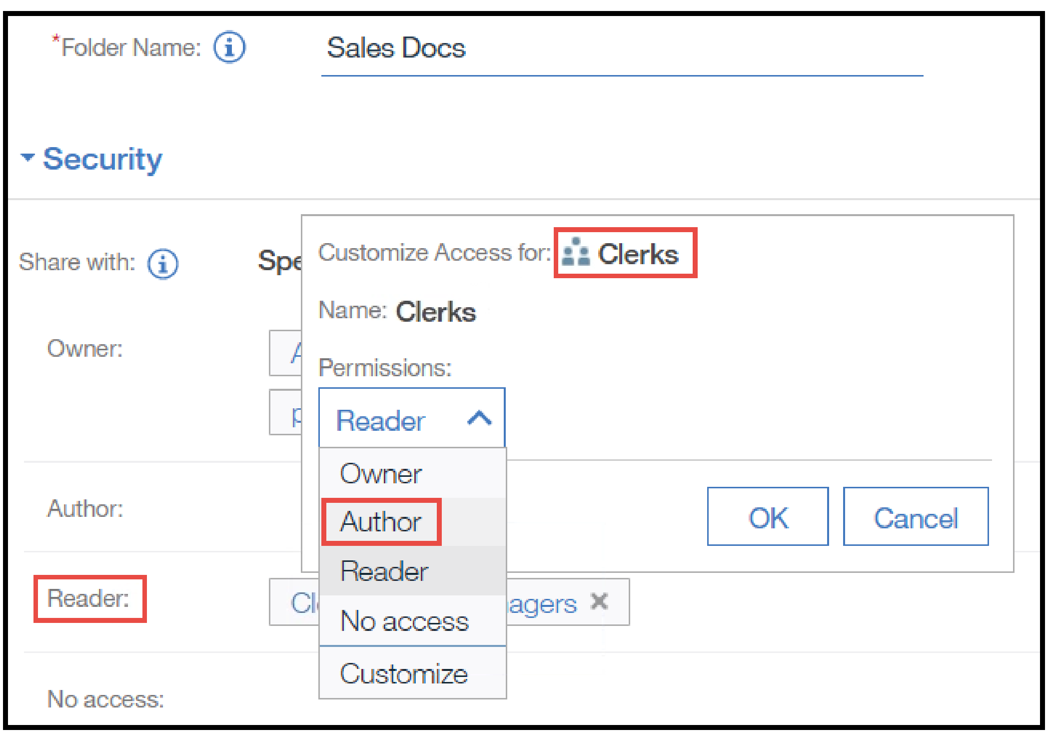
In the following steps, you specify folder security.

__ 3. Update the security access for the Clerks group on the new folder.

__ a. If it is not already expanded, expand the **Security** area.

__ b. In the **Reader** field, click the **Clerks** link.

__ c. From the dialog box, click the down arrow near **Reader** and select **Author** from the list.



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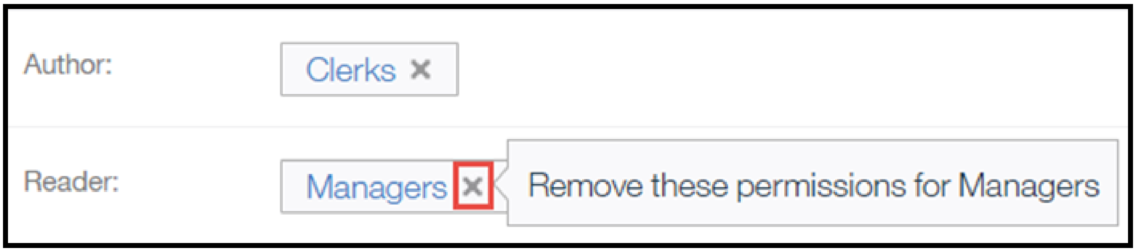
__ d. Click **OK** and then verify that **Clerks** is listed for the **Author** field.

__ 4. Remove security groups for the new folder.

__ a. In the **Reader** field, click **X** to remove **Managers**.



__ b. In the **Owner** field, click **X** to remove **p8users**.

__ c. When you are prompted for a confirmation, click **Delete**.

__ 5. Add a user for the new folder.

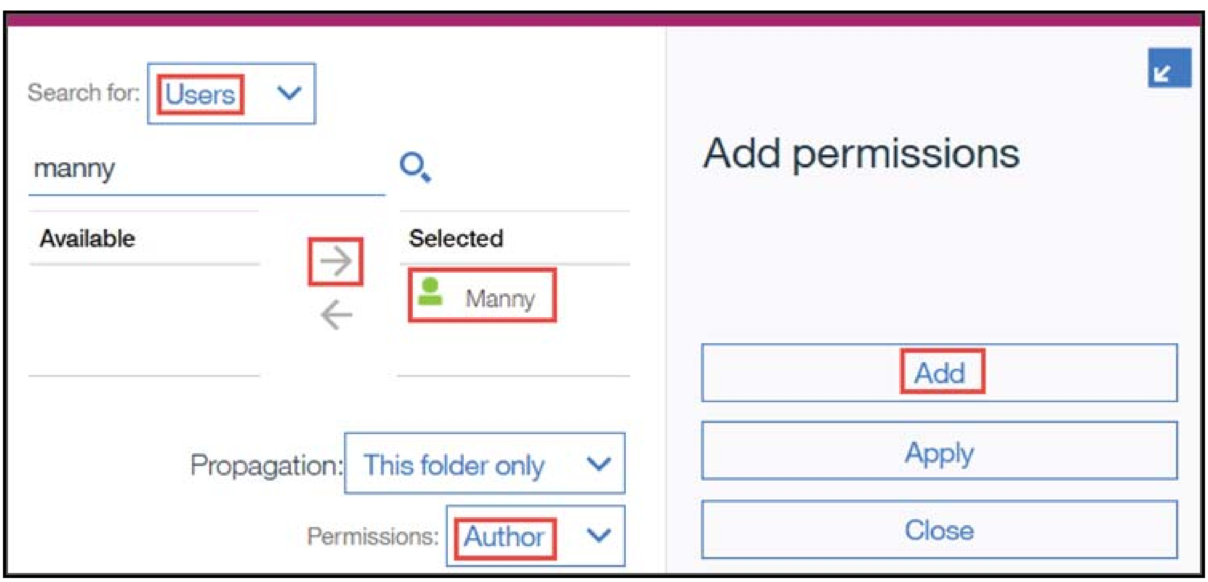
__ a. In the **Share with: Specific users and groups** field click **Select**.

__ b. On the **Add permissions** page, select **Users** from the **Search for** list.

__ c. In the **Search** field, type `Manny` and click **Search** (the magnifying icon).

__ d. Select **Manny** from the **Available** pane and click the forward arrow to add it to the **Selected** pane.

__ e. Scroll down to the end of the page and for the **Permissions** field, select **Author** from the list.



__ f. Click **Add**.

__ 6. On the **New Folder** page, verify that **Manny** is now listed in the **Author** field.

__ 7. Click **Add** to create the folder.

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__ 8. On the **Browse** view, verify that your new folder (**Sales Docs**) is listed.

__ 9. Create a second folder that is named Public.

__ a. Click **New Folder** and name the folder `Public`.

__ 10. In the **Security** area, update **Clerks** security to **Author**.

__ 11. Change Managers security.

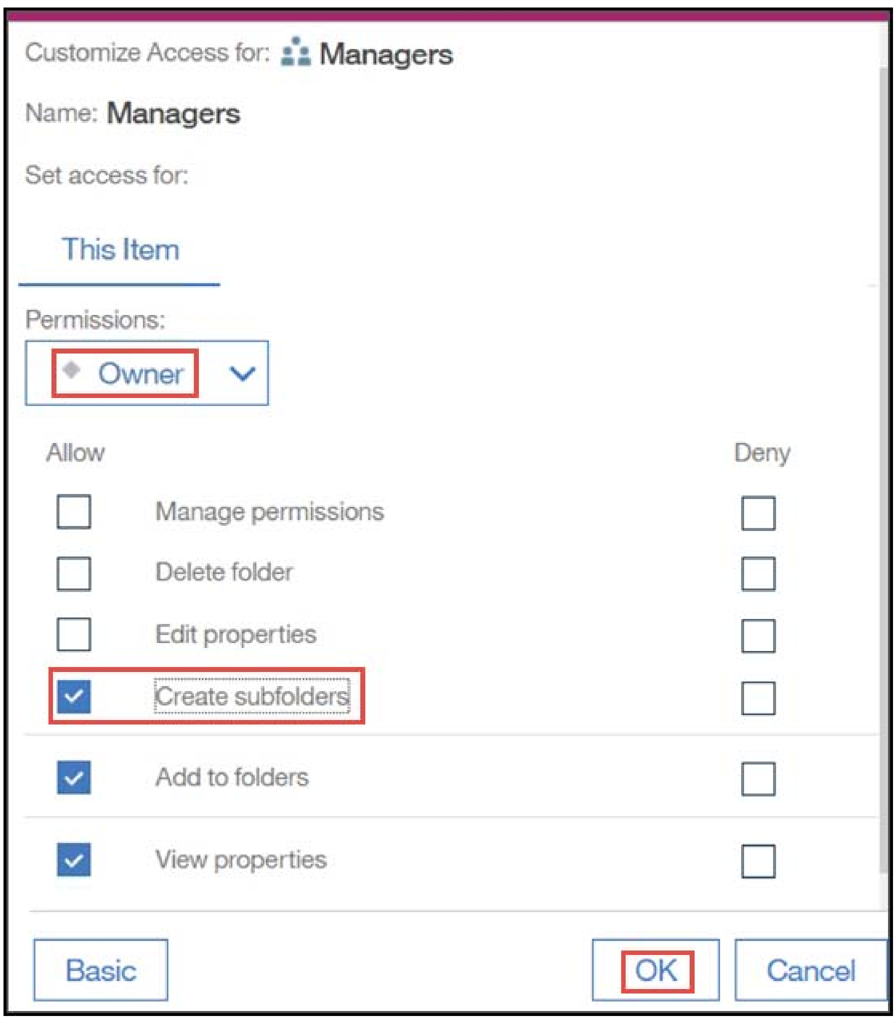
__ a. From the **Reader** field, click the **Managers** link.

__ b. Click **Reader** and select **Customize.**

__ c. On the customize window > **This Item** tab, select **Author** from the **Permissions** list.

__ d. Click **Advanced**.

__ e. Select the **Allow** option for **Create subfolders** and verify that the **Permissions** is changed to **Owners**.



__ f. Click **OK**.

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__ 12. Notice that **Managers** are moved from Readers to **Owners**.

Because you customized the security, it is indicated by a diamond icon to indicate the default security is changed.

__ 13. Click **Add**.

__ 14. Back on the **Browse** view, verify that your new folder (**Public**) is listed.

__ 15. Leave IBM Content Navigator open for the next section.

3.2. Add a document to a repository

You can add documents to the folder that you recently created.

__ 1. Click the **Sales Docs** folder in the left pane to open it.

__ 2. Add a document to the folder.

__ a. Click **Add Document** on the toolbar.

__ b. On the **Add Document** page, verify that **Local Document** is selected for the **What do you want to save?** field.

__ c. Click **Browse** and navigate to **C:\Training\WF270G\SampleDocs** folder.

__ d. Select any document (Example: **MarketingPlan1.pdf**) and click **Open**.

__ 3. Select Class and set property values for the new document.

__ a. For the **Class** field, select **Product** from the list and click **OK**.

__ b. The **Document Title** property automatically takes the value of the file name. Edit the title to: **Marketing Plan 1**.

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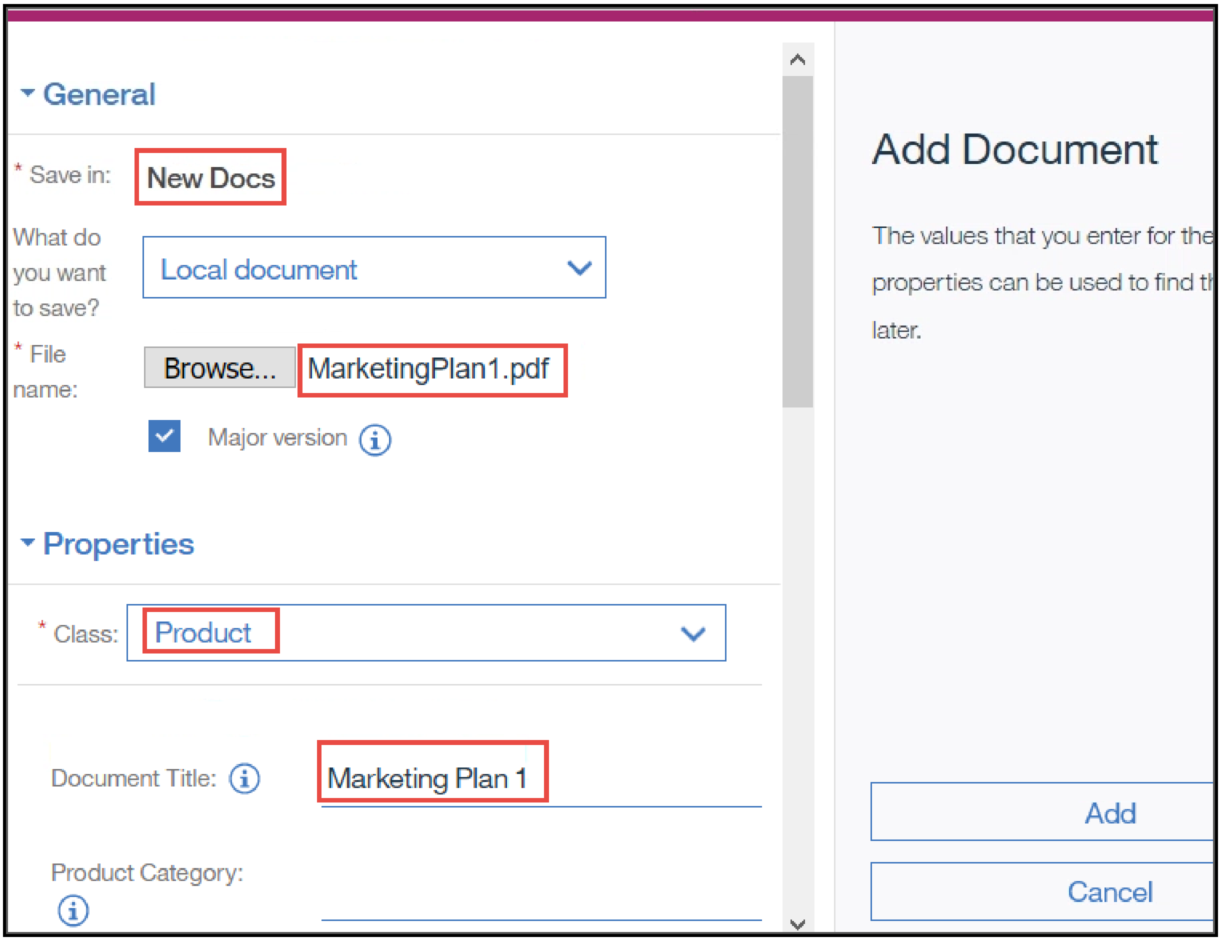
__ c. Notice that properties such as **Product Category** are available for this document class.



__ d. Set **Product Category** to **Deluxe**.

__ e. For **Product ID,** enter **PDT185**.

The values that you enter are not important. Since the values are not marked as required, you can also leave blank for the properties.

__ 4. Modify the document security for **Clerks** and **Managers** to **Author**.

The steps to modify the document security are similar to the steps for the folder security as shown in the previous section.

__ a. Edit the security for **Clerks** and **Managers** to **Author**.

__ 5. Click **Add**.

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__ 6. Back on the **Browse** view, verify that your new document (**Marketing Plan 1**) is listed in the **Sales Docs** folder.

__ 7. Select (single-click) the document.

__ a. Verify that a thumbnail of the document (on the upper right pane) and the **Properties** pane (on the lower right pane) are shown.

If they are not visible, click the three dots to expand the Properties section.

__ 8. Leave IBM Content Navigator open for the next section.

3.3. Add a link to an external document

In this section, you add a link for an external document to the folder that you created in the repository. The content for the external document is stored outside the repository. You create a reference to the content.

The **Sales Docs** folder is open.

__ 1. Add a document to this folder.

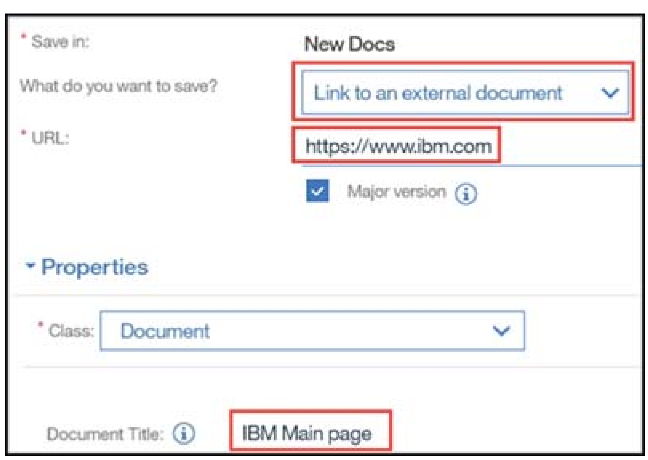
__ a. Click **Add Document** from the toolbar.

__ b. On the **Add Document** page, in the **What do you want to save** field, select **Link to an external document** from the list.

__ c. For the **URL** field, enter the location of the external document. Example: `https://www.ibm.com`

The Document Title property automatically takes the URL value.

__ d. Edit the title. (Example: `IBM Main` page).



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__ e. Click **Add**.

__ 2. Back on the **Browse** view, verify that your new document is listed in the **Sales Docs** folder.

__ a. Double-click the **IBM Main page** document and the web page that you specified opens in browser tab.

In the Firefox browser, if you get a message that it prevented a pop-up window, click **Options** and select **Allow pop-ups for ecmedu01**.

__ b. Close the browser tab

__ 3. Leave IBM Content Navigator open for the next section.

3.4. Add or edit multiple documents at the same time

You can add one or more documents to a folder by dragging them into IBM Content Navigator.

In to IBM Content Navigator **Browse** view, the **Sales** repository and the **Sales Docs** folder are open.

__ 1. Add documents to the folder.

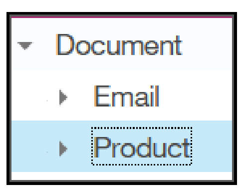
__ a. In **Windows Explorer**, go to **C:\Training\WF270G\SampleDocs** in your local directory.

__ b. Select three documents that start with the name: **Testfile**

__ c. Drag them into the middle pane of the IBM Content Navigator (where the documents are listed).

The **Add Documents** wizard opens.

__ d. In the **Properties** section, for the **Class** field, select **Product** from the list.



__ e. Click **OK** and then click **Add**.

__ 2. Back on the **Browse** view, verify that the new documents are listed in the **Sales Docs** folder. The system uses the file name as the title.

__ 3. Optional: Edit the properties for the documents.

__ a. Select several documents (that you just added) by pressing Shift and click.

__ b. Right-click and select **Properties** from the list.

__ c. On the **Properties** page, for the **Product Category** field, select **Basic** from the choice list.

__ d. Enter a description (example: `New products`) in the **Product Description** field.

__ e. Click **Save**.

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__ 4. Verify that the properties are updated for all the documents that you selected.

__ a. Select a document and view the property values on the right pane under the **Properties** section.

__ 5. Leave IBM Content Navigator open for the next section.

3.5. File a document

In this section, you file a document from the Sales Docs folder to the Public folder. A single document can be filed in multiple folders within a repository.

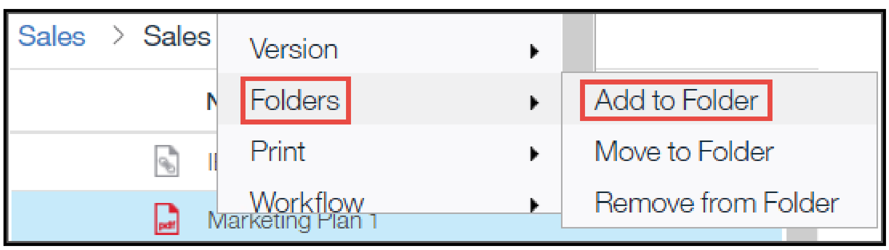
You are logged in to IBM Content Navigator **Sample Desktop**.

__ 1. On the **Browse** view, go to the **Sales** > **Sales Docs** folder.

__ 2. Right-click **Marketing Plan 1**.

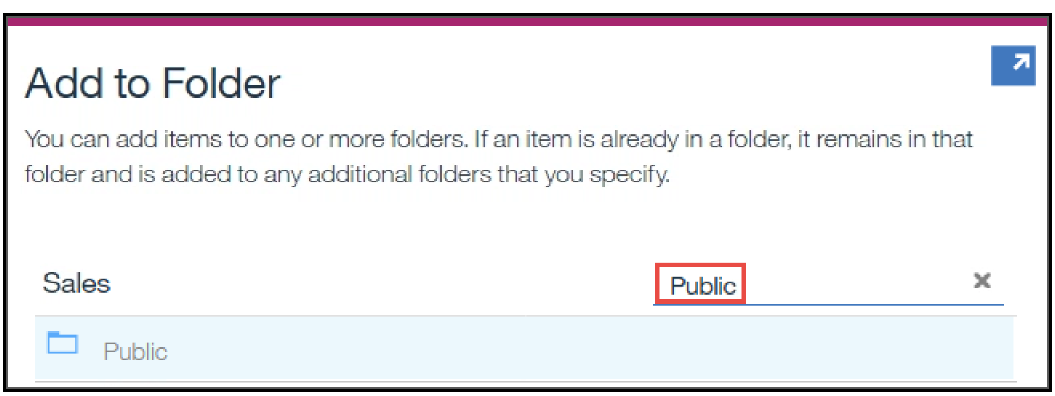
This the document that you added in a previous section.

__ 3. Select **Folders** > **Add to Folder** from the list.



__ 4. On the **Add to Folder** dialog box, type `Public` on the **filter** field, and then select the **Public** folder.

If the list of folders is not visible, expand the window.



__ 5. Click **Add** to close the window.

__ 6. Open the **Public** folder to verify that the **Marketing Plan 1** document is now filed in two folders.

__ 7. Leave the **Public** folder open for the next section.

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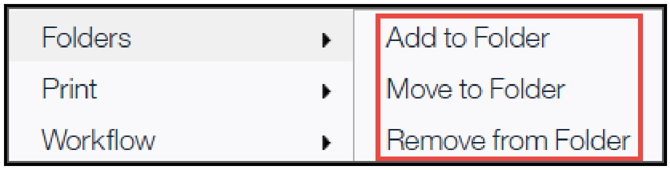
Note

Other folder options include moving to and removing from the folder.



- If you **move** a document from one folder to another, then the document is no longer filed in the original folder.
- If a document is removed from all folders, it continues to exist as an unfiled document that can be found by using Search tools.

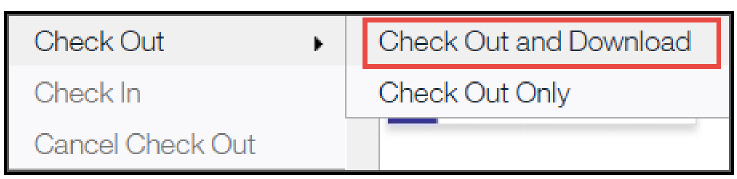
3.6. Check out a document

When you are working on a document, you can check it out so that other users cannot edit it. Note that IBM Content Navigator also supports collaborative editing.

You are logged in to IBM Content Navigator **Sample Desktop**.

__ 1. In the **Sales** > **Public** folder, select the **Marketing Plan 1** document that you filed in this folder.

__ 2. Click **Actions** > **Check Out** > **Check Out and Download**.

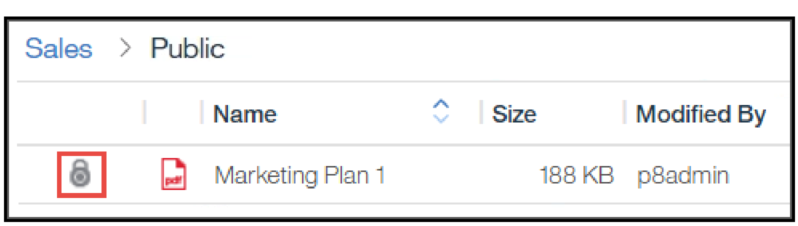


__ 3. On the dialog box, select the **Save File** option and click **OK**.

By default, the Firefox browser saves the file in the **Downloads** directory on the local system.

__ 4. On the **Browse** view of IBM Content Navigator, verify that the document has a lock icon to indicate that the document is checked out.

__ a. If the lock icon is not shown, click **Refresh** on the toolbar.



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__ 5. Log out of IBM Content Navigator.

3.7. Verify the checked out status for a document

The user p8admin checked out the document in the Public folder and so p8admin can only edit it. In this section, you log in as a different user and check if the document is available for checkout and editing.

__ 1. Log on to IBM Content Navigator as Manny:

- **URL**: `http://ecmedu01:9080/navigator/?desktop=SampleDesktop`
- **User name**: `Manny`
- **Password**: `FileNet1`

__ 2. On the **Browse** view, open the **Sales** > **Public** folder.

__ 3. Verify that you can see the document that you added, and it is checked out with a lock icon.

__ 4. Select the document and click **Actions**.

__ 5. Verify that the **Check Out** action is not enabled.

__ 6. Log out of IBM Content Navigator.

3.8. Check in a document

You checked out a document in a previous section. When you check the document back in, a new version of the document is created in the repository.

__ 1. Log in to IBM Content Navigator.

- **URL**: `http://ecmedu01:9080/navigator/?desktop=SampleDesktop`
- **User name**: `p8admin`
- **Password**: `FileNet1`

__ 2. In the **Sales** > **Public** folder, select the **Marketing Plan 1** document and click **Actions** > **Check In**.

__ 3. On the **Check In** page, click **Browse** and on the **File Upload** page, navigate to the document that you checked out.

If you saved it in the default location, it is in the **Downloads** folder.

Typically, you edit the document and then check in. For this section, editing is not required.

__ 4. Select the **MarketingPlan1.pdf** document and click **Open**.

__ 5. On the **Check In** page, click **Check In** on the lower right of the page.

__ 6. On the **Browse** view, verify that the **lock** icon is gone. The document is checked in.

__ 7. Leave the **Public** folder open for the next section.

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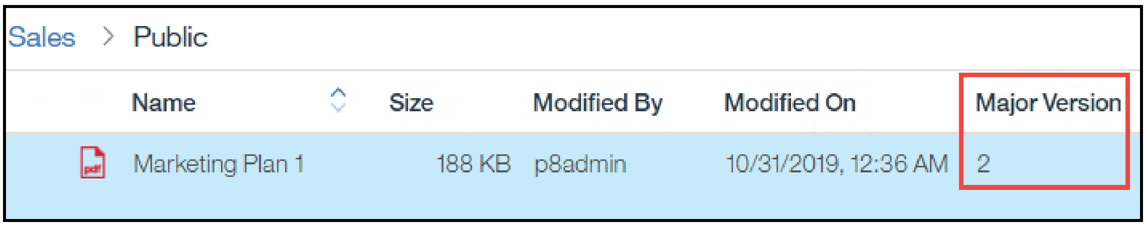
3.9. Inspect document versions

The document that you checked in has a version history. You can download and read earlier versions of the document. You can also determine the date and modifier for the document versions.

You are logged in to IBM Content Navigator. You are in the **Sales** > **Public** folder.

__ 1. Notice that the **MarketingPlan1.pdf** document that you checked in has a value **2** for **Major Version**.


Sales > Public

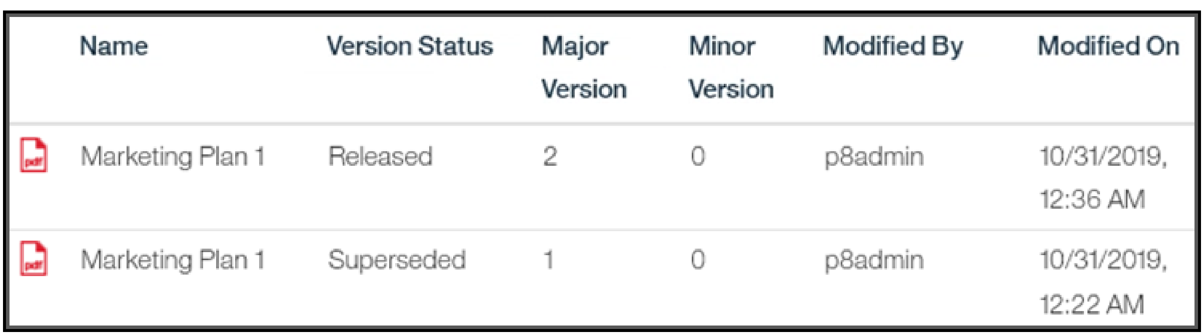
Name	Size	Modified By	Modified On	Major Version
Marketing Plan 1	188 KB	p8admin	10/31/2019, 12:36 AM	2

__ 2. Right-click the document and select **Properties** from the list.

__ 3. On the **Properties** page, click the **Versions** tab.

__ 4. Verify that the document has two versions with p8admin as the modifier on both occasions.

The current version is **Released** and the prior version is **Superseded**.



Name	Version Status	Major Version	Minor Version	Modified By	Modified On
Marketing Plan 1	Released	2	0	p8admin	10/31/2019, 12:36 AM
Marketing Plan 1	Superseded	1	0	p8admin	10/31/2019, 12:22 AM

5. Click **Cancel** to close the **Properties** page.

3.10. Drag a folder with documents

In IBM Content Navigator, you can drag a folder with documents from a local directory to a repository.

__ 1. You are logged in to IBM Content Navigator.

__ 2. On the left pane, select the **Test** folder.

__ 3. In **Windows Explorer**, browse to the **C:\Training\WF270G\SampleDocs** folder.

__ 4. Drag the **Pictures** folder into the IBM Content Navigator **Test** folder.

__ 5. Click **Add** on the **Add Document** wizard.

__ 6. On the **Browse** view, verify that the **Pictures** folder is added under the **Test** folder.

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__ 7. Open the **Pictures** folder and verify that several documents are added.

__ 8. Log out of **IBM Content Navigator**.

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Section 4. Search for content in IBM Content Navigator

Use the IBM Content Navigator search tool to search for documents or folders by their metadata. You can also search for documents by their content.

In this section, you create searches, configure the Results Display, and save searches.

4.1. Search for documents by their property values

__ 1. Start the IBM Content Navigator Sample Desktop.

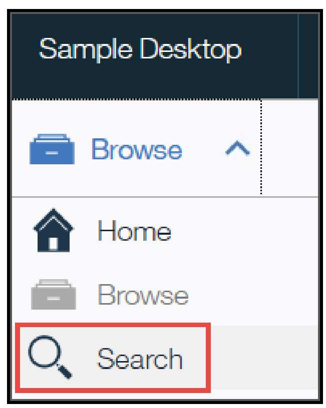
__ a. In the **Firefox** browser, click the **Sample Desktop** shortcut. Or go to the **URL**: `http://ecmedu01:9081/navigator/?desktop=SampleDesktop`

__ b. Log in to IBM Content Navigator:

- **User name**: `p8admin`
- **Password**: `FileNet1`

The desktop opens in **Browse** view with the **Sales** repository as the default.

__ 2. Click the down arrow next to **Browse** on the upper left and select **Search**.



__ 3. On the **Search** view, create a search.

__ a. On the upper right of the page, verify that the **Sales** repository is selected.

__ b. On the upper left of the page, click **New Search** > **New Search**.

__ c. On the **New Search** page, for the **Search in** field, verify that the **Sales (Including subfolders)** repository is already selected.

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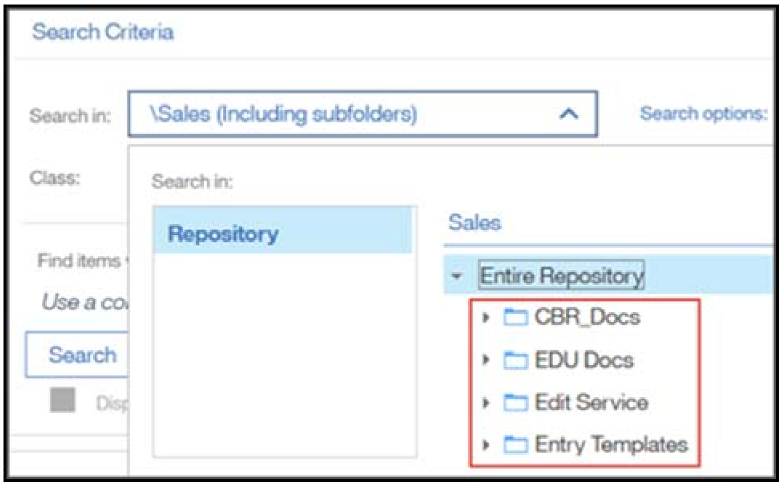
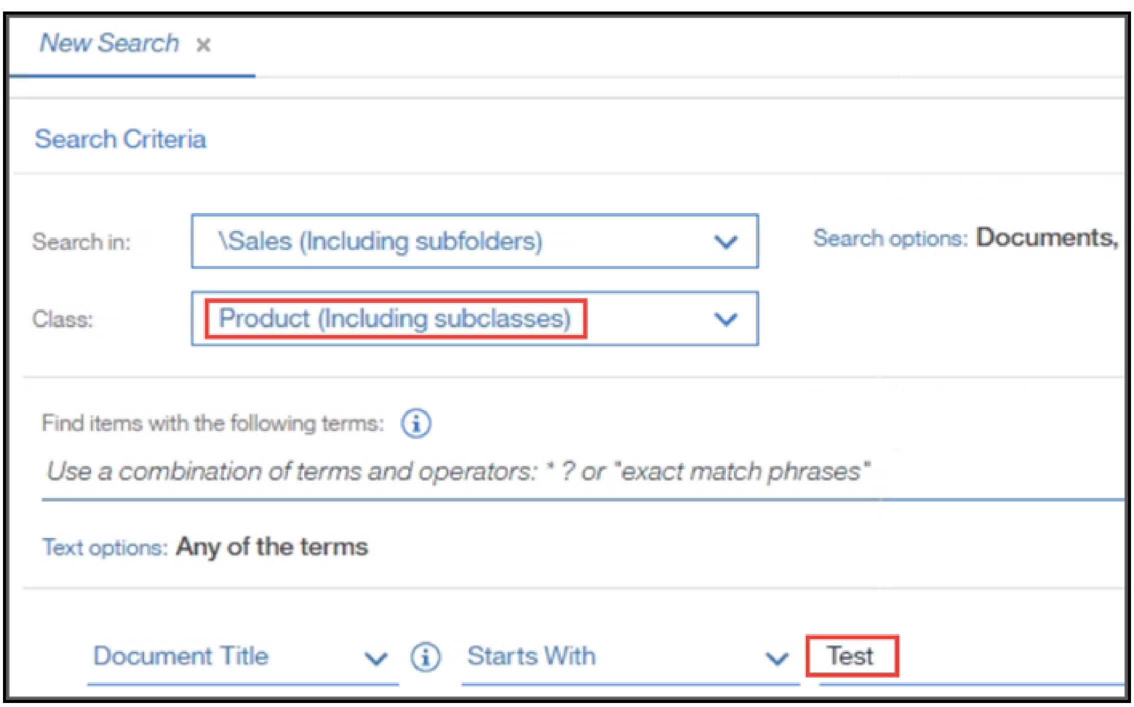
Information

For better performance, when you have a lot of documents, you can select a particular folder within the repository to search.



__ a. Select or enter the following search criteria

Property	Operator	Value
Class		Product
Document Title	Starts With	Test



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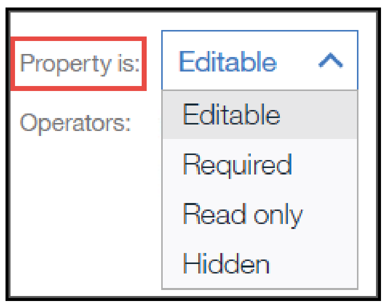
Information

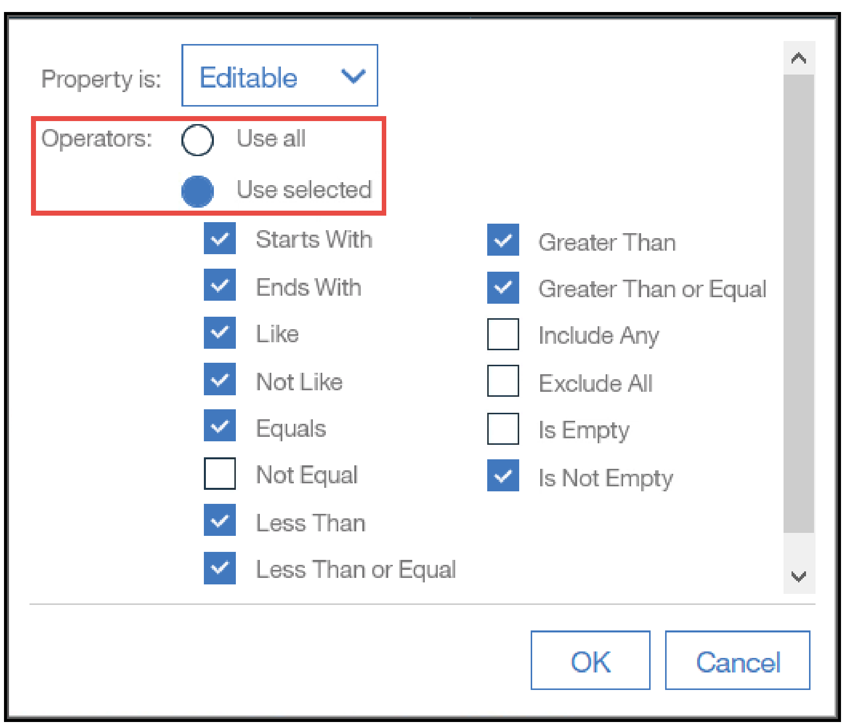
For search criteria, you can set the search property status and restrict the operators that you want to show.

- Hover over the property row, and click the **Advanced settings** icon.

- For the **Property is** field, the following options are available: Editable, Required, Read only, Hidden
  When you save the search and use it in future, the property in the search criteria is editable, required, read only, or hidden (based on the value you select for the **Property is** field).



- For **Operators**, click the **Use selected** option and then choose the operators that you want that you want to be allowed for search.
- The selection of the operators are applicable (for saved searches) when you select **Editable** as the value for the **Property is** field.



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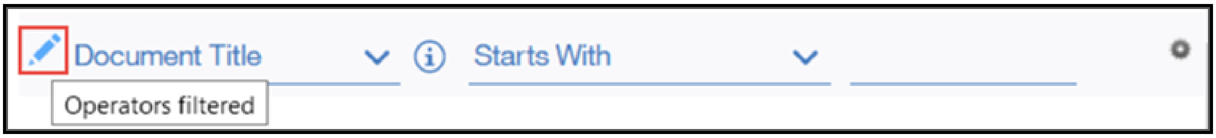
When the operators are limited, an icon for **Operators filtered** is shown.



__ 4. On the lower left, click **Search** to run the search.

__ 5. Verify that the search results return the documents with titles that start with **Test**.

4.2. Save the search

__ 1. Click **Search Criteria** and then click **Save**.

__ 2. On the **Save Search** dialog box, enter a name for your search (example: `Test Docs`) and a description.

__ 3. For the **Save in** field, select **Sales > Saved Searches**.

You save the search to a folder in the repository.

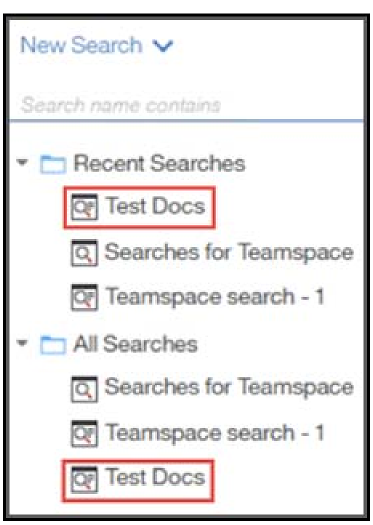
__ 4. Select the **Run the search when opened** and **Show the search in the folder structure** options.

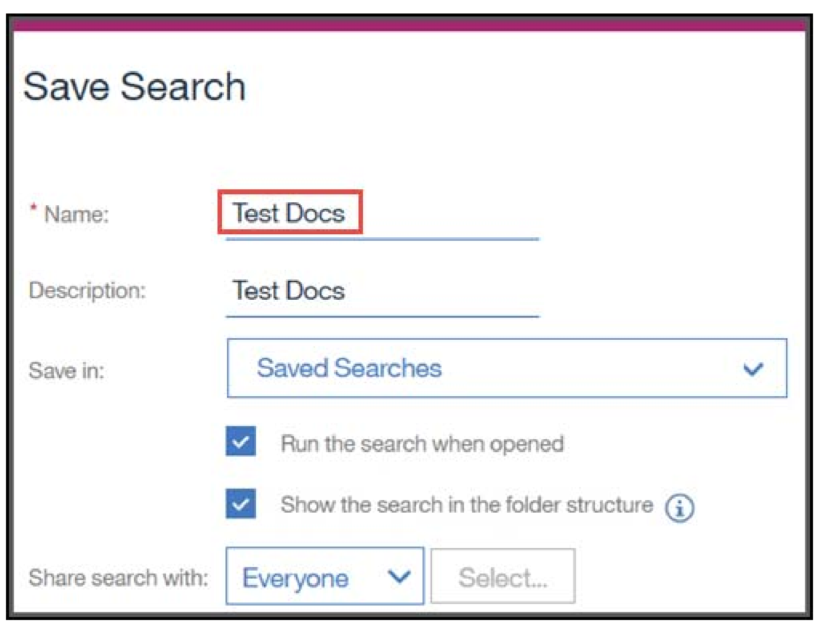
__ 5. Select **Everyone** from the list for the **Share search with** field.

__ 6. You can restrict which users can see this stored search.

__ 7. Click **OK** to close the window.

__ 8. Back on the **Search** view, verify that the **Recent Searches** and **All Searches** folders on the left pane list your saved search.





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__ 9. Close the **Test Docs** tab.

__ 10. Leave the IBM Content Navigator **Search** view open for the next section.

4.3. Search for documents by their content

In this section, you search for documents based on the text in the document.

Note

The Sales repository is configured for Content-Based Retrieval (CBR). For more information, on how to configure CBR for a FileNet Content Manager repository, refer to the F2810 - IBM FileNet P8 Platform Administration (V5.5.x) course.

You are signed in as **p8admin** and on the **Search** view. The **Sales** repository is selected.

__ 1. Create a search.

__ a. Click **New Search**> **New Search**.

__ b. For the **Search in** field, verify that the **Sales (Including subfolders)** is selected.

__ c. For the **Class** field, select **Product** and then click **OK**.

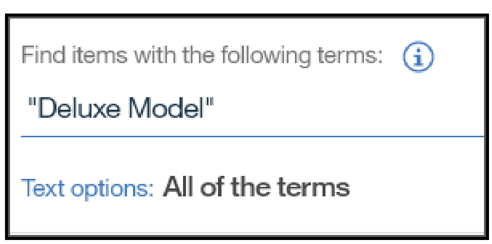
__ d. For the **Find items with the following terms** field, enter “`Deluxe Model`” (with quotation marks).

The **Find items with the following terms** field becomes available only if the system is configured for Content-Based Retrieval.

__ 2. Click the **Text options** link and explore the options.

__ a. Select the **All of the terms** option for this search.

__ b. Leave the default value for the **Text search is:** field (**Editable**) and then click **OK**.



Information

The quotation marks surrounding the phrase return the documents that have the exact matching phrase.

Without quotation marks, if you select **All of the terms** for the **Text options**, IBM Content Navigator inserts **AND** and changes **Deluxe Model** to **Deluxe AND Model** for your CBR search.

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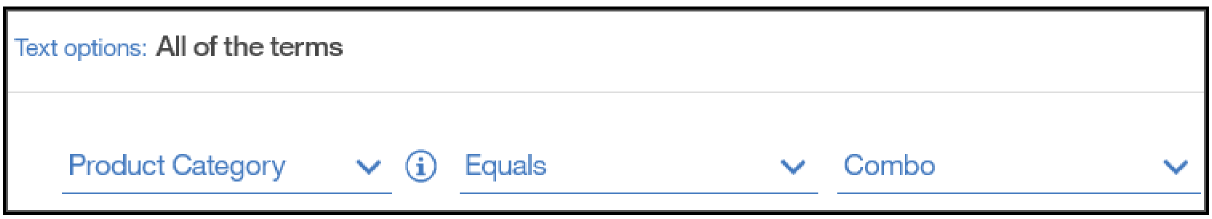
Without quotation marks, if you select the **Any of the terms** option, IBM Content Navigator inserts **OR** and changes **Deluxe Model** to **Deluxe OR Model**.

With the **Proximity** option, you can search for terms that must be close to one another in the document. You set the number of words that can separate the terms.

Use Advanced operators to include more complex queries with mixed expressions.

__ 3. Right below **Text options**, select the following values from the list for the property criteria: **Product Category, Equals, Combo**



You can combine both CBR and property-based searches. This step is optional for CBR search, but it improves the performance because of the number of documents to be searched is also limited by the property value. If you don't include the property criteria, the number of documents in the search results are likely to be higher.

Information

You can configure the search results to include all the properties that are associated with an item type or a document class.

For performance reasons, the **Display all properties** check box is disabled when searching on all subclasses of a class.

Use of the **Search Results Display** option (for this section, you use this option) and the **Display all properties** option are mutually exclusive.

__ 4. Click **Results Display** on the lower right to change what properties are displayed in the search results and the order in which they are shown.

__ 5. In the **Search Results Display** window, move **Product ID** and **Product Price** from the **Available** to the **Selected** pane.

__ a. Enter the first few letters (Example: **Pr**) in the search field to find the properties quickly.

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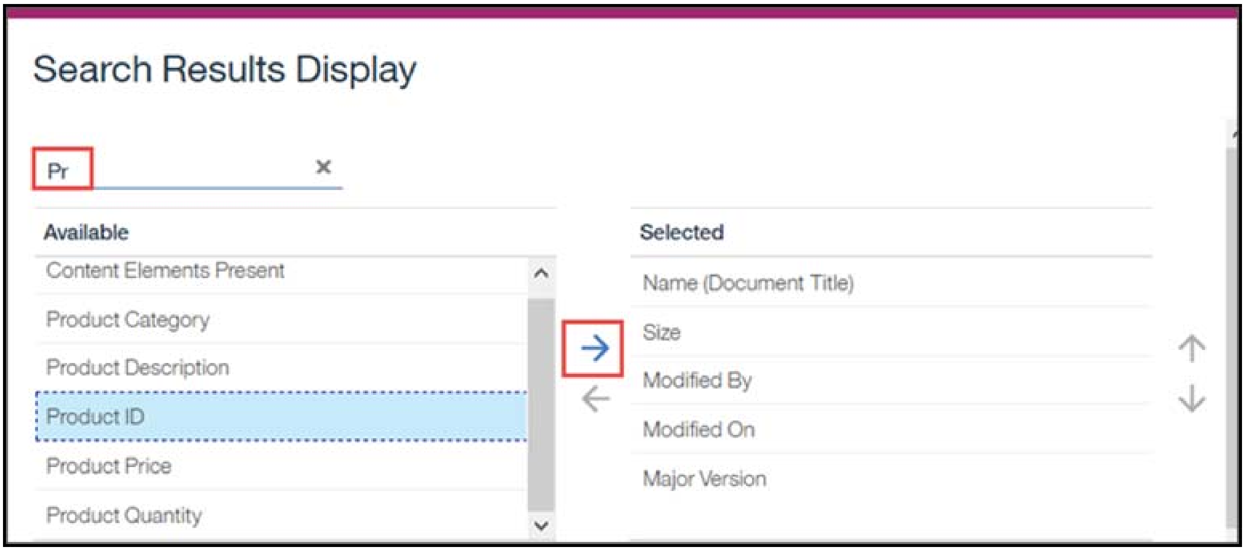
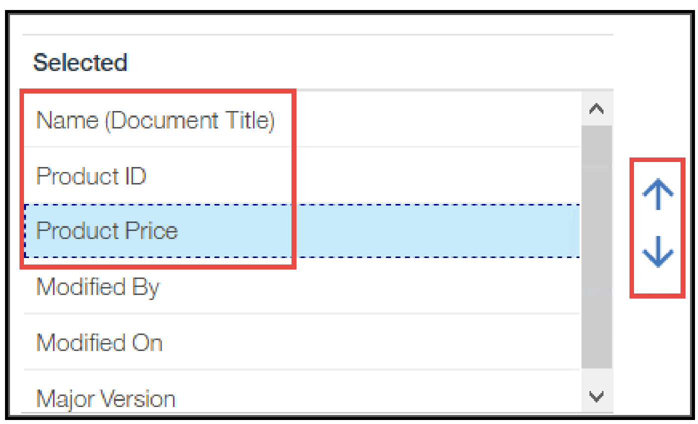


__ b. Move **Size** from the **Selected** to the **Available** pane.

__ c. Click **Product ID i**n the **Selected** pane and use the up arrow to move it up so it is listed immediately after Name (**Document Title**).

__ d. Repeat the step to move up **Product Price** immediately after **Product ID**.



__ e. Click **OK**.

__ 6. Back on the **New Search** page, click **Search** to run the search.

__ 7. Verify that the search returned a list of documents in the **Search Results** section.

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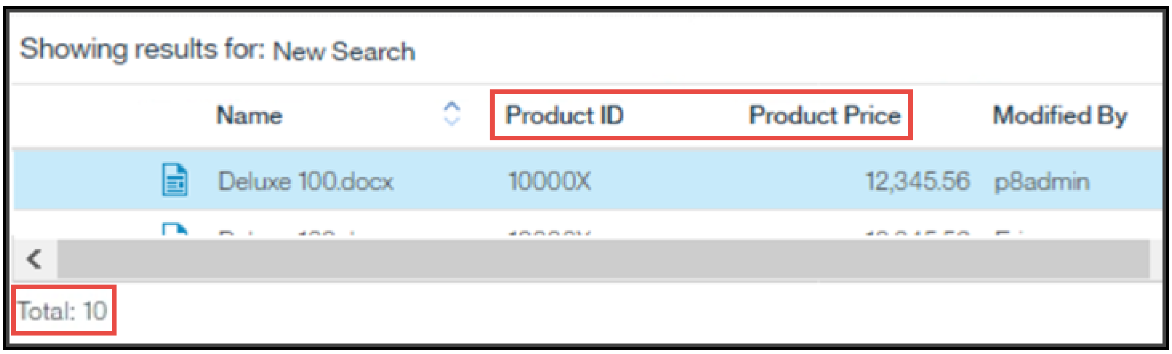
Hint

If the search results are not shown, maximize the browser window and use Zoom out on the browser.

From the browser toolbar, click **View** > **Zoom** > **Zoom Out** to see the complete graphic user interface (GUI).

__ a. Observe that the columns are shown in the order you configured for the **Results Display**.

__ b. Notice that the number of documents (document count) in the search results are shown at the end of the page.

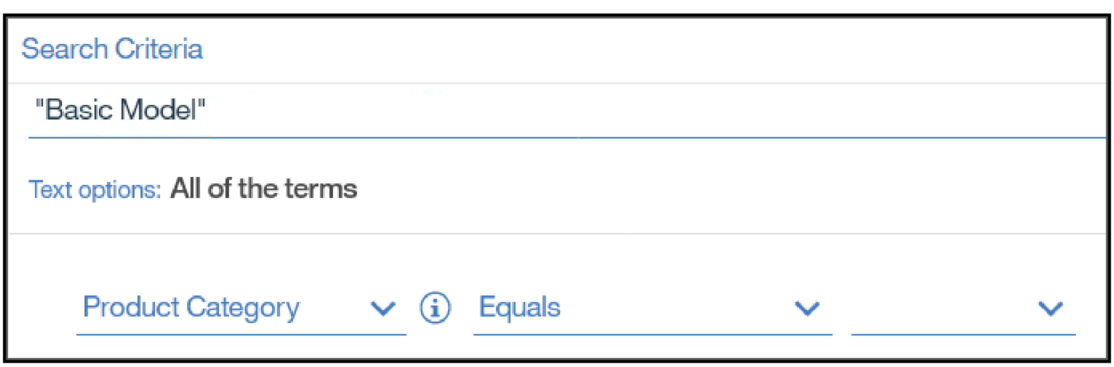


__ 8. Right-click a document, and then select **Preview** from the list to open the document in the **Viewer**.

__ 9. In the **Viewer**, verify that the document contains the term **Deluxe Model** and close the Viewer.

__ 10. Optionally, do searches with different criteria:

__ a. Change the search term to "`Basic Model`" or `Test` (instead of Deluxe Model), remove the value for Product Category property and inspect the results.



__ b. Similarly, change the property value to **Basic** or **Deluxe** (instead of Combo) and do the search.

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Some combinations might not return any results.

__ 11. Save the search with the data that is provided in the following table.

__ a. Click **Search Criteria** at the top to expand the section.

__ b. Click **Save** and use the data in the following table to complete the Save Search.

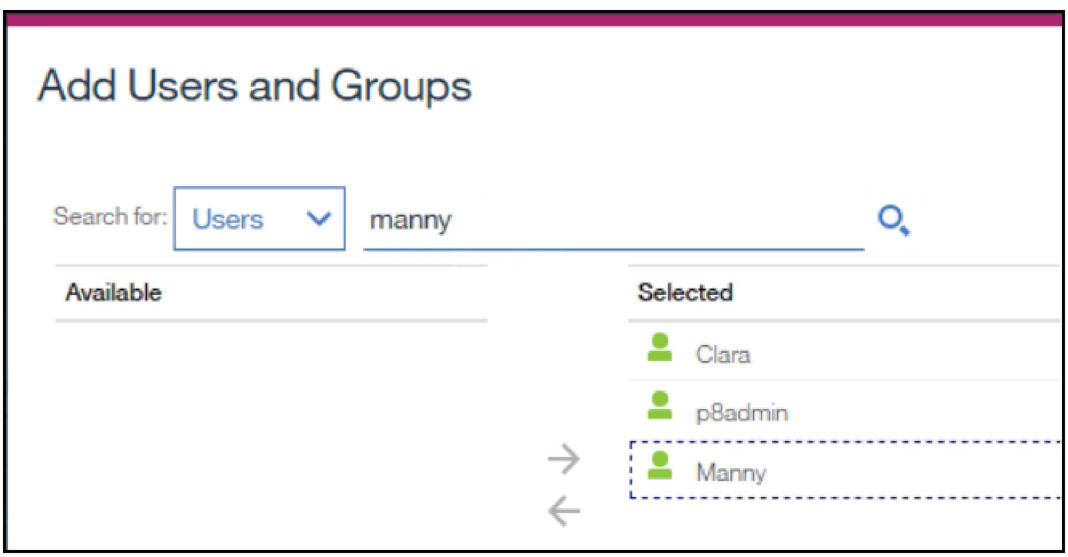
Item	Value
Name of the Search	`Deluxe Model documents`
Save in (Repository > Folder)	`Sales > Saved Searches`
Run the search when opened Show the search in the folder structure	Select the options
Name of the users to Share the Search with	Clara, p8admin, Manny

__ 12. For the **Share search with** field, select **Specific users and groups** from the list.

__ a. On the **Add Users and Groups** window > **Search for** field, select **Users**.

__ b. Enter one user name (from the table) at a time and then click **Search** (Magnifying icon).

__ c. Click the forward arrow to move the user from the **Available** pane to the **Selected** pane.



__ d. After you find all the users, click **Add**.

__ e. On the **Save Search** window, verify that the users are listed and then click **OK**.

__ 13. Observe that the **Recent Searches** and **All Searches** folders on the left pane list the search that you saved.

__ 14. Close the **Deluxe Model documents** tab.

__ 15. Verify that the saved search is shown in the folder.

__ a. Click the down arrow next to **Search** on the upper left and select **Browse**.

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__ b. On the **Browse** view, open the **Saved Searches** folder.

__ c. Verify that your searches are listed.

__ 16. Optional verification.

__ a. Switch back to the **Search** view and close any open tabs.

__ b. Click the search that you saved from the left pane and verify that it returns the search results based on the search criteria.

__ c. Log out of **IBM Content Navigator** and close the browser.

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Section 5. Challenge - Search for a loan document

Optional

Complete the following scenario to practice the tasks that you learned in the previous section.

Scenario: Loan document inspection

You are a Loan Officer. A clerk from your company requests that you verify the loan term for a loan with Loan Number: 100001.

Challenge

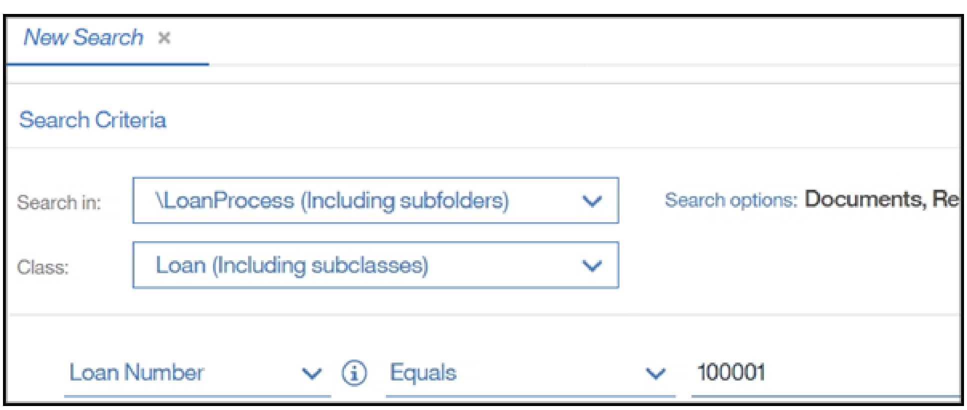
__ 1. Log in to Sample desktop by using the data in the following table:

Item	**Value**
URL for the Desktop	`http://ecmedu01:9080/navigator/?desktop=SampleDesktop`
User name	`p8admin`
Password	`FileNet1`

__ 2. Use the Search view to find the loan document by using the data in the following table.

Item	**Value**
Repository	**LoanProcess**
Class	**Loan**
Property	**Loan Number**
Property value	**100001**
Operator	**Equals**

__ 3. Your Search criteria looks like the one shown in the screen capture.



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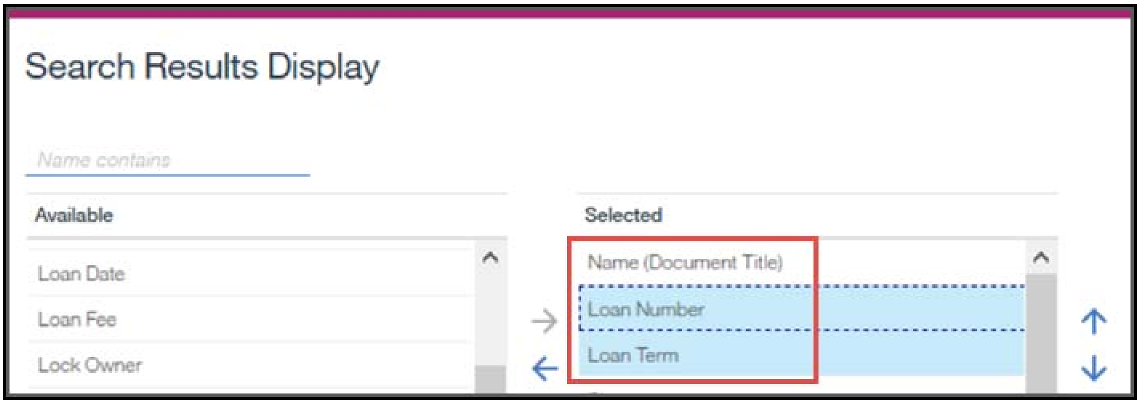
__ 4. Under **Search Criteria**, click **Results Display**.

__ 5. In the **Search Results Display** window, select **Loan Number** and **Loan Term** properties from the **Available** pane to the **Selected** pane.

__ 6. Move the **Loan Number** and **Loan Term** immediately after **Name**.



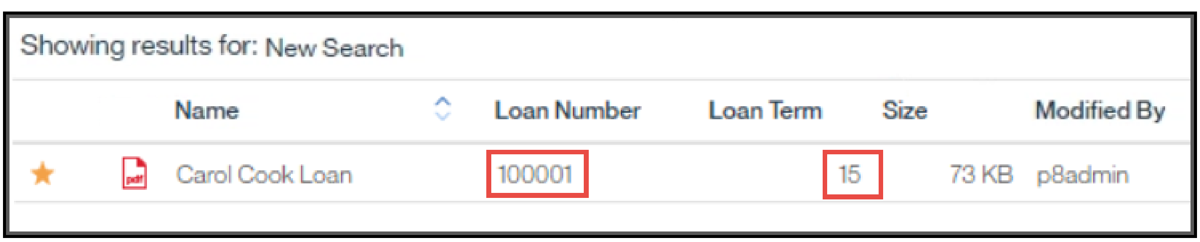
__ 7. Click **OK**.

__ 8. Back on the **New Search** page, click **Search**.

__ 9. Check the value of the **Loan Term** property.

Verification

- Your search returned a loan document for **Carol Cook** with a Loan Number: **100001**
- The document contains the Loan Term property with the value of **15**.
- You determined that the loan term is 15 years.



__ 10. Log out of IBM Content Navigator and close the browser.

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Section 6. Merge and split the documents

6.1. Examine the merge and split configuration on the desktop

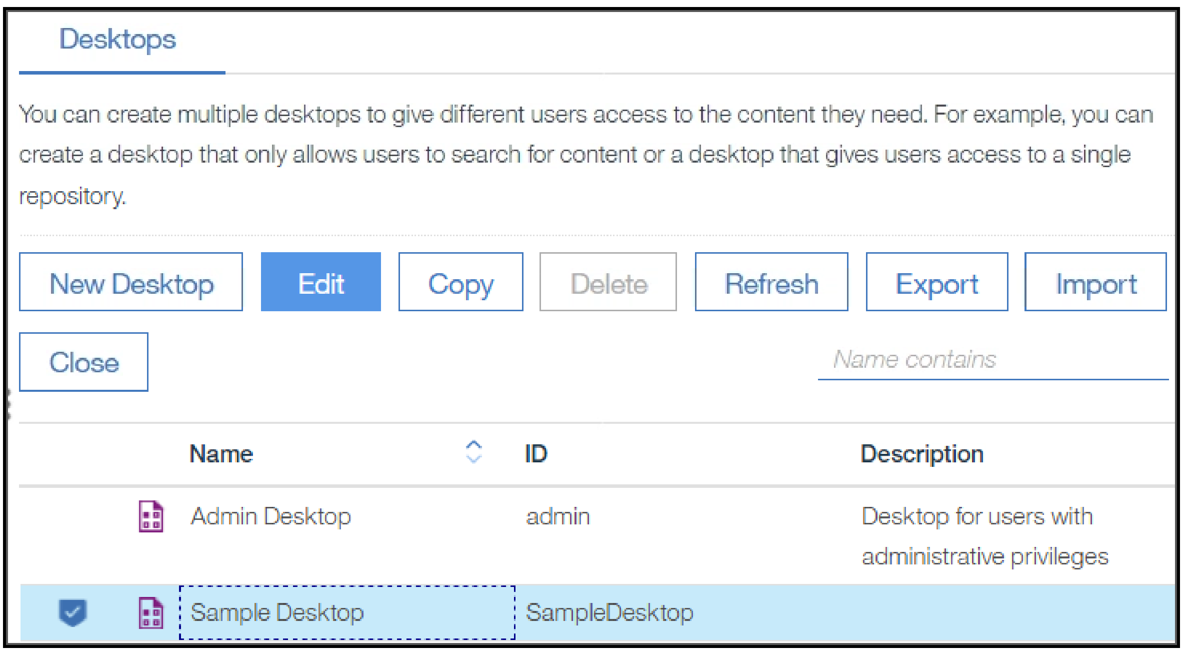
__ 1. Log in to the IBM Content Navigator administration tool.

__ a. In the **Firefox** browser, click the **ICN Admin** shortcut. Or go to the **URL**: `http://ecmedu01:9081/navigator/?desktop=admin`

__ b. Log in to IBM Content Navigator:

- **User name**: `p8admin`
- **Password**: `FileNet1`

__ 2. On the **Desktops** tab, select **Sample Desktop** and then click **Edit**.



__ 3. Verify that Merge and Split is enabled.

__ a. On the **Sample Desktop** tab > **General** subtab, scroll down to the **Desktop Configuration** section.

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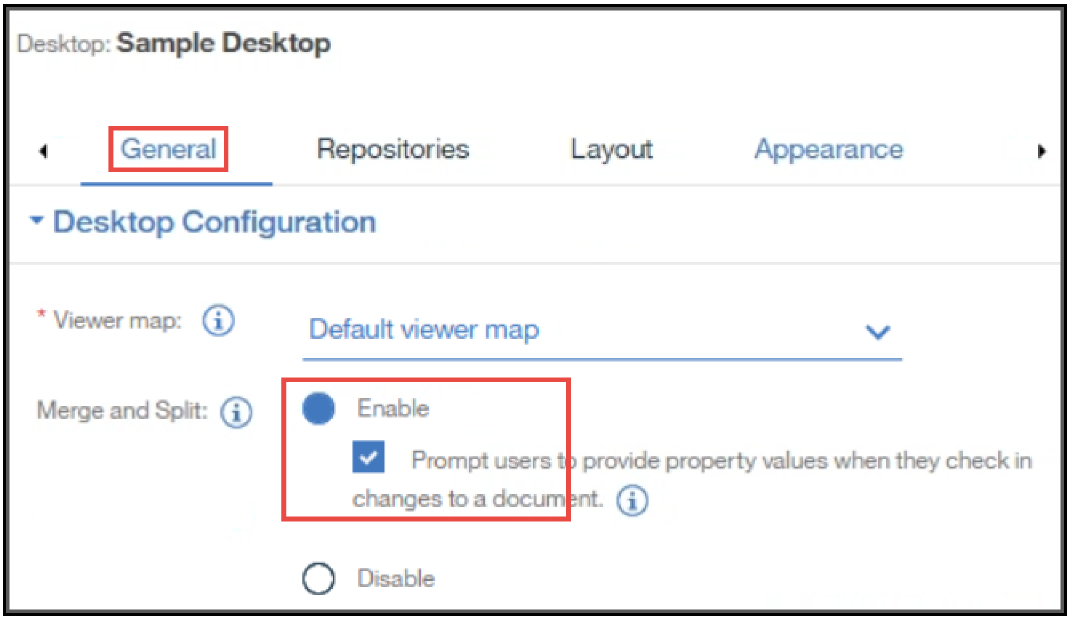
__ b. Verify that for the **Merge and Split** section, the **Enable** and the **Prompt users ...** options are selected.



__ c. Close the **Sample Desktop** tab and then log out of the IBM Content Navigator administration tool.

6.2. Merge and split a document

You can merge and split PDF and Tiff files. By default, these files are mapped to open in the Viewer (a required configuration for merge and split).

__ 1. Start the IBM Content Navigator Sample Desktop.

__ a. In the **Firefox** browser, click the **Sample Desktop** shortcut. Or go to the **URL**: `http://ecmedu01:9081/navigator/?desktop=SampleDesktop`

__ b. Log in to IBM Content Navigator:

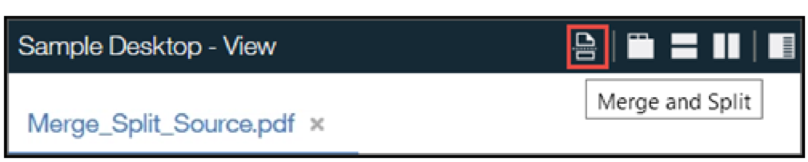
- **User name**: `p8admin`
- **Password**: `FileNet1`

__ 2. Open the document for merge and split.

__ a. Expand the **Sales** repository on the left pane and select the **Sample Docs** folder.

__ b. Double-click the **Merge_Split_Source.pdf** document to open it in the Viewer.

__ c. Verify that the **Merge and split** icon is enabled on the toolbar of the banner



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If you open a file with a file type that is not supported for merge and split, this icon is disabled.

__ d. Click the **Merge and split** icon to switch from view mode to the merge and split mode.

The icon that is beside the document shows it is in the merge and split mode.

__ 3. Create a document from the existing document.

__ a. Click the **New tab on Right** icon to open a new document.

__ b. Expand the window to be able to work with both tabs.

__ c. From the existing document (**Merge_Split_Source.pdf)** pane, select a few pages (Example: flower images).

__ d. Press **Ctrl+C** to copy the pages.

You can also use the **Copy** icon on the toolbar for this document.

__ e. From the **New Document** pane, press **Ctrl+V** to paste the pages.

You can also use the **Paste** icon on the toolbar for this document.

__ 4. Rename the new document.

__ a. Right-click the **New Document** label, and select **Rename.**

__ b. Type `New Flowers` (or any other name).

__ 5. Add the new document to the repository.

__ a. Click the **plus (Add document)** icon on the toolbar of the document.

The Add document wizard opens.

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__ b. For the **Classification** field, select the **Use source document** option.

This option automatically selects the properties that are associated with the Document class for the source document.

__ c. For the **Save as type** field, select **TIFF** from the list.

Note

Even though you copied the pages from a PDF file, you can save the new file as a TIFF file. Similarly, a TIFF file can be saved as a PDF file.

__ d. For the **Document Title** field, edit the value to: `New Flowers.tiff`

When you select the source document for classification, the title is changed to the source document title.

__ e. Click **Add** to add the document.

IBM Content Navigator adds the document to the same folder.

After you add the document to the repository, the document is still open in the Viewer.

__ 6. Edit and check in the document.

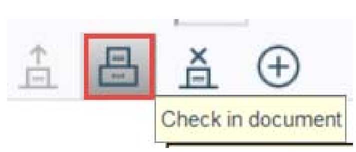
__ a. From the **New Flowers.tiff** tab, select a page, and use the **Cut** (Scissors) icon to delete that page.

When you do any changes, it automatically checks out the document as indicated by the lock icon on the tab next to the title.

__ b. Click the **Check in document** icon from the toolbar of the document.

The Check In page opens. The option to show the Check In page is enabled in the Administration desktop as you checked in the first section.

__ c. On the **Check In** wizard, click **Check In**.



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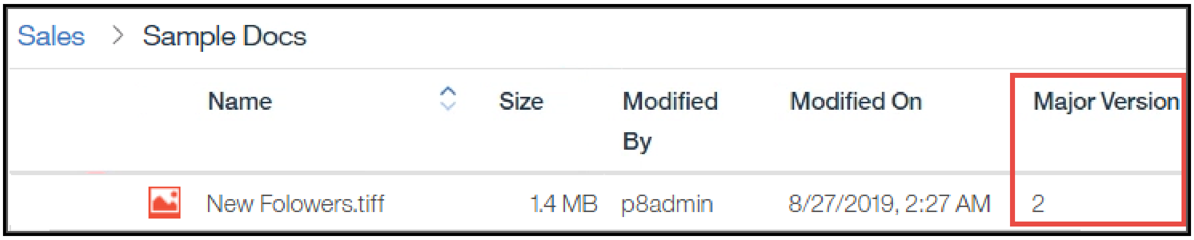
You can also optionally change the properties values or update the security.

__ 7. Close the documents in the **Viewer** and close the **Viewer**.

__ 8. On the **Browse** view, in the **Sample Docs** folder, verify the new version for the **New Flowers.tiff** document.

Major Version column shows the value: **2**



Information

In this section, you copied some pages from an existing source document and created a new document by using the copied pages. Similarly, you can open two existing documents, and copy pages from one document to the other to merge the pages.

__ 9. Edit the security for the document.

Important

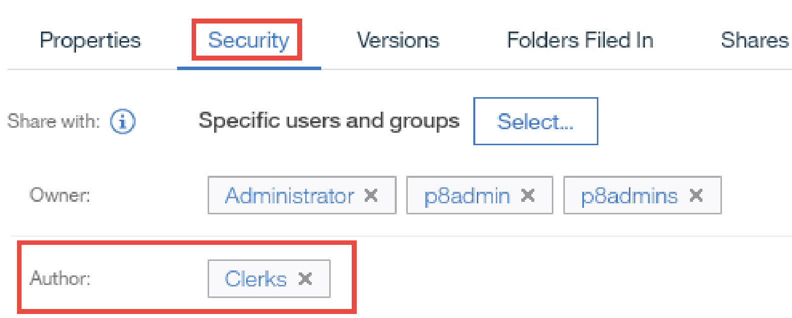
This step is important for the next section. It gives permission for another user to check out the document.

__ a. Right-click the **New Flowers.tiff** document and select **Properties** from the list.

__ b. On the **Properties** page, select the **Security** tab and click the **Clerks** link.

__ c. Click the down arrow next to **Reader** and then select **Author** from the list for the **Permissions** field and then click **OK**.

__ d. On the **Properties** page, verify that **Clerks** are listed for **Author**.



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__ e. Click **Save**.

__ 10. Leave IBM Content Navigator open for the next section.

6.3. Manage version conflict

In this section, you log in to the IBM Content Navigator Sample Desktop as two different users (Clara and p8admin) at the same time on two different browsers and work on the same document. You observe the version conflicts shown and decide the next steps.

You are logged in to the **IBM Content Navigator** as **p8admin** and the **Browse** view is open. The **Sales** repository > **Sample Docs** folder is open from the previous section.

__ 1. Double-click the **New Flowers.tiff** document to open it in the **Viewer** and leave the viewer open.

__ 2. Log in to the IBM Content Navigator Sample Desktop as Clara.

__ a. Go to the **Google Chrome** browser. You should now have both Firefox and Chrome open.

__ b. In the **Google Chrome** browser, click the **Sample ICN Desktop** shortcut. Or go to the **URL**: `http://ecmedu01:9081/navigator/?desktop=SampleDesktop`

__ c. Log in:

- **User name**: `Clara`
- **Password**: `FileNet1`

__ 3. Check out a document.

__ a. Expand the **Sales** repository on the left pane and select the **Sample Docs** folder.

__ b. Right-click the **New Flowers.tiff** document and select **Check Out** > **Check Out Only** from the menu list.

__ c. Verify that the document is checked out as indicated by a lock icon in front of the document.

Troubleshooting

If you are not able to check out the document, it is most likely that **Clerks** were not given **Author** permission to edit.

- Close the **Chrome** browser.
- Ensure that you complete **Section 6.2, step 9**.
- Continue with **Section 6.2, step 10**.

__ d. Leave the **Chrome** browser open.

__ 4. Switch to the **Firefox** browser where p8admin signed into the **Sample Desktop** and the **New Flowers.tiff** document is already opened in the Viewer.

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__ 5. Edit the same document.

__ a. On the **Viewer**, click the **Merge and split** icon to switch from view to the merge and split mode.

__ b. Click the **Check out** icon on the toolbar.

__ c. Verify that you receive a message for **Checkout conflict**: The `document is checked out by another user.`

Since this document is already checked out by Clara, p8admin cannot check out the document for editing (merge and split).

__ d. On the message window, click **Close.**

__ e. Leave the **New Flowers.tiff** document open in the **Viewer**.

__ 6. Check in the document that Clara checked out.

__ a. Go back to the **Google Chrome** browser where Clara logged in to the **Sample Desktop**.

__ b. In the **Sample Docs** folder, right-click the **New Flowers.tiff** document and select **Merge and split** from the menu list to open it in merge split mode.

__ c. Optionally, edit the document.

__ d. Click the **Check in document** icon from the toolbar of the document.

__ e. On the **Check In** wizard, click **Check In**.

__ f. Close the Viewer.

__ g. Back on the **Browse** > **Sample Docs** folder, verify the new version (The **Major Version** column has the value: **3**).

__ h. Log out and close the **Chrome** browser.

__ 7. Switch to the **Firefox** browser where p8admin signed into the **Sample Desktop** and the **New Flowers.tiff** document is already open in the Viewer.

__ 8. Edit the document.

__ a. Click the **Check out** icon to edit the document (merge and split).

You can check out because Clara checked in the document, but a message indicates that a `newer version of the document is vailable` and prompts you to confirm

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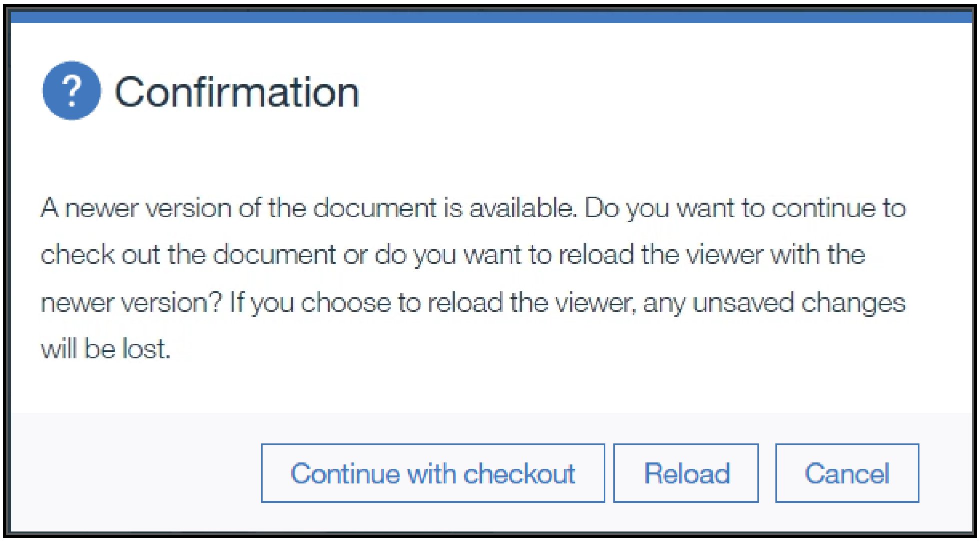
whether you want to **continue with check out** or **reload** the viewer to get the newer version.



In the example scenario, after you opened the document in the Viewer, another user checked in a new version. Then, when you try to edit the document, you got a message that informed you of the change.

You can choose to proceed with the check-out or reload the document in the viewer. You can also cancel, and add your changes as a new document.

__ b. For this section, click **Reload** and then close the viewer.

__ c. Log out of the **Sample Desktop** and close the browser.

End of exercise

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Exercise review and wrap-up

This exercise showed how to work with repository content in IBM Content Navigator.

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Exercise 2. Configuring an IBM Content Navigator desktop

Estimated time

04:00

Overview

In this exercise, you learn how to configure various components for an IBM Content Navigator desktop.

Objectives

After completing this exercise, you should be able to:

- Configure a repository
- Create an IBM Content Navigator desktop
- Find content with a cross-repository search
- Create and manage teamspaces
- Configure role-based desktop administration

Introduction

To access the content in a FileNet Content Manager repository in IBM Content Navigator web client, you must first connect to the repository and configure it in IBM Content Navigator.

By default, an administration desktop is included with IBM Content Navigator. You must create at least one desktop for your users before they can access the web client.

In this exercise, you configure a FileNet Content Manager repository and create a IBM Content Navigator desktop. You define a cross-repository search to search for content that is stored on multiple repositories. You also configure teamspace management and create a teamspace template and a teamspace.

IBM Content Navigator role-based administration enables a global administrator to move some administration tasks to department-level administrators. In this exercise, you configure role-based desktop administration.

This exercise includes the following sections:

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Requirements

The activities in this unit assume that you have access to the student system that is configured for these activities and all components are running when you begin an exercise.

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Section 1. Configure a repository

Introduction

In this section, you connect to a FileNet Content Manager repository and configure it in IBM Content Navigator web client.

1.1. Create a connection to a repository

Important

Before you begin the exercise, ensure that the components are running. If you did not start the components already, refer to Section 1, "Prepare your system: Start the components," on page 1-3 to start them.

__ 1. Start the IBM Content Navigator administration tool.

__ a. Open the Firefox browser and click the **ICN Admin** shortcut. Or go to the **URL**: `http://ecmedu01:9081/navigator/?desktop=admin`

__ b. Enter the following values:

- **User name**: `p8admin`
- **Password**: `FileNet1`

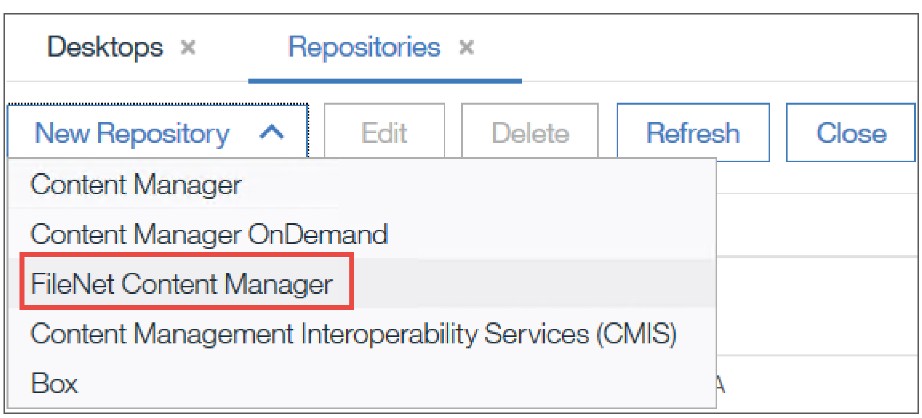
__ c. Click **Log in**.

__ 2. Open the **New Repository** tab.

__ a. On the left pane, click **Repositories**.

On the **Repositories** tab, a list of the repositories that are configured is shown.

__ b. Click **New Repository** and then select **FileNet Content Manager** from the list.



__ 3. On the **New Repository** tab > **General** subtab, enter `SalesQA` for the **Display name** field.

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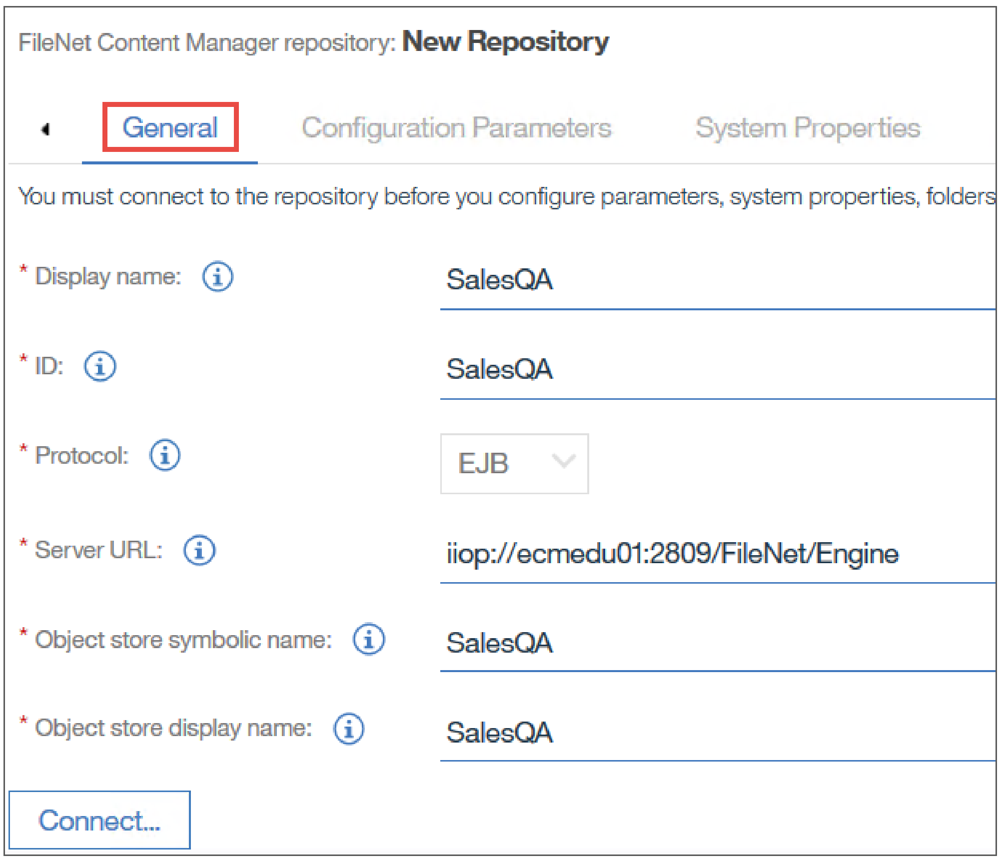
The **ID** field is automatically populated based on the **Display name** field entry. The **ID** value can be edited but it is easier to maintain the same symbolic and display names.

__ 4. Set the values for the following properties:

- **Server URL**: `iiop://ecmedu01:2809/FileNet/Engine`
- **Object store symbolic name**: `SalesQA`
- **Object store display name**: `SalesQA`

The value `ecmedu01` is the server name.
A FileNet Content Manager object store that is called **SalesQA** already exists.



__ 5. Click **Connect** to test the repository connection.

__ 6. On the **Log In** page, enter the credentials for a user that has administration access to the repository.

- **User name**: `p8admin`
- **Password**: `FileNet1`

__ 7. Click **Log in**.

__ 8. Click **Save** to save the changes.

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Hint

Click the **information** icon (**i**) next to each field name to get more details about that field.

1.2. Set configuration parameters

__ 1. Click the **Configuration Parameters** subtab.

__ 2. Scroll through to view the fields and leave the default values for the following fields:

- **Document name property: Document Title**
- **Folder name property: Folder Name**
- **Add as major version: Yes**
- **Check in as a major version: Yes**
- **Annotation security: Duplicate the security of the containing document**
- **State icons**
- **File name to use when downloading documents: Use the file name**

__ 3. Under the **Optional Features** section, select **Yes** for **Track Downloads**.

__ 4. Select **Enable** for the following fields.

- **Sync services**
- **Teamspace management**
  - Select **Allow owners to modify the roles of existing teamspaces** option
- **Entry template management**

__ 5. For all other fields, leave the defaults.

__ 6. Click **Save** to save the changes.

Note

You are going to learn about each of these features in detail and configure other fields for the repository in the following units.

1.3. Set the system properties

__ 1. Click the **System Properties** subtab.

__ 2. Verify that the **Documents** option is selected for the **System properties for** field.

The properties that are listed in the **Selected Properties** pane are shown for the documents on this repository.

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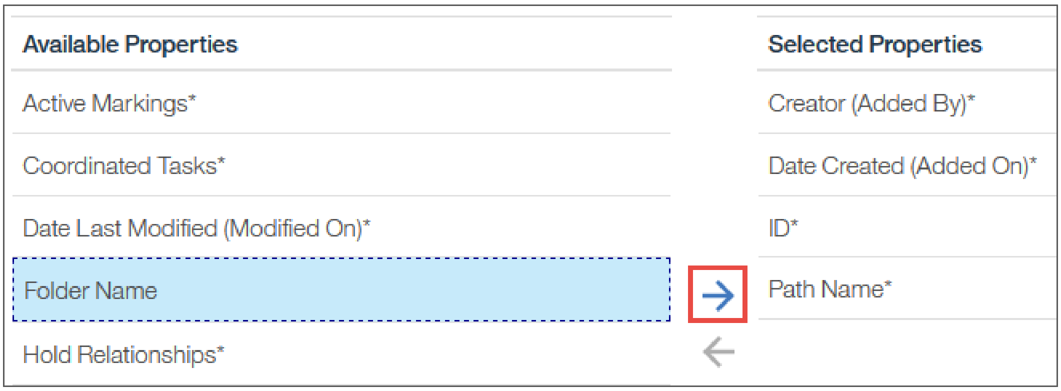
__ 3. Set the system properties to show for folders.

__ a. Select **Folders** from the list for the **System properties for** field.

__ b. Select **Folder Name** from the **Available Properties** pane.

__ c. Click the forward arrow to move **Folder Name** to the **Selected Properties** pane.



__ d. Verify that the **Folder Name** property is listed in the **Selected Properties** pane.

__ e. Click **Save** to save the changes.

1.4. Configure the Browse view

__ 1. Click the **Browse** subtab.

__ 2. Configure the properties to show in the content list when users are browsing.

The properties in the **Selected Properties** pane are shown on the content list for users.

__ a. From the **Available Properties** pane, select **Class**.

__ b. Click the forward arrow to move **Class** to the **Selected Properties** pane.

Note

You can change the order of the properties on the **Selected Properties** pane. Select a property and use the upward or downward arrow to change the display order.

On the **Selected Properties** pane, you can also select a property to show in the **Details** View or **Magazine** view or both.

__ 3. Click **Save** to save the changes.

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1.5. Configure the Search view

__ 1. Click the **Search** subtab.

__ 2. To configure the **Search** view, select the values that are given in the following data table.

Field	Value
Cross-Repository Searches	Enable
Number of results	Limit to: 50
Timeout (in seconds)	Limit to: 180
Match	Match any of the search criteria
Allow search on	Documents, Folders
Default Search Type	Documents
Default search version	Released version

__ 3. To configure **Search Roles**, move **p8users** to the **Users** role in the following steps.

__ a. Click **X** next to **p8users** to remove p8users from **Creators**.

__ b. Click **Select Users and Groups** that is next to the **Assign search roles** label.

__ c. On the **Add Users and Groups** page, select **Groups** for the **Search for** field.

__ d. Search for **p8users** and then click the forward arrow to move **p8users** from the **Available** pane to the **Selected** pane.

__ e. Set the **Permissions** field at the end of the page to **Users** for and click **Add**.

__ f. On the **Search** tab, in the **Search Roles** section, verify that **p8users** are added to the **Users** field.

__ 4. Configure **Searchable properties**.

Users can search based on the properties in the **Displayed Properties** list. You can remove the properties that are used to improve performance.

__ a. Scroll down to the **Searchable properties** section, verify that **Documents** is selected for the **Searchable properties for** field.

__ b. Click the forward arrow to move the following properties from the **Displayed Properties** pane to the **Hidden Properties** pane to hide them.

- **Application name**
- **Classification Status**
- **Is Frozen Version**

5. View the **Search Results** configuration.

__ a. Scroll down to the **Search Results** section.

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The properties in the **Displayed Properties** list are shown for the documents in the search results.

__ b. Leave the defaults for this section and click **Save** to save the changes.

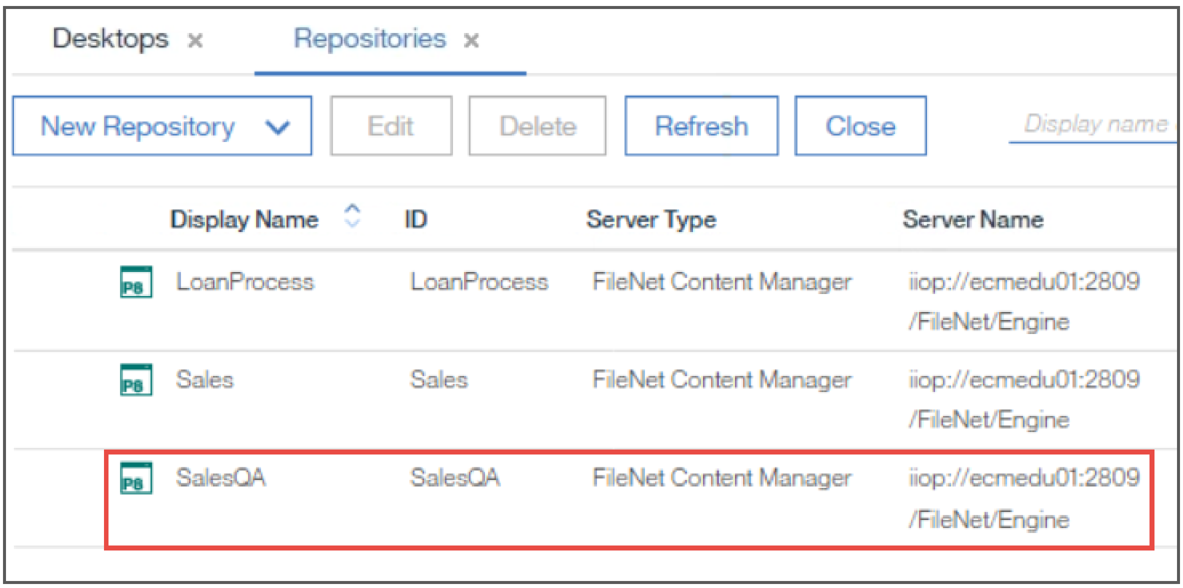
Hint

You can move the properties from the **Displayed Properties** list to **Available Properties** to hide them from the Search results.

1.6. Save and test the new repository

__ 1. Click **Save and Close** to save the settings and close the new repository tab.

__ 2. Verify that the new repository (**SalesQA**) is listed on the **Repositories** tab.



This repository is now available to associate it with a Content Navigator desktop. You are going to associate this repository to a desktop in the next lesson.

__ 3. Leave the IBM Content Navigator administration tool open for next section.

Note

After you configure a repository, you can edit it to change any of the settings except the internal repository **ID**.

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Section 2. Configure an IBM Content Navigator desktop

In this activity, you configure a new desktop in the IBM Content Navigator web client. Each desktop can be configured for specific job roles. It can be customized to access selected repositories and to enable selected features.

2.1. Create a desktop

__ 1. If the IBM Content Navigator administration tool is open, skip to step 3.

__ 2. Open the **Firefox** browser and log in to the IBM Content Navigator administration tool by using the following values:

- **ICN Admin** shortcut or URL: `http://ecmedu01:9081/navigator/?desktop=admin`
- **User name**: `p8admin`
- **Password**: `FileNet1`

__ 3. Click the **Desktops** tab.

A list of the existing desktops is shown.

__ 4. Click **New Desktop**.

__ 5. On the **New Desktop** tab, under the **General** subtab, for **Name,** enter `Sales Desktop` .

__ 6. For **Description**, enter `Desktop for Sales department`.

Note

The ID field is automatically populated based on the Name field entry. This desktop ID is used in the URL for accessing the desktop. It is case-sensitive and can contain only alphanumeric characters.

2.2. Specify a repository for authentication

Specify a repository that you want to use to authenticate users. The repository must already be configured in IBM Content Navigator.

__ 1. From the **Authentication** section, select **Sales** from the list for the **Repository** field.

__ 2. For the **Limit access to specific users and groups** field, select **Enable**.

__ 3. Click **Select Users** and when prompted, in the **Log In** dialog box, enter the following credentials and click **Log In**.

- **User name**: `p8admin`
- **Password**: `FileNet1`

__ 4. On the **Add Users and Groups** page, select **Users** for the **Search for** field and search for `p8admin`.

__ 5. Click the forward arrow to move the user from the **Available** to the **Selected** pane.

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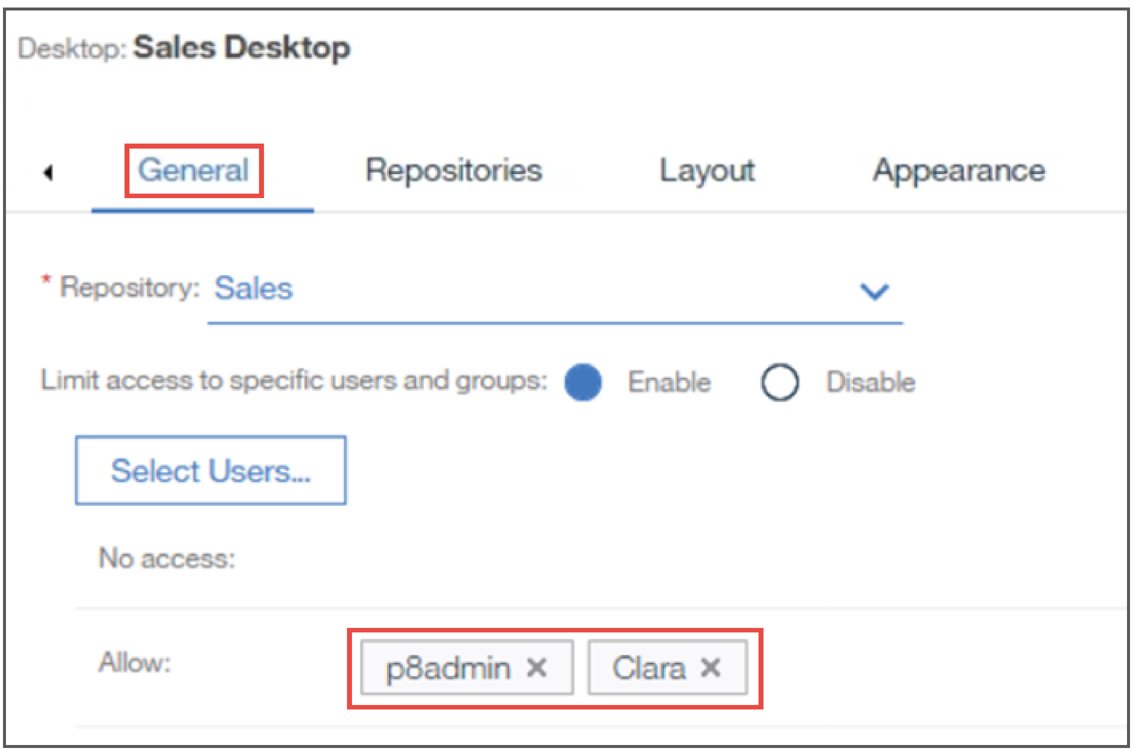
__ 6. Scroll down to the end of the page and for the **Permissions** field, select **Allow** from the list.

Important

Ensure that **Allow** permission is selected. By default, **No access** is selected.

__ 7. Repeat the steps to add another user, `Clara`.

__ 8. Click **Add** to save and close the page.



__ 9. Click **Save** to save the changes.

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Note

The users that are given access to the IBM Content Navigator (ICN) desktop must also be authorized to access the repository that is used for authentication. The authorization is configured in the corresponding repository. If you don't select any users for the ICN desktop, all the users that are authorized for the repository can access. Selection of the users in the ICN desktop further narrows the access for the repository authorized users.

In the example that is used for this exercise, the Sales repository is configured to authorize the Clerks security group in the FileNet Content Manager repository. Clara and Clark are members of the Clerks group. By specifying Clara for the desktop, Clark cannot access the desktop even though Clark is authorized for the repository.

You can specify users or groups for the ICN desktop authentication.

2.3. Set desktop configuration options

__ 1. Scroll down to the **Desktop Configuration** section, observe that **Default viewer map** is selected for the **Viewer map** field.

__ 2. Leave the **Sync services**, **Edit service**, and **Box share services** disabled.

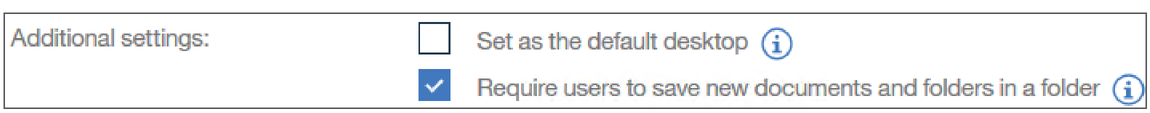
You are going to learn more about these services and the Viewer Maps in later units.

__ 3. Notice that you can configure the **Error message information** for a custom support content URL. Leave the default option (Search IBM Support content).

__ 4. Scroll down to the **Additional settings** section.

__ a. Observe the options available. You can set your desktop as the default desktop.

__ b. Select the **Require users to save new documents and folders in a folder** option.



With this option enabled, users can not add documents unfiled.

__ c. For all other fields, leave the defaults.

In this section, you can also control some aspects of how documents are added and checked in, as well as prevent users from creating searches.

__ 5. Click **Save** to save the changes.

2.4. Configure repositories for the desktop

In this section, you specify the repositories that can be accessed from this desktop.

__ 1. On the **Sales Desktop** tab, click the **Repositories** subtab.

__ 2. Verify that the **Sales** repository is listed in the **Selected Repositories** pane.

When you select a repository for authentication, it is automatically added to the desktop.

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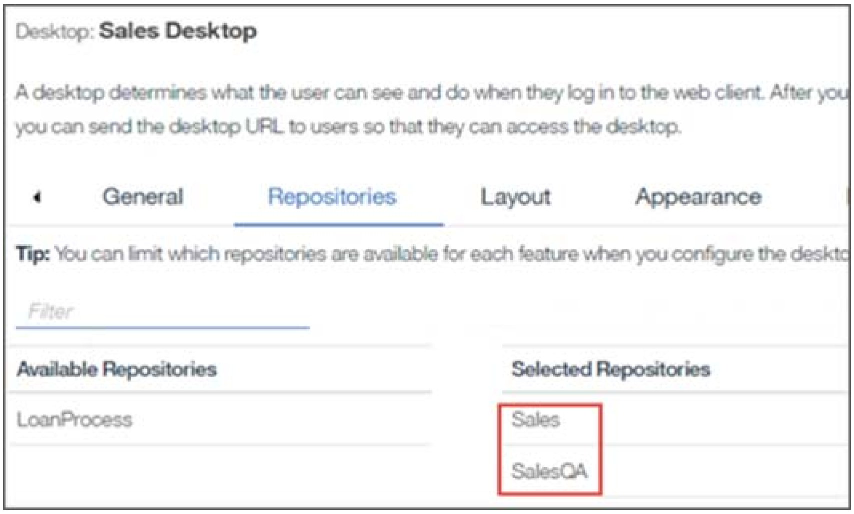
__ 3. Move **SalesQA** from the **Available Repositories** to the **Selected Repositories** pane.



__ 4. Hover your mouse over a repository name to see the repository details.

__ 5. Click **Save** to save the changes.

2.5. Configure desktop layout

In this section, you configure the features that you want to display in this desktop and set the default repositories.

__ 1. On the **Sales Desktop** tab, click the **Layout** subtab.

__ 2. In the **Displayed features** section, verify that the **Home**, **Browse**, and **Search** features are selected.

__ 3. Click **Home** and on the right pane, ensure that the **Default repository** is set to **Sales**.

If **Sales** is not already selected, select **Sales** from the list.

You can control what repositories are available for each feature. A user can switch to other available repositories for searching and browsing.

Hint

From the browser toolbar, click **View** > **Zoom** > **Zoom Out** to see the complete graphic user interface (GUI).

__ 4. Click the **Browse** and **Search** features and observe that **Sales** is set as the **default repository** for **Browse** and **Search**.

__ 5. Select the **Teamspaces** feature. Ensure that the check mark is shown.

__ 6. On the right pane, observe that the default repository is **SalesQA**.

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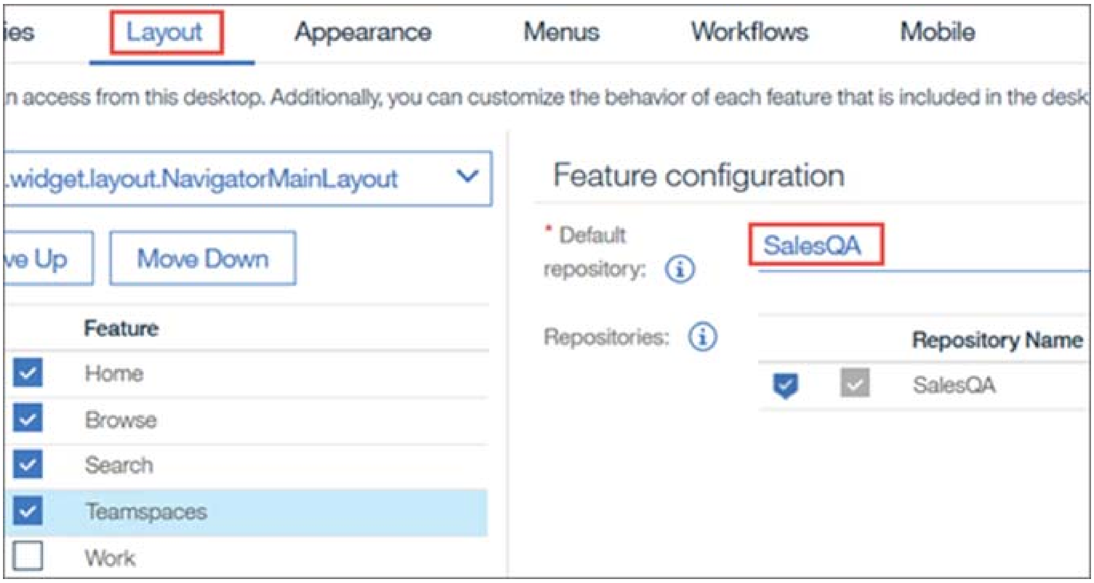
The **Sales** repository is not enabled for **Teamspaces** and not shown as an option for this feature.



Note

The features that you select in the **Layout** subtab are available when a user opens the desktop.

__ 7. Set a feature to be the default for this desktop.

__ a. Scroll down to the **Default feature** field and select **Browse** from the list.

The web client opens with this feature when a user logs in to this desktop.

__ b. Click **Close** when you are prompted with a message: `Changing the default feature may affect the time needed to load the application`.

__ 8. In the **Additional Desktop Components** section, select the **Show** option for the following items:

- **Document thumbnails** to show thumbnails for documents in the preview pane.
- **Global toolbar**
- **Status bar**

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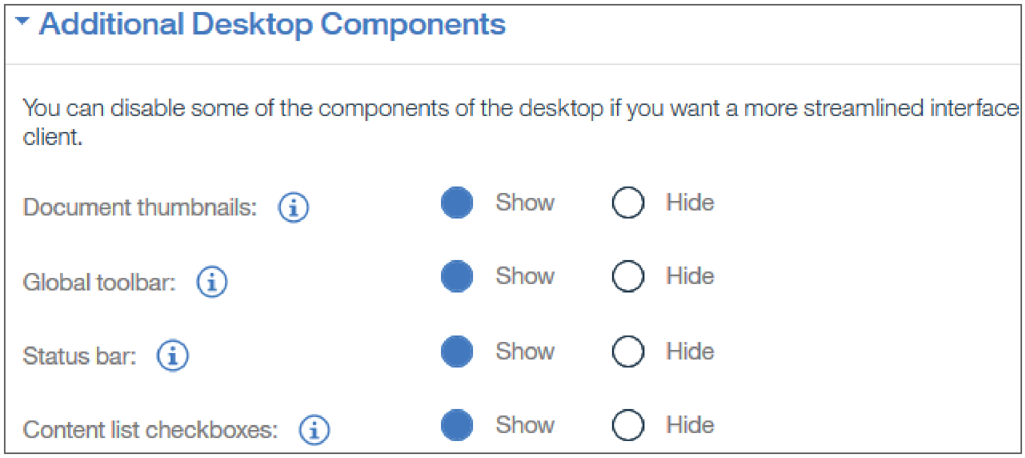
- **Content list checkboxes**



Note

Select only the features that you need for your desktop to improve the performance of the web client. For this exercise, you select all the features to observe how they are shown.

__ 9. Click **Save**.

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2.6. Configure appearance

In this section, you specify an application name for this desktop:

__ 1. On the **Sales Desktop** tab, click the **Appearance** subtab.

__ 2. Enter a value for the **Application name** field (example: `Sales Desktop`).

This value is shown on the banner for this desktop.

For this section, leave the default values for all other fields.

__ 3. Click **Save** to save the changes.

2.7. View the menu options

__ 1. On the **Sales Desktop** tab, click the **Menus** subtab.

__ 2. Scroll down, observe the options available for toolbars and menus and leave the defaults for this section.

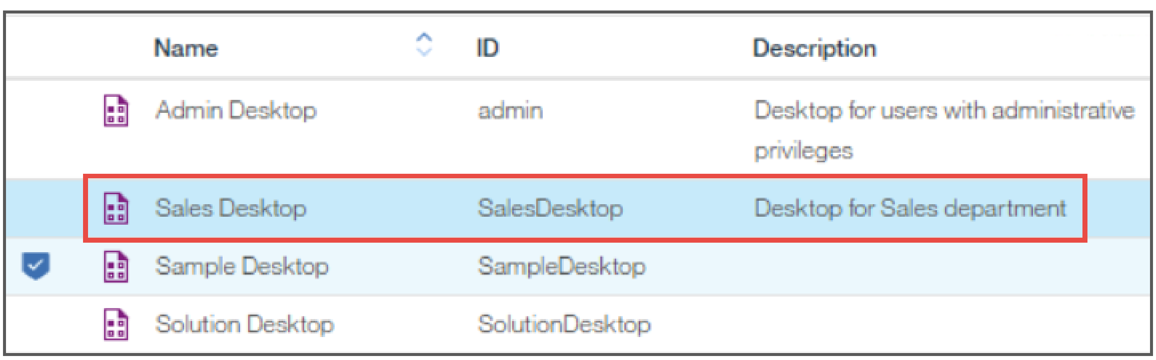
Note

If you have custom toolbars and menus that are already defined, you can select them in the **Menus** tab. Customizing the menus are discussed in another unit.

2.8. Save the configuration and check the new desktop

__ 1. Click **Save and Close** to save the changes and to close the tab.

__ 2. Verify that the new desktop is listed on the **Desktops** tab.



Name	ID	Description
Admin Desktop	admin	Desktop for users with administrative privileges
Sales Desktop	SalesDesktop	Desktop for Sales department
Sample Desktop	SampleDesktop	
Solution Desktop	SolutionDesktop	

__ 3. Log out and close the browser.

__ 4. Open the new desktop in the Firefox browser as an authorized business user:

- **URL**: `http://ecmedu01:9081/navigator/?desktop=SalesDesktop`
- **User name**: `Clara`
- **Password**: `FileNet1`

The desktop opens to the specified default feature view: **Browse**.

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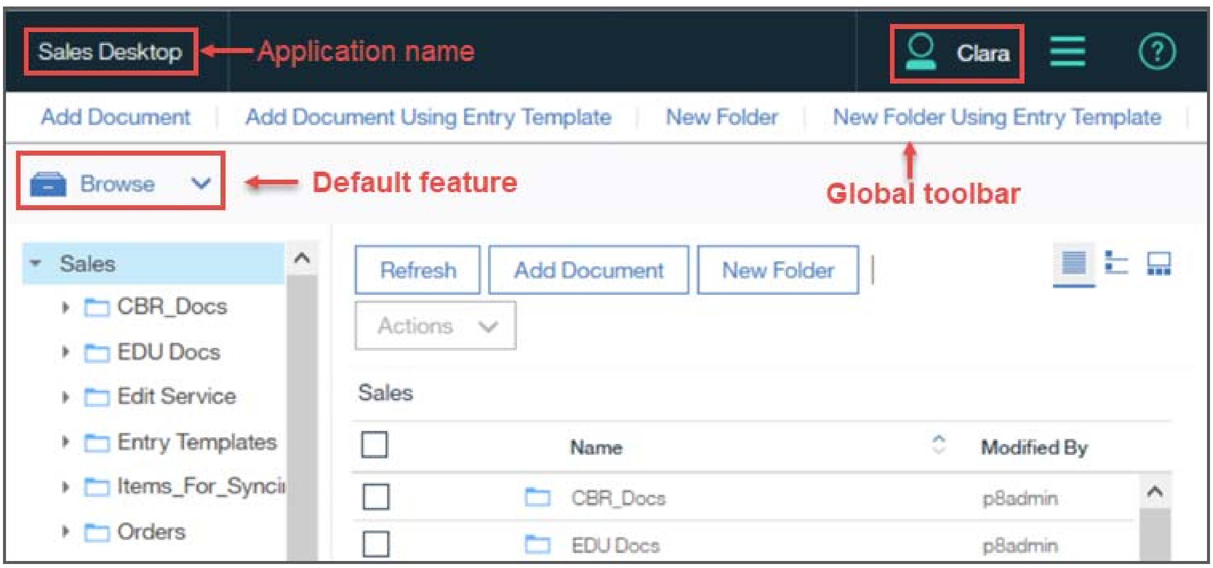
Note

If you set your desktop as the default desktop on the **General** tab > **Additional settings** section, the `http://ecmedu01:9081/navigator/` URL also brings up your desktop.

The **URL** is case-sensitive.

__ 5. Verify that the following desktop settings that you configured are shown:

- Application name on the banner at the top of the page
- Global toolbar
- **Browse** as the default feature
- **Clara** - the currently logged on user and who is authorized to access this desktop



__ 6. Verify that the thumbnail is enabled.

__ a. Open the **Pictures** folder.

__ b. Select one of the documents (Example: **Autumn Tree**).

__ c. Verify that a thumbnail of the document opens in the upper right pane.

__ 7. Log out of IBM Content Navigator.

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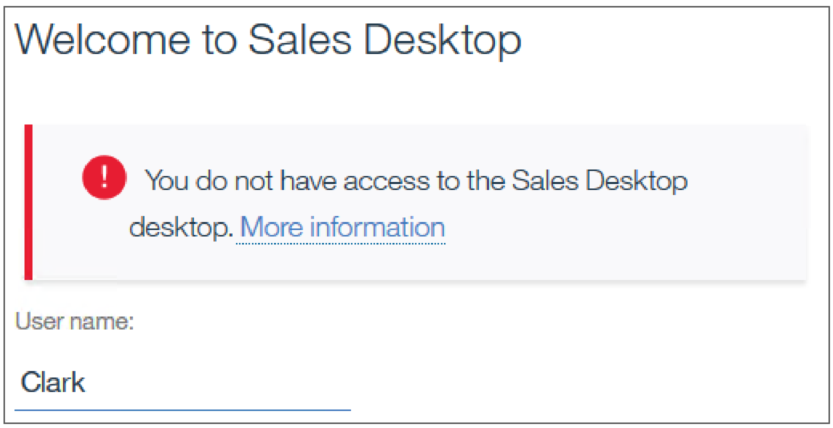
2.9. Verify the desktop security configuration

As discussed before, both Clark and Clara are members of the Clerks security group and are authorized to access the authenticating repository. By specifically giving Sales desktop access to Clara, Clark cannot access the desktop. In this section, you log in as Clark and verify this statement. You also log in as Olivia, who is not authorized to access the repository or the ICN Desktop, to compare the error messages received.

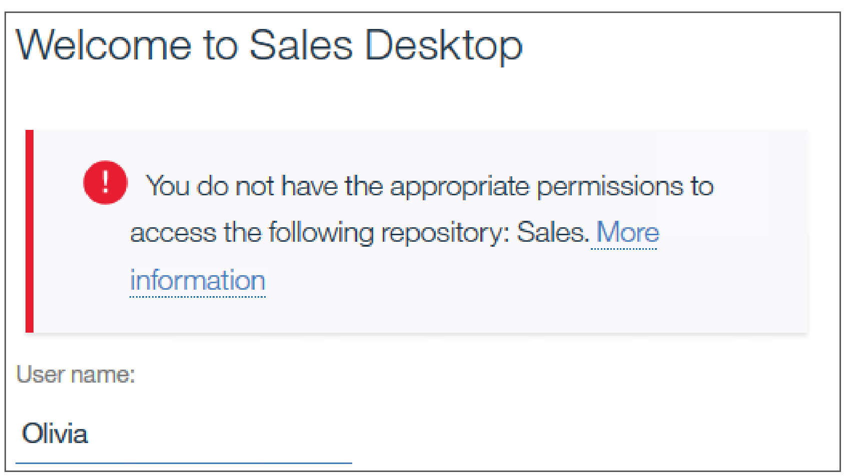
__ 1. Log in as `Clark` (password: `FileNet1`) who does not have access to the desktop.

__ 2. Observe the error message: `You do not have access to the Sales Desktop`.



__ 3. Log in as `Olivia` (password: `FileNet1`) who does not have access to the repository and does not have access to desktop.

__ 4. Check the error message: `You do not have the appropriate permissions to access the following repository: Sales`



__ 5. Close the Browser.

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Section 3. Challenge: Create a desktop

Optional

Complete the following scenario to practice the tasks that you learned in this lesson.

Scenario: Create a Desktop for Loan Department

The Loan Process Department requests a customized desktop for their business users and they provide specifications for their desktop. As their Administrator, you must configure a desktop with their specifications.

Data

Use the data that is provided in the table and configure a desktop.

Item	Value
Operating system (login, password)	`Administrator, FileNet1`
IBM Content Navigator Administrator account (login, password)	`p8admin, FileNet1`
General > **Name of the Desktop**	`Loan Department`
General > **ID of the Desktop** (This value is used to access the desktop)	**LoanDepartment** (No space)
General > **Repository for Authentication**	**LoanProcess**
General > **Select Users** Specific users and groups that have access to this desktop (login, password)	`Olivia, FileNet1` `p8admin, FileNet1`
Repositories > **Selected Repositories**	**LoanProcess, Sales**
Layout > **Default Feature**	**Browse**
Layout > Default repository for **Search** and **Browse**	**LoanProcess**
Appearance > **Application Name**	`Loan Department`

Important

You must log on as `p8admin` to configure the desktop.

After the configuration, log on as `Olivia` to test the desktop.

Use default values for the fields that are not specified in the table.

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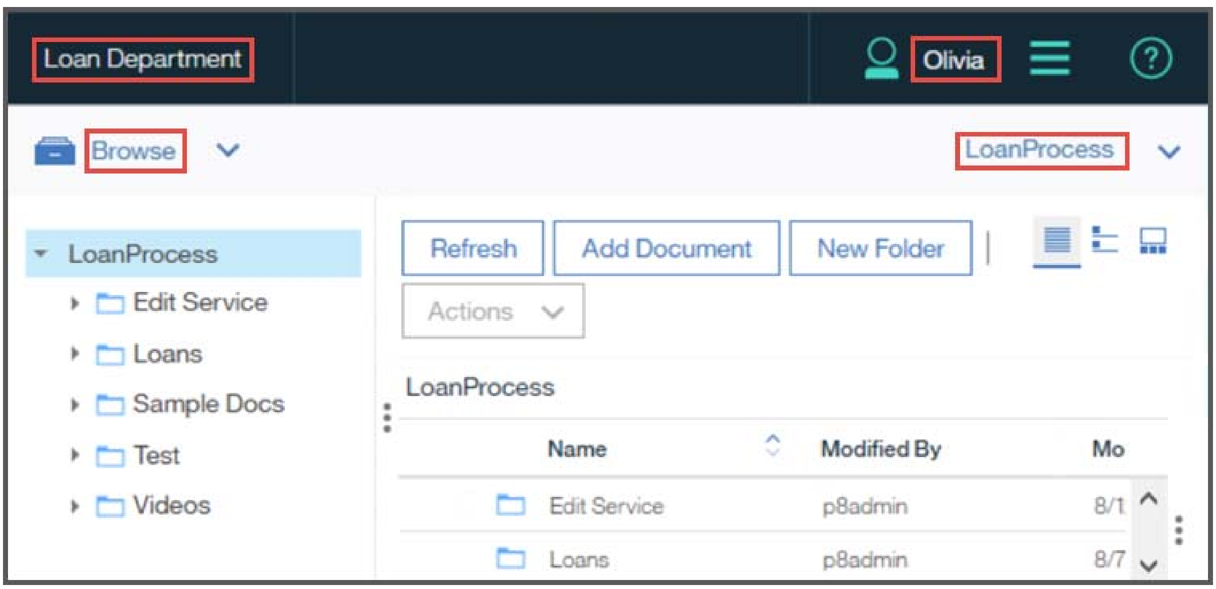
Use the specific **URL** for the new desktop (with its unique ID):
`http://ecmedu01:9081/navigator/?desktop=LoanDepartment`

Verification

__ 1. Log on to the desktop that you created with the **URL**:
`http://ecmedu01:9081/navigator/?desktop=LoanDepartment`

__ 2. Verify that the desktop contains the repositories and other settings that you configured.

- Application name on the banner at the top of the page
- **LoanProcess** as the default repostory
- **Browse** view as the default feature
- User **Olivia** is able to log into the desktop



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Section 4. Find content with a cross-repository search

In this activity, you define a cross-repository search in IBM Content Navigator. You use different IBM FileNet Content Manager repositories for search.

4.1. Enable cross-repository search

By default, the cross-repository search is not enabled for a repository. In this section, you enable it for the repositories that you plan to search.

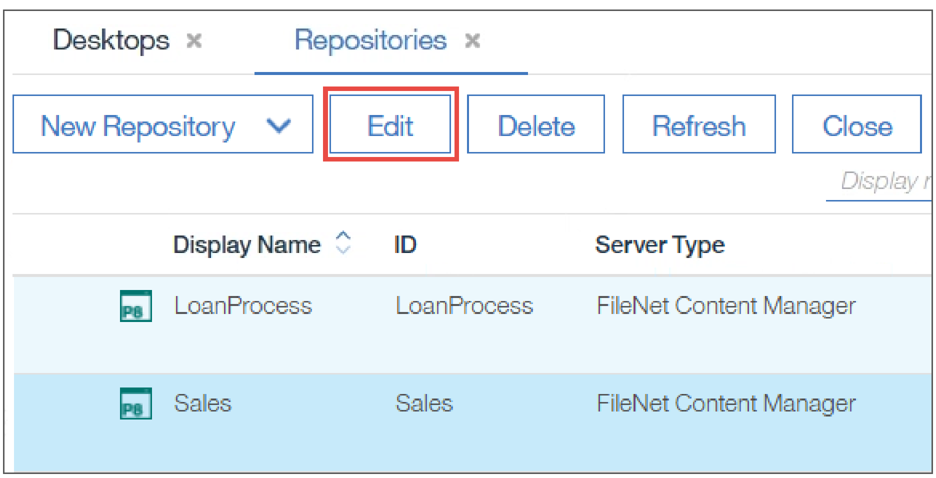
__ 1. In the **Firefox** browser, log in to the IBM Content Navigator administration tool.

- **ICN Admin** shortcut or **URL**: `http://ecmedu01:9081/navigator/?desktop=admin`
- **User name**: `p8admin`
- **Password**: `FileNet1`

__ 2. Connect to a repository.

__ a. On the left pane, click **Repositories**.

__ b. On the **Repositories** tab, select **Sales** repository and click **Edit**.



__ c. From the **Sales** tab, on the **General** subtab, click **Connect**.

__ d. When prompted, enter the administrator user credentials and click **Log In**.

- **User name**: `p8admin`
- **Password**: `FileNet1`

__ 3. Enable cross-repository searches.

__ a. Select the **Search** subtab.

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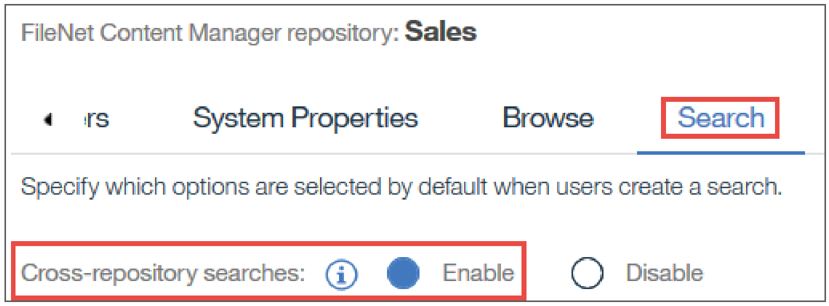
__ b. Verify that **Enable** is selected. If it is not already selected, select **Enable**.



__ c. Click **Save and Close**.

__ 4. Repeat Steps 3 and 4 for the **LoanProcess** repository to verify that the repository is also enabled for **Cross-repository searches**.

__ 5. Log out of IBM Content Navigator and close the browser.

4.2. Specify search scope for a cross-repository search

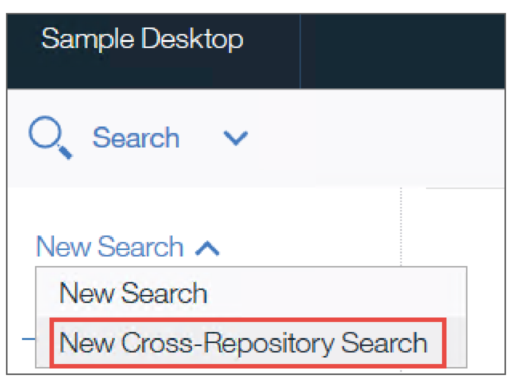
__ 1. In the **Firefox** browser, log in to the IBM Content Navigator Sample Desktop.

- **Sample Desktop** shortcut or URL: `http://ecmedu01:9081/navigator/?desktop=SampleDesktop`
- **User ID**: `p8admin`
- **Password**: `FileNet1`

The Sample Desktop opens to the Browse view with the Sales repository as the default.

__ 2. Click the down arrow next to **Browse** on the upper left and select **Search** to open the **Search** view.

__ 3. Click the down-arrow that is next to **New Search** and then select **New Cross-Repository Search** from the list.



The **New Cross-Repository Search** tab opens in the right pane.

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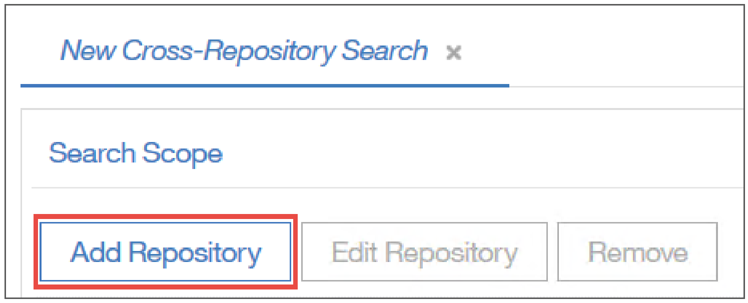
__ 4. In the **Search Scope** section, click **Add Repository**.



__ 5. On the **Add Repository** dialog box, do the following steps.

__ a. Select **Sales** from the **Repository** list.

__ b. Leave the default **\Sales(Including subfolders)** for the **Search in** field.

You can narrow the scope to a specific folder and its subfolders to increase the performance.

__ c. For the **Class** field, click the down arrow and select **Orders** from the list.

__ d. Notice that the **Include subclasses** option is selected.

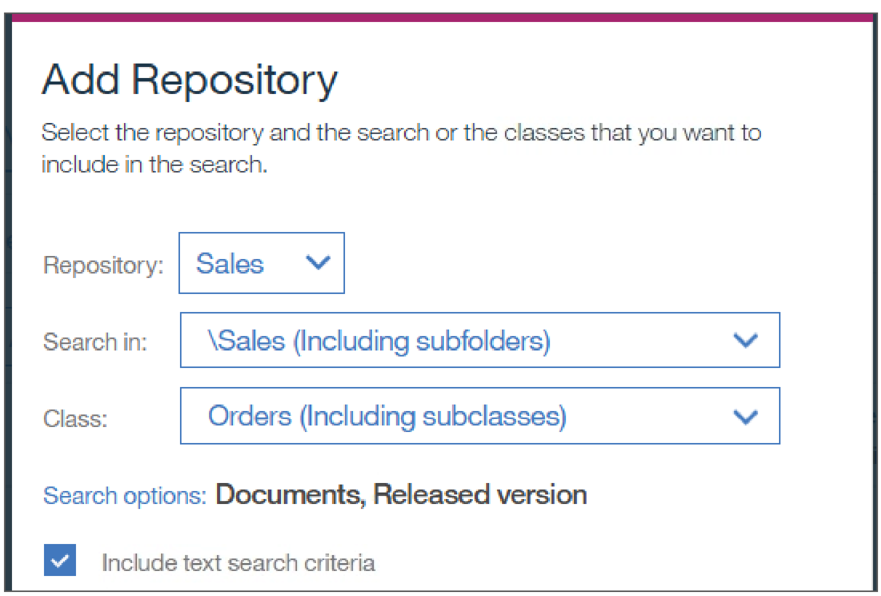
You can also select the **Search in multiple classes** option.

__ e. Click **OK**.

__ f. Leave the default **search options**: **Documents, Released Version**

If these values are not already selected, click the **Search options** link to select them.

__ g. Select the **Include text search criteria** option.



__ h. Click **OK** to include the repository in the Search Scope.

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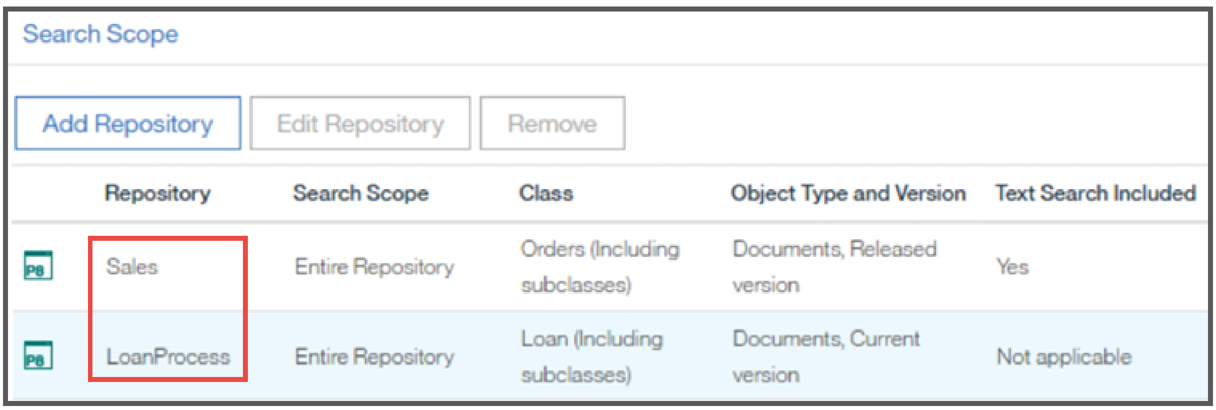
__ 6. Repeat Steps 4-5 and use the data in the following table to add another repository.

Property	Value
Repository	LoanProcess
Search in	\LoanProcess (Including subfolders)
Class	Loan (Including subclasses)
Search Options	Documents, Current version

__ 7. On the **Search** view, verify that both the repositories are added under the **Search Scope**.



Note

On the student system, the **Sales** repository is configured for text-based search and the **LoanProcess** repository is not configured. Therefore, the option to include text search criteria is not available for **LoanProcess** and the column value shows as **Not applicable**.

4.3. Add mapping

__ 1. Click **Add Mapping** that is below the repository list.

__ 2. On the **New Mapping** dialog box, **Sales** is already selected for the repository.

__ 3. Type `Price` in the **Name contains** field to filter the properties.

__ 4. Click the forward arrow to move **Price** from the **Available Properties** pane to the **Mapped Properties** pane.

__ 5. Notice that the property is listed with the repository name: **Price (Sales)**

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Note

In a single mapping, you can select one property only for each repository. If you try to move another property from **Available Properties** to **Mapped Properties** for the same repository, you receive an error.

__ 6. On the **New Mapping** dialog box, select the **LoanProcess** repository from the list.

__ 7. If you are prompted to log in, enter `p8admin` for user name and `FileNet1` for password.

__ 8. Move **Loan Fee** from the **Available Properties** pane to the **Mapped Properties** pane.

__ 9. Notice that the property is listed with the repository name: **Loan Fee (LoanProcess)**

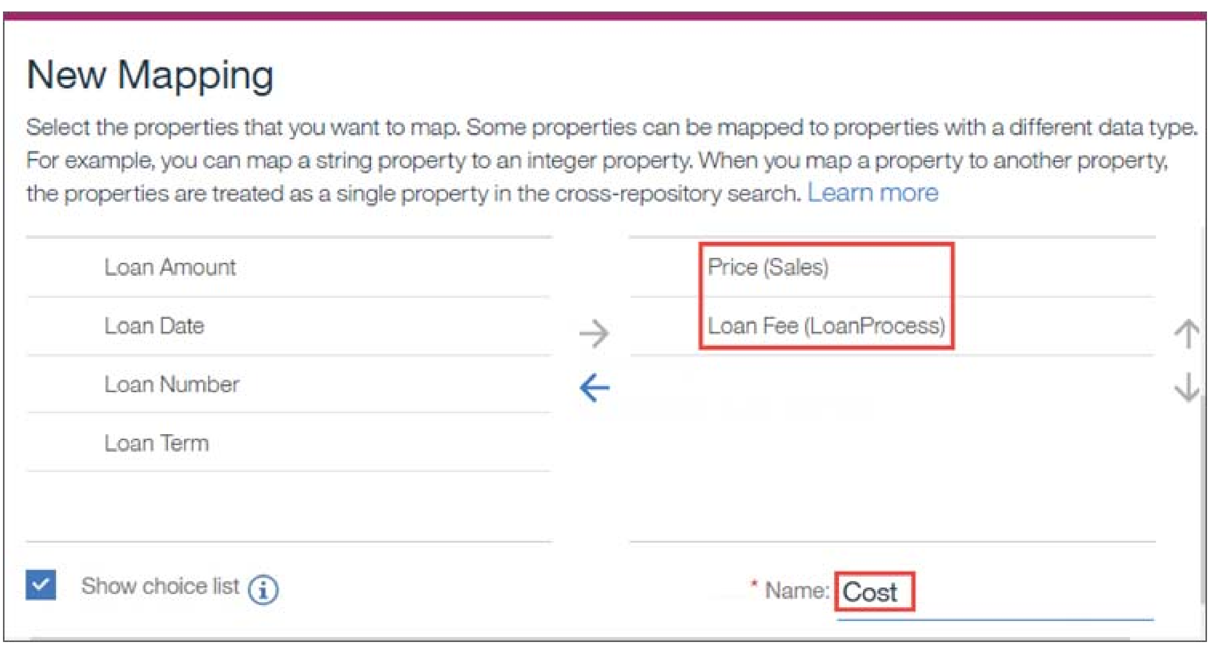
Note

Data type and cardinality of the selected properties must match. If you try to add a property of a different data type, you receive an error.

Hover over a property (mouse over) to see its data type.

__ 10. Scroll down the **Name** field and type `Cost`.

The word **Cost** is the common mapping name for both properties selected.



__ 11. Click **OK** and verify that the mapping that you created is listed.

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Hint

If the mapping is not visible, use the browser zoom out feature.

From the browser toolbar, click **View** > **Zoom** > **Zoom Out** to see the complete graphic user interface (GUI).

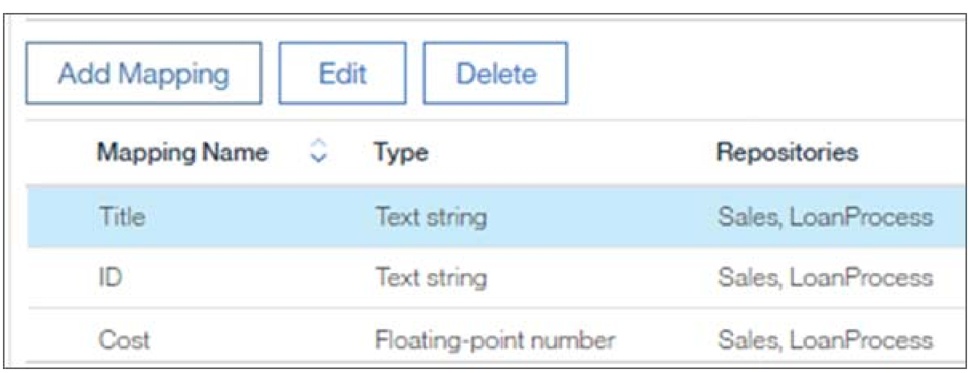
__ 12. Repeat Steps 1-11 and use the data in the following table to add another mapping.

Item	**Value**
Repository - 1	**Sales**
Sales repository property	**Customer ID**
Repository - 2	**LoanProcess**
LoanProcess repository property	**Loan Number**
Common name for both properties	`ID`

__ 13. Repeat Steps 1-11 and use the data in the following table to add a third mapping.

Item	**Value**
Repository - 1	**Sales**
Sales repository property	**Document Title**
Repository - 2	**LoanProcess**
LoanProcess repository property	**Document Title**
Common name for both properties	`Title`

__ 14. Verify that the mappings are listed on the **New Cross-Repository Search** tab.



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4.4. Enter search criteria and run the search

__ 1. On the **New Cross-Repository Search** tab, scroll down and click **Search** on the lower left corner of the page.

__ 2. In the **Search Criteria** section, select **Cost**.

__ 3. Change Equals to **Less Than** for the middle field and type `5000`.

__ 4. Click **Add Property** to add ID is Not Empty.

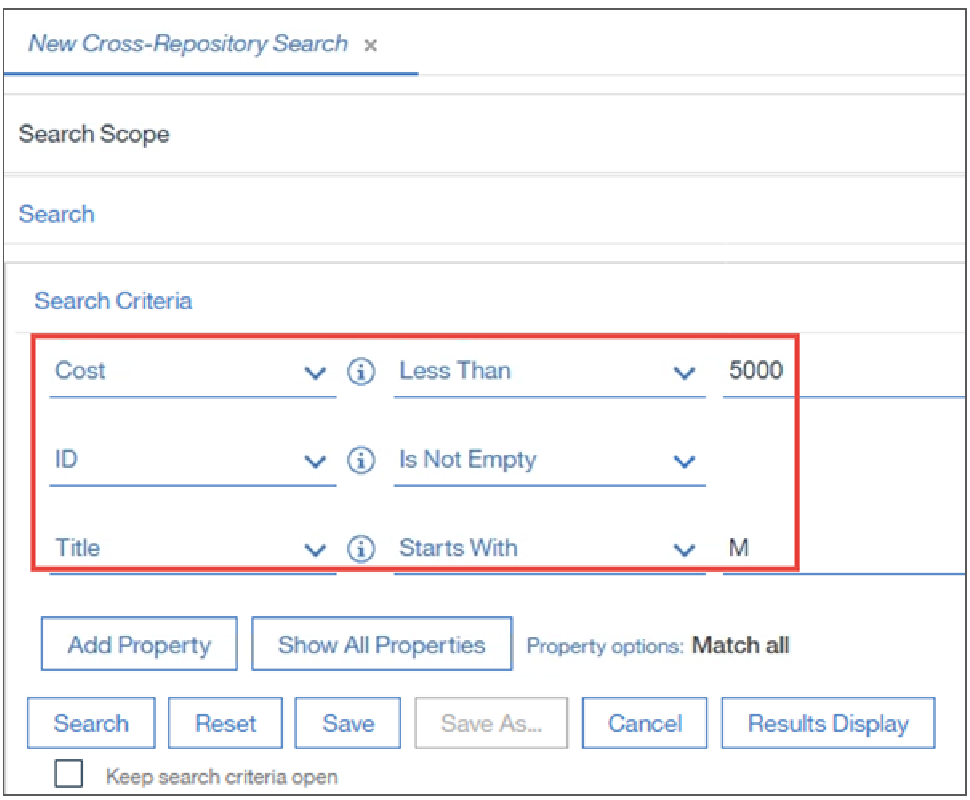
  __ a. Select **ID**.

  __ b. Change Starts with to **Is Not Empty**.

__ 5. Click **Add Property** to add Title Starts With M.

  __ a. Select **Title**, **Starts with** and type `M`.

  __ b. The value **M** is case-sensitive, enter the letter in uppercase.



__ 6. Configure the Results Display.

  __ a. Click **Results Display** (below the search criteria).

  __ b. From the **Search Results Display** dialog box, verify that **Title**, **ID**, and **Cost** are listed on the **Selected** pane in that order.

  If needed, use the upward and downward arrows to change the order.

  __ c. Select **Class** from the Available pane and move it to the **Selected** pane.

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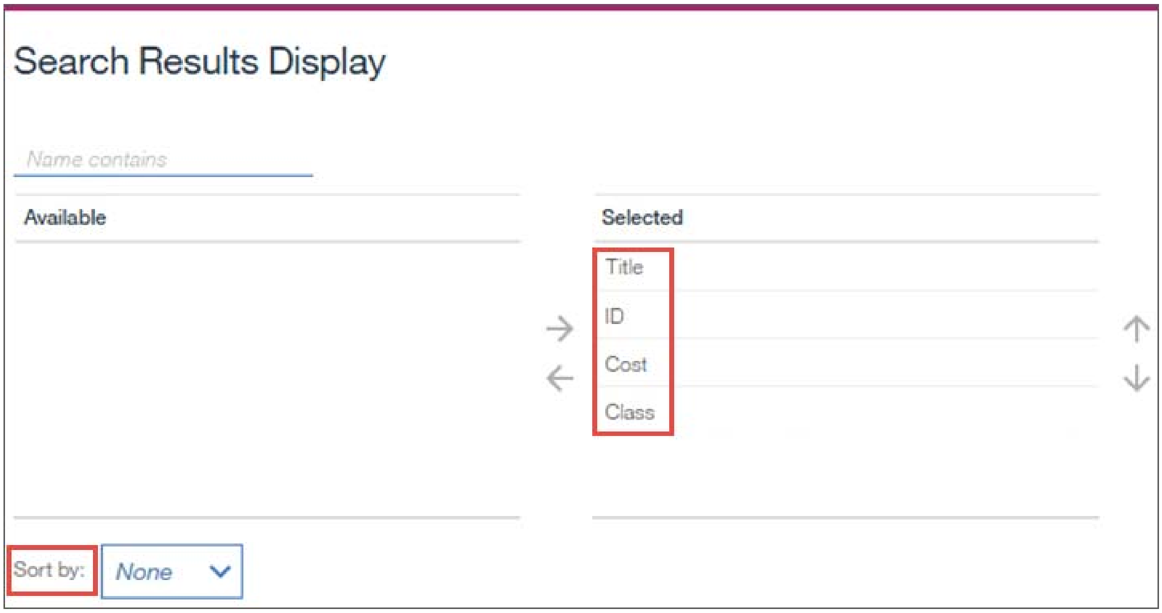
__ d. If any of the properties (**Title**, **ID**, and **Cost)** are not listed, move the properties to the Selected pane.

You can also select a property as the sort key.

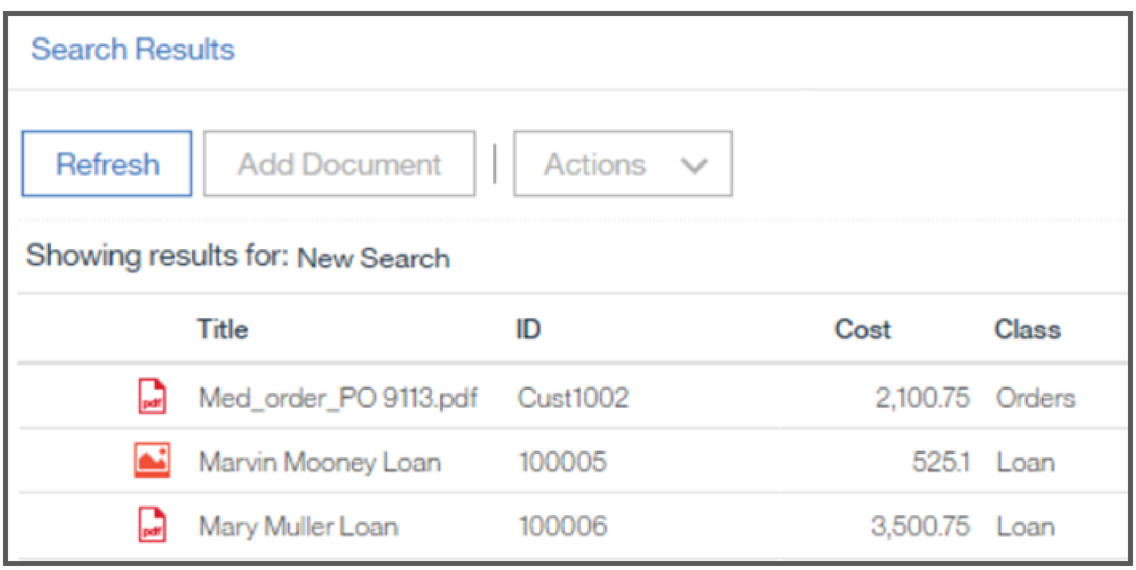


__ e. Click **OK**.

__ 7. Run the Search.

__ a. On the **New Cross-Repository Search** tab, click the **Search** button.

The **Search Results** shows a list of documents based on the criteria that you defined.



__ b. Verify the search results for the following information:

- The result set contains documents from both repositories

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- The **Orders** class documents are from the **Sales** repository and the **Loan** class documents are from **LoanProcess** repository.
- The title for the documents start with **M**
- The **ID** property of each document has a value
- The value for the **Cost** property is below **5000**

Hint

Optionally, change the criteria and run the search again. Depending on the values you choose, some searches might not return any documents.

You can check the property values for the documents on the **Sales** (**Orders** folder) and **LoanProcess** (**Loans** folder) repositories and select the values for the search.

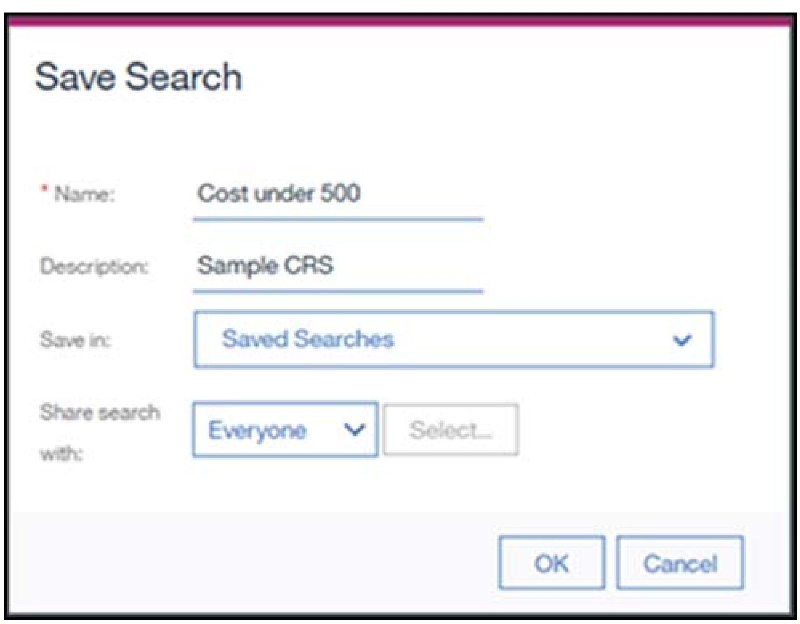
__ c. Right-click a document in the search results and observe the options available in the menu.

__ 8. Save the Search.

__ a. Click **Search Criteria** and then click **Save**.

__ b. On the **Save Search** dialog box, enter the values in the following table:

Item	Value
Name	`Cost under 500`
Description	`Sample CRS`
Folder for **Save in**	**Sales > Saved Searches**
Share search with	**Everyone**



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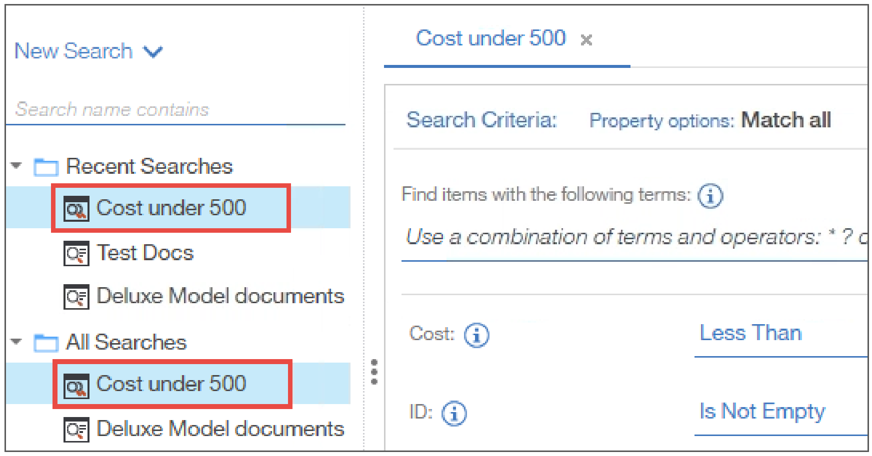
__ c. Click **OK**.

__ d. Verify that your search is listed in the **Recent Searches** and **All Searches** folders on the left pane and the search has the Cross-repository search  icon.



9. Log out of IBM Content Navigator and close the browser.

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Section 5. Configure teamspace management

In this section of the exercise, you configure teamspace management for repositories and desktops.

5.1. Configure teamspace management for a repository

__ 1. In the **Firefox** browser, log in to the IBM Content Navigator administration tool.

- **ICN Admin** shortcut or **URL**: `http://ecmedu01:9081/navigator/?desktop=admin`
- **User name**: `p8admin`
- **Password**: `FileNet1`

__ 2. Click **Repositories** in the left pane.

__ 3. On the **Repositories** tab on the right pane, select the **Sales** repository and click **Edit**.

__ 4. On the **General** subtab, click **Connect** and when prompted, log in to the repository:

- **User ID**: `p8admin`
- **Password**: `FileNet1`

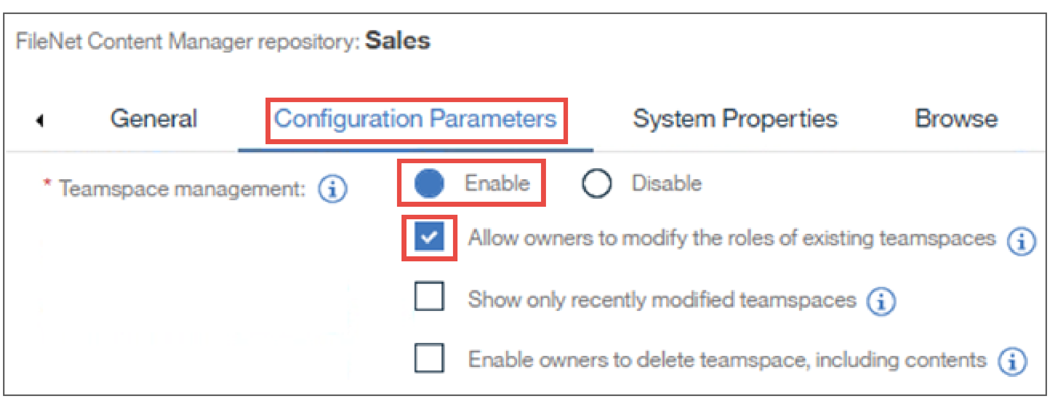
__ 5. From the **Configuration Parameters** subtab, scroll down to the **Optional Features** section.

__ 6. Select **Enable** for the **Teamspace management** field.

__ 7. Select the **Allow owners to modify the roles of existing teamspaces** option.

__ 8. Notice the other available options:

- **Show only recently modified teamspaces**
- **Enable owners to delete teamspace, including contents**



__ 9. Click **Save** to save the changes.

__ 10. For the **Assign teamspace template creators** section, verify the groups that are assigned as creators: **Clerks** and **Managers**.

You can remove the existing users and groups or add more users and groups.

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The users and groups that are defined for the **creators** have access to create teamspace templates.

__ 11. For the **Assign teamspace roles** section, verify the users and groups that are assigned as creators: **Clerks** and **Managers.**

__ 12. Click **X** next to **Managers** to remove this group from **Creators**.

__ 13. Add the Managers group as the Users.

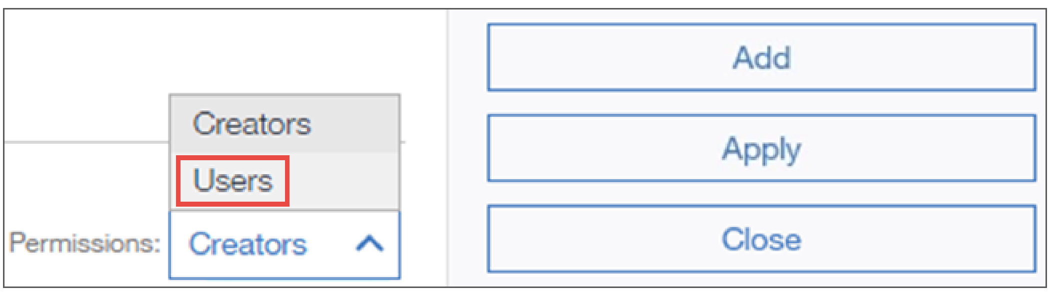
__ a. Click **Select Users and Groups**.

The **Add Users and Groups** page opens.

__ b. In the **Search for** field, select **Groups**.

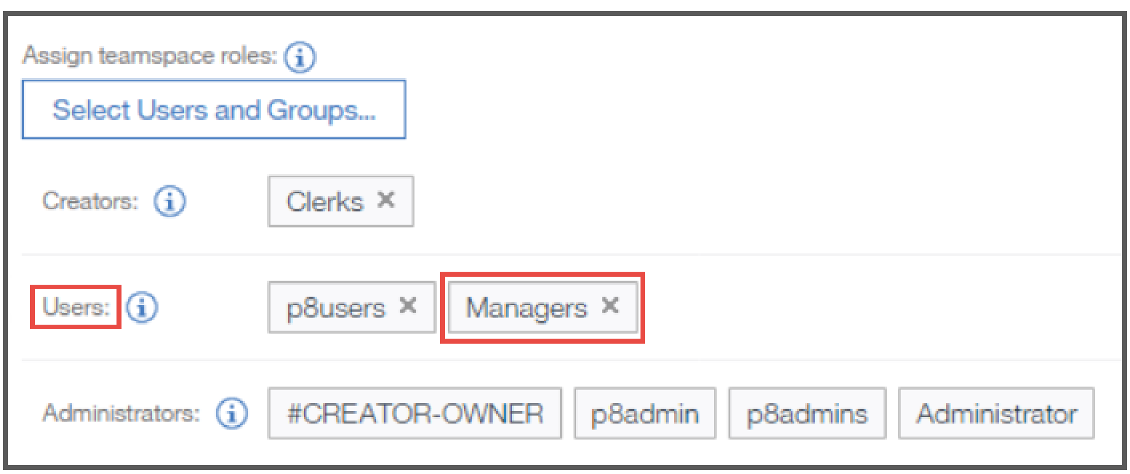
__ c. Search for **Managers** and then click the forward arrow to move the group from the **Available** pane to the **Selected** pane.

__ d. For the **Permissions** field (at the end of the page), select **Users.**



__ e. Click **Add.**

__ f. On the **Configuration Parameters** tab, verify that **Managers** is added to the **Users** list.



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Note

Observe the list of administrators for teamspace template and teamspace. The groups are assigned on the repository and they have full control permissions on the repository.

You cannot change the list from the IBM Content Navigator administration tool.

__ 14. Click **Save and Close** to save the changes to the repository.

__ 15. Close the **Repositories** tab.

__ 16. Leave IBM Content Navigator open for the next section.

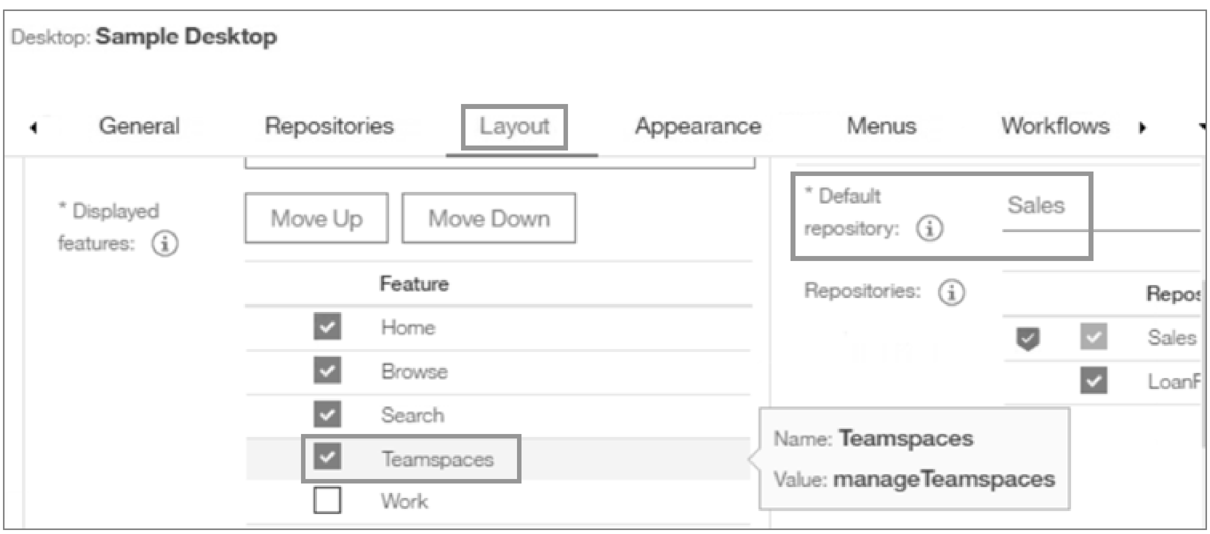
5.2. Add the teamspaces feature to a desktop

__ 1. In the administration desktop, from the **Desktops** tab, select **Sample Desktop** and click **Edit**.

__ 2. From the **Sample Desktop** tab, click the **Layout** subtab.

__ 3. On the **Layout** tab, select **Teamspaces** from the **Feature** list.

__ 4. On the right pane, select **Sales** for the **Default repository** field.



__ 5. Click **Save and Close** to save the changes to the desktop.

__ 6. Click **Close** on the **Information** dialog box when you are prompted to refresh the browser.

__ 7. Log out of IBM Content Navigator and close the browser.

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Section 6. Create a teamspace template

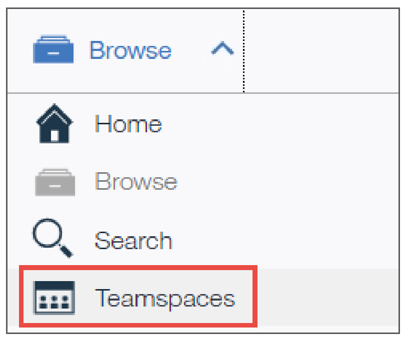
In this section of the exercise, you create a teamspace template. In the next section, you use this template to create a teamspace.

6.1. Create a teamspace template

__ 1. Open the Firefox browser and log in to the IBM Content Navigator Sample Desktop.

- **Sample Desktop** shortcut or **URL**: `http://ecmedu01:9081/navigator/?desktop=SampleDesktop`
- **User name**: `p8admin`
- **Password**: `FileNet1`

__ 2. Click the down arrow next to **Browse** and select **Teamspaces**.



The **Teamspaces** view opens.

__ 3. Click the **Templates** tab and notice that the existing templates are listed.

__ 4. Click **New Template**.

The **Teamspace Template Builder** page opens.

6.2. Define teamspace template

__ 1. On the **Teamspace Template Builder** page, type a name for the template: `SalesTSTemplate`

__ 2. Enter a description for the teamspace template.

__ 3. Define users and groups to share the template.

__ a. In the **Share template with** list, select **Specific users and groups**.

__ b. On the **Add Users and Groups** dialog box, select **Groups** in the **Search for** list.

__ c. Type the first few letters of `p8admins` group in the search field and click the search icon.

__ d. Move the group from the **Available** pane to the **Selected** pane.

__ e. Repeat the steps to add the **Managers** group.

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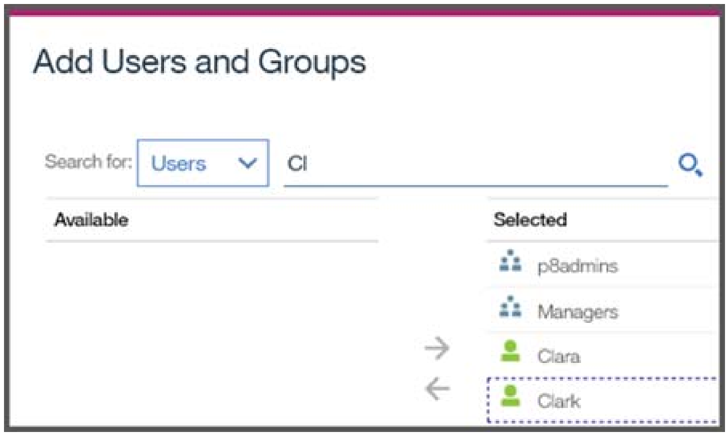
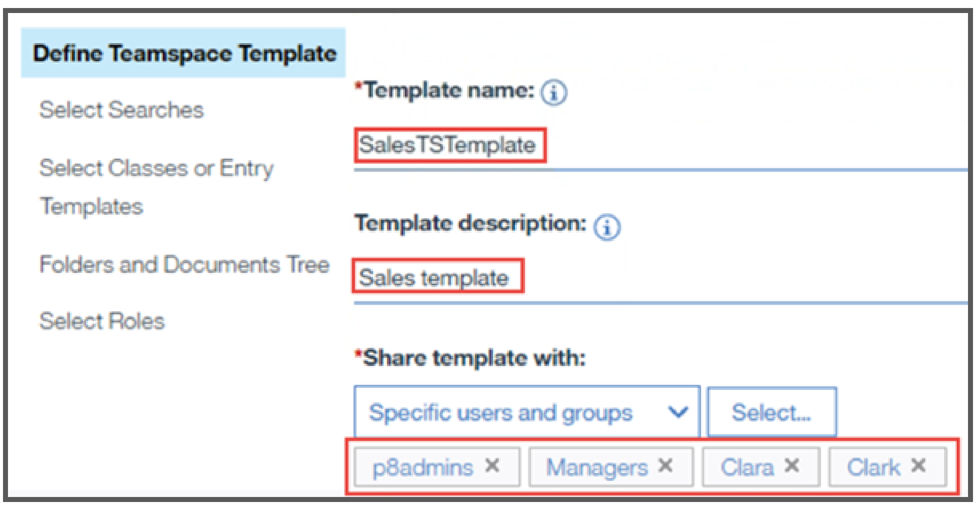
__ f. Select **Users** from the **Search for** list and add **Clara** and **Clark**.



__ g. Click **Add** to add the users and close the window.

__ 4. On the **Teamspace Template Builder** page, verify that the specified users are listed.



6.3. Select searches

__ 1. On the **Teamspace Template Builder** page, click **Next**.

Note

On the Select Searches page, observe that Select Searches is highlighted on the left pane.

You can also click Select Searches from the left pane to go to the page. After you enter a name for a template on the Define Teamspace Template page, you can do the other steps in any order.

__ 2. Scroll down to the **Available searches** pane and select **Searches for Teamspace**.

__ 3. Click **Add** to move the search to the **Selected searches** pane.

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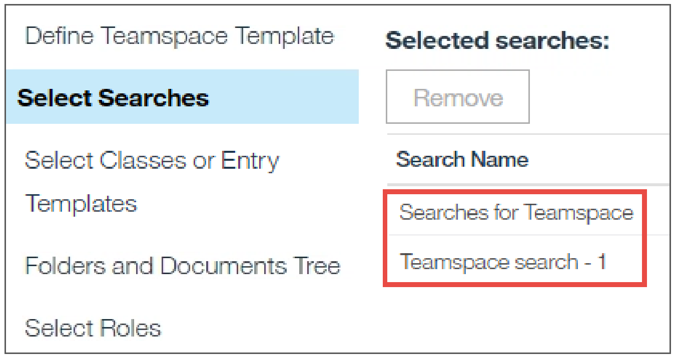
__ 4. Repeat the step to add **Teamspace search - 1**.



Note

Two searches that are named **Searches for Teamspace** and **Teamspace search - 1** are already created on the student system.

You can choose any saved searches or create a search and add it to the template. You can add multiple searches.

__ 5. Click **Next**.

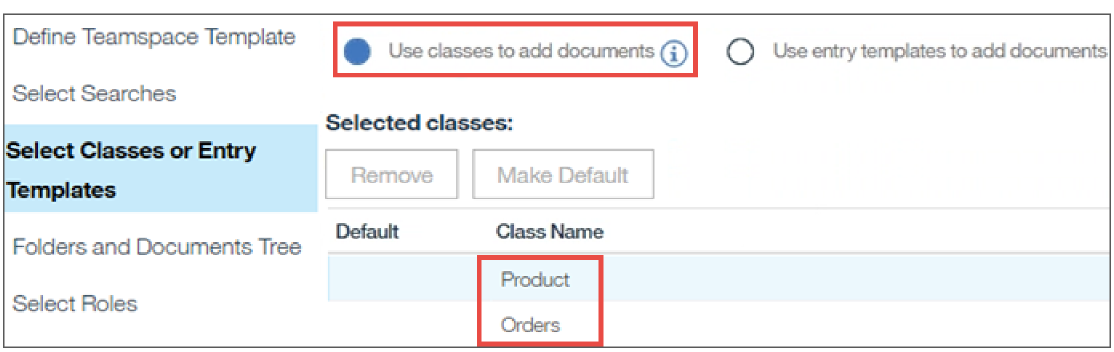
6.4. Select classes or entry templates

__ 1. Select the **Use classes to add documents** option.

__ 2. Scroll down to the **Available classes** pane and select **Product** and **Orders.**

__ 3. Click **Add**.

The classes are added to the **Selected classes** pane.



__ 4. Click **Next**.

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6.5. Include folders and documents

__ 1. On the **Folders and Documents Tree** page, click **New Folder**.

The **New Folder** window opens. In the **Properties** section, **Folder** is already selected for the **Class** field.

__ 2. In the **Folder Name** field, type `Product Info` and click **Add** on the lower right.

The folder is added to the template.

Note

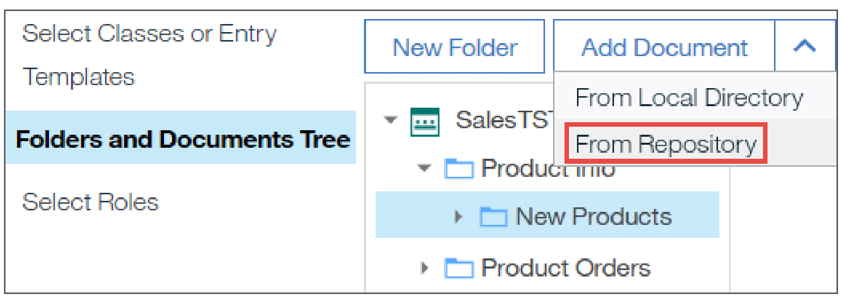
You can add as many folders and subfolders as you need. To add a subfolder under another folder, select a folder, then click **New Folder**, and repeat the steps.

Users of the teamspace with appropriate permissions can also add folders.

__ 3. Select the **SalesTSTemplate** node and add another folder with the name: **Product Orders**

__ 4. Select the **Product Info** folder and add a subfolder with the name: **New Products**

__ 5. Select the **New Products** subfolder and click the down-arrow next to **Add Document** and click **From Repository**.



On the **Select Item** page, the current repository **Sales** is automatically selected for the **Search in** field.

You can narrow the search by specifying a subfolder within the repository.

__ 6. Select the **Product** document class from the **Class** list.

__ 7. To refine the search with property-based search criteria, select **Document Title** and **Starts with** and type `Deluxe`.

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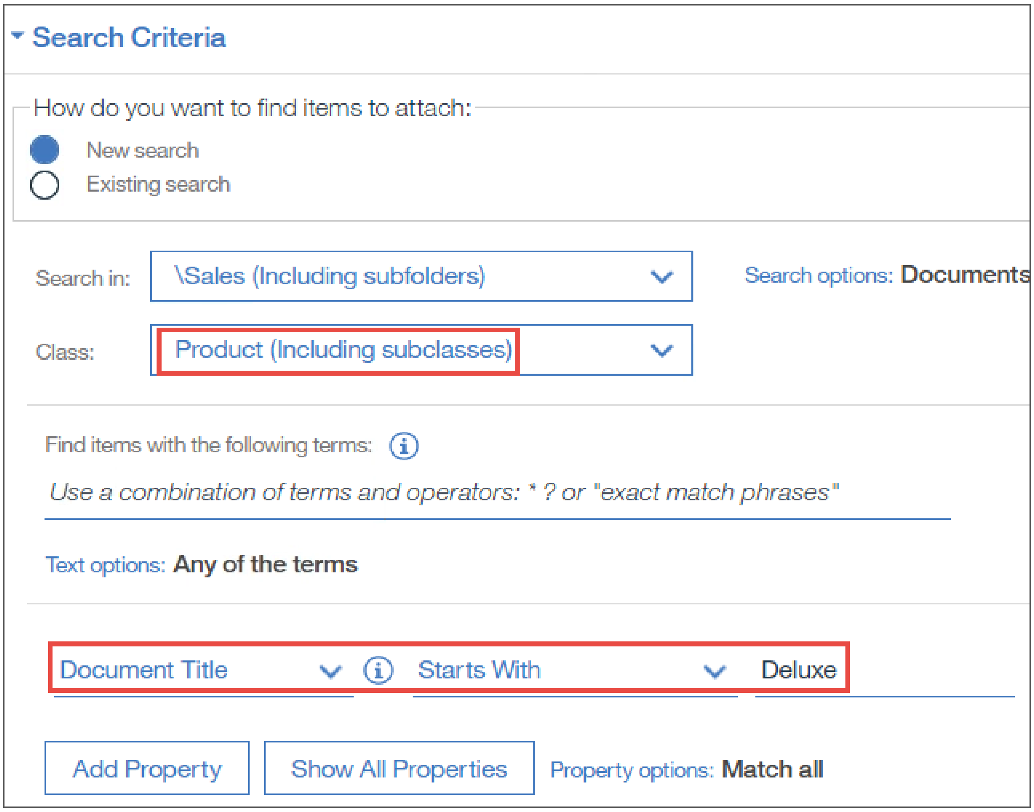


__ 8. Scroll down and then click **Search**.

Several documents are returned in the search results. Observe that the document titles start with **Deluxe** which is the criteria that you selected.

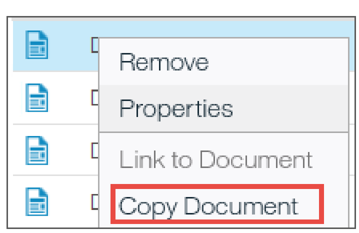
__ 9. Select all documents from the **Search Results** pane (select a document and press **Ctrl+A**) and then click **OK**.

__ 10. On the **Folders and Documents Tree** page, verify that the documents are listed under the **New Products** folder in the template and then click **Next**.

Information

You can specify whether you want a copy of the document to be added to each teamspace created from this template or a reference (link) to the original document in the repository to be included.

The default behavior is to link to the original document. You can right-click a document and select **Copy Document** from the menu to change the option.



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6.6. Select roles

__ 1. On the **Select Roles** page, verify that the **Owner** role is automatically added, and it cannot be removed.

Each teamspace template must have at least one owner.

__ 2. Select the **Owner** role, and observe the permissions for this role on the right pane.

Hint

From the browser toolbar, click **View** > **Zoom** > **Zoom Out** to see the complete graphic user interface (GUI).

__ 3. Scroll down and from the **Available roles** section, select **Reviewer**.

__ a. Click **Add** to add it to the **Selected roles** pane.

The **Description** column indicates the permissions for each role.

__ b. To edit the name, select the **Reviewer** role name and click **Edit**.

__ c. Edit the name from **Reviewer** to `Supervisor` and click **OK**.

__ 4. To edit the permissions, under the **Teamspace permissions** section on the right pane, select the following items:

- **Add searches**
- **Manage teamspace users**

When you select this option, all other items are selected.

__ 5. Repeat steps **2** and **3** to add the **Member** Role and rename it as **Sellers**.

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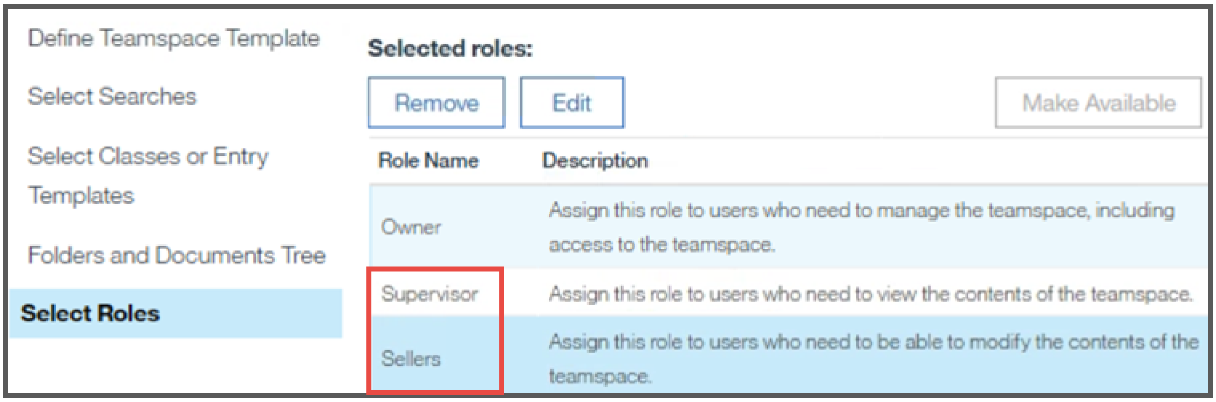
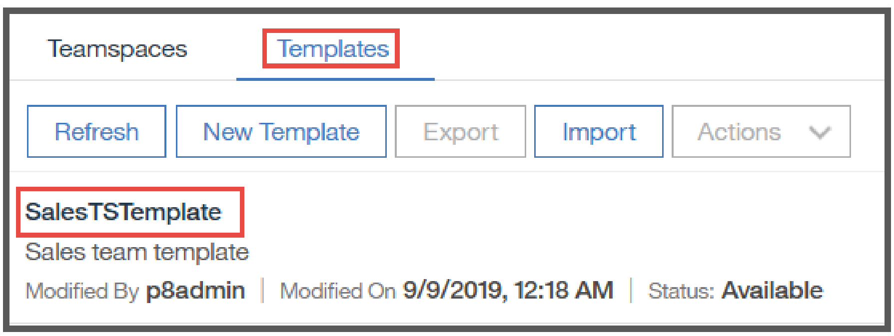


6.7. Complete the wizard and check the template

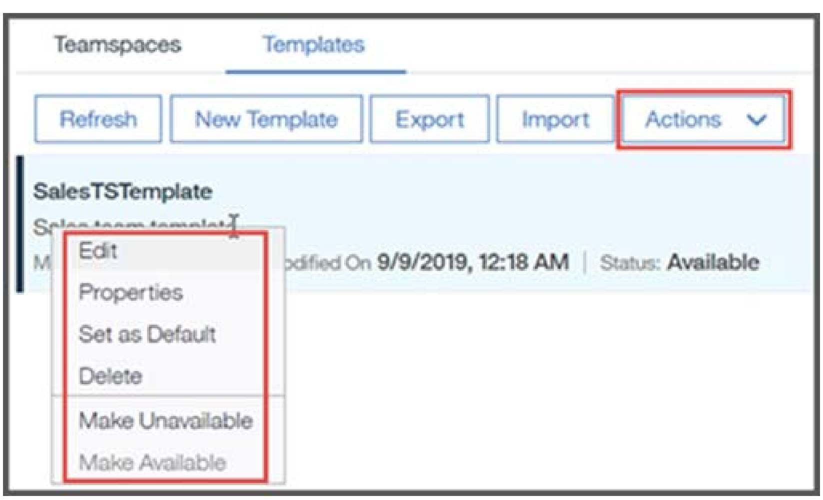
__ 1. Click **Finish** from the top toolbar to complete the template wizard.

The new template is listed in the Templates tab.



__ 2. Right-click template to observe the actions available.

You can set this template as the default, edit it, delete it, or temporarily make it unavailable to other users. You can also use the **Actions** menu list to select an action.



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__ 3. Right-click the template and select **Properties** from the list.

__ a. Observe the options to change the name or the security.

__ b. Click **Cancel** on the lower right.

__ 4. Leave IBM Content Navigator open for the next activity.

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Section 7. Create a teamspace

In this activity, you create a teamspace in IBM Content Navigator with the template that you created in the previous section.

7.1. Create a teamspace

__ 1. If you are already on the **Teamspaces** view, skip steps 2 and 3.

__ 2. In the **Firefox** browser, log in to the IBM Content Navigator Sample Desktop.

- **Sample Desktop** shortcut or **URL**: `http://ecmedu01:9081/navigator/?desktop=SampleDesktop`
- **User name**: `p8admin`
- **Password**: `FileNet1`

__ 3. Click the down arrow next to **Browse** and select **Teamspaces**.

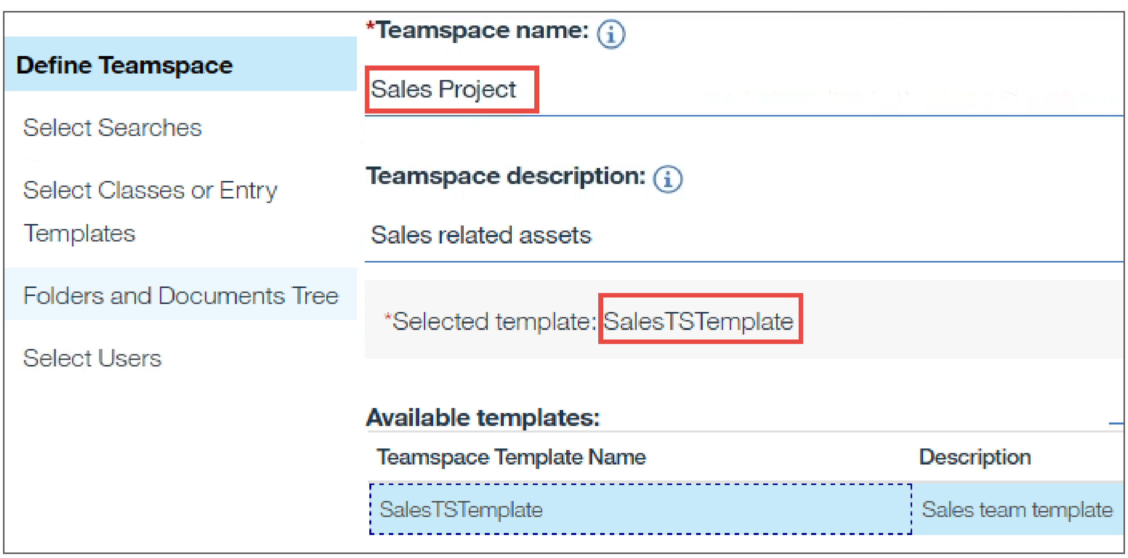
__ 4. On the **Teamspaces** view, click **New Teamspace**.

The Teamspace Builder page opens.

__ 5. On the **Define Teamspace** page, for **Teamspace name**, enter `Sales Project`.

__ 6. For **Teamspace description**, enter `Sales related assets`.

__ 7. Scroll down and from the **Available templates** list, select the teamspace template **SalesTSTemplate** that you created.



__ 8. Observe that the **Selected template** field is populated with the template name.

__ 9. From the left, click **Select Searches**.

__ a. Notice that **Searches for Teamspace** and **Teamspace search - 1** that you added to your template are listed.

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__ b. Leave the default searches and click **Next**.

Note

You can select more searches from the **Available searches** pane or remove the searches that you don't need from the **Selected searches** pane. You can also create a new search and add it to the teamspace.

When you create a teamspace from a template, you can accept all the defaults in the template or modify them.

__ 10. For **Select Classes or Entry Templates**, leave the default classes **Product** and **Orders** that come from the template and click **Next**.

Note

You can select more classes from the **Available classes** pane. You can also remove classes that you do not require from the **Selected classes** pane.

__ 11. On the **Folders and Documents Tree** page, leave the default folders and documents and click **Next**.

Note

You can create more folders or delete folders. You can also add or unfile documents to this teamspace.

__ 12. For **Select Users**, add users and groups.

__ a. On the **User and Group** list, verify that **p8admin** is already added as owner for this teamspace.

__ b. Click **Add Users and Groups**.

__ c. On the **Add Users and Groups** page, set **Search for** to **Users**, type `cl` and search.

__ d. Select **Clara** and **Clark** and move the users to the **Selected** pane.

__ e. Set **Roles** to **Sellers** on the lower right and click **Apply**.

__ f. Set **Search for** to **Groups** and search for `Managers`.

__ g. Set **Roles** to **Supervisor** and click **Add**.

__ 13. Verify that the team members that you added are listed in the **Teamspace Builder** page.

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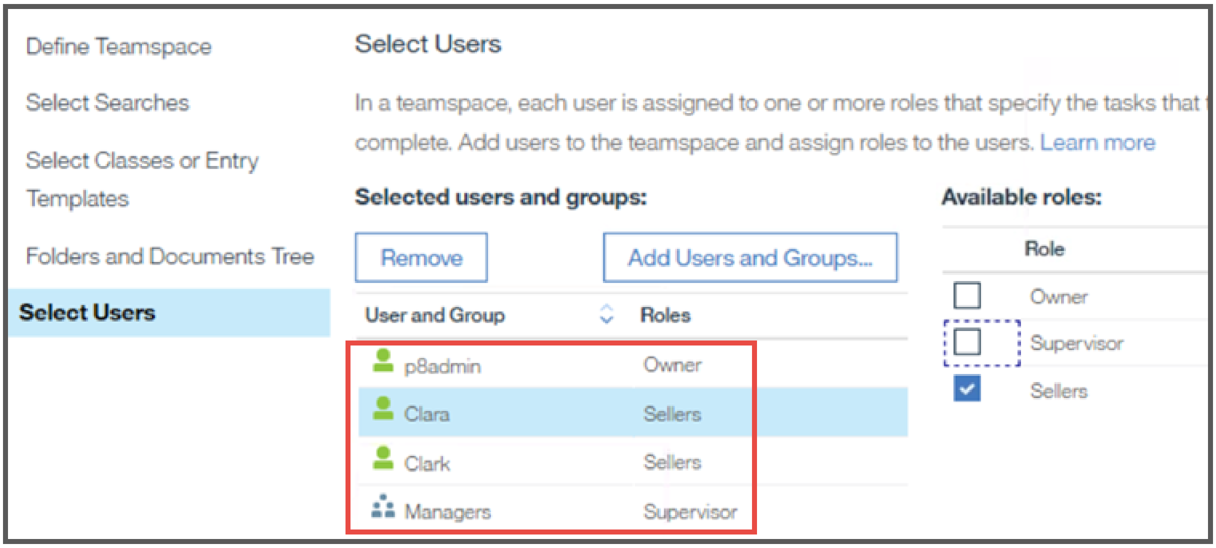


14. Click **Finish**.

Hint

If the **Role** name is not correct, select the user and then select the correct role from the **Available roles** on the right pane.

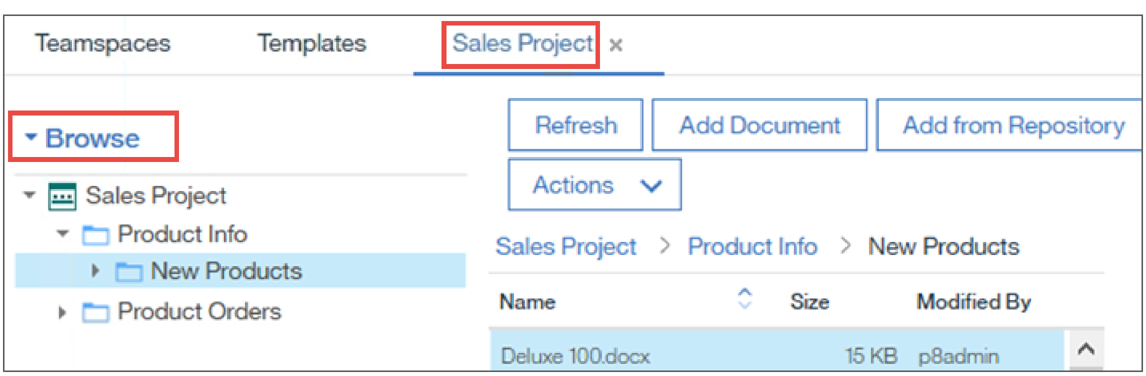
7.2. Verify the new teamspace

__ 1. On the **Teamspaces** view, verify that the new teamspace **Sales Project** that you created is listed on the **Teamspaces** tab.

__ 2. If the **Sales Project** tab is not already opened, from the **Teamspaces** tab, click it to open.

__ 3. Browse the folders and documents.

__ a. Expand **Sales Project** > **Product Info** > **New Products**.



__ b. Right-click a document and select **Preview** to view the documents in the **Viewer**.

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Note

The **Browse** and **Search** features on the teamspace are the same as the Browse and Search views that you used earlier.

__ 4. Search the documents:

__ a. From the left pane, expand **Search** > **All Searches** to view the searches that are available.

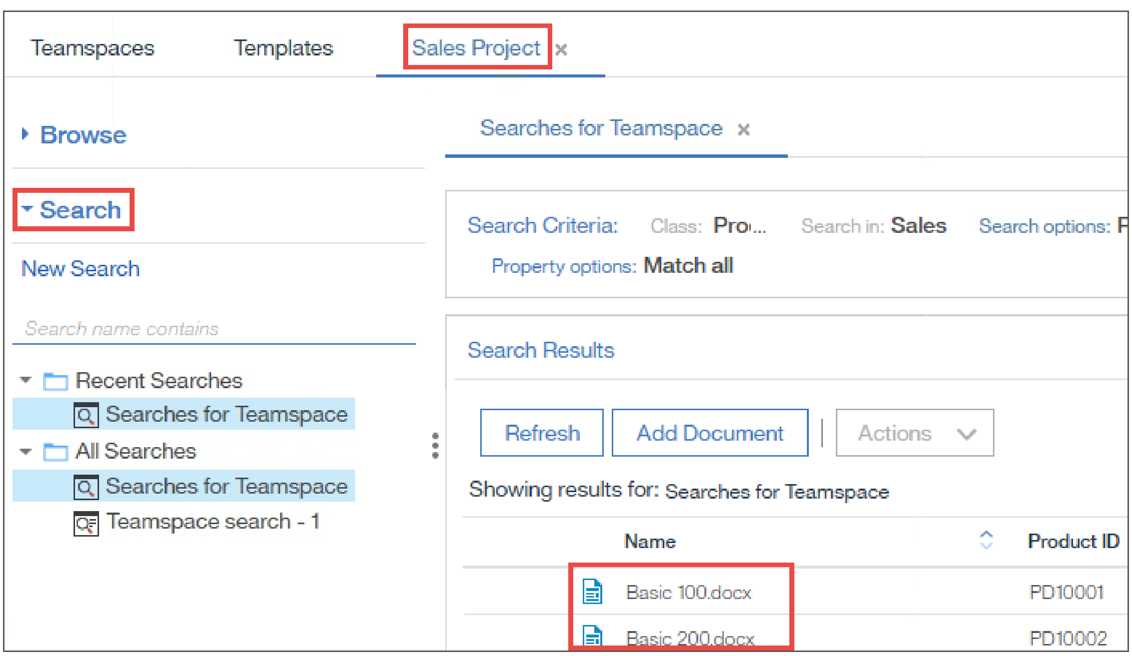
Hint

If you cannot see the complete graphical user interface (GUI), change the zoom settings for the browser.

On the Firefox browser toolbar, click **View** > **Zoom** > **Zoom Out**

__ b. From the **All Searches** folder, click a search to open.

__ c. On the right pane, click **Search** to run the search and verify that it returns a list of documents that matches the search criteria of the search.



__ 5. To check the team members, from the lower left of the navigation pane, expand the **Team** node.

The users who can access the teamspace are shown with their respective roles.

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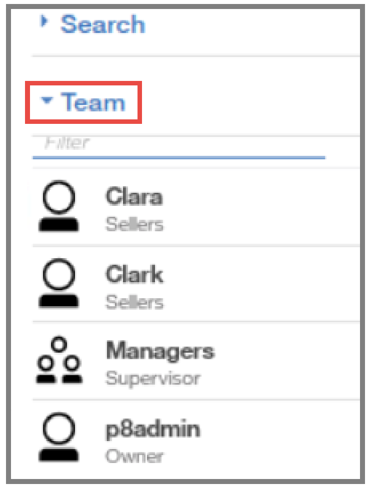


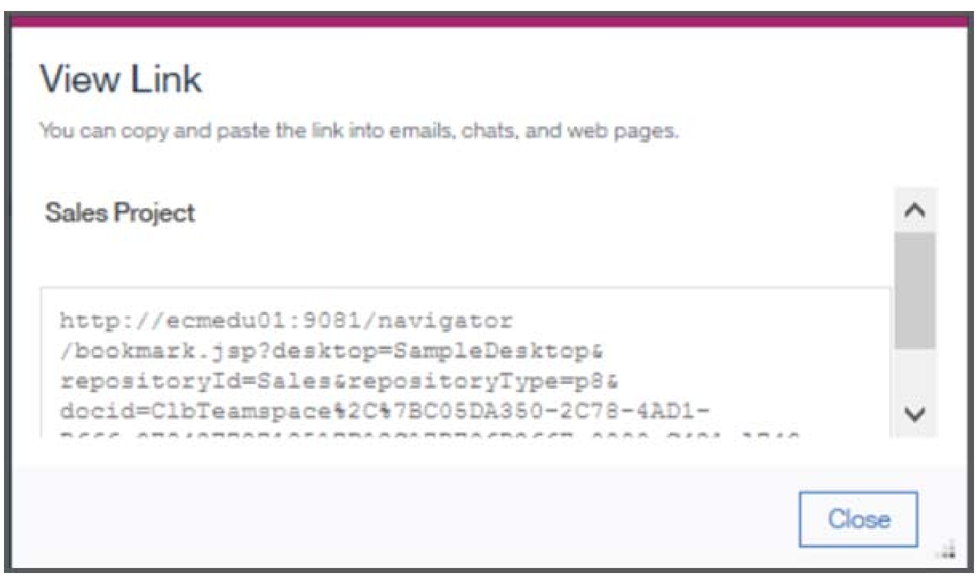
__ 6. Close the **Sales Project** tab.

7.3. View a link for an existing teamspace

You are on the **Teamspaces** tab.

__ 1. Right-click **Sales Project** and select **Link** > **View Link**.

The **View Link** dialog box shows a **URL** link.



__ 2. Copy the complete text for the link and paste it in a new Firefox tab.

__ a. If prompted to log on, log on as **p8admin** (password: **FileNet1**).

__ b. Verify that the IBM Content Navigator Desktop opens to **Teamspace** and its assets are shown.

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You can share the link for the teamspace with the users who are authorized to access the teamspace and associated repository assets.

__ c. Close the tab.

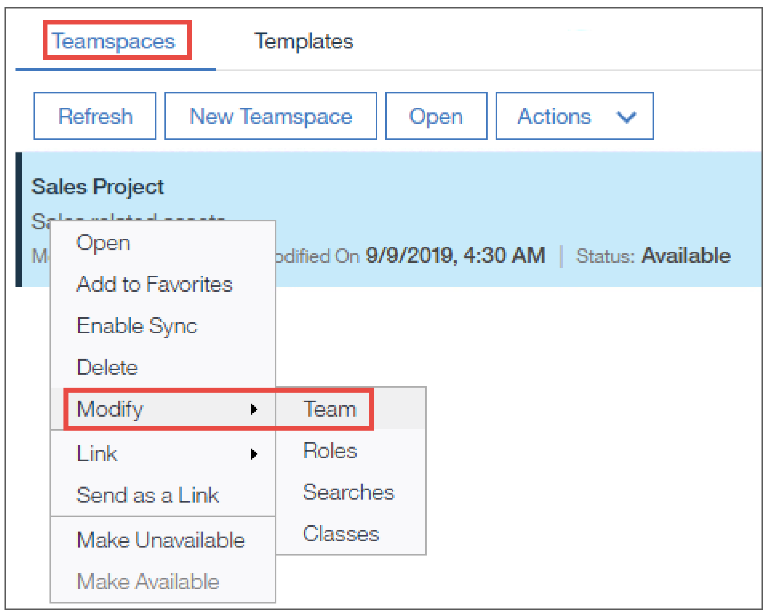
__ 3. Click **Close** on the **View Link** dialog box.

__ 4. Leave the **Teamspaces** tab open for the next section.

7.4. Modify an existing teamspace

After you create a teamspace, you can modify its team members, roles, searches, and classes.

__ 1. On the **Teamspaces** tab, right-click **Sales Project** and explore the other actions available for the teamspace.



__ 2. Select **Modify** > **Team**.

__ a. On the **Modify Teamspace** page > **Team** tab, notice that you can add more users and groups.

__ b. Add the group **p8users** with **Sellers** role.

__ c. Select the **Managers** group and from the **Available roles** pane, select **Owner**.

__ d. Notice that **Managers** now have the **Owner** and **Supervisor** roles.

__ 3. Select the **Roles** tab.

__ 4. Select a role, scroll to the right, and notice that you can modify the permissions for the selected role.

__ 5. Select the **Classes** tab and observe that you can add or remove document classes that are assigned to the teamspace.

__ 6. Select the **Searches** tab and notice that you can add or remove saved searches that are assigned to the teamspace. You can also create new searches.

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__ 7. Click **OK** to save the changes and close the page.

__ 8. Log out of IBM Content Navigator and close the browser.

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Section 8. Configure role-based desktop administration

In this section, you log in as the global administrator and create roles for desktop administration. You then log in as the user of a role that you configured and verify the access to the administration tasks.

8.1. Create a role

__ 1. Open the Firefox browser and log in to the IBM Content Navigator administration tool as a global administrator.

- **ICN Admin** shortcut or **URL**: `http://ecmedu01:9081/navigator/?desktop=admin`
- **User name**: `p8admin`
- **Password**: `FileNet1`

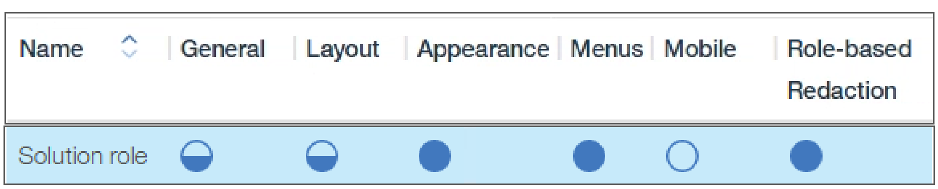
__ 2. Create a role.

__ a. From the left pane, click **Role-based Desktop Administration**, the last item in the list.

The **Role-based Desktop Administration** tab lists the existing desktop administrator roles.

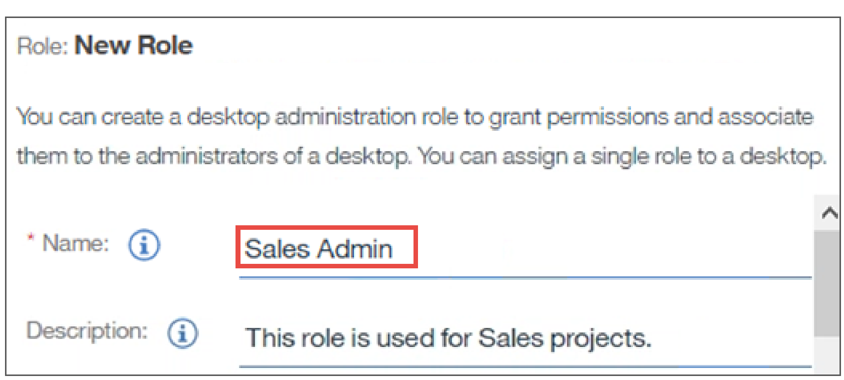
__ b. For the **Solution role**, notice that the access permissions are shown as circles:

- Some of them are filled completely, which indicates all privileges
- Some are half-filled, which indicates some privileges
- Some are empty, which indicates no privileges



__ c. Click **New Role**.

__ d. On the **New Role** tab, for **Name**, type `Sales Admin` and for **Description**, type `This role is used for Sales projects`.



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__ 3. Select the privileges.

Hint

If you cannot see the complete graphical user interface (GUI), change the zoom settings for the browser.

On the Firefox browser toolbar, click **View** > **Zoom** > **Zoom Out**

__ a. From the **General** category, select **Desktop Configuration**.

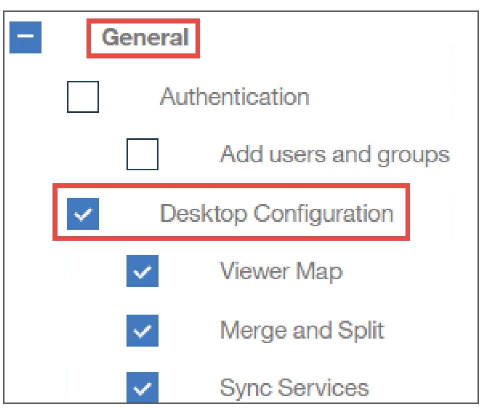
It selects all the items under that subcategory.

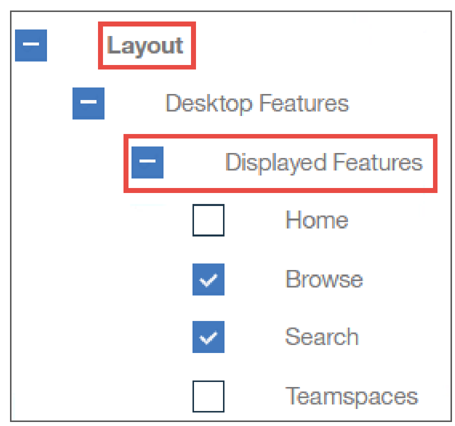
__ b. When you select all the items, notice that the check boxes for the subcategory have a tick mark symbol.

__ c. Scroll down to the **Layout** category, under the **Desktop Features** > **Displayed Features** subcategory, select the following privileges:

- **Browse**
- **Search**

__ d. When you select only some of the items, notice that the check boxes for the categories have a hyphen symbol.





__ e. Select all the items for the following categories:

- **Menus**
- **Role-based Redaction**

When you select a category or a subcategory, it selects all the items under that item.

__ f. Click **Save and Close**.

__ 4. Back on the **Role-based Desktop Administration** tab, verify that the new role is listed.

__ 5. Copy a role.

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You can create new roles by copying an existing role and edit the privileges.

__ a. On the **Role-based Desktop Administration** tab, select the **Sales Admin** row and then click **Copy**.

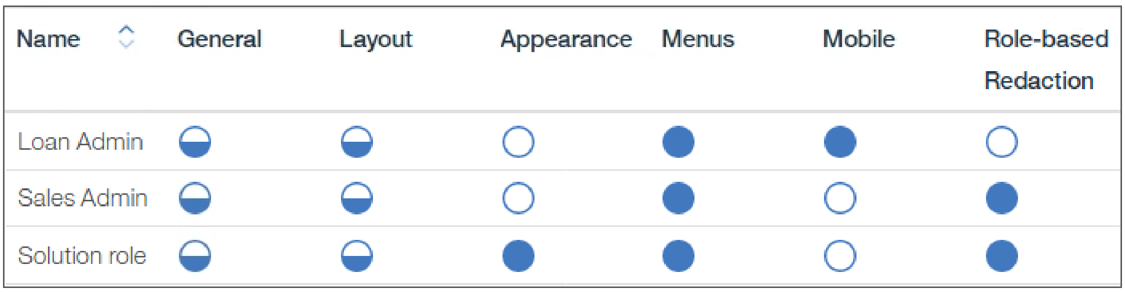
__ b. On the **New Role** tab, type `Loan Admin` for **Name** and type `this role is used for loan process` for **Description**.

__ c. Select all the items in the **Mobile** category.

__ d. Clear the **Role-based Redaction** selection.

__ e. Click **Save and Close**.

__ f. Back on the **Role-based Desktop Administration** tab, verify that the new role is listed.



Name	General	Layout	Appearance	Menus	Mobile	Role-based Redaction
Loan Admin	◒	◒	○	●	●	○
Sales Admin	◒	◒	○	●	○	●
Solution role	◒	◒	●	●	○	●

Information

You can also export and import the Desktop Administration roles.

8.2. Assign the role to a desktop

In this section, you enable role-based desktop administration and then assign the role to a desktop so that the users get access for the desktop administration.

__ 1. Select the **Solution role** row and check the desktops that are associated with this role at the bottom of the page.

- The **Membership** column shows the list of users that are given the administrator access.

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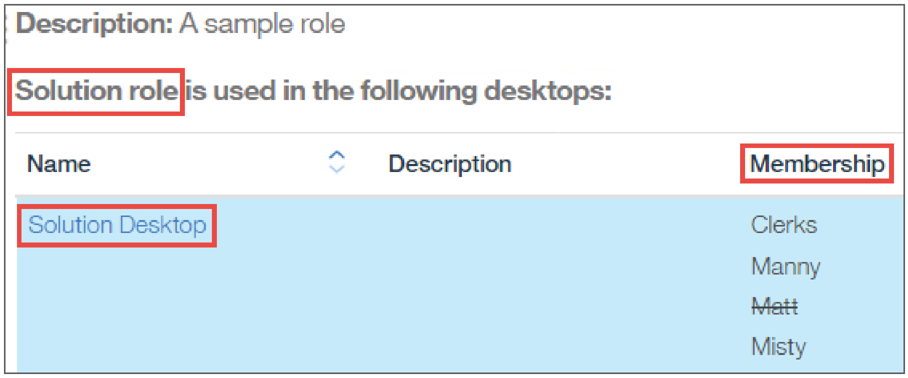
- The name **Matt** with a strike through shows that the access is explicitly denied for that user.



__ 2. Select the **Sales Admin** row and notice that no desktops are listed yet for this role at the end of the page.

__ 3. Enable Role-based Desktop Authentication for the desktop.

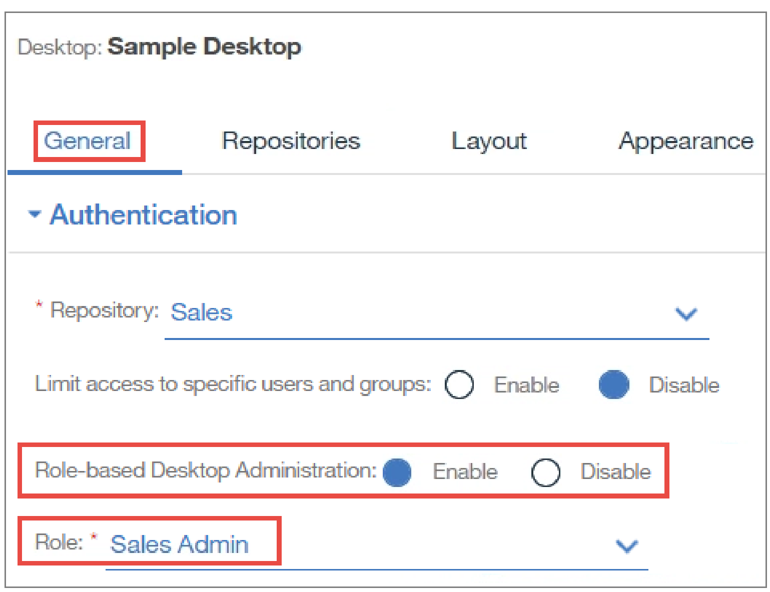
__ a. From the left pane, click **Desktops**.

__ b. On the **Desktops** tab, select **Sample Desktop** and click **Edit**.

The **Sample Desktop** > **General** subtab opens.

__ c. Scroll down to the **Authentication** section, select **Enable** for the **Role-based Desktop Authentication** field.

__ 4. For the **Role** field, select the **Sales Admin** role from the list.



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__ 5. Select the administrator users.

__ a. Click **Select Users** and when prompted, enter the following logon credentials in the **Log In** dialog box and click **Log In**.

- User name: `p8admin`
- Password: `FileNet1`

__ b. On the **Add Users and Groups** page, add the following users and groups:

- **Clara**
- **Clerk**
- **Olivia**
- **Managers**

__ c. Scroll down to the end of the page and select **Allow** from the list for the **Permissions** field.

__ d. Click **Add** to save and close the page.

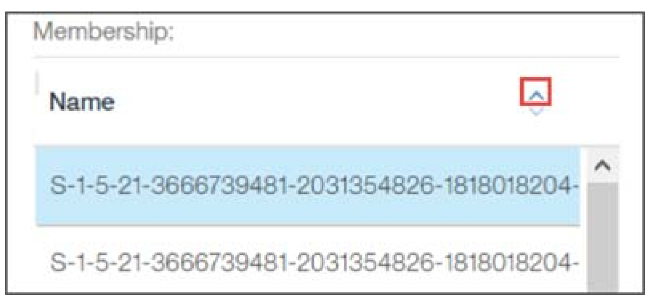
__ 6. Edit the administrator users list.

__ a. Back on the **Sample Desktop** tab, review the users that you added under the **Membership** section.

On this page, you can remove a user. You can also deny access to a user.

Hint

If the names are not shown (and only long string of numbers are shown), in the **Membership** section, click the upward arrow next to **Name** on the title bar.



__ b. Select **Olivia** and then for the **Access** field, select **Deny** from the list.

__ c. Verify that the user name has a strike through to denote this user is denied access.

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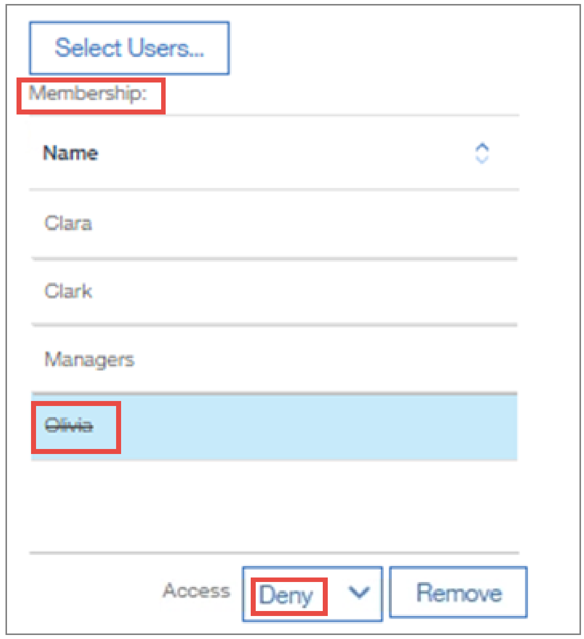


__ d. Click **Save and Close** to save the changes to the desktop.

__ 7. Click **Refresh** on the **Desktops** tab.

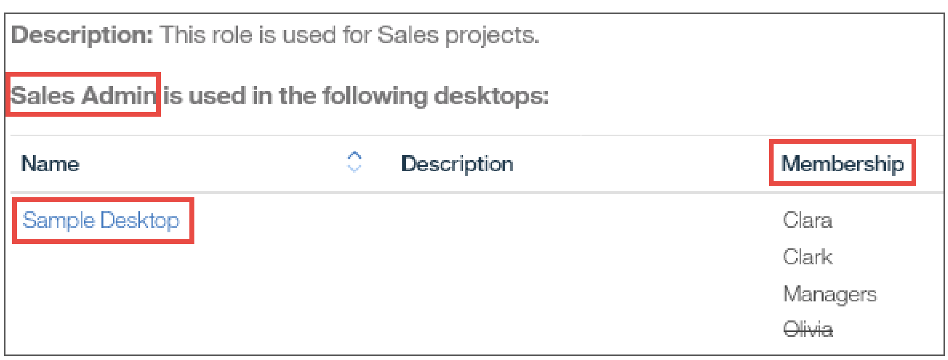
__ 8. Verify the role for its association with the desktop.

__ a. From the left pane, click **Role-based Desktop Administration**.

__ b. On the **Role-based Desktop Administration** tab, click **Refresh**.

__ c. Select **Sales admin.**

__ d. Verify that the desktops that are associated with the role are listed at the end of the page.



__ e. Logout of the IBM Content Navigator administration tool.

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Troubleshooting

If the associated desktop and membership details are not shown, close the **Role-based Desktop Administration** tab and reopen it to refresh the data.

If the changes are not reflected, log out and log back in and verify the changes.

8.3. Test the admin access to a desktop

In this section, you log in to a desktop as one of the administrators that you configured in the previous section and verify the access permissions.

__ 1. Open the Firefox browser and log in to the IBM Content Navigator Sample Desktop.

- **Sample Desktop** shortcut or URL: `http://ecmedu01:9081/navigator/?desktop=SampleDesktop`
- **User ID**: `Clara`
- **Password**: `FileNet1`

__ 2. Click the down arrow next to **Browse** on the upper left and select **Administration** (gear icon) to go to the administration page.

Clara now has access to Administration after Clara is added to the administration role.

__ 3. In the left navigation pane, notice that only a few items such as **Desktop** and **Role-based Redactions** are available as compared to the access for a global administrator **p8admin**.

__ 4. Click **Desktop** and check the access for the **General** subtab.

__ 5. On the **Sample Desktop** tab, notice that only the **General**, **Layout**, and **Menus** tabs for which you gave access are shown.

__ 6. On the **General** subtab, under the **Authentication** section, notice that the user cannot change values for the authenticating repository or **Role** fields.

__ 7. Scroll down and verify that Clara has access to modify the items under the **Desktop Configuration** section.

The sections that are not accessible to the user are hidden.

Hint

Optionally, in a different browser (**Chrome**), you can open the administration desktop as a global administrator **p8admin** and compare what features are available for the two different administrators.

__ 8. Check the access for the **Layout** subtab.

__ a. Click the **Layout** tab.

__ b. Verify that the user can edit the **Browse** and **Search** features but not to the other features.

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You granted access permission for the **Browse** and **Search** features to this user.

__ 9. Select the **Menus** subtab and verify that the user can make changes.

Note

You are going to learn more about menus in a following unit.

10. Logout of the IBM Content Navigator desktop.

8.4. Edit the role permissions

In this section, you edit the role that you created earlier and check the changes to the desktop administration access.

__ 1. In the Firefox browser, log in to the IBM Content Navigator administration tool as a global administrator.

- **ICN Admin** shortcut or URL: `http://ecmedu01:9081/navigator/?desktop=admin`
- **User name**: `p8admin`
- **Password**: `FileNet1`

__ 2. Open the role for editing.

__ a. From the left pane, click **Role-based Desktop Administration**.

__ b. On the **Role-based Desktop Administration** tab, select the **Sales Admin** role and click **Edit** from the toolbar.

__ 3. On the **Sales Admin** tab, modify the privileges.

__ a. For the **Layout** category, under the **Desktop Features** > **Displayed Features** subcategory, select **Home**.

__ b. Remove the privileges for the **Role-based Redaction** category.

__ 4. Click **Save and Close** and log out of the IBM Content Navigator administration tool.

8.5. Test the admin access to a desktop after editing the role

__ 1. In the Firefox browser, log in to the IBM Content Navigator Sample Desktop.

- **Sample Desktop** shortcut or URL: `http://ecmedu01:9081/navigator/?desktop=SampleDesktop`
- **User ID**: `Clara`
- **Password**: `FileNet1`

__ 2. Switch from the **Browse** view to the **Administration** view.

__ 3. On the left navigation pane, observe that the **Role-based Redaction** option is not available.

__ 4. Select the **Layout** subtab and verify that the user can now modify the **Home** feature.

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__ 5. Log out of the IBM Content Navigator desktop.

End of exercise

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Exercise review and wrap-up

This exercise showed how to configure various components for an IBM Content Navigator desktop.

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Exercise 3. Customizing an IBM Content Navigator Desktop

Estimated time

02:30

Overview

In this exercise, you learn how to customize various components for an IBM Content Navigator desktop.

Objectives

After completing this exercise, you should be able to:

- Customize a desktop banner, login page, and theme
- Modify menus, icons, and labels
- Create a viewer map
- Register a plug-in

Introduction

In this exercise, you customize the IBM Content Navigator desktop appearance for banner, login page, and over all theme without writing any code. You also learn about how to create custom menus, and modify the icons and labels.

You learn about how to associate different viewers with different file types. For example, you replace the default viewers for PDF files with Adobe Reader for viewing the documents from the FileNet Content Manager repository. You also register and configure a custom plug-in to extend some features for your IBM Content Navigator web client.

This exercise includes the following sections:

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Requirements

The activities in this unit assume that you have access to the student system that is configured for these activities and all components are running when you begin an exercise.

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Section 1. Customize a desktop banner and login page

In this section, you copy an existing desktop, save it as another desktop, and use the new desktop for this exercise. You then customize the banner and login page for the new desktop.

1.1. Copy a desktop

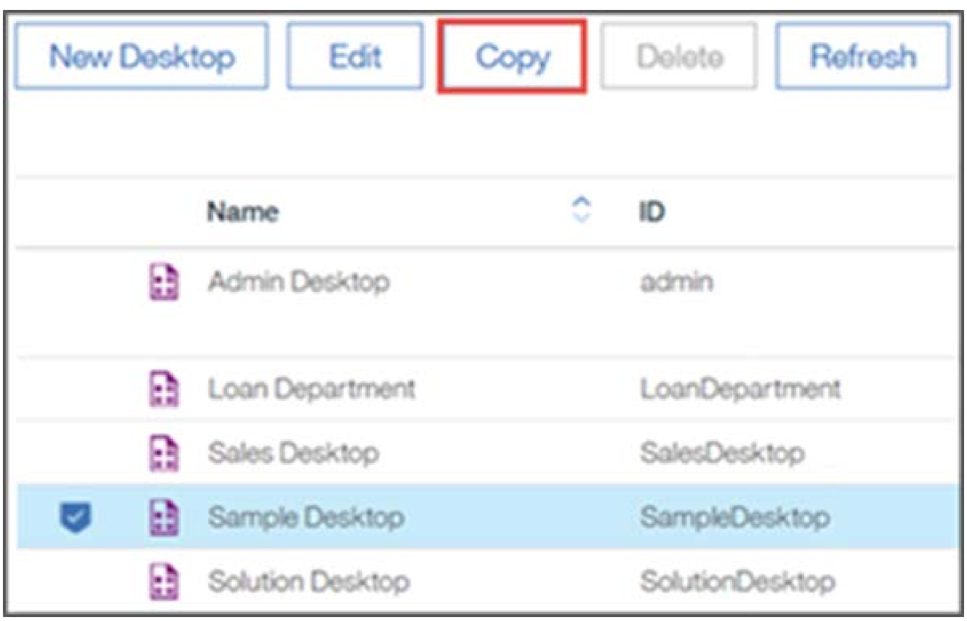
Important

Before you begin the exercise, ensure that the components are running. If you did not start the components already, refer to Section 1, "Prepare your system: Start the components," on page 1-3 to start them.

__ 1. In the **Firefox** browser, log in to the IBM Content Navigator administration tool.

- The **ICN Admin** shortcut or **URL**: `http://ecmedu01:9081/navigator/?desktop=admin`
- **User name**: `p8admin`
- **Password**: `FileNet1`

__ 2. On the **Desktops** tab, select **Sample Desktop** and click **Copy**.



The **New Desktop** tab opens.

__ 3. On the **General** subtab, for **Name**, enter `Custom Desktop.`

The ID field is automatically populated.

__ 4. Click the **Appearance** subtab and edit the **Application name** to `Custom Desktop`.

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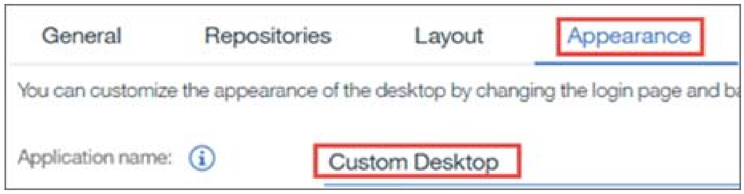


__ 5. Click **Save and Close** and then verify that the new desktop is listed in the **Desktops** tab.

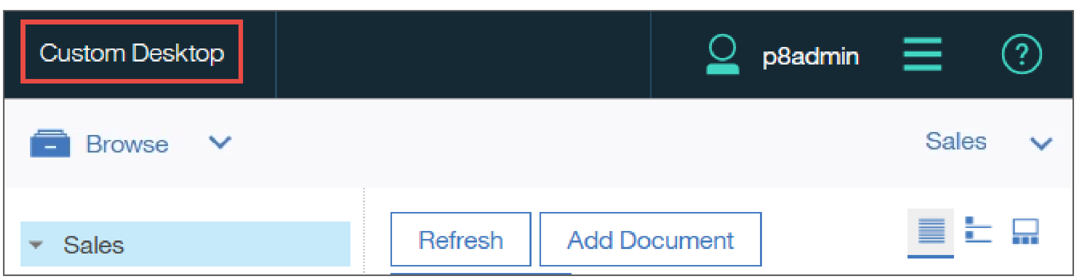
__ 6. In the **Firefox** browser, log in to **Custom Desktop**.

- **URL**: `http://ecmedu01:9081/navigator/?desktop=CustomDesktop`
- **User name**: `p8admin`
- **Password**: `FileNet1`

Hint

Create a browser shortcut for **Custom Desktop** to use it throughout this exercise.

__ 7. Verify that the banner shows **Custom Desktop** for the new desktop.



__ 8. Leave **Custom Desktop** open for the next section.

1.2. Apply a new theme to your desktop

In this section, you apply a different theme that is available with the IBM Content Navigator installation.

__ 1. Open the Desktop for editing.

__ a. On **Custom Desktop**, switch from the **Browse** view to the **Administration** view.

__ b. On the **Desktops** tab, select **Custom Desktop** and click **Edit**.

__ 2. On the **Custom Desktop** tab, select the **Appearance** tab.

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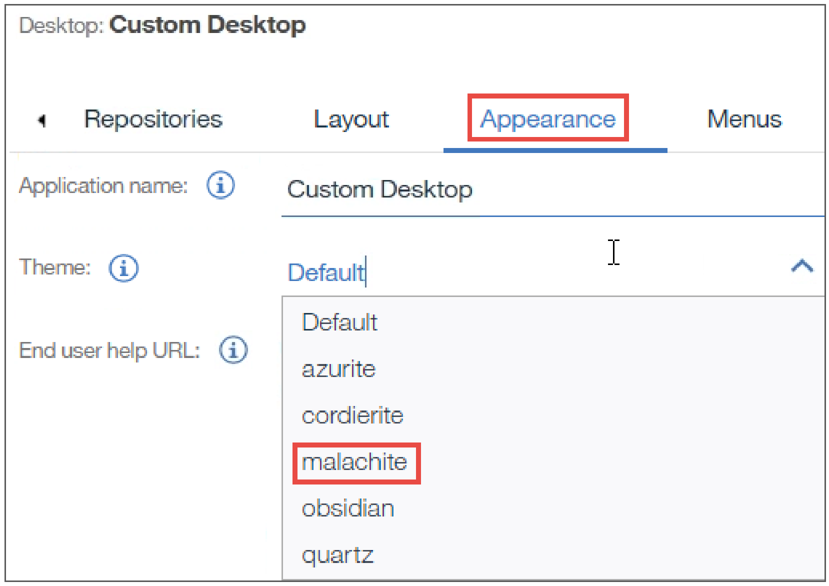
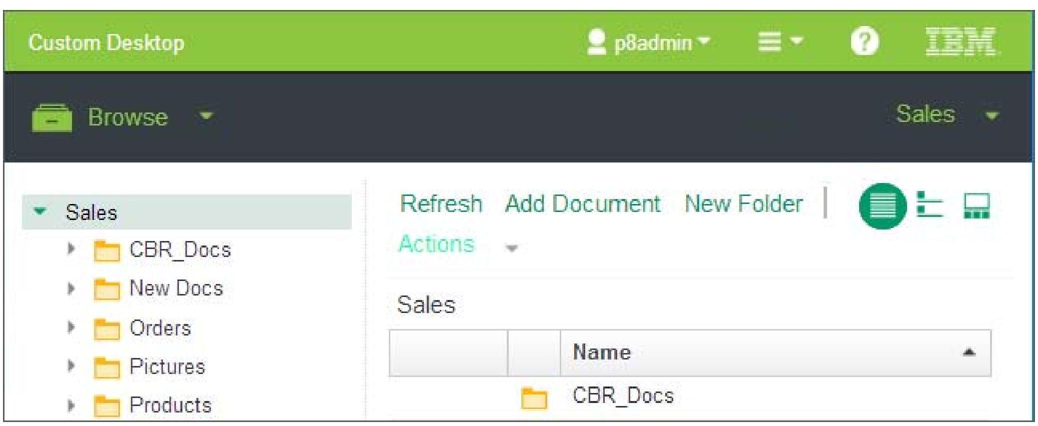
__ 3. On the **Appearance** tab, for the **Theme** field, select **malachite** from the list.



__ 4. Click **Save and Close**.

__ 5. On the **Information** dialog box, when you are prompted to refresh, click **Close**.

__ 6. Refresh the browser and verify that the desktop now has a new theme.



1.3. Verify the files

The files that are required for the following sections are already copied to the WebSphere Application Server directory on your student system.

__ 1. In Windows Explorer, go to the folder:

```
C:\Program Files\IBM\WebSphere\AppServer\profiles\AppSrv01\installedApps\
EDUCell01\navigator.ear\navigator.war\
```

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__ 2. Verify the following items exist and review their contents:

- An image file for the banner logo and the login page logo in the **EDUImages** folder:
  `IBM_Logo.jpg`
  `IBM_Nav_Logo.png`
- An HTML file for login page information in the **EDUFiles** folder:

  `EDULoginNotes.html`
  Optionally, open the HTML file and check the content.

1.4. Create a custom theme

In this section, you create a custom theme to add a custom banner and change the Login page.

__ 1. Open the **Firefox** browser and log in to the IBM Content Navigator administration tool.

- The **ICN Admin** shortcut or **URL**: `http://ecmedu01:9081/navigator/?desktop=admin`
- **User name**: `p8admin`
- **Password**: `FileNet1`

__ 2. Create a theme.

__ a. On the left navigation pane, click **Themes**.

__ b. On the **Themes** tab, notice that a list of themes is available.

The same list was available for the desktop when you selected a theme in the previous section.

Hint

You can copy any of the themes and customize them or you can create a new one.

__ c. Click **New Theme**.

The **New Theme** tab opens.

__ d. For **Name**, enter: `EDU Theme`

The ID field is automatically populated.

__ 3. Add colors to the **Color Palette**.

__ a. Scroll down to the **Color Palette** section and verify that **Color 1** is listed.

__ b. Click **Add Color** and enter the hexadecimal (HEX) value for the color from the following table.

You can also click the color circle to use the color picker and select the colors that you want. You can add as many colors as you want.

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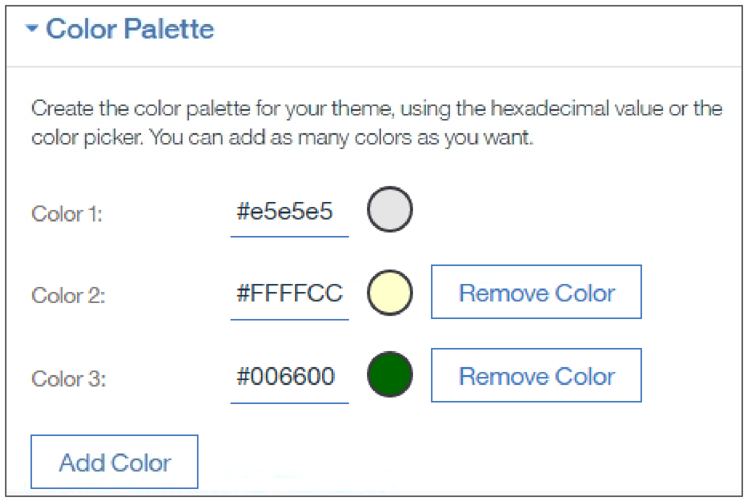
Field Name	Value
Color 2	#FFFFCC
Color 3	#006600



__ c. Click **Save**.

__ 4. Customize the Login Page Elements.

__ a. Scroll down to the **Login Page Elements** section and expand it.

__ b. Use the data in the following table and set the field values.

Field Name	Value
Login page background color	#e5e5e5 (Color 1)
Login pane background color	#FFFFCC (Color 2)
Text color	#006600 (Color 3)
Login page logo	URL
Login page logo > URL	`http://ecmedu01:9081/navigator/EDUImages/IBM_Nav_logo.png`

__ c. Click **Save**.

Important

The URL value is case-sensitive. Ensure that the URL value is entered correctly.

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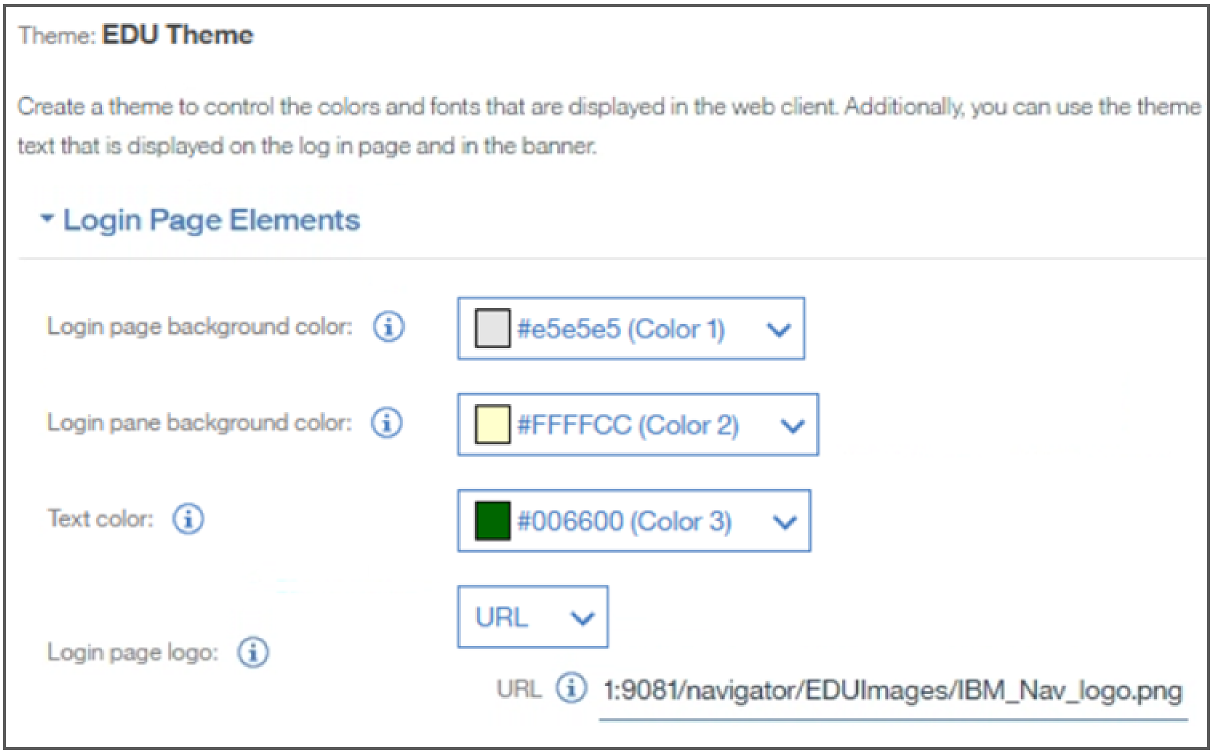

__ 5. Add a custom banner.

__ a. Collapse the **Login Page Elements** section.

__ b. Scroll down to the **Banner Elements** section and expand it.

__ c. Use the data in the following table and set the field values.

The URL value is case-sensitive.

Leave the default values for other fields.

Field Name	**Value**
Background color	#FFFFCC (Color 2)
Text and icon color	#006600 (Color 3)
Banner logo	Custom Logo URL
Banner logo > URL	EDUImages/IBM_Logo.jpg

Note

You can also enter the relative path for the files (example: `EDUImages/IBM_Logo.jpg`)because these files are copied to the Content Navigator web application directory. If you are using a file from a different web application, then you must enter a fully qualified URL address.

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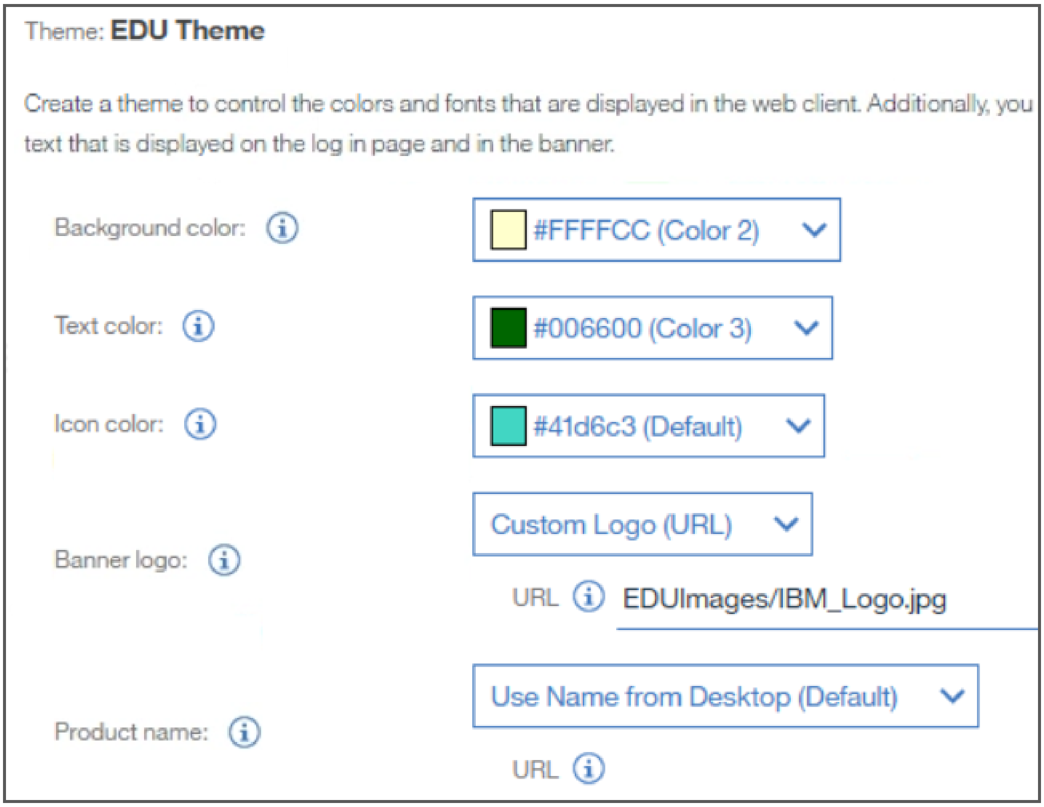


__ 6. Click **Save and Close** and then close the **Themes** tab.

__ 7. Leave the IBM Content Navigator Administration view open for the next section.

1.5. Edit the new desktop to use the custom theme

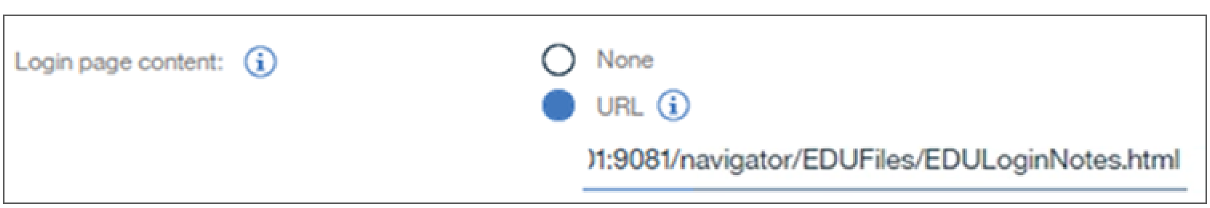
__ 1. On the **Desktops** tab, right-click **Custom Desktop** and click **Edit**.

__ 2. Click the **Appearance** subtab.

__ 3. For the **Theme** field, select **EDU Theme** from the list.

__ 4. Scroll down to the **Login page content** field, select the **URL** option, and type the **URL**: `http://ecmedu01:9081/navigator/EDUFiles/EDULoginNotes.html`

The **URL** is case-sensitive.



__ 5. Click **Save and Close** and log out of IBM Content Navigator.

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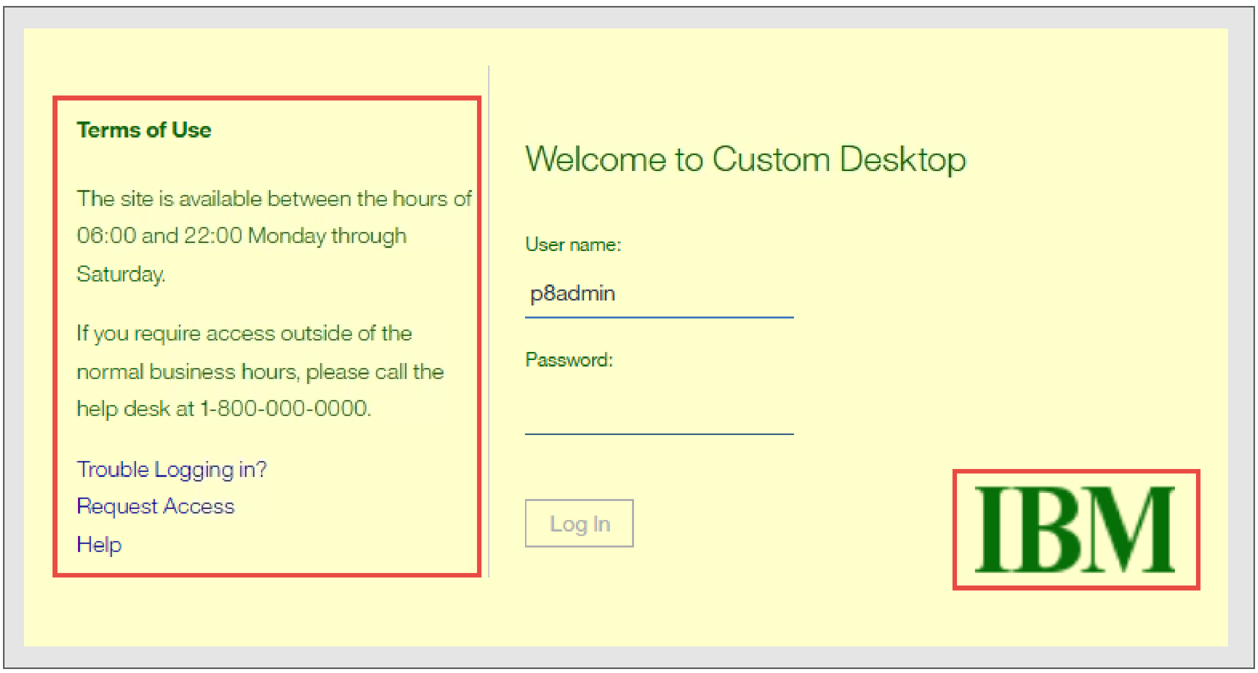
1.6. Verify custom UI changes for the desktop

__ 1. Open the **Custom Desktop** login page.

- **URL**: `http://ecmedu01:9081/navigator/?desktop=CustomDesktop`

__ 2. Verify the following changes to the login page of **Custom Desktop**.

- A new section on the left pane that shows help text and other details as configured in the html file
- A new logo on the lower right corner
- Yellow color for the background



__ 3. Log in to **Custom Desktop**:

- **User name**: `p8admin`
- **Password**: `FileNet1`

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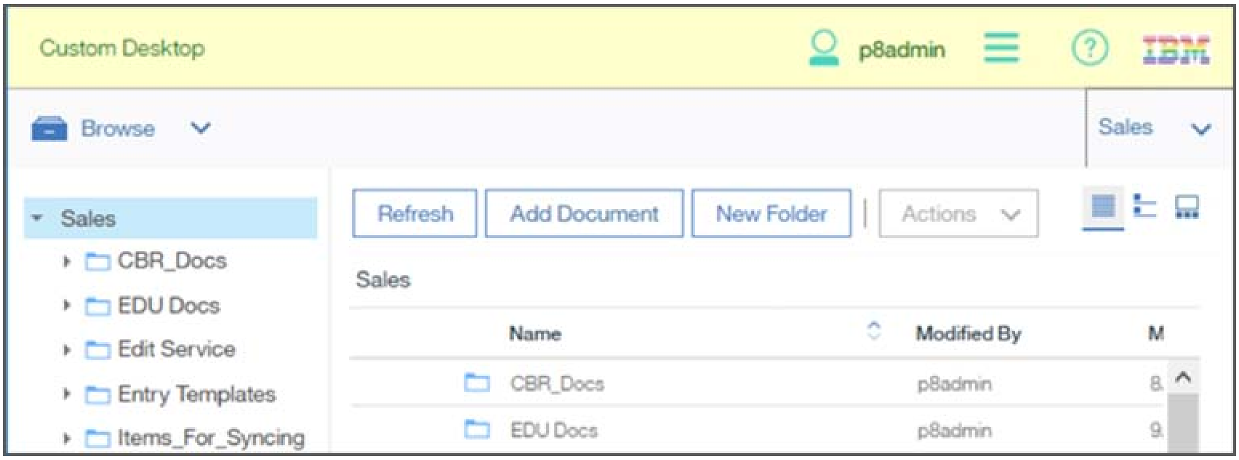
__ 4. Verify the following changes that you configured on the banner for **Custom Desktop**.

- Yellow background color for the banner
- A new **IBM** logo on the banner
- Green text color for Application name: **Custom Desktop** and user name on the banner: **p8admin**



__ 5. Log out of IBM Content Navigator and close the Browser.

Troubleshooting

If the custom changes are not applied, verify the EDU Theme entries since the URLs are case-sensitive.

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Section 2. Challenge: Customize the login page

Optional

Complete the following scenario to practice the tasks that you learned in this lesson.

Scenario: Announce the system unavailability to users in the login page

Your database administrator is scheduling a shutdown for system maintenance. During this time, some of the repositories that are configured in IBM Content Navigator are not available. You must customize the login page to announce the system unavailability to the users.

You must create an HTML file with the information that you want to show to users and copy it to the application server directory. Edit the desktop to include the URL for the login information.

Data

Use the data that is provided in the table and Customize the login page.

Item	Value
IBM Content Navigator Administrator account login - password	`p8admin - FileNet1`
Name of the HTML file to create	`SysUnavail.html`
Location of a sample login content file for your reference	`C:\Program Files\IBM\WebSphere\AppServer\profiles\AppSrv01\installedApps\EDUCell01\navigator.ear\navigator.war\EDUFiles\EDULoginNotes.html`
Folder location to copy the HTML file **Note:** You must create the UrgentInfo folder	`C:\Program Files\IBM\WebSphere\AppServer\profiles\AppSrv01\installedApps\EDUCell01\navigator.ear\navigator.war\UrgentInfo`
Name of the desktop to edit	`Custom Desktop`
Login page content URL	`http://ecmedu01:9081/navigator/UrgentInfo/SysUnavail.html`

Hint

Make a copy of the **EDULoginNotes.html** file, rename the copy, and edit the content to add the information that you want to show.

Verification

- Access the desktop that you edited to view the login page content.
- Verify that the login page shows the information that you added to your HTML page.

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Section 3. Create a custom menu

In this section, you copy a default menu and modify it to remove an action from the menu. You replace the existing default document context menu for a desktop with the new menu.

Example scenario: Disable the Download As PDF option

Your company deploys IBM Content Navigator and IBM FileNet Content Manager. The data suggests that an excessive download of documents as PDF is causing suboptimal performance. You, as their Solution Developer, must disable the option to monitor the performance.

3.1. Check the default menu

__ 1. In the **Firefox** browser, log in to **Custom Desktop**.

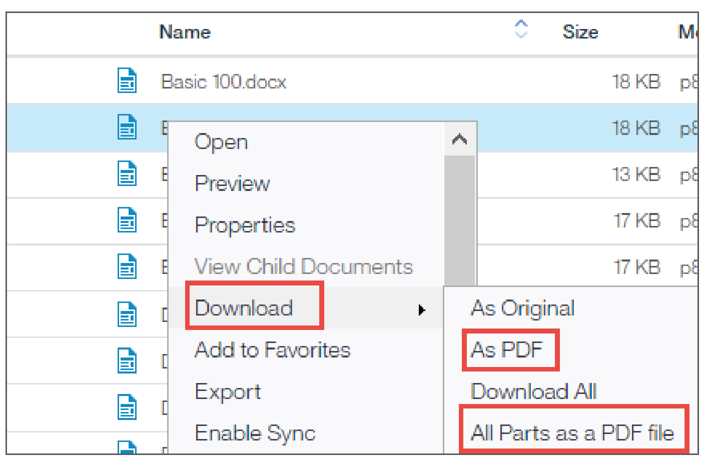
- **URL**: `http://ecmedu01:9081/navigator/?desktop=CustomDesktop`
- **User name**: `p8admin`
- **Password**: `FileNet1`

__ 2. Check the options available in the Default document context menu.

__ a. On the left pane, select the **Sales** > **Products** folder.

__ b. Right-click a document to see the list of actions available.

You are going to remove **Download** > **As PDF** and **Download** > **All Parts as a PDF file** from the list.



3.2. Customize a menu

__ 1. Switch from the **Browse** view to the **Administration** view.

__ 2. On the left pane, select **Menus**.

__ 3. Copy an existing menu.

__ a. On the **Menus** tab, type `Default docu` in the **Name contains** search field to filter the list.

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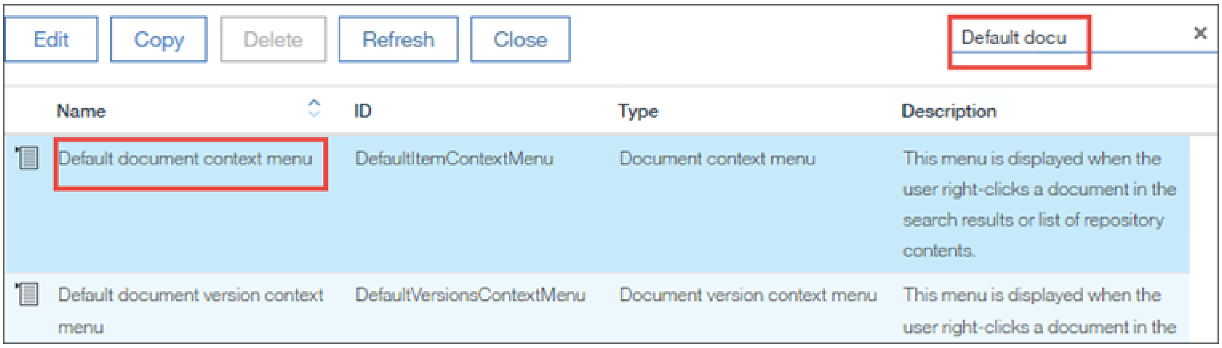
__ b. Select **Default document context menu**.



__ c. On the toolbar, click **Copy**.

The **New Menu** tab opens.

__ 4. Create a custom menu.

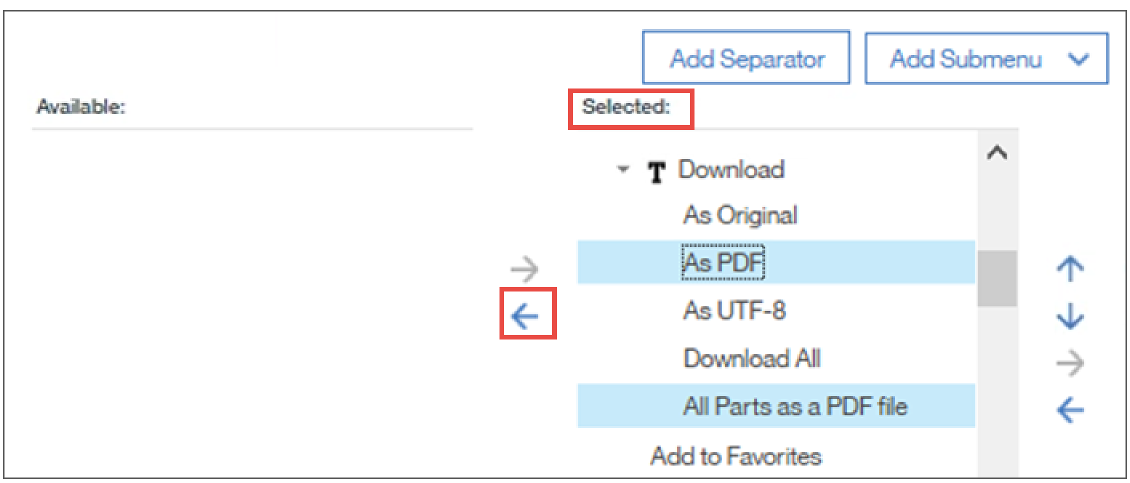
__ a. In the **Name** field, enter `EDUMenu`.

__ b. Scroll down to the **Selected** pane.

Use the browser Zoom Out feature to see the complete graphic user interface (GUI). From the browser toolbar, click **View** > **Zoom** > **Zoom Out**.

__ c. On the **Selected** pane, scroll down to **Download** and expand it.

__ d. Select **As PDF** and **All Parts as a PDF file** and click the left arrow to move the item to the **Available** pane.



__ e. Verify that the two menu items are moved to the **Available** pane.

This action removes the two menu items from the menu definition.

__ f. Click **Save and Close**.

__ g. Click **Close** on the **Menus** tab.

__ h. Leave IBM Content Navigator open for the next section.

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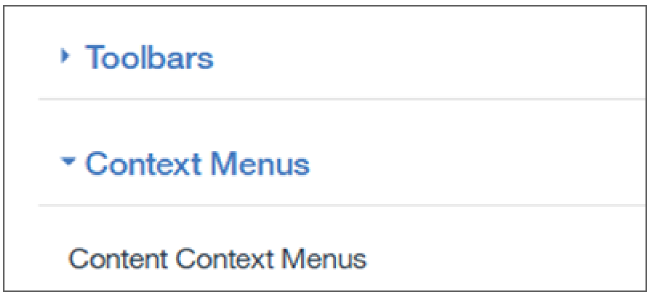
3.3. Assign the new menu to your desktop

You replace the existing default document context menu for this desktop with the new one.

__ 1. On the **Desktops** tab, select **Custom Desktop** and click **Edit**.

__ 2. Select the **Menus** tab and collapse the **Toolbars** section.

__ 3. In the **Context Menus** > **Content Context Menus** section, scroll down to the **Document context menu** list, select **EDUMenu**.



__ 4. Click **Save and Close**.

__ 5. On the **Information** dialog box, when you are prompted to refresh, click **Close**.

__ 6. Refresh the browser.

__ 7. Leave IBM Content Navigator open in **Browse** view for the next section.

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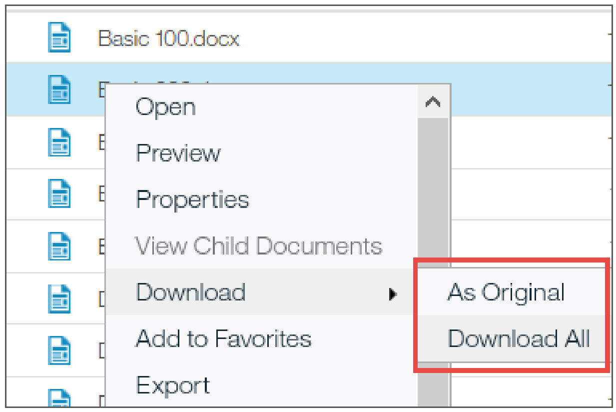
3.4. Test the new menu

__ 1. Select the **Sales** > **Products** folder.

__ 2. Right-click a document to see the list of actions available.

__ 3. Verify that **Download** > **As PDF** and **Download** > **All Parts as a PDF file** are no longer available on the list.



__ 4. Log out of IBM Content Navigator.

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Section 4. Customize an icon

In this section, you associate a custom icon for the text/plain and application/rtf document MIME types that are stored in the repository.

4.1. Check the default icon

__ 1. Open the Firefox browser and log in to **Custom Desktop**.

- **URL**: `http://ecmedu01:9081/navigator/?desktop=CustomDesktop`
- **User ID**: `p8admin`
- **Password**: `FileNet1`

__ 2. Check the default icon that is associated with the text document MIME type in the Repository.

__ a. Click the **Sales** > **Sample Docs** folder.

__ b. Check the icon for the text documents in this folder.

__ 3. Leave the IBM Content Navigator desktop open for the next section.

4.2. Customize the icon for text MIME type

__ 1. Switch from the **Browse** view to the **Administration** view.

__ 2. On the left pane, click **Icon Mapping**.

__ 3. For the **MIME Type Icons** section, in the **MIME type contains** search field, type `text`.

__ 4. Select **text/plain, application/rtf** MIME type.

Observe that the list has a similar item with the MIME type text/html and text/xml. For this section, select the **Plain Text File Icon** item with the MIME type **text/plain**.

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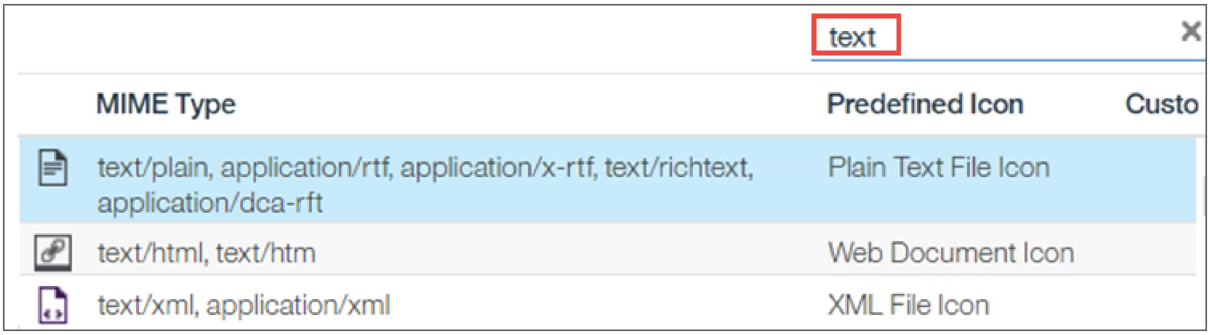
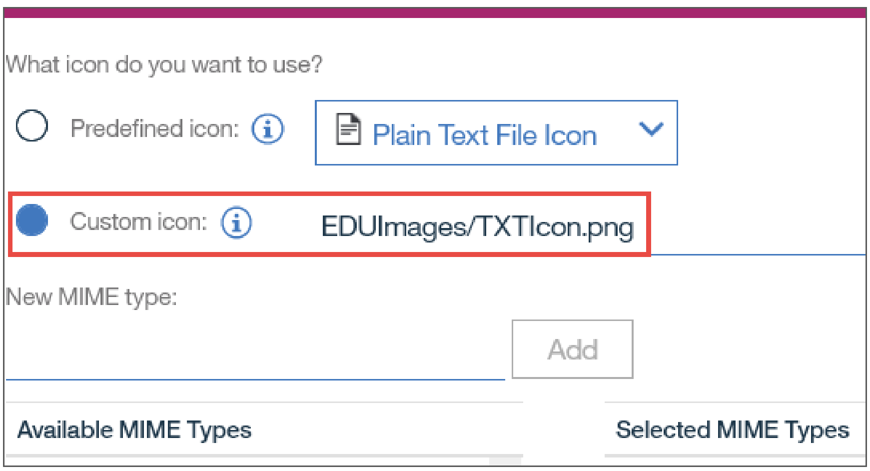


__ 5. Click **Edit**.

__ 6. On the **Icon Mapping** page, select the **Custom icon** option and enter: `EDUImages/TXTIcon.png`



__ 7. Click **OK** at end of the page.

Note

You can include more MIME types to associate with this icon by moving items from the **Available MIME Types** list to the **Selected MIME Types** list. To add an item that is not in the Available list, you can enter the name in the **New MIME type** field and click **Add.**

The **TXTIcon.png** file that is used for the custom icon is already copied to the following WebSphere Application Server directory:

`C:\Program Files\IBM\WebSphere\AppServer\profiles\AppSrv01\installedApps\EDUCell01\navigator.ear\navigator.war\EDUImages`

__ 8. On the **Icon Mapping** tab, verify the following items:

- The text/plain MIME type shows a new icon in green color
- The **Custom Icon** column shows the relative URL path for the image

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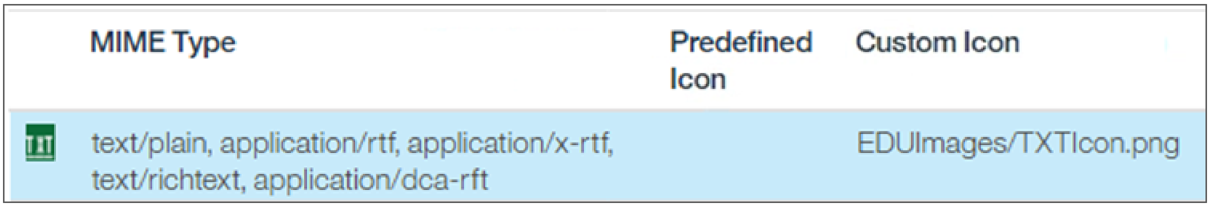


	MIME Type	Predefined Icon	Custom Icon
	text/plain, application/rtf, application/x-rtf, text/richtext, application/dca-rft		EDUImages/TXTIcon.png

__ 9. Click **Save and Close.**

__ 10. On the **Information** dialog box, when you are prompted to refresh, click **Close**.

__ 11. Refresh the desktop by refreshing the browser.

__ 12. Leave IBM Content Navigator open for the next section.

4.3. Test the new custom icon

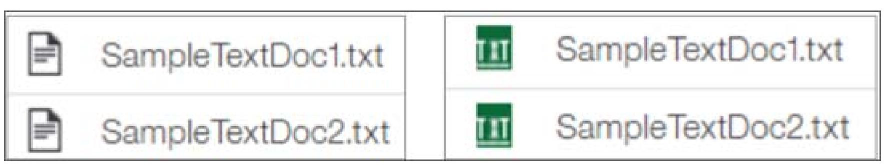
In this section, you test the new custom icon that is associated with the text document MIME type.

The **Custom Desktop** is open to the **Browse** view.

__ 1. On the left pane, click the **Sales** > **Sample Docs** folder.

__ 2. Verify that the text documents show the new icon in green color that you configured.

For comparison, the default icon before the customization is shown on the left in the following screen capture.



__ 3. Log out of IBM Content Navigator and close the browser.

Troubleshooting

If the custom icon is not shown, log out of IBM Content Navigator, close all the browser tabs, and then log back in to see the updated icon.

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Section 5. Modify labels

In this section, you edit an application label name and customize it.

Example scenario: Customize an application label with a familiar term

The business users in your company are familiar with the term Object Store. They use the term Repository to refer to a different system. You, as the Solution Developer, must customize the label. You change the application label name Repository to Object Store.

5.1. Check the default application label

__ 1. In the **Firefox** browser, log in to **Custom Desktop**.

- **URL**: `http://ecmedu01:9081/navigator/?desktop=CustomDesktop`
- **User ID**: `p8admin`
- **Password**: `FileNet1`

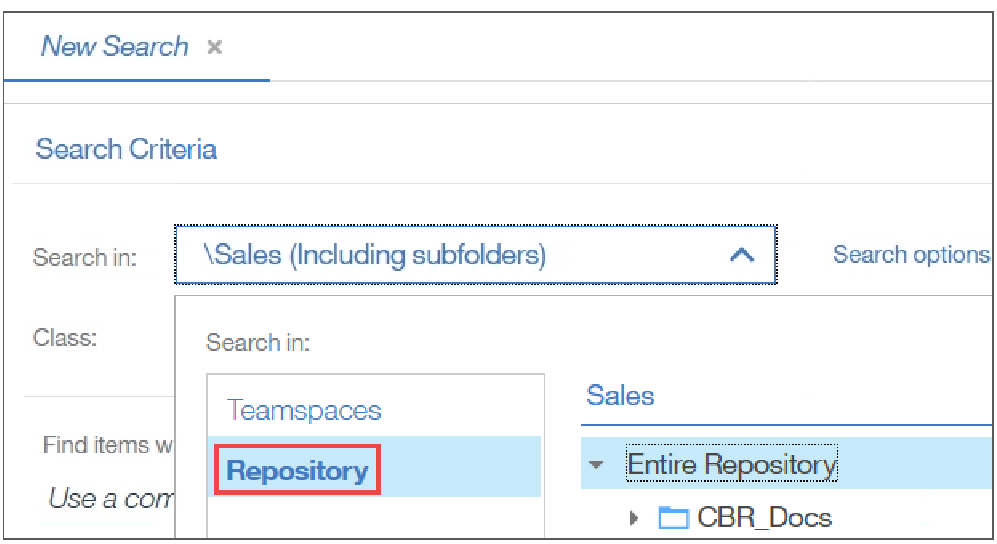
__ 2. Check the label for the Repository.

__ a. Click the down arrow next to **Browse** and select **Search**.

__ b. On the **Search** view, click **New Search**.

__ c. In the **Search Criteria** section, click the down arrow for the **Search in** field.

__ d. Check that the left pane has a label that is called **Repository**.



You modify the default label in the following section.

__ e. Click **Cancel** to close the search dialog box.

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5.2. Customize application labels

__ 1. Click the arrow next to **Search** and select **Administration** to open the administration view.

__ 2. Click **Labels** on the left pane.

On the **Labels** tab in the upper right of the page, notice that you can choose a different **Locale** to change the language.

The **Application Labels** subtab opens by default.

__ 3. On the **Repository** row, click the field in the **Current Label** column.

__ a. Type `Object Store` as the new label.

__ b. Click **Save and Close**.

__ 4. Refresh the desktop by refreshing the browser.

5.3. Test the new label

__ 1. Click the down arrow next to **Browse** and select **Search**.

__ 2. On the **Search** view, click **New Search**.

__ 3. In the **Search Criteria** section, click the down arrow for the **Search in** field.

__ 4. Verify that the left pane has the label name that you entered: **Object Store**

The default label before the edit was: **Repository**

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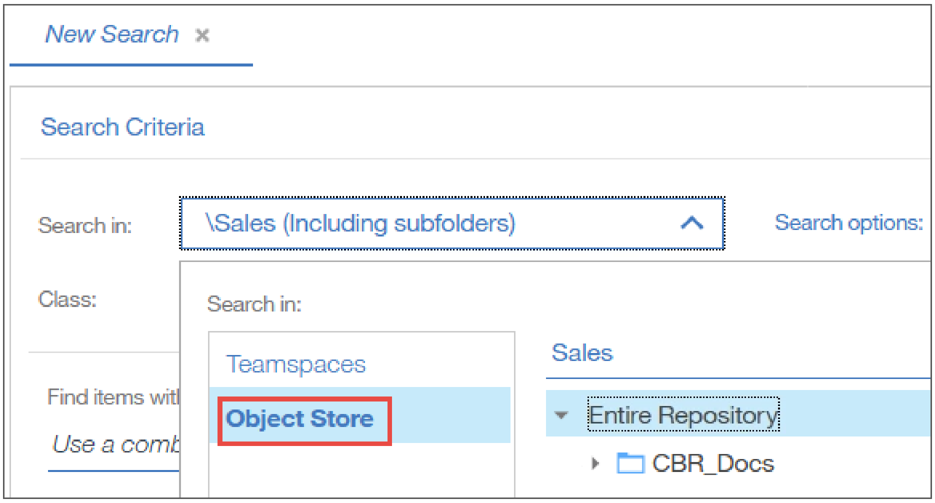

__ 5. Click **Cancel**, log out of IBM Content Navigator, and close the browser.

Troubleshooting

If the change is not reflected in the user interface (UI), clear the browser cache, log out, close the browser and log back in.

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Section 6. Create a viewer map for PDF files

In this section, you create a custom viewer map and associate it with a desktop. You replace the default viewers for the PDF files with Adobe Reader for the FileNet Content Manager repository.

6.1. Check the existing viewer map

__ 1. Open the **Firefox** browser and log in to **Custom Desktop**.

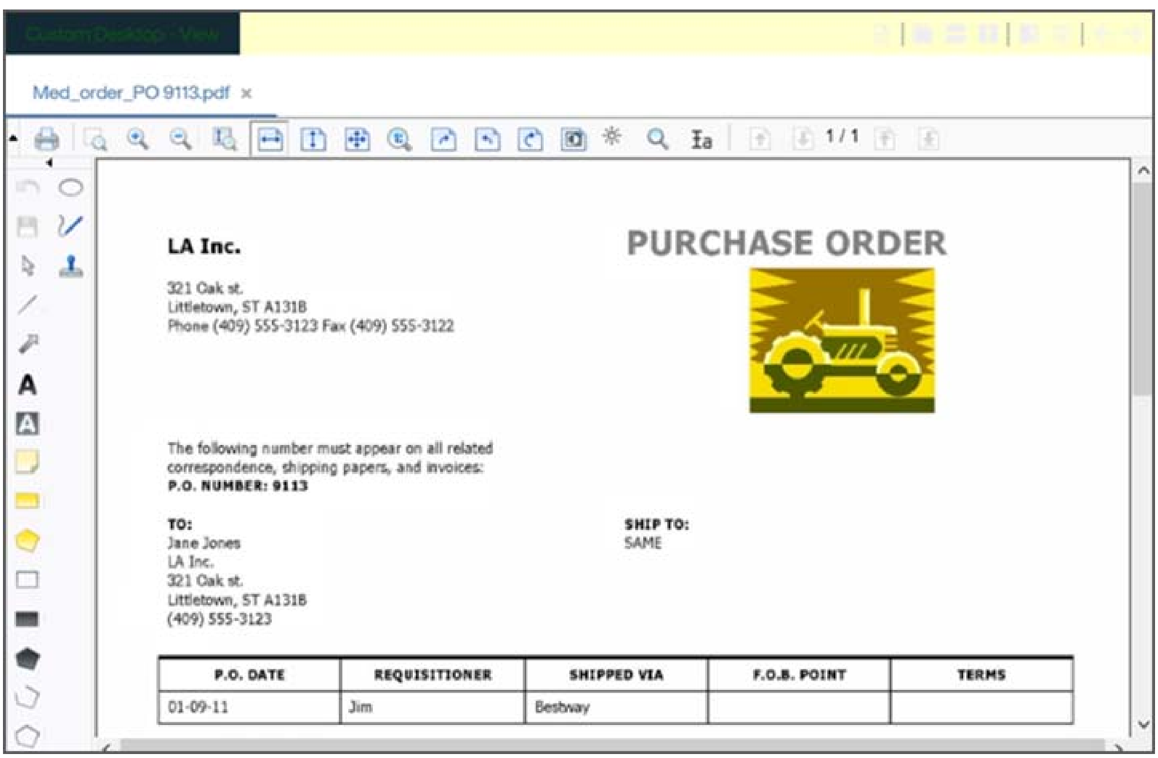
- **URL**: `http://ecmedu01:9081/navigator/?desktop=CustomDesktop`
- **User name**: `p8admin`
- **Password**: `FileNet1`

__ 2. Check the default viewer that is available to open a PDF document.

__ a. On the left pane, click the **Sales** > **Orders** folder.

__ b. Double-click **Med_order_PO 9113.pdf**.

The document opens in Daeja ViewONE Virtual Viewer which is the default viewer. The annotation controls are available on the side toolbar.



__ 3. Close the Viewer.

In the next section, you are going to change the default viewer that is assigned to PDF documents.

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6.2. Create a viewer map

__ 1. Switch from the **Browse** view to the **Administration** view.

__ 2. On the left pane, click **Viewer Maps**.

__ 3. Create a viewer map.

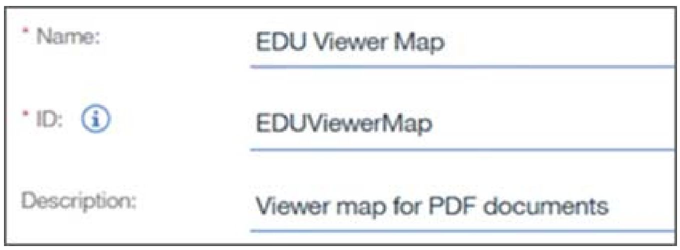
__ a. On the **Viewer Maps** tab, click **New Viewer Map**.

The **New Viewer Map** tab opens. The new viewer map contains a copy of all the mappings from the default viewer map.

__ b. In the **Name** field, enter: `EDU Viewer Map`

The ID value is populated automatically.

__ c. Edit the description to: `Viewer map for PDF documents`



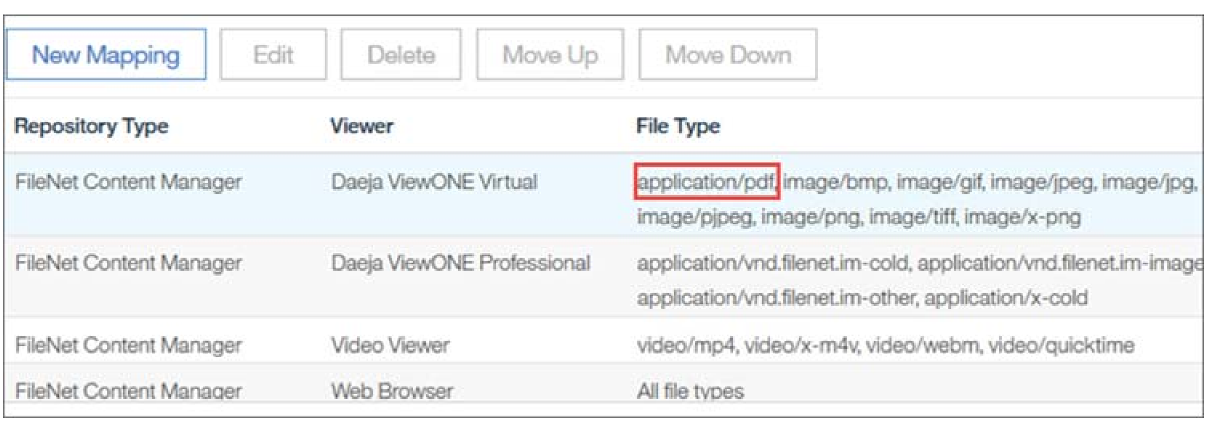
__ 4. In the **Repository type contains** search field, type `FileNet` to filter the list.

All the mappings for **FileNet Content Manager** are shown in the list.

__ 5. Notice that the **Daeja ViewONE Virtual** Viewer row has the **application/pdf** file type that enables PDF files to be opened in the Virtual viewer.

Hint

Use the browser Zoom Out feature to see the complete graphic user interface (GUI). From the browser toolbar, click **View** > **Zoom** > **Zoom Out**.



Repository Type	Viewer	File Type
FileNet Content Manager	Daeja ViewONE Virtual	application/pdf, image/bmp, image/gif, image/jpeg, image/jpg, image/pjpeg, image/png, image/tiff, image/x-png
FileNet Content Manager	Daeja ViewONE Professional	application/vnd.filenet.im-cold, application/vnd.filenet.im-image application/vnd.filenet.im-other, application/x-cold
FileNet Content Manager	Video Viewer	video/mp4, video/x-m4v, video/webm, video/quicktime
FileNet Content Manager	Web Browser	All file types

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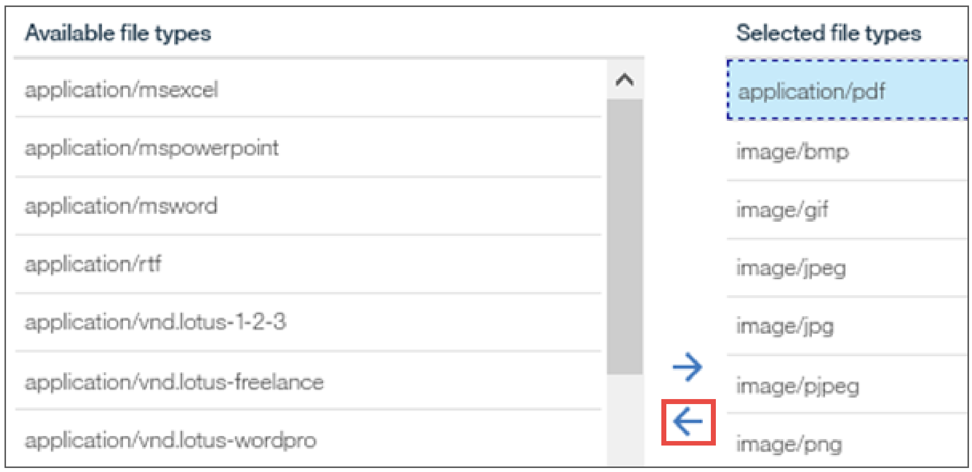
__ 6. Remove the **application/pdf** file type from the viewer mapping.

__ a. Select the **Daeja ViewONE Virtual** Viewer row and click **Edit**.

The **Mapping** page opens.

__ b. In the **Selected file types** pane, select the **application/pdf**.

__ c. Click the left arrow to move it to the **Available file types** pane.



__ d. Click **OK** on the lower right of the page.

This step removes the option to view PDF files in the Daeja ViewONE Virtual Viewer.

__ 7. On the **New Viewer Map** tab, verify that the **application/pdf** file type is no longer listed.

__ 8. Remove the **application/pdf** file type from the **Web Browser** mapping for **FileNet Content Manager**.

Note

IBM Content Navigator selects Web Browser as the first fall-back viewer. For the web client to use the new mapping, you must remove the application/pdf file type from the Web Browser mapping.

__ a. Select the **Web Browser** viewer row for **FileNet Content Manager** and click **Edit**.

__ b. On the **Mapping** page, clear the **All file types** option.

__ c. Select all the items on the **Available file types** pane except **application/pdf** and click the forward arrow to move the items to the **Selected file types** pane.

Hint

Click an item on the **Available file types** pane and click **Ctrl+A** to select all the items. Press **Ctrl** and click **application/pdf** to deselect only that item**.**

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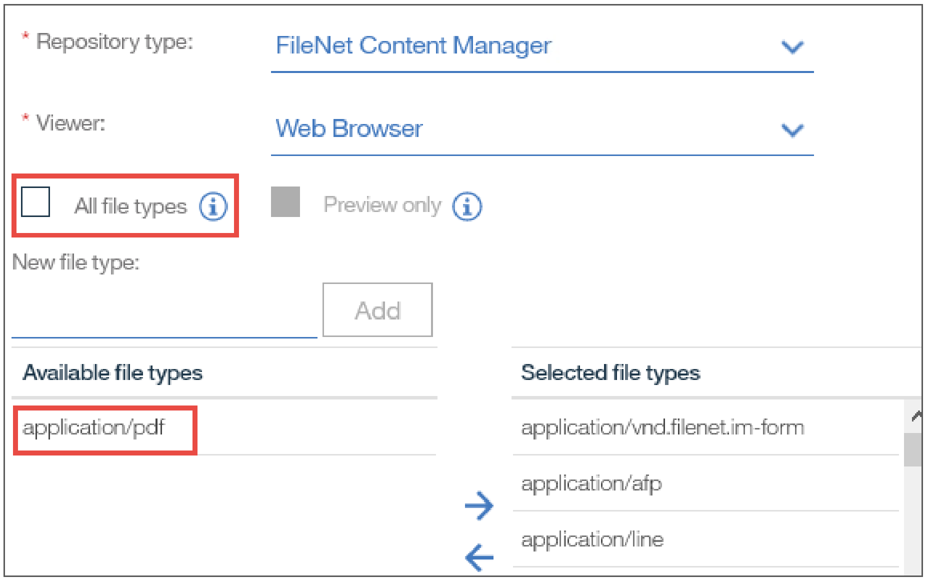


__ d. Click **OK** on the lower right of the page.

This step removes the option to view PDF files in the Web Browser Viewer.

__ 9. On the **New Viewer Map** tab, verify that the **application/pdf** file type is not listed.

__ 10. Create a Mapping for the PDF file type.

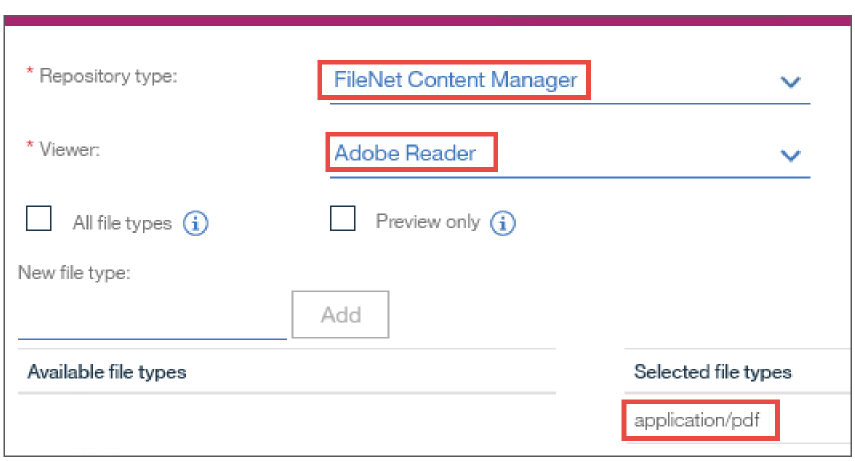
__ a. Click **New Mapping**.

__ b. In the **Repository type** list, select **FileNet Content Manager**.

__ c. In the **Viewer** list, verify that **Adobe Reader** is already selected.

If **Adobe Reader** is not selected, select it.

__ d. Select **application/pdf** from the **Available file types** pane and click the forward arrow to move it to the **Selected file types** pane.



__ e. Click **OK**.

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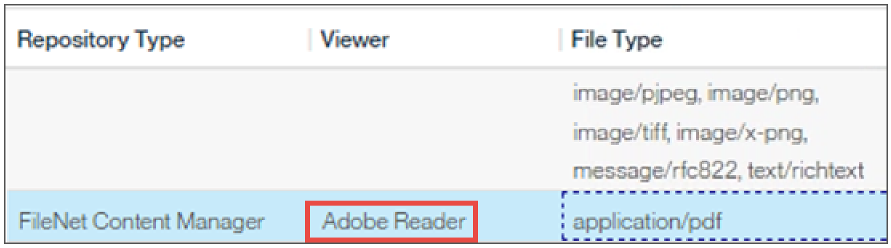
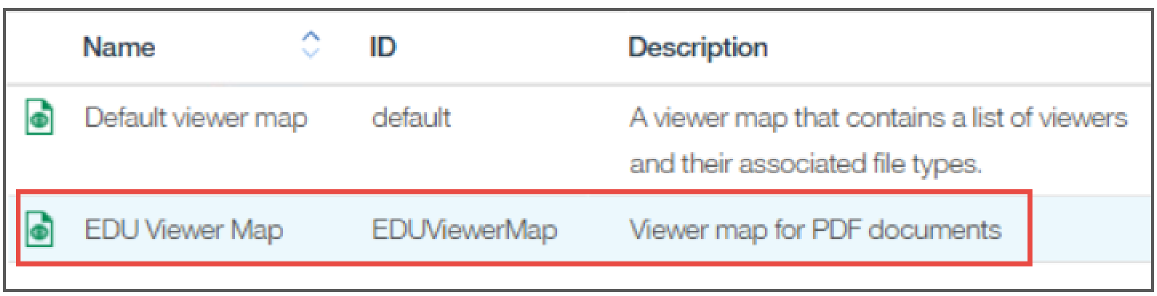
__ f. On the **New Viewer Map** tab, in the **Repository type contains** search field, type `FileNet` to filter the list.

__ g. Verify that the **Adobe Reader** mapping is listed.



__ 11. Click **Save and Close**.

__ 12. On the **Viewer Maps** tab, verify that the newly created viewer map is listed.



__ 13. Close the **Viewer Maps** tab.

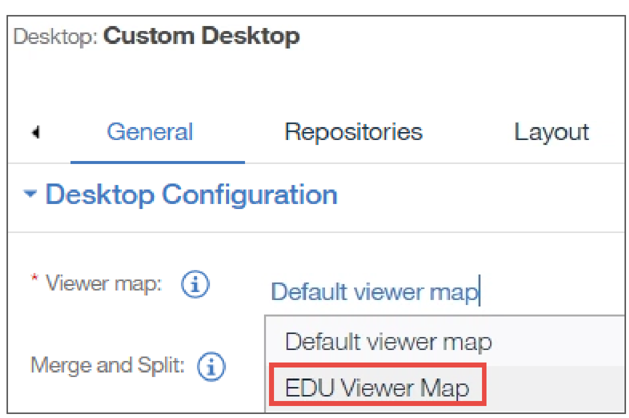
6.3. Assign the new viewer map to your desktop

You replace the existing default viewer map for the desktop with the new one.

__ 1. On the **Desktops** tab, select **Custom Desktop** and click **Edit**.

__ 2. On the **General** tab, scroll down to the **Desktop Configuration** section.

__ 3. For the **Viewer map** list, select **EDU Viewer Map**.



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__ 4. Click **Save and Close**.

__ 5. On the **Information** dialog box, when you are prompted to refresh the browser, click **Close**.

__ 6. Refresh the desktop by refreshing the browser.

__ 7. Leave IBM Content Navigator **Browse** view open for the next section.

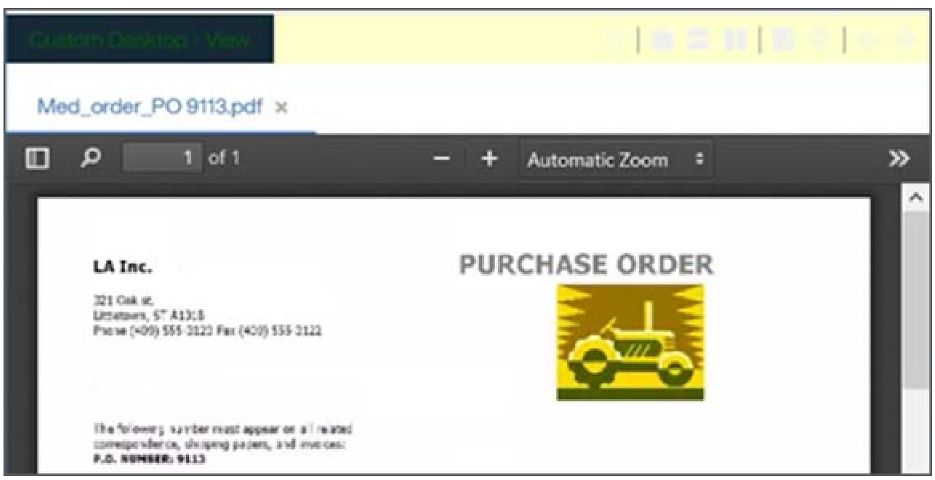
6.4. Test the new viewer map

__ 1. On the left pane, click the **Sales** > **Orders** folder.

__ 2. Double-click **Med_order_PO 9113.pdf**.

__ 3. Verify that the PDF document is opened in Adobe Reader.

There is no side toolbar with annotation tools as you would see on the Daeja ViewOne Virtual viewer.



__ 4. Check the viewer that is used for the PDF document:

__ a. Right-click the document in the viewer.

__ b. Select **This Frame** > **View Frame Info**.

__ c. Verify that the **Referring URL** field shows **adobeReader**.

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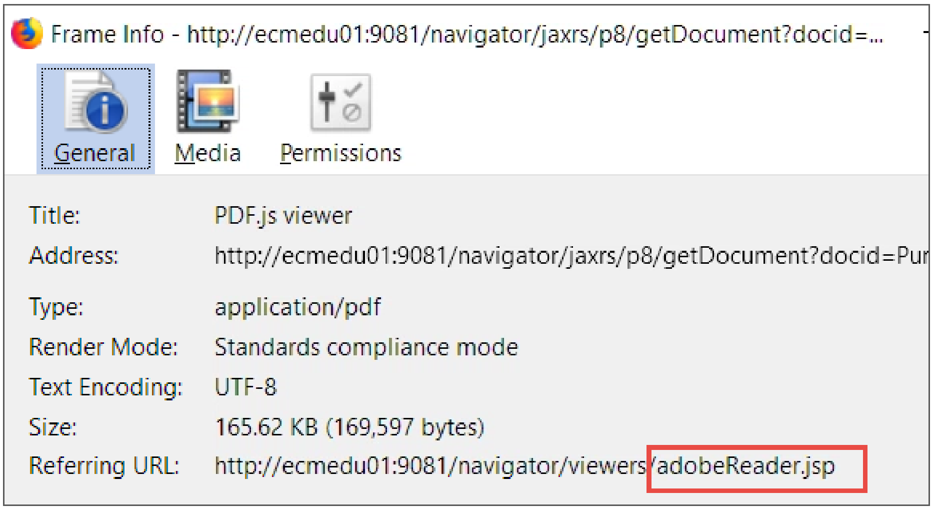
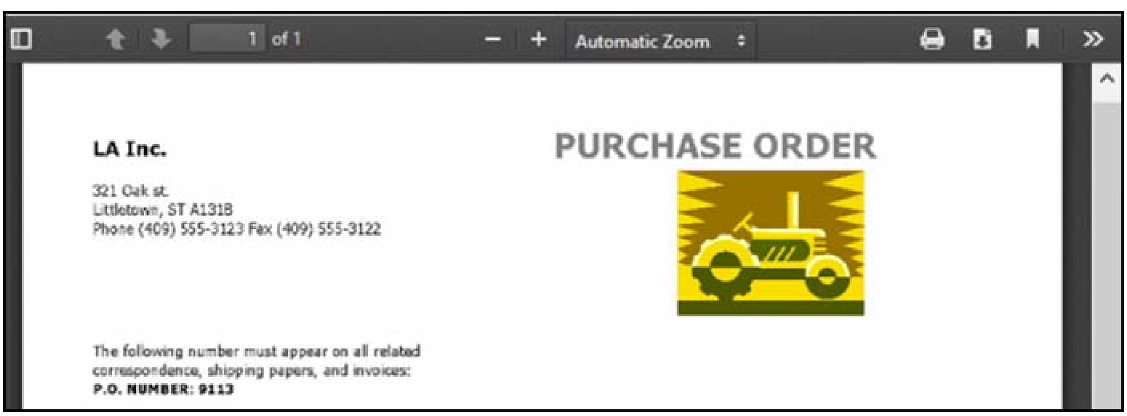


__ 5. Close the windows, log out of IBM Content Navigator, and close the browser.

Information

If you want to use the **Adobe Reader** that is associated with the **Web Browser** to view PDF files, Create a Viewer map with the following steps:

- Remove the **application/pdf** file type from the viewer mapping of the **Daeja ViewONE Virtual Viewer**.
- Leave the default settings for the **Web Browser** viewer mapping.
- No need to create the **Adobe Reader** viewer mapping.



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Section 7. Create a viewer map for Microsoft Word documents

By default, when you open the Microsoft Word documents in IBM Content Navigator, they are opened in the Microsoft Word or Windows WordPad if the Microsoft Word is not installed. You want to open the Microsoft Word documents in the Daeja ViewONE Virtual Viewer to add quick annotations.

In the previous section, you created a custom viewer map and associated it with a desktop. In this section, you edit the custom viewer map to configure the default viewer for the Microsoft Word documents in the FileNet Content Manager repository.

7.1. Check the viewer for Microsoft Word documents

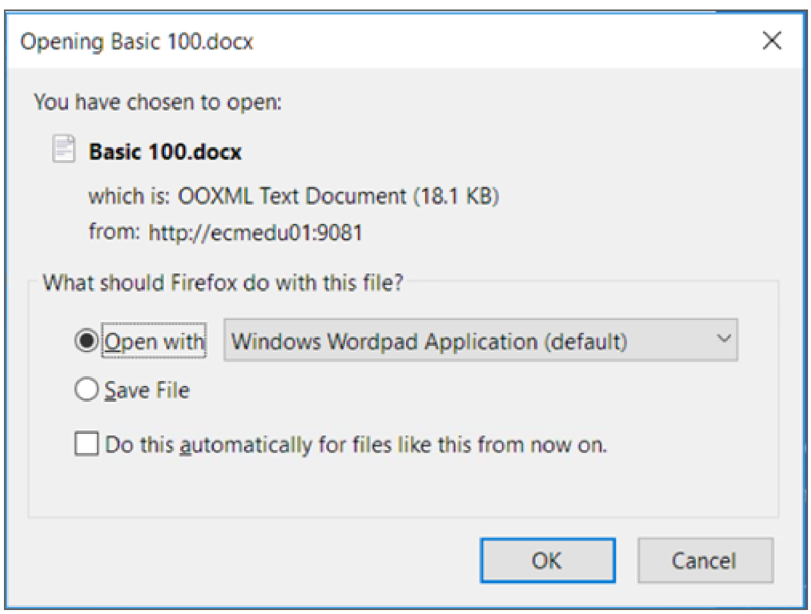
__ 1. Open the **Firefox** browser and log in to **Custom Desktop**.

- **URL**: `http://ecmedu01:9081/navigator/?desktop=CustomDesktop`
- **User ID**: `p8admin`
- **Password**: `FileNet1`

__ 2. In the left pane, click the **Sales** > **Products** folder.

__ 3. Double-click **Basic 100.docx**.

A dialog box prompts you to open the document in the Windows WordPad Application. The Microsoft Word application is not installed on the student system.



__ 4. Click **Cancel** to close the dialog box.

You are going to change the viewer map to open the Word documents in the viewer.

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7.2. Edit the custom viewer map

In this section, you edit the viewer map that you created earlier and change the viewer map to view the Word documents.

__ 1. Switch from the **Browse** view to the **Administration** view.

__ 2. In the left pane, click **Viewer Maps**.

__ 3. On the **Viewer Maps** tab, select **EDU Viewer Map** and click **Edit**.

__ 4. Check the mappings for the FileNet Content Manager repository.

  __ a. In the **Repository type contains** search field, type `FileNet` to filter the list.

  __ b. For any of the **FileNet Content Manager** rows, in the **File Type** column, check that **application/msword** and **application/vnd.openxmlformats-officedocument.wordprocessingml.document** are not listed.

__ 5. Add the file types to Daeja ViewONE Virtual viewer.

  __ a. Select the **Daeja ViewONE Virtual** viewer row and click **Edit**.

  __ b. On the **Mapping** page, in the **Available file types** pane, double-click **application/msword** to move it to the **Selected file types** pane.

  __ c. Repeat the step to add **application/vnd.openxmlformats-officedocument.wordprocessingml.document** to the **Selected file types** pane.

  __ d. Click **OK** in the lower right of the page.

  This step adds the option to view the Word documents in the Daeja ViewONE Virtual viewer.

__ 6. On the **EDU Viewer Map** tab, verify that the file types that you added are listed.

__ 7. Remove the file types from the Web Browser mapping for FileNet Content Manager.

  __ a. For **FileNet Content Manager**, select the **Web Browser** viewer row and click **Edit**.

  __ b. On the **Mapping** page, in the **Selected file types** pane, double-click **application/msword** to move the item to the **Available file** types pane.

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__ c. Repeat the step to move **application/vnd.openxmlformats-officedocument.wordprocessingml.document** to the **Available file** types pane.

__ d. Click **OK** in the lower right of the page.

This step removes the option to view Microsoft Word documents in the Web Browser viewer.

__ 8. On the **EDU Viewer Map** tab, for the **Web Browser** viewer, verify that the two file types that you removed are not listed.

__ 9. Click **Save and Close**.

__ 10. Close the **Viewer Maps** tab.

__ 11. Refresh the desktop by refreshing the browser.

__ 12. Leave IBM Content Navigator **Browse** view open for the next section.

7.3. Test the edited viewer map

In the previous section, you already assigned the EDU Viewer Map to your custom desktop.

__ 1. In the **Sales** > **Products** folder, double-click **Basic 100.docx**.

__ 2. Verify that the document opens in the Daeja ViewONE Virtual Viewer.

__ 3. Log out of IBM Content Navigator and close the browser.

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Section 8. Register a Plug-in

In this section, you register a sample plug-in that is provided with the IBM Content Navigator installation.

8.1. Register a plug-in

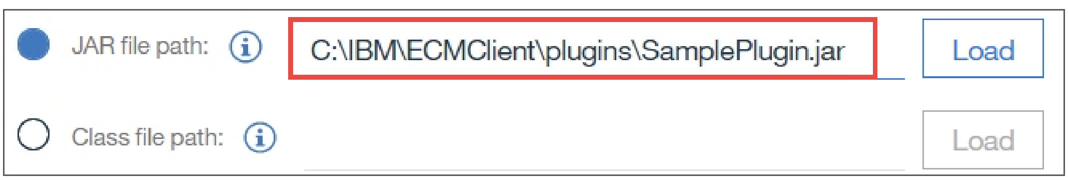
__ 1. In the Firefox browser, log in to the IBM Content Navigator administration tool.

- The **ICN Admin** shortcut or **URL**: `http://ecmedu01:9081/navigator/?desktop=admin`
- **User name**: `p8admin`
- **Password**: `FileNet1`

__ 2. On the left pane, click **Plug-ins**.

__ 3. On the **Plug-ins** tab, click **New Plug-in**.

__ 4. On the **New Plug-in** tab, select the **JAR file path** option and enter: `C:\IBM\ECMClient\plugins\SamplePlugin.jar`



Hint

In Windows Explorer, go to the location of the file. Copy and paste the directory and the file name to avoid typing errors.

Information

When you register the plug-in from a different system, the plug-in file on the IBM Content Navigator (ICN) server must be accessible. For this course, you register the plug-in on the system where the ICN server is installed and so you use a local path.

__ 5. Click **Load**.

If the file path is valid, the page shows more information as defined for the plug-in.

__ 6. In the **Config Param 1**, **Config Param 2**, and **Config Param 3** fields, enter the values: `string1`, `string2`, and `integer3`

The fields that have a red star are required fields. For this section, you can enter any string value.

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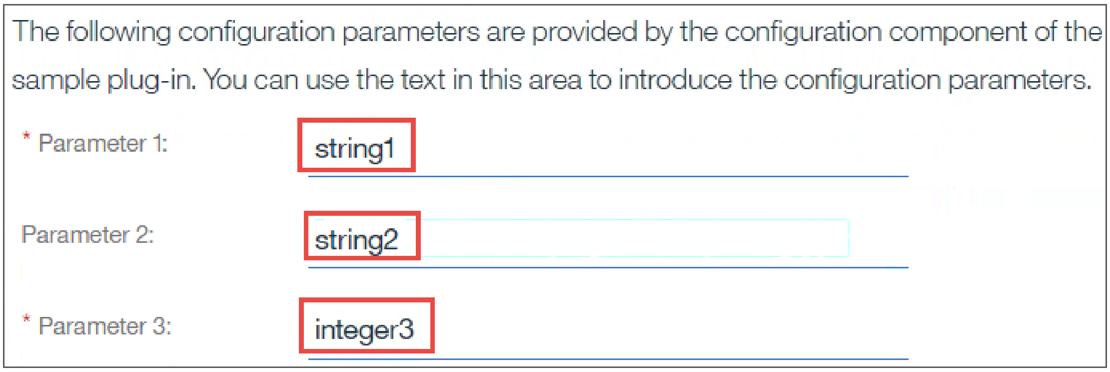
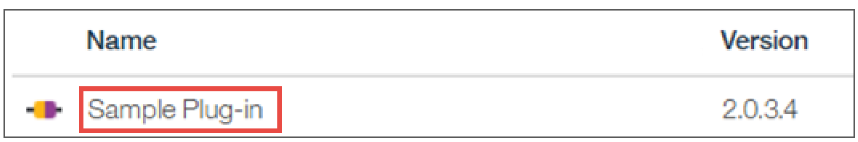
Hint

If you are not able to see all the fields, maximize the browser.



__ 7. Click **Save and Close**.

__ 8. On the **Plug-ins** tab, click **Refresh** and then verify that the new plug-in is listed.



__ 9. Close the **Plug-ins** tab and leave the IBM Content Navigator administration tool opened for the next section.

8.2. Test the plug-in

The sample plug-in deployment adds several functions to IBM Content Navigator. In this section, you verify that the functions are added.

the IBM Content Navigator administration tool is open from the previous section and you are logged in as p8admin.

__ 1. On the **Desktops** tab, select **Sample Desktop** and click **Edit**.

__ 2. On the **Sample Desktop** tab, click the **Layout** subtab.

__ 3. Verify that the sample plug-in added a new layout.

__ a. In the **Desktop Features** section, click the down arrow next to the **Layout** label to expand the list.

__ b. Verify that **SampleLayout** is listed.

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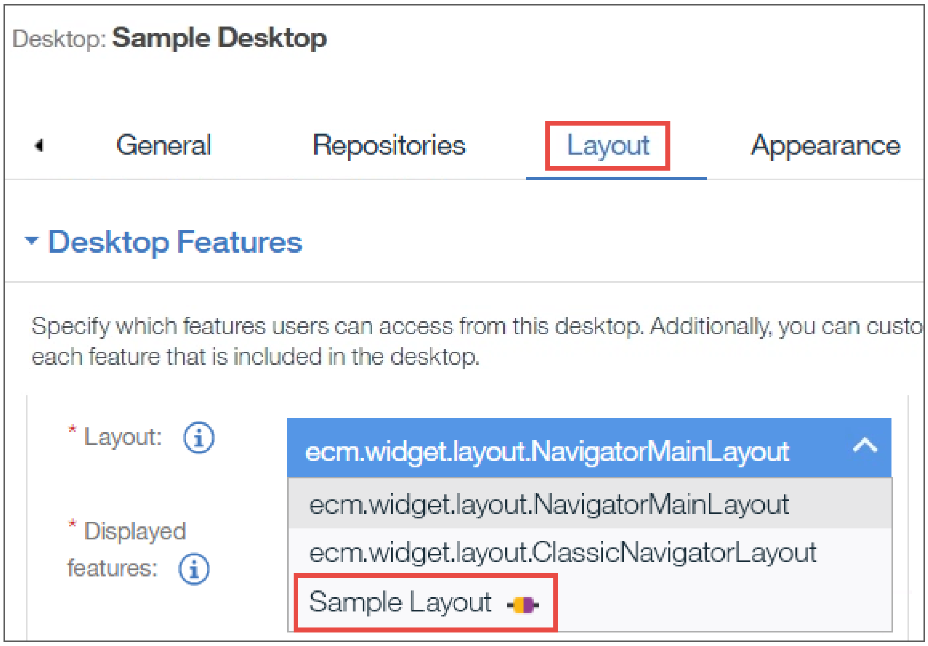
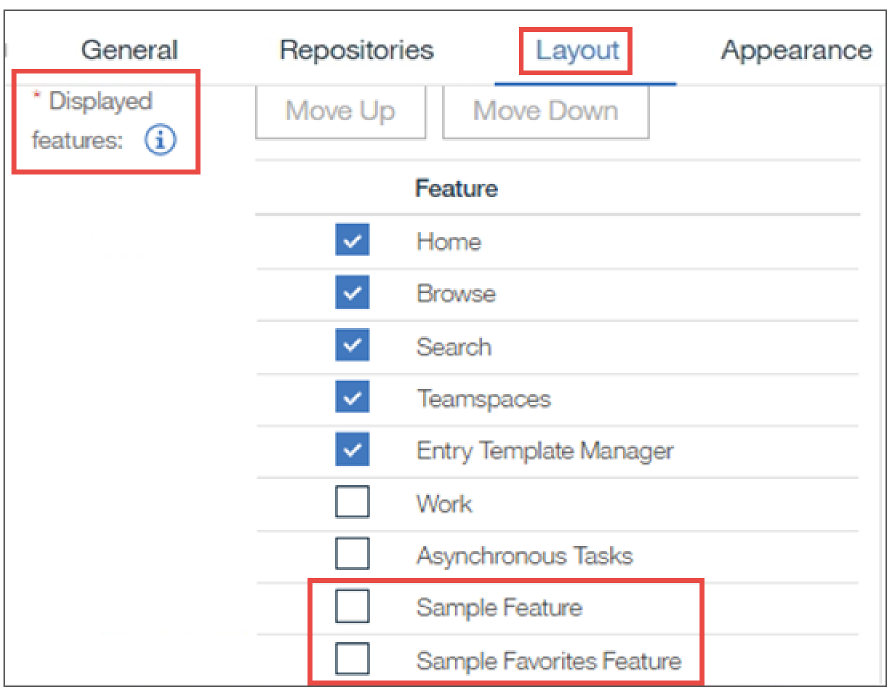


__ 4. Scroll down to the **Displayed features** section and verify that **Sample Feature** and **Sample Favorites Feature** are listed.



__ 5. Click **Close** to close the **Sample Desktop** tab.

__ 6. Verify that the sample plug-in added new menu items.

__ a. In the left pane, click **Menus**.

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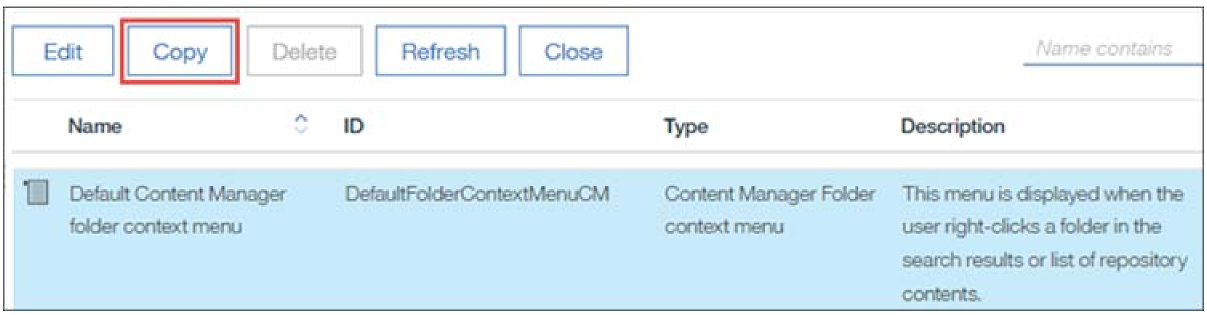
__ b. On the **Menus** tab, select the **Default Content Manager folder context menu** and click **Copy**.

Hint

You can search for a menu. Enter the menu name on the **Name contains** field and press enter to filter the list.



The **New Menu** tab opens.

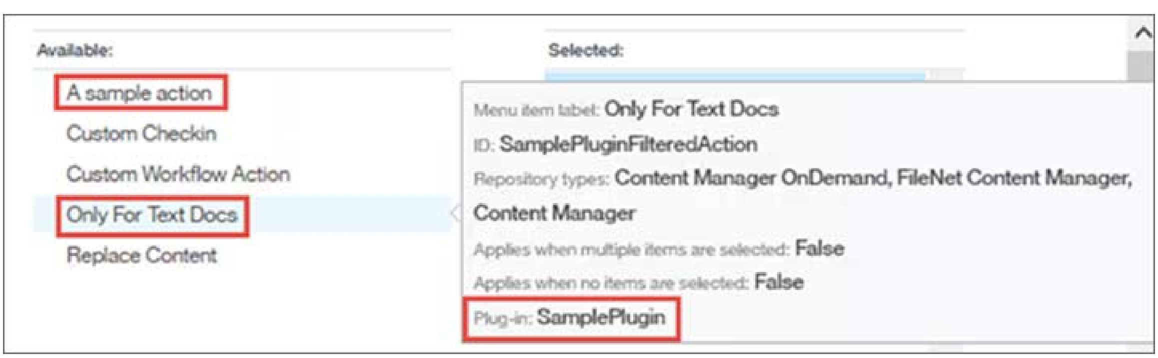
__ c. Scroll down to the **Available** pane and verify that the following new menu items from the sample plug-in are listed: **A sample action** and **Only for Text Docs**

Hint

Use the browser Zoom Out feature to see the complete graphic user interface (GUI). From the browser toolbar, click **View** > **Zoom** > **Zoom Out**.

__ d. Hover the mouse over a menu item to see its details.

The details for the **Only For Text Docs** menu item are shown in the screen capture**.**



__ e. Click **Close** and log out of IBM Content Navigator and close the browser.

End of exercise

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Exercise review and wrap-up

This exercise showed how to customize various components of a IBM Content Navigator desktop: appearance, banner, login page, menus, icons, labels, viewer map, and plug-in

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Exercise 4. Configuring Entry Templates

Estimated time

01:30

Overview

In this exercise, you learn how to configure entry template management and build entry templates.

Objectives

After completing this exercise, you should be able to:

- Configure entry template management
- Build an entry template to add documents
- Associate entry templates with a folder
- Customize property layouts for entry templates

Introduction

Entry templates automate the process of adding content to your repository. In this exercise, you configure Entry Templates Management in the IBM Content Navigator administration tool. You learn about how to build entry templates to add content to a repository. You also customize the property layout that is used in the entry templates.

This exercise includes the following sections:

Requirements

The activities in this unit assume that you have access to the student system that is configured for these activities and all components are running when you begin an exercise.

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Section 1. Configure entry template management

In this section, you configure entry template management for repositories and desktops.

1.1. Configure entry template management for a repository

Important

Before you begin the exercise, ensure that the components are running. If you did not start the components already, refer to Section 1, "Prepare your system: Start the components," on page 1-3 to start them.

__ 1. Start the IBM Content Navigator administration tool.

__ a. Open the Firefox browser and click the **ICN Admin** shortcut. Or go to the **URL**: `http://ecmedu01:9081/navigator/?desktop=admin`

__ b. Enter the following credentials:

- **User name**: `p8admin`
- **Password**: `FileNet1`

__ c. Click **Log in**.

__ 2. Open the **Sales** repository for editing.

__ a. From the left pane, click **Repositories**.

__ b. On the **Repositories** tab, select **Sales** and click **Edit**.

__ 3. In the **General** subtab, scroll down and click **Connect**.

__ 4. When prompted, log in to the repository:

- **User name**: `p8admin`
- **Password**: `FileNet1`

__ 5. Select the **Configuration Parameters** subtab, scroll down to the **Optional Features** section, and expand the section.

__ 6. For the **Entry template management** field, select **Enable**.

In the following steps, you assign roles for managing the entry templates.

__ 7. In the **Entry template management** section, click **X** next to **Managers** and **#REALM-USERS(EXT_ADAM)** and verify these groups are removed.

__ 8. Add a user.

__ a. Click **Select Users and Groups**.

__ b. On the **Add Users and Groups** page, for the **Search for** field, select **Users**.

__ c. Search for **Misty** and move the user from the **Available** pane to the **Selected** pane.

__ d. At the end of the page, select **Creators** for the **Permissions** field and click **Add**.

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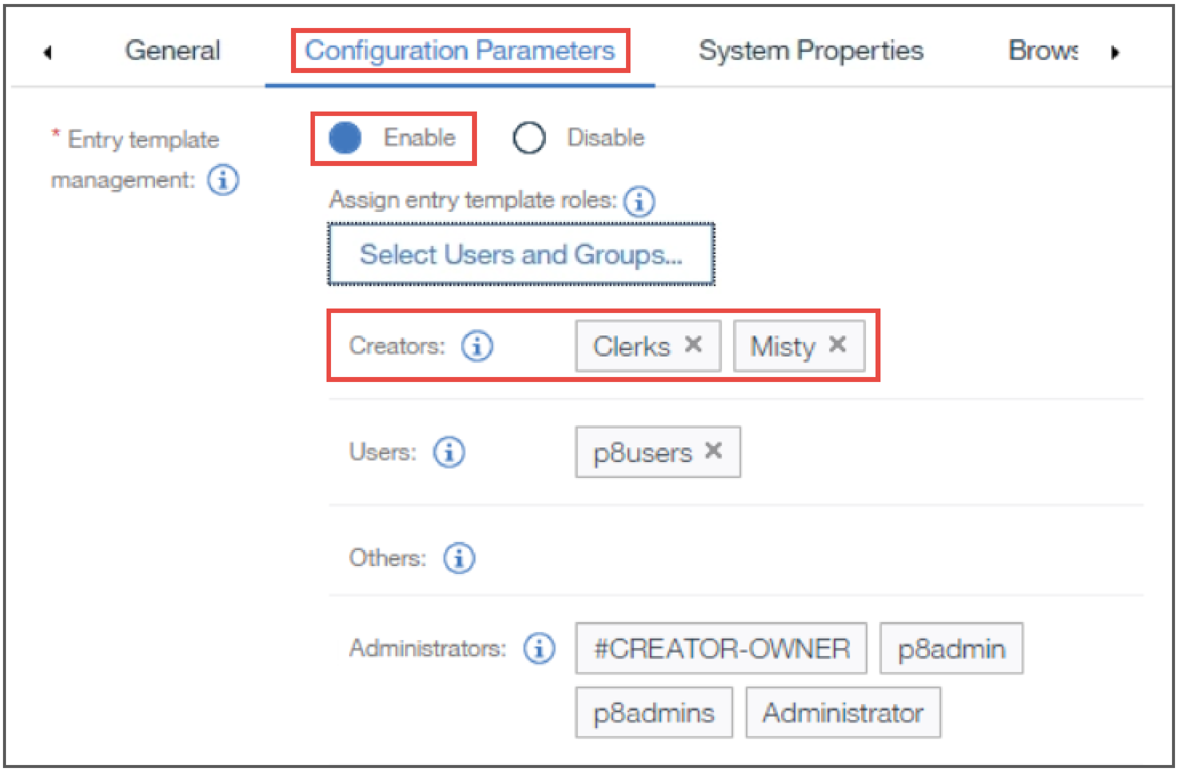
__ 9. In the **Entry template management** section, verify that **Misty** is added to the **Creators** list.



__ 10. Click **Save and Close** to save the changes to the repository.

__ 11. Close the **Repositories** tab.

__ 12. Leave IBM Content Navigator open for the next section.

1.2. Add the Entry Template Manager feature to a desktop

__ 1. Open the **Sample Desktop** for editing.

__ a. On the **Desktops** tab, select **Sample Desktop**.

__ b. Click **Edit**.

__ 2. On the **Sample Desktop** tab, click the **Layout** subtab.

__ 3. On the **Layout** subtab, in the **Displayed features** section, select **Entry Template Manager**.

__ a. On the rightmost pane, for **Default repository**, verify that **Sales** is selected.

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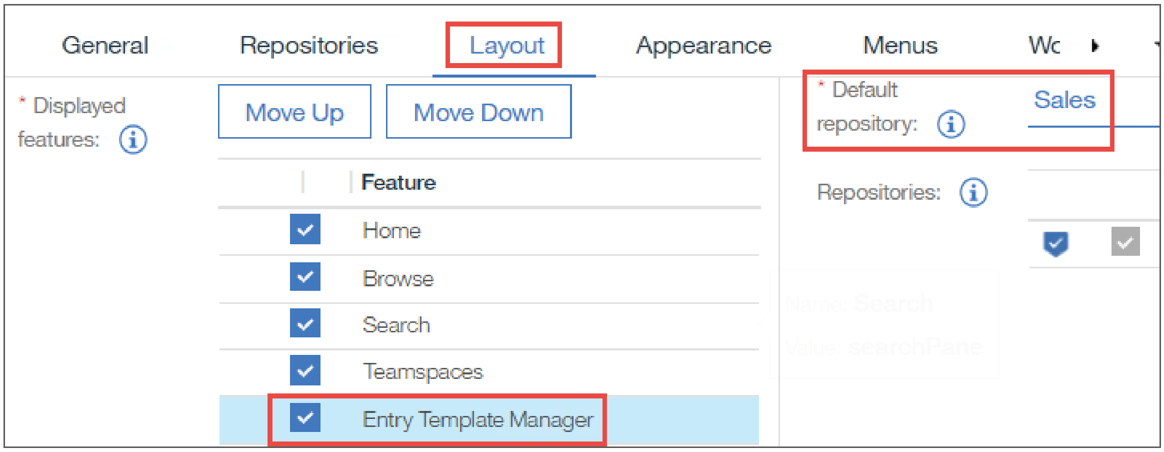
If it is already not selected, select **Sales** from the list.



__ b. Click **Save and Close** to save the changes to the desktop.

__ c. When you are prompted to refresh the browser, click **Close**.

__ 4. Log out of IBM Content Navigator and close the browser.

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Section 2. Build an entry template to add documents

In this exercise, you build an entry template on the **Entry Template Manager** view.

2.1. Open Entry Template Manager in IBM Content Navigator

__ 1. Open the Firefox browser and log in to the IBM Content Navigator **Sample Desktop**.

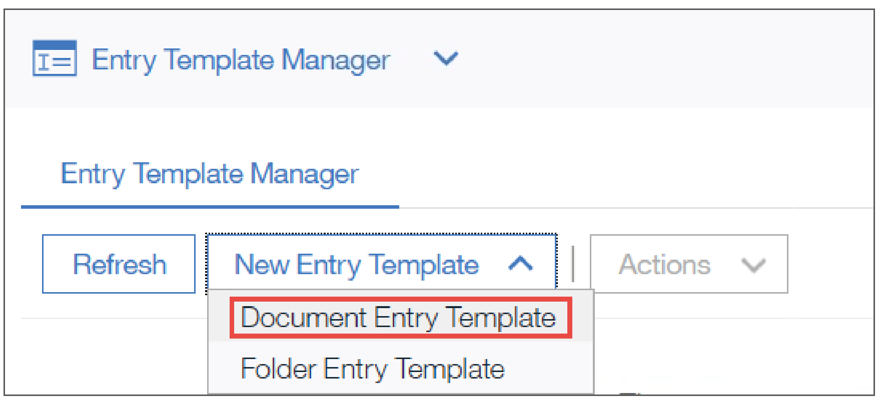
- The **Sample Desktop** shortcut or **URL**: `http://ecmedu01:9081/navigator/?desktop=SampleDesktop`
- **User name**: `p8admin`
- **Password**: `FileNet1`

__ 2. Click the down arrow next to **Browse** and select **Entry Template Manager**.

The **Entry Template Manager** view opens.

2.2. Define the document entry template

__ 1. Click **New Entry Template** and select **Document Entry Template** from the list.



__ 2. Define the Entry Template:

__ a. Use the data in the following table and the steps to define the entry template.

Item	Value
Name for the Entry template	`EDU Entry Template`
Description	`A sample entry template`
Save in location	The **Sales** > **Entry Templates** folder
Inherit the security settings from the parent folder	Select the option
Users for the **Share with** field	`Clerks, p8admin`
All other options	Leave the defaults

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__ b. For **Name**, enter `EDU Entry Template`.

__ c. For **Description**, enter `A sample entry template`.

__ d. In the **Save in** field, verify that the **Sales** repository is listed.

__ e. Click the down arrow, select **Entry Templates** and click **OK**.

__ f. Select the **Inherit the security settings from the parent folder** option.

This option inherits the security settings from the folder where this template is saved.

__ 3. Select users who can use this entry template:

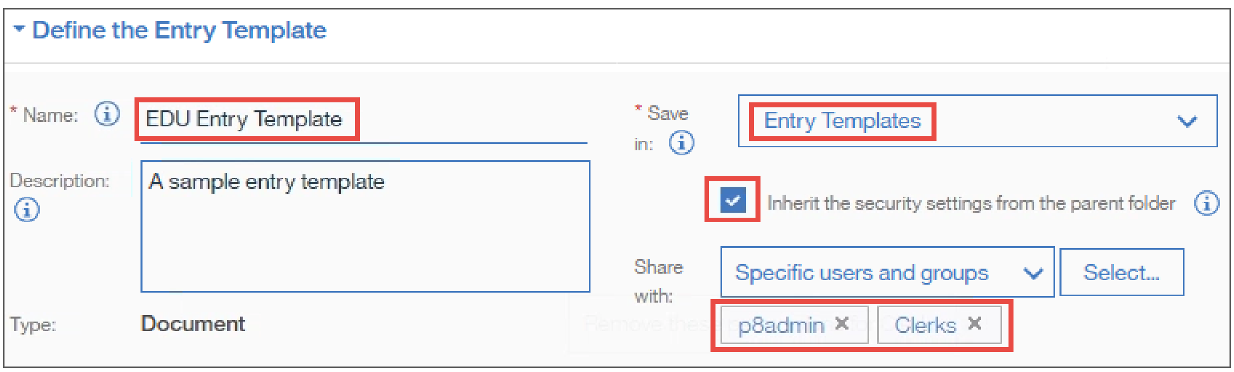
__ a. In the **Share with** list, select **Specific users and groups**.

__ b. On the **Add Users and Groups** dialog box, in the **Search for** list, select **Groups**.

__ c. Search for **Clerks** and move the user from the **Available** pane to the **Selected** pane.

__ d. Repeat the step for **p8admin** (**User**).

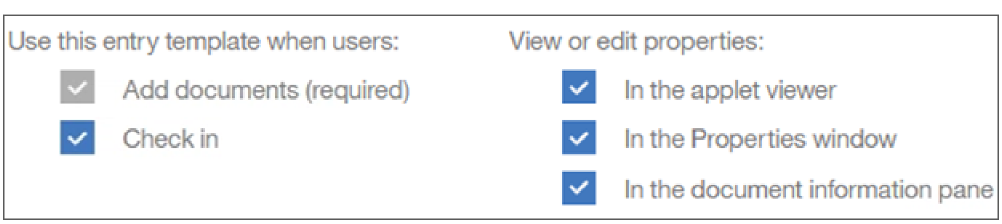
__ e. Click **Add.**



The following options control when the entry template is used.

- Use this entry template when users: **Add documents (required)** and **Check in**
- View or edit properties: **In the applet viewer**, **In the Properties window**, and **In the document information pane**.

__ 4. Verify that all the options are selected.



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2.3. Set the Item Storage Location

This setting automatically stores the documents that are created with the entry templates in the specified location.

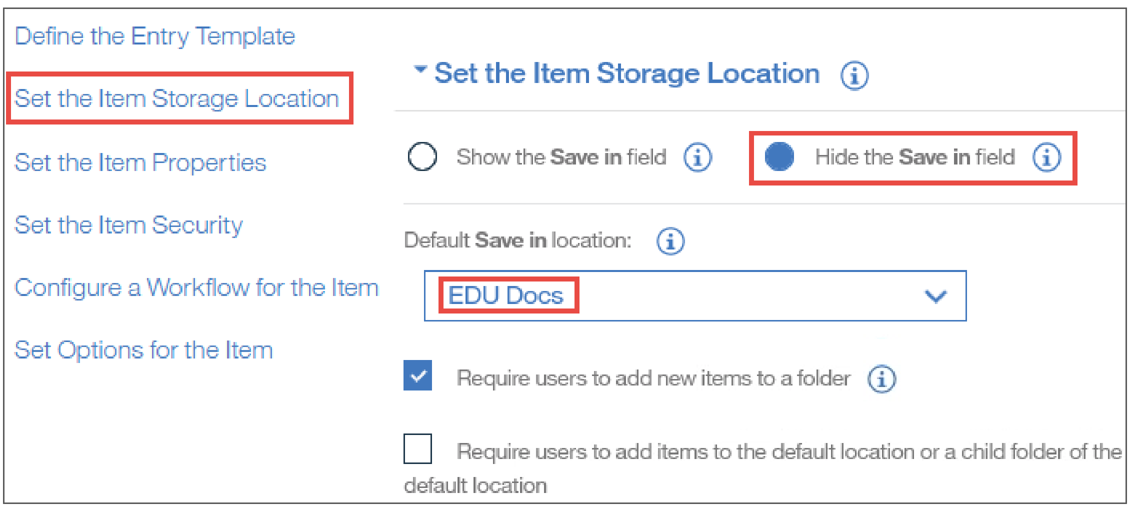
__ 1. On the left pane, select **Set the Item Storage Location**.

__ 2. Use the data in the following table and the steps to set the location for the documents.

Item	Value
Hide the Save in field	Select the option
Default Save in location	**Sales** > **EDU Docs** folder
All other options	Leave the defaults

__ a. Select the **Hide the Save in** field option.

__ b. For the **Default Save in location** list, select the **EDU Docs** folder, and click **OK**.



Note

If you choose the **Show the Save in field** option, you can also select one or both of the following options:

- Require users to add new items to a folder
- Require users to add items to the default location or a child folder of the default location

For this exercise, the two options have no effect since this section is hidden from the users.

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2.4. Set the Item Properties

__ 1. On the left pane, select **Set the Item Properties**.

__ 2. Use the data in the following table and the steps to set properties for the documents.

Item	**Value**
Show the Properties section	Select the option
Class	Product
Hide the class	Select the option
All other options	Leave the defaults

__ a. Leave the default value: **Show the Properties section**

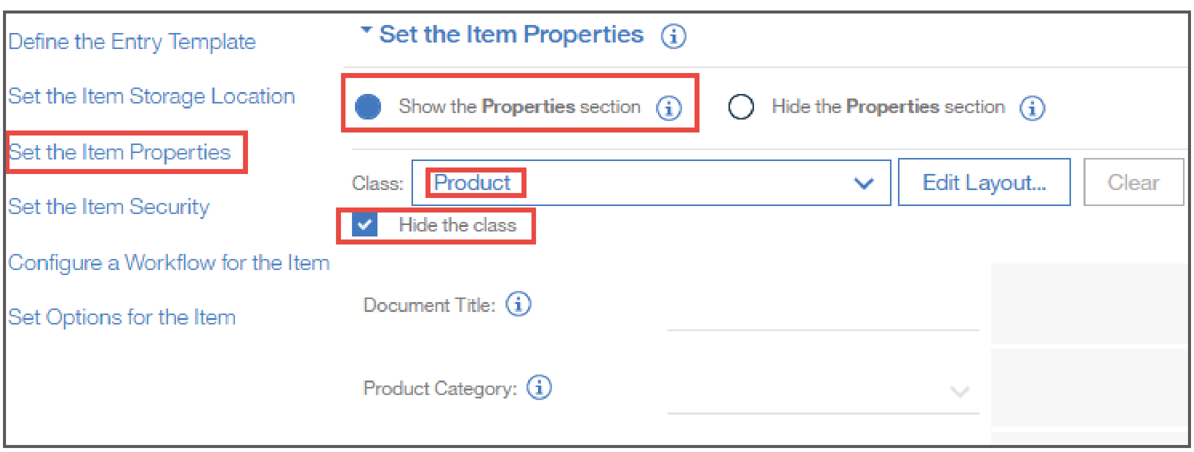
__ b. In the **Class** list, select **Product** and click **OK**.

A list of properties for the Product class is shown.

The list of properties depends on the class selected. You reorder the property list by using the Edit Layout tool in the next lesson.

__ c. Select the **Hide the class** option.

This option hides the class selection when the users add the documents.



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2.5. Set the Item Security

__ 1. On the left pane, select **Set the Item Security**.

__ 2. Use the data in the following table and the steps to set security for the documents.

Item	**Value**
Show the Security section	Select the option
Override the security defined by the selected class	Select the option
Share with	`Clara` as **owner**
Inherit the security from the parent folder	Select the option

__ a. Leave the default value: **Show the Security section**

__ b. If it is not selected, select **Override the security defined by the selected class**.

__ c. Add more users to the security:

__ d. In **Share with**, click **Select** next to **Specific user and groups**.

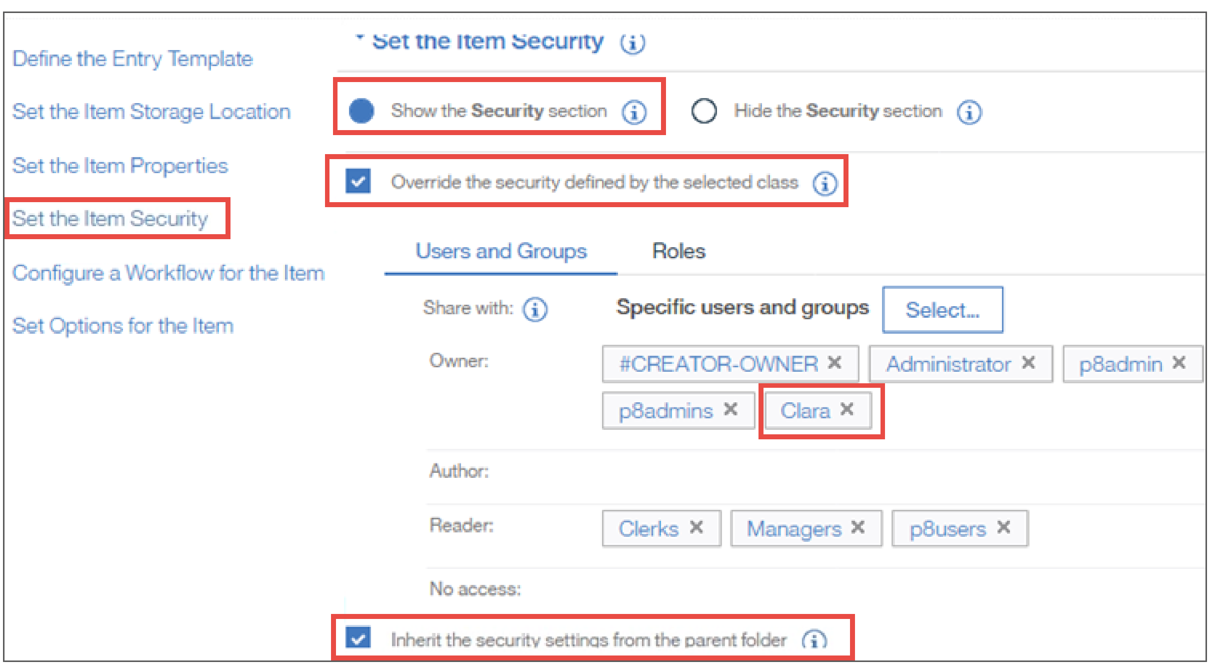
__ e. In the **Add permissions** dialog box, for the **Search for** field, select **Users**.

__ f. Search for **Clara** and move the user from the **Available** pane to the **Selected** pane.

__ g. At the end of the dialog box, for **Permissions**, select **Owner** and click **Add**.

__ h. In the **Set the Item Security** section, verify that **Clara** is added to the **Owner** list.

__ 3. Select the **Inherit the security settings from the parent folder** option.



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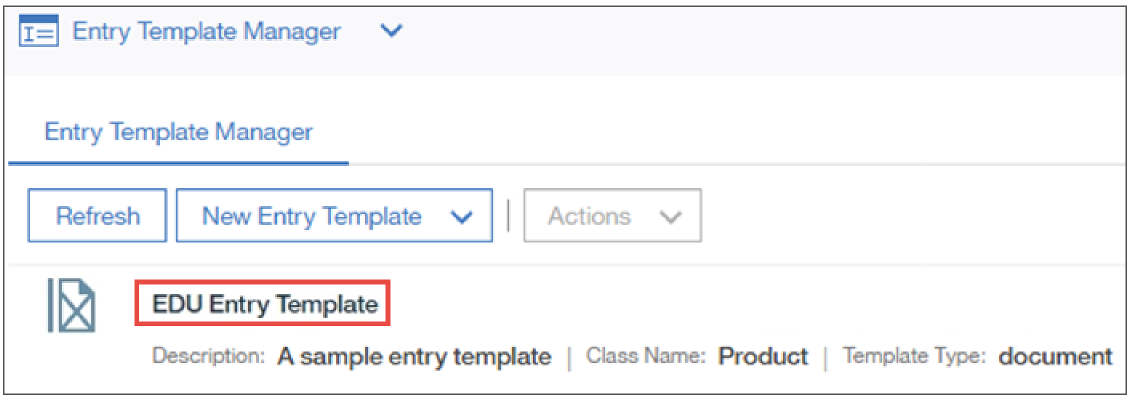
Note

You can specify a workflow to be triggered when documents are added. The topic of workflows is presented in detail in the IBM Case Foundation 5.2.1 courses. For this exercise, you skip the Configure a Workflow for the item section.

__ 4. Click **Save and Close**.

__ 5. In the **Entry Template Manager** tab, verify that **EDU Entry Template** is listed.



2.6. Test the new entry template

__ 1. On the **Entry Template Manager** tab, click the **EDU Entry Template** link.

The **Add Document by Using Entry Template** page opens.

__ 2. In the **What do you want to save** list, check that **Local Document** is selected.

__ 3. Click **Browse** and navigate to **C:\Training\WF270G\SampleDocs\MarketingPlan1.pdf** and click **Open**.

In the **Properties** section, the **Document Title** field is populated with the file name.

__ 4. Notice that the **Class** field is hidden as you configured.

__ 5. Use the data in the following table to enter values for the properties.

Item	**Value**
Product Category	Basic
Product ID	ABM172
Product Quantity	25
Product Description	A new product
Product Price	200

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Values are not important, but they must match the data type. Click the Information icon for the property to view the data type details.

__ 6. Review the security settings that are applied by the template.

__ 7. In the lower right of the page, click **Add**.

__ 8. Verify that the document is added to the **EDU Docs** folder.

  __ a. Switch from the **Entry Template Manager** view to the **Browse** view.

  __ b. On the left pane, click the **Sales** > **EDU Docs** folder.

  __ c. Verify that a document is listed with the name: **MarketingPlan1.pdf** and with today's date.

  __ d. Single-click the document to see the properties in the **Properties** pane on the lower right.

  If the properties are not shown, click the three vertical dots on the right end of the page to expand the **Properties** pane.

  __ e. Verify that the property values that you entered are shown.

__ 9. Leave IBM Content Navigator open for the next exercise.

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Section 3. Associate entry templates with a folder

In this exercise, you associate an entry template with a folder. This ensures that the entry template is invoked when users add a document to the folder.

3.1. Associate an entry template to a folder

__ 1. If you logged out, log in to the IBM Content Navigator Sample Desktop.

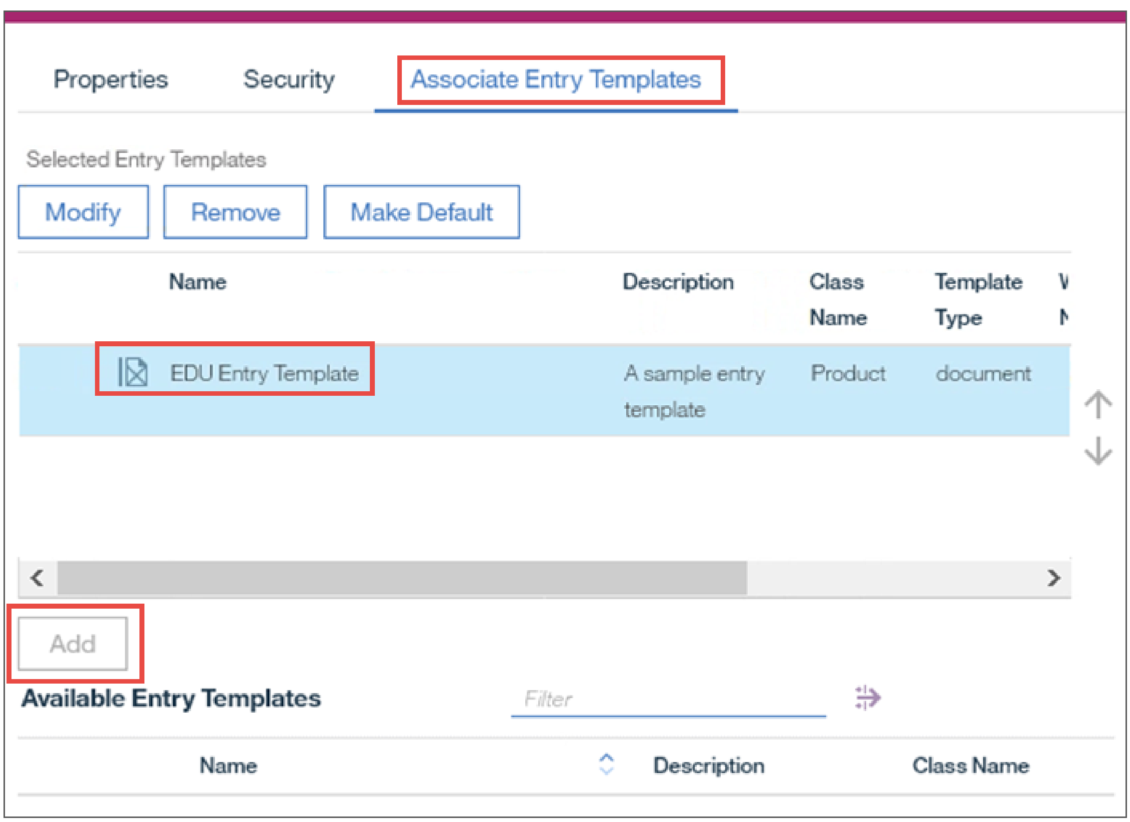
- **Sample Desktop** shortcut or URL:
  `http://ecmedu01:9081/navigator/?desktop=SampleDesktop`
- **User ID**: `p8admin`
- **Password**: `FileNet1`

__ 2. On the **Browse** view, right-click the **EDU Docs** folder and select **Properties** from the menu list.

__ 3. On the **Properties** page, select the **Associate Entry Templates** tab.

__ 4. In the **Available Entry Templates** list at the lower pane, select **EDU Entry Template** and click **Add**.

The entry template is added to the **Selected Entry Templates** pane.



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Note

You can select more than one entry template and add them to the **Selected Entry Templates** pane.

If there is more than one entry template, you can set one of them as the default.

You have the following options for a entry template: **Make Default**, **Modify**, and **Remove**.

__ 5. In the lower right of the page, click **Save**.

__ 6. Refresh the **Browse** view by refreshing the browser.

3.2. Test the entry template association to a folder

__ 1. Add a document to test the configuration.

  __ a. On the left pane, click the **EDU Docs** folder.

  __ b. On the top menu bar, click **Add Document**.

__ 2. Verify that the associated entry template is automatically applied.

  __ a. Notice that the **Class** field is hidden as you configured. But the properties for the **Product** class are automatically listed.

  __ b. Click **Cancel**.

__ 3. Leave the IBM Content Navigator open for the next section.

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Section 4. Customize property layouts for entry templates

In this section, you modify the default property layout for the entry template that you built.

4.1. Edit the entry template

If the IBM Content Navigator **Sample Desktop** is open, skip to the step 2.

__ 1. Open the Firefox browser and log in to the IBM Content Navigator **Sample Desktop**.

- The **Sample Desktop** shortcut or URL:
  `http://ecmedu01:9081/navigator/?desktop=SampleDesktop`
- **User name**: `p8admin`
- **Password**: `FileNet1`

__ 2. Switch from the **Browse** view to the **Entry Template Manager** view.

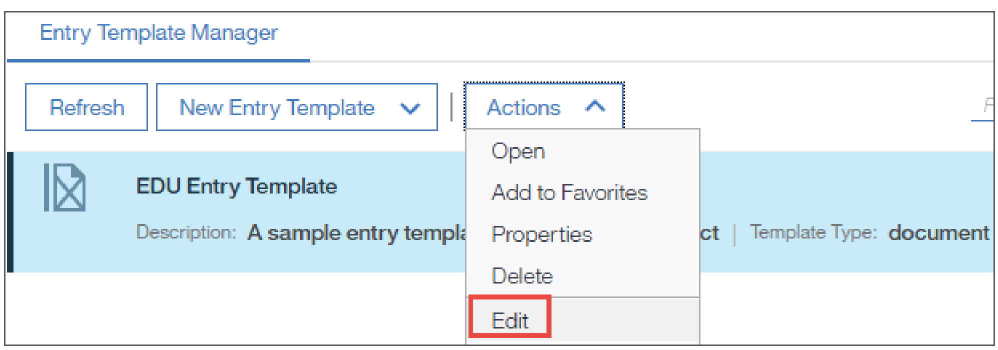
__ 3. Select **EDU Entry Template** and from the **Actions** menu, click **Edit**.

You can also right-click **EDU Entry Template** and click **Edit**.

Hint

When you select the entry template, click the space away from the entry template name link. If you click the link or double-click the entry, the entry template opens in a separate page.

If the entry template opens in a separate page, click **Cancel** to go back.



__ 4. In the **EDU Entry Template** tab, on the left pane, click **Set the Item Properties**.

__ 5. Click **Edit Layout**.

Note

If you are not able to see all the elements on the page, you can maximize your browser to have more working space. You can use the browser's zoom settings: View > Zoom > Zoom Out

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4.2. Add a layout

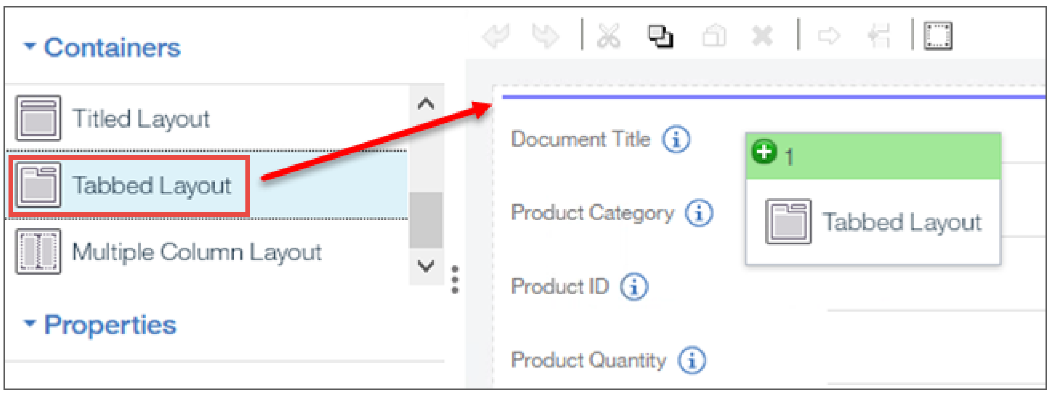
__ 1. Hover over a layout to see more details about that layout.

__ 2. In the **Containers** section, select **Tabbed Layout**.

__ 3. Drag it to the space above the **Document title** field.

When you drag the layout, a blue line appears.

__ 4. Notice that the tab color changes from red to green when it is ready to release the control.



__ 5. After you release the mouse, a Tabbed section with two tabs is added above the Document Title property.

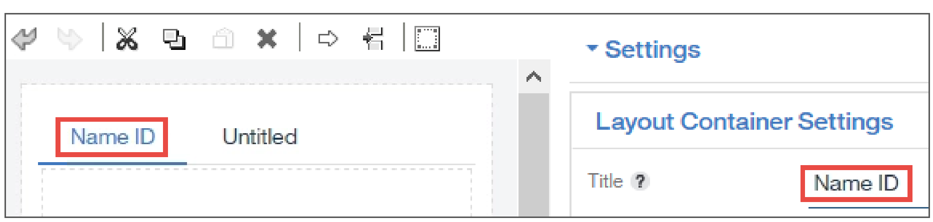
__ 6. Label the tabs.

__ a. Select the first **Untitled** tab.

Its configuration is shown in the **Settings** pane on the upper right.

__ b. In the **Layout Container Settings** section, for the **Title** field, enter `Name ID`.

The **Untitled** tab changes to the name: **Name ID**.



__ c. For the second **Untitled** tab, enter the **Title**: `Information`

__ d. Click **Save**.

__ 7. Add another tab.

__ a. Select the **Information** tab.

__ b. On the toolbar, click the **Insert** icon and select **Insert After**.

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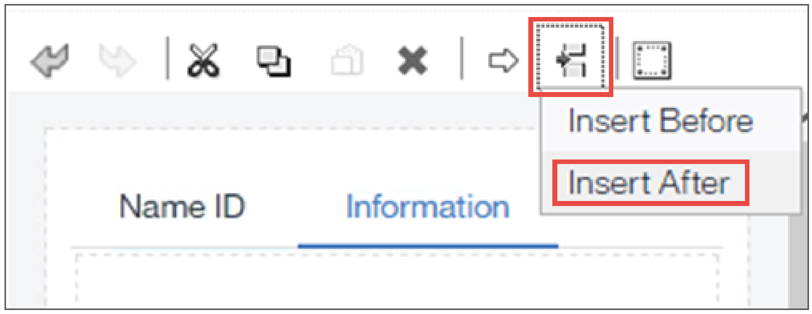


An **Untitled** tab is added next to the **Information** tab.

__ c. Change the **Title** to **Other**.

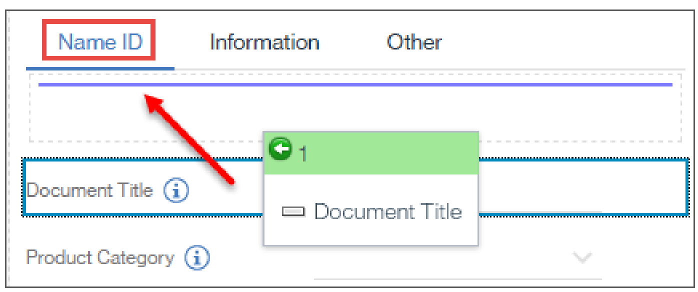
4.3. Add properties to the tabs

__ 1. Select the **Name ID** tab.

__ 2. Click and drag the **Document Title** property to the space in **Name ID** tab.

When you drag the property, a blue line is shown.

__ 3. Notice that the tab color changes from red to green when it is ready to release the control.



__ 4. Repeat the step to add **Product Category** and **Product ID** to the **Name ID** tab.

__ 5. Drag **Product Description**, **Product Price**, and **Product Quantity** to the **Information** tab.

__ 6. On the lower left of the page, select the **Test** tab to preview the layout and then switch back to **Design** tab.

Hint

Optionally, experiment with changing values for different fields in **Settings**. Switch to the **Test** tab to preview the changes you made.

Examples:

- Change Layout direction to Horizontal
- Change Label position to Beside
- Change Height or Width

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__ 7. Click **Save and Close** to save the layout changes.

4.4. Modify the settings for a property

__ 1. On the **EDU Entry Template** tab, select **Set the Item Properties** and click **Edit Layout**.

__ 2. Select the **Name ID** tab and click the **Document Title** property.

__ 3. On the right pane, in the **Property Settings** section, in the **Label** field, type `Title`.

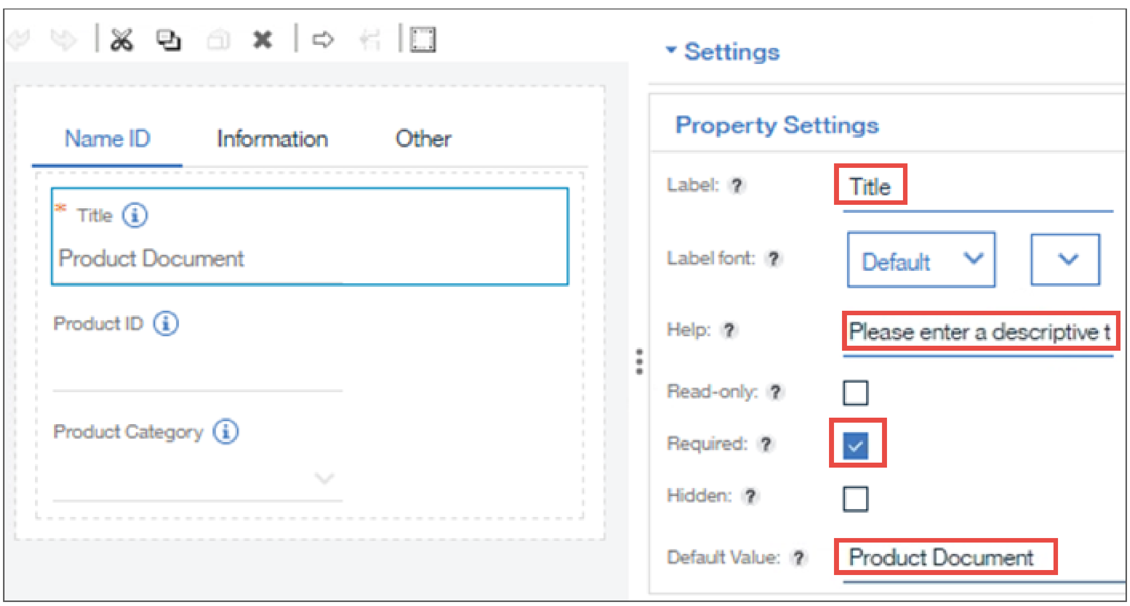
__ 4. Notice that the **Label** is changed on the canvas.

__ 5. In the **Help** field, type: `Enter a descriptive title`.

__ 6. Select **Required**.

__ 7. In the middle pane, notice that an orange star icon is shown for the property.

__ 8. For the **Default Value** field, enter the text: `Product Document`



__ 9. On the right, scroll down to the **Editor Settings** section.

__ 10. In the **Editor** list, select **Text Box**.

__ 11. For the **Hint** field, type `Keep the title short`.

__ 12. For **Hint position**, set **Outside**.

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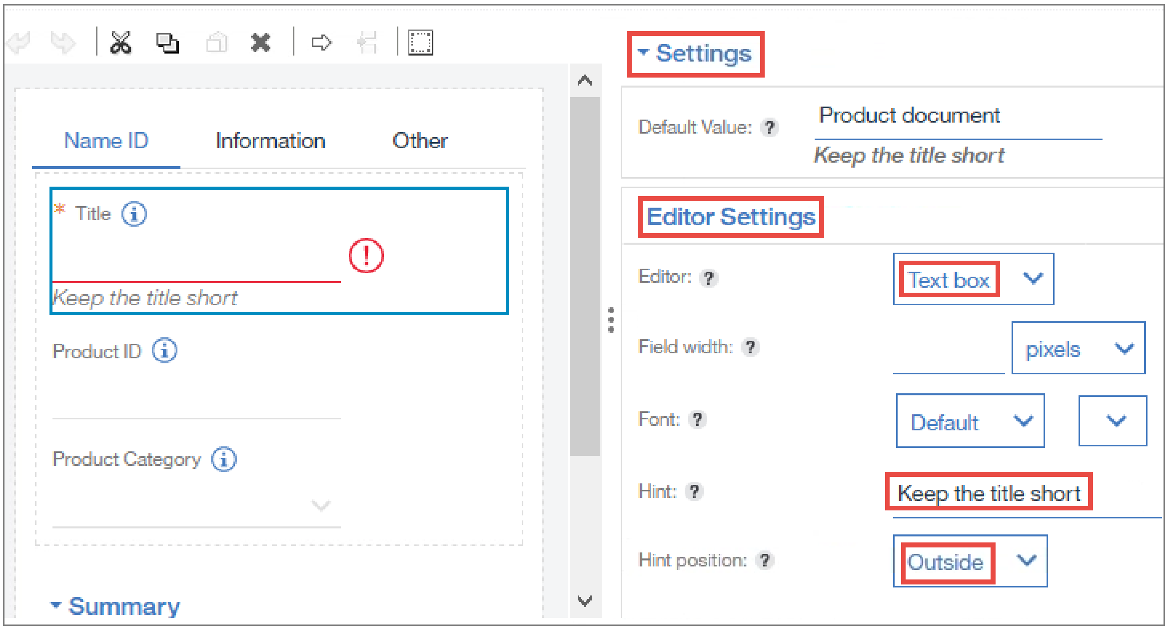


__ 13. Click **Save and Close** to save the layout changes.

4.5. Test the layout in the Test tab

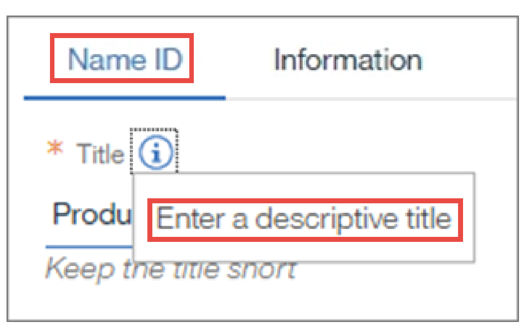
__ 1. On the **EDU Entry Template** tab, select **Set the Item Properties** and click **Edit Layout**.

__ 1. On the lower left pane, select the **Test** tab to preview the changes.

Hint

The **Name ID** and **Information** tabs with properties are shown. The **Other** tab is not shown because it does not have any properties.

__ 2. On the **Name ID** tab, for **Title,** hover over the **Information** icon and verify that the custom text for **Help** is shown: **Enter a descriptive title**



__ 3. For **Title**, notice that the default value: **Product Document** that you entered and verify the hint text: **Keep the title short**.

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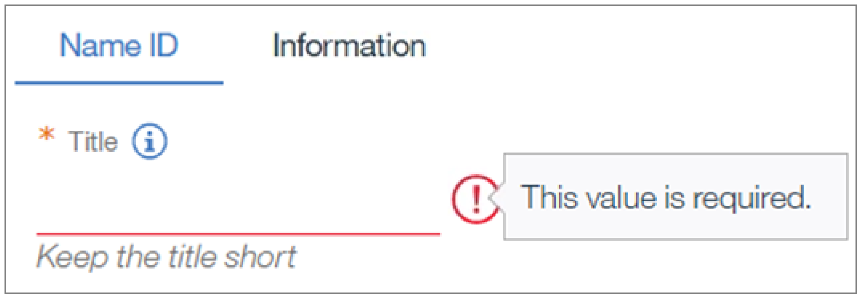
__ 4. Delete the text in the **Title** field, click outside the **Title** field and notice that a red symbol is shown.

__ 5. Click the red symbol, the message `This value is required` is shown since you configured this property as **Required**.



4.6. Add another layout

You can add more than one container (layout) to the canvas.

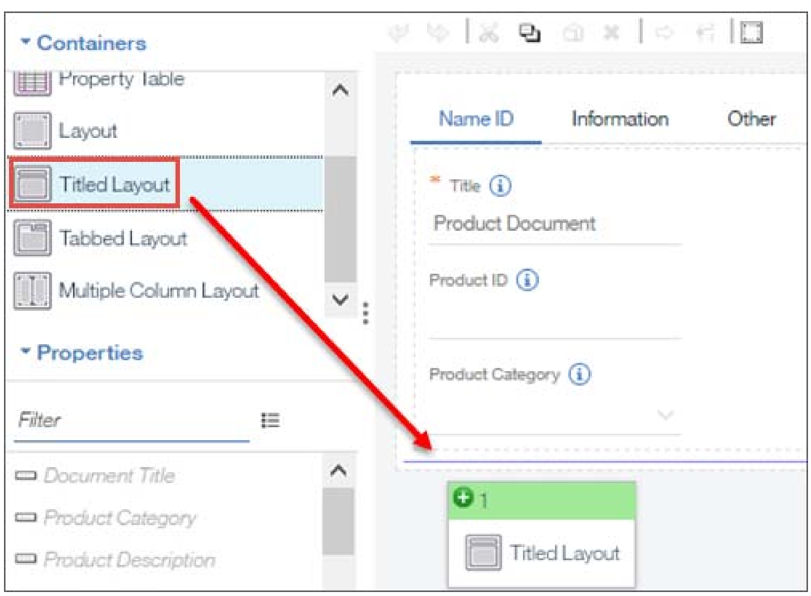
__ 1. On the lower left pane, click the **Design** tab.

__ 2. Select the **Name ID** tab.

__ 3. On the left pane, in the **Containers** list, select **Titled Layout**.

__ 4. Drag it to the space outside the tabbed layout.

When you drag the container to the canvas, a thin blue line appears.
The tab color changes from red to green when it is ready to release the control.



__ 5. On the right pane, in the **Layout Container Settings** > **Title** field, type `Summary`.

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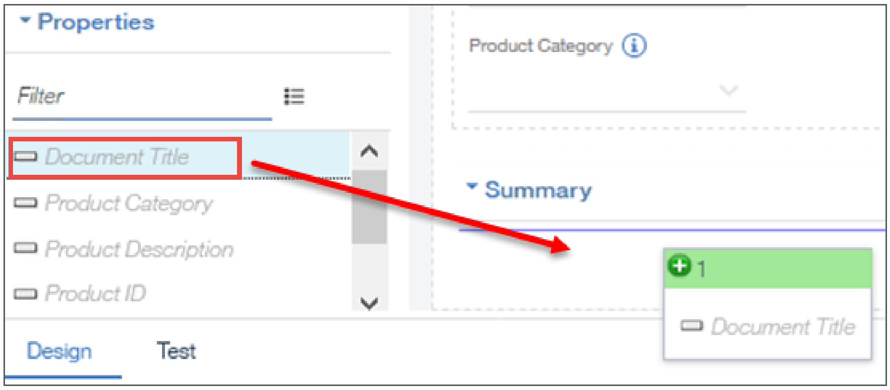
__ 6. From the **Properties** pane on the lower left, drag **Document Title** and add it to the **Summary** layout.



Hint

You can add the same property more than one time to your layouts, for example, on two different tabs or layouts.

__ 7. Check the layout in the **Test** tab.

__ a. On the lower left pane, click the **Test** tab to preview the changes you made.

__ b. Verify that in the **Name ID** tab, the **Summary** section is added.

__ 8. Click **Save and Close** twice to save your changes on the **Layout Editor** and to the entry template.

__ 9. Log out of the IBM Content Navigator desktop and close the browser and the changes are refreshed when you open the desktop.

4.7. Test the custom property layout

__ 1. Open the Firefox browser and log in to the IBM Content Navigator **Sample Desktop**.

- The **Sample Desktop** shortcut or URL:
  `http://ecmedu01:9081/navigator/?desktop=SampleDesktop`
- **User name**: `p8admin`
- **Password**: `FileNet1`

__ 2. Switch from the **Browse** view to the **Entry Template Manager** view.

__ 3. On the **Entry Templates Manager** view, click the **EDU Entry Template** link.

The **Add Document by Using Entry Template** page opens.

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Hint

On the **Browse** view, you can also open the **EDU Docs** folder and add a document to that folder. Your entry template is automatically applied. You associated the folder in Section 3, "Associate entry templates with a folder," on page 4-12.

__ 4. Verify that the properties section shows the layout that you configured.

__ 5. Add a document with the data in the following table.

Item	**Value**
What do you want to save	**Local Document**
Browse to folder	`C:\Training\WF270G\SampleDocs`
Document Name	**MarketingPlan1.pdf**
Title	`Custom Layout Test`
Product ID	`BBM234`
Product Category	**Deluxe**
Product Description	`Recent product`
Product Price	`150.25`
Product Quantity	`5`

Note

For this step, you can use any values, but they have to match the data type of the property. Click the information icon that is next to the property to check its data type.

- To enter the property values, use both the **Name ID** and **Information** tabs.
- Select a PDF or image file so that you can view the document in the Viewer.

__ 6. For the **Title** field, when you enter a value, notice that the **Document Title** field on the **Summary** node is automatically populated.

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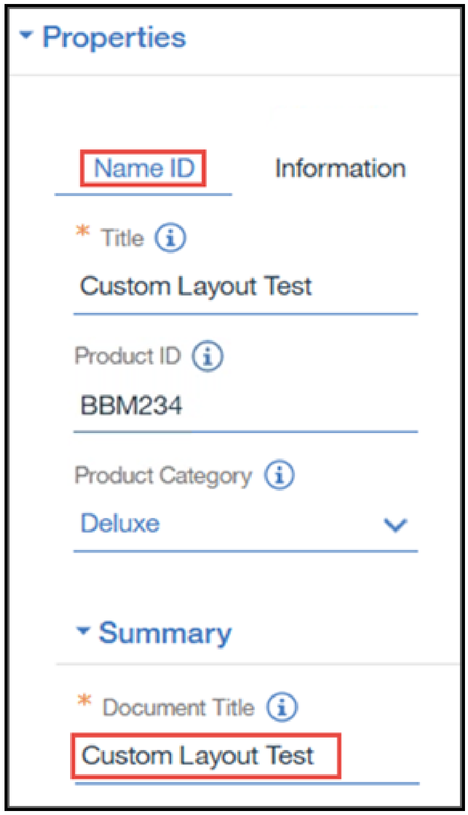

Information

The custom property layout is shown in the following sections:

- Add Document or Check in page
- You already tested the Add Document page.
- **Properties** pane on the Browse page
- **Properties** page
- **Properties** pane in IBM Content Navigator **Viewer**

__ 7. Check the **Properties** pane.

__ a. In **Browse** > **EDU Docs** folder, single-click the **Custom Layout Test** document.

__ b. On the right pane, in the **Properties** section, verify that the layout is shown.

__ 8. Check the **Properties** page.

__ a. Right-click the **Custom Layout Test** document and then select **Properties** from the list.

__ b. On the **Properties** page, verify that the layout is shown.

__ c. Click **Cancel** to close the page.

__ 9. Verify the **Properties** pane in IBM Content Navigator **Viewer**.

__ a. Double-click the **Custom Layout Test** document to open it in the viewer.

__ b. In the viewer, select **View Properties** icon and verify the layout.

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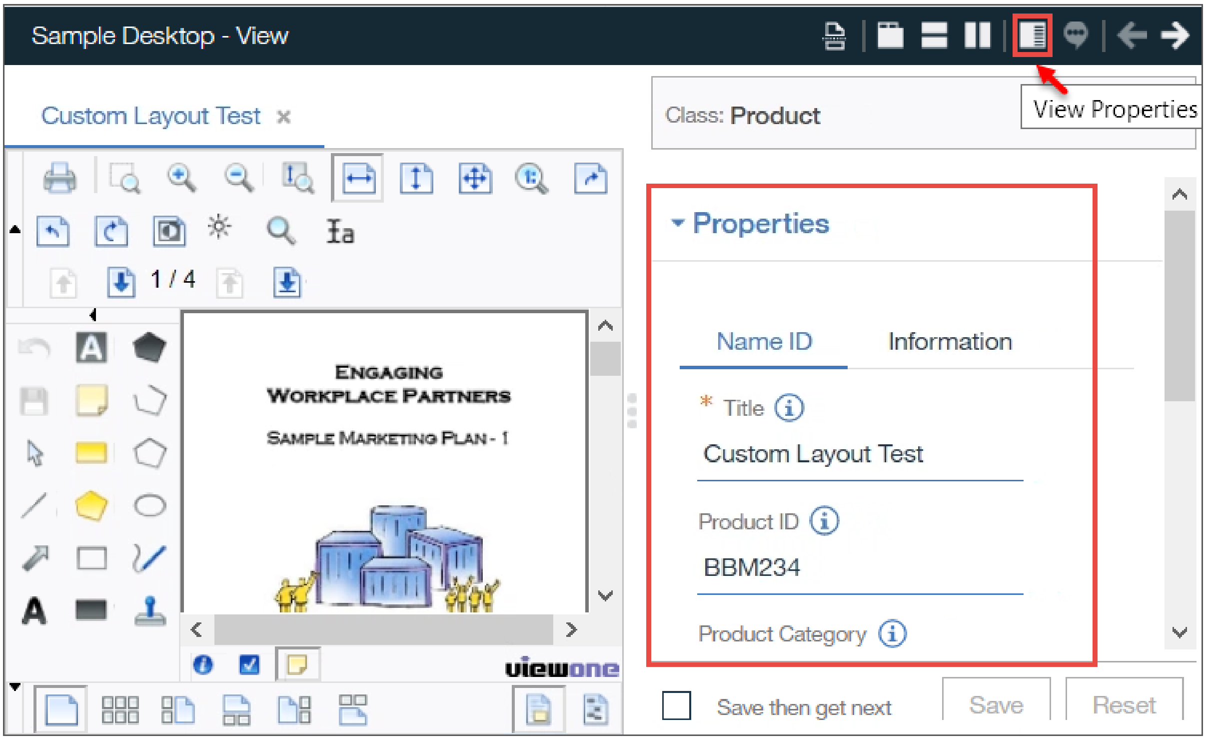

__ 10. Close the Viewer.

__ 11. Log out of IBM Content Navigator and close the browser.

End of exercise

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Exercise review and wrap-up

This exercise showed how to configure entry template management, build entry templates, and customize property layouts.

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Exercise 5. Configuring and working with role-based redactions

Estimated time

01:30

Overview

In this exercise, you learn how to configure role-based redactions and implement it for the documents.

Objectives

After completing this exercise, you should be able to:

- Enable role-based redactions for a repository
- Configure redaction reasons, roles, and policies
- Work with role-based redaction annotations

Introduction

In this exercise, you configure role-based redactions for a FileNet Content Manager repository in the IBM Content Navigator administration tool. You test your configuration by creating and editing the role-based redactions.

This exercise includes the following sections:

Section 1, "Enable role-based redactions for a repository," on page 5-2

Section 2, "Configure redaction reasons, roles, and policies," on page 5-6

Section 3, "Work with role-based redactions," on page 5-12

Requirements

The activities in this unit assume that you have access to the student system that is configured for these activities and all components are running when you begin an exercise.

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Section 1. Enable role-based redactions for a repository

In this section, you configure role-based redactions for a FileNet Content Manager repository.

1.1. Verify the viewer mapping

For role-based redactions, the Daeja ViewONE Virtual Viewer must be the default viewer for the PDF and TIFF file types. In this section, you verify the viewer mapping for the PDF and TIFF file types.

Important

Before you begin the exercise, ensure that the components are running. If you did not start the components already, refer to Section 1, "Prepare your system: Start the components," on page 1-3 to start them.

__ 1. Start the IBM Content Navigator administration tool.

__ a. Open the Firefox browser and click the **ICN Admin** shortcut. Or go to the **URL**: `http://ecmedu01:9081/navigator/?desktop=admin`

__ b. Enter the following values:

- **User name**: `p8admin`
- **Password**: `FileNet1`

__ c. Click **Log in**.

__ 2. On the left pane, click **Viewer Maps**.

__ 3. On the **Viewer Maps** tab, select **Default viewer map** and click **Edit**.

The default viewer map is associated with the **Sample Desktop** that is used for role-based redactions.

__ 4. Verify the mappings for the **FileNet Content Manager** repository.

__ a. On the **Default viewer map** tab, scroll down to the **Mapping** section.

__ b. In the **Repository type contains** search field, type `FileNet` to filter the list.

All the mappings for **FileNet Content Manager** are shown in the list.

__ c. Verify that the **Daeja ViewONE Virtual** Viewer row includes the **application/pdf** and **image/tiff** file types. This mapping is a requirement for role-based redactions.

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Hint

Recall Section 6, "Create a viewer map for PDF files," on page 3-23 where you changed the default viewer for the PDF files for the Custom Desktop.

__ 5. Close the **Default viewer map** and **Viewer Maps** tabs.

1.2. Enable role-based redactions for a repository and assign roles

__ 1. On the left pane, click **Repositories**.

__ 2. On the **Repositories** tab, select **Sales** and click **Edit**.

__ 3. On the **Sales** > **General** subtab, scroll down and click **Connect**.

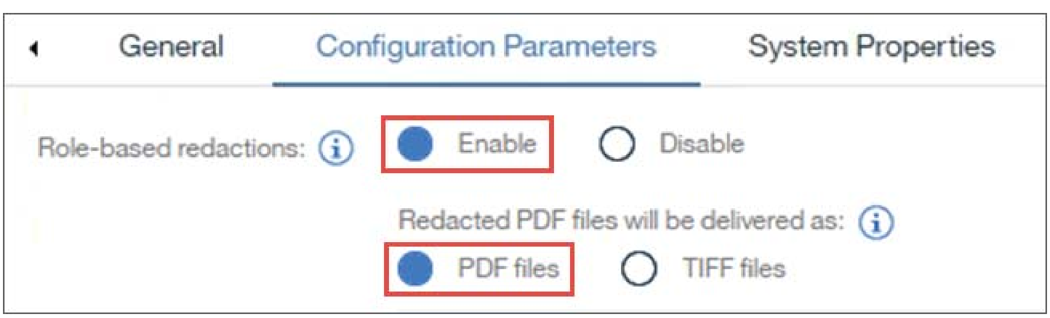
__ 4. When prompted, log in to the repository with the following values:

- **User ID**: `p8admin`
- **Password**: `FileNet1`

__ 5. Click the **Configuration Parameters** subtab, scroll down to the **Optional Features** section, and expand the section.

__ 6. For **Role-based redactions**, select **Enable**.

__ 7. For **Redacted PDF files will be delivered as**, verify the default value: **PDF files**.



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__ 8. For the **Role-based redactions** section, verify that the following users and groups are already assigned:

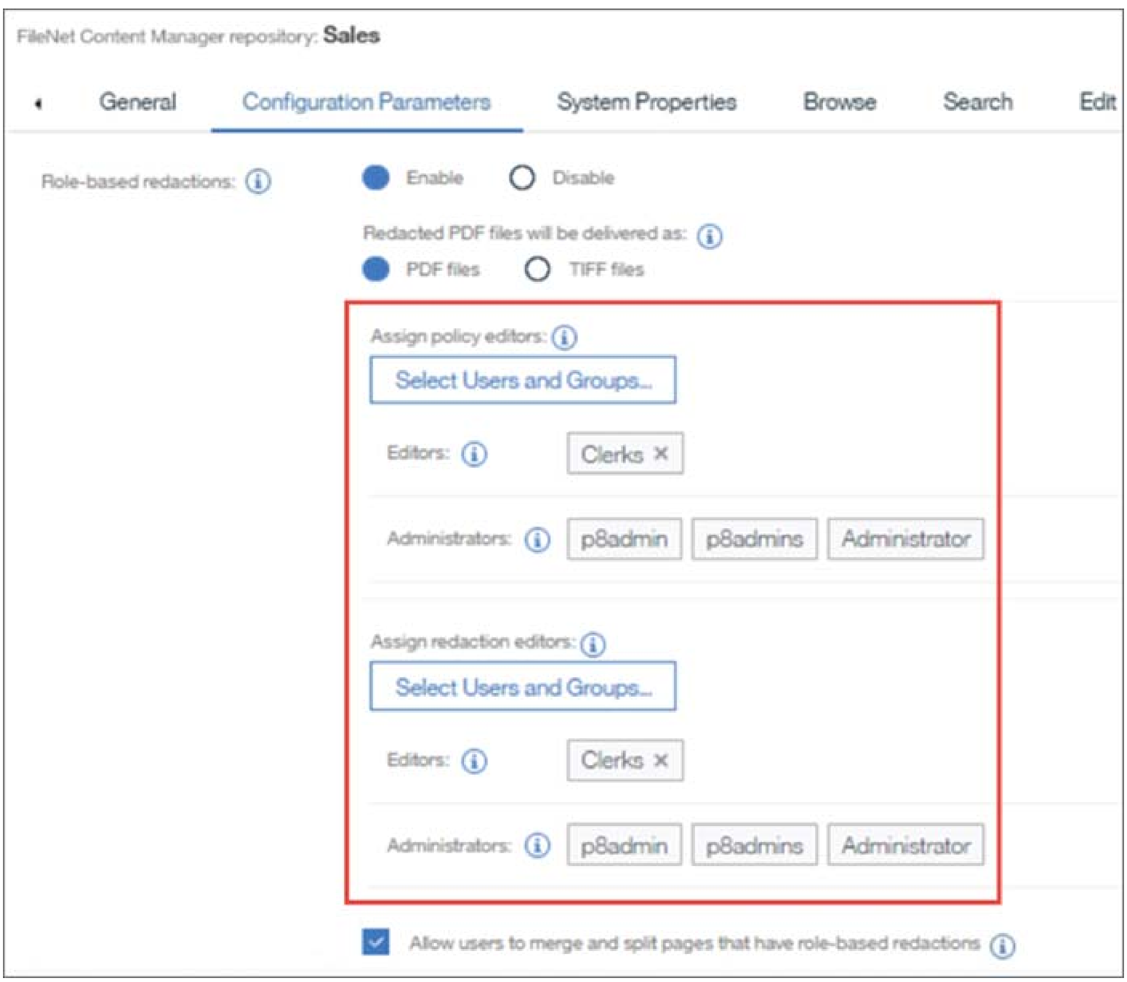
- **Assign policy editors:**
  The users under this section can create, modify, and delete the redaction policies and roles.
  - **Editors**: Clerks
  - **Administrators**: p8admin, p8admins, and Administrator
- **Assign redaction editors:**
  The users under this section can create, modify, and delete the role-based redactions.
  - **Administrators**: p8admin, p8admins, and Administrator

__ 9. Add users and groups as redaction editors.

__ a. For **Assign redaction editors,** click **Select Users and Groups**.

__ b. On the **Add Users and Groups** page, search for the **Clerks** group, add it to the **Selected** pane, and click **Add**.

__ c. On the **Assign policy editors** section, verify that the **Clerks** group is added to the list.



__ 10. Leave the **Allow the users to merge and split pages that have the role-based redactions** option selected.

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__ 11. Click **Save and Close** to save the changes to the repository.

__ 12. Close the **Repositories** tab.

__ 13. Leave IBM Content Navigator open for the next section.

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Section 2. Configure redaction reasons, roles, and policies

In this section, you configure redaction reasons, roles, and policies for a repository. The policy editors that you configured in the previous section have access to create, edit, and delete the redaction policies.

2.1. Create a redaction reason

The redaction reasons indicate why sensitive data is protected by obscuring it from view. Each reason identifies a type of sensitive data that is concealed from general users.

__ 1. If the IBM Content Navigator administration tool is not already open, log in to the desktop.

- The **ICN Admin** shortcut or go to the URL: `http://ecmedu01:9081/navigator/?desktop=admin`
- **User name**: `p8admin`
- **Password**: `FileNet1`

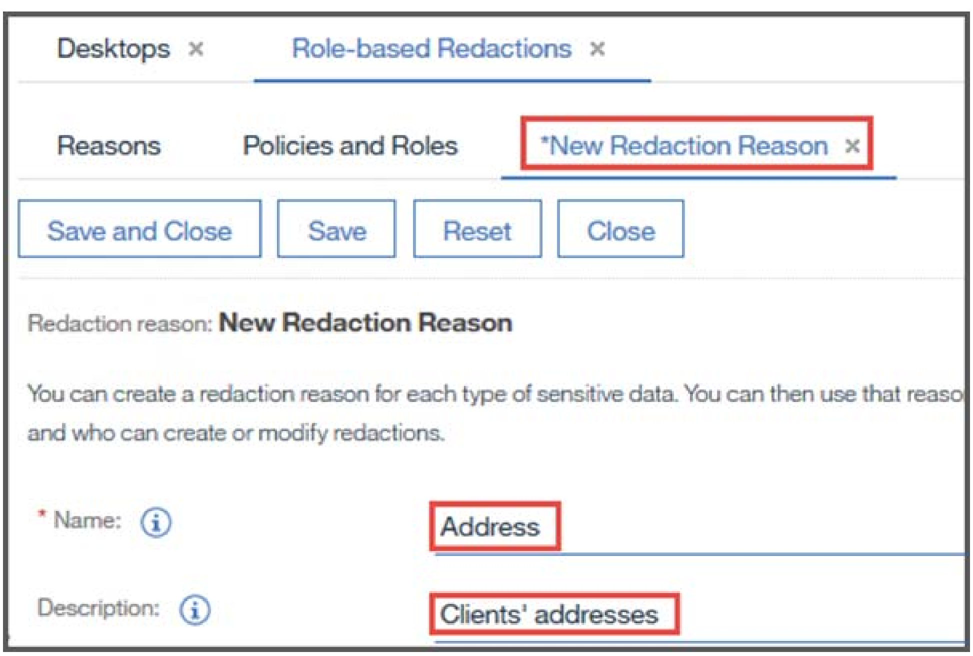
__ 2. On the left pane, click **Role-based Redactions**.

__ a. On the **Role-based Redactions** > **Reasons** subtab, notice two default redaction reasons listed: **Credit Card Number** and **Social Security Number**

__ b. Click **New Redaction Reason**.

__ 3. On the **New Redaction Reason** tab, for **Name**, type: `Address`

__ 4. For **Description**, type: `Clients' addresses`



__ 5. Click **Save and Close**.

__ 6. On the **Role-based Redactions** tab, verify that the new reason is listed.

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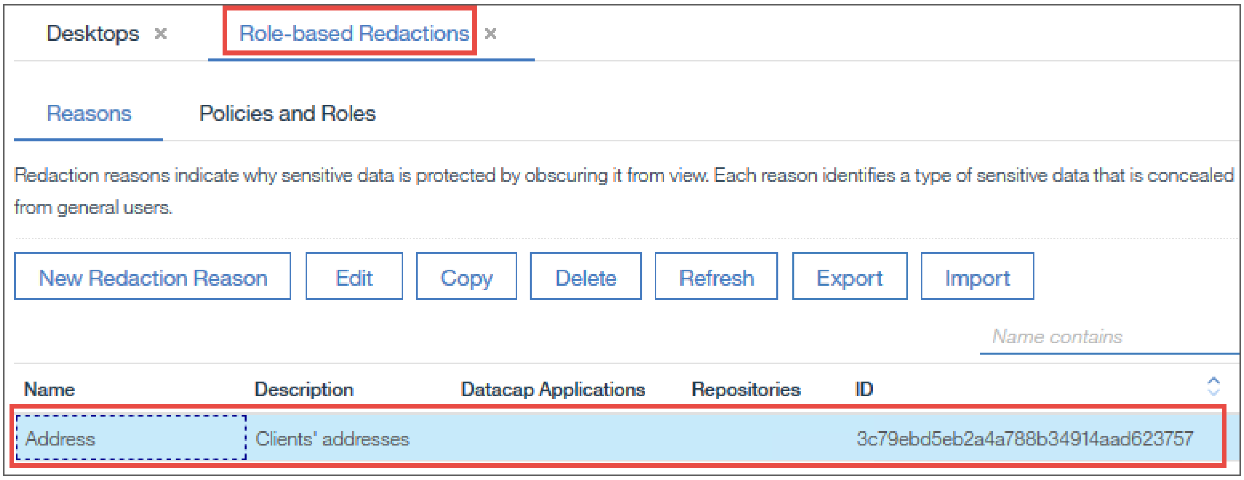


__ 7. Leave IBM Content Navigator open for the next section.

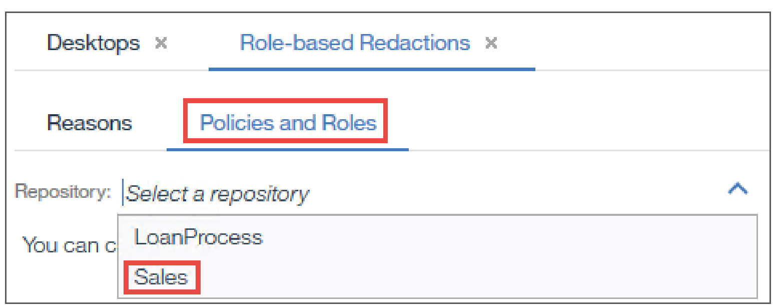
2.2. Configure redaction roles for editors

You can provide access to specific users and groups to read sensitive data and edit annotations that protect the sensitive data from view.

__ 1. On the **Role-based Redactions** tab, select the **Policies and Roles** subtab.

__ a. For the **Repository** list, select **Sales**.

When you configure multiple repositories for role-based redactions in your environment, those repositories are listed.



__ b. If you are prompted, log in with the user name: `p8admin` and password: `FileNet1`

__ 2. Scroll down to the **Redaction Roles Configuration** section and click **New Redaction Role.**

__ a. On the **New Redaction Role** subtab, for **Name**, type: `Credit Card approvers`

__ b. Leave **Type** as **Editor**.

__ c. For **Description**, type: `Allow clerks to edit redactions`

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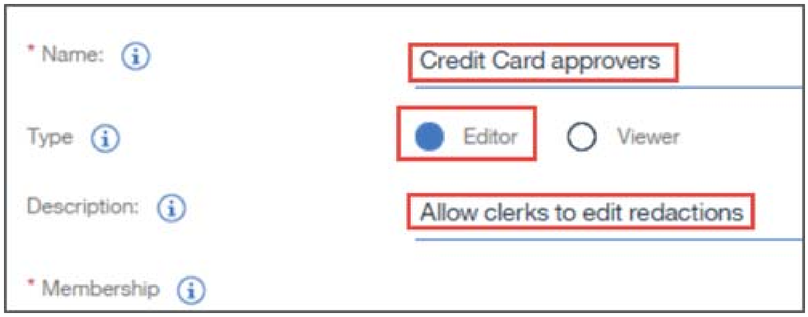


__ 3. For the **Membership** field, move the following users and groups to **Selected Redaction Editors:**

- **Clerks**
- **Administrator**
- **p8admin**
- **p8admins**

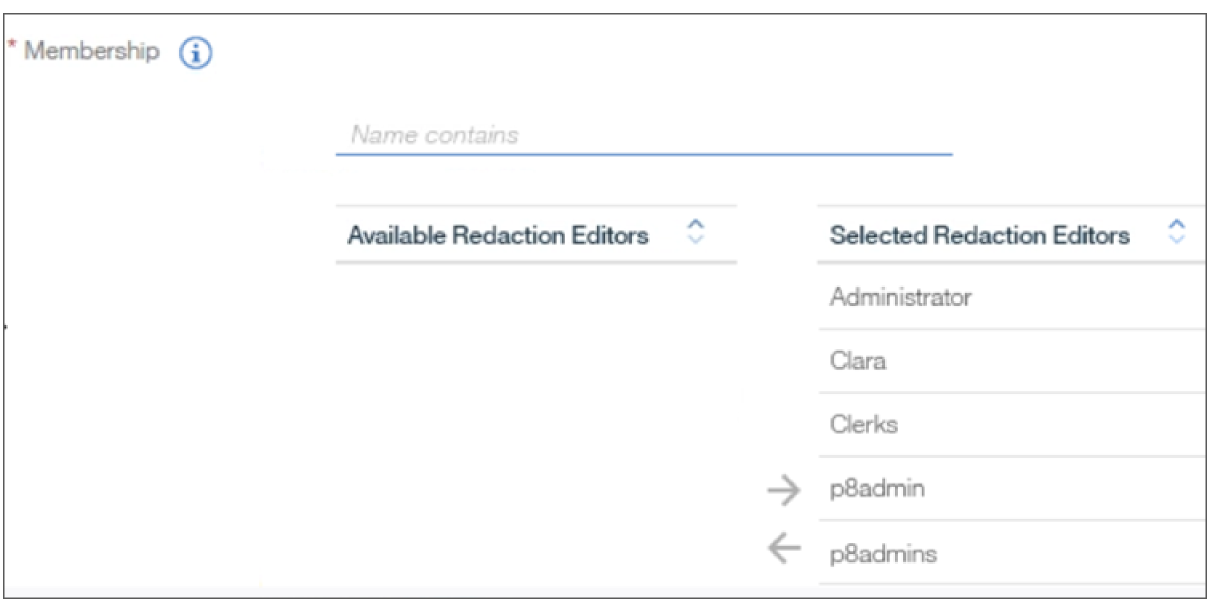
Note

You can edit **Default access**: **Allow** or **Deny** at the end of the page.You defined the groups in the previous section when you enabled the repository for role-based redaction. You can add more editors from this page without switching to the repository configuration page.

__ 4. Click **New Editors.**

__ 5. On the **Add Users and Groups** page, search for the **Clara** user, move the user to the **Selected** pane, and click **Add**.

__ d. On the **New Redaction Role** subtab, verify that the **Clara** is added to the list.



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__ 6. Click **Save and Close** to save your changes.

__ 7. In the **Redaction Roles Configuration** section, verify that **Credit Card approvers (Editor)** role is listed.

2.3. Configure redaction roles for viewers

In this section, you repeat the steps from the previous section to add the viewers role.

__ 1. In the **Redaction Roles Configuration** section, create a redaction role.

__ a. Click **New Redaction Role.**

__ b. On the **New Redaction Role** subtab, for **Name**, type: `CC Viewers` and for **Type**, select **Viewer**.

__ c. For **Description**, type: `Allow managers to view redactions`

__ 2. In the **Membership** field, configure CC Viewers.

__ a. Select **Editors**.

You choose **Editors** to activate the **New Editors** button to add new users and groups. But because you chose **Viewer** in the previous step, the group is added for **Viewers**.

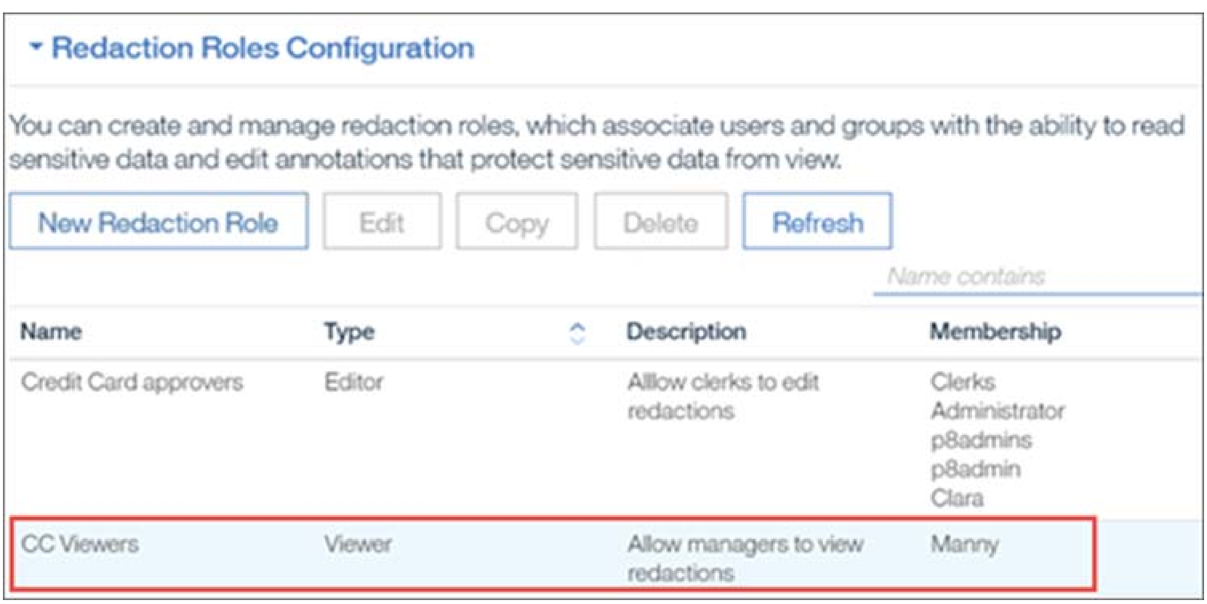
__ b. Scroll down to **New Editors** and click it.

__ c. On the **Add Users and Groups** page, search for the **Manny** user, move the user to the **Selected** pane, and click **Add**.

__ d. On the **New Redaction Role** subtab, in the **Selected Users and Groups** list, verify that **Manny** is added.

__ 3. Click **Save and Close** to save your changes.

__ 4. On the **Policies and Roles** > **Redaction Roles Configuration** section, verify that the new **Viewer** role, along with the previous Editor role, is listed.



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__ 5. Leave the **Role-based Redactions** tab open for the next section.

2.4. Configure a redaction policy

A policy ties the roles and redaction reasons together.

__ 1. On the **Policies and Roles** subtab, scroll up to **Redaction Policies Configuration**.

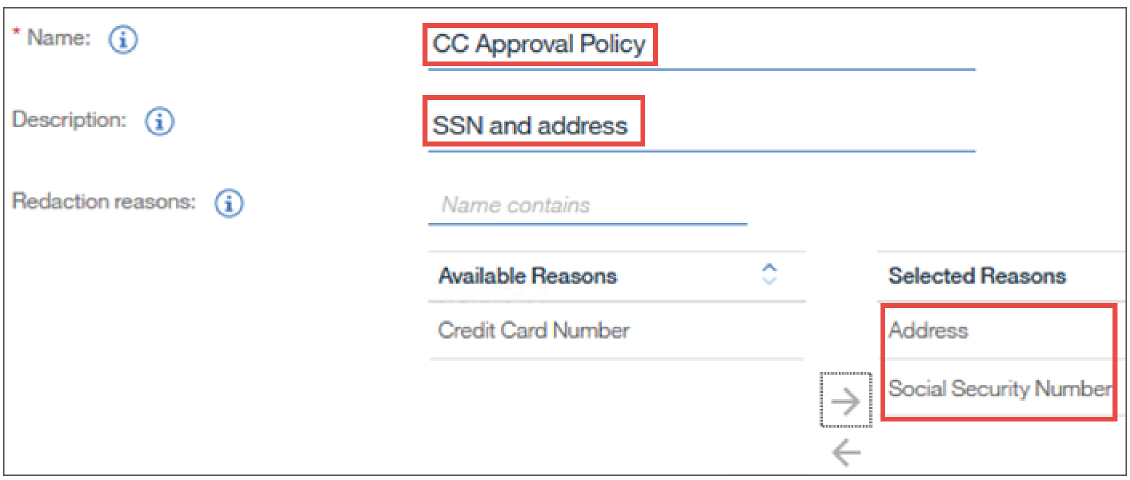
__ 2. Create a redaction policy.

  __ a. Click **New Redaction Policy**.

  __ b. For **Name**, type: `CC Approval Policy`

  __ c. For **Description**, type: `SSN and address`

  __ d. For **Redaction reasons**, select **Social Security Number** and **Address** from **Available Reasons** and move to the **Selected Reasons** pane.



Notice that you can create a **New Reason** on this page without switching to the **Reasons** subtab.

__ 3. Scroll down to **Redaction editors**, select **Credit Card approvers** and move it to the **Selected Editor Roles** pane.

__ 4. In **Redaction viewers**, move **CC Viewers** from to the **Selected Viewers Roles** pane.

__ 5. Click **Save and Close** to save the changes.

__ 6. On the **Policies and Roles** > **Redaction Policy Configuration** section, verify that the new policy is listed and the reasons, editors, and viewers are shown.

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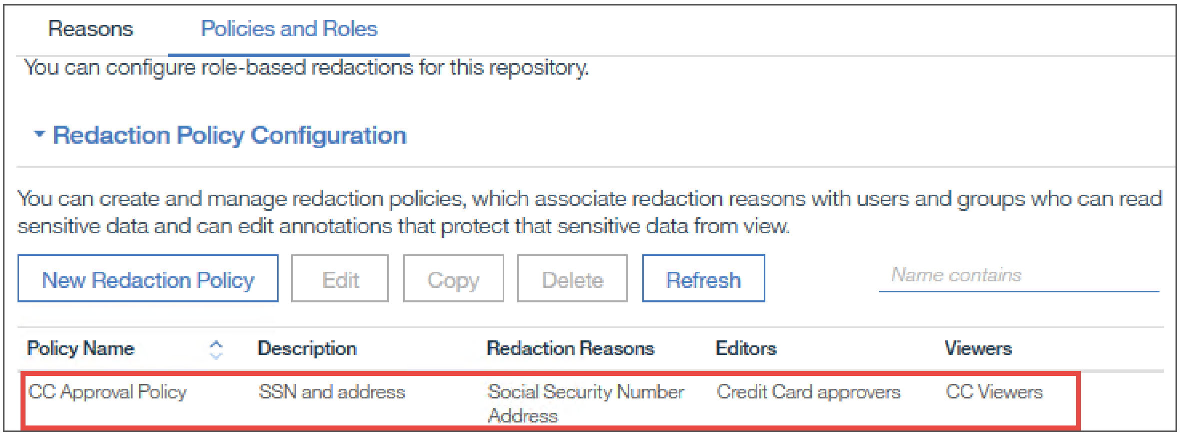

__ 7. Log out of IBM Content Navigator and close the browser.

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Section 3. Work with role-based redactions

3.1. Open a PDF or TIFF document in the viewer

__ 1. Open the Firefox browser and log in to the IBM Content Navigator **Sample Desktop** as a redaction editor: p8admin

- The **Sample Desktop** shortcut or **URL**: `http://ecmedu01:9081/navigator/?desktop=SampleDesktop`
- **User name**: `p8admin`
- **Password**: `FileNet1`

__ 2. In the left pane, click the **Role-based Redactions** folder.

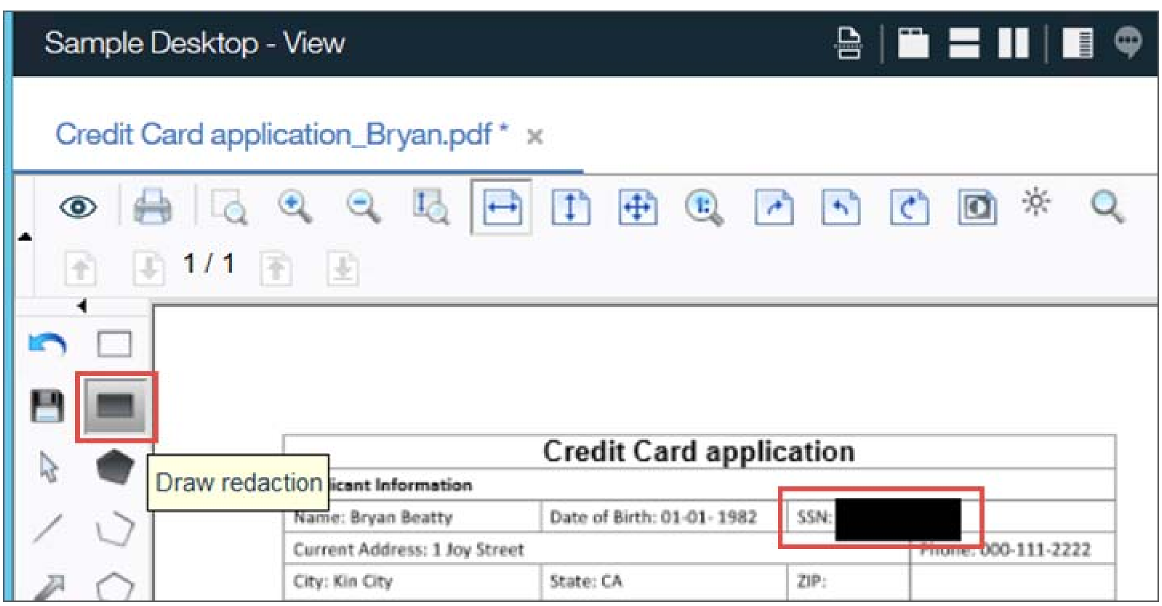
__ 3. Right-click **Credit Card application_Bryan.pdf** and select **Open** from the list

You can also double-click the document.

3.2. Assign a redaction reason to an annotation

__ 1. On the viewer, in the left toolbar, click the **Draw redaction** icon.

__ 2. Draw a redaction annotation around the value for the **SSN** field.



__ 3. Assign a redaction reason to the annotation.

__ a. Right-click the redaction annotation that you created on the **SSN** field, click **Edit redaction reason** from the toolbar.

__ b. In the **Select redaction reason** dialog box, select **Social Security Number** from the list and click **OK**.

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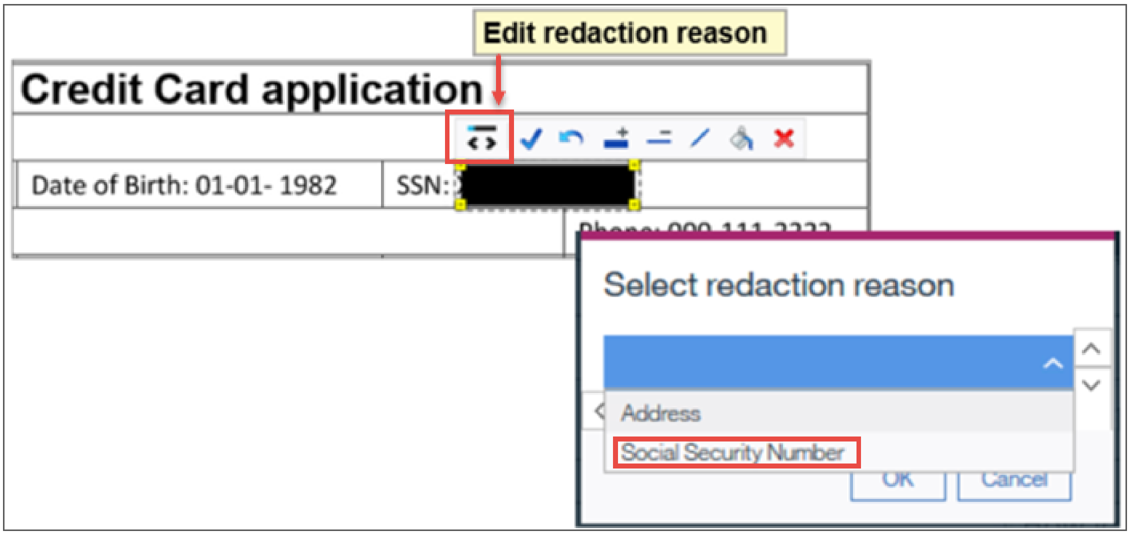


Note

When you assign a redaction reason to a redaction annotation, it is converted into a role-based redaction annotation.

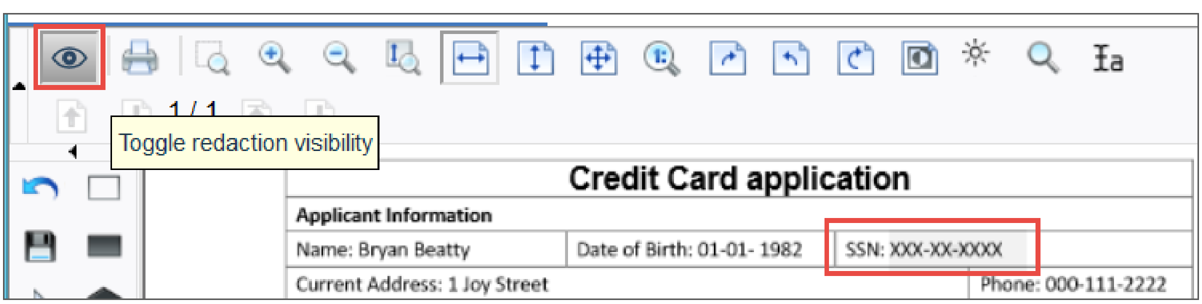
With editor permissions, you can toggle to the transparency mode to see the data through the redactions.

__ 4. View the redacted content:

__ a. Click the **Toggle redaction visibility** (eye) icon.

__ b. Verify that you are able to view the redacted content.

The redacted area is not hidden and has a gray background.



__ c. Click the **Toggle redaction visibility** icon again to make the content hidden.

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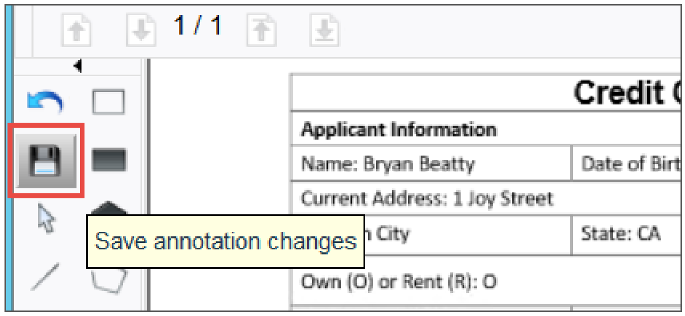
__ 5. Click the **Save annotation changes** icon on the left toolbar.



__ 6. Close the viewer.

__ 7. On the **Browse** view, verify that you, as a redaction editor: p8admin, can view the content in the thumbnail view on the right pane.

The data is not hidden for editors.

__ 8. Log out of IBM Content Navigator and close the browser.

3.3. Access the redactions as a user without permissions

In this section, you, as Misty who does not have an editor or viewer role for role-based redactions, check the access to the redacted content.

__ 1. In the Firefox browser, log in to the IBM Content Navigator **Sample Desktop** as **Misty**.

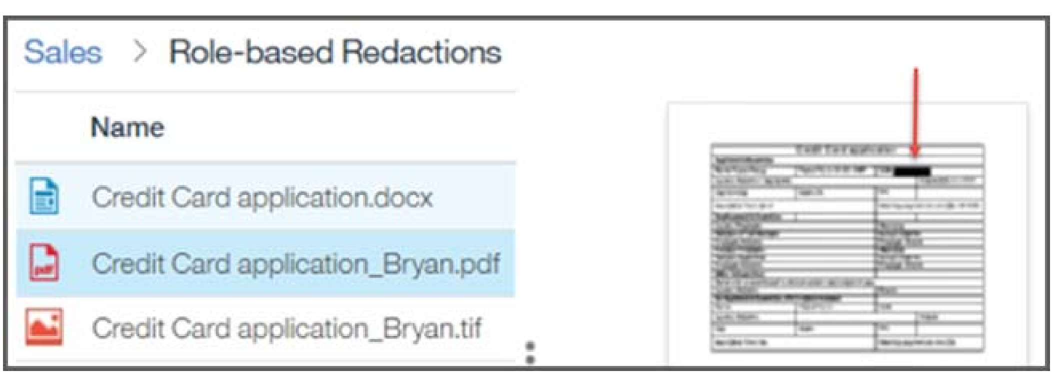
- The **Sample Desktop** shortcut or **URL**: `http://ecmedu01:9081/navigator/?desktop=SampleDesktop`
- **User name**: `Misty`
- **Password**: `FileNet1`

__ 2. View the thumbnail for the redacted document.

__ a. On the **Browse** view, from the left pane, click the **Role-based Redactions** folder.

__ b. Select **Credit Card application_Bryan.pdf** that p8admin redacted earlier.

__ c. Verify that **Misty** cannot view the redacted content in the thumbnail view on the right pane. The data is hidden.



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__ 3. Double-click the **Credit Card application_Bryan.pdf** document to open it in the viewer.

__ 4. On the viewer, verify that Misty does not have access to the role-based redactions:

__ a. Verify that you can not view **Toggle redaction visibility** (eye) icon and the redacted (hidden) content for the SSN field.

__ b. Right-click redaction annotation on the **SSN** field and verify that the toolbar does not show the **Edit redaction reason** icon.

You cannot edit the redaction reasons.

__ 5. Verify that Misty cannot edit the Sensitive Content field.

__ a. In the viewer, click the **View Properties** icon from the banner toolbar.

The properties for the document are shown on the right-pane of the viewer.

__ b. Under the **Properties** section, verify that the **Sensitive Content** field is not shown and then close the viewer.

__ 6. Verify that Misty can not see the redacted content in the downloaded document.

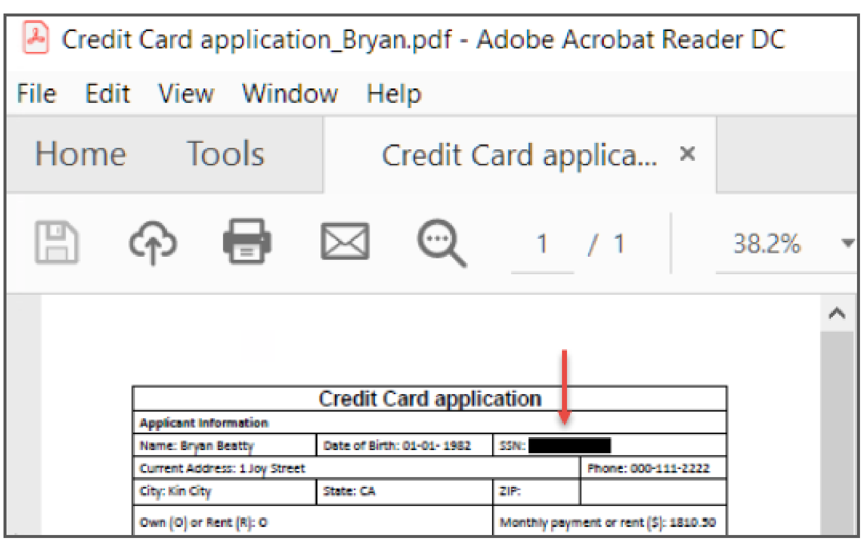
__ a. On the **Browse** view, right-click **Credit Card application_Bryan.pdf** and select **Download > As Original** from the list.

__ b. On the dialog box, select the **Save File** option and then click **OK**.

By default, the document is downloaded to the **Downloads** folder.

__ c. In **Windows Explorer**, browse to the **Downloads** folder, double-click the **Credit Card application_Bryan.pdf** document to open.

The document is opened in Adobe Acrobat Reader DC.



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__ d. Verify that Misty cannot view the redacted content in the document and the data is hidden.

__ 7. Close the file and log out of IBM Content Navigator and close the browser.

3.4. Work with the redactions as an editor

You, as editor:p8admin, created role-based redaction in the previous section. You can view and edit the redactions as another editor, Clara, who is a member of the Clerks group and has permissions to edit the role-based redactions.

__ 1. Open the **Firefox** browser and log in to the IBM Content Navigator **Sample Desktop** as **Clara**.

- The **Sample Desktop** shortcut or **URL**: `http://ecmedu01:9081/navigator/?desktop=SampleDesktop`
- **User name**: `Clara`
- **Password**: `FileNet1`

__ 2. View the thumbnail for the redacted document.

__ a. On the **Browse** view, in the left pane, click the **Role-based Redactions** folder.

__ b. Single-click **Credit Card application_Bryan.pdf**.

__ c. On the right pane, in the thumbnail view, verify that **Clara** can view the content.

The data is not hidden for the redaction editors who have access to that redaction.

__ 3. Double-click **Credit Card application_Bryan.pdf** to open it in the viewer.

__ 4. Verify that you can view the redacted content.

__ a. On the viewer, click the **Toggle redaction visibility** icon.

__ b. Verify that you are able to view the redacted hidden content for the **SSN** field.

__ c. Click the **Toggle redaction visibility** icon again to make the content hidden.

__ 5. Verify that you can edit the role-based redaction and redaction reason.

__ a. Right-click the redaction annotation on the **SSN** field and verify that you can access the redaction toolbar and you can edit the redaction.

__ b. Click the **Edit redaction reason** icon from the toolbar and verify that the **Select redaction reason** dialog box opens and you can select a redaction reason from the list.

__ c. Click **Cancel** on the dialog box.

__ 6. Update the Sensitive Content property for the document.

__ a. In the viewer, click the **View Properties** icon from the banner toolbar.

The properties for the document are shown on the right-pane of the viewer.

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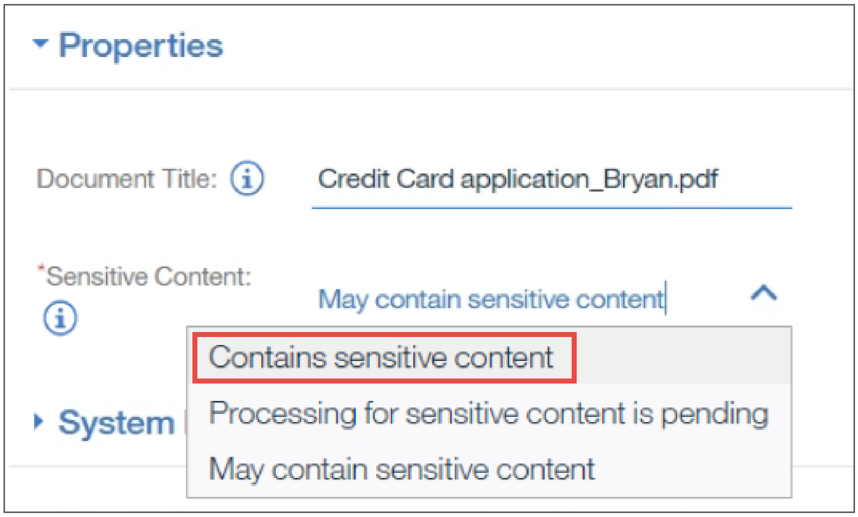
__ b. For the **Sensitive Content** list, select **Contain sensitive content**.



__ c. Click **Save** in the lower right of the page and close the viewer.

3.5. Access the redactions as a viewer

You, as Clara who is an editor for role-based redactions, were able to view and edit the role-based redaction that p8admin created. In this section, you, as Manny who is a viewer for role-based redactions, check the role-based redaction access. Manny has a limited access to the redacted information.

__ 1. Open the Firefox browser and log in to the IBM Content Navigator **Sample Desktop** as **Manny**.

- The **Sample Desktop** shortcut or URL: `http://ecmedu01:9081/navigator/?desktop=SampleDesktop`
- User name: `Manny`
- Password: `FileNet1`

__ 2. View the thumbnail for the redacted document.

__ a. On the **Browse** view, in the left pane, click the **Role-based Redactions** folder.

__ b. Single-click **Credit Card application_Bryan.pdf**.

__ c. Verify that a redaction viewer: **Manny** can view the content in the thumbnail view on the right pane.

The data is not hidden.

__ 3. Double-click **Credit Card application_Bryan.pdf** to open it in the viewer.

__ 4. On the viewer, verify the following level of access for Manny as a viewer of role-based redactions.

__ a. You are able to view the redacted hidden content for the SSN field.

__ b. You cannot access the **Toggle redaction visibility** icon.

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__ c. When you right-click the redaction annotation on the **SSN** field and open the toolbar, it does not show the **Edit redaction reason** icon.

You cannot edit the redaction reasons.

__ 5. Verify that **Manny**, as a viewer, cannot edit the **Sensitive Content** field.

__ a. In the Viewer toolbar, click the **View Properties** icon.

__ b. In the **Properties** section, the **Sensitive Content** field is not shown.

__ 6. Close the viewer.

__ 7. Log out of IBM Content Navigator and close the browser.

End of exercise

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Exercise 6. Configuring and using IBM Navigator Sync

Estimated time

01:30

Overview

In this exercise, you learn how to configure IBM Navigator Sync and sync content across multiple devices.

Objectives

After completing this exercise, you should be able to:

- Configure IBM Navigator Sync
- Sync content across multiple devices
- Resolve sync conflicts

Introduction

As an IBM Content Navigator user, you want the capability to work on your documents on your mobile devices or desktop offline. You want to periodically sync your local copy to the repository. Your team uses an IBM Content Navigator teamspace to organize your work. You want offline access to the documents that are in your teamspace. You use the IBM Navigator Sync feature to achieve these goals.

In this exercise, you configure the sync services for the IBM Content Navigator desktops, repositories, and repository folders. You also configure the sync client for a local system. You use the IBM Navigator Sync feature to sync the content across multiple devices.

This exercise includes the following sections:

Requirements

The activities in this exercise assume that you have access to the student system that is configured for these activities and all components are running when you begin an exercise.

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Section 1. Configure the sync services

In this section, you configure the sync services for repositories and desktops.

1.1. Configure the sync server

In this section, you view the initial configuration for the sync services and edit it.

Important

Before you begin the exercise, ensure that the components are running. If you did not start the components already, refer to Section 1, "Prepare your system: Start the components," on page 1-3 to start them.

__ 1. Start the IBM Content Navigator administration tool.

__ a. Open the Firefox browser and click the **ICN Admin** shortcut. Or go to the **URL**: `http://ecmedu01:9081/navigator/?desktop=admin`

__ b. Enter the following values:

- **User name**: `p8admin`
- **Password**: `FileNet1`

__ c. Click **Log in**.

__ 2. On the left pane, click **Sync Services**.

__ 3. On the **Sync Services** tab, verify the following settings.

The **Sync services public URL** field: `http://ecmedu01:9081/sync/notify`

Information

On your student system, for the sync services, the server name is: **ecmedu01** and the port number: **9081**

The repositories communicate with the sync services by using this URL. All the repositories in the same environment share the sync service configuration.

__ 4. Configure the **Sync client settings** field.

__ a. Verify that the **Folder levels to sync** option is selected.

Available values for the field are: **All Subfolders**, **No subfolders**, or **Limited levels**

__ b. Set **Limited levels** and **2** folders.

This setting syncs one folder and one subfolder.

__ c. Verify that the **Sync schedule** option is selected.

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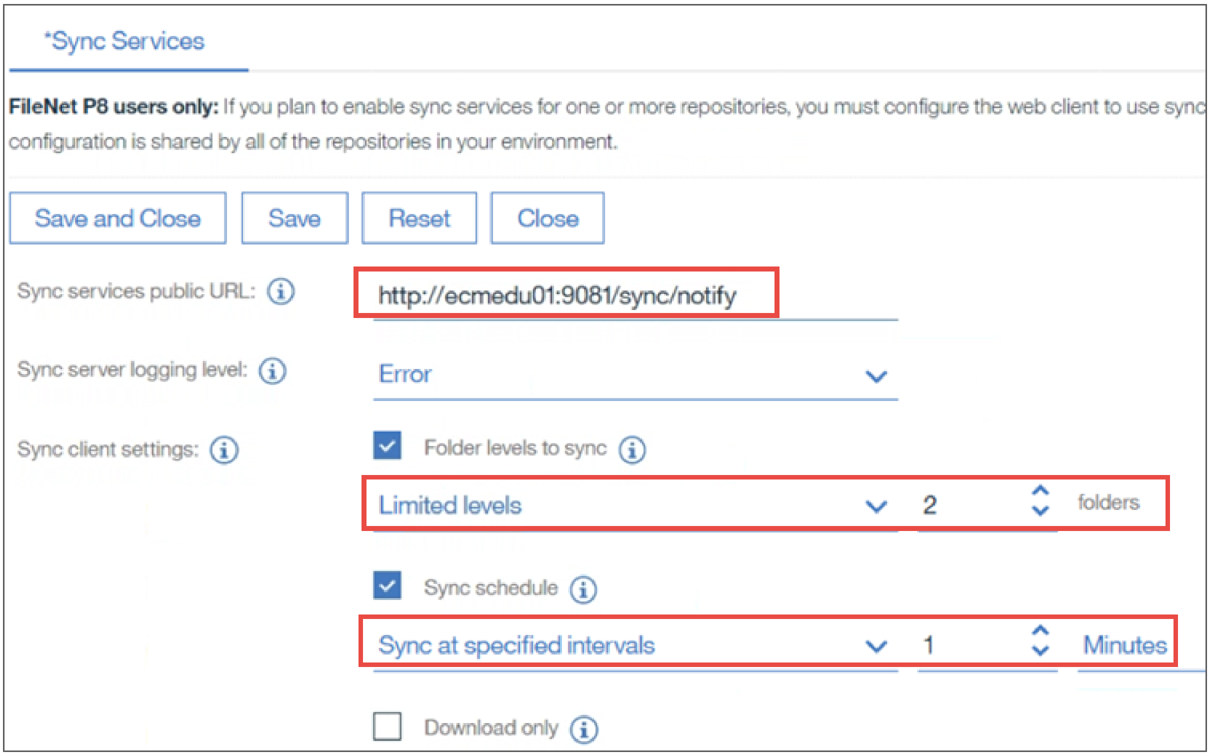
__ d. Verify that the schedule is set to **Sync at specific intervals** and **1 Minutes**.



__ 5. Leave the **Download only** option unselected.

Information

If you enable the **Download only** option, it prevents the sync client from uploading any new documents or changes to any existing documents to the server. All the documents that are downloaded in this mode are read-only on the client desktop.

__ 6. Click **Save and Close**.

__ 7. Log out of the IBM Content Navigator administration tool.

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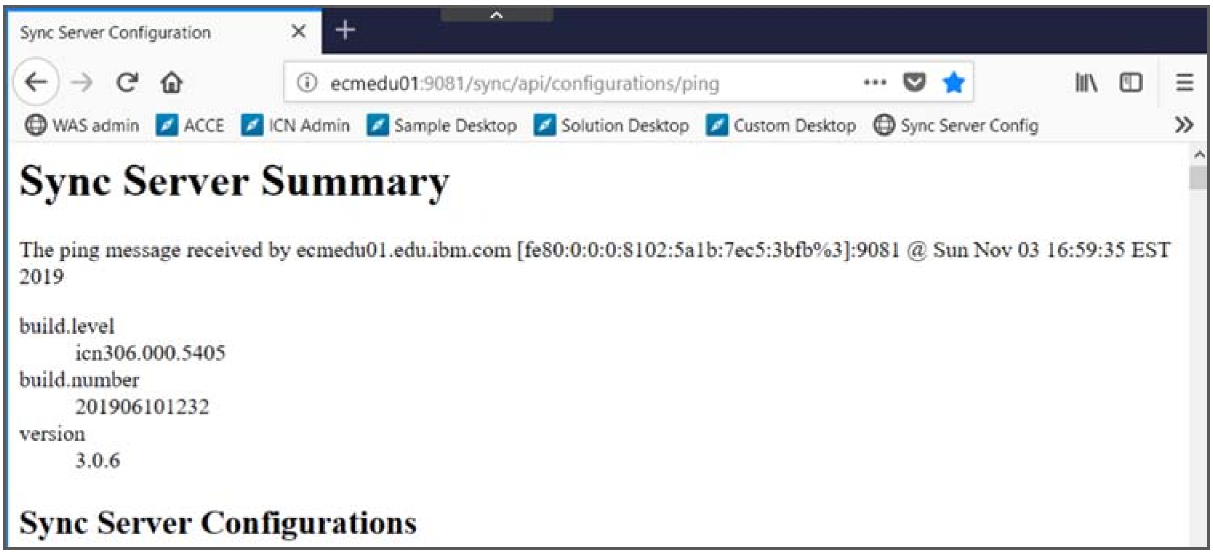
1.2. Check the sync server

__ 1. Open the **Firefox** browser and click the **Sync Server Config** shortcut or enter the following **URL**: `http://ecmedu01:9081/sync/api/configurations/ping`

__ 2. When you are prompted for the default realm, enter the credentials:

- **User name**: `Administrator`
- **Password**: `FileNet1`

__ 3. Verify that the **Sync Server Summary** page is displayed which indicates that **Sync Server** is running.



__ 4. Close the browser.

Troubleshooting

If an HTTP 404 error is returned, **Sync Server** is not started. Check the values that you entered. Restart the web application servers using the troubleshooting section in Section 1, "Prepare your system: Start the components," on page 1-3.

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1.3. Enable the sync services for a repository

__ 1. Open the **Firefox** browser and log in to the IBM Content Navigator administration tool.

- The **ICN Admin** shortcut or go to the **URL**: `http://ecmedu01:9081/navigator/?desktop=admin`
- **User name**: `p8admin`
- **Password**: `FileNet1`

__ 2. On the left pane, click **Repositories**.

__ 3. On the **Repositories** tab, select **Sales** and click **Edit**.

__ 4. On the **Sales** tab, scroll down and click **Connect**.

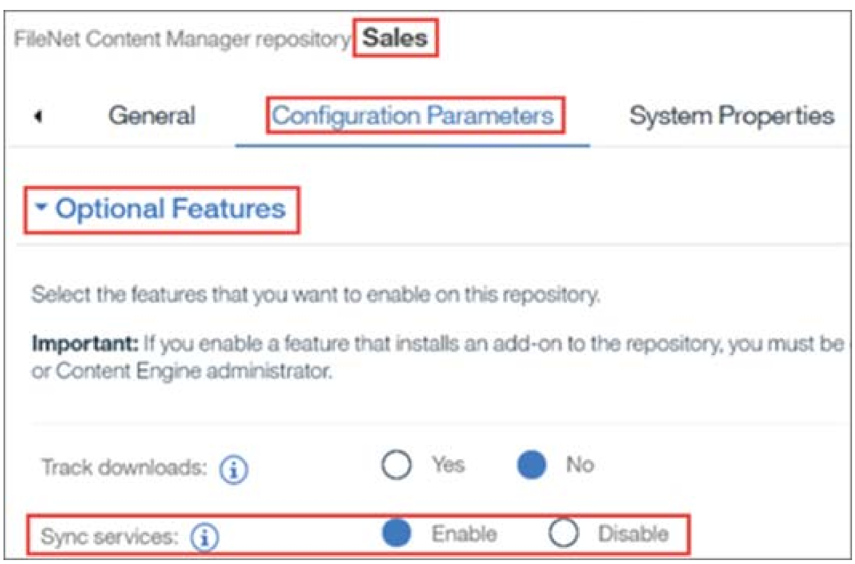
__ 5. Enter the following values and click **Log In**:

- **User name**: `p8admin`
- **Password**: `FileNet1`

You must connect to the repository as a FileNet Content Manager administrator. When you enable some features, an add-on is installed in the repository.

__ 6. Select the **Configuration Parameters** tab.

__ 7. Scroll down to **Optional Features** and for **Sync services**, select **Enable**.



__ 8. Click **Save and Close**.

__ 9. Close the **Repositories** tab.

__ 10. Leave the administration desktop open for the next section.

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1.4. Enable the sync services on a desktop

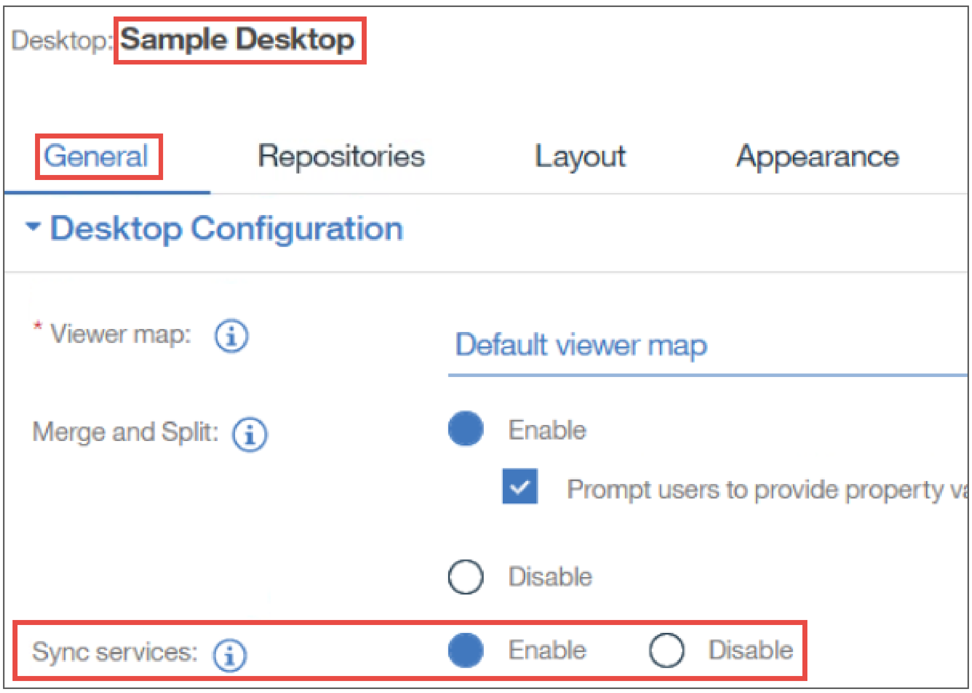
In this section, you enable the sync services on the desktop that contains repositories which are used to sync items.

__ 1. In the **Desktops** tab, select **Sample Desktop** and click **Edit**.

__ 2. Enable **Sync services**.

__ a. On the **General** subtab, scroll down to the **Desktop Configuration** section.

__ b. For **Sync services**, select **Enable**.



__ c. Click **Save and Close**.

__ d. Click **Close** when you are prompted to refresh the browser.

__ 3. Log out of the Content Navigator desktop and close the browser.

1.5. Enable sync for a folder

__ 1. Open the **Firefox** browser and log in to the IBM Content Navigator **Sample Desktop**.

- The **Sample Desktop** shortcut or **URL**: `http://ecmedu01:9081/navigator/?desktop=SampleDesktop`
- **User name**: `p8admin`
- **Password**: `FileNet1`

__ 2. On the left pane, right-click the **Items_For_Syncing** folder and select **Enable Sync**.

The folder now shows the sync icon. It indicates that the folder is set up for local sync.

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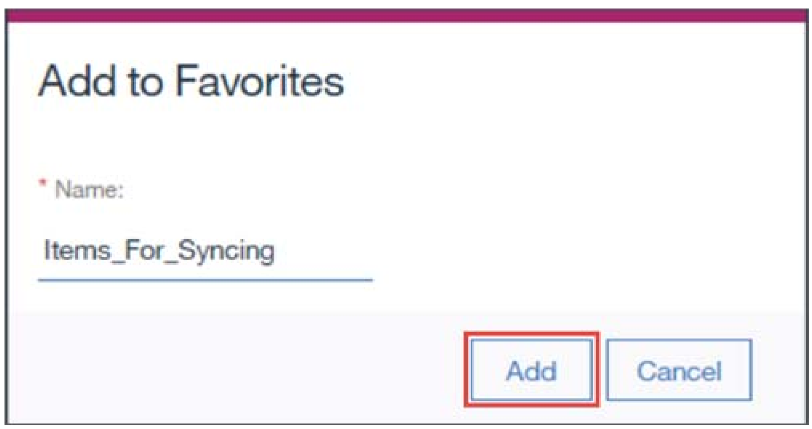
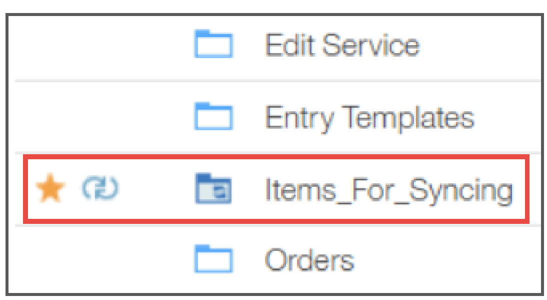
__ 3. Add the folder to Favorites.

__ a. Right-click the **Items_For_Syncing** folder again and select **Add to Favorites**.

__ b. On the **Add to Favorites** dialog box, click **Add**.



__ 4. On the left pane, click **Sales** and on the right pane, verify that the **Items_For_Syncing** folder has both the sync (blue) icon and the favorite (orange star) icon.



__ 5. Log out of the desktop and close the browser.

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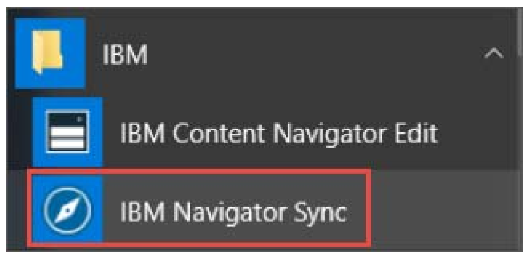
Section 2. Configure the sync client

In this section, you configure the sync client to use a default local folder and specify an IBM Content Navigator desktop from where you want to sync the items. The sync client is normally configured on a client system. For this lesson, you use the sync client on the same student system where the server is configured.

Information

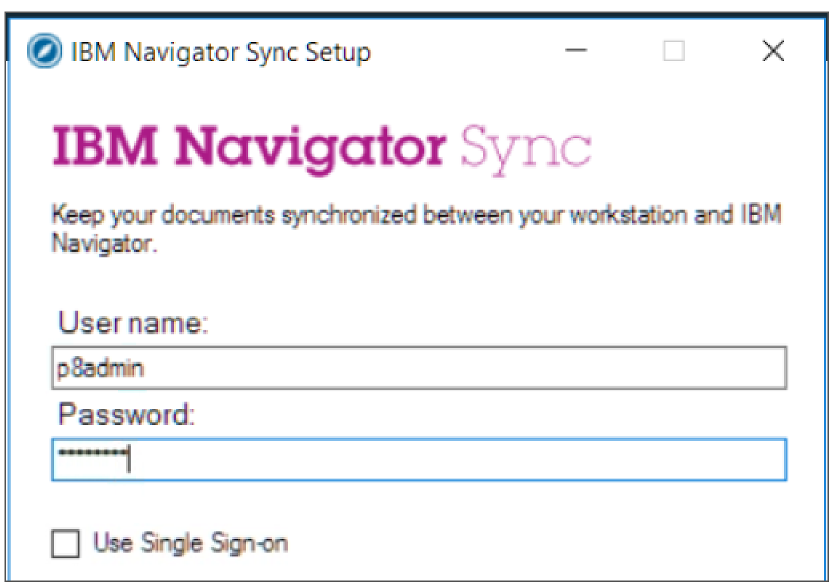
The initial configuration for the sync client is completed on your student system. For your reference, the steps are provided here:

__ 1. Click **Start** from the Windows program menu, select **IBM** > **IBM Navigator Sync**.



__ 2. Log in as an IBM Content Navigator:

- Administrative user name: **p8admin**
- Password: **FileNet1**



__ 3. Click **Next**.

__ 4. For the **IBM Navigator URL** field, enter the URL for an IBM Content Navigator desktop: `http://ecmedu01:9081/navigator/?desktop=SolutionDesktop`

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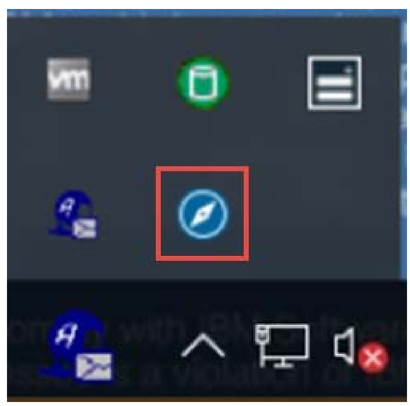
__ 5. Click **Start Sync** and you get a message that the content is synced.

IBM Navigator Sync creates a root folder that is called **IBM Sync** on the local system. It also creates a top-level folder for each of the IBM Content Navigator desktops that is enabled for the sync services and configured on the sync client.

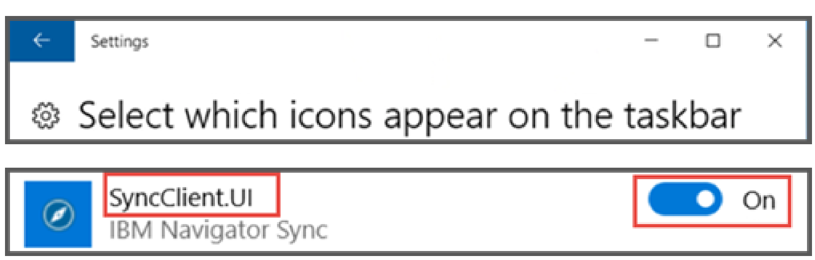
Example: **C:\Users\Administrators\Documents\IBM Sync\Solution Desktop**

__ 6. After the initial configuration, click the **IBM Navigator Sync** icon from the system tray on the taskbar to access the client.



__ 7. If the icon is not visible in the system tray, complete the following steps:

- Right-click the system tray and then click the **Settings** gear icon.
- On the **Settings** page, scroll down to **Notification Area** and click **Select which icons appear on the taskbar** link.
- For the **SyncClient.UI** field, change the option to **On**.



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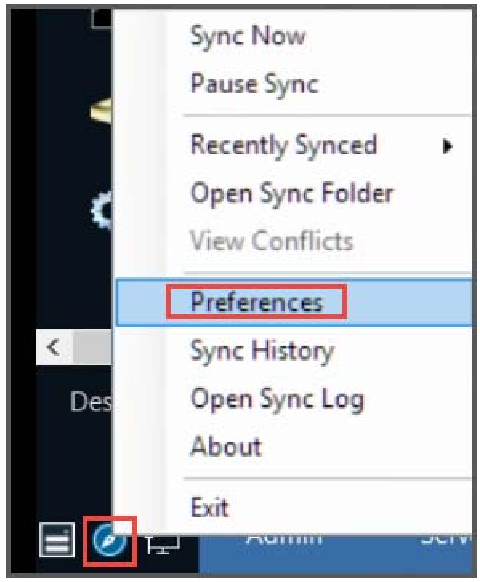
2.1. Configure IBM Navigator Sync Preferences

__ 1. Right-click the **IBM Navigator Sync** icon on the system tray of the taskbar and select **Preferences**.



__ 2. On the **IBM Navigator Sync Preferences** > **Settings** tab, notice that you can click **Sync now** to sync the items immediately.

__ 3. Leave the default sync folder: `C:\Users\Administrator\Documents\IBM Sync`

You access synced documents and folders from this folder on your system.

Optionally, you can specify a different folder to be your local sync folder.

__ 4. Add **Sample Desktop** to sync.

__ a. Click the **Desktops** tab and notice that **Solution Desktop** is already configured for sync.

__ b. Click **Add**.

__ c. For the **Display Name** field, enter: `Sample Desktop`

__ d. Specify the **URL** for **Sample Desktop**:
`http://ecmedu01:9081/navigator/?desktop=SampleDesktop`

Since it is the default desktop, you can also use this URL:
`http://ecmedu01:9081/navigator/`

__ e. Enter the following values:

- **User name**: `p8admin`
- **Password**: `FileNet1`

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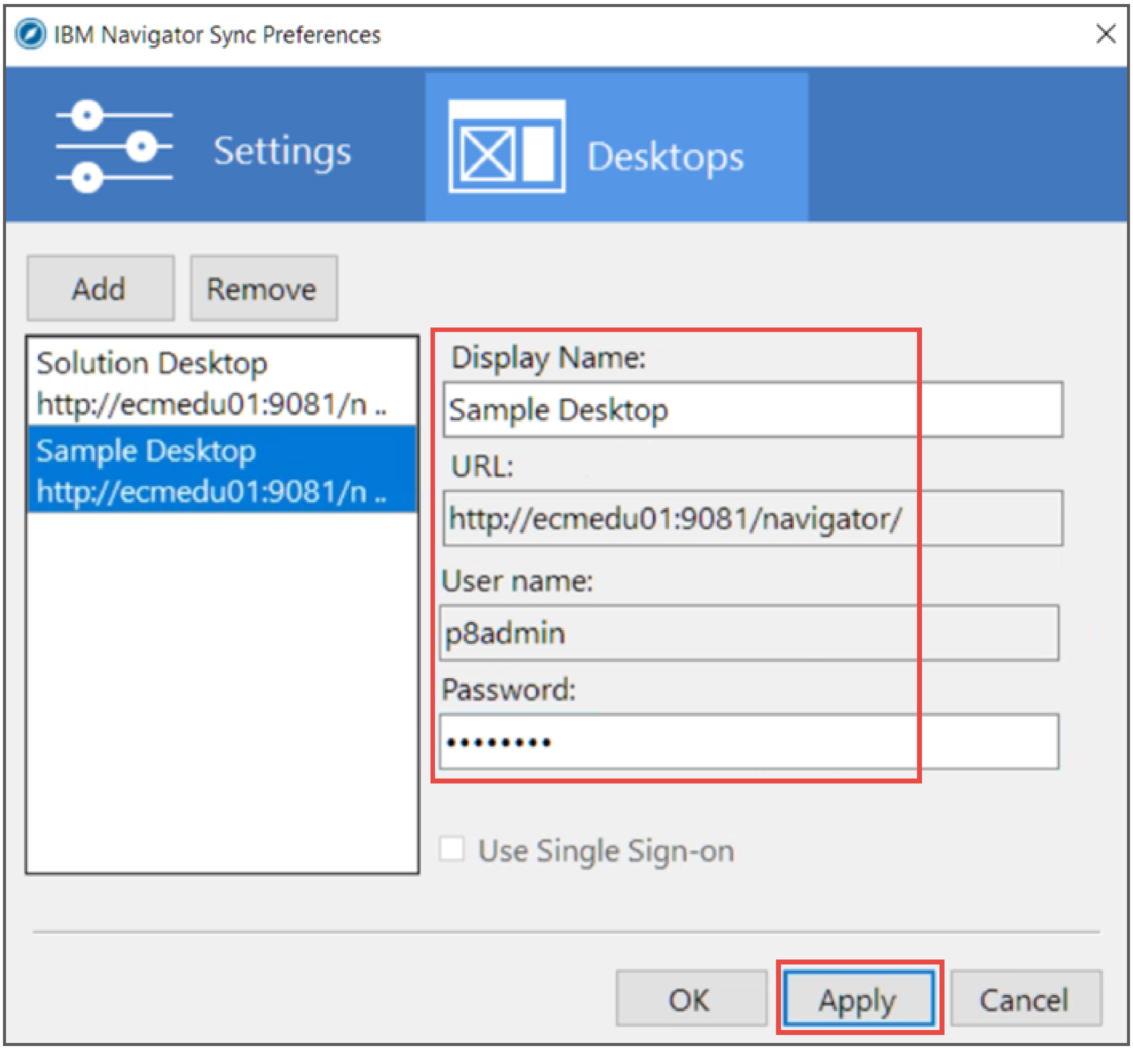
__ f. Click **Apply** and verify that **Sample Desktop** is listed.



__ 5. Click **OK** to close **IBM Navigator Sync Preferences**.

2.2. Verify the synced items

__ 1. Right-click the **IBM Navigator Sync** icon on the system tray of the taskbar and select **Sync Now**.

Syncing begins immediately. Wait for the **IBM Navigator Sync** icon to stop spinning to complete the sync.

__ 2. Right-click the **IBM Navigator Sync** icon again and select **Open Sync folder** from the list.

The sync client opens the folders in **Windows Explorer.**

__ 3. Verify that the sync folder is created for the **Sample Desktop** and the **Items_For_Syncing** repository folder: `C:\Users\Administrator\Documents\IBM Sync\Sample Desktop\Items_For_Syncing`

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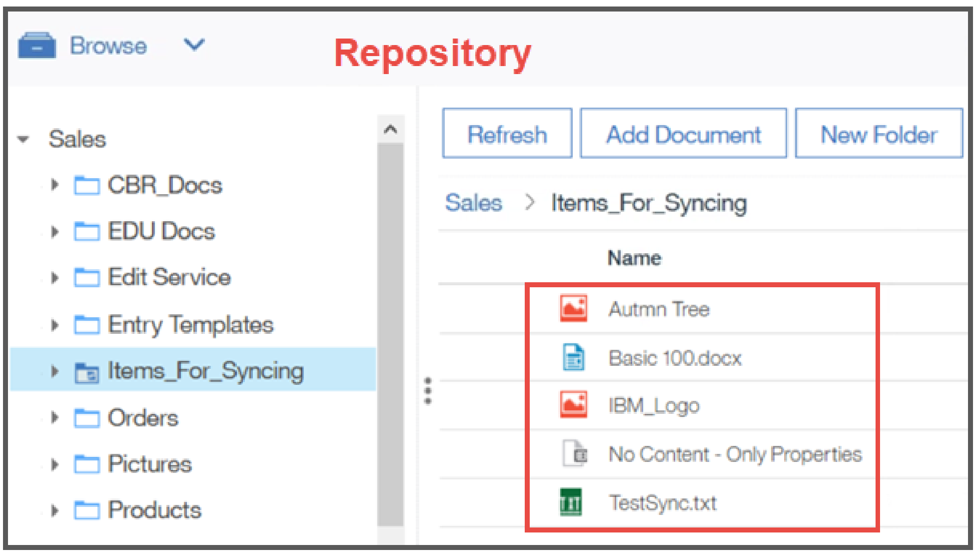
Leave Windows Explorer open and compare the list of documents in the local sync folder: **Items_For_Syncing** with the IBM Content Navigator repository folder.

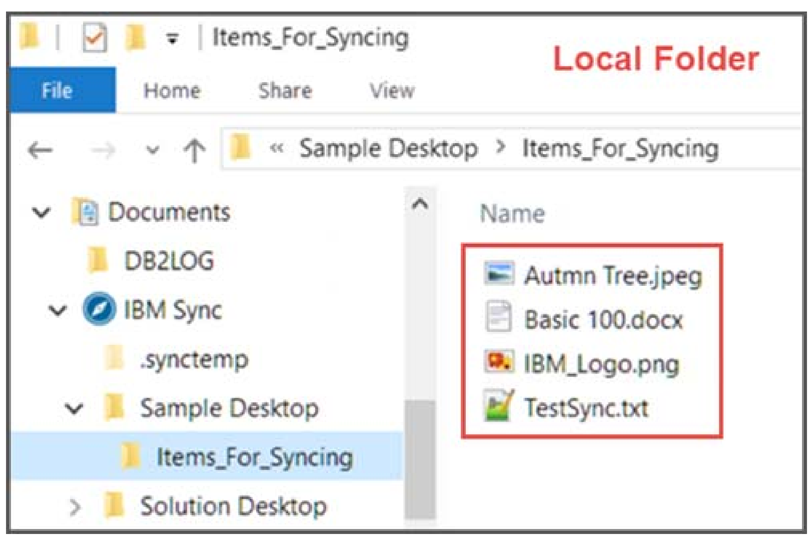
__ 4. Open the Firefox browser and log in to the IBM Content Navigator **Sample Desktop**.

- The **Sample Desktop** shortcut or URL: `http://ecmedu01:9081/navigator/?desktop=SampleDesktop`
- User name: `p8admin`
- Password: `FileNet1`

__ 5. On the left pane, click the **Items_For_Syncing** folder.

__ 6. Compare the documents in the local folder with the ones in the repository folder on IBM Content Navigator.





All the items in repository folder are synced to the local folder except **No Content-Only Properties**.

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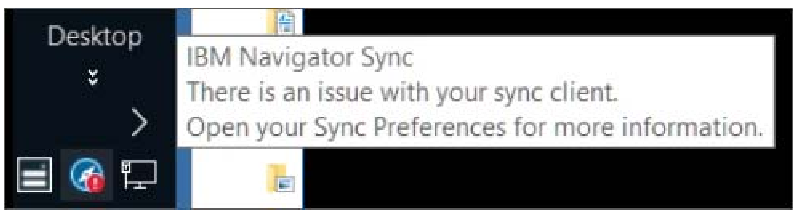
The document is not listed in the local folder because it does not have content and contains only information about the document in the properties.

IBM Navigator Sync processes documents that has no content but they are not listed in the file system. It syncs the documents automatically when the user checks in a new version with content, and they are listed in the file system.

__ 7. Log out of IBM Content Navigator **Sample Desktop** and close the browser.

Troubleshooting

If the sync client is running before the WebSphere Application Server is started, the **IBM Navigator Sync** icon shows a red mark for an error because it cannot reach the server. Hover over the **IBM Navigator Sync** icon to see the error. The error message indicates to check the Sync Preferences.



To fix the error, complete the following steps:

__ 1. Start the **WebSphere Application** Server.

Refer to the Section 1, "Prepare your system: Start the components," on page 1-3 for the detailed steps.

__ 2. Right-click the **IBM Navigator Sync** icon in the system tray on the taskbar and select **Preferences**.

__ 3. On the **IBM Navigator Sync Preferences** dialog box, Select the **Desktops** tab.

__ 4. Select **SampleDesktop** on the left pane and click **OK**.

__ 5. Verify that the **IBM Navigator Sync** icon does not show the error.

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Section 3. Sync content across multiple devices

IBM Navigator Sync provides a two-way sync of repository objects for different devices such as mobile devices, Windows, and Mac systems.

3.1. Add or modify documents from your local folder

In this section, you edit an existing file, create a folder, and a document in the local sync folder. When you edit the documents in the sync folder locally, it saves the document automatically as a new version on the repository. You verify that the new documents and folders are synced back to the repository in IBM Content Navigator.

__ 1. If the local sync folder is not already open, open it.

  __ a. In the system tray, right-click the **IBM Navigator Sync** icon and select **Open Sync folder** from the list.

  The sync client opens the folders in **Windows Explorer:** `C:\Users\Administrator\Documents\IBM Sync`

  __ b. In **Windows Explorer**, open the `Sample Desktop\Items_For_Syncing` folder.

__ 2. Edit a document in the local folder.

  __ a. Open the **TestSync.txt** file in **Notepad++**.

  __ b. Edit the file and enter some text.

  __ c. Save and close the file.

__ 3. In **Windows Explorer** > **Items_For_Syncing** folder, create a folder with the name: **TestSyncFolder**

__ 4. In **Windows Explorer**, navigate to the `C:\Training\WF270G\SampleDocs` folder, copy **MarketingPlan1.pdf**, and paste it to the **TestSyncFolder** folder.

__ 5. In the system tray, right-click the **IBM Navigator Sync** icon and select **Sync Now** from the list.

Hint

The items are synced automatically between the repository and the local folder at the time intervals that the administrator sets. For this section, you do a manual sync to view the synced items immediately on the server.

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3.2. Verify the synced items on the repository

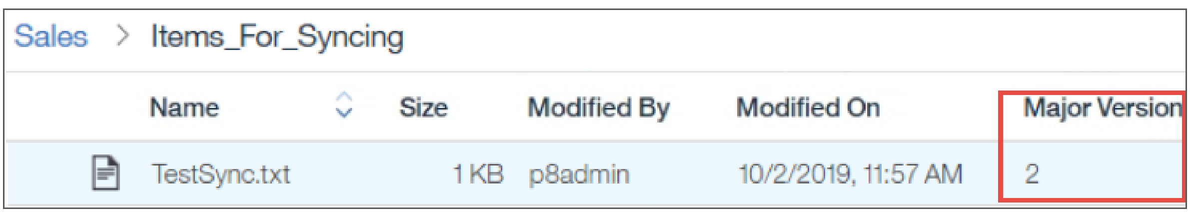
__ 1. Open the **Firefox** browser and log in to the IBM Content Navigator **Sample Desktop**.

- The **Sample Desktop** shortcut or **URL**:
  `http://ecmedu01:9081/navigator/?desktop=SampleDesktop`
- **User name**: `p8admin`
- **Password**: `FileNet1`

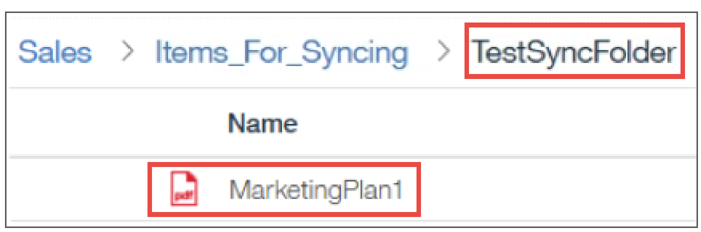
__ 2. On the left pane, click **Items_For_Syncing** and on the right pane, verify the following items.

- **TestSync.txt** has the time stamp for when you edited the file.
- For the **TestSync.txt** row, **Major Version** is: **2**

  The previous major version was 1 and it is advanced to 2 after you edited and synced the document.



- The **TestSyncFolder** folder that you created locally is synced.
- The file that you added in the local folder is listed in **TestSyncFolder**.



__ 3. Leave IBM Content Navigator open for the next section.

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Section 4. Sync a teamspace

Your team uses an IBM Content Navigator teamspace to organize your work. You sync this teamspace locally to access the documents within your teamspace offline.

In this section, you enable sync for a teamspace in IBM Content Navigator and sync locally.

4.1. Enable sync for a teamspace

__ 1. If you are not already logged in to the IBM Content Navigator **Sample Desktop**, log in:

- The **Sample Desktop** shortcut or URL: `http://ecmedu01:9081/navigator/?desktop=SampleDesktop`
- User name: `p8admin`
- Password: `FileNet1`

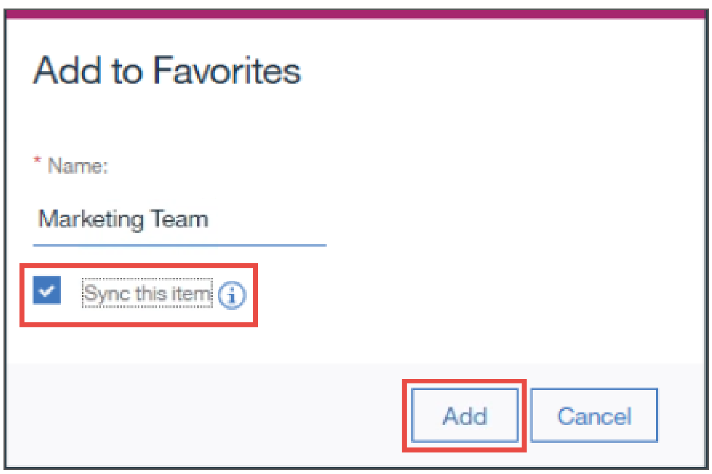
__ 2. Switch from the **Browse** view to **Teamspaces**.

__ 3. On the **Teamspaces** tab, on the upper right, ensure that the **Sales** repository is selected.

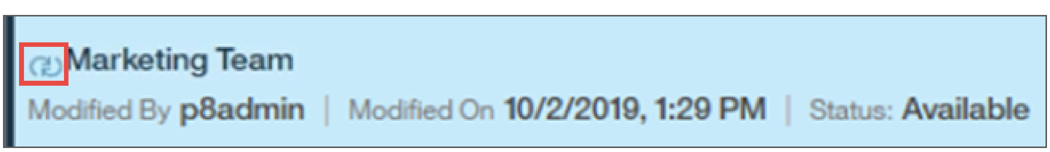
__ 4. Add a teamspace to your list of favorites and enable sync.

__ a. Right-click **Marketing Team** and select **Add to Favorites** from the menu list.

__ b. On the **Add to Favorites** dialog box, select **Sync this item** and click **Add**.



__ c. Verify that **Marketing Team** has a **Sync** icon besides it.



__ 5. Open the documents in the teamspace.

__ a. Click the **Marketing Team** link.

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__ b. In the **Marketing Team** tab, expand **Browse** > **Marketing Team** > **Market Info** and click **Presentations** on the left pane.

Documents that are contained in that folder are listed in the right pane.

__ 6. Leave IBM Content Navigator open for the next section.

4.2. Verify the synced teamspace locally

__ 1. Right-click the **IBM Navigator Sync** icon in the system tray and select **Sync Now**.

Wait for the sync to complete.

__ 2. Open the sync folder and verify the contents.

__ a. Right-click the **IBM Navigator Sync** icon again, and click **Open Sync folder**.

The sync folder opens in Windows Explorer. The default location is: `C:\Users\Administrator\My Documents\IBM Sync`

__ b. Open the **Sample Desktop** folder, and verify that it contains a folder with the teamspace name: **Marketing Team**

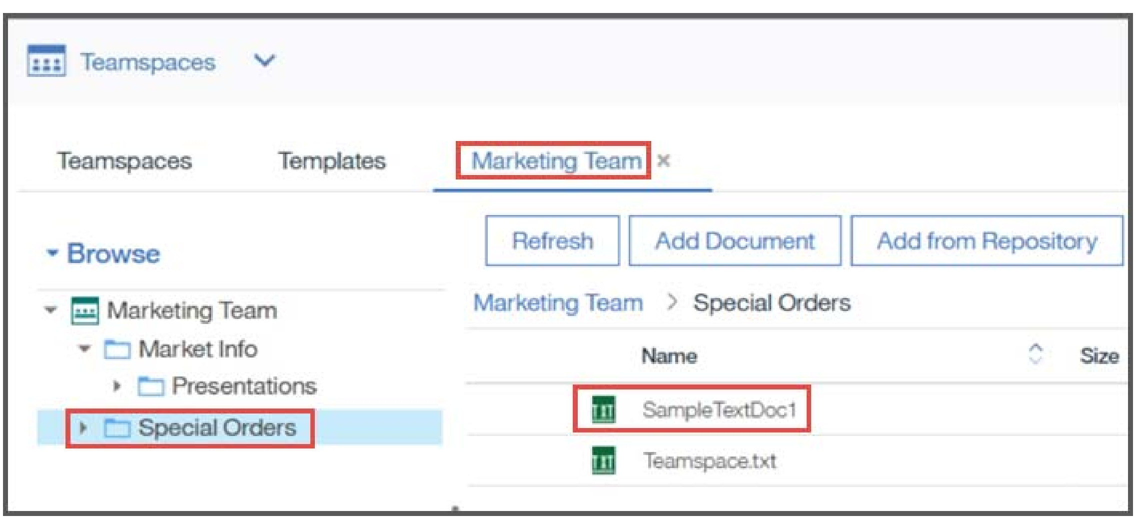
__ c. Compare the folder, subfolders, and documents in the local folder with the ones in IBM Content Navigator.

__ 3. In the `C:\Training\WF270G\SampleDocs` folder, copy **SampleTextDoc1.txt** and paste it to the **Marketing Team** >**Special Orders** sync folder.

__ 4. Right-click the **IBM Navigator Sync** icon in the system tray and select **Sync Now** and wait for the sync to complete.

__ 5. Go back to **Marketing Team** teamspace in the **Sample Desktop** and verify that the file was added to the **Special Orders** folder.

Refer to the Section 4.1, "Enable sync for a teamspace," on page 6-16 for the detailed steps to open the teamspace and folders.



__ 6. Log out of IBM Content Navigator and close the browser.

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Section 5. Resolve sync conflicts

In an example scenario, multiple users in your team work on the same documents in your teamspace:

- **Clara** checks out the document from the repository and checks it in after she completes the edits.
- The **p8admin** user has a synced local copy of the same document before **Clara** checked it in.
- The **p8admin** user edits the file offline and then tries to sync the document to the repository.

The sync client detects a version conflict between **Clara**'s version on the repository and **p8admin**'s version on the local system and flags the conflict.

The sync client provides options to resolve the conflict. In this section, you simulate a version conflict and then resolve it.

5.1. Simulate a version conflict

In this section, you simulate a version conflict for a document between multiple users.

__ 1. Right-click the **IBM Navigator Sync** icon in the system tray and select **Pause Sync**.

This step pauses the sync client to simulate that **p8admin** is offline since you logged in to the sync client as **p8admin**.

__ 2. Log in to the IBM Content Navigator **Sample Desktop** as a different user.

- The **Sample Desktop** shortcut or **URL**: `http://ecmedu01:9081/navigator/?desktop=SampleDesktop`
- **User name**: `Clara`
- **Password**: `FileNet1`

__ 3. Open the **Marketing Team** teamspace.

__ a. Switch from the **Browse** view to **Teamspaces**.

__ b. On the **Teamspaces** tab, click the **Marketing Team** link.

__ 4. Check out the **Teamspace.txt** document.

__ a. On the **Marketing Team** tab, click **Special Orders**.

__ b. On the right pane, right-click **Teamspace.txt** and select **Check Out** > **Check Out Only**.

__ 5. Check in the **Teamspace.txt** document to create a new version.

__ a. Right-click the **Teamspace.txt** and select **Check In**.

__ b. On the **Check In** page, click **Browse**, navigate to the `C:\Training\WF270G` folder, select **Teamspace_Updated.txt**, and click **Open**.

__ c. Click **Check In**.

__ 6. On the **Marketing Team** tab, verify that the **Teamspace.txt** document has **Major Version**: 2

__ 7. Log out of IBM Content Navigator and close the browser.

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__ 8. Edit the **Teamspace.txt** document in the local sync folder:

__ a. Right-click the **IBM Navigator Sync** icon, and select **Open Sync folder** from the menu list.

The `C:\Users\Administrator\Documents\IBM Sync` folder opens.

__ b. Navigate to `\IBM Sync\SampleDesktop\Marketing Team\Special Orders` folder, right-click **Teamspace.txt** and select **Edit with Notepad++**.

__ c. Edit the document and save it.

Enter some text to identify p8admin's edits: `p8admin's edits`

__ 9. Create a sync conflict with the other user.

__ a. Right-click the **IBM Navigator Sync** icon in the system tray and select **Resume Sync**.

This step creates a version conflict and the **IBM Navigator Sync** icon shows an yellow triangle symbol.

__ b. If you don't see the conflict flag, right-click the **IBM Navigator Sync** icon in the system tray again, and select **Sync Now**.

__ c. Hover over the flag and verify that you get a conflict notification.

You resolve this conflict in the next section.

Hint

For **p8admin**, the sync client was offline because you paused the client.

When you resume the sync to simulate that **p8admin** is online, the client tries to sync the updated local document with the repository. If the sync client detects any version conflict for the document on the repository, it shows the conflict message.

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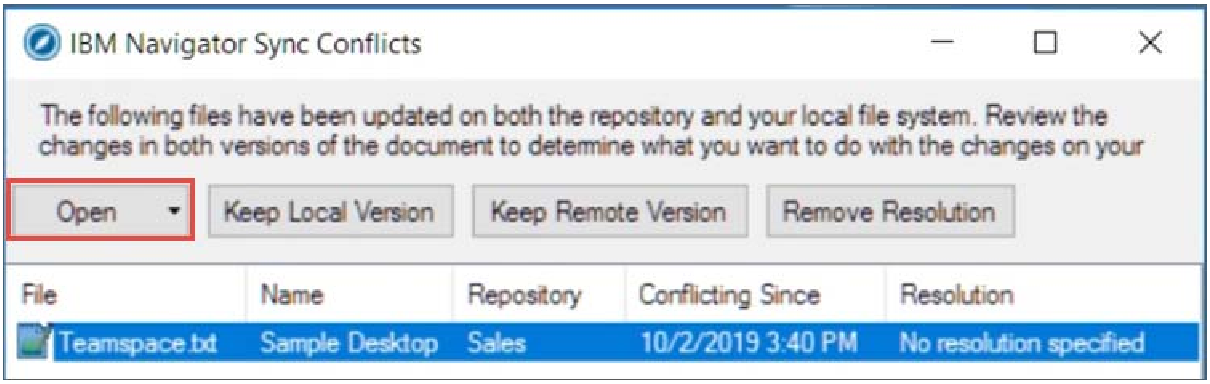
5.2. View and resolve sync conflicts

In this section, you view the conflict and select one of the options in **IBM Navigator Sync Conflicts** to resolve the conflict.

__ 1. Right-click the **IBM Navigator Sync** icon in the system tray and select **View Conflicts**.

__ 2. On the **IBM Navigator Sync Conflicts** page, select: **Teamspace.txt**



__ 3. Click **Open** and select **Open Repository Version** from the list.

__ 4. When you are prompted for logon, enter the following credentials:

- **User ID**: `p8admin`
- **Password**: `FileNet1`

The repository copy of this text document is opened in the browser tab.

__ 5. Verify that the changes, which **Clara** added is shown.

The file contains the text: `This file is used to check in a new verison.`

Troubleshooting

If the file is not opened, make sure that you select the file name from the list in the **IBM Navigator Sync Conflicts** window.

If it is a Microsoft Word or other type of document, you might get a prompt in your browser to download the file.

__ 6. Close the browser.

__ 7. View the local copy.

In **IBM Navigator Sync Conflicts**, the conflicting file is selected.

__ a. Click **Open** and select **Open Local Version**.

The file opens in **NotePad++**.

__ b. Notice that the changes that **p8admin** added are shown on the file.

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Information

You can also select **Open Local Containing Folder** to open the folder that contains the file.

__ 8. Resolve the conflict.

For this scenario, the decision is to keep the local copy.

__ a. In **IBM Navigator Sync Conflicts**, make sure that the conflicting file is selected.

__ b. Click **Keep Local Version**.

This option adds the local copy as the new version on the repository.

The previous repository copy that **Clara** edited is still available as a superseded version and can be restored.

__ c. Click **OK** and close **IBM Navigator Sync Conflicts**.

__ 9. Review the changes to the teamspace document.

__ a. Log in to the **Sample Desktop** as **p8admin**.

__ b. Open the **Marketing Team** > **Special Orders** folder.

For more details on how to open the folder, refer to Section 5.1, "Simulate a version conflict," on page 6-18

__ c. On the right pane, verify that for the **Teamspace.txt** row, the **Modified by** column shows **p8admin** and **Major Version**: **3**

__ d. Double-click **Teamspace.txt** to open it and verify that it contains the content that p8admin edited locally.

Information

In other situations, if you decide to keep the repository copy, in **IBM Navigator Sync Conflicts**, click **Keep Remote Version**.

The **Remove Resolution** option removes the resolution that is selected.

End of exercise

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Exercise 7. Configuring and using the Edit Service client

Estimated time

01:00

Overview

In this exercise, you learn how to configure the Edit Service client for IBM Content Navigator and use it to edit the documents in their native applications.

Objectives

After completing this exercise, you should be able to:

- Configure the Edit Service client
- Use the Edit Service client to edit repository documents

Introduction

In this exercise, you enable and configure the Edit Service client for IBM Content Navigator. You use the Edit Service client to add and edit repository documents in their respective native applications.

This exercise includes the following sections:

Section 1, "Configure the Edit Service client," on page 7-2

Section 2, "Use the Edit Service client to edit repository documents," on page 7-7

Requirements

The activities in this unit assume that you have access to the student system that is configured for these activities and all components are running when you begin an exercise.

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Section 1. Configure the Edit Service client

Important

Before you begin the exercises, ensure that the components are running. If you did not start the components already, refer to Section 1, "Prepare your system: Start the components," on page 1-3 to start them.

1.1. Enable the Edit Service client for a repository

__ 1. Start the IBM Content Navigator administration tool.

__ a. Open the Firefox browser and click the **ICN Admin** shortcut. Or go to the **URL**: `http://ecmedu01:9081/navigator/?desktop=admin`

__ b. Enter the following credentials:

- **User name**: `p8admin`
- **Password**: `FileNet1`

__ c. Click **Log in**.

__ 2. Edit the **Sales** repository.

__ a. On the left pane, click **Repositories**.

__ b. On the **Repositories** tab, select **Sales** and click **Edit**.

__ c. On the **Sales** tab, click **Connect**.

__ d. Enter the following credentials and click **Log In**:

- **User name**: `p8admin`
- **Password**: `FileNet1`

__ 3. Enable the Edit Service client.

__ a. Select the **Edit Integration** subtab.

Hint

If the tab is not visible, click the forward arrow to access more tabs. You can also click the down arrow on the upper right and select the tab.

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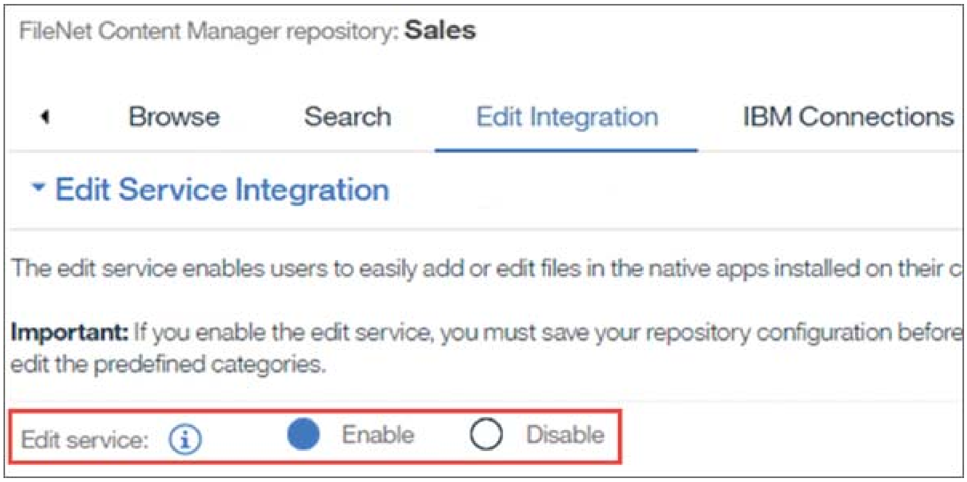
__ b. Scroll down to **Edit Service Integration**, for **Edit service**, select **Enable**.



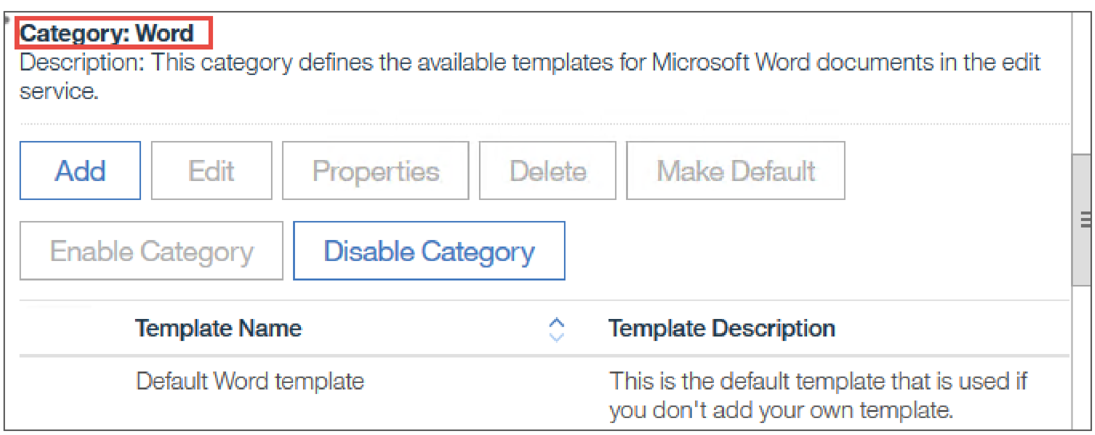
__ 4. Click **Save**.

__ 5. Leave the **Edit Integration** subtab open for the next section.

1.2. Create a custom category

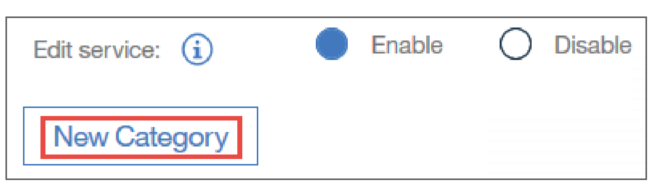
In this section, you create a custom category for text files to enable users to create and edit text documents.

__ 1. In the **Edit Service Integration** section, notice the default categories and the corresponding templates that are available after you enable the Edit service: **Word**, **Excel**, and **PowerPoint**



__ 2. Create a custom category with the name **Text** for text files.

__ a. Click **New Category.**



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__ b. For **Display Name** and **Description**, enter: Text

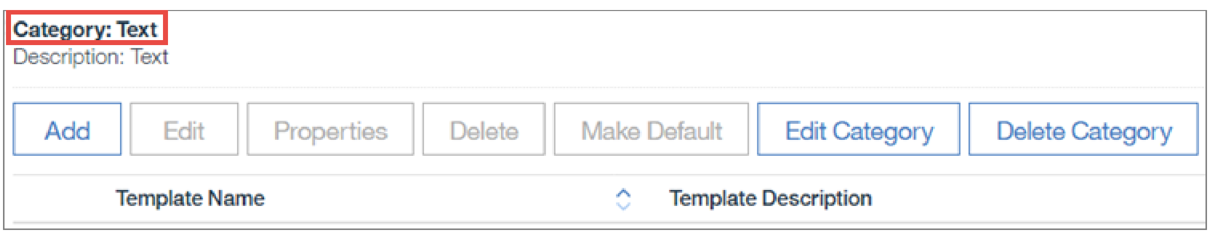
The **ID** field is automatically populated.

__ c. In **Available MIME Types**, select the following **text** MIME types: **text/xml**, **text/plain**, **text/richtext**, **text/htm**, and **text/html**

__ d. Move them to **Selected MIME Types**.

__ e. Click **OK**.

__ 3. Click **Save** and verify that the new category: **Text** is listed.



__ 4. Add a template to the **Text** category:

__ a. In the **Text** category, click **Add**.

__ b. On the **Add a Text Template** page, verify that **Save in** field already has the value: **Sales**

__ c. Click **Browse** and navigate to the `C:\Training\WF270G\SampleDocs` folder.

__ d. Select **SampleTextDoc1.txt** and click **Open**.

The document file type must be text.

The document title is automatically populated with the file name.

__ 5. Set security to the template so that users can access the template.

__ a. In the **Security** section, for **Owner**, verify that **Administrator**, **p8admin** and **p8admins** are listed.

__ b. For **Reader**, click **Managers**, and for **Permissions**, select **Owner**.

__ c. Click **OK**.

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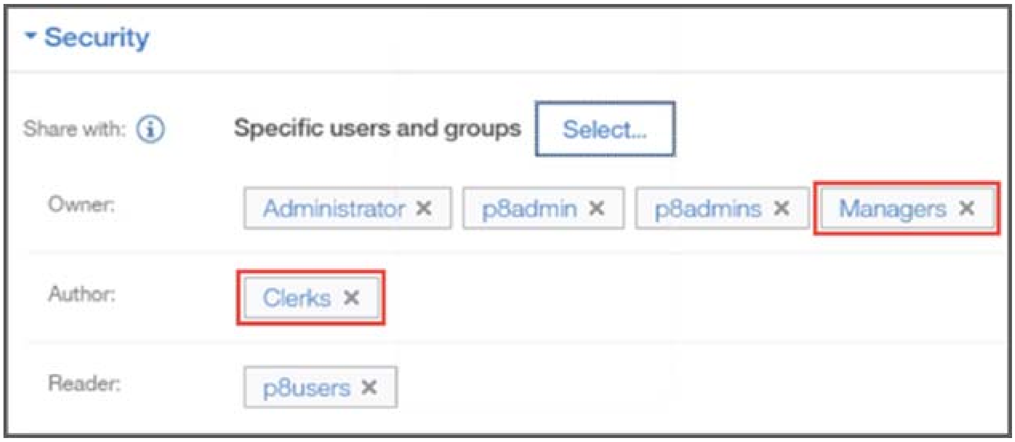
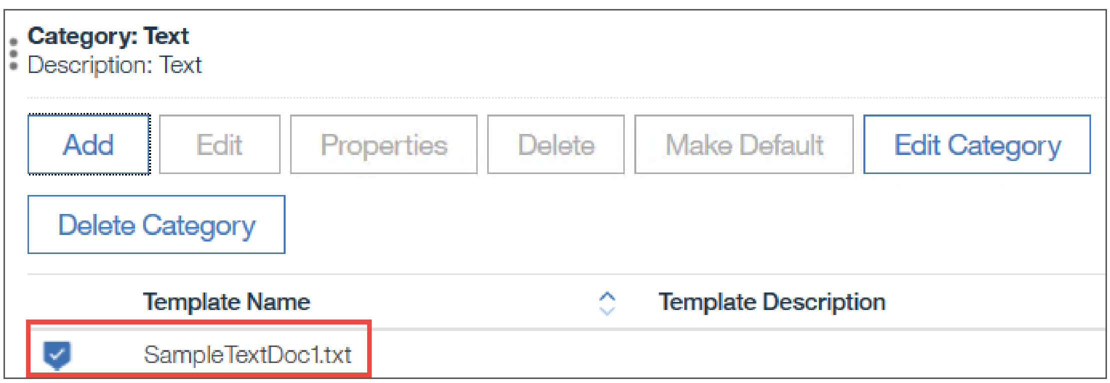
__ d. Move **Clerks** to **Author**.



__ 6. Click **Add**.

The file is added to the repository.

__ 7. Verify that the template: **SampleTextDoc1.txt** is the default as indicated by a blue symbol.



Note

If you have multiple templates that are associated with a category, you can specify which template is selected by default. The specified template is selected by default in the **New Document** window when the user clicks **New** > **Document**.

__ 8. Click **Save and Close**.

__ 9. Close the **Repositories** tab and leave the IBM Content Navigator administration tool open for the next section.

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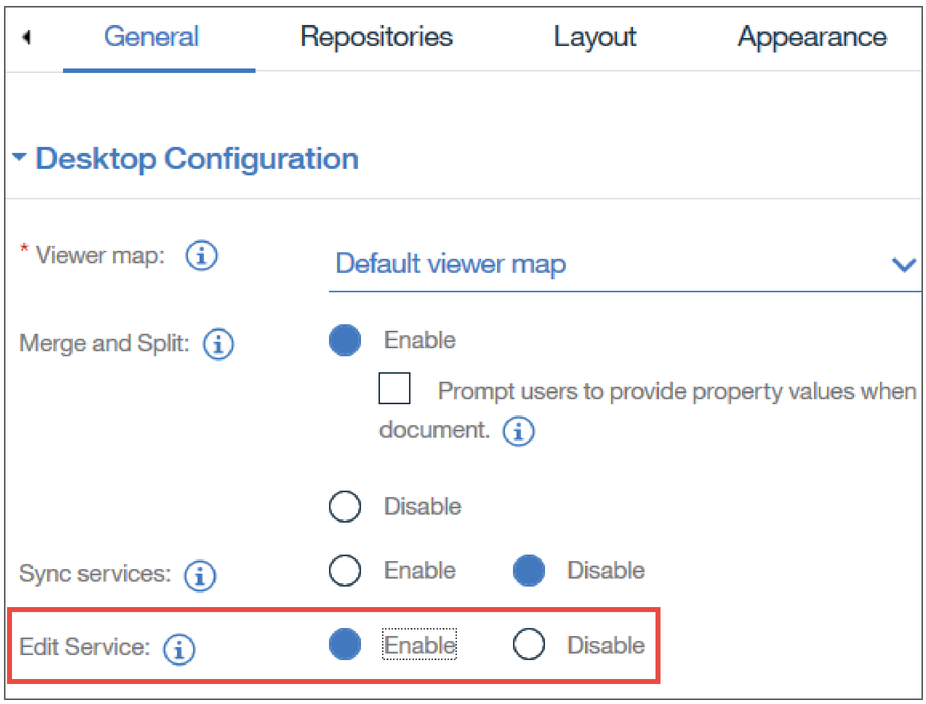
1.3. Enable the Edit Service client for a desktop

In this section, you enable the Edit Service client on the desktop that contains repositories where you want users to be able to edit documents.

__ 1. On the **Desktops** tab, select **Sample Desktop** and click **Edit**.

__ 2. On the **General** subtab, scroll down to the **Desktop Configuration** section.

__ 3. For **Edit Service**, select **Enable**.



__ 4. Click the **Repositories** subtab and verify that the desktop includes **Sales**.

__ 5. Click **Save and Close**.

__ 6. When you are prompted to refresh, click **Close**.

__ 7. Log out of the IBM Content Navigator administration tool and close the browser.

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Section 2. Use the Edit Service client to edit repository documents

In this section, you add and edit the documents on the repository.

2.1. Use the Edit with Desktop apps action

In this section, you test the **Edit with Desktop apps** action, which opens the document in its native application.

Note

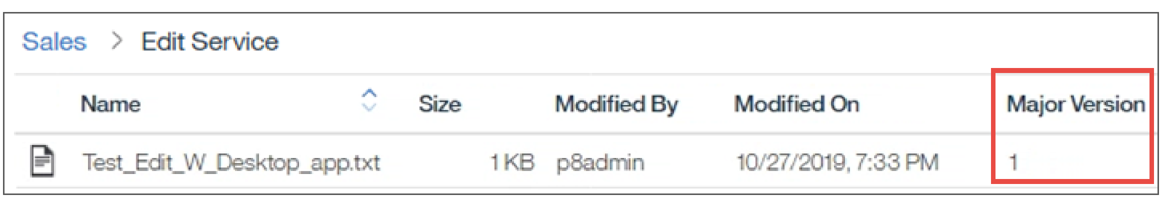
Notepad++ is configured as the default application on your student system for text files.

__ 1. Log in to the IBM Content Navigator **Sample Desktop**.

- The **Sample Desktop** shortcut or the URL: `http://ecmedu01:9081/navigator/?desktop=SampleDesktop`
- **User name**: `p8admin`
- **Password**: `FileNet1`

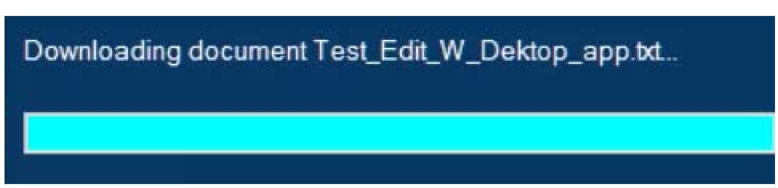
The **Sales** repository is open in the **Browse** view.

__ 2. Click the **Edit Service** folder and check that **Test_Edit_W_Desktop_app.txt** has **Major Version**: **1**



__ 3. Right-click **Test_Edit_W_Desktop_app** and click **Edit** > **Edit with Desktop apps**.

The status is shown on the lower right.



__ 4. Verify that this action checks out the document and the document has a **Checked out** symbol.

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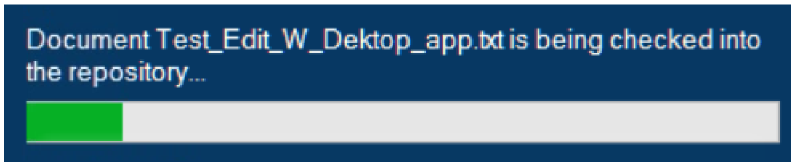
This action also opens the document in Notepad++.

__ 5. In Notepad++, edit the document to add some new text and save the file.

__ 6. Notice that the status is shown on the lower right.

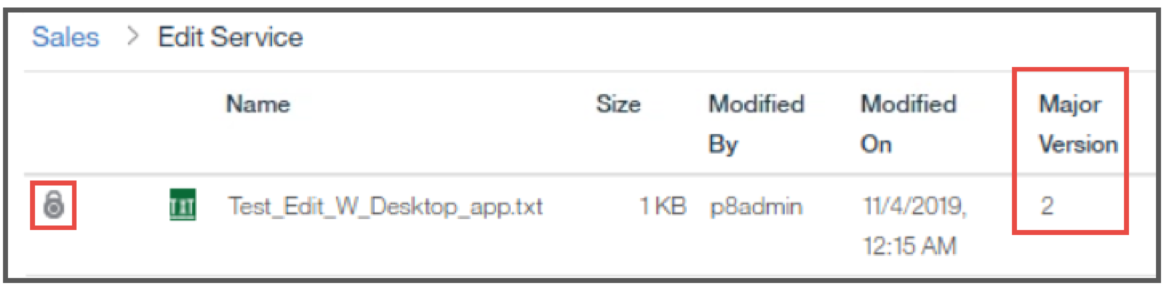


__ 7. Close the file.

On **Sample Desktop**, the **Sales** > **Edit Service** folder is already open.

__ 8. Click **Refresh** and verify that the document now has **Major Version**: **2**

The document has checked out icon.



Note

When you edit the document and save:

- If you use the Microsoft applications, the applications lock the file. The document is checked in when the application exits.
- If you use applications such as Notepad or Notepad++, these applications do not lock the file. The changes to the document are checked in as a new version each time the user saves the document, and then the document is immediately checked out again.

__ 9. Right-click **Test_Edit_W_Desktop_app** and click **Cancel Check Out**.

__ 10. Leave the IBM Content Navigator **Sample Desktop** open for the next section.

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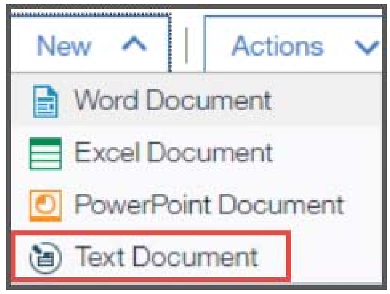
2.2. Check the New > Text Document action

In this section, you create a document that is based on the template that you configured.

The **Sample Desktop** is open in **Browse** view and the **Edit Service** folder is open.

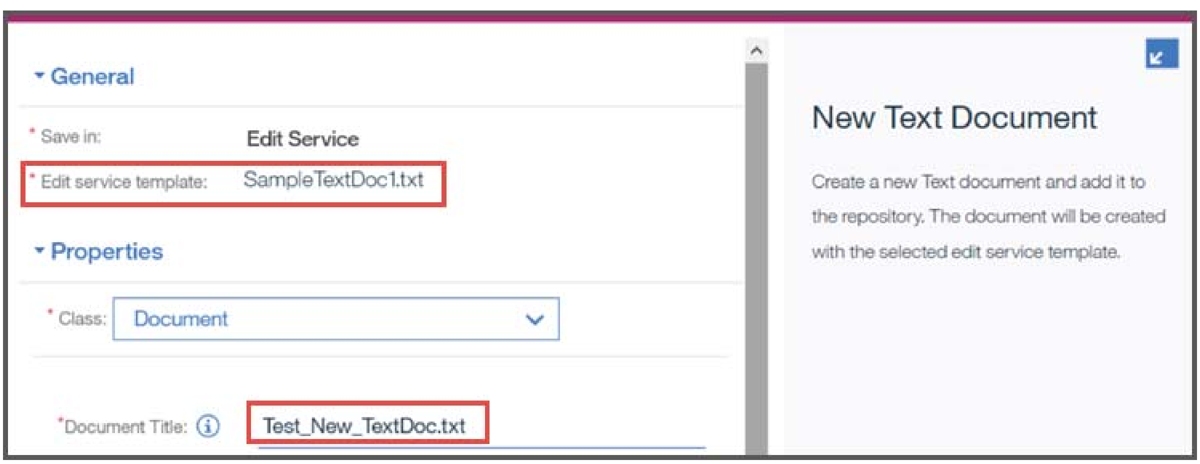
__ 1. In the toolbar, click **New** > **Text Document**.



The **New Text Document** page opens.

__ 2. Notice that the template: **SampleTextDoc1.txt** that you defined is automatically selected.

__ 3. Change the **Document Title** value to `Test_New_TextDoc.txt` so it is different from the template name.



__ 4. Click **Add** and notice the status message: `Downloading document Test_New_TextDoc.txt`.

This action opens the document in Notepad++ in Notepad++ in the background. The document contains the text that was in the template.

__ 5. In Notepad++, edit the document to add some new text and save the file.

__ 6. Notice the status message: `Document Test_New_TextDoc.txt is being checked into the repository`.

__ 7. Close the file.

__ 8. On **Sample Desktop**, click **Refresh** and verify that the new document has **Major version**: **1**

The document has checked out icon.

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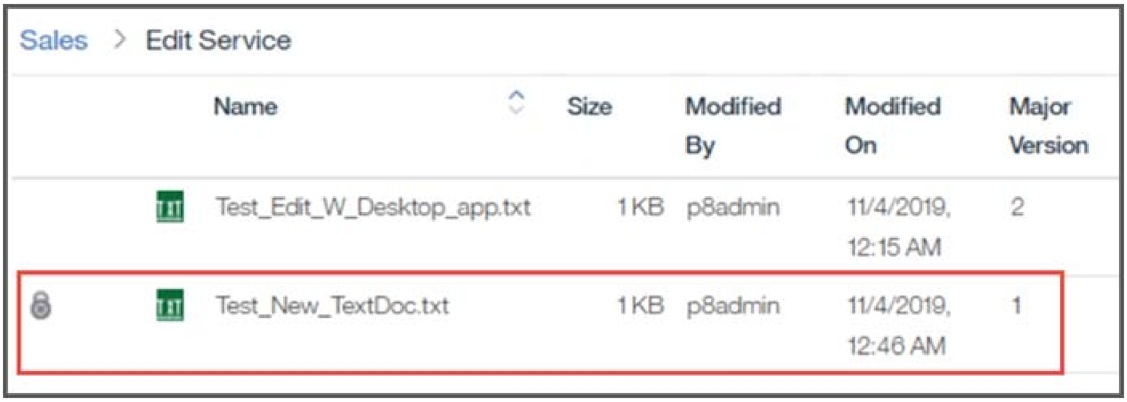


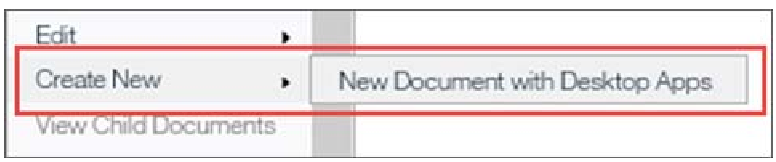
__ 9. Right-click **Test_New_TextDoc.txt** and click **Cancel Check Out**.

__ 10. Leave the IBM Content Navigator **Sample Desktop** open for the next section.

2.3. Verify the New Document with Desktop Apps action

In this section, you create a document that is based on the original document that you select.

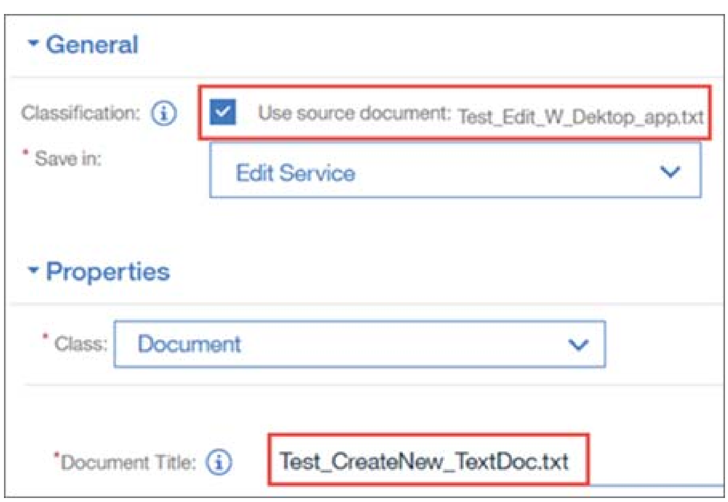
__ 1. In the **Edit Service** folder, right-click **Test_Edit_W_Desktop_app** and click **Create New** > **New Document with Desktop Apps**.



The **New Document** page opens.

__ 2. For **Classification**, select **Use source document: Test_Edit_W_Desktop_app.txt**.

__ 3. Change **Document Title** to **Test_CreateNew_TextDoc.txt** so it is different from the original document name.



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__ 4. Click **Add** and notice the status message: `Downloading document Test_CreateNew_TextDoc.txt`

This action opens the document in Notepad++ in the background. The document contains the text that was in the original document, which was used to create this document.

__ 5. In Notepad++, edit the document to add some new text and save the file.

__ 6. Notice the status message: `Document Test_CreateNew_TextDoc.txt is being checked into the repository`.

__ 7. Close the file and exit Notepad++.

__ 8. On **Sample Desktop**, click **Refresh** and verify that the new document has **Major version**: **1**

__ 9. Right-click **Test_CreateNew_TextDoc.txt** and select **Cancel Check Out**.

__ 10. Log out of the IBM Content Navigator **Sample Desktop** and close the browser.

End of exercise

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Exercise 8. Configuring and managing external share

Estimated time

01:30

Overview

In this exercise, you learn how to configure external share and share the repository content in a secured manner with users from an external organization.

Objectives

After completing this exercise, you should be able to:

- Configure external share in IBM Content Navigator
- Share contents and manage shares as an internal user
- Accept shares and view, download, and edit the shared documents as an external user

Introduction

In this exercise, you register the share plug-in and configure external sharing on a repository. You also configure the internal desktop for external sharing and create a menu. You test the Share capability in IBM Content Navigator by sharing the repository content securely with users from an external organization.

This exercise includes the following sections:

Requirements

The activities in this exercise assume that you have access to the student system that is configured for these activities and all components are running when you begin an exercise.

The student system is already configured for external share. For your reference, details are provided in Appendix A, "External share requirements," on page A-1.

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Section 1. Configure share plug-in, a repository, and a desktop

In this section, you install the share plug-in that is provided with the IBM Content Navigator installation. You configure a FileNet Content Manager repository, and a desktop in IBM Content Navigator for external share.

Important

Before you begin the exercises, ensure that the components are running. If you did not start the components already, refer to Section 1, "Prepare your system: Start the components," on page 1-3 to start them.

1.1. Register the share plug-in

__ 1. Start the IBM Content Navigator administration tool.

__ a. Open the Firefox browser and click the **ICN Admin** shortcut. Or go to the **URL**: `http://ecmedu01:9081/navigator/?desktop=admin`

__ b. Enter the following credentials:

- **User name**: `p8admin`
- **Password**: `FileNet1`

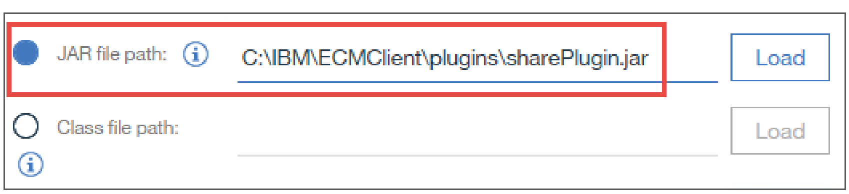
__ c. Click **Log in**.

__ 2. In the left pane, click **Plug-ins**.

__ 3. In the **Plug-ins** tab, click **New plug-in**.

__ 4. On the **New Plug-in** page, for **JAR file path**, enter the plug-in location:

`C:\IBM\ECMClient\plugins\sharePlugin.jar`



__ 5. Click **Load**.

If the file path is valid, the page shows more information as defined for the plug-in.

__ 6. Click **Save** and verify that the configuration fields are shown.

You must save the plug-in before you can configure the external share on a repository.

__ 7. Scroll down to the **REST API URL** field, enter: `/contentapi/rest/share/v1`

__ 8. Click **Verify** to ensure that the Share REST service is available.

The message **Verified** is shown.

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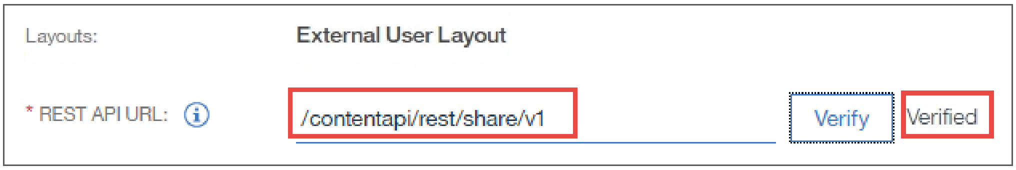
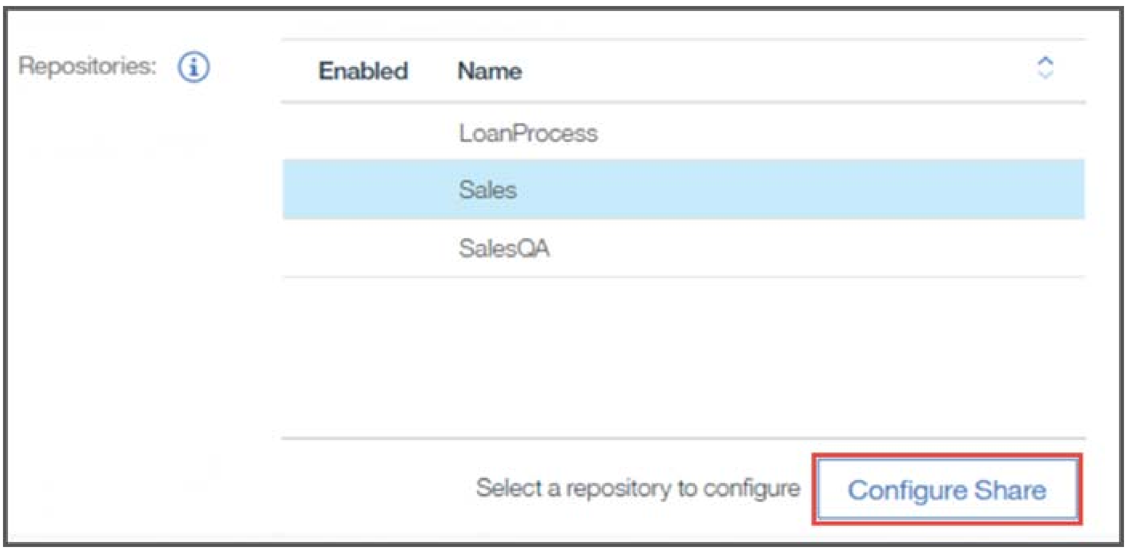


__ 9. Leave the IBM Content Navigator administration tool open for the next section.

1.2. Configure external share on a repository

__ 1. Scroll down to **Repositories**, click **Sales** and click **Configure Share**.



__ 2. On the **Configure Share for Sales** page, verify that the external directory: **EXT_ADAM** is automatically selected.

__ 3. For **External URL**, if there is no value, type the base URL for IBM Content Navigator: `http://ecmedu01:9081/navigator/`

__ 4. Select **New Desktop**.

Information

You can also specify an existing external desktop ID. An existing desktop must:

- Belong to the IBM Content Navigator instance that the External URL points to in step 2.
- Be associated with only one repository
- Be enabled for the Share feature
- Be associated with External User Layout
- Include Default Share plug-in banner tools context menu

When you select **New Desktop**, a desktop with all the required components is created. You verify the features for the new desktop in the following section.

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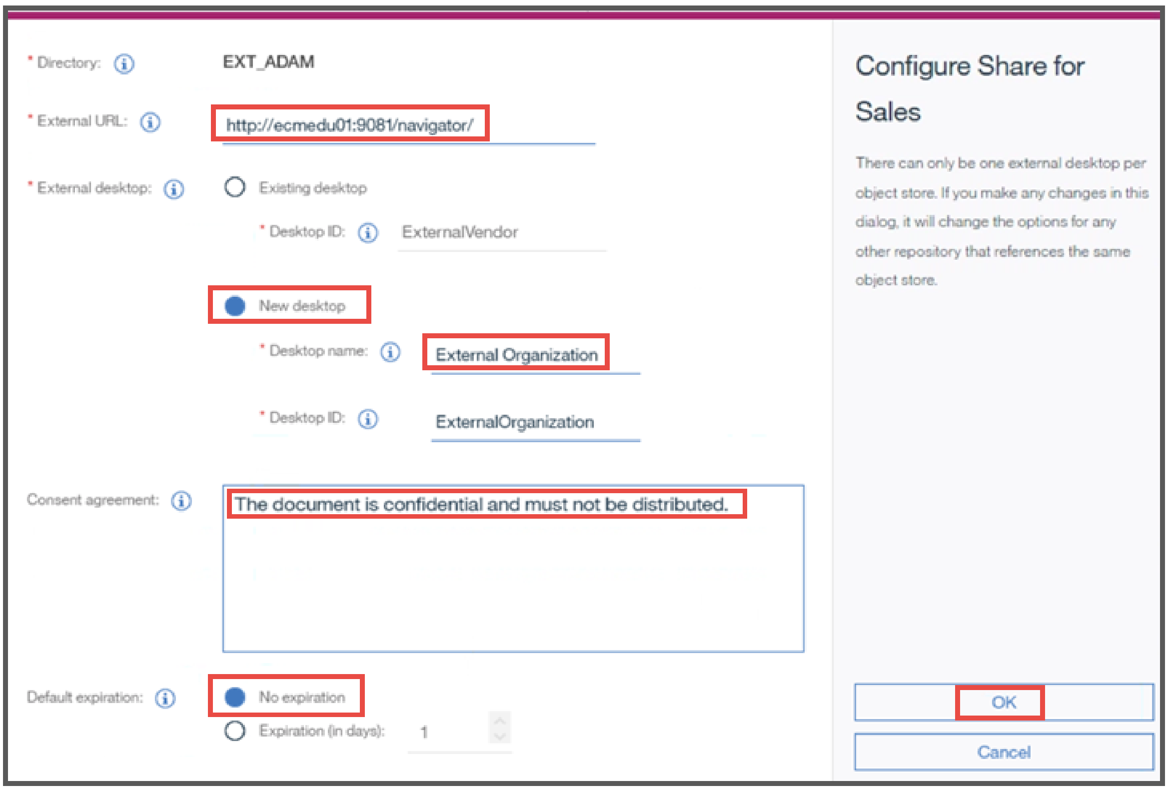
__ 5. For **Desktop name**, type: `External Organization`

The desktop ID is automatically populated.

__ 6. For **Consent agreement**, if there is no value, type the text: `The document is confidential and must not be distributed.`

The text can be a message, or a confidentiality statement to be shown to the users when they accept pending shares.

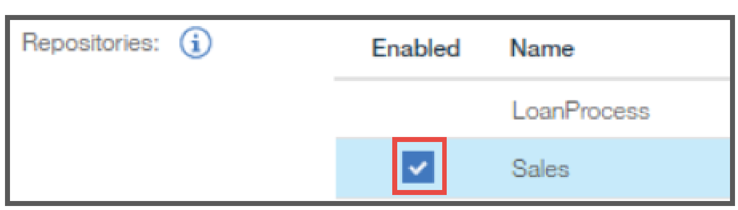
__ 7. For **Default expiration**, leave the default value: **No expiration**



__ 8. Click **OK**.

__ 9. On the **Share** tab, for **Sales**, verify that the **Enabled** column shows a blue tick mark icon.

It indicates that this repository is enabled for external share.



__ 10. Click **Save and Close.**

__ 11. On the **Plug-ins** tab, click **Refresh** and verify that the **Share** plug-in is listed.

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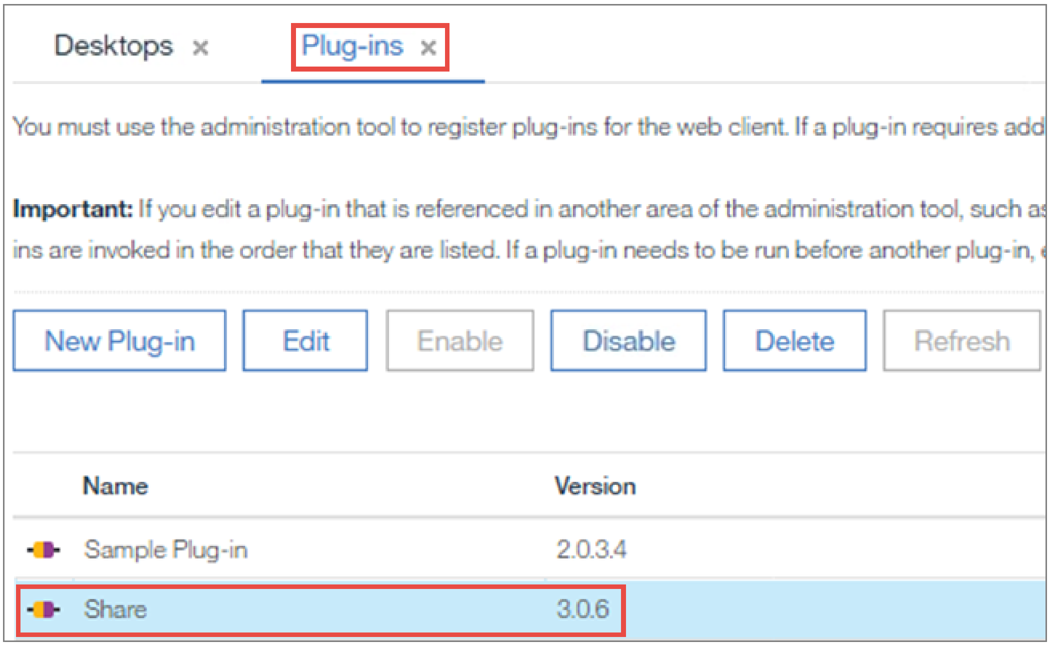
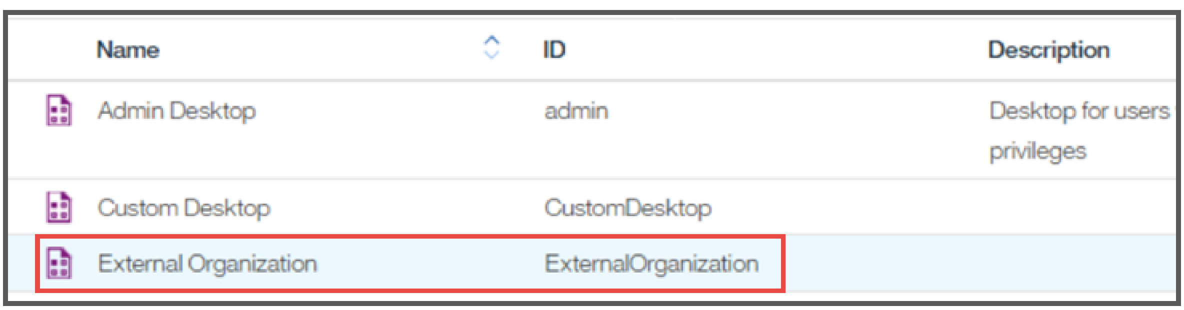


__ 12. Close the **Plug-ins** tab.

__ 13. On the **Desktops** tab, click **Refresh** and verify that the desktop: **External Organization** is listed.



When you configured the plug-in the desktop is created automatically.

__ 14. Leave the IBM Content Navigator administration tool open for the next section.

1.3. Verify the desktop for external share

In this section, you verify the external share desktop that was created and edit it.

__ 1. Select **External Organization** and click **Edit**.

__ 2. On the **External Organization** > **General** subtab, in the **Authentication** section, verify that the **Sales** repository is selected.

__ 3. Click the **Repositories** subtab.

__ 4. Verify that the **Selected Repositories** pane has one repository: **Sales** that you specified in the plug-in configuration.

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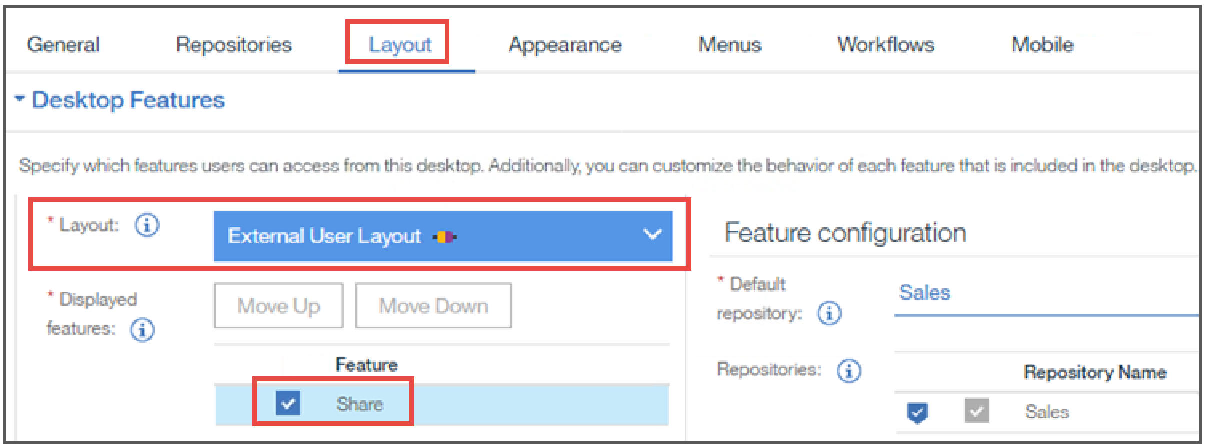
You must not associate more than one repository to the external share desktop.

__ 5. Click the **Layout** subtab.

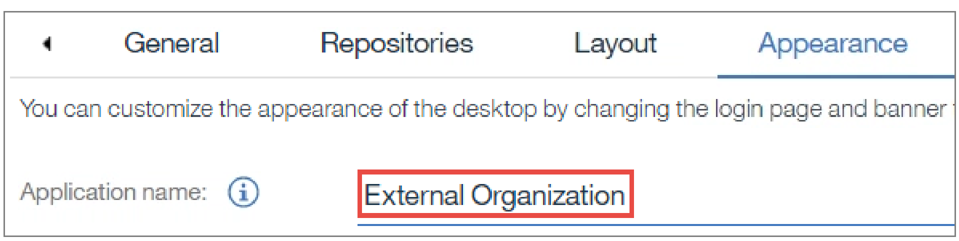
__ 6. In the **Desktop Features** section, for **Layout**, notice that **External User Layout** is selected.

__ 7. For **Displayed features**, verify that only **Share** is selected.

The **External User Layout** excludes core features such as **Browse** and **Search** that external users must not use.

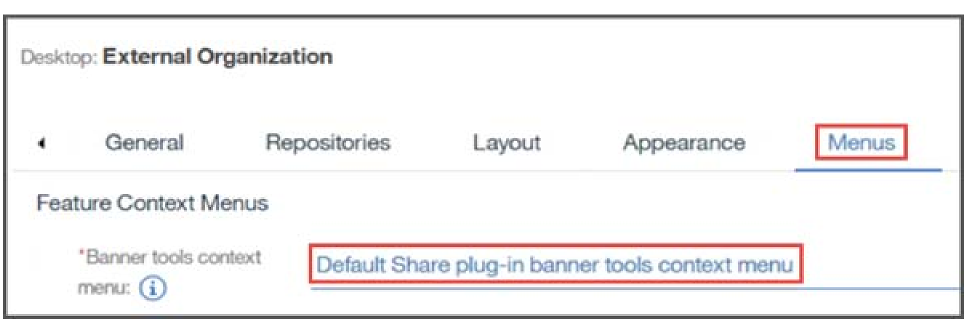


__ 8. Click the **Appearance** subtab and for **Application name**, enter: `External Organization`



__ 9. Click the **Menus** subtab and scroll down to **Feature Context Menus**.

__ 10. For **Banner tools context menu**, verify that **Default Share plug-in banner tools context menu** is selected.



__ 11. Click **Save and Close**.

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__ 12. Leave the IBM Content Navigator administration tool open for the next section.

1.4. Create a menu for the internal desktop for share

In this section, you configure the menus for the Share action.

__ 1. Click **Menus** from the left pane.

__ 2. Copy an existing menu: **Default document context menu**

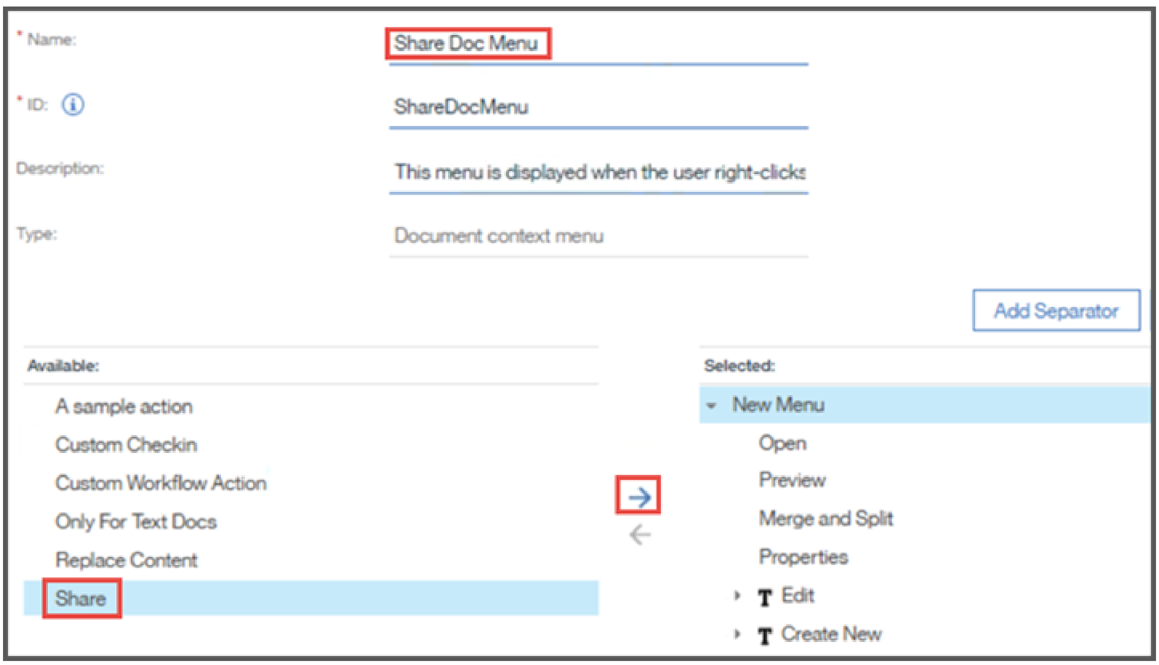
__ a. On the **Menus** tab, in the **Name contains** search field, type: `Default document`

__ b. Select **Default document context menu** and click **Copy**.

__ 3. Create a custom menu: **Share Doc Menu**

__ a. On the **New Menu** tab, for **Name**, enter: `Share Doc Menu`

__ b. In the **Available** pane, move **Share** to the **Selected** pane.



Hint

If the entire menu page is not shown, use the Zoom feature in the browser. Click View > Zoom > Zoom Out

__ 4. Click **Save and Close**.

__ 5. Repeat the steps and use the following values to configure **Default folder context menu**.

- Default menu to copy: **Default folder context menu**
- Name: **Share Folder Menu**

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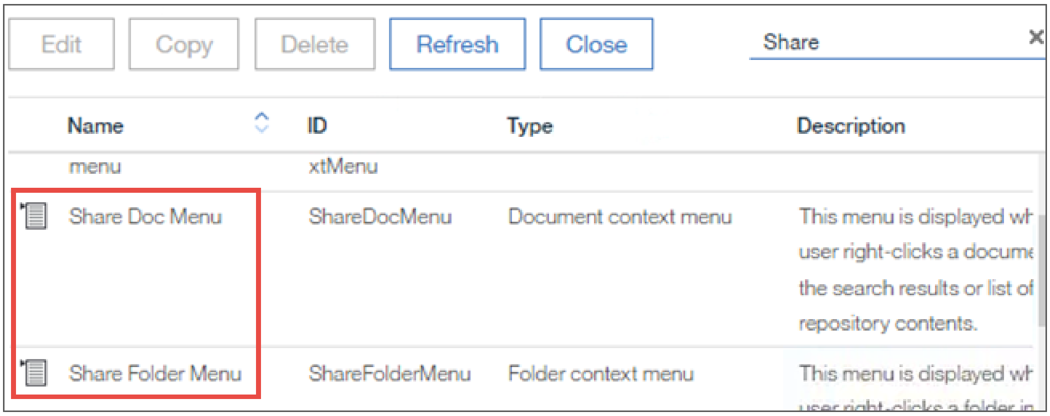
__ 6. On the **Menus** tab, search for: `Share` and verify that **Share Doc Menu** and **Share Folder Menu** are listed.



__ 7. Click **Close** on the **Menus** tab.

__ 8. Leave the IBM Content Navigator administration tool open for the next section.

1.5. Configure the internal desktop for share

In this section, you configure the internal desktop that is used for share. You add the Share feature and Share-specific menus that you configured in the previous section.

__ 1. On the **Desktops** tab, select **Sample Desktop** and click **Edit**.

The Sample Desktop is associated with the **Sales** repository that is enabled for **Share**.

__ 2. On the **Sample Desktop** tab, click the **Layout** subtab.

__ a. In the **Desktop Features** > **Displayed features** section, select the **Share** feature.

You cannot add the Share feature to a desktop unless the desktop includes a repository that is configured for Share.

__ b. On the right pane, verify that **Sales** is automatically selected.

__ c. Click **Save** and then click **Close** on **Information** when you are prompted to refresh the browser.

__ 3. Click the **Menus** subtab.

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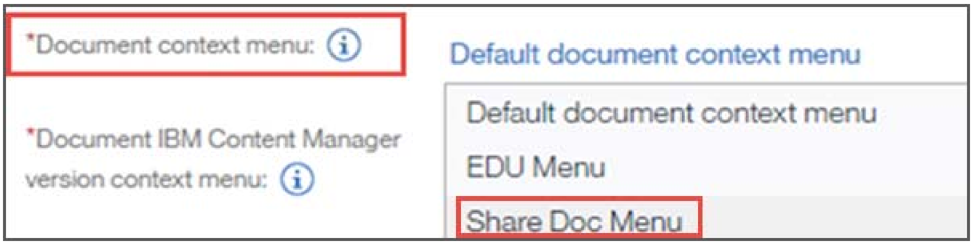
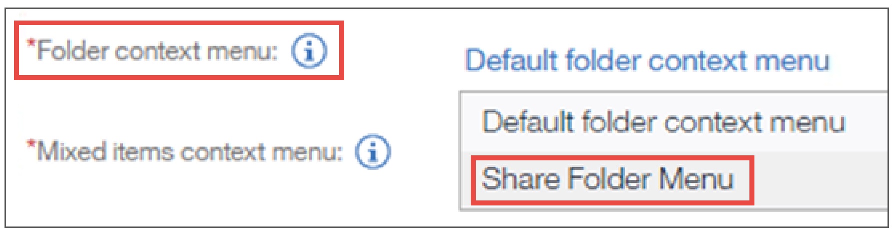
__ 4. In the **Context Menus** > **Content Context Menus** section, for **Document context menu**, set: **Share Doc Menu**



This step adds the **Share** action to the Document context menu.

__ 5. In the **Context Menus** > **Content Context Menus** section, scroll down to **Folder context menu** and set: **Share Folder Menu**



__ 6. Click **Save and Close**.

__ 7. If you are prompted to refresh the browser, click **Close**.

__ 8. Log out of the IBM Content Navigator administration tool and close the browser.

Information

You can repeat the steps to add the Share action to other context menus, such as the Default teamspace content list context menu or the Default attachments document context menu.

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Section 2. Share documents with external users

In this section, as an internal user, you share the documents and manage the shared documents in IBM Content Navigator. You also log into IBM Content Navigator as an external user, accept the shares, and view and download the documents.

2.1. Share documents as an internal user

In this section, you use the Share action to share one or more documents.

__ 1. Log in to the IBM Content Navigator **Sample Desktop**.

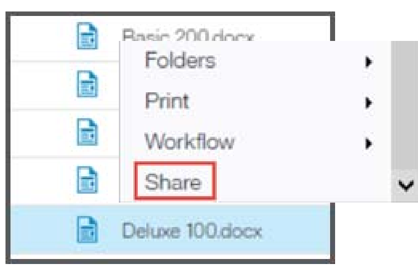
- The **Sample Desktop** shortcut or **URL**: `http://ecmedu01:9081/navigator/?desktop=SampleDesktop`
- **User name**: `p8admin`
- **Password**: `FileNet1`

__ 2. On the **Browse** view, click the **Sales** > **Products** folder from the left pane.

__ 3. Right-click **Deluxe 100.docx** and select **Share**.

Hint

If the complete GUI is not shown, use the browser's zoom feature: click View > Zoom > Zoom Out from the Firefox browser menu



__ 4. On the **Share** page, enter the following data.

- **To**: `Eric@ext.org`, `Extadmin@ext.org`

  As you type the recipient emails, type-ahead suggestions are shown.

  A second LDAP is configured for the external users on the student system.

- **Subject**: `Product information for editing`
- **Message**: `Please find the attached document per our discussion.`

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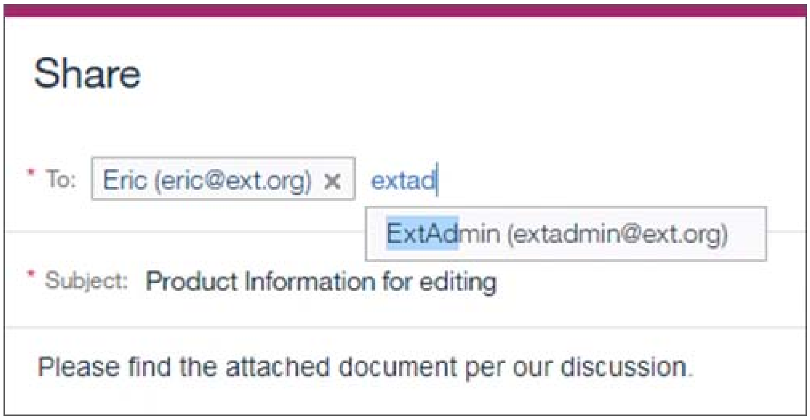
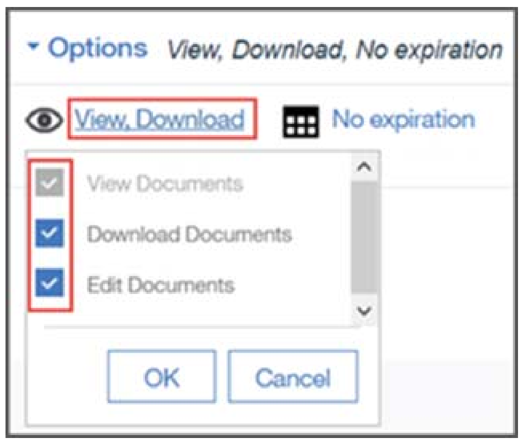


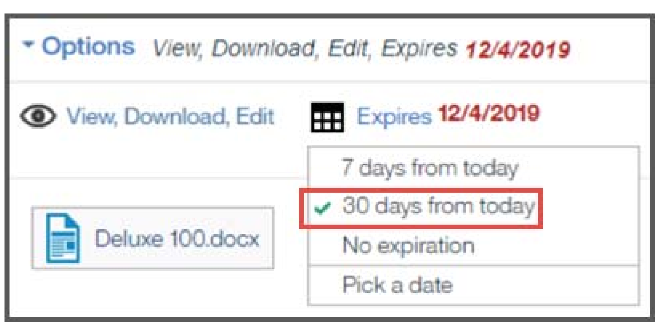
__ 5. Expand **Options** and click the **View**, **Download** link that is next to the eye icon.

__ 6. Select all three items: **View Documents**, **Download Documents**, and **Edit Documents**



__ 7. Click **OK**.

__ 8. Click the **No expiration** link and select **30 days from today** from the list.



__ 9. Notice that **Deluxe 100.docx** is added as an attachment to the email.

__ 10. Click **Send** to send the email to the external user recipients.

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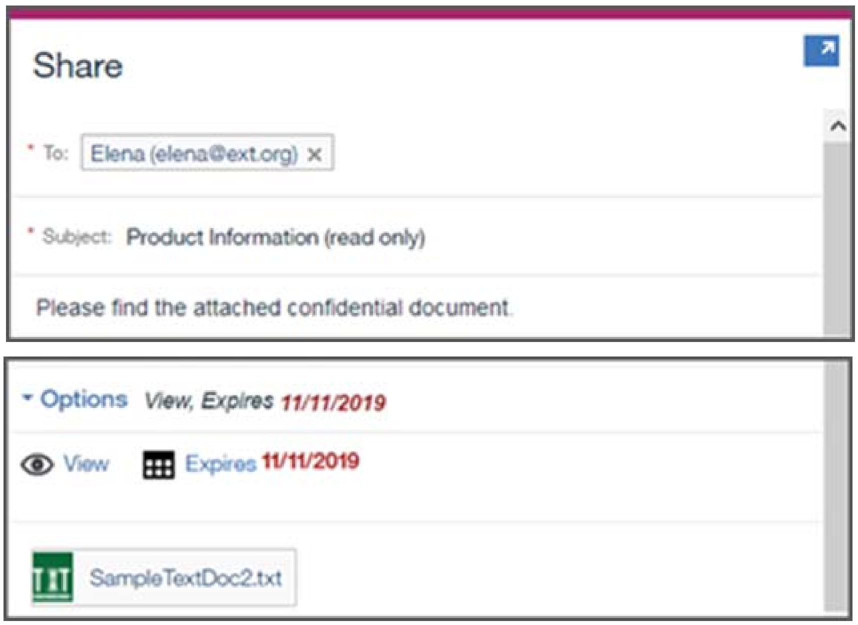
__ 11. Repeat steps 2- 10 to share **SampleTextDoc2.txt** from the **SampleDocs** folder with following options:

- **To**: `Elena@ext.org`
- **Subject**: `Product information (read only)`
- **Message**: `Please find the attached confidential document.`
- **Options**: **View** permission, with **7 days from today** expiration.



__ 12. Repeat steps 2- 10 to share **Basic 100.docx** from the **Products** folder with following options:

- **To**: `Elena@ext.org, Eric@ext.org`
- **Subject**: `Product Details`
- **Message**: `Confidential document.`
- **Options**: **View, Download** permission, with **No expiration**

__ 13. Repeat steps 2- 8 to share the **Pictures** folder with following options:

- **To**: `Elena@ext.org, Eric@ext.org`
- **Subject**: `Marketing materials`
- **Message**: `Use these updated docs.`
- Options: **View** and **Download** permission, with **No expiration**

__ 14. Leave IBM Content Navigator **Sample Desktop** open for the next section.

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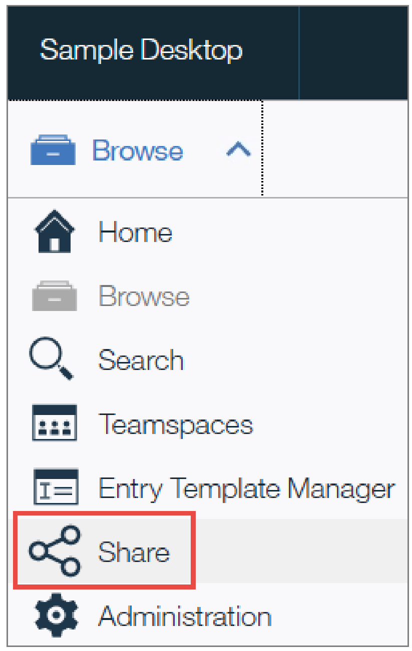
2.2. Manage shares as an internal user

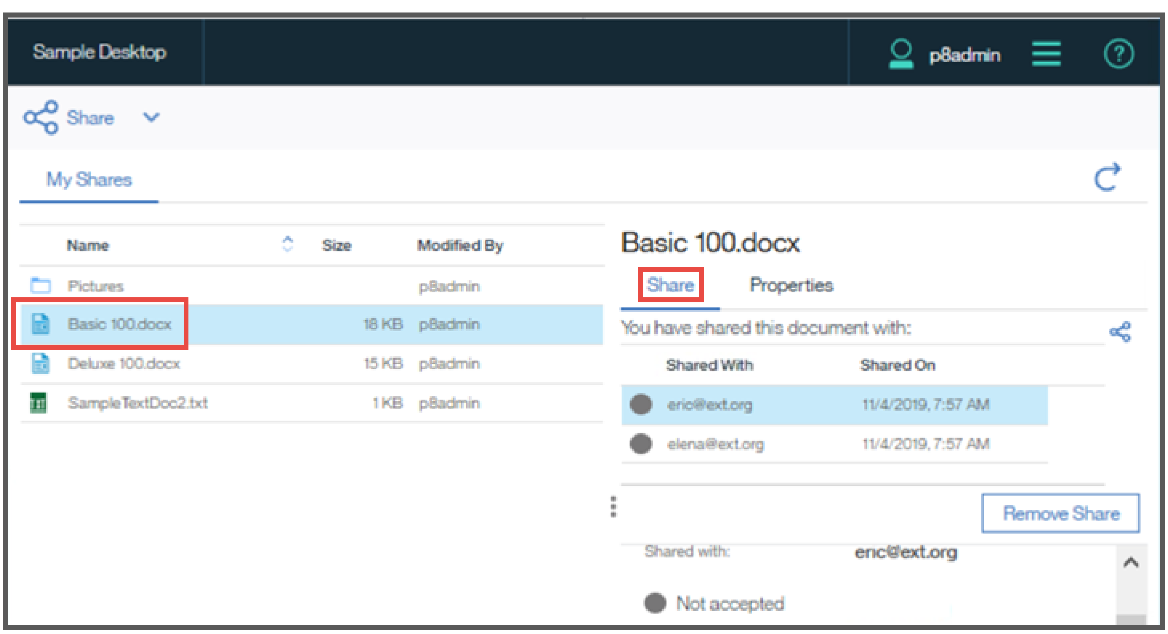
After you send emails to share the documents with external users, you can view the details and make changes to what you shares. In this section, you, as an internal user, view your shares in IBM Content Navigator and make changes.

__ 1. On IBM Content Navigator **Sample Desktop**, switch from the **Browse** view to **Share**.



__ 2. On the **Share** view, in the **My Shares** tab, verify that all the documents and the folders that you shared are listed.

__ 3. Select **Basic 100.docx**.



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__ 4. Verify the following information about the share on the right pane on the **Share** tab.

- A list of external users with whom you shared the document
- The date on which you shared
- An option to remove the share

__ 5. Select **eric@ext.org** to view share details on the lower right pane.

__ 6. Notice that you can edit the privileges that you granted earlier and change the expiration date.

__ 7. Notice that the item has a flag: **Not accepted**

This flag is changed after the external user accepts the share.

__ 8. Remove a share:

__ a. In the **Name** column, select **Basic 100.docx**.

__ b. In the **Shared With** column, select **eric@ext.org**

__ c. Click **Remove Share**.

__ d. When you are prompted with a message to confirm, click **Remove**.

__ e. Repeat the steps to remove **elena@ext.org**

__ f. In **My Shares**, verify that the item is removed.

This document is no longer shared with the external user.

If you shared the document with multiple users, you must select each user and remove the share.

__ 9. Log out of IBM Content Navigator **Sample Desktop** and close the browser.

2.3. Accept shares as an external user

External users receive an email when an internal user shares a document. The user clicks the **Accept Share** link in the email and it opens the external IBM Content Navigator desktop for share. When the user logs in to the desktop, the share is auto-accepted and the shared documents are listed. Users can also accept the shared documents and folders directly on the external IBM Content Navigator desktop.

The student system is configured with a mail server but not with a mail client. You check and accept the share directly on the external desktop.

__ 1. Log in to the IBM Content Navigator external desktop: **External Organization**

- **URL**: `http://ecmedu01:9081/navigator/?desktop=ExternalOrganization`
- **User name**: `Eric`
- **Password**: `FileNet1`

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Hint

Create a browser shortcut for the **External Organization** desktop to use it for the following steps.

__ 2. Notice that this desktop does not contain the **Browse**, **Search** or any other features that you used in an internal desktop.

The **Shared with Me** tab is empty.

__ 3. Accept the share.

__ a. Click the **Pending Shares** tab and select the item with the subject: **Marketing materials**

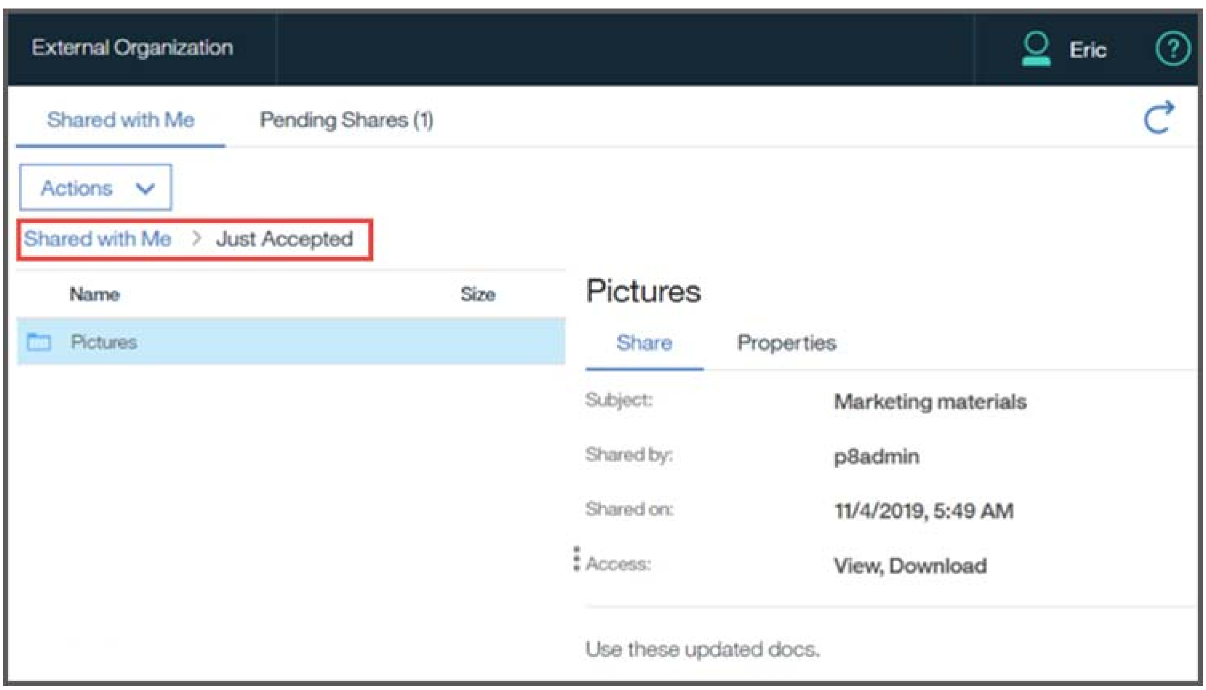
__ b. On the right pane, check the following details: **Shared by**, **Shared on**, and the message

__ c. Click **Accept Share** and verify that the item is no longer listed.

__ 4. View the shared content.

The **Pictures** folder is listed in **Shared with Me** > **Just Accepted**.

__ a. Single-click **Pictures** and view the details on the right pane.



__ b. Double-click **Pictures** and view the list of the documents.

__ c. Single-click **Autumn Tree** and view its properties on the right pane.

__ d. Double-click **Autumn Tree** and view the document content on the viewer.

__ e. Click **X** to close the viewer.

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__ 5. Accept the second share.

__ a. Click the **Pending Shares** tab and select the item with the subject: **Product Information for editing**.

__ b. Click **Accept Share** at the lower right.

__ c. Verify that the **Pending Shares** tab is now empty.

__ 6. Click the **Shared with Me** tab > **Shared with Me** link and verify that both the folder and the document that you shared are listed.

__ 7. Leave the **External Organization** desktop open for the next section.

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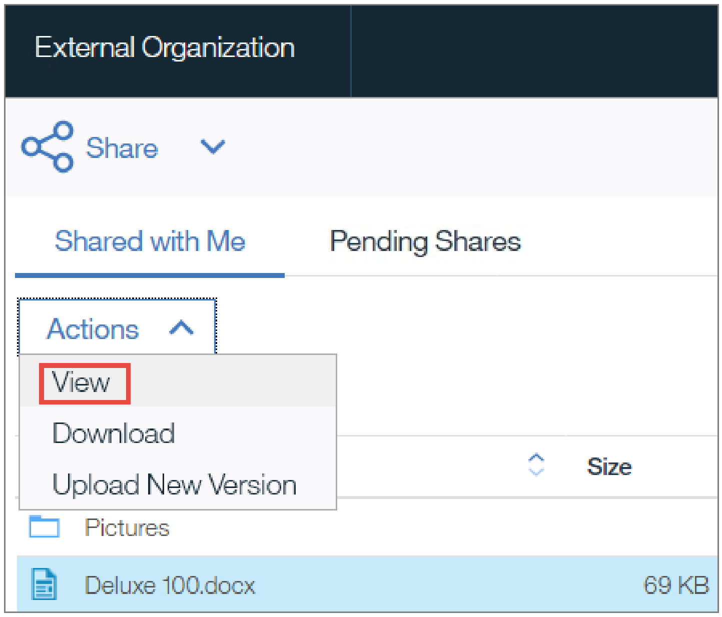
2.4. View and download the shared documents as an external user

__ 1. On the **Shared with Me** tab, select **Deluxe100.docx**.

__ 2. In the **Share** tab on the right, notice that you granted permission to **view**, **download**, and **edit** the document.

__ 3. Click **Actions** > **View**.



The document opens in the viewer.

__ 4. Click **Download**  on the upper right of the viewer.

__ a. When you are prompted, select **Save File** and then click **OK**.

By default, the document is saved in the **Downloads** folder.

__ b. Click **X** to close the viewer.

__ 5. In Windows Explorer > **Downloads** folder, verify that the **Deluxe100.docx** file is downloaded.

__ 6. Leave **Windows Explorer** and the **External Organization** desktop open.

2.5. Edit the shared document as an external user

An external user, with edit permissions, can edit a document and upload it as a new version in IBM Content Navigator.

__ 1. Edit the **Deluxe100.docx** file.

__ a. In the Windows Explorer > **Downloads** folder, double-click **Deluxe100.docx**.

The document opens in **WordPad**.

__ b. Edit the file to add some text: `Eric's edits` in different font color and save it.

This edit helps you identify the new version document.

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If you get a warning: `Some content might be lost`, click **Save**.

__ c. Close the file and exit WordPad.

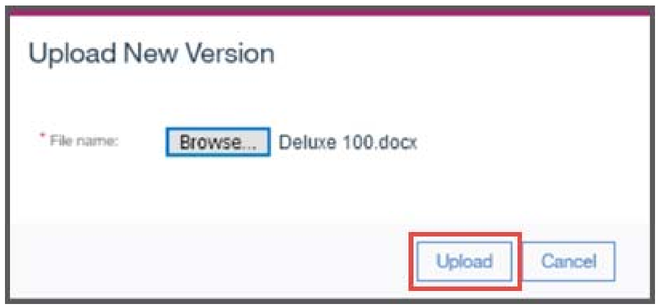
__ 2. Upload the **Deluxe100.docx** file.

__ a. On the **External Organization** desktop > **Share with me** tab, select **Deluxe100.docx**, click **Actions**, and click **Upload New Version**.

__ b. In **Upload New Version**, click **Browse** and navigate to the **Downloads** folder.

__ c. Select **Deluxe100.docx** and click **Open**.

__ d. In **Upload New Version**, verify that **Deluxe100.docx** is listed.



__ e. Click **Upload**.

__ 3. On the **Share with me** tab, verify that **Deluxe100.docx** has **Version**: **2**

__ 4. Optional: Select the document, click **Actions** > **View** and verify the updated content.

__ 5. Log out of the **External Organization** desktop.

2.6. Check the new version of the shared document as an internal user

In this section, you log on to the internal desktop as the internal user. You check the updates the shared document that were made by the external user.

__ 1. Log in to the IBM Content Navigator **Sample Desktop**.

- The **Sample Desktop** shortcut or URL:
  `http://ecmedu01:9081/navigator/?desktop=SampleDesktop`
- **User name**: `p8admin`
- **Password**: `FileNet1`

__ 2. Switch from the **Browse** view to **Share**.

__ 3. Verify that **Deluxe100.docx** has **Major Version**: **2** and **Modified By**: **Eric**

__ 4. Double-click the icon beside **Deluxe100.docx**, select **Open with**, and click **OK**.

__ 5. The document opens in Wordpad.

__ 6. Check the updated content and exit Wordpad.

__ 7. Close the windows and log out of the IBM Content Navigator **Sample Desktop**.

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2.7. Check the view only access for external user

You, as an internal user p8admin, shared the `SampleTextDoc2.txt` document with an external user Elena@ext.org and granted view only permission. In this section, you log in as Elena and check the shared document.

__ 1. Open the Firefox browser and log in to the **External Organization** desktop.

- **URL**: `http://ecmedu01:9081/navigator/?desktop=ExternalOrganization`
- **User name**: `Elena`
- **Password**: `FileNet1`

__ 2. Accept the shares.

__ a. Click the **Pending Shares** tab and verify that **Elena** has two items that p8admin shared.

__ b. Select the item with the subject: **Product Information (read only)**

__ c. On the lower right of the page, click **Accept Share**.

__ 3. View the **SampleTextDoc2.txt** document.

__ a. In **Shared with Me** > **Just Accepted**, single-click **SampleTextDoc2.txt** and verify the **View** only access on the right pane.

__ b. Click **Actions** and verify that only **View** is available.

__ c. Click **View** to open the document in the viewer.

__ 4. Verify that the **Download** icon is not available on the upper right.

__ 5. Close the viewer, log out of the **External Organization** desktop, and close the browser.

End of exercise

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Appendix A. External share requirements

Overview

This appendix provides the steps that were used to configure the student lab environment to support external share. The student system already has this configuration.

Introduction

The following list provides high-level requirements for external share:

- Install an External User LDAP Realm

  This LDAP is in addition to the LDAP that is used for managing internal users of the FileNet Content Manager and IBM Content Navigator environment.

- Configure the LDAP Realm on WebSphere Application Server (where Content Platform Engine and IBM Content Navigator are deployed) to identify external users.

  Content Platform Engine is the main component of the FileNet Content Manager repositories.

- Install and configure a mail server.
- Use the Administration Console for Content Platform Engine (ACCE) to configure the following components for the FileNet Content Manager system:
  - External user directory server
  - Simple Mail Transfer Protocol (SMTP) Server
- Set permissions on the Document class and Folder class of the FileNet Content Manager repositories that are used for the External share.

This appendix includes the following sections:

Appendix A.1, "Install and configure LDAP," on page A-2

Appendix A.2, "Configure LDAP on WebSphere Application Server," on page A-9

Appendix A.3, "Configure Content Platform Engine," on page A-13

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A.1.Install and configure LDAP

This section provides information on the second LDAP setup that is required to authenticate the external users to share the documents from the internal FileNet Content Manager repositories.

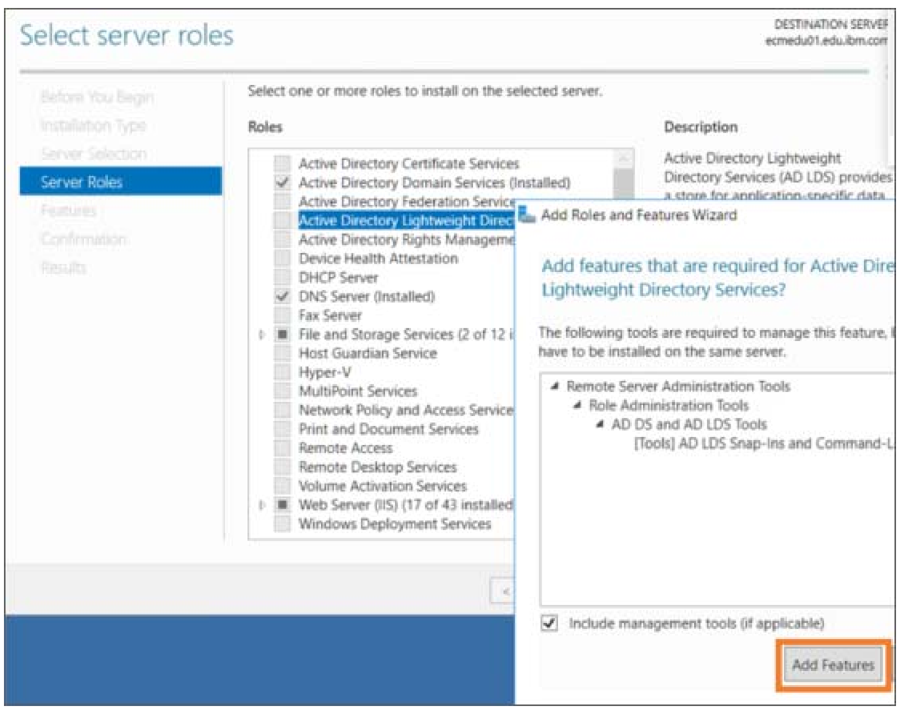
The second LDAP is in addition to the LDAP that is used for managing internal users of the FileNet Content Manager and IBM Content Navigator environment.

A.1.1. Install AD LDS

__ 1. Open the Windows **Server Manager**.

__ 2. In the **Server Manager,** click **Manage** > **Add Roles and Features**.

__ 3. Click **Next** a few times, and on the **Select server roles** page, click **Active Directory Lightweight Directory Services**.



__ 4. Click **Add features** and click **Next** a couple times. Leave the default values.

__ 5. Click **Install**.

__ 6. After the Installation complete, click **Close**.

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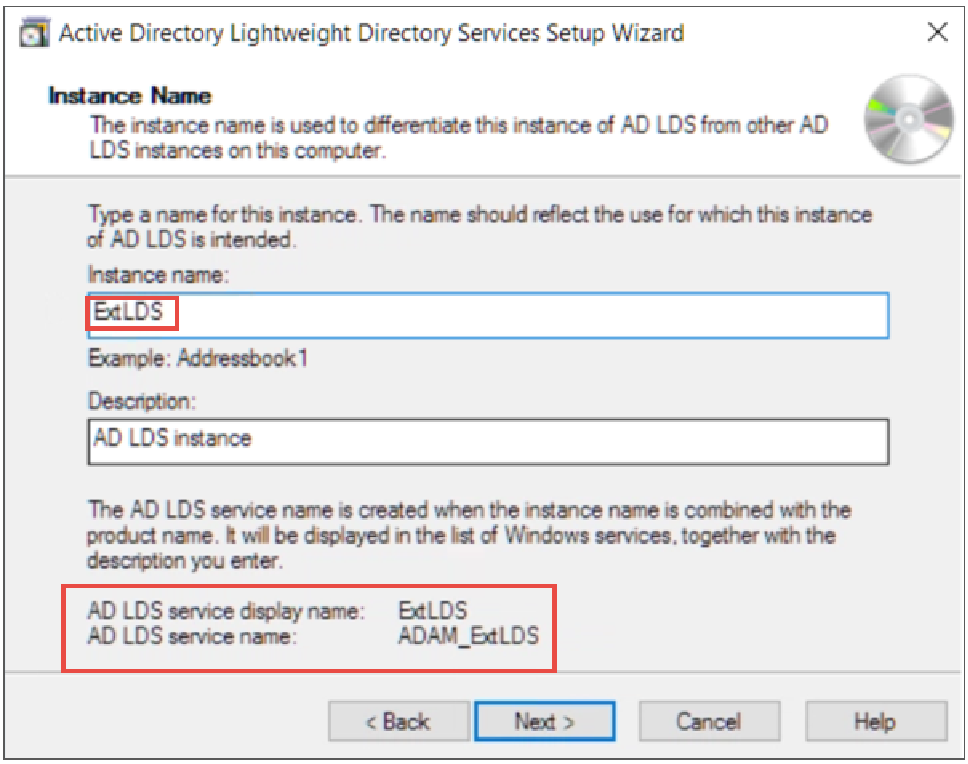
A.1.2. Set up Active Directory Lightweight Directory Services (AD LDS)

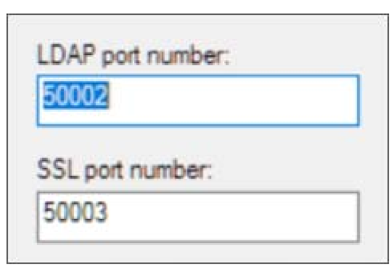
__ 1. In the **Server Manager**, click **Tools > Active Directory Lightweight Directory Services Setup Wizard** from the top of the page.

__ 2. On the wizard, select the **A unique instance** option.

__ 3. For the **Instance Name** field, click **Next** and enter: `ExtLDS`



__ 4. Click **Next** and leave the default values for the port numbers.



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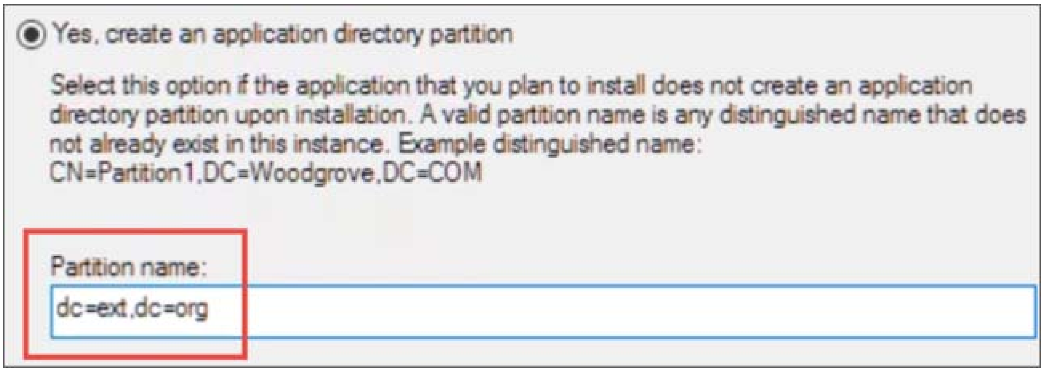
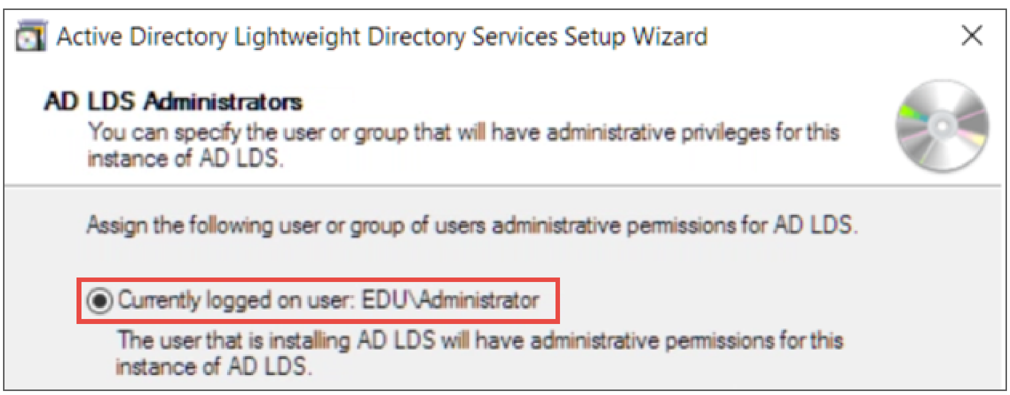
__ 5. Click **Next** and for the **Partition name** field, enter: `dc=ext, dc=org`



__ 6. Click **Next** until you get to the AD LDS Administrators page.

__ 7. For **AD LDS Administrators**, select **Currently logged on user: EDU\Administrator**.



__ 8. On the **Importing LDIF** files page, select all the options and click **Next**.

__ 9. On the **Summary** page, and click to complete.

A.1.3. Configure in ADSI Edit

__ 1. In the **Server Manager**, click **Tools > ADSI Edit**.

__ 2. On the **ADSI Edit** page, from the left pane, right-click **ADSI Edit** and select **Connect to**.

__ 3. On the **Connection Settings** page, complete the fields:

- **Name**: `dc=ext, dc=org`
- **Select a Distinguished name**: `dc=ext, dc=org`
- **Select a domain or server**: `ecmedu01.edu.ibm.com:50002`

__ 4. Click **Advanced**.

__ 5. On the **Advanced** page, for **User**, enter `EDU\ADMINISTRATOR` and for **Password**, enter `FileNet1`.

__ 6. Click **OK**.

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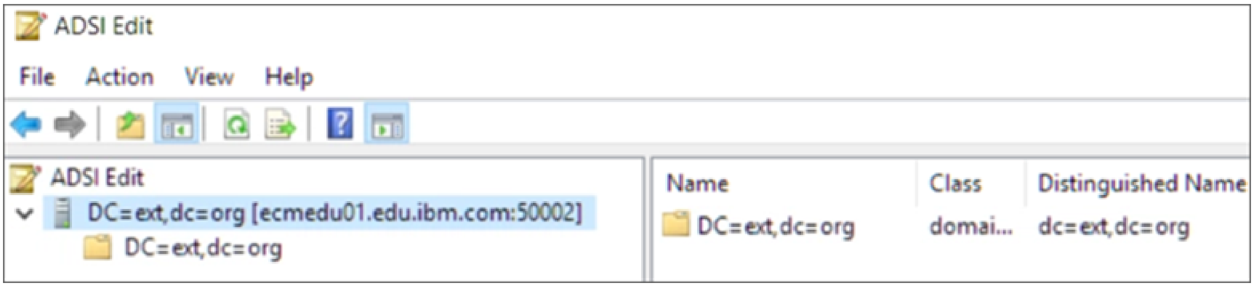
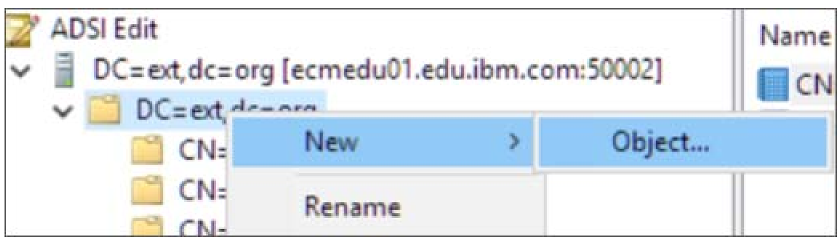
__ 7. On the **ADSI Edit** page, check that the values are shown correctly.



A.1.4. Create organizational units

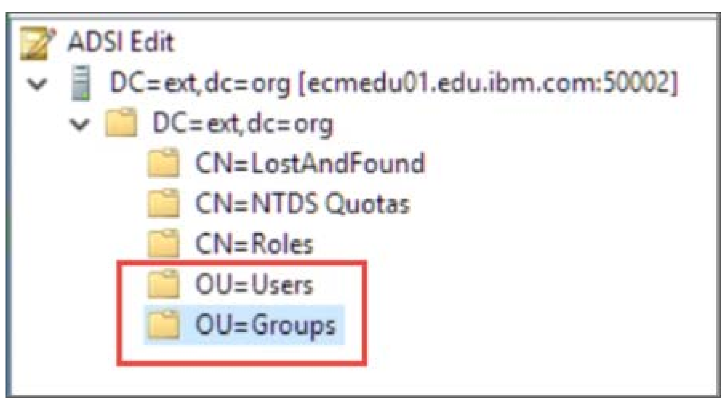
__ 1. In **ADSI Edit**, select your domain and click **New** > **Object**.



__ 2. In the **Create Object** window, select **Organization Unit** (**OU**) and click **Next**.

__ 3. For the **Value** field, enter `Groups` and click **Finish**.

__ 4. Repeat the steps to create an **OU** called **Users**.



A.1.5. Create users and groups

__ 1. Right-click **OU=Groups**, select **New** > **Object**.

__ 2. On the **select a class** window, select **group** and click **Next**.

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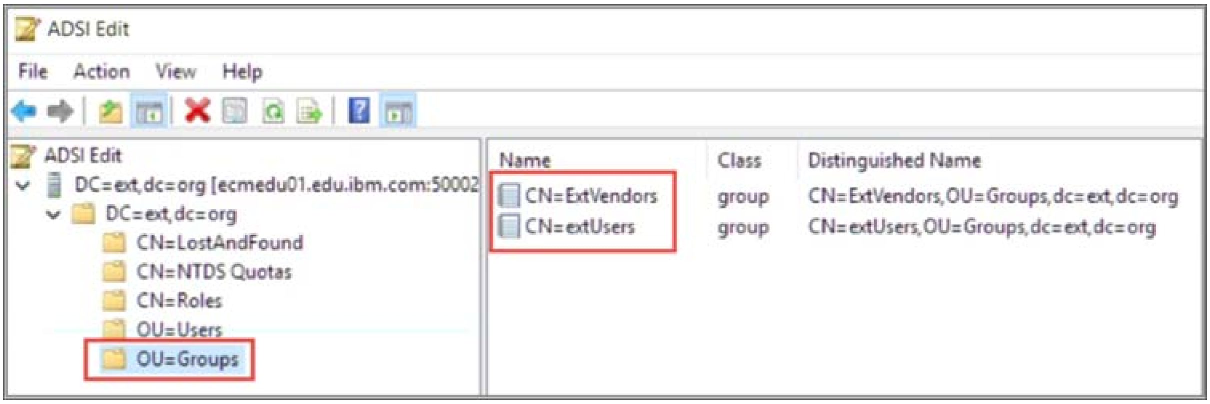
__ 3. For the **Value** field, enter `ExtVendors` and click **Next**.

__ 4. Click **Finish** and verify that the group is listed.

__ 5. Repeat the steps to create a group that is called **extUsers**.



__ 6. Repeat the steps to create users:

- User names: `ExtAdmin`, `Eric`, and `Elena`
- For the **select a class** page, select **Users**
- **Distinguished Name**: `CN= ExtAdmin,OU=Users,DC=ext,DC=org`

__ 7. Right-click **ExtAdmin**, click **Reset Password** from the list.

__ 8. On the **Reset Password** window, for the password, type `FileNet1` and click **OK**.

__ 9. Right-click the **ExtAdmin** user, click **Properties** from the list.

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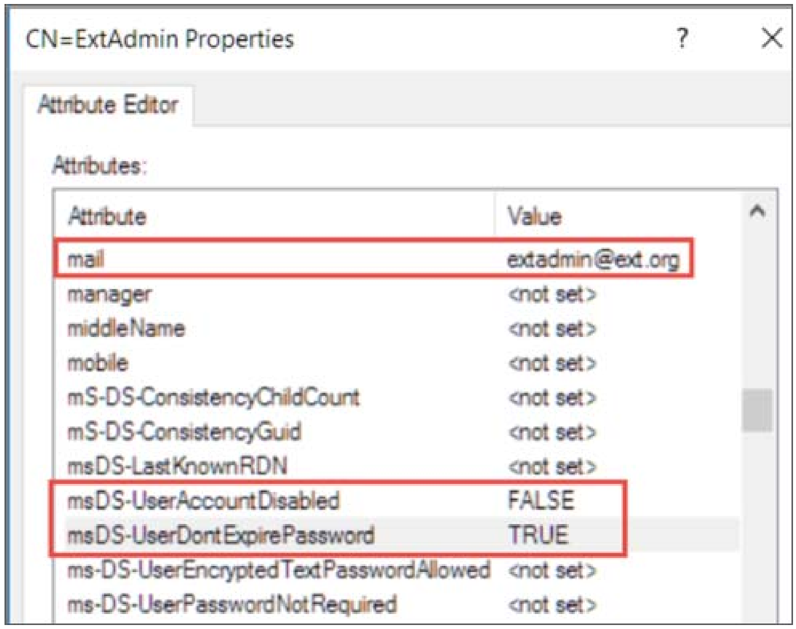
__ 10. On the **Attribute Editor** window, set the following values:

- **Mail:extadmin@ext.org**
- **msDS-UserAccountDisabled: FALSE**
- **msDS-UserDontExpirePassword: TRUE**



A.1.6. Add users to the groups

__ 1. In **ADSI Edit**, on the left pane, select **OU=Groups**.

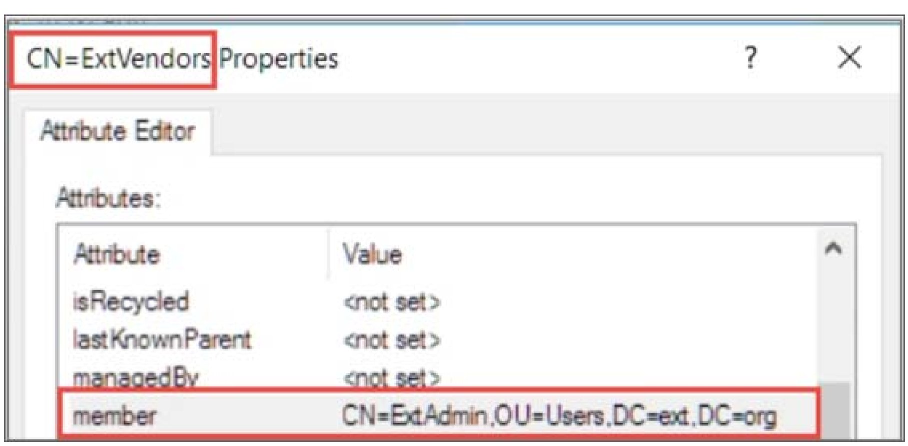
__ 2. On the right pane, right-click **ExtVendors** and select **Properties**.

__ 3. On the **Properties** page, select **member** and click **Edit**.

__ 4. On the **Multi-valued** page, click **Add DN**.

__ 5. Type `CN=ExtAdmin,OU=Users,DC=ext,DC=org` and click **OK**.

You can add more than one user on this page.



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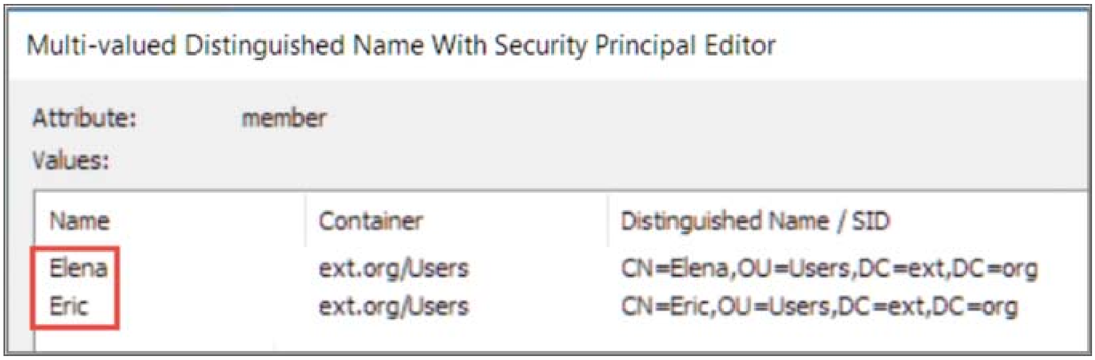
__ 6. Repeat the steps to add **Eric** and **Elena** to the **extUsers** group.



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A.2. Configure LDAP on WebSphere Application Server

A.2.1. Test the connection to the ADAM directory

__ 1. Log in to WebSphere Application Server (WAS) administration console.

- **URL**: `https://ecmedu01:9043/ibm/console`
- **User name**: `wasadmin`
- **Password**: `FileNet1`

__ 2. From the left pane, click **Security** > **Global Security**.

__ 3. On the right pane, scroll to **Federated Repositories** and click **Configure**.

__ 4. Scroll and click **edu-ldap** link from the table.

You use an existing repository as a starting point and edit the values for the test.

__ 5. Scroll to the **Related Items** section, and click the **LDAP Test Query** link.

__ 6. In the **LDAP test Query**, enter the following values:

- **Port:** `50002`
- **Base Distinguished name:** `dc=ext,dc=org`
- **Base Distinguished name:** `cn=Extadmin,ou=users,dc=ext,dc=org`
- **Binding password:** `FileNet1` **Test Query field:** `cn=Extadmin`

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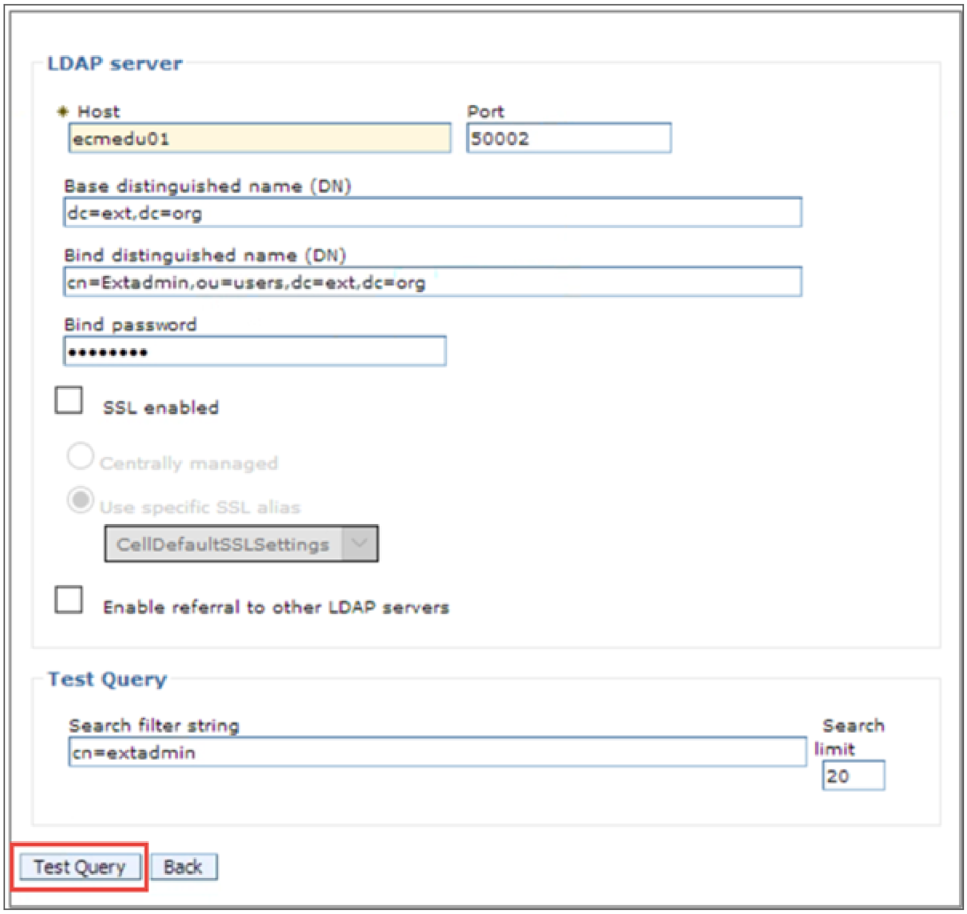
__ 7. Click **Test Query**.



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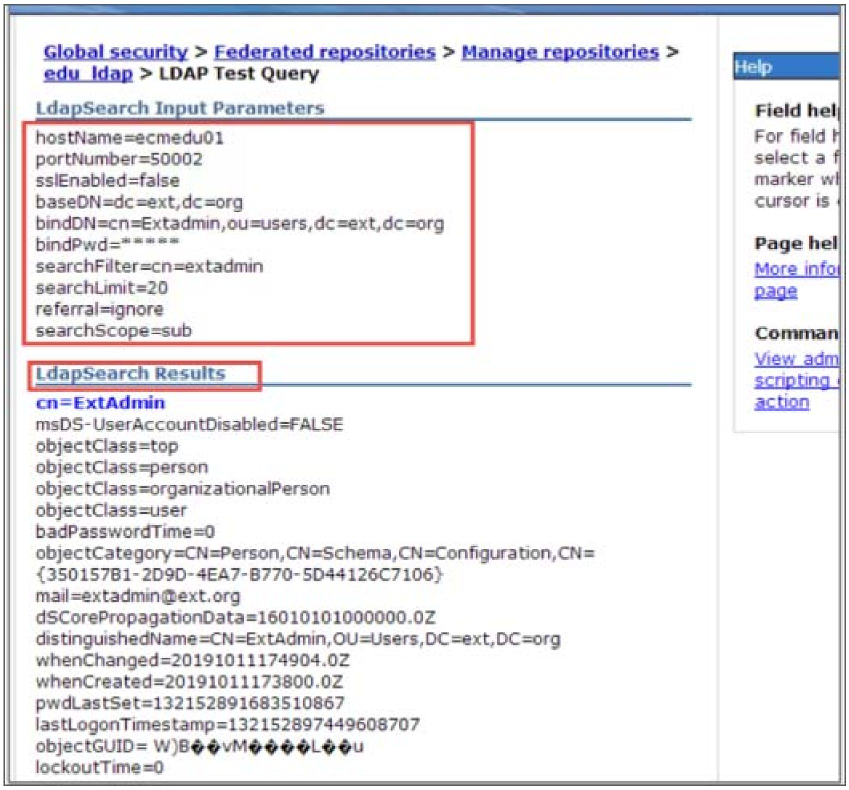
__ 8. Verify that the LDAP Search results return some data that confirms the connection to the ADAM directory is successful.



A.2.2. Configure the second LDAP in WAS

__ 1. In **WAS**, open the **Global Security** > **Federated repositories** page.

__ 2. Click **Add repositories (LDAP, custom, etc)**.

__ 3. On the **Repository reference** page, select **New Repository** > **LDAP repository**.

__ 4. On the **Repository reference** > **New** page, enter **ext_ldap**

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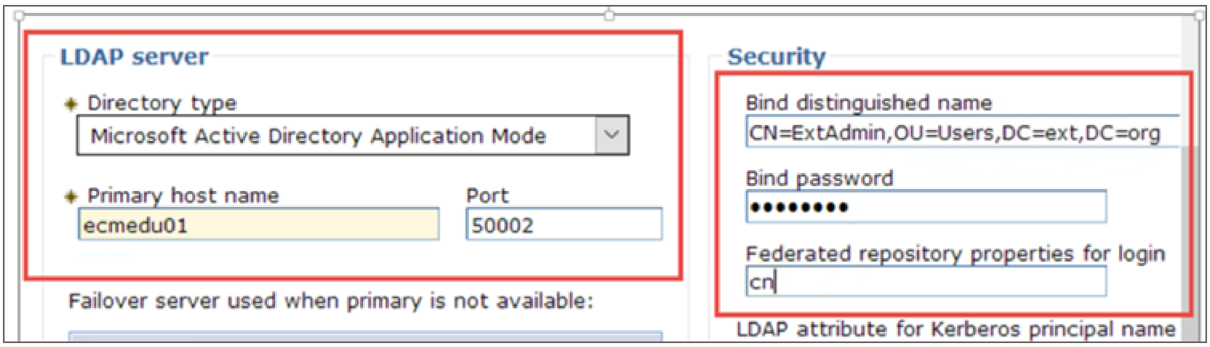
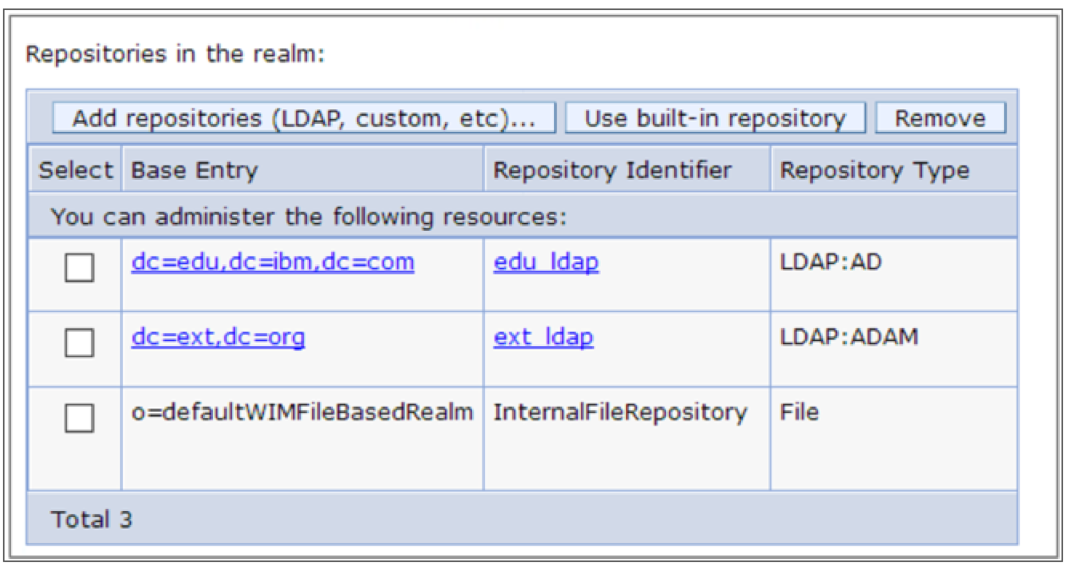
__ 5. Use the following values for **LDAP server** and for **Security** sections:

- **Directory type: Microsoft Active Directory Application Mode**
- **Port:** `50002`
- **Binding distinguished name:** `CN=ExtAdmin, OU=Users,DC=ext,DC=org`
- **Binding password:** `FileNet1`
- **Federated repository properties for login:** cn



__ 6. Click **OK**, and click the **Save** link.

__ 7. On the **Federated repositories** page of WAS, verify that the new repository is listed.



Repositories in the realm:

Add repositories (LDAP, custom, etc)... | Use built-in repository | Remove

Select	Base Entry	Repository Identifier	Repository Type
You can administer the following resources:			
☐	dc=edu,dc=ibm,dc=com	edu_ldap	LDAP:AD
☐	dc=ext,dc=org	ext_ldap	LDAP:ADAM
☐	o=defaultWIMFileBasedRealm	InternalFileRepository	File
Total 3			

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A.3.Configure Content Platform Engine

This exercise provides information on the Content Platform Engine configuration for external share. The Content Platform Engine is the main component for the FileNet Content Manager repositories.

A.3.1. Configure Directory Services in ACCE

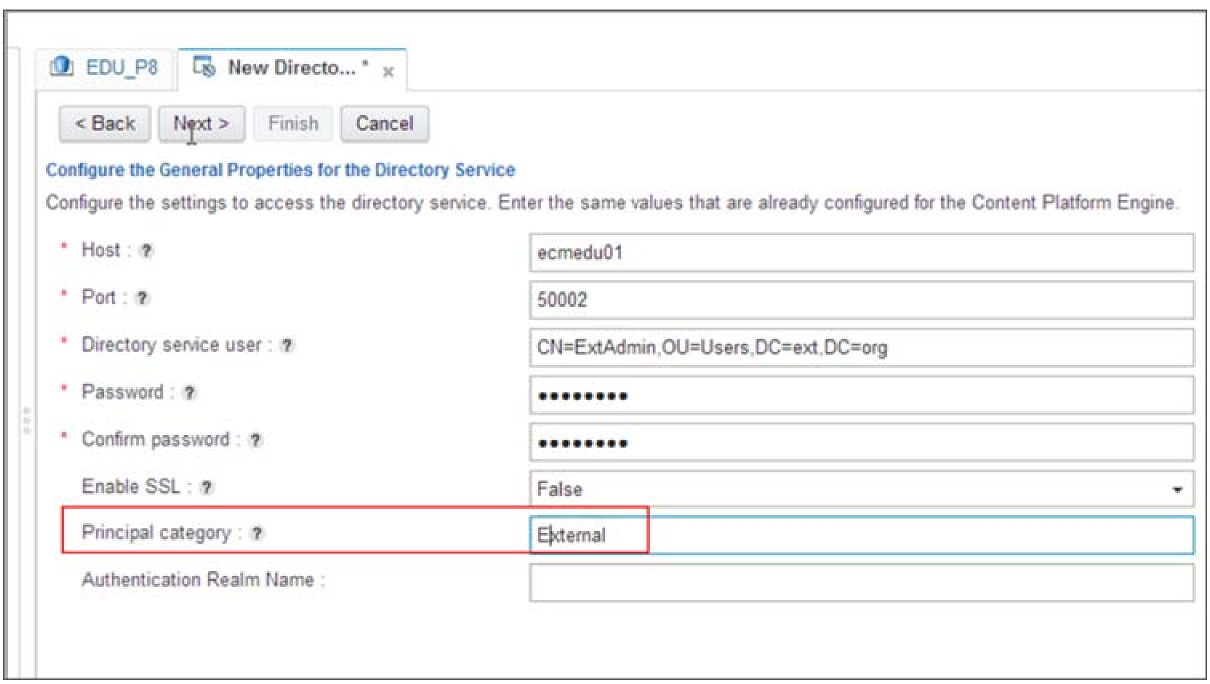
__ 1. Log in to Administration Console for Content Platform Engine (ACCE).

- **URL:** `http://ecmedu01:9080/acce`
- **User name:** `p8admin`
- **Password:** `FileNet1`

__ 2. On the **Edu_P8** domain tab, click the **Directory Configuration** subtab and click **New**.

__ 3. On **New Directory Configuration** tab, enter the following values:

- **Host:** `ecmedu01`
- **Port:** `50002`
- **Directory service user:** `CN=ExtAdmin,OU=Users,DC=ext,DC=org`
- **Password:** `FileNet1`
- **Principal category:** `External`



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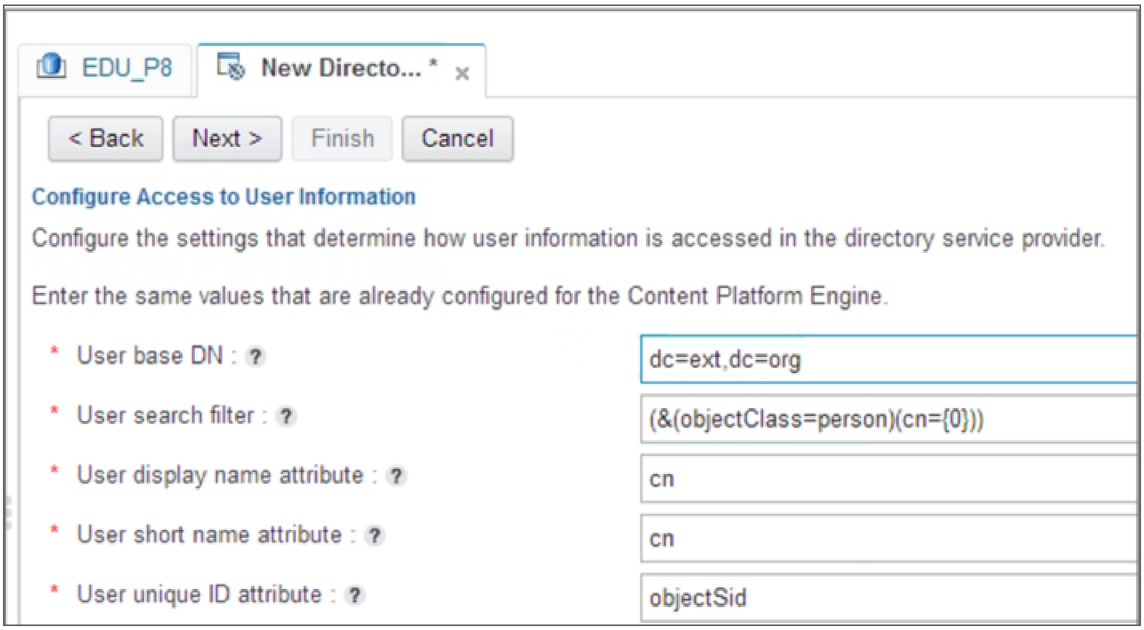
__ 4. Click **Next**, and enter the following values.

- **User base DN:** `dc=ext,dc=org`
- **User search filter:** `(&(objectClass=person)(cn={0}))`
- **User display name attribute:** cn
- **User short name attribute:** cn
- **User unique ID attribute:** `objectSid`



__ 5. Click **Next**, and enter the following values:

- **Group base DN:** `dc=ext,dc=org`
- **Group search filter:** `(&(objectClass=group)(cn={0}))`
- **Group display name attribute:** cn
- **Group short name attribute:** cn
- **Group search filter:** `(&(objectClass=group)(member={0}))`
- **Group unique ID attribute:** `objectSid`
- **Restrict membership to configured realms:** `True`

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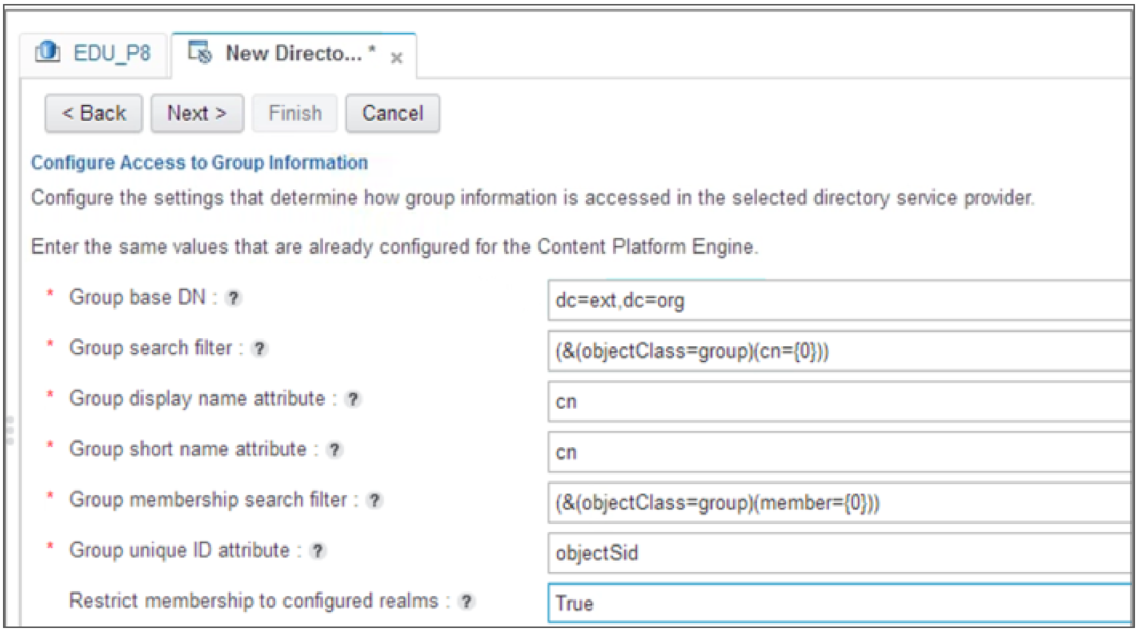
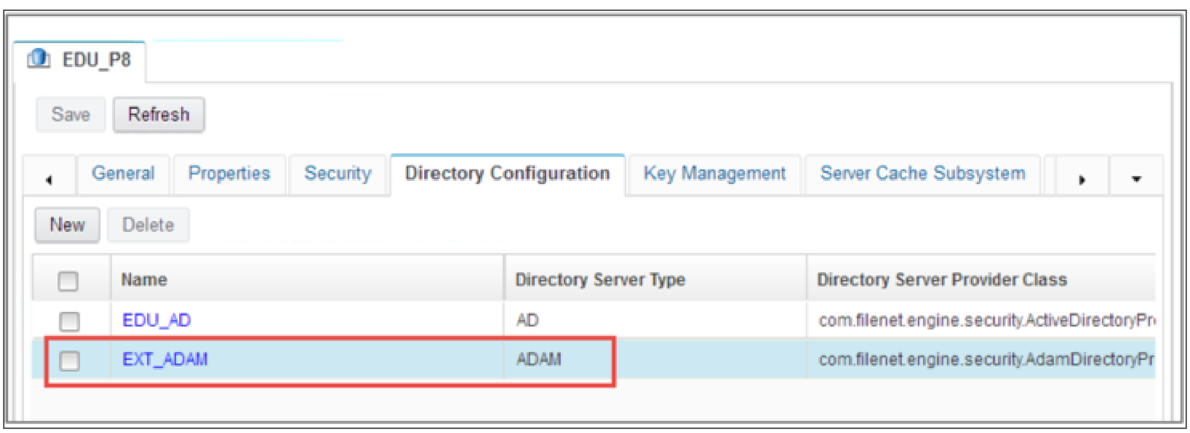


__ 6. Click **Next**, click **Finish**, and verify that the second directory is listed.



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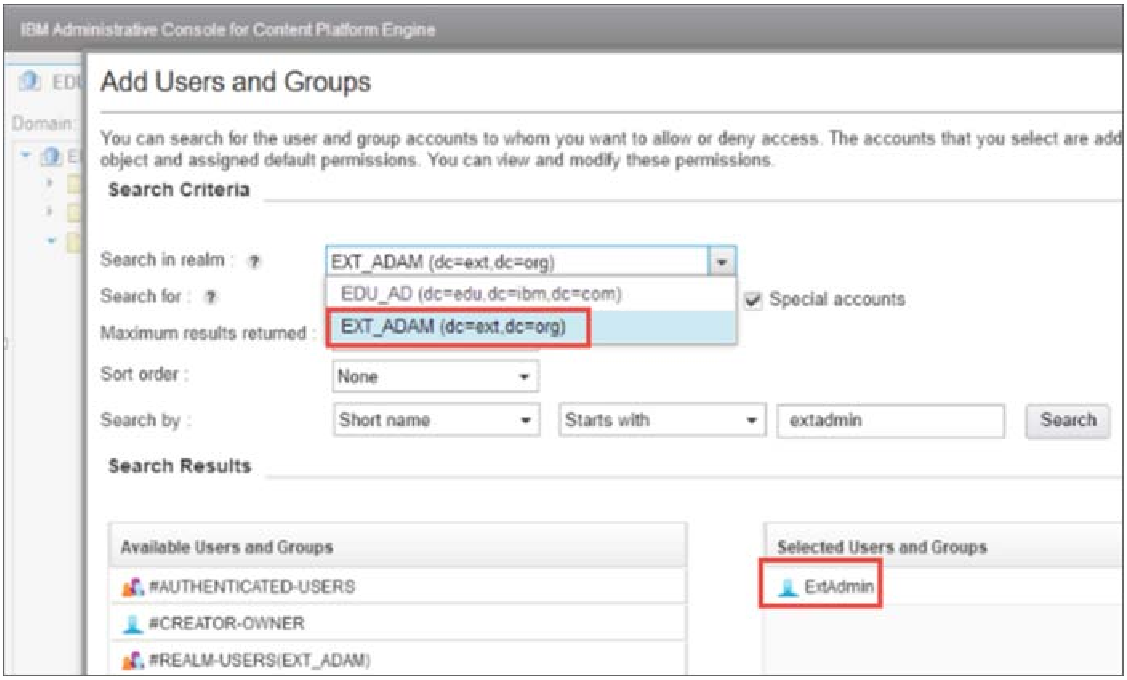
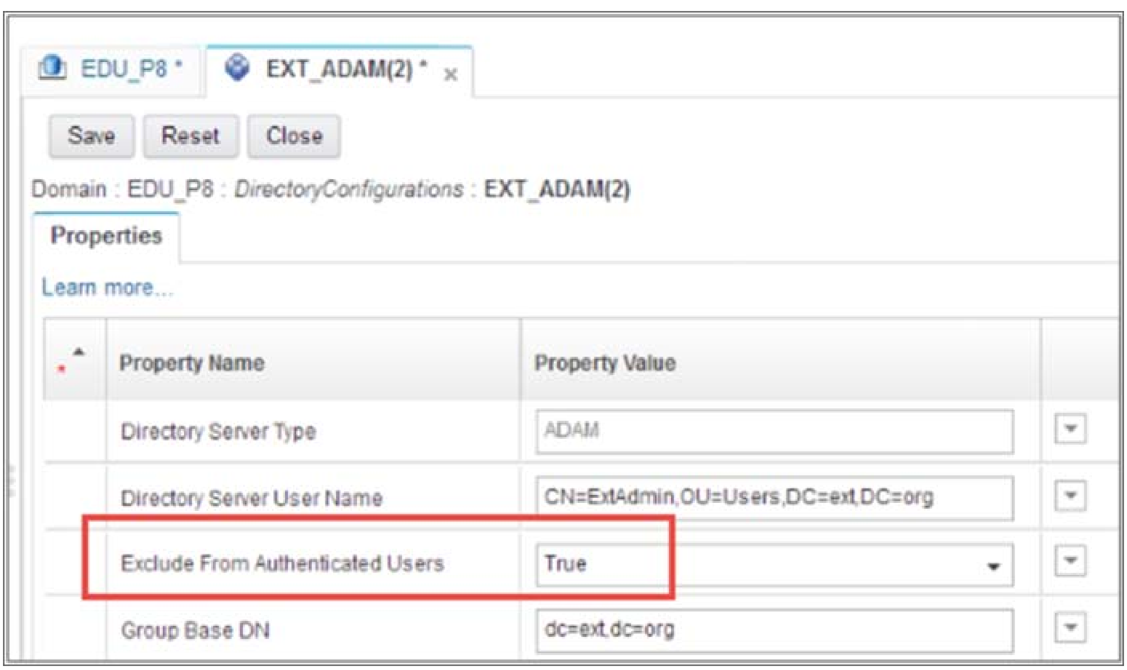
__ 7. Test by adding a user to the domain.



A.3.2. Set the Exclude property on EXT-ADAM

__ 1. In **ACCE**, on the **Directory Configuration** tab of the domain (**EDU_P8)**, click the second LDAP (**EXT_ADAM**) link.

__ 2. Set the **Exclude from Authenticated Users** property to **True**.



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When you set the property to True, it excludes all the authenticated users from accessing the content, and allows only the authorized users to access the content.

A.3.3. Grant external users Create Doc permission

In this section, you grant your group of external users Create instance permission on the Document class and subclasses that are used by entry templates in your share-enabled object store.)

__ 1. In **ACCE**, on the **EDU_P8** tab, expand **Object stores**, click the **Sales** tab.

__ 2. On the **Sales** tab, expand **Sales** > **Data Design** > **Classes** and click **Document**.

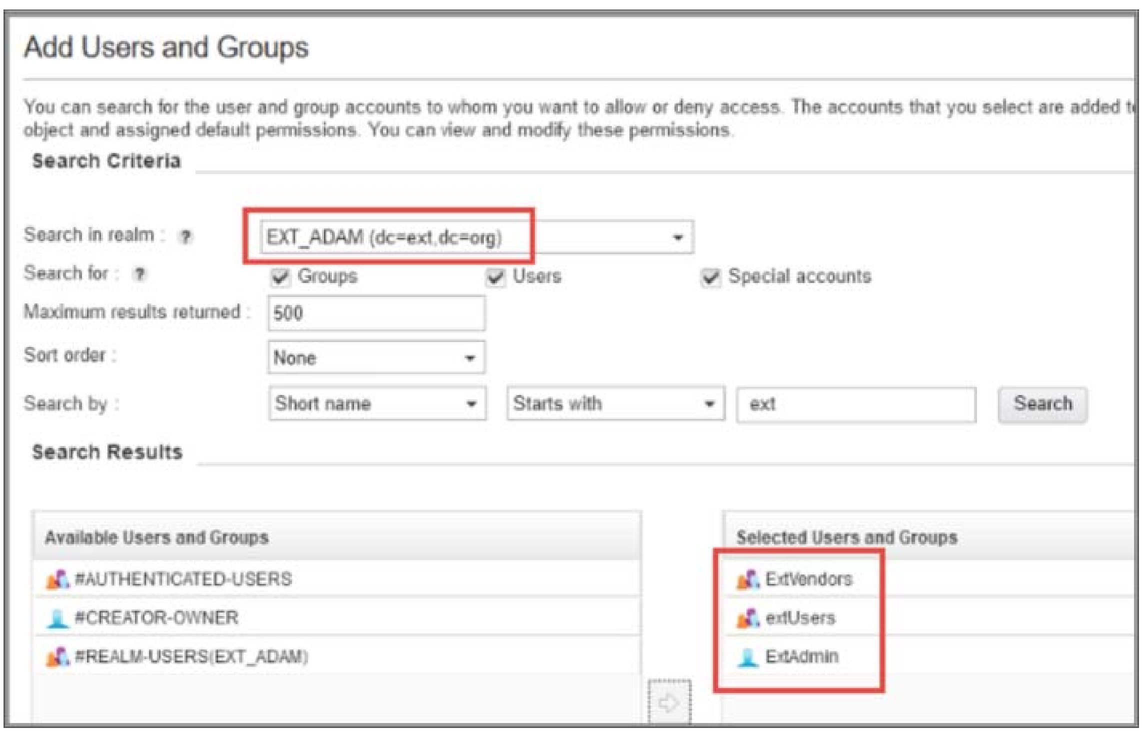
__ 3. On the **Document** class page, click the **Security** tab.

__ 4. Click **Add Permissions** > **Add User/Group Permissions**.

__ 5. On the **Add Users and Groups** page, add the group of external users from your external LDAP directory.

__ 6. Set Full Control for the **EXTAdmin.**

__ 7. For the **extUsers** and **ExtVendors** groups, set **view**, **modify**, and **create instance** permissions.



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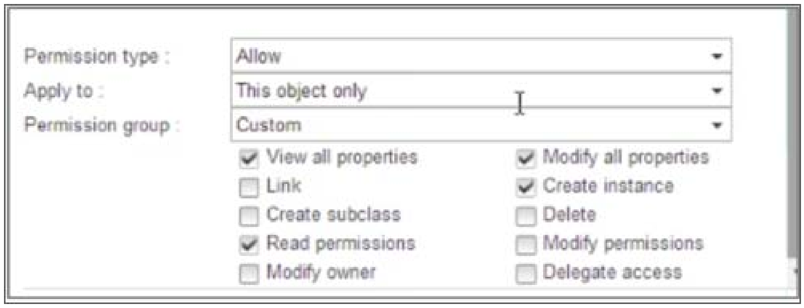

__ 8. Repeat the steps to set permissions on the **Folder** class.

__ a. On the **Sales** tab, expand **Sales** > **Data Design** > **Classes** and click **Folder**.

__ b. On the **Folder** class page, click the **Security** tab.

__ c. Click **Add Permissions** > **Add User/Group Permissions**.

__ 9. On the **Add Users and Groups** page, add the group of external users from your external LDAP directory.

A.3.4. Set security on the Document Share and Folder Share classes

In this section, you set security on the Document Share and Folder Share classes to control who can see share instances by selectively granting the share permission. For example, you might want set the share permissions to allow only supervisors to see the contents of the share records but not for all the AUTHENTICATED-USERS.

__ 1. On the **Sales** tab, expand **Data Design** > **Classes** > **Other Classes** > **Abstract Persistable** > **Share** and click **Document Share**.

__ 2. On the **Document Share** pane, click the **Default Instance Security** tab.

__ 3. Click the check-box for **#AUTHENTICATED-USERS**, then click **Remove**.

__ 4. Save your changes.

__ 5. On the **Sales** tab, expand **Data Design** > **Classes** > **Other Classes** > **Abstract Persistable** > **Share** and click **Folder Share**.

__ 6. On the **Folder Share** pane, click the **Default Instance Security t**ab.

__ 7. Click the check-box for **#AUTHENTICATED-USERS,** then click **Remove**.

__ 8. Save your changes.

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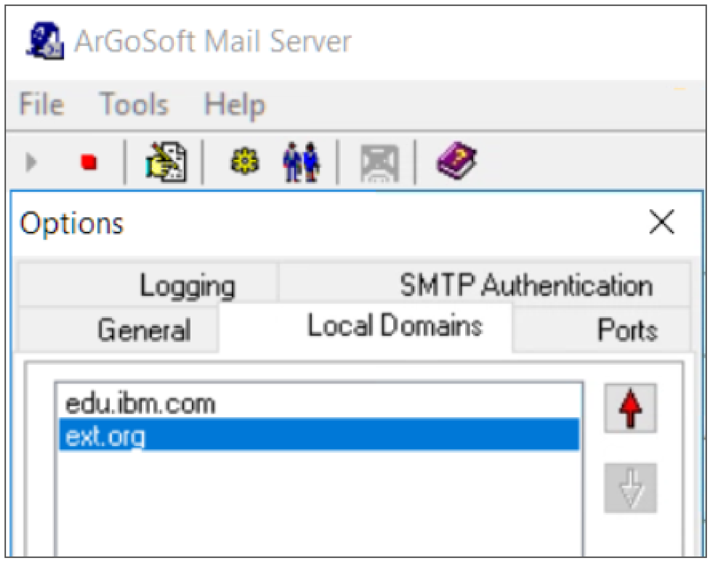
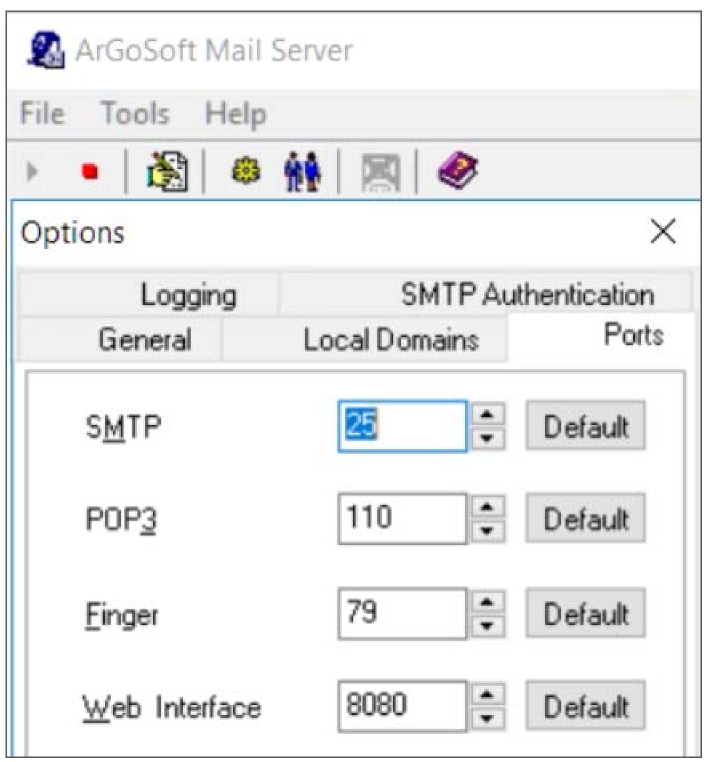
A.3.5. Configure SMTP for external share

In this section, you configure SMTP for external share in ACCE. You must first install a mail server before configuring it in ACCE. The student system uses Argosoft mail server.

1. Double-click the **Argosoft** shortcut on the desktop.
2. On the **Local Domains** tab, specify the LDAP domains **ext.org** and **edu.ibm.com**.



The default SMTP port is **25**.



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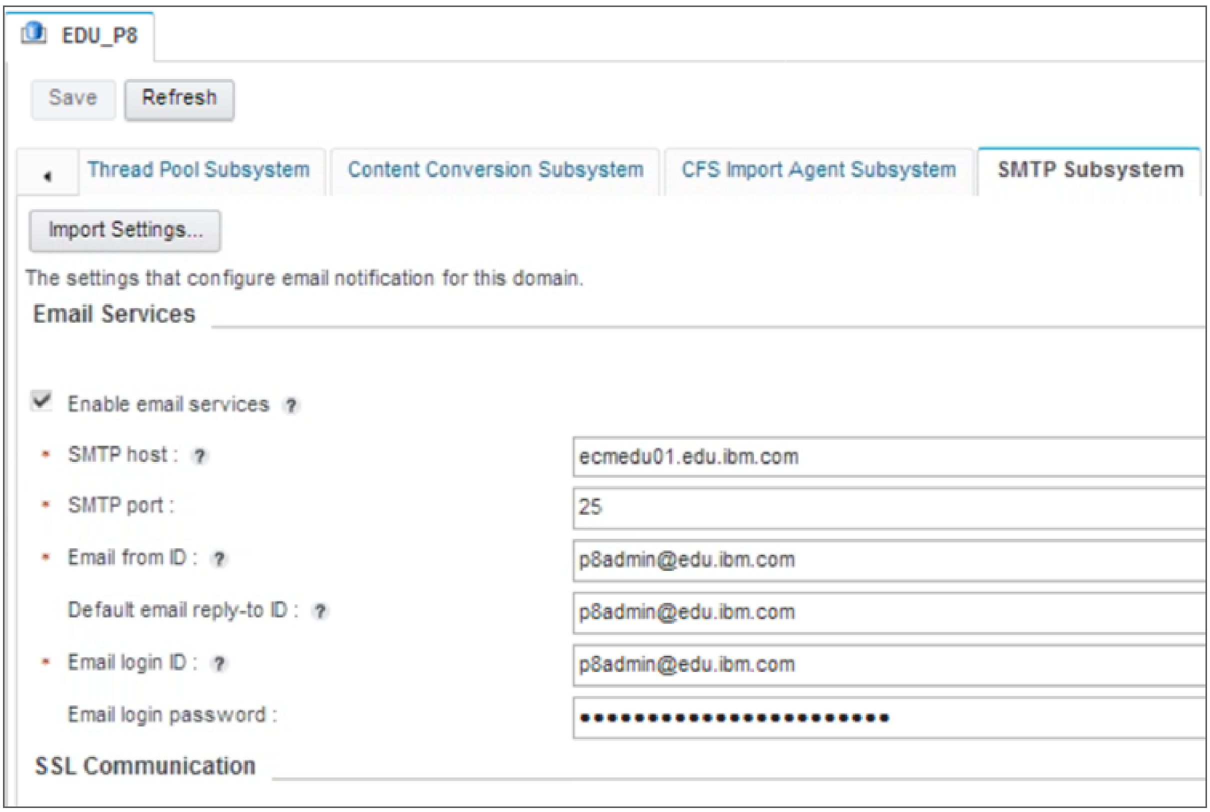
__ 3. In **ACCE**, on the **EDU_P8** tab, select the **SMTP Subsystem** tab and set the following values:

- **Enable email services**: select the option
- **SMTP host:** `ecmedu01.edu.ibm.com`
- **SMTP port:** 25
- **Email from ID:** `p8admin@edu.ibm.com`
- **Default email reply-to ID:** `p8admin@edu.ibm.com`
- **Email login ID:** `p8admin@edu.ibm.com`
- **Email login password:** `FileNet1`



__ 4. Save the settings.

__ 5. Log out of ACCE and close the browser.

End of appendix

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