Course Guide

IBM Content Navigator Administration V3.0.6

Course code WF270 / ZF270 ERC 1.0

IBM Training

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Course description

IBM Content Navigator Administration V3.0.6

Duration: 4 days

Purpose

This course provides technical professionals with the skills that are needed to configure, customize, and administer the IBM Content Navigator web client for IBM FileNet Content Manager.

The course begins with an introduction to IBM Content Navigator. You learn how to view, add, modify, and search for content in the web client. You learn how to connect to repositories, create new desktops, define cross-repository searches, create teamspaces, configure IBM Content Navigator Sync services and Edit services client, define role-based redactions, and build entry templates. You also configure external share to securely share documents with users outside of your organization. You learn how to customize the desktop appearance, modify menus, icons, and labels, create a viewer map, and register a plug-in.

IBM Content Navigator can be used to manage content from different types of repositories such as IBM FileNet Content Manager, IBM Content Manager, IBM Content Manager OnDemand, CMIS, and Box. This course focuses on IBM FileNet Content Manager.

Through instructor-led presentations and hands-on lab exercises, you learn about the core features of IBM Content Navigator.

The lab environment for this course uses Windows Server 2016 Standard Edition.

Audience

This course is intended for administrators of IBM Content Navigator.

Prerequisites

- Familiarity with content management concepts
- Recommended course or equivalent knowledge: IBM FileNet P8 Platform Essentials (V5.5.x) (F2800G)

Objectives

- Identify the capabilities of IBM Content Navigator
- 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
- Associate entry templates with a folder
- 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

Contents

Refer to the contents section (TOC) for course content.

Agenda

Note

The following unit and exercise durations are estimates, and might not reflect every class experience.

Day 1

(00:15) Course introduction
(02:00) Unit 1. Introducing IBM Content Navigator
(03:15) Exercise 1. Working with repository content
(02:00) Unit 2. IBM Content Navigator Configuration

Day 2

(04:00) Exercise 2. Configuring an IBM Content Navigator desktop
(02:00) Unit 3. Customizing an IBM Content Navigator Desktop
(01:00) Exercise 3. Customizing an IBM Content Navigator Desktop

Day 3

(01:30) Exercise 3. Customizing an IBM Content Navigator Desktop
(01:30) Unit 4. Entry Templates
(01:30) Exercise 4. Configuring Entry Templates
(01:00) Unit 5. Role-based redactions
(01:30) Exercise 5. Configuring and working with role-based redactions

Day 4

(01:00) Unit 6. IBM Content Navigator Sync
(01:30) Exercise 6. Configuring and using IBM Navigator Sync
(01:00) Unit 7. IBM Content Navigator Edit Service
(01:00) Exercise 7. Configuring and using the Edit Service client
(01:00) Unit 8. External Share
(01:30) Exercise 8. Configuring and managing external share

Unit 1. Introducing IBM Content Navigator

Estimated time

02:00

Overview

This unit introduces IBM Content Navigator and describes its capabilities.

How you will check your progress

- Review
- Exercise

References

https://www.ibm.com/support/knowledgecenter/SSEUEX_3.0.6/com.ibm.installingeuc.doc/eucco037.htm

IBM Training

Unit objectives

- Identify the capabilities of IBM Content Navigator
- Describe the graphic user interface (GUI) elements in IBM Content Navigator
- Learn how to view and search for repository content, add content to repositories, and merge and split documents

Introducing IBM Content Navigator

Figure 1-1. Unit objectives

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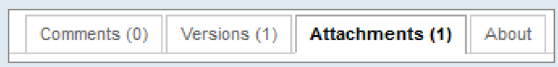
How to check online for course material updates

Note: If your classroom does not have internet access, ask your instructor for more information.

Instructions

1. Enter this URL in your browser: **ibm.biz**/CloudEduCourses
2. Find the product category for your course, and click the link to view all products and courses.
3. Find your course in the course list and then click the link.
4. The wiki page displays information for the course. If the course has a course corrections document, this page is where it is found.
5. If you want to download an attachment, such as a course corrections document, click the **Attachments** tab on the page.



6. To save the file to your computer, click the document link and follow the prompts.

Introducing IBM Content Navigator

Figure 1-2. How to check online for course material updates

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Topics

- What is IBM Content Navigator?
- View repository content
- Add content to a repository
- Search for content in a repository
- Merge and split documents

Introducing IBM Content Navigator

Figure 1-3. Topics

1.1. What is IBM Content Navigator?

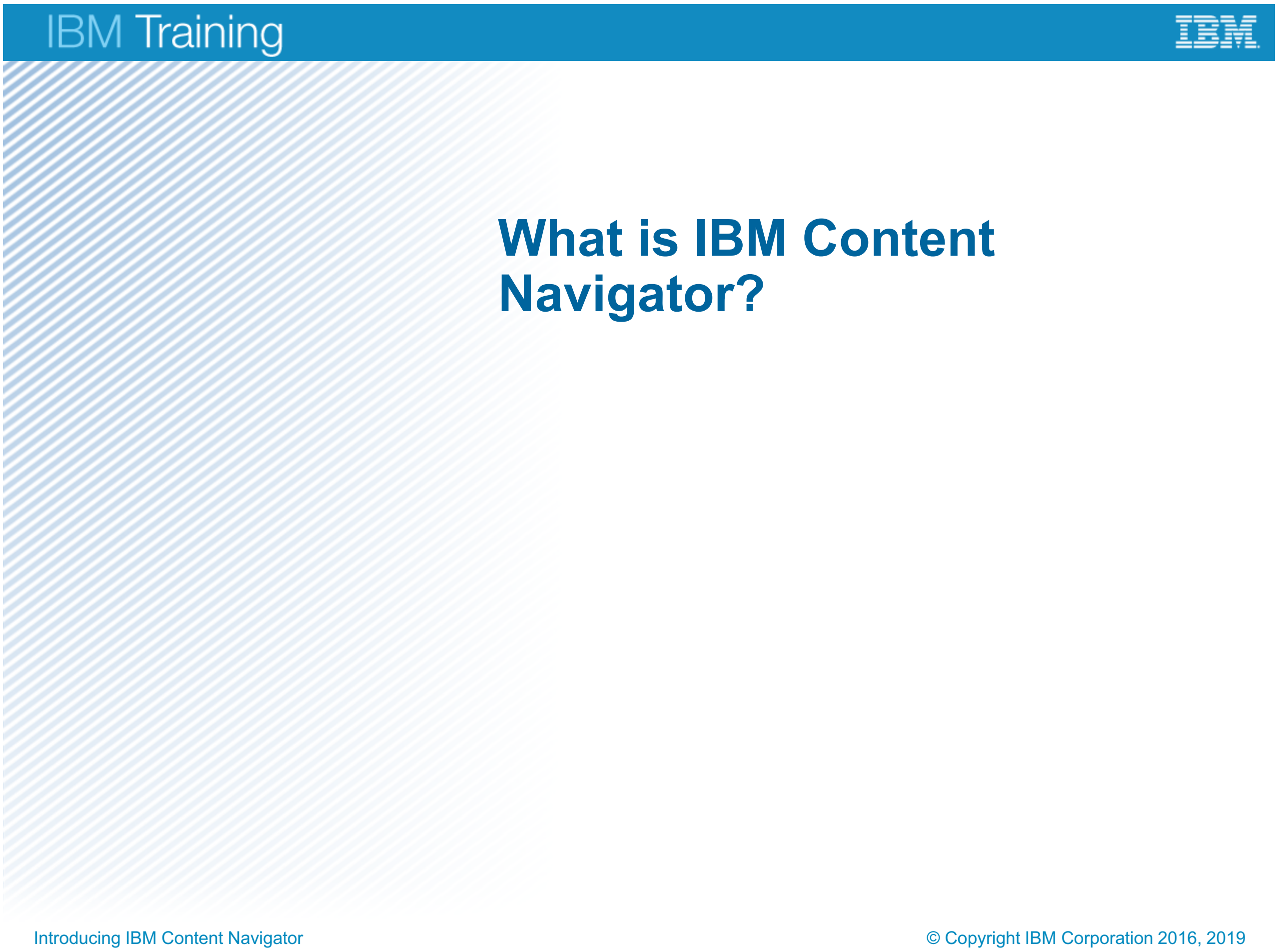

Figure 1-4. What is IBM Content Navigator?

IBM Training

What is IBM Content Navigator?

A web client and framework for working with content that:

- Enables users to create custom views of content for collaboration
  - Use of teamspaces for team projects
- Allows users to sync content across devices
- Helps to save time with entry templates to manage documents
- Enables users to run cross-repository searches
- Provides role-based redaction capabilities
- Enables users to easily add files or edit files in the applications that are originally used to create the files
- Includes an Administration tool to configure and customize the desktops
- Allows users to share content securely with users who are outside of your organization
- Provides work item processing capabilities
- Includes a powerful API toolkit

Introducing IBM Content Navigator

Figure 1-5. What is IBM Content Navigator?

IBM Content Navigator is a web client and a framework that provides users with a console for working with content from multiple content management repositories.

- You can create custom views of the content by creating teamspaces that provide a focused view of the relevant documents, folders, and searches that a team needs to complete their tasks. You learn more on teamspaces in another lesson in this course.
- You can use the IBM Content Navigator's powerful API toolkit to extend the web client and build custom applications.
- In the Administration tool, you can customize the desktops for different use-cases and user roles. An IBM Content Navigator desktop is a customized interface and you can create many desktops for different scenarios.

Content Management actions in IBM Content Navigator include:

- Add, edit, and delete folders and documents
- View documents
- Create Document Versions
- Work with properties
- Annotate and redact documents

- Create shortcuts for frequently used items (Favorites)
- Search for documents from one or more repositories

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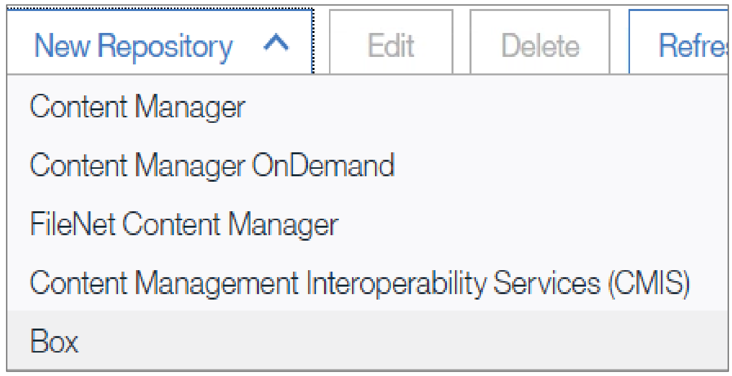
Advantages of IBM Content Navigator

- Unify the sources
  - IBM FileNet Content Manager
  - IBM Content Manager
  - IBM Content Manager OnDemand
  - Content Management Interoperability Services (CMIS)
  - Box



- Access Everywhere
  - Microsoft Office integration, Mobile devices
- Accelerate customization and extend the features, using the:
  - IBM Content Navigator administration tool
  - API toolkit and plug-ins capability

Introducing IBM Content Navigator

Figure 1-6. Advantages of IBM Content Navigator

The screen capture shows the types of repositories that you can configure and work with in IBM Content Navigator.

You access content from different repositories on different devices by using IBM Content Navigator. You configure and customize the desktops by using the administration tool. IBM Content Navigator includes rich set of API toolkit and it provides plug-ins capability to customize and extend the features. It integrates with Microsoft Office for content management.

Note that not all features are available for all content sources. This course focuses on managing the content in the FileNet Content Manager repositories.

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Viewer capabilities available in IBM Content Navigator

- Preview documents
- View documents side by side
- View and edit document properties
- View video files
- View multiple content elements
- Add role-based redactions
- Add annotations
- Merge and split documents

Introducing IBM Content Navigator

Figure 1-7. Viewer capabilities available in IBM Content Navigator

Not all the features in IBM Content Navigator are available for all content sources. This course focuses on the capabilities that are available with FileNet Content Manager (P8) repositories.

1.2. View repository content

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View repository content

Introducing IBM Content Navigator

Figure 1-8. View repository content

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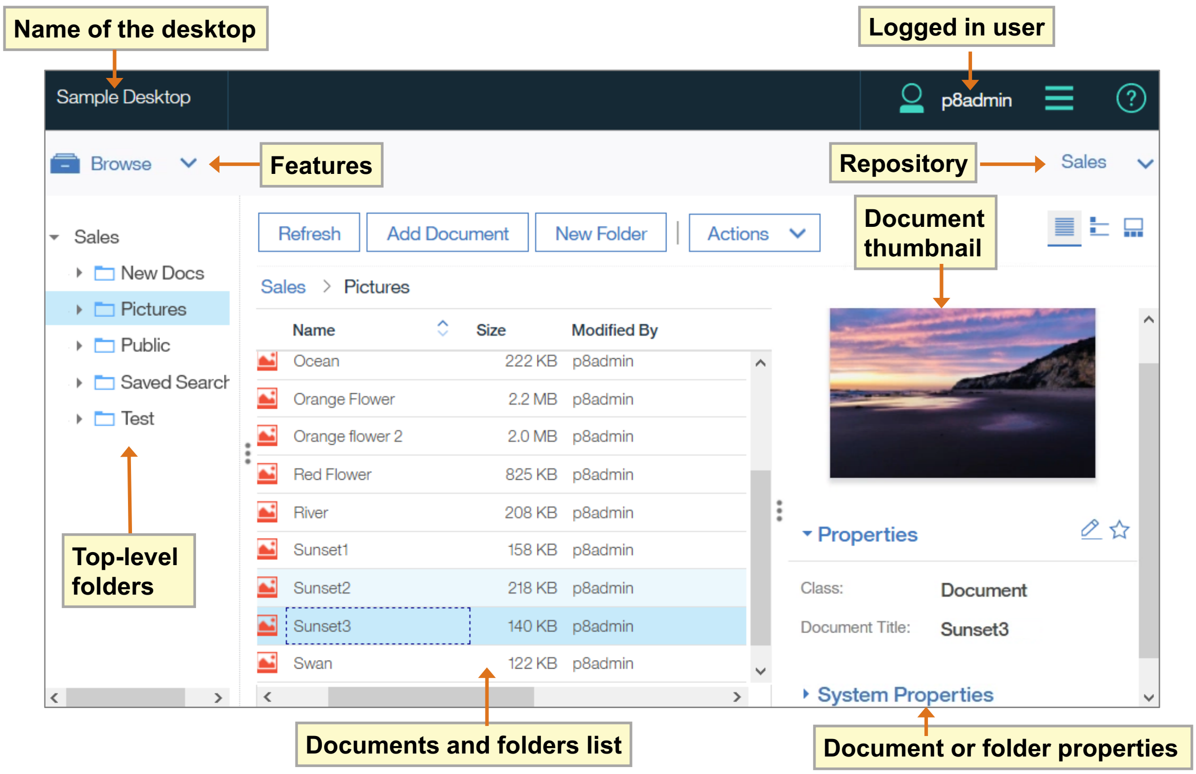
IBM Content Navigator desktop interface



Introducing IBM Content Navigator

Figure 1-9. IBM Content Navigator desktop interface

The screen capture shows the various elements in the IBM Content Navigator desktop interface. The Browse view is selected.

Name of the desktop and logged in user

They are shown on the banner.

Features

You can select a feature (which provides a view for that feature) from the list on the upper left.

Examples:

- Home
- Browse
- Search
- Teamspaces
- Work
- Entry Template Manager
- Administration

Repository

On Browse view, you can select a repository from the list of repositories that are available for this desktop.

Top-level folders

When you select a repository from the list, the top-level folders in that repository are shown.

Documents and subfolders list

When you select a folder, a list of documents and subfolders in that folder are shown.

Document thumbnail and properties

When you select a document, the properties and thumbnail for that document are shown in the rightmost panes.

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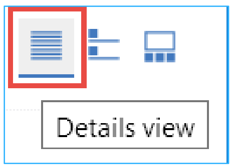
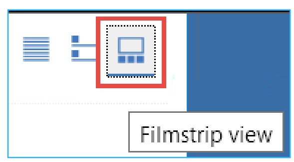
Views for the Content List



Details View

Magazine View



Filmstrip View

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Figure 1-10. Views for the Content List

The screen captures show different views available for content list (documents and folders) in IBM Content Navigator.

IBM Training

Preview a document

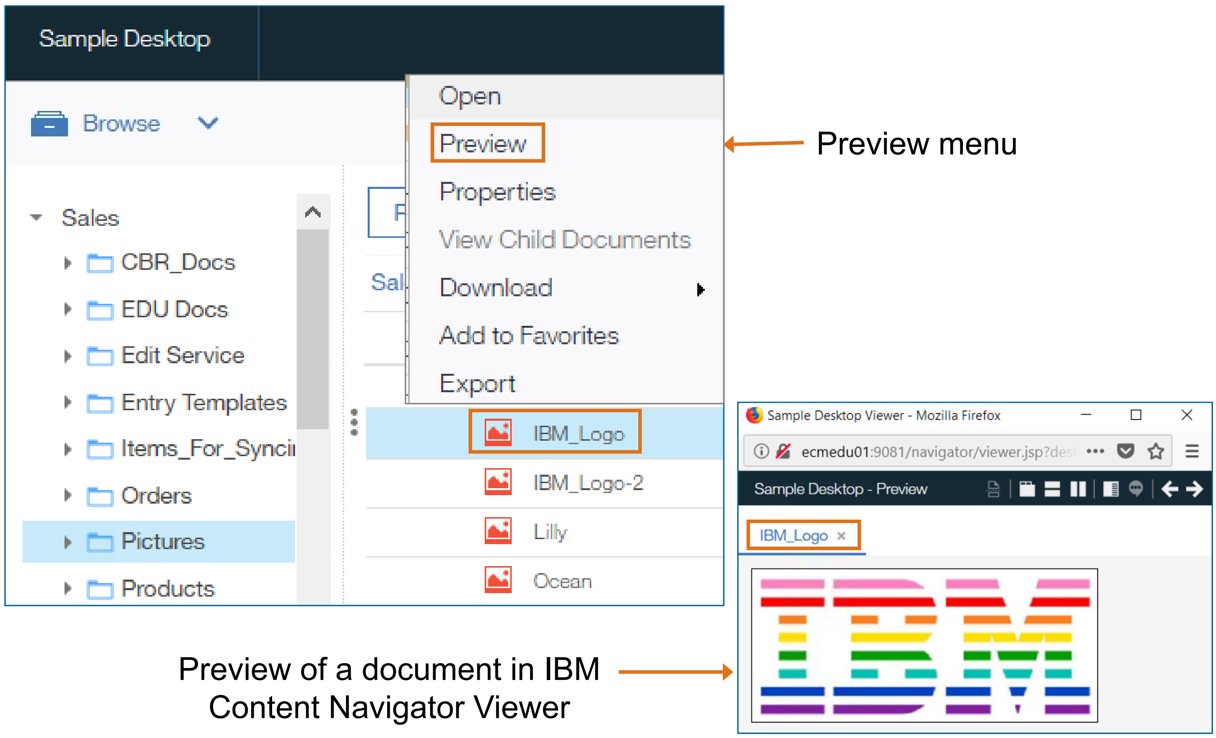

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Figure 1-11. Preview a document

The upper left screen capture shows the Preview menu and the lower right shows preview of a document in IBM Content Navigator Viewer.

IBM Training

Create annotations for a document

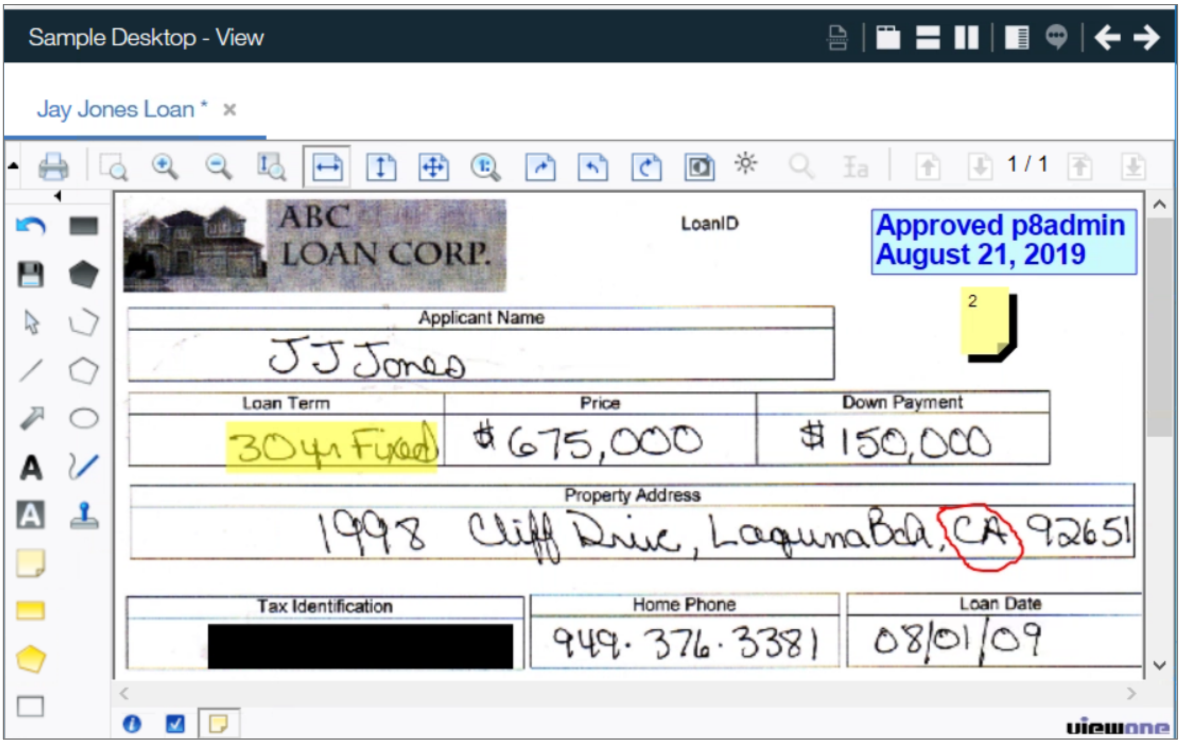

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Figure 1-12. Create annotations for a document

The screen capture shows a document with sample annotations in IBM Content Navigator Viewer.

A list of annotations that you can create in IBM Content Navigator viewer:

- Highlight a text (shown in yellow)
- Draw a stamp (shown in blue color) with text such as user name, date, and approved.
- Circle text (shown in red color)
- Add a sticky note (shown as a small yellow sticky note icon)
- Create a redaction (Shown as a block in black color)
- Draw arrow and other shapes
- Enter text

IBM Training

View two documents

- View the documents side by side in the same IBM Content Navigator Viewer page.

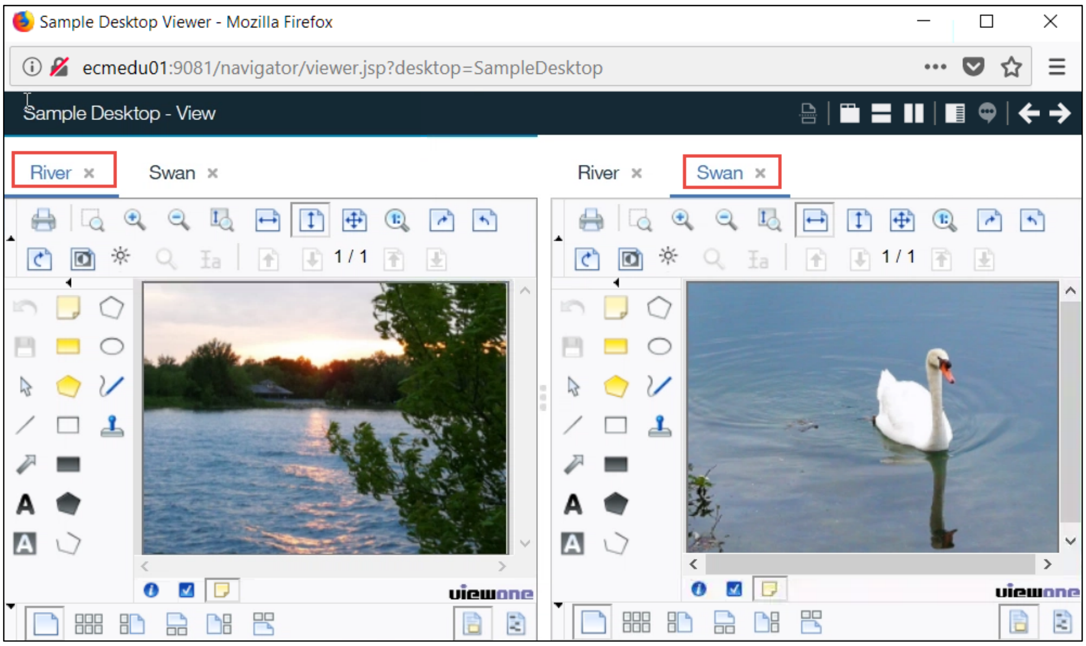

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Figure 1-13. View two documents

The screen capture shows that two documents opened side by side in the same IBM Content Navigator Viewer page. You can also arrange the documents that are vertically stacked.

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IBM Content Navigator support for video files

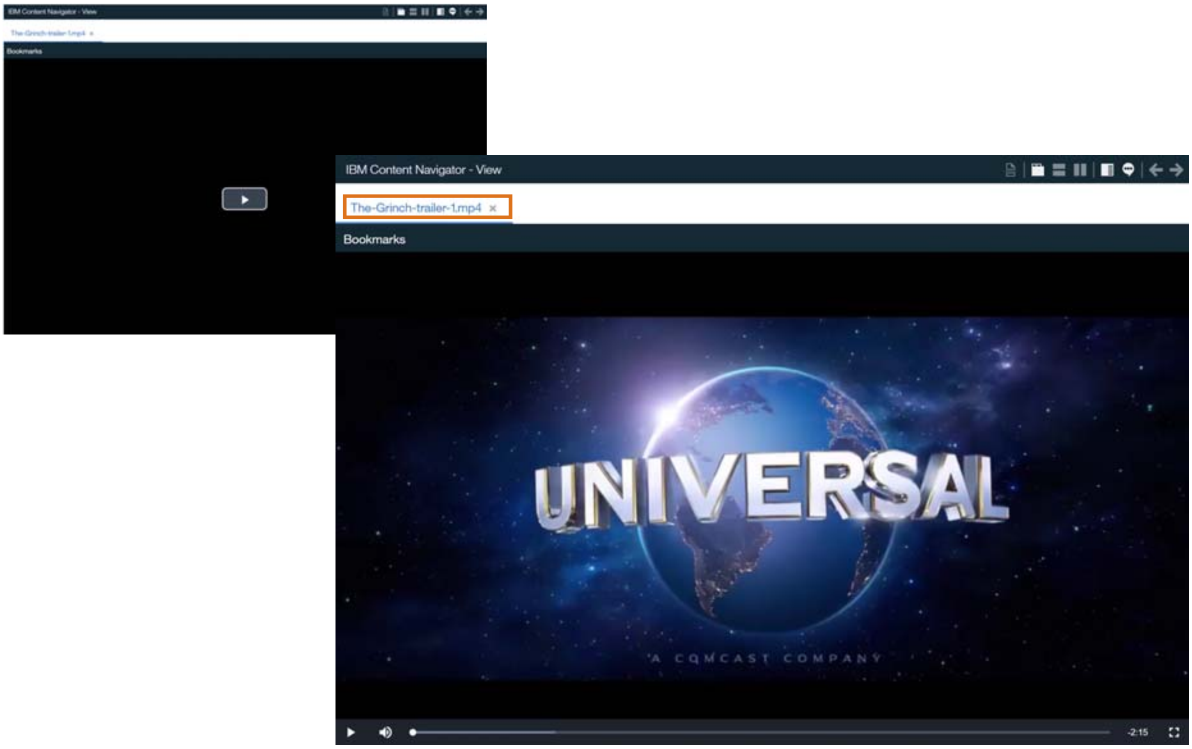

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Figure 1-14. IBM Content Navigator support for video files

The upper screen capture shows a video document (mp4 file format) opened in the Viewer. The lower screen capture shows the video playing after the Play button is clicked.

- The video viewer plays video files in browsers that natively support MP4 playback.

Play Videos in the Video Viewer

- To open a video file in viewer, double click on the document or use the context menu.
- When you open the video, the viewer shows a play button. Click on the play button to show the video.
- Player options include: Play or Pause, Volume, Time, and Full Screen

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Add bookmarks to videos

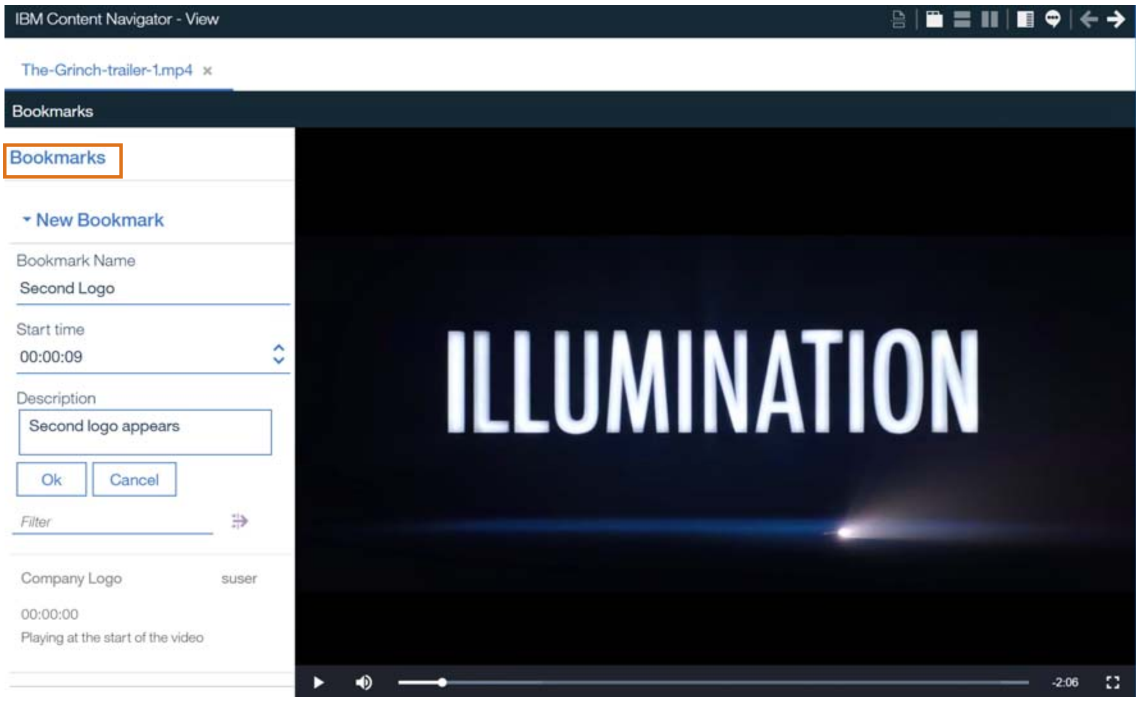

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Figure 1-15. Add bookmarks to videos

The screen capture shows a video document opened in the Viewer. A bookmark is added.

- Bookmarks can be added at any point in the time line
- You can specify a name, time, and description for the bookmark
- You can add a list of bookmarks to a video

IBM Training

View multi content elements document

- IBM Content Navigator supports multi-content documents.
  - You can view the all the content elements of a document in the viewer.

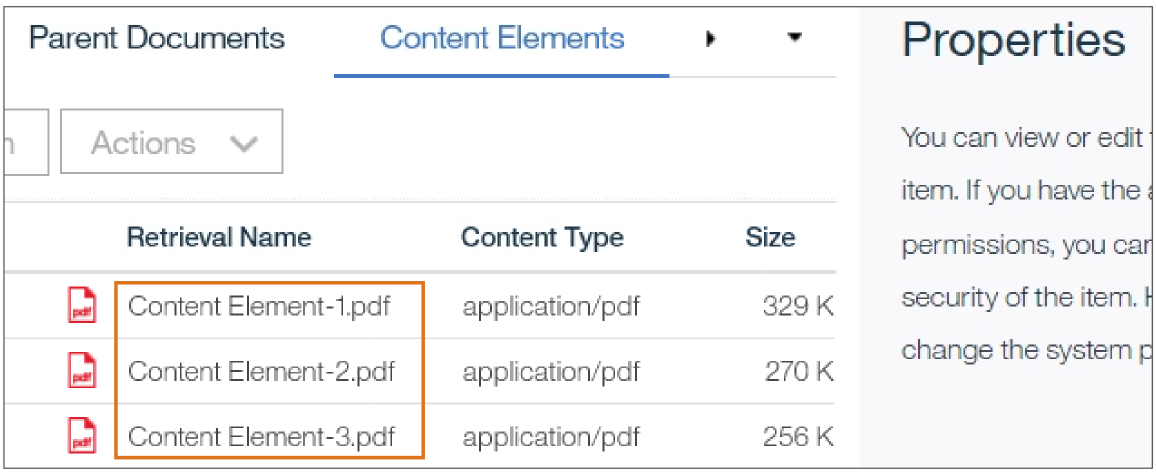

Figure 1-16. View multi content elements document

The screen capture shows the Content Elements tab on the Properties page for a document that contains multiple content elements (separate files). The list shows three PDF files that are associated with this document on the FileNet Content Manager repository.

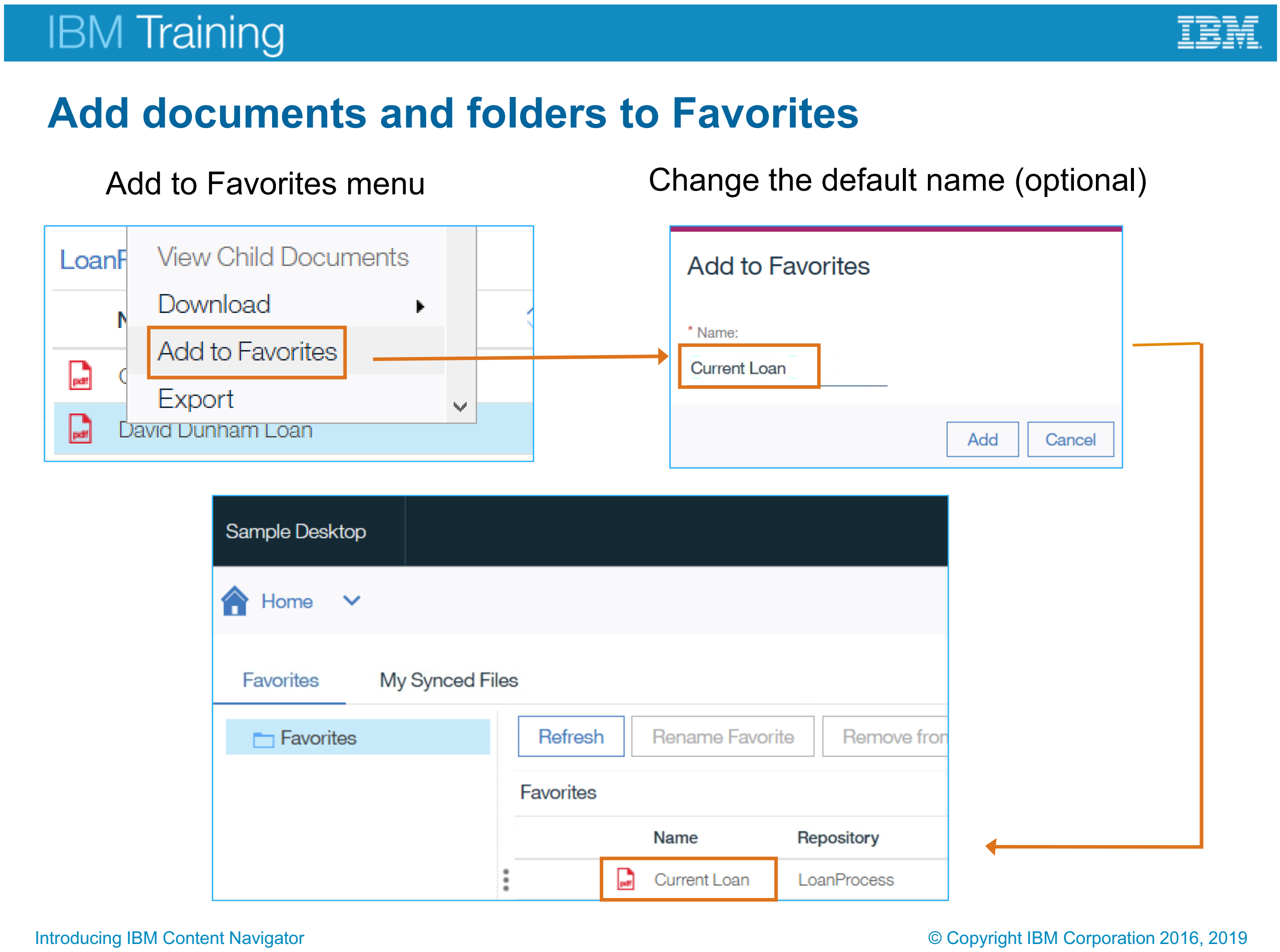

Figure 1-17. Add documents and folders to Favorites

The upper left screen capture shows the Add to Favorites menu , the upper right one shows Add to Favorites dialog box, and the lower one shows Favorites view in IBM Content Navigator.

You can add folders and documents to Favorites in IBM Content Navigator to find them quickly.

1. Right-click a document or a Folder.

2. Select Add to Favorites from the menu list. The Add to Favorites dialog box opens.

3. In the Add to Favorites dialog box, accept the default name or optionally, edit the name.

4. The document is added to the Favorites. You can access the document from the Favorites (Home icon) view.

1.3. Add content to a repository

Figure 1-18. Add content to a repository

IBM Training

Add content to repositories

You can add content to the repositories in IBM Content Navigator:

- Create folders
- Add an object to a repository:
  - A local document
  - A document without content (only metadata or information about a document)
  - Add a document for which the content is stored externally (link)
- Maintain versions for documents
- You can also create objects such as searches and entry templates

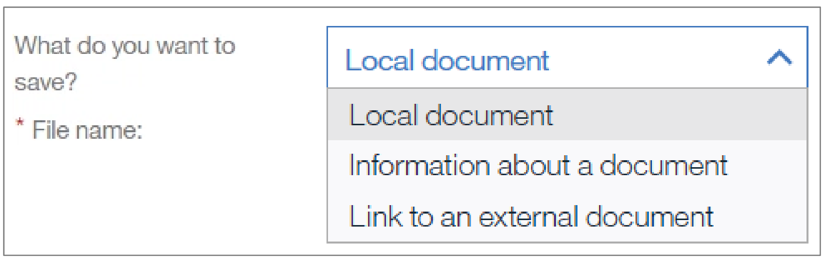

Figure 1-19. Add content to repositories

The screen capture shows the options available in IBM Content Navigator for saving a document to a FileNet Content Manager repository.

IBM Content Navigator supports creating folders, adding documents, and setting security for the objects.

In IBM Content Navigator, you can also:

- File a document to a folder
- Add multiple documents from a local directory to a repository in one action (drag). This feature is browser dependent.
- Drag folders with documents from a local directory to a repository. This feature is browser dependent.
- Add a document to Favorites to retrieve them easily
- Check out and check in a document to maintain versions

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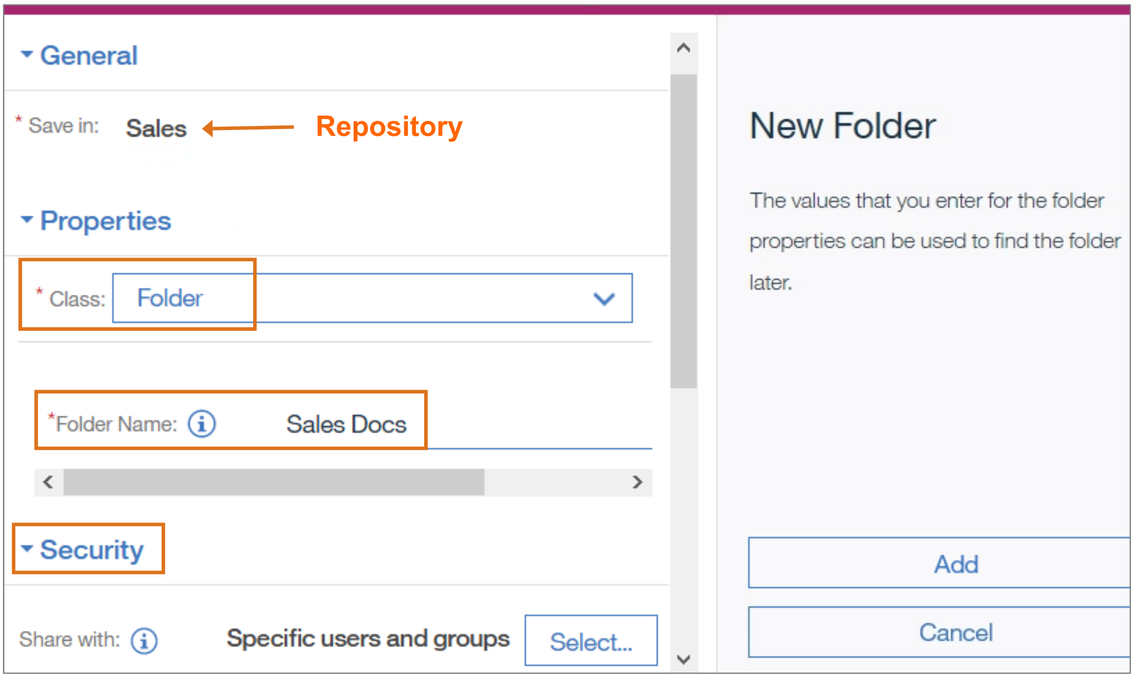
Create folders

New Folder wizard in IBM Content Navigator



Introducing IBM Content Navigator

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Figure 1-20. Create folders

The screen capture shows the New Folder wizard in IBM Content Navigator.

1. From the Browse page toolbar, click New Folder.
2. Enter or select the following values:
   - Location for the folder
   - Folder class
   - Folder Name
   - Security
3. Complete the wizard and the new folder is listed on the content list pane of the Browse page.

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Add documents in IBM Content Navigator

Add Document wizard in IBM Content Navigator.

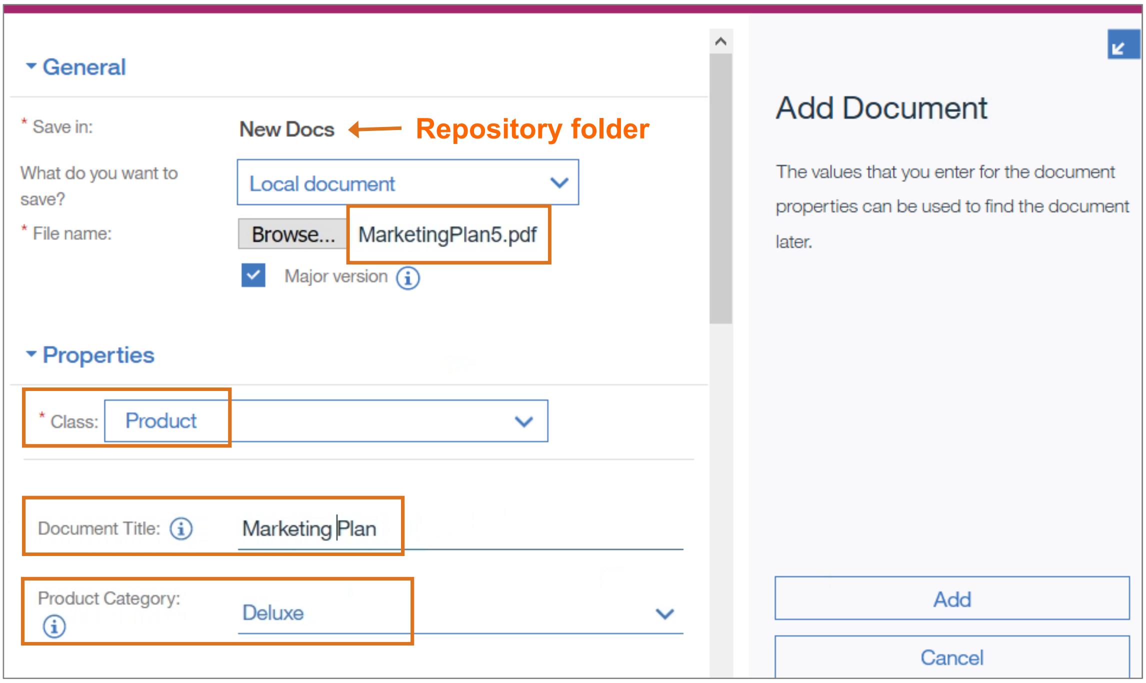

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Figure 1-21. Add documents in IBM Content Navigator

The screen capture shows the Add Document wizard in IBM Content Navigator.

1. From the Browse page toolbar, click Add Document.
2. Enter or select the following values:
   - Folder location to store the document
   - Whether it is a local document, information about a document, or a link to an external document
   - Document Class
   - Document Title
   - Document Properties
   - Security
3. Complete the wizard and the new document is listed on the content list pane of the Browse page.

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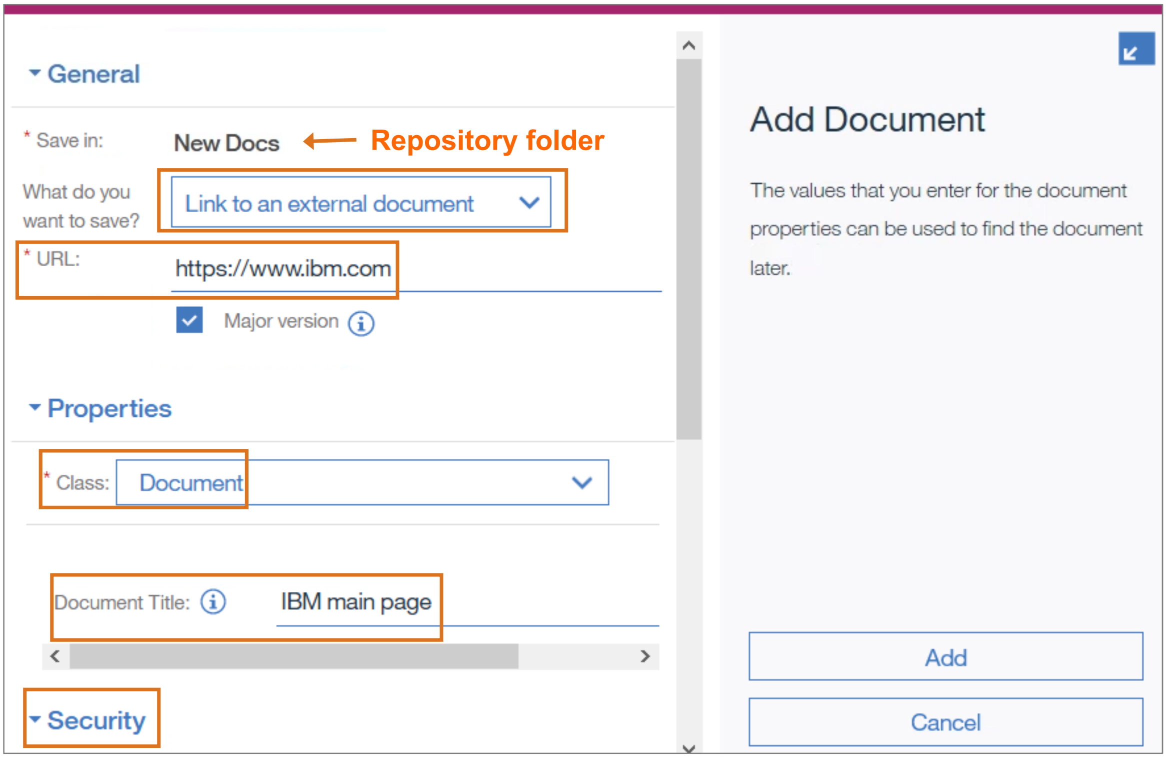
Add a link to an external document



Introducing IBM Content Navigator

Figure 1-22. Add a link to an external document

The screen capture shows adding a link to an external content the Add Document wizard of the IBM Content Navigator.

1. From the Browse page toolbar, click Add Document.

2. Enter or select the following values:

- Folder location to store the document
- Select the option: Link to an external document
- Enter the URL for the external content. The URL must start with FTP, http, or https.
- Document Class
- Document Title
- Document Properties
- Security

3. Complete the wizard and the link for the new document is listed on the content list pane of the Browse page.

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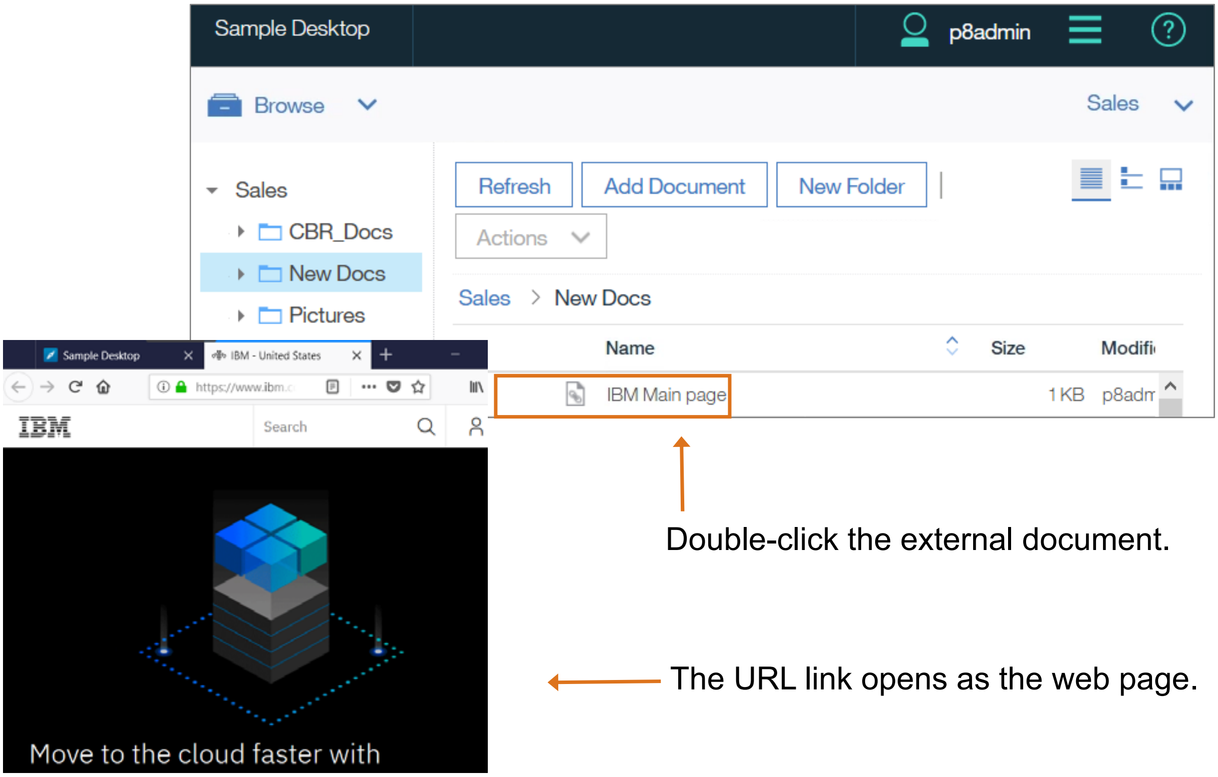
View and open an external document



Introducing IBM Content Navigator

Figure 1-23. View and open an external document

The upper screen capture shows an external document that is listed in IBM Content Navigator. An external document does not have content that is stored in the repository.

The lower screen capture shows the URL link that is opened as the web page. When you open the document, the content is shown from its external source.

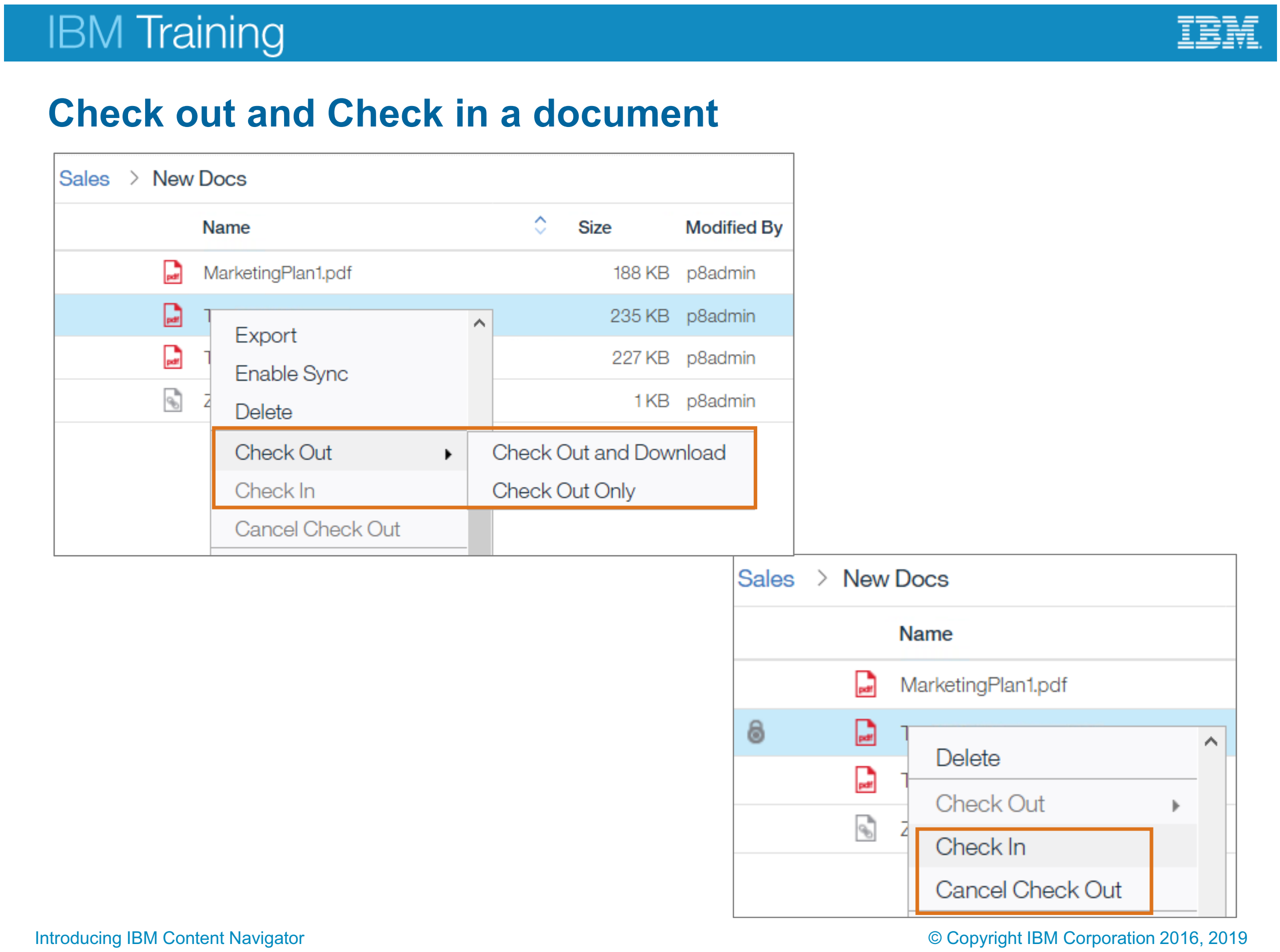


Figure 1-24. Check out and Check in a document

The upper screen capture shows the Check out and the lower one shows Check in menu options for a document in IBM Content Navigator.

In IBM Content Navigator desktop, you can check out a document for editing. Other users cannot check out the document until you check in. After edits, you can check in as a new version.

1. Right-click a document.
2. Select Check Out to check out a document for editing and choose Check Out and Download to download the document.
3. After the edits, select Check In from the menu. Complete the steps to check in a new version for the document.
4. If you do not want to check in your changes, you can select the Cancel Check Out option.

If you use Microsoft Online, ICN also supports collaborative editing. See the following URL for more information:
https://www.ibm.com/support/knowledgecenter/SSEUEX_3.0.6/com.ibm.usingeuc.doc/euche077.htm

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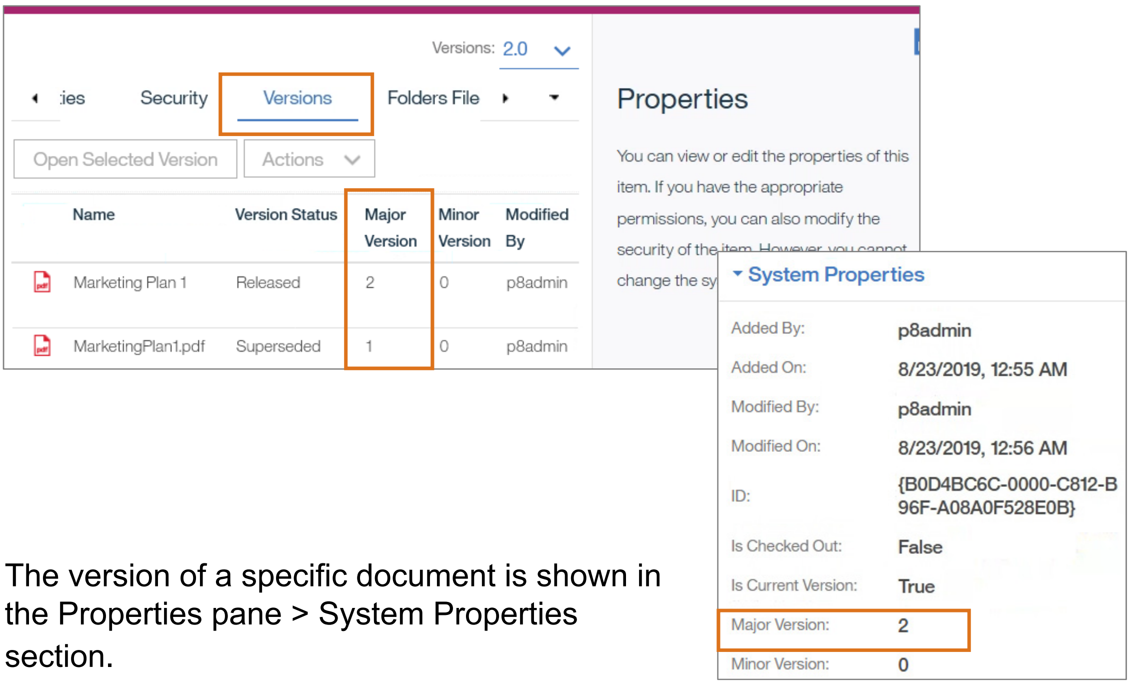
Document Versions

The versions for a document are shown in the Properties page > Versions tab.



The version of a specific document is shown in the Properties pane > System Properties section.

Introducing IBM Content Navigator

Figure 1-25. Document Versions

The upper screen capture shows the version information for a document in IBM Content Navigator: Properties page and the lower one shows Properties pane on the Browse page.

Document Versions can be viewed in the following areas of IBM Content Navigator:

- Content List > Major Version column
- Properties pane> System Properties section > Major Version
- Properties page> Versions tab

1.4. Search for content in a repository

IBM Training

Search for content in a repository

Introducing IBM Content Navigator

Figure 1-26. Search for content in a repository

IBM Training

Overview of searches

- In IBM Content Navigator, you can search for content that is based on the following items:
  - Metadata (properties of the object)
  - Text (if the repository is enabled for content-based retrieval)
- IBM Content Navigator has the following search capabilities:
  - Search for content across multiple repositories (cross-repository searches)
  - Search for content in a single repository

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Figure 1-27. Overview of searches

The Cross-repository searches topic is discussed in a later unit of the course.

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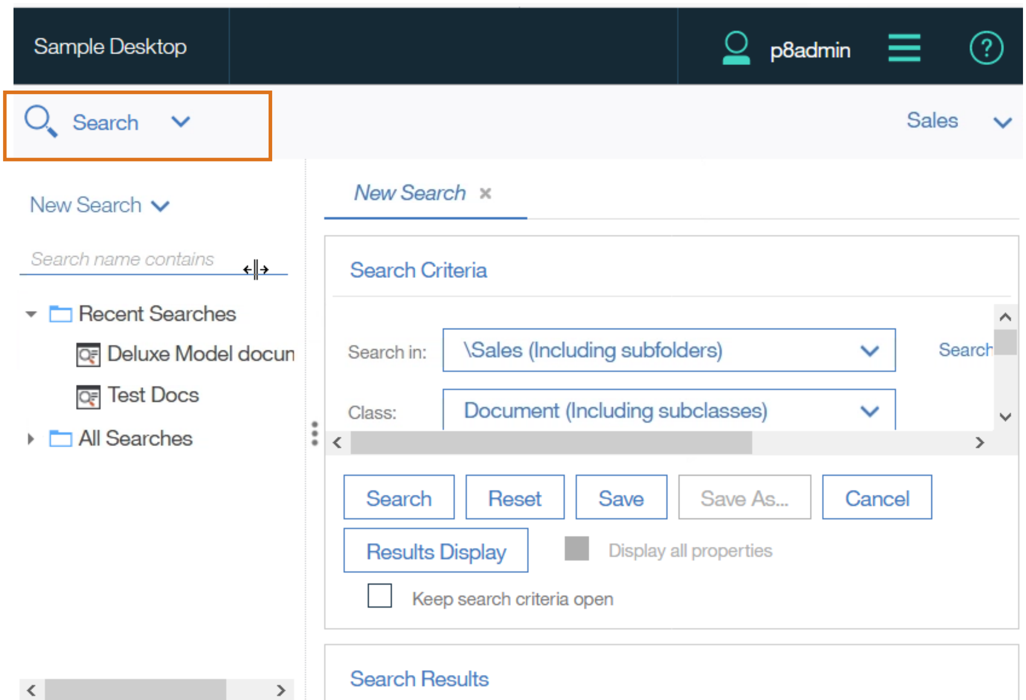
Search view in IBM Content Navigator

- Find documents and folders in repositories.



Introducing IBM Content Navigator

Figure 1-28. Search view in IBM Content Navigator

The screen capture shows the Search view in IBM Content Navigator where you can search for content in FileNet Content Manager repositories.

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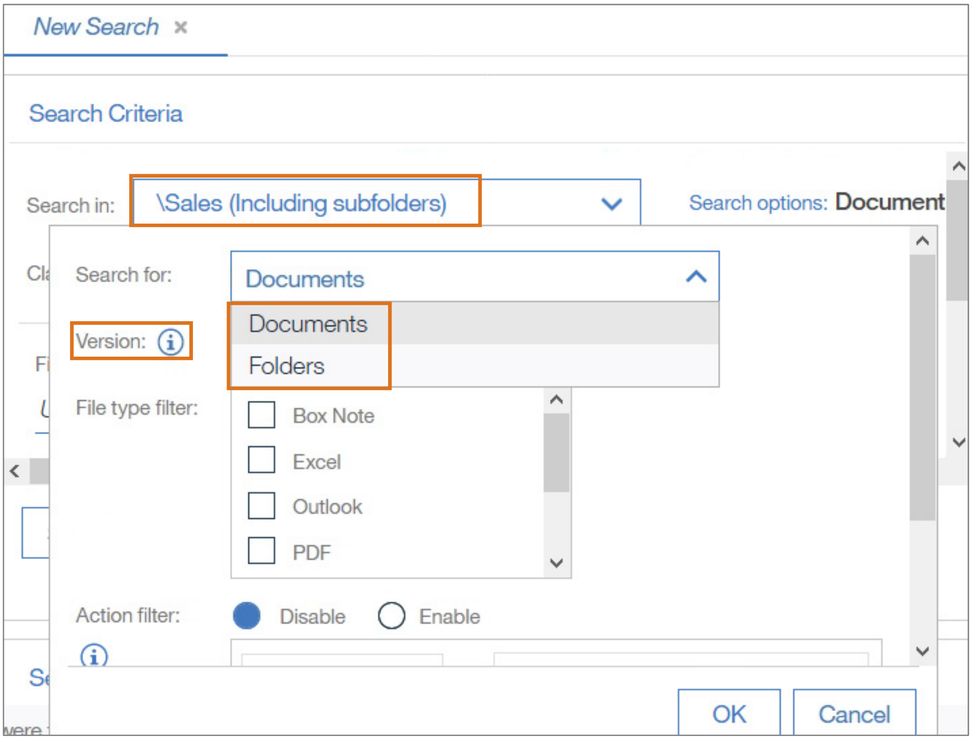
Search criteria: Repository folders and type of items



Introducing IBM Content Navigator

Figure 1-29. Search criteria: Repository folders and type of items

The screen capture shows a New Search tab in IBM Content Navigator for a repository.

By default, IBM Content Navigator searches the entire repository.

- You can limit the search to specific folders in a repository.
- With the search options, you can further narrow the search to a particular type of item: Documents or folders.
- If you are searching for documents, you can also limit which document versions do you want to search.

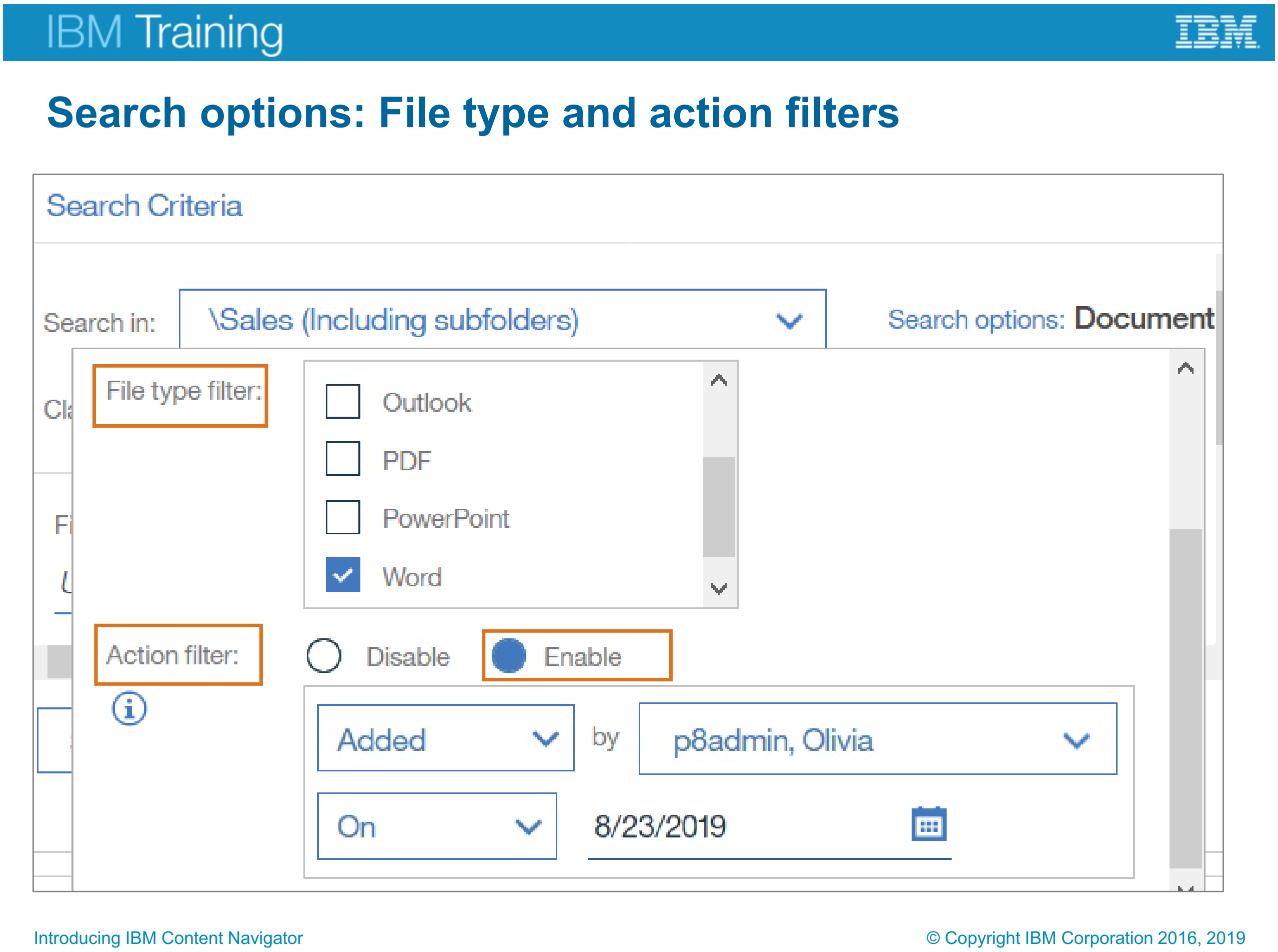


Figure 1-30. Search options: File type and action filters

The screen capture shows the search filters available for the documents in IBM Content Navigator. With the search options, you can set filters for file types and certain actions.

File types

- Examples: Word, Excel, PowerPoint, Outlook, Box Note, and PDF

Actions

- You can filter the search by the persons who added, checked out, or modified the documents, and the date on which these actions occurred.
- You can enable or disable the action filter.

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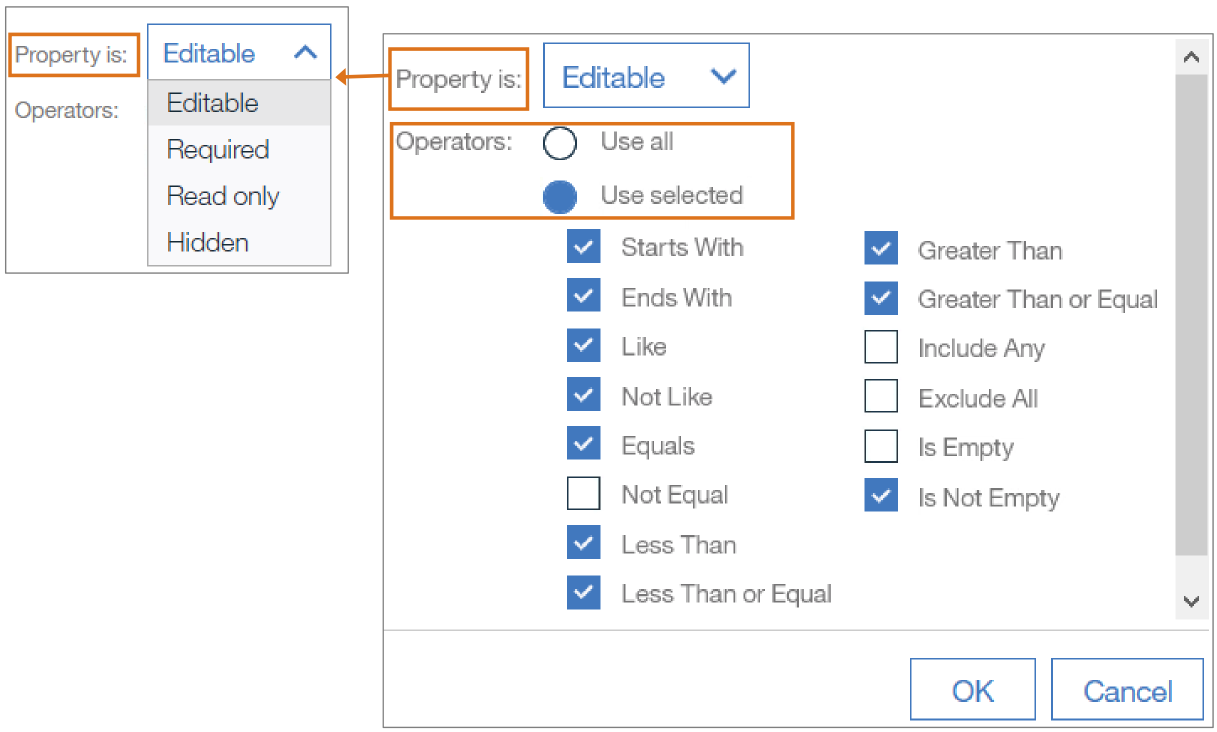
Search criteria: Property-based search



Introducing IBM Content Navigator

Figure 1-31. Search criteria: Property-based search

The screen captures show the options for document property status on the left and operators on the right that are available for search in IBM Content Navigator.

Property status

- For the `Property is` field, the following options are available: Editable, Required, Read only, Hidden
- If a parameter is marked as Read only, it is displayed with the value that is assigned to it when the search is opened. Neither the operator nor the assigned value can be altered.

Operators

- Click the Use selected option and then choose the operators that you want to be allowed for search.
- When the operators are limited, an icon for Operators that are filtered is shown near the property criteria.

The search options can be used with the following repository types:

- IBM FileNet Content Manager
- IBM Content Manager (including child components)

The search options cannot be used in cross-repository searches, even if the only repository types in the search are IBM FileNet Content Manager and IBM Content Manager.

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Save a Search for future use

- You can save a search in the repository for a future use.

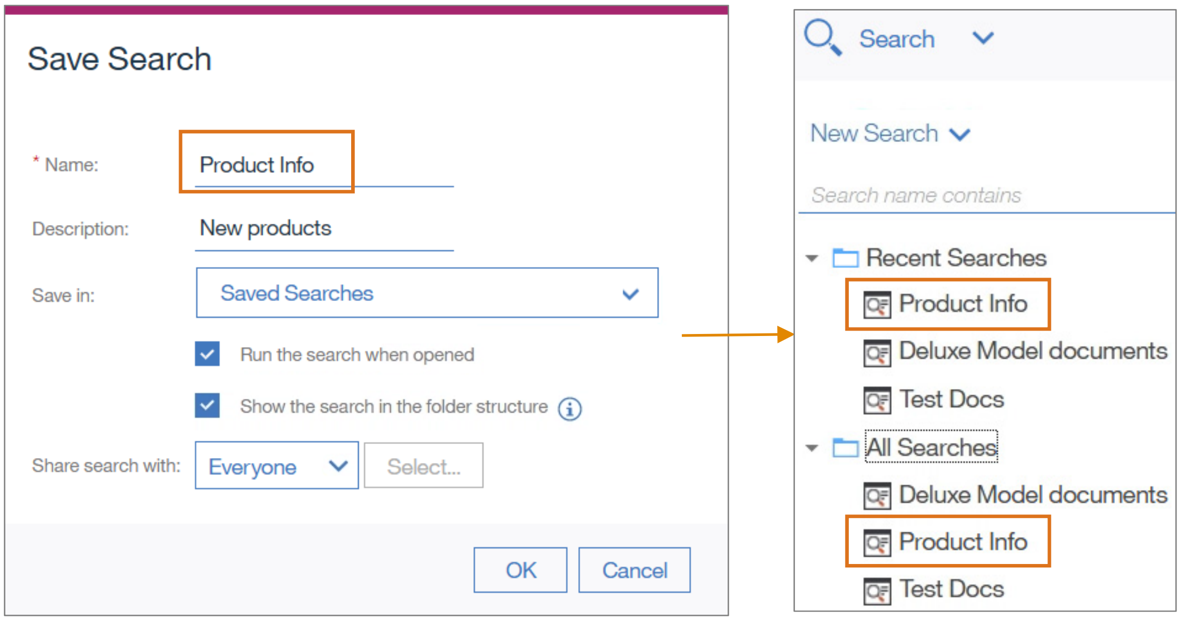

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Figure 1-32. Save a Search for future use

The left screen capture shows the Save Search dialog box.

The right screen capture shows a list of saved searches in IBM Content Navigator. The saved search is listed in Recent Searches and All searches on the Search page.

You can save a search in the repository for a future use.

- Provide a name
- Specify a folder in a repository to store the search
- Grant permission to other users to run this search

  You can share the search with every one or selected users)
- Select the options to run the search when opened and to show the search in the folder structure

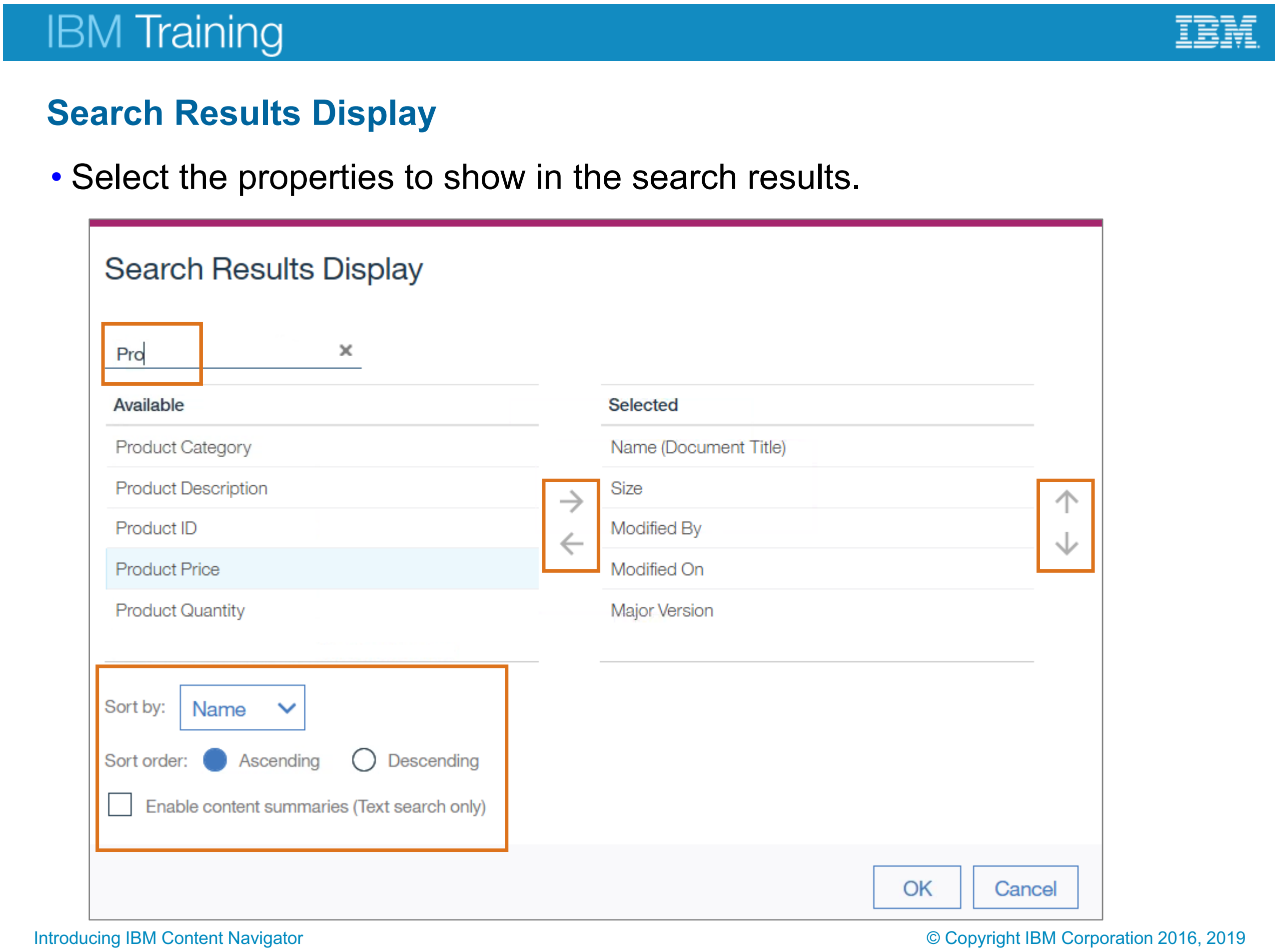

Figure 1-33. Search Results Display

The screen capture shows the Search Results Display page. You can configure the document properties that you want to show in the search results. The available properties depend on the items you are searching (documents or folders). It also depends on the class of the item.

- Use the forward and backward arrow controls to move the properties from the Available pane to Selected pane.
- Use the up and down arrow controls to change the properties order.
- Select the following options:
  - Sort the results by which property
  - Sort order (Ascending or Descending)
  - Do you want to enable content summaries (for Text search only)

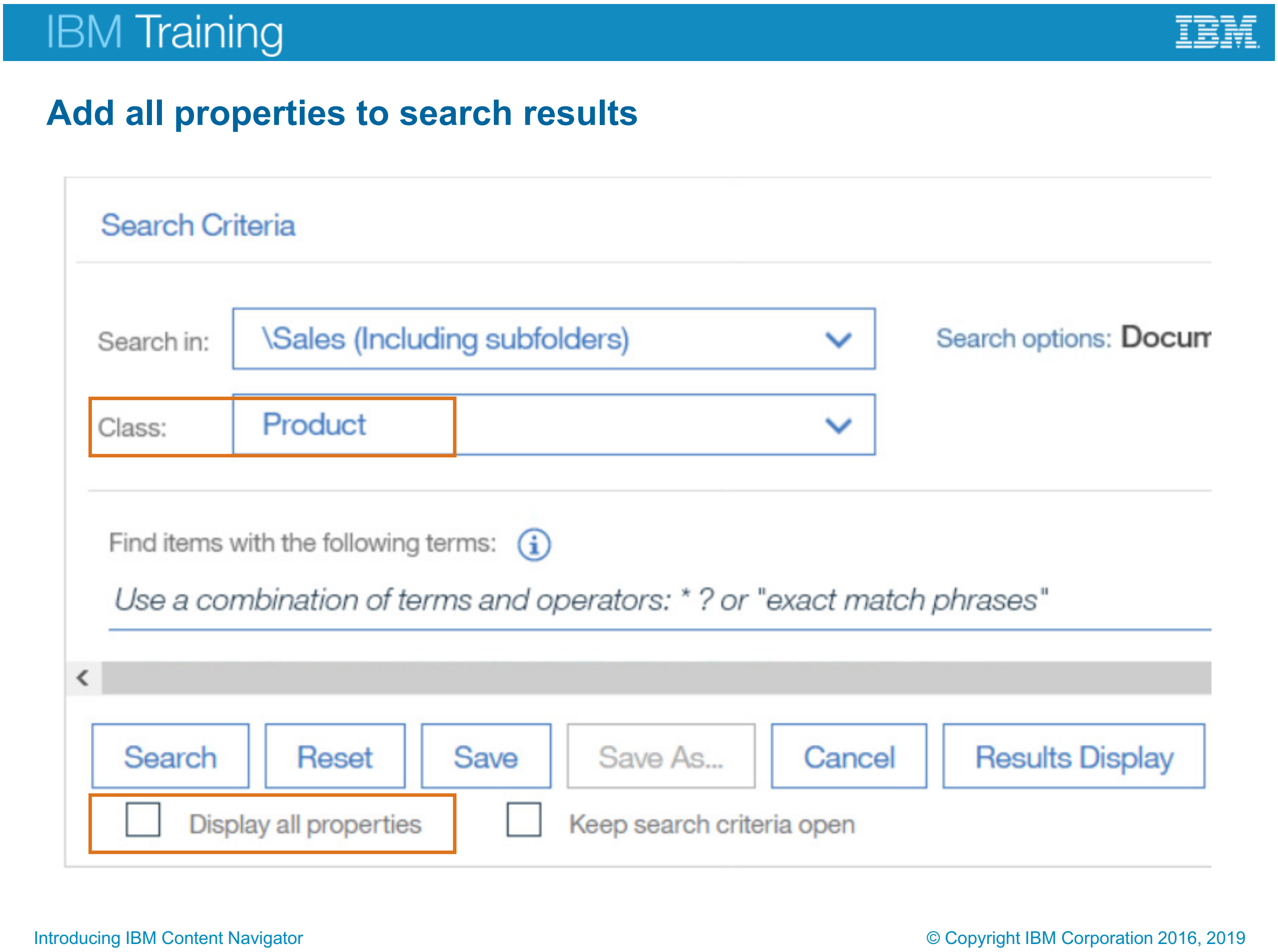

Figure 1-34. Add all properties to search results

The screen capture shows the option to display all properties in the search result columns.

You can configure to add all the properties that are associated with an item type or a document class as search result columns.

- For performance reasons, the check box is not available when you search on all subclasses of a class.
- Using the Search Results Display option that was shown on the previous slide and the display all properties check box are mutually exclusive. Only one of them can be used in a search. If you enable the display all properties check box, you need to resubmit the search. Refreshing the search results alone does not cause all properties to be returned.
- The use of the display all properties check box is not saved when you save the search.

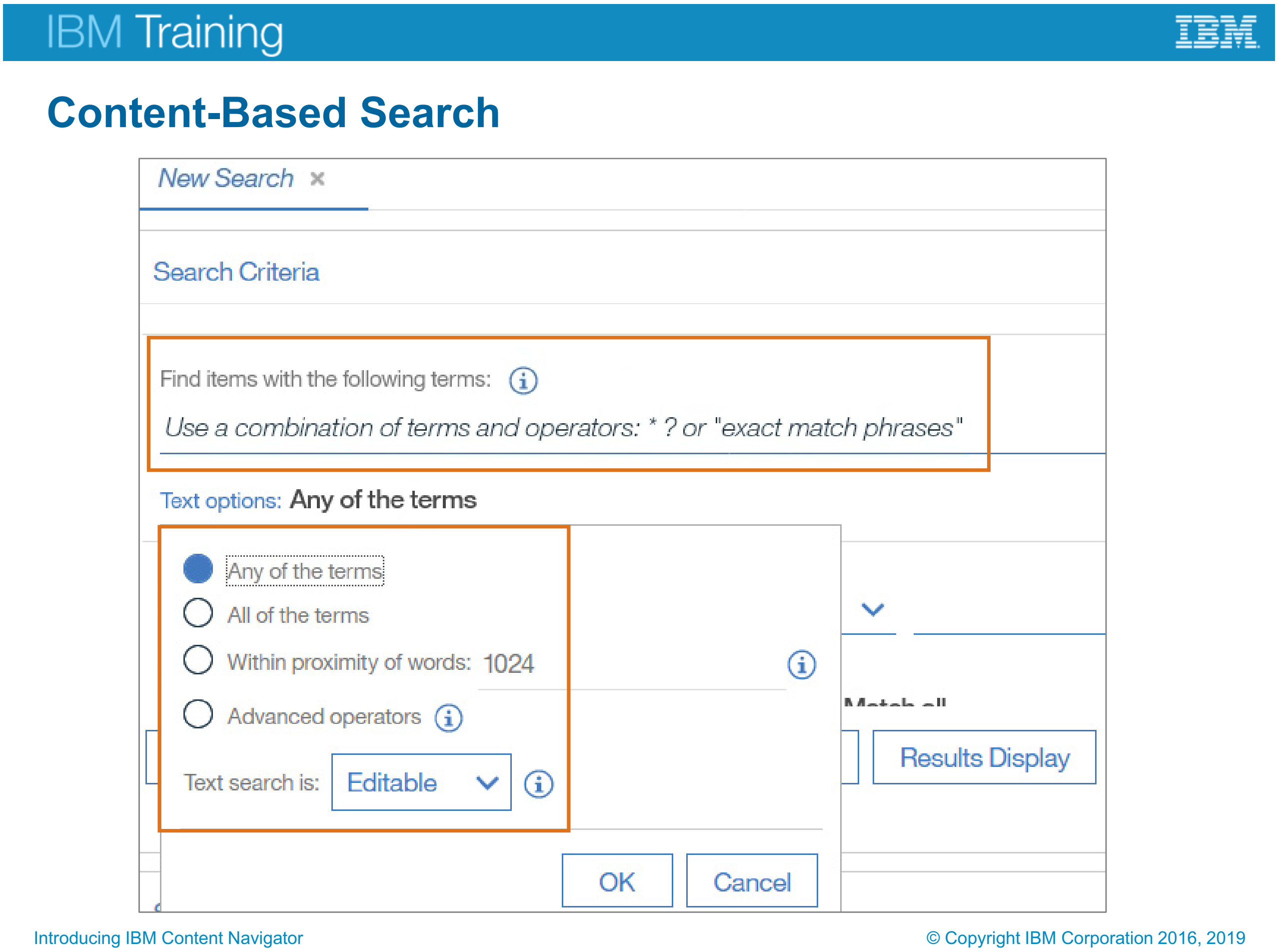

Figure 1-35. Content-Based Search

The screen capture shows a New Search in IBM Content Navigator. Content-based search and text options are highlighted.

Enter a term

- Combination of terms
- Operators
- Exact phrase

  Use quotation marks around the phrase

Text options

- Any of the terms
- All of the terms
- Within the proximity of words
- Operators

Text search parameter

- Like for the Property, the following settings are available for Text search parameters: Editable, Required, Read only, Hidden

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Text Search Options

- Search with terms
- Search for exact match of the phrases
  - Surround a name or phrase with double quotation marks (") to return search results that contain that exact phrase.
- Search with Boolean operators: AND, OR (default), and NOT
- Search for unknown or variable characters or terms
  - Wildcard characters: asterisk (*) or question mark (?)
- Excluding terms
  - Use the minus sign (-) to exclude items that contain certain terms.

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Figure 1-36. Text Search Options

Search with terms

- You can use text to narrow your searches and return more specific results.
- Search for exact matches, use phrases, or wildcard characters.
- Example: Searching for Human Resources results in items that contain either Human or Resources.

Search for exact match of the phrases

- Surround a name or phrase with double quotation marks (“) to return search results that contain that exact phrase in the order that the words are shown in the query.
- Example: Searching for “Sociology 101" results in items that contain History and Sociology 101, but not Sociology and History 2015
- Example scenario:

  You want to see documents with the phrase credit card fraud 2012. You do not want matches for fraud that was committed in 2011 or earlier. For query, enclose the query text inside double quotation marks.

  - Term variants, such as credit cards and credit card frauds, are not considered matches for exact match search.

- The query “credit card fraud 2012" does not match credit card frauds 2012.
- No other terms can appear between any two terms in the phrase, so credit card online fraud 2012 does not match.
- The search is not case-sensitive, so it matches Credit Card Fraud 2012.
- Punctuation is ignored, so credit card, fraud 2012 matches.

Search with Boolean operators: AND, OR (default), and NOT

Examples:

- Searching for Training AND Development results in items that contain both Training and Development
- Searching for Training OR Development results in items that contain either Training or Development
- Searching for Training NOT Development results in items that contain the word Training, but not Development

Search for unknown or variable characters or terms

Wildcard characters are useful when you are not sure of the spelling, exact name, or variations of a term.

- Use the asterisk (*) to match none or multiple characters, but only one term.

  Example:

  The query Austral* returns documents with the terms Australia, Australian, and other words that start with the characters Austral, including the word Austral without any following characters.

- Use the wildcard characters in a phrase search.

  Example:

  The query John * Kennedy returns documents with the terms John Fitzgerald Kennedy and John F Kennedy.

- Use the question mark (?) for a single character.

  Example:

  The search term ra?or matches razor or rasor, but not raptor.

- Use multiple question marks in a row to denote the same number of characters as there are question marks.

  Example:

  The search term psych????y matches either psychology or psychiatry but not psychotherapy.

Excluding terms

Use the minus sign (-) to exclude items that contain certain terms. The minus sign (-) applies to a term and its variants.

Example:

- To find Documents and images about the original Star Trek series and not about Voyager and Star Trek: The Next Generation, enter the following query in the search box: Star Trek -Voyager -”Next Generation”

1.5. Merge and split documents

IBM Training

Merge and split documents

Introducing IBM Content Navigator

Figure 1-37. Merge and split documents

IBM Training

Merge and split documents

- Rotate, cut, and copy one or more pages from existing documents and paste them to a new document or to a different existing document
- After merge and split, save as a new document

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Figure 1-38. Merge and split documents

IBM Training

Supported configurations

- Supported repositories
  - IBM FileNet Content Manager
  - IBM Content Manager
- Supported file types
  - PDF and TIFF documents
- Other configurations
  - Merge and split documents must be from the same repository
  - PDF and TIFF file types must be mapped to view in the Daeja ViewONE Virtual viewer (Default)
  - Properties and comments panes are unavailable in Viewer

Introducing IBM Content Navigator

Figure 1-39. Supported configurations

IBM Training

Desktop configuration

- Enable Merge and Split in the Desktop configuration
- Select the option to display the check-in dialog box when users check in the merge and split changes

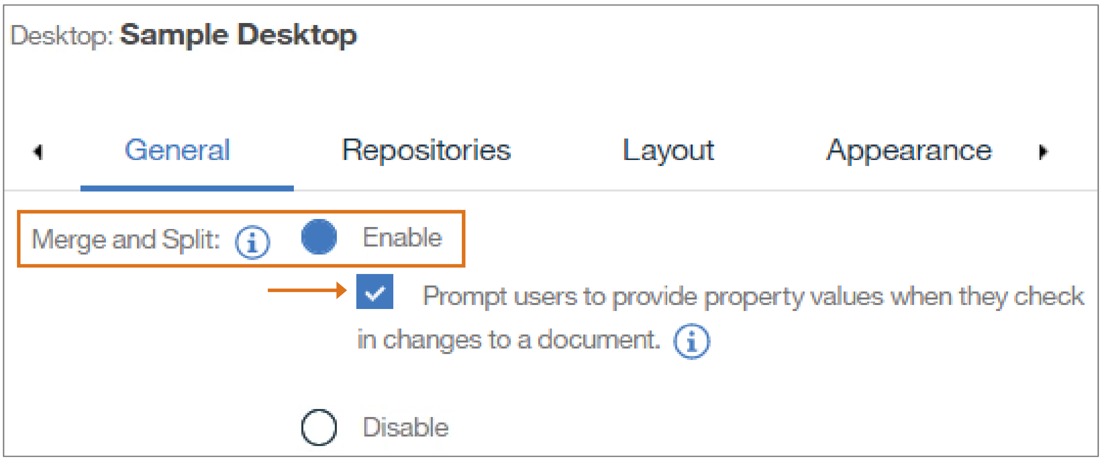

Figure 1-40. Desktop configuration

The screen capture shows the merge and split configuration for a IBM Content Navigator desktop.

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Repository configuration

- If the role-base redactions feature is enabled, allow users to merge and split pages with role-based redactions

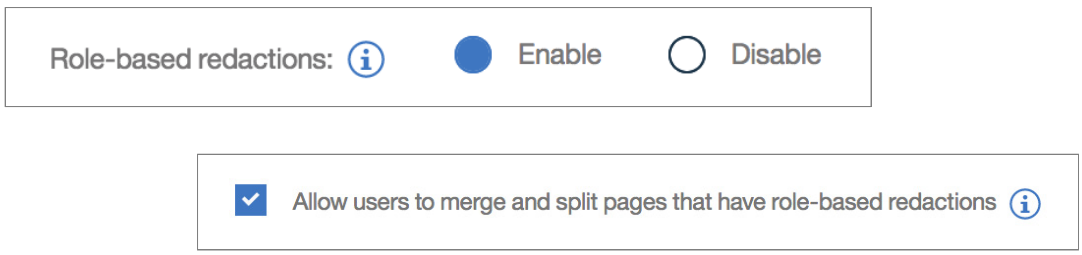

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Figure 1-41. Repository configuration

The screen capture shows the configuration for role-based redactions and merge-split permissions for the redactions.

Users who are not redaction editors are not able to edit role-based redactions. They are not granted access to the sensitive data associated with the role-based redactions even if this option is enabled.

You are going to learn more about role-based redaction in another unit of this course.

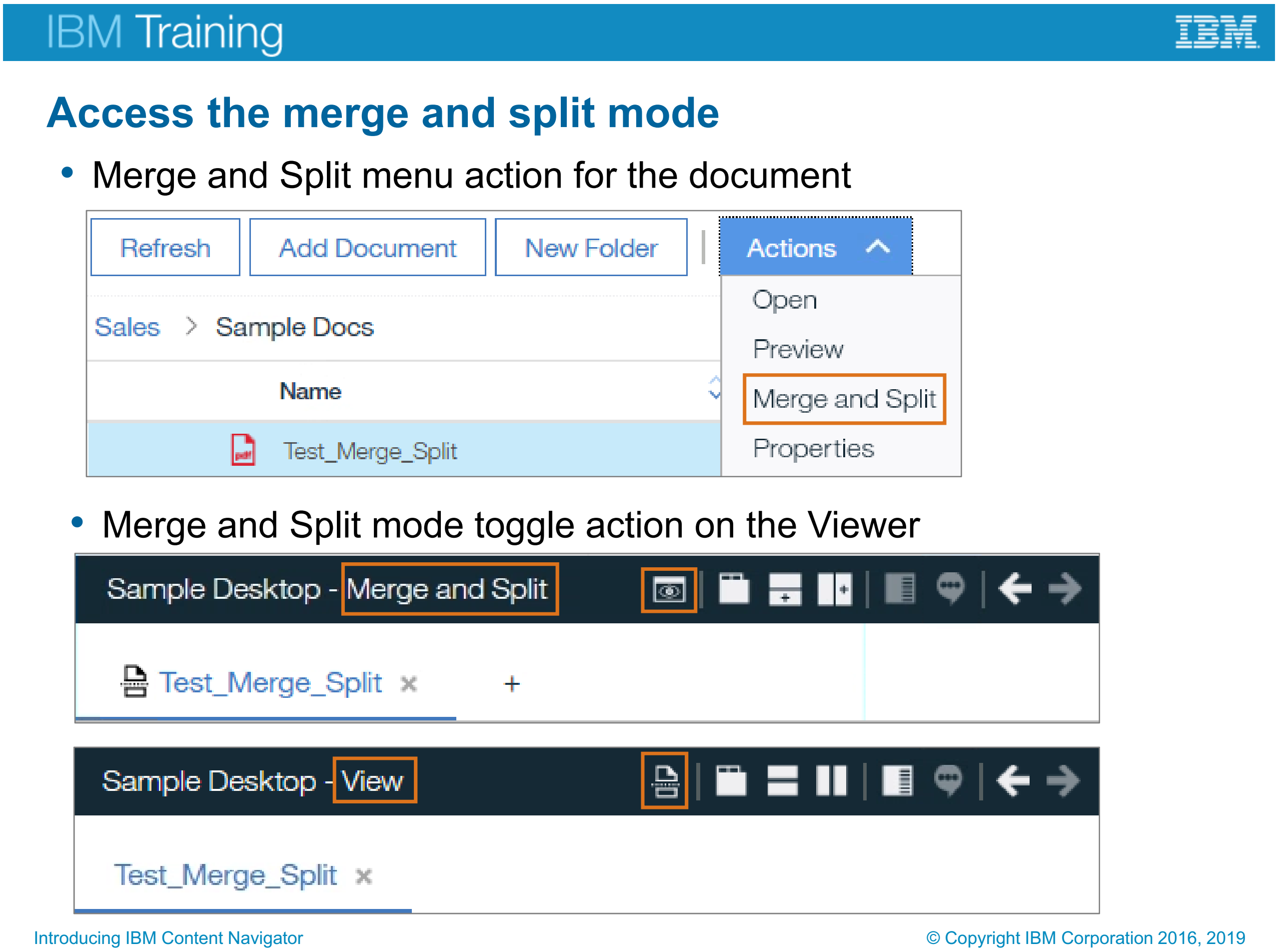


Figure 1-42. Access the merge and split mode

The top screen capture shows the Merge and Split action on the Actions menu (top). The next two screen captures show the Viewer in Merge and Split mode (middle) and in View mode (bottom). You can use the toggle icon on the viewer to switch to either mode.

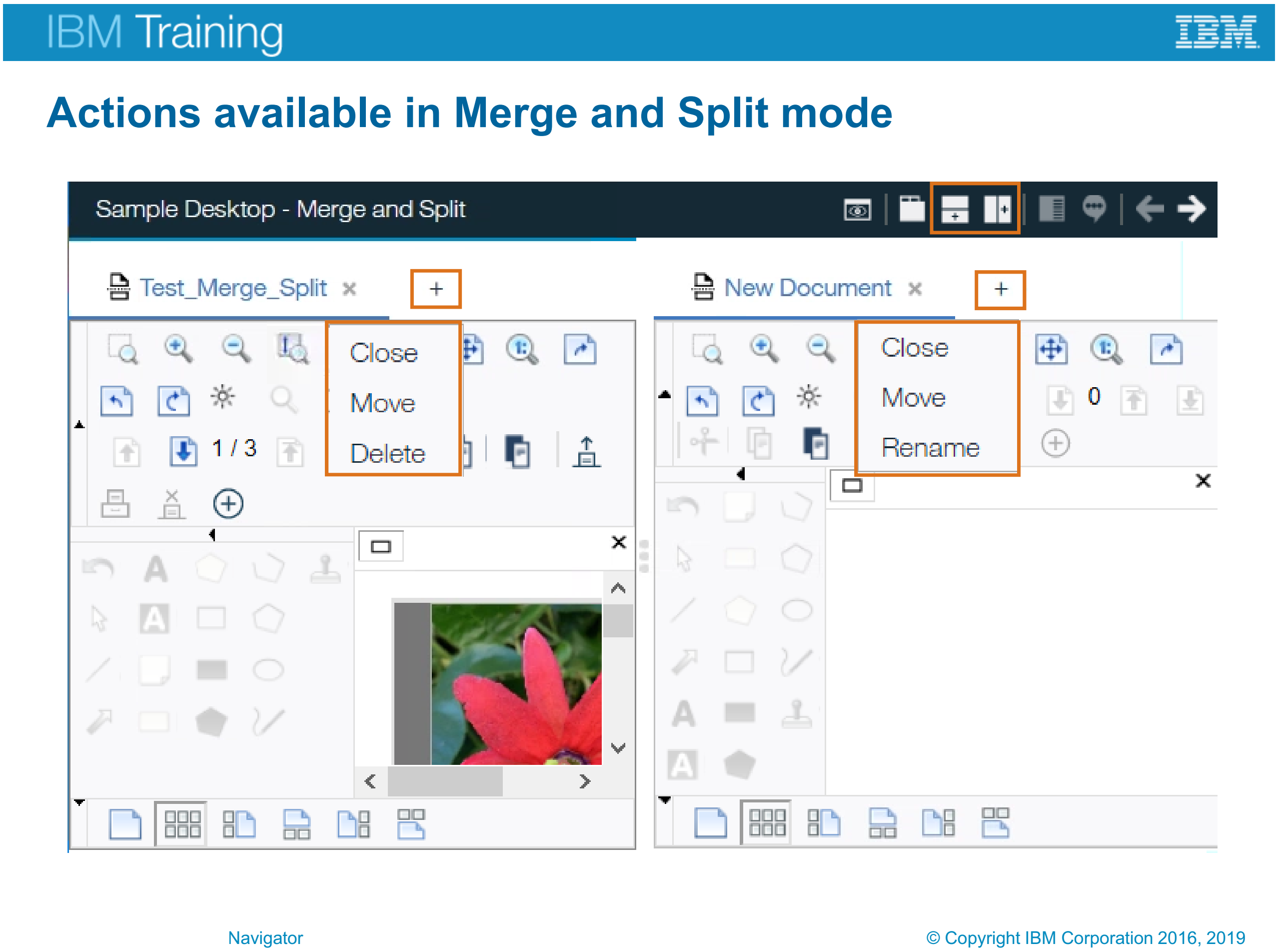


Figure 1-43. Actions available in Merge and Split mode

The screen capture shows the Viewer page for a document in merge and split mode. The following options are highlighted:

- Icons on the banner - Options to add a tab at the bottom of the page or on the side
- Plus sign next to the title - Add new tabs to the main or split panes
- Container actions for the source and new documents

In merge and split mode, you can:

- Add new tabs to the source document pane or split pane where new document is created
- Move tabs to the main or split pane
- Rename titles of new tabs
- Delete source documents from the repository

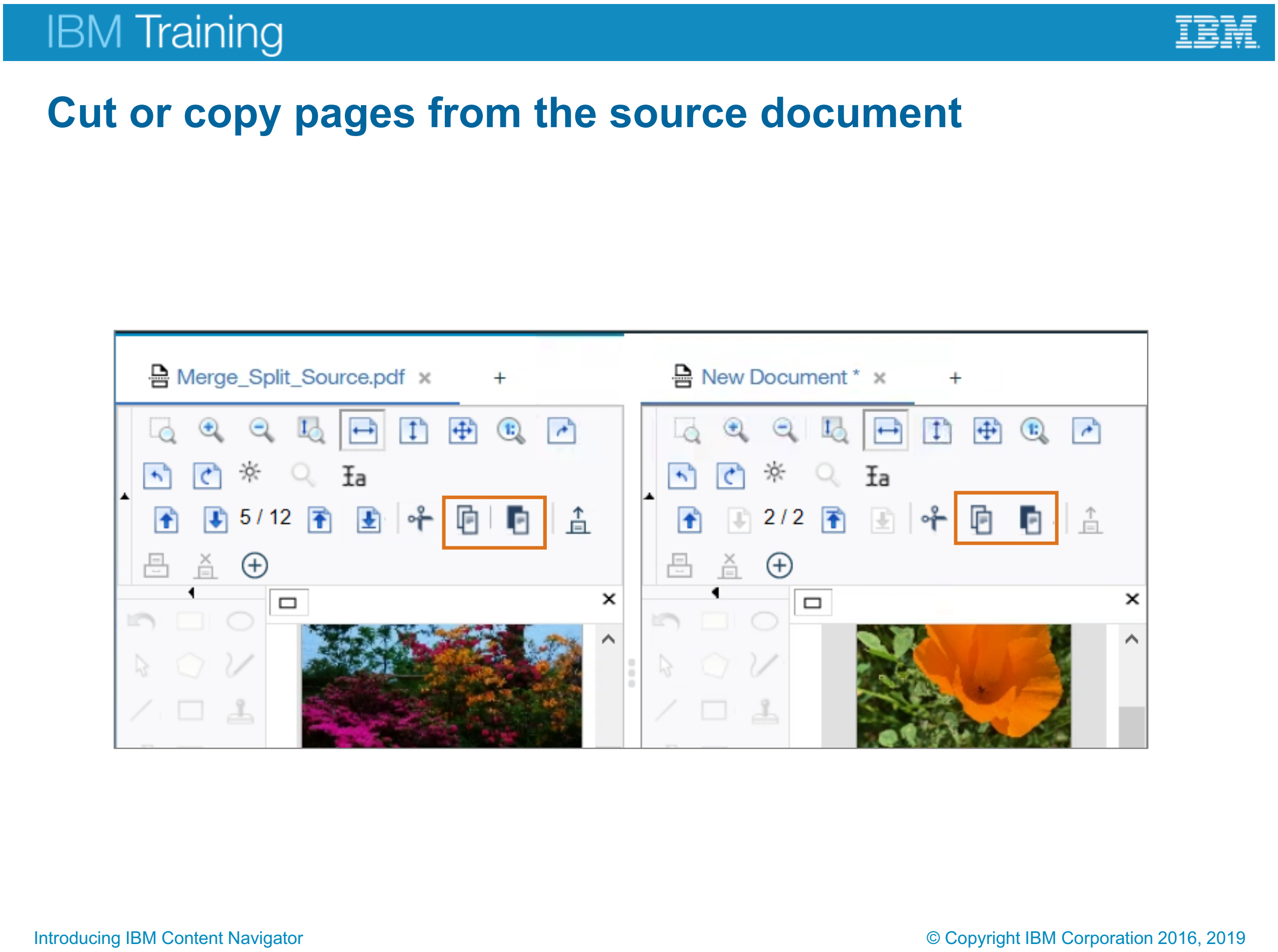


Figure 1-44. Cut or copy pages from the source document

The screen capture shows the Viewer page for a document in merge and split mode. The copy and paste icons on the toolbar are highlighted.

- Click a page to select or press control + ‘a’ to select all pages
- Use control and shift keys to select multiple pages
- Click the Cut icon or press control + ‘x’ to cut or delete pages
- Click the Copy icon or press control + ‘c’ to copy pages
- Rotated pages are cut as rotated

Paste pages to the destination document:

- Click the Paste icon or press control + ‘v’ to paste pages
- Pages are pasted after the last selected page
- Click the space before the first page to insert pages to the beginning
- Any existing annotations are pasted along with the pages

You can paste TIFF and PDF pages across documents. When you save the new version or the new document, you can choose the option to save as PDF or TIFF.

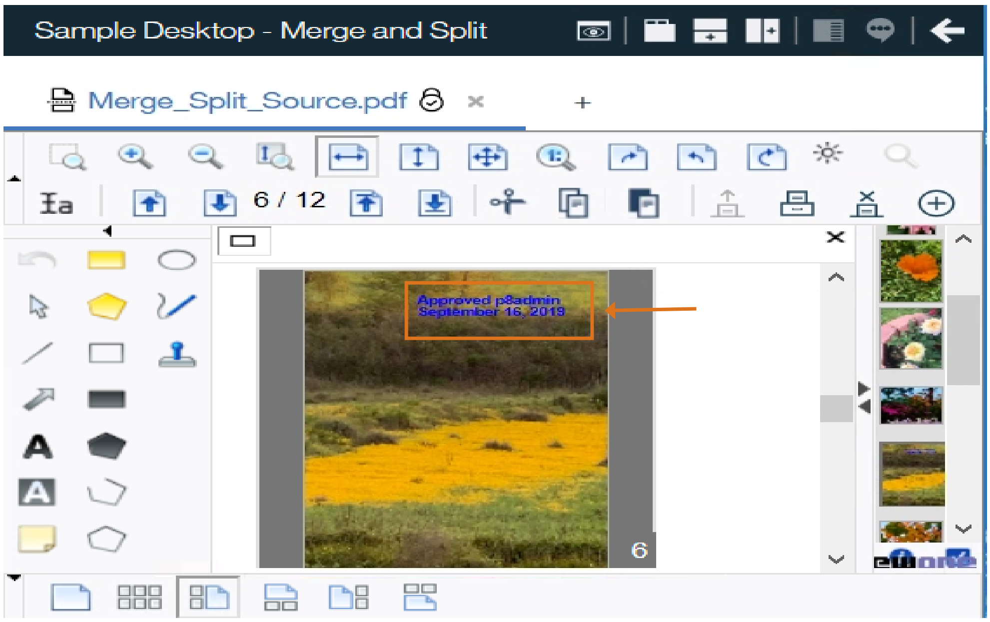
If the document is in a mixed mode, the default save option is PDF.

Any redactions move with the document pages and Role-based redaction is always enforced. Role-based redaction topic is discussed in a later lesson.

IBM Training

Edit annotations

- Annotations can be edited from the page view



Introducing IBM Content Navigator

Figure 1-45. Edit annotations

The screen capture shows the Viewer page for a document in merge and split mode. The document is opened in the page view and annotation is high-lighted.

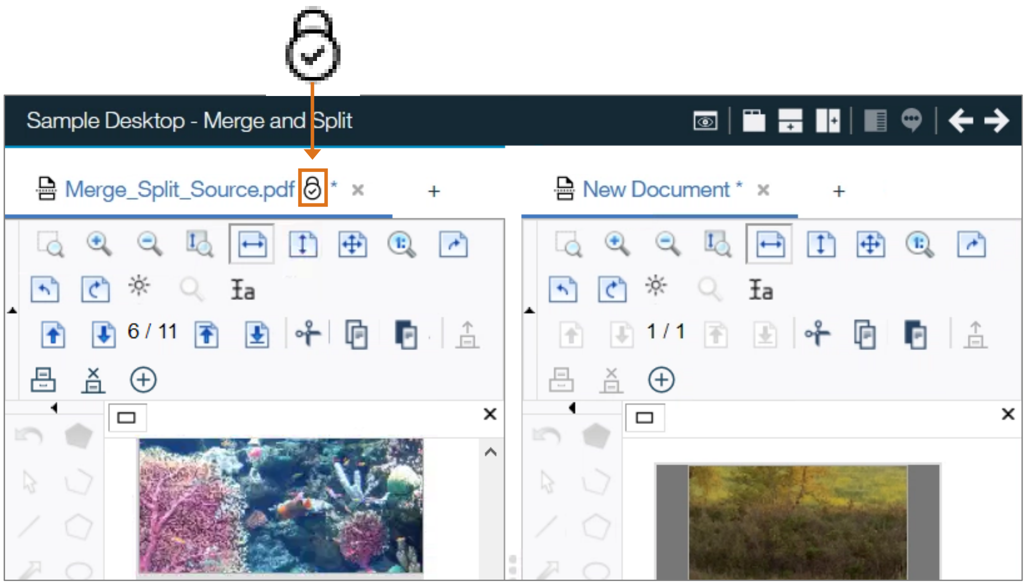
The Save annotation changes icon is hidden. Edited annotations are saved when the document is added or checked in.

Users who are not redaction editors are not able to edit role-based redactions.

IBM Training

Document check out

- Document is checked out automatically when changes are made
- Checkout is cancelled when you exit the Viewer without saving changes
- A lock icon indicates that the document is checked out



Introducing IBM Content Navigator

Figure 1-46. Document check out

The screen capture shows the Viewer page for a document in merge and split mode. Checkout (lock) icon is highlighted.

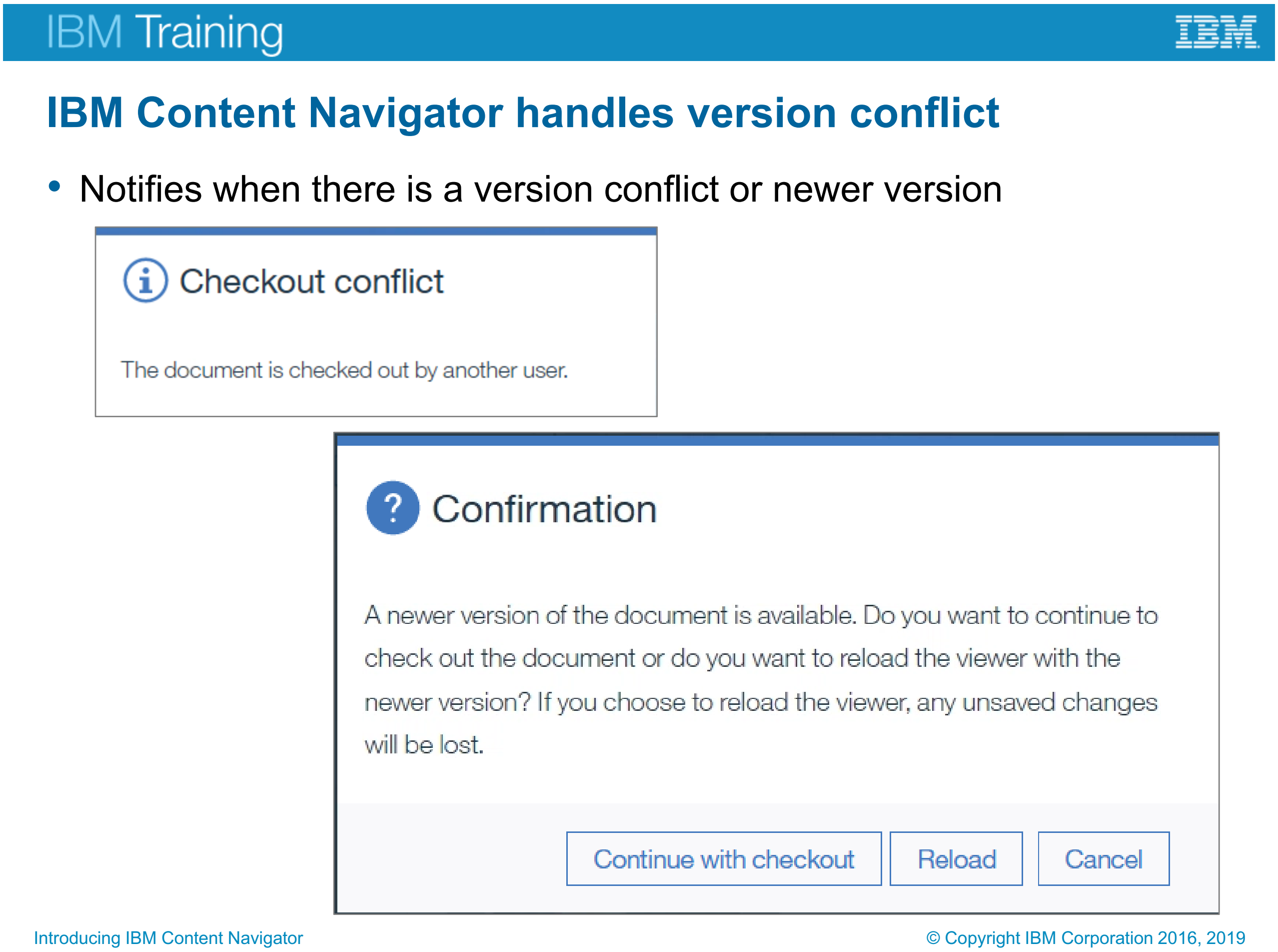


Figure 1-47. IBM Content Navigator handles version conflict

The screen capture shows the messages that are displayed when there is a version conflict (upper screen capture) or a new version (lower screen capture).

The changes can be added as a new document when there is a version conflict.

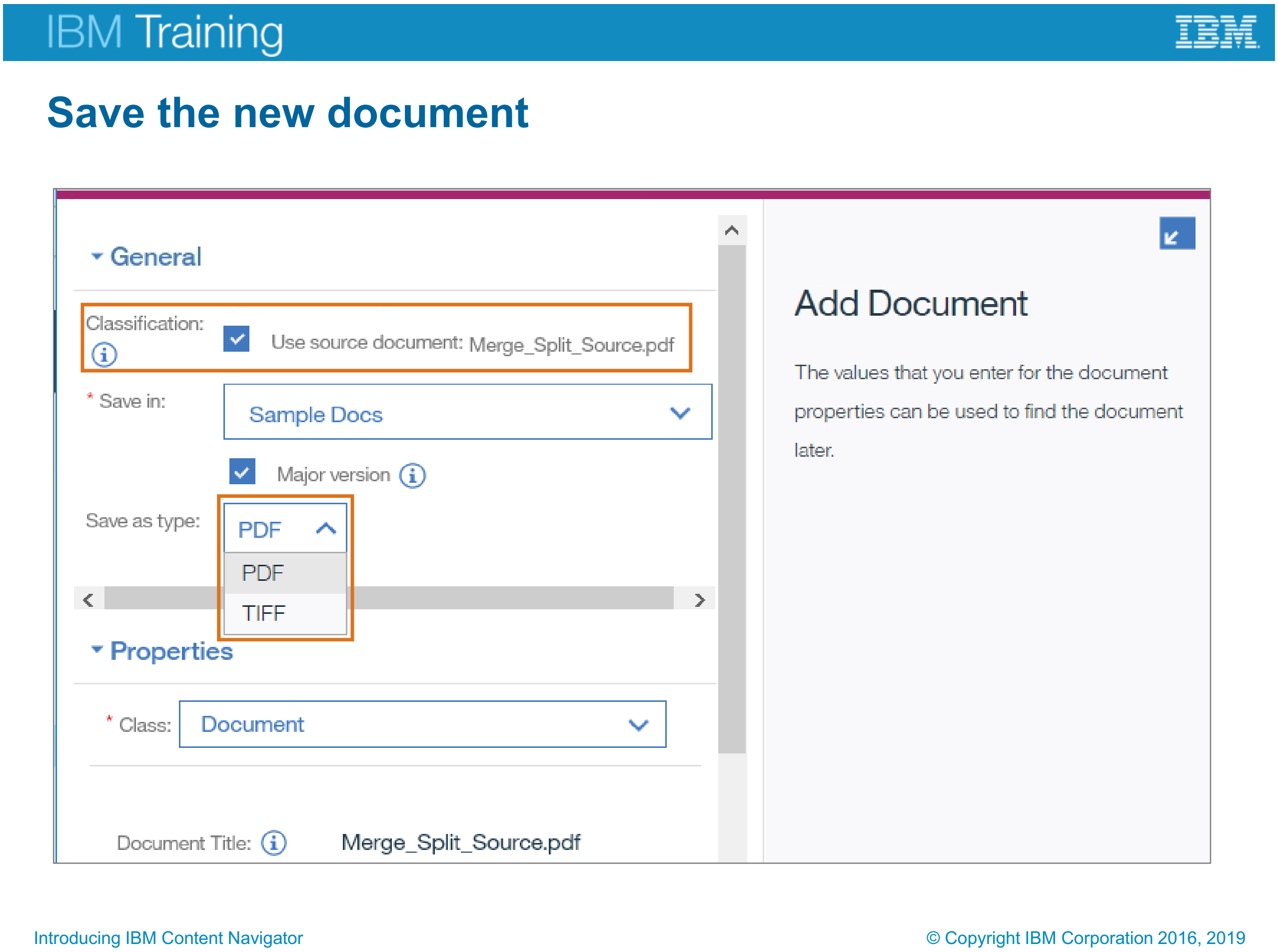


Figure 1-48. Save the new document

The screen capture shows the Add Document wizard for the new document. The following options are highlighted:

- Save as PDF or TIFF
- Use the source document for classification

After the merge and split of a document, you can choose to create a new version of the existing document or create a new document.

The generated new document from splitting of the source document is not linked to the original document. The new document is independent. But you can choose to use the source document for classification of the new document. The class and property values of the source is applied when you enable the feature. You can save either as PDF or as TIFF.

Document and folder entry template settings are recognized. You learn more about the entry template in a later unit.

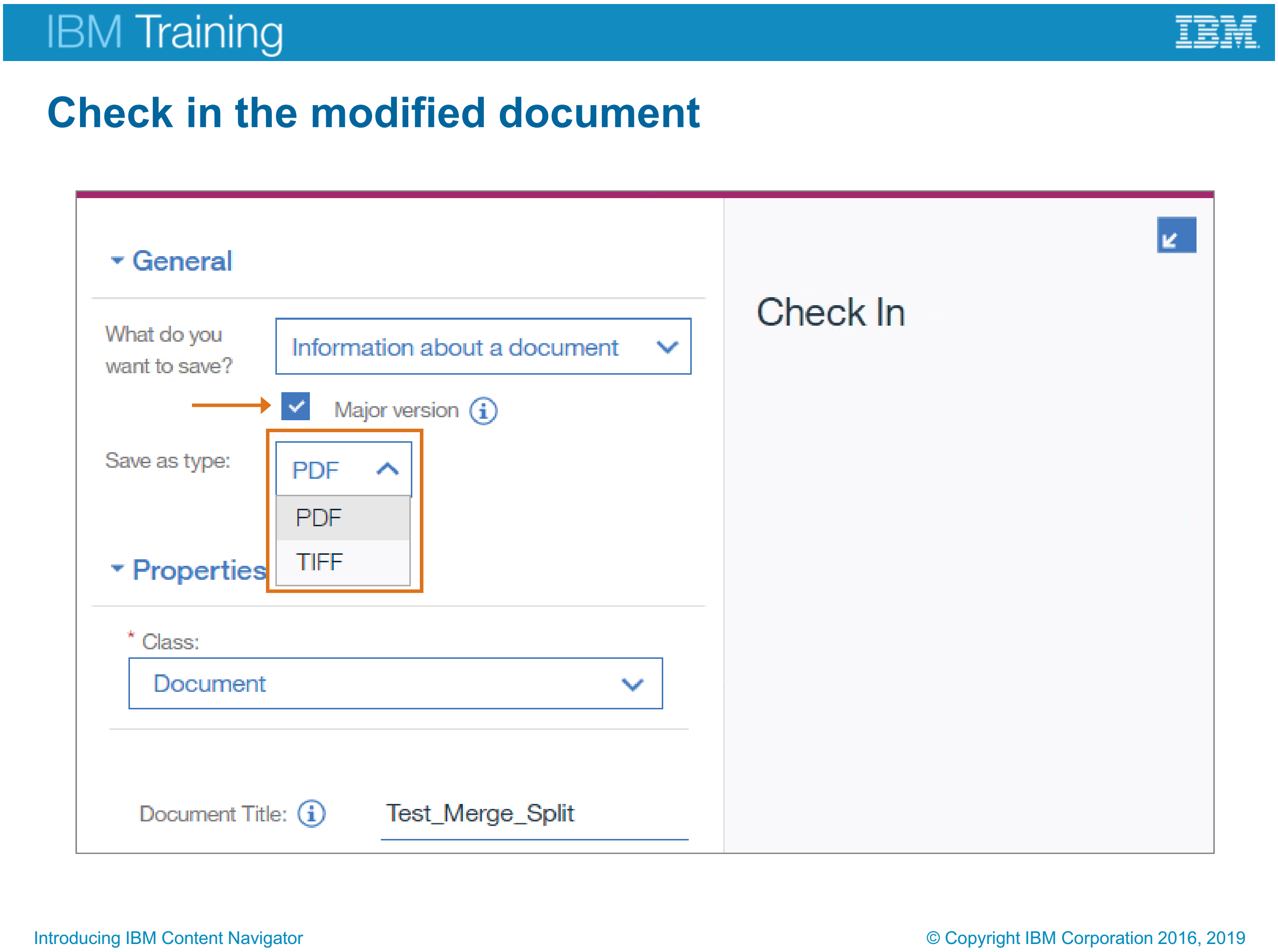


Figure 1-49. Check in the modified document

The screen capture shows the Check In wizard for the new version of the document. The following options are highlighted:

- Save as PDF or TIFF
- Check in as Major version

After the merge and split of a document, if you choose to create a new version of the existing document, you can check in the document. The check in dialog box is displayed if enabled in the desktop configuration.

You can save as either PDF or as TIFF.

You can choose to check in as a major version. When you select this option, it increments the document version number by one and sets the document status to Released. If the option is not selected, the document is checked in as a minor version.

The Sensitive Content property value is updated during check in or adds, if role-base redactions are added or removed. You learn more about the role-base redactions in a later unit.

IBM Training

Unit summary

- Identify the capabilities of IBM Content Navigator
- Describe the graphic user interface (GUI) elements in IBM Content Navigator
- Learn how to view and search for repository content, add content to repositories, and merge and split documents

Introducing IBM Content Navigator

Figure 1-50. Unit summary

IBM Training

Review questions

1. Which of the following features are part of an IBM Content Navigator desktop? (Choose three)
   A. Browse
   B. Search
   C. Code Modules
   D. Teamspaces
   E. Data Studio

2. Which of the following items are IBM Content Navigator supported repositories? (Choose two)
   A. IBM MQ key repositories
   B. IBM FileNet Content Manager
   C. IBM Wave Linux repositories
   D. IBM Content Manager

3. True or False: You can use text or object properties as search criteria to find documents in IBM Content Navigator.

Introducing IBM Content Navigator

Figure 1-51. Review questions

Write your answers here:

1.

2.

3.

IBM Training

Review answers

1. Which of the following features are part of an IBM Content Navigator desktop? (Choose three)
   A. Browse
   B. Search
   C. Code Modules
   D. Teamspaces
   E. Data Studio
   The answer is A, B, and D.
2. Which of the following items are IBM Content Navigator supported repositories? (Choose two)
   A. IBM MQ key repositories
   B. IBM FileNet Content Manager
   C. IBM Wave Linux repositories
   D. IBM Content Manager
   The answer is B and D.
3. True or False: You can use Text or object properties as search criteria to find documents in IBM Content Navigator.
   The answer is True.

Introducing IBM Content Navigator

Figure 1-52. Review answers

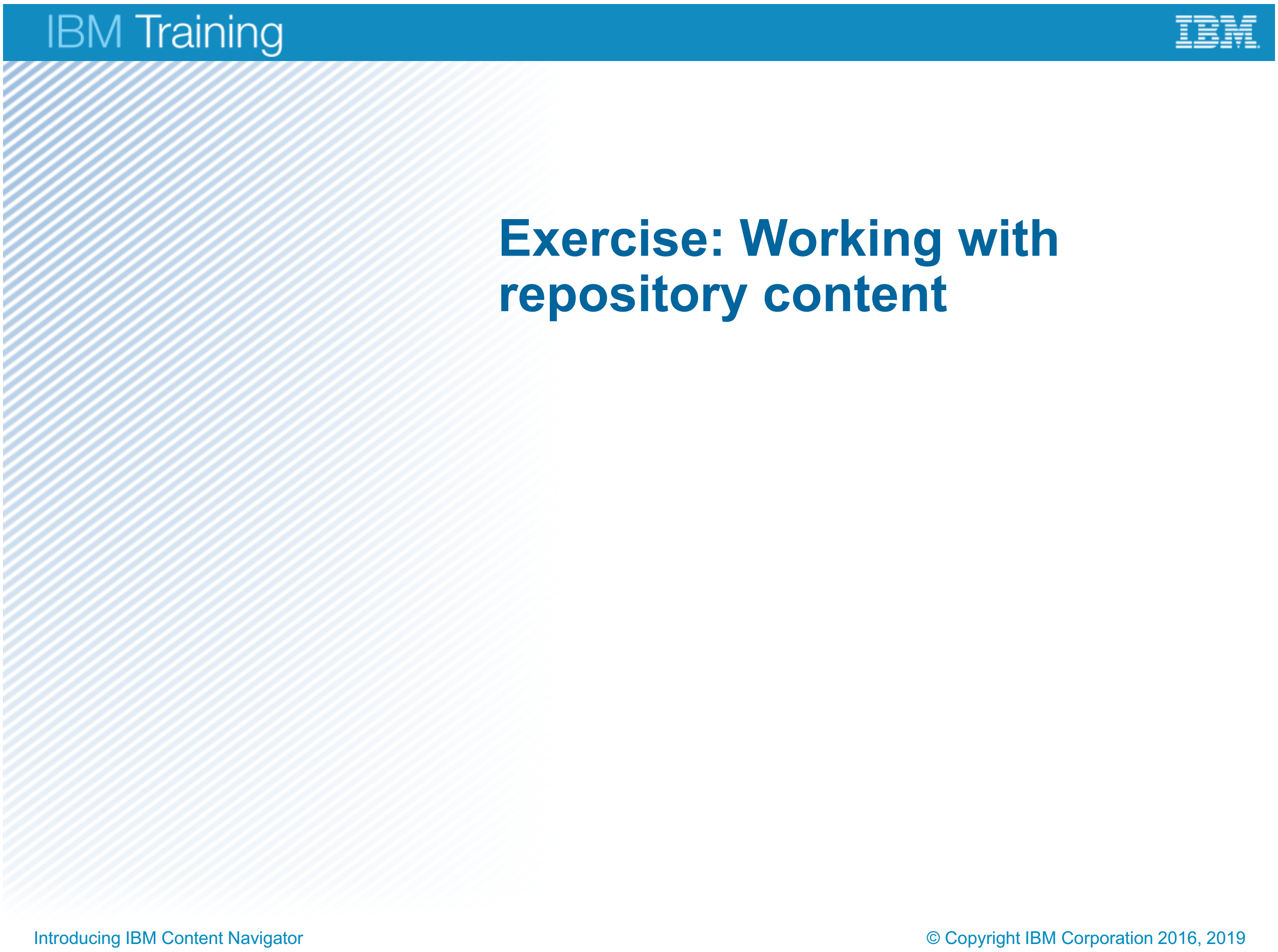


Figure 1-53. Exercise: Working with repository content

IBM Training

Exercise objectives

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

Introducing IBM Content Navigator

Figure 1-54. Exercise objectives

Unit 2. IBM Content Navigator Configuration

Estimated time

02:00

Overview

This unit teaches you how to configure various components for an IBM Content Navigator desktop

How you will check your progress

- Review
- Exercise

References

https://www.ibm.com/support/knowledgecenter/SSEUEX_3.0.6/KC_ditamaps/contentnavigator.htm

IBM Training

Unit objectives

- Learn about IBM Content Navigator administration tool
- 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

IBM Content Navigator Configuration

Figure 2-1. Unit objectives

IBM Training

Topics

- IBM Content Navigator administration tool
- Configure a repository
- Create an IBM Content Navigator desktop
- Define a cross-repository search
- Create a teamspace and a template
- Configure role-based desktop administration

IBM Content Navigator Configuration

Figure 2-2. Topics

2.1. IBM Content Navigator administration tool

Figure 2-3. IBM Content Navigator administration tool

IBM Training

Topics

- IBM Content Navigator administration tool
- Configure a repository
- Create an IBM Content Navigator desktop
- Define a cross-repository search
- Create a teamspace and a template
- Configure role-based desktop administration

IBM Content Navigator Configuration

Figure 2-4. Topics

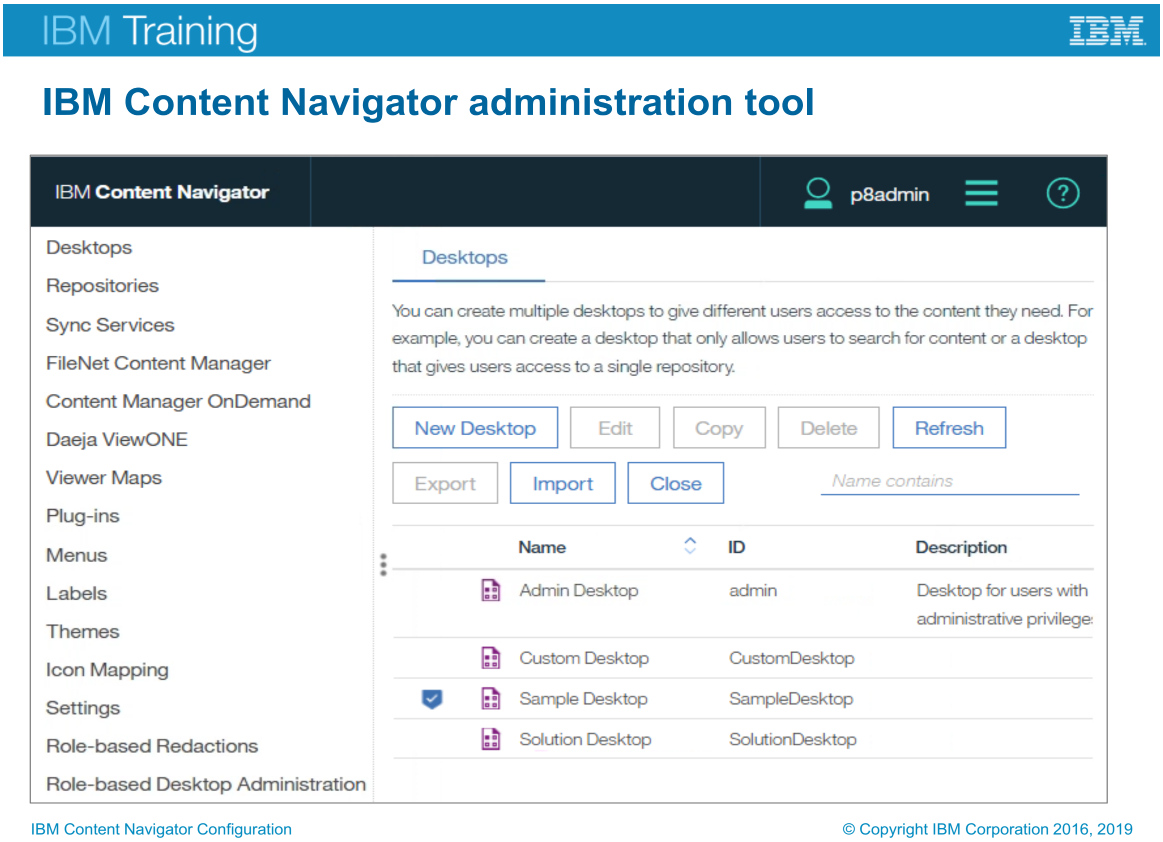


Figure 2-5. IBM Content Navigator administration tool

The screen capture shows the administration tool in IBM Content Navigator.

The desktop is provided for administering the web client. On the administration page, you configure the following items:

Desktops

- After you install and deploy IBM Content Navigator, you must configure the web client.
- By default, the only desktop that is included with IBM Content Navigator is the administration desktop.
- You must create at least one desktop for your users before they can access the web client.
- You can create multiple desktops to give different users access to content based on their roles.

Repositories

You must connect to and configure the repositories that you want to access in IBM Content Navigator.

Sync Services

If you plan to sync content across the devices, you must configure sync services and enable the sync service for the repositories.

Repository-specific configurations

- FileNet Content Manager
- Content Manager OnDemand

Daeja ViewONE

Configure features for your viewers and services.

Viewer Maps

Configure which viewers the web client uses to display different types of content.

Plug-ins

Register your custom plug-ins for the web client. You can extend and customize IBM Content Navigator with custom plug-ins that you create.

Menus, Labels, Themes, and Icon mapping

Customize the menus, labels, themes, and icons for the IBM Content Navigator client.

Settings

Configure administrative users, logs, and other settings.

Role-based Redactions

Configure role-based redactions (reasons, policies, and roles).

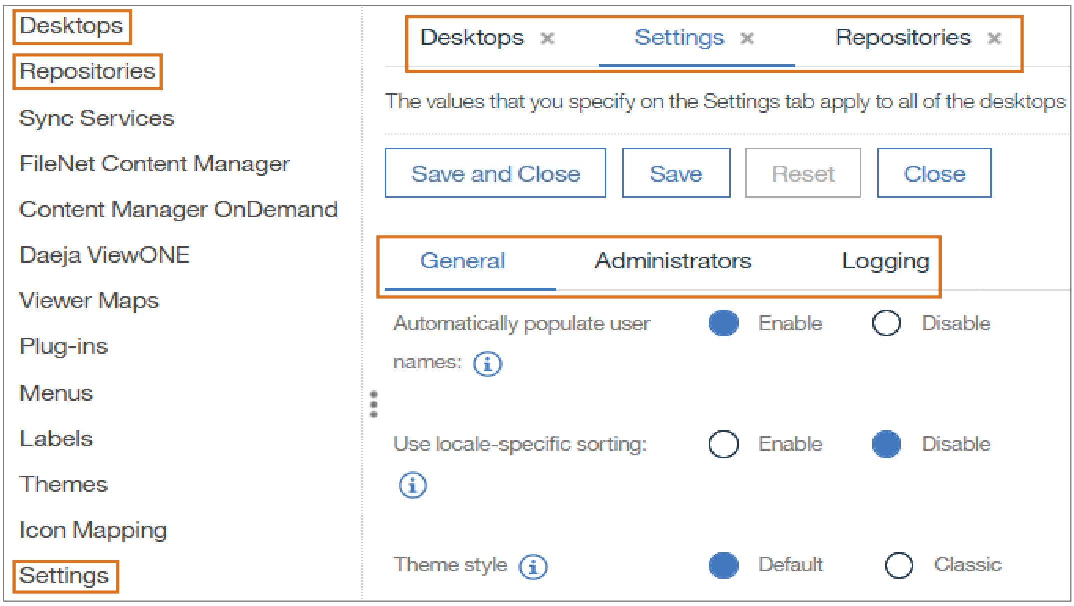
Role-based Desktop Administration

Create and manage desktop administrator roles.

IBM Training

The administration desktop user interface

- The desktop uses a tabbed interface to allow easy navigation.



IBM Content Navigator Configuration

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Figure 2-6. The administration desktop user interface

The screen capture shows the tabs and subtabs on the administration page of IBM Content Navigator. On the left pane, the tabs that are opened are highlighted. The Settings tab is active and its subtabs are shown.

The administration desktop access

- URL: http://<server>/navigator/?desktop=admin
- Only specified users can access the administration desktop

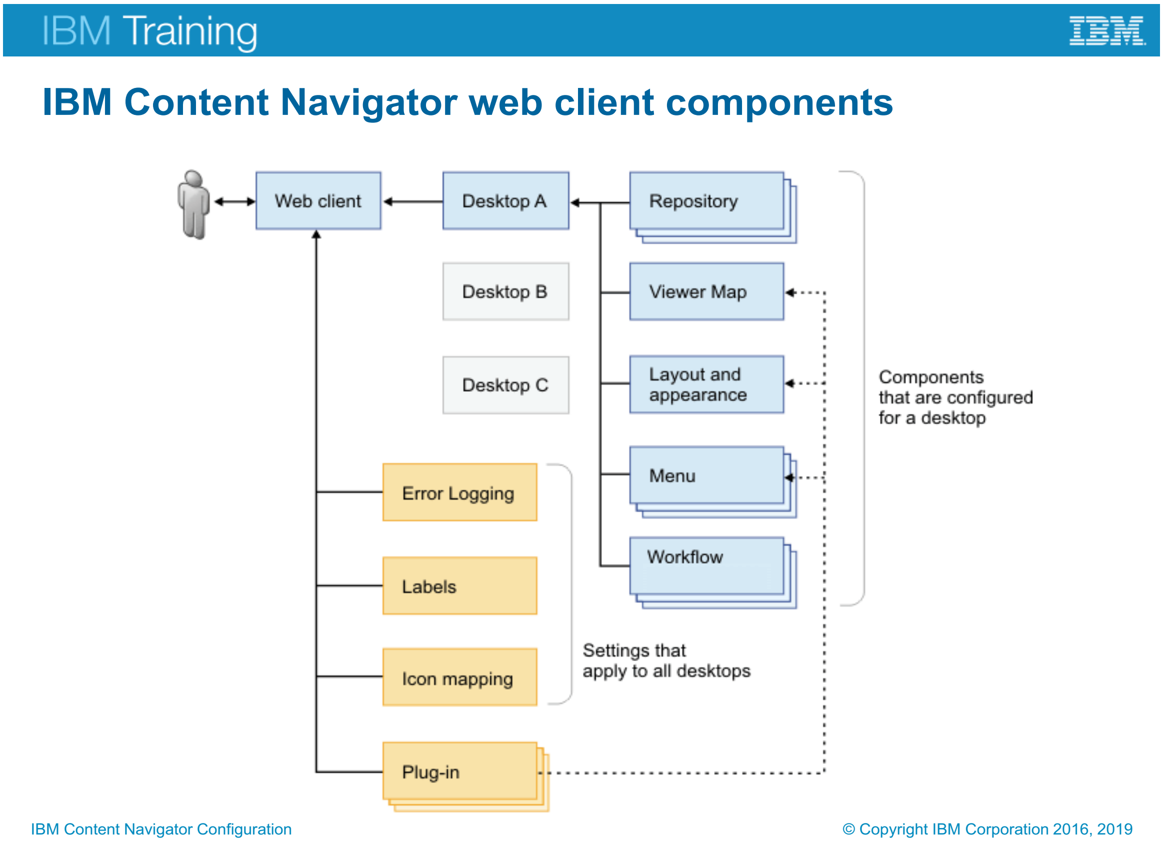


Figure 2-7. IBM Content Navigator web client components

The screen capture shows the IBM Content Navigator web client components.

Web client components that are configured for a desktop:

- A set of repositories
- A Viewer Map
- A layout
- A set of menus
- A set of workflows

Common components that apply to all of the desktops:

- Error logging settings
- Labels
- Icon mappings
- Plug-ins

In this unit and the following units, you configure the components.

The Workflow topic is discussed in detail in the IBM Case Foundation courses.

2.2. Configure a repository

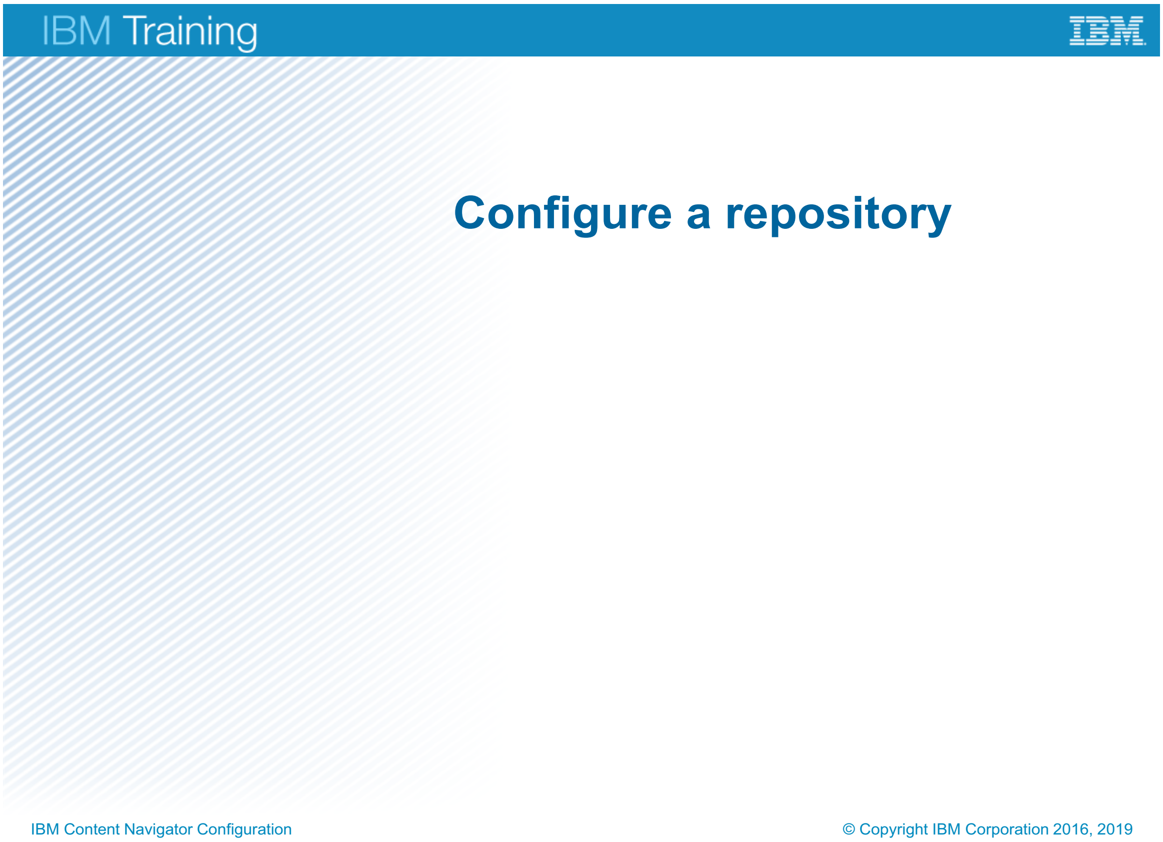
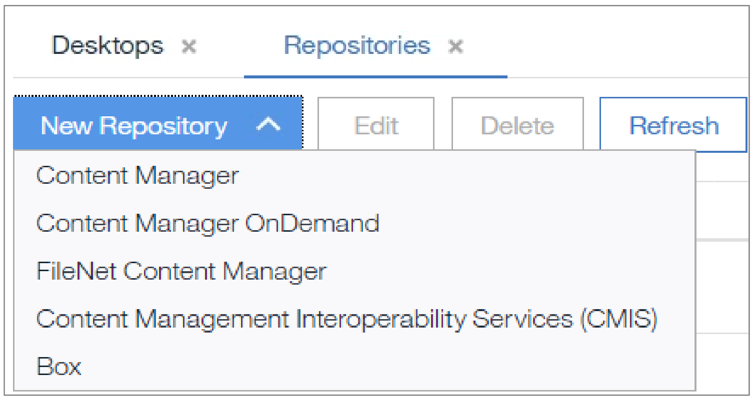


Figure 2-8. Configure a repository

IBM Training

IBM Content Navigator supported repositories

- IBM FileNet Content Manager (P8)
- IBM Content Manager (CM)
- IBM Content Manager OnDemand (OD)
- Content Management Interoperability Services (CMIS)
- Box



IBM Content Navigator Configuration

Figure 2-9. IBM Content Navigator supported repositories

The screen capture shows a list of IBM Content Navigator supported repositories.

When you configure a new repository on the IBM Content Navigator administration tool, you choose the type of the repository to which you want to connect.

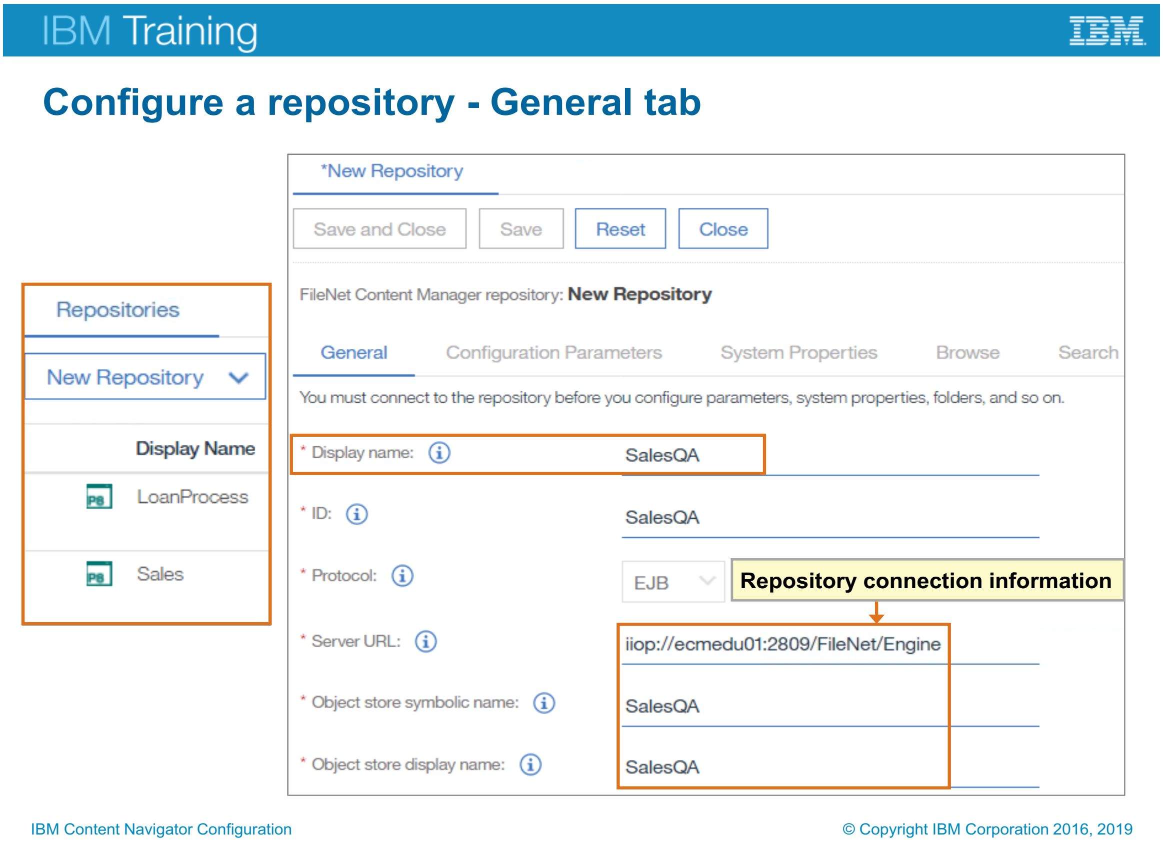


Figure 2-10. Configure a repository - General tab

The screen capture shows the **General** subtab on the **New Repository** configuration tab. On the left, a list of repositories that are configured are shown on the **Repositories** tab.

To access the content in a repository:

- Connect to the repository with the administrator login credentials
- Configure the repository for use in the IBM Content Navigator web client

You provide the following repository connection information for a FileNet Content Manager repository:

- Object store symbolic name and display name
- URL for the Content Platform Engine server

The name that you enter on the **Display name** field is shown in the IBM Content Navigator web client when users browse, search, or access the repository for any other actions.

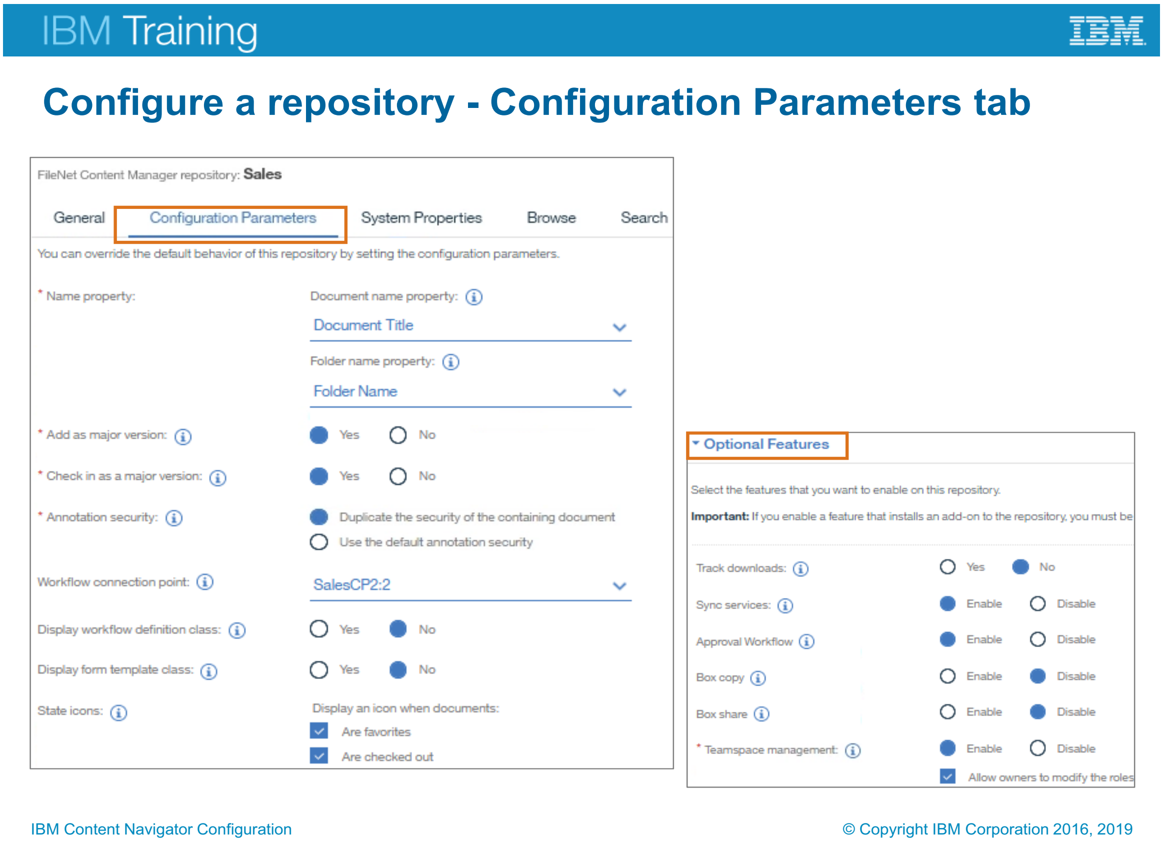


Figure 2-11. Configure a repository - Configuration Parameters tab

The screen capture on the left shows the **Configuration Parameters** subtab in the Repository configuration tab. The screen capture on the right shows the **Optional Features** section in the same tab of the Repository configuration page.

The FileNet Content Manager repository has the following configuration parameters:

- Name Property

  Use to specify which property to use for the document name or for the folder name.

- Use the following items to define the default behavior when adding or checking in a document to the repository:

  - Add a document as a major version
  - Check in a document as a major version

- Annotation security

  Define whether to use the security of the containing document or to use the default annotation security that has been defined in the repository for the annotation class.

- Workflow connection point and settings

  If you want to use IBM FileNet workflows, you must configure the connection point.

- State icons

  You can choose to display icons to show the document state (Examples: Favorites, checked out, or minor versions).
- File name to use when you download documents

  You can choose to use the file name or the name of the item in the repository.

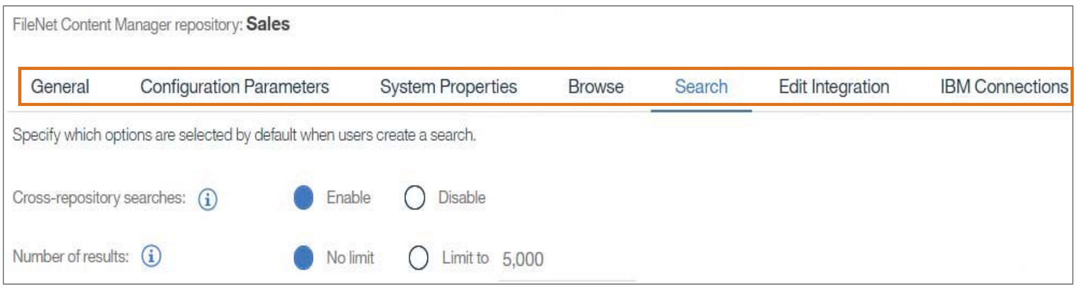
Optional features that you can enable and configure for the repository:

- Track downloads
- Sync services
- Approval Workflow
- Box copy and share
- Teamspaces and Teamspace templates
- Role-based redactions
- Entry Templates management

Most of these features are covered in this unit and the following units.

IBM Training

Configure a repository - Other tabs



IBM Content Navigator Configuration

Figure 2-12. Configure a repository - Other tabs

The screen capture shows the different tabs available for a repository configuration. The **Search** tab is open.

The previous two slides showed the information on the **General** and **Configuration Parameters** tabs.

Other tabs include:

- **System Properties**

  In this tab, you specify which system properties to show for the documents and folders for this repository.

- **Browse**

  In this tab, you specify the properties to show for the documents and folders in the content list when users are browsing this repository. You can also specify the order in which the properties are shown.

- **Searches**

  In this tab, you:

  - Enable cross-repository searches and configure other search-related parameters
  - Assign search roles (create, use, or administration)
  - Select the properties that users can search on and hide the properties that you don't want the users to search on
  - Specify the operators that are available for the users to search
- **Edit Integration**
- If you install IBM Content Navigator for Microsoft Office, you can specify how documents are handled when they are added or checked into this repository.
- You can enable edit services to enable users to add or edit files in the original applications.
- **IBM Connections**
- If you have IBM Connections and a FileNet Collaboration Services web application, you can configure community teamspaces and activity streams for the repository.

2.3. Create an IBM Content Navigator desktop

Figure 2-13. Create an IBM Content Navigator desktop

IBM Training

Configure IBM Content Navigator desktops

- A desktop includes the following default features:
  - Home (Favorites), Browse, and Search
- A list of repositories that are available for a desktop
- Other information for a desktop
  - Viewer Map, Layout, Menus, and toolbars, Workflows, Teamspaces
- Configure properties for a desktop
  - Name and ID
  - Repository authentication
  - Selected repositories
  - Selected features
  - Application name

IBM Content Navigator Configuration

Figure 2-14. Configure IBM Content Navigator desktops

An IBM Content Navigator desktop is one instance of the IBM Content Navigator web application user interface within the Content Navigator deployment.

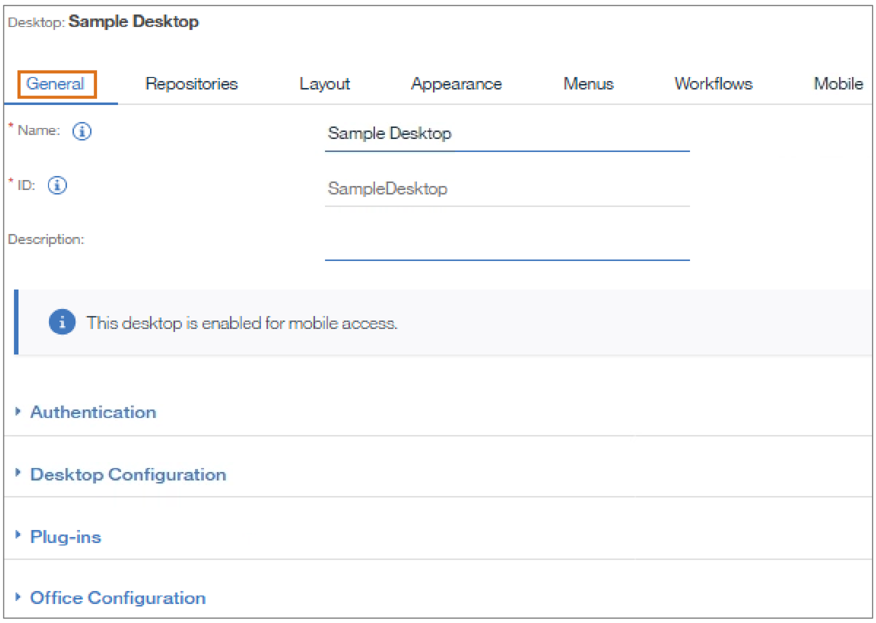
- You can create several desktops
- The administration desktop is always included with IBM Content Navigator. You must create at least one desktop for your users before they can access the web client.

In the following charts, the General, Repositories, and Layout tabs of the Desktop configuration are discussed.

The Appearance, Menus, and Mobile tabs are discussed in later units in this course.

IBM Training

Configure a desktop - General tab



IBM Content Navigator Configuration

Figure 2-15. Configure a desktop - General tab

The screen capture shows the **General** tab in the desktop configuration page.

Configure properties for a desktop in the General tab:

Name and ID

You use the name and ID to identify the desktop. The ID value is used to create a unique URL for this desktop.

Authentication

- You must specify a repository against which the users are authenticated when they open this desktop.
- You can limit access to specific users.
- You can enable role-based desktop administration.

Desktop Configuration

In the Desktop configuration section, you can do the following tasks:

- Select a viewer map (for viewing different file types)
- Configure Merge and split
- Enable Sync services

- Enable Edit services
- Configure Box share services
- Identify where to search for information about error messages
- Configure other settings such as set this desktop as the default, security settings, and enable FileNet P8 workflow email notification

Additional settings

In the Additional settings section, you can do the following tasks:

- Specify Add and check-in document behavior
- Control whether user can create searches

Plug-ins

- Enable or disable the plug-ins for this desktop

Office Configuration

- Options for working with documents in Microsoft Office Applications

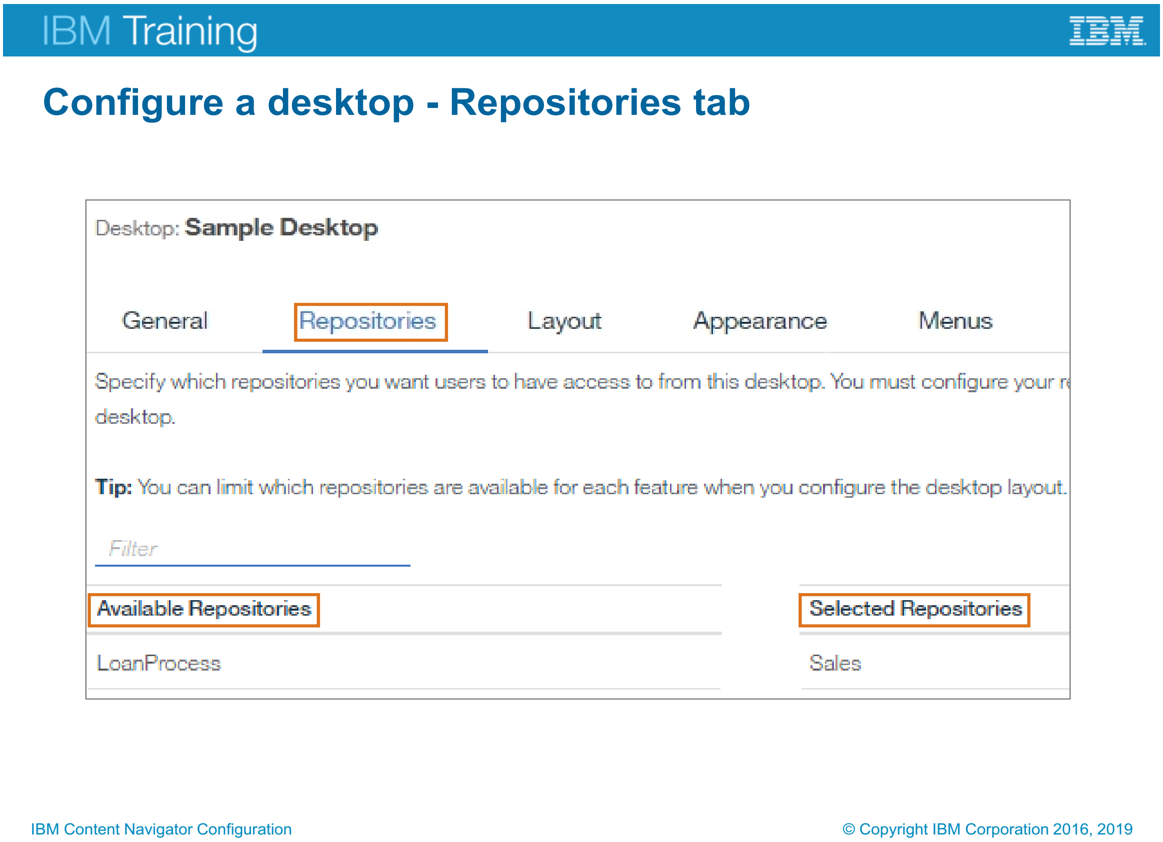


Figure 2-16. Configure a desktop - Repositories tab

The screen capture shows the **Repositories** tab in the desktop configuration page.

The configured repositories are shown in the **Available Repositories** pane. You move the repositories that you want to be available for this desktop to the **Selected Repositories** pane.

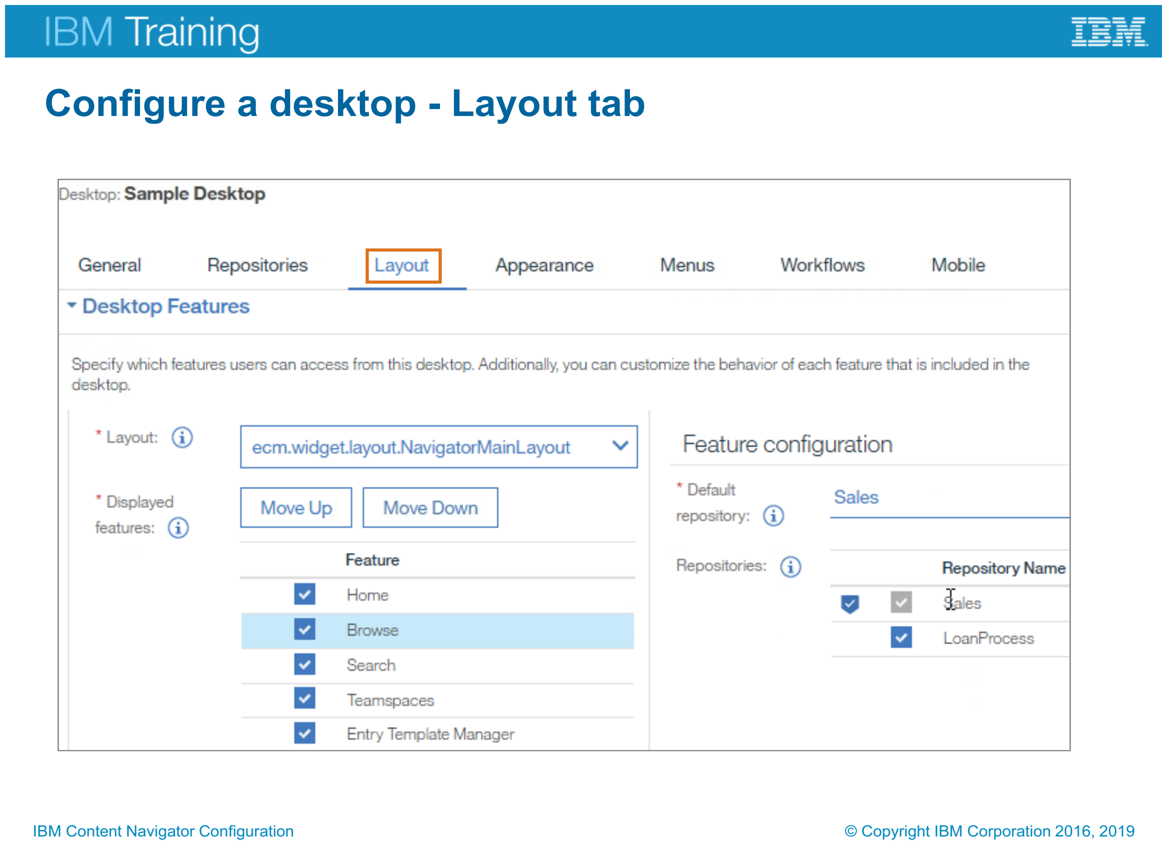


Figure 2-17. Configure a desktop - Layout tab

The screen capture shows the **Layout** tab in the desktop configuration page. The **Browse** feature is selected.

Layout tab **> Desktop Features** section

- You can leave the default layout or apply a custom layout.
- Select different features to include to this desktop.
  - Example: Teamspaces, Work, Entry Template Manager (in addition to the Home, Browse, and Search features that are added by default).
  - Arrange the Features in the order that you want.
- For each Feature, you can configure different settings.
  - Example: For the Browse feature, specify a default repository, and a list of repositories that you want to add in the Browse page. The repositories can be a subset of repositories that you configured for this desktop.

Layout tab **> Additional Desktop Components** section

You can show or Hide the following features based on your needs for a more streamlined interface and to improve the performance of the web client.

- Document thumbnails
- Global toolbar
- Status bar
- Content list check box

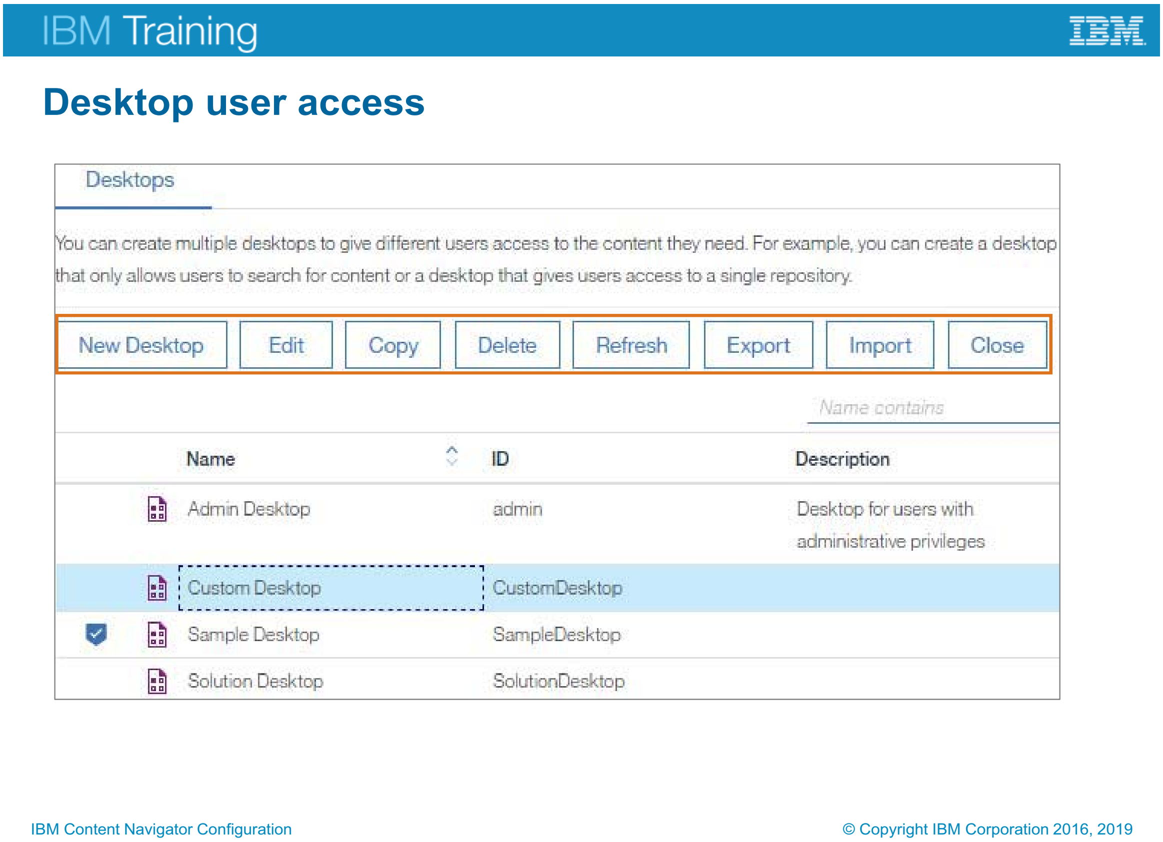


Figure 2-18. Desktop user access

The screen capture shows the **Desktops** tab with a list of desktops created. The actions available for a desktop are highlighted.

Desktop Actions

You can take the following actions for a desktop:

- Create a desktop
- Edit an existing desktop
- Copy an existing desktop into a new desktop and edit the new one
- Delete a desktop that you no longer need. You cannot delete the admin desktop and the desktop that is set as the default desktop.
- Export a desktop for use with a different instance of Content Navigator
- Import a desktop from a different instance of Content Navigator

Control user access to desktops

- The Administrator specifies a default repository for each desktop
- Authentication of users occurs in the default repository for the desktop
- Each desktop is accessed through its own web address by adding /“?desktop=<desktop name> to the base navigator URL
- For each desktop, you can enable or disable the features for the users of that desktop
- Using roles, access to teamspace and In-baskets can be limited

Authorization

- Repository security controls the access to specific content within the desktop

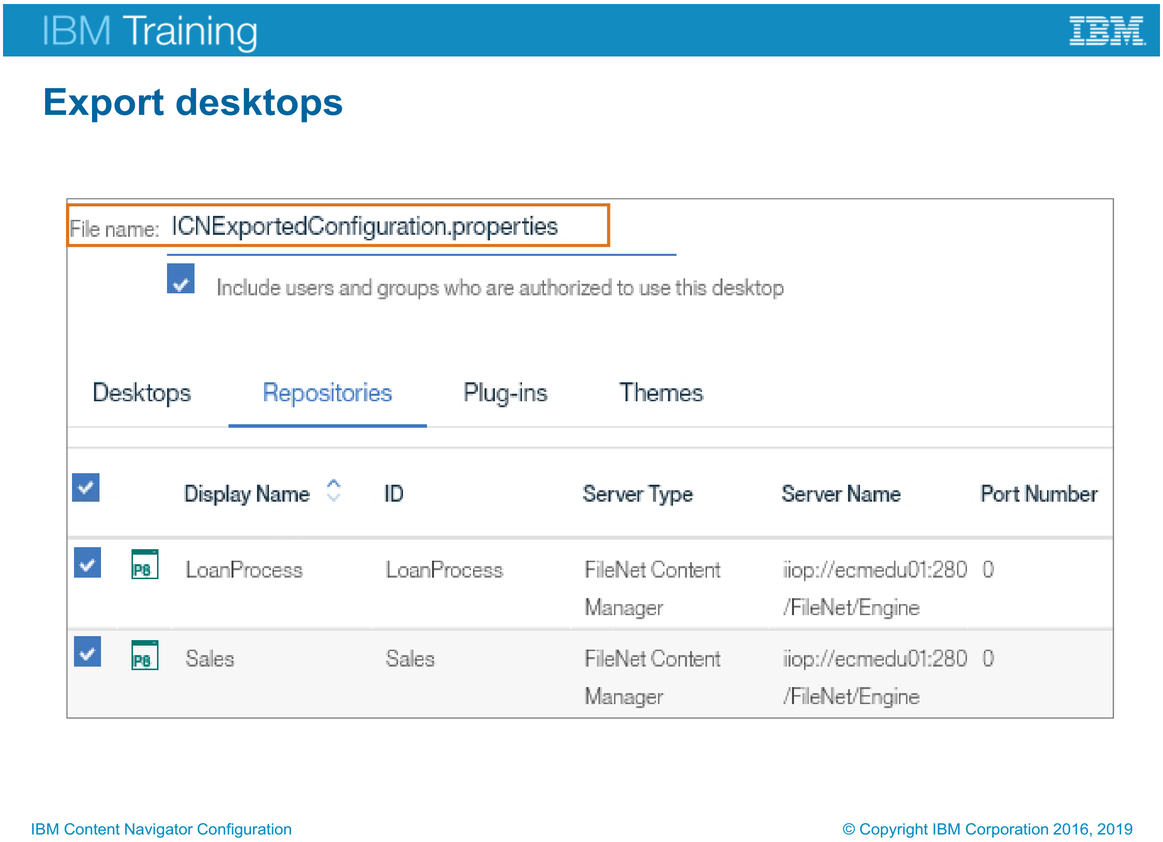


Figure 2-19. Export desktops

The screen capture shows the **Export Desktop** page. The file name is highlighted. The Repositories tab is open and the repositories that you want to export are selected.

If you have multiple instances of the IBM Content Navigator web client in your environment, you can export your desktops to a file. You can then import the desktops to another instance of IBM Content Navigator.

The IBM Content Navigator instances must be at the same version level.

Procedure to export a desktop

- In the IBM Content Navigator web client, select the desktop and click **Export**.
- On the **Export Desktop** page, enter a name for the export file.
  - Select the Include users and groups option.
  - Select the repositories, plug-ins, and themes that you want to include in your export.
  - Click Export.

The following items are automatically exported with a desktop:

- Viewer Maps
- Menus
- Mobile application features

You might need to perform the following configuration tasks on the target server to make the imported desktops useable:

- Install viewers that are not included with IBM Content Navigator.

  Example: AFP2PDF conversion viewer
- Edit the URL for the repositories in the target server as needed. For instance, update the desktop to use the production copy of a repository rather than the test copy.
- Edit the URL of plug-ins as needed.

2.4. Define a cross-repository search

Figure 2-20. Define a cross-repository search

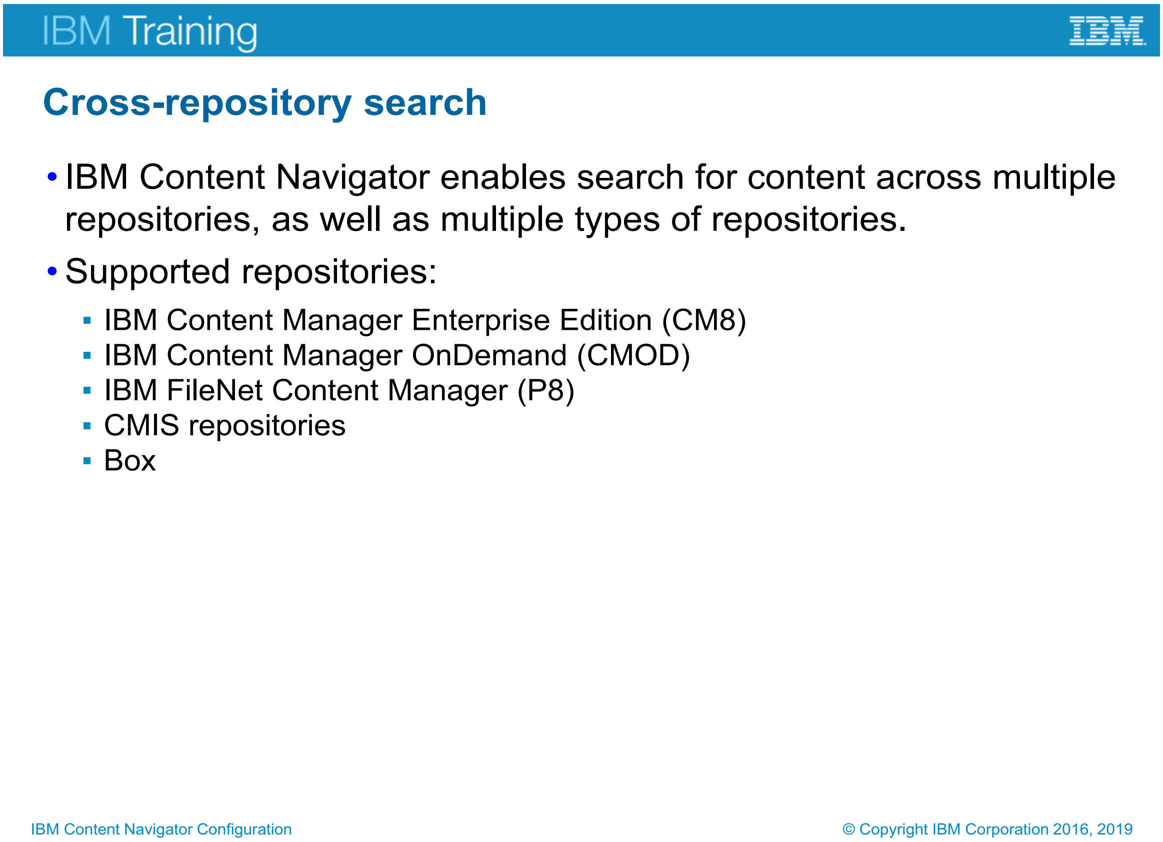


Figure 2-21. Cross-repository search

Example for multiple repositories: Two IBM FileNet Content Manager repositories

Example for multiple types of repositories: IBM FileNet Content Manager and Box repositories

Example scenario:

The transaction records, financial history, and loan application documents of customers are stored in separate repositories. Loan underwriters in your company must search for these documents and review them before they can approve a loan.

You create a process that helps the underwriters find the customer information quickly for loan qualification. You create a cross-repository search to find the documents.

IBM Training

Cross-repository search features

- Search in up to five distinct repositories simultaneously in one interface.
- Save the cross-repository searches in a CM8 or P8 repository
- Support for property-based search and property mappings
- Same security model as regular searches
- Identified by a unique icon

IBM Content Navigator Configuration

Figure 2-22. Cross-repository search features

You can search up to 5 repositories simultaneously in any combination of IBM Content Manager Enterprise Edition (CM8), IBM Content Manager OnDemand (CMOD), IBM FileNet Content Manager (P8), CMIS repositories, and Box repositories.

Up to 500 results are retrieved per repository in a single sortable merged result set.

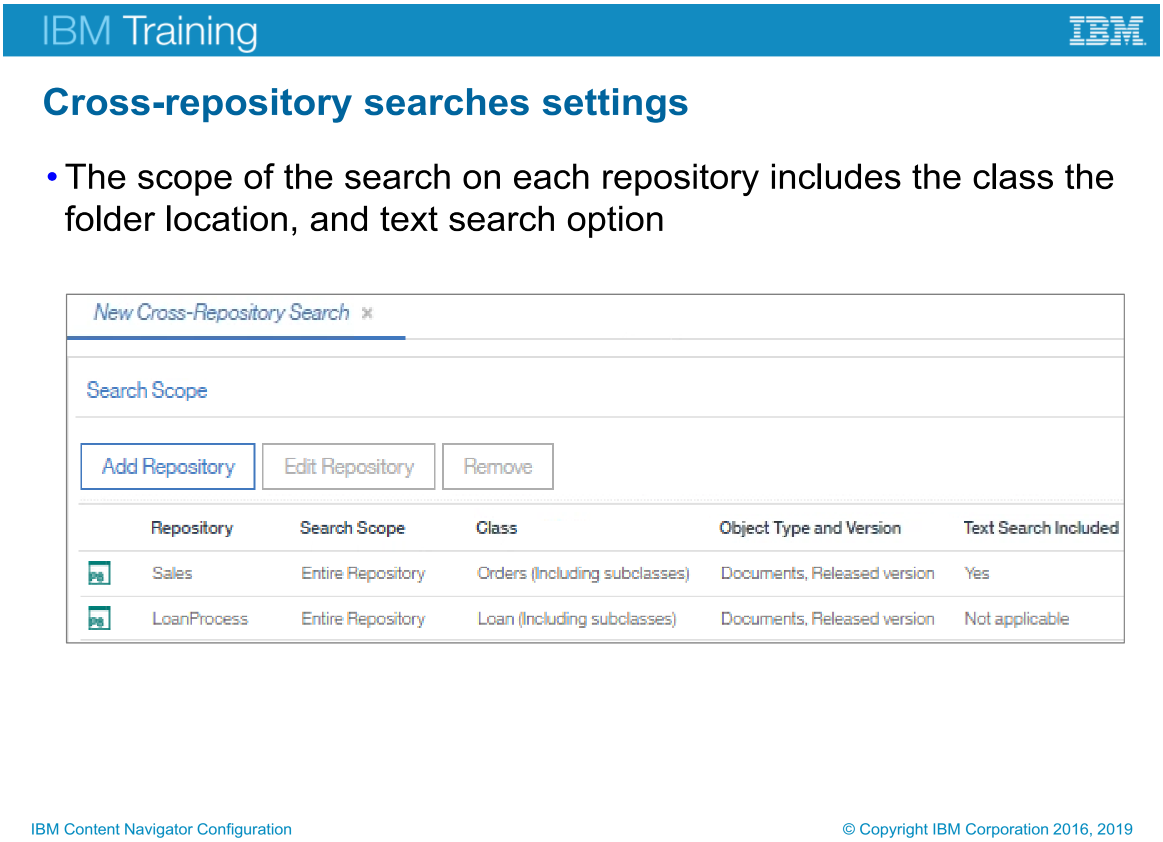


Figure 2-23. Cross-repository searches settings

The screen capture shows the search scope for a cross-repository search.

When you create a cross-repository search, you can specify the following settings:

- The scope of the search on each repository
  - The classes that you want to include in the cross-repository search
  - Limit the search to a specific folder on IBM FileNet Content Manager and IBM Content Manager
- How properties from each repository are related to each other
- Any default search criteria that you want to display when users open the search

  Cross-repository search considerations

  - When you build a search, plan ahead for maximum efficiency.
    - Changes to the scope might result in the removal of mappings and criteria
  - When you create property mappings, mouse-over the properties to disclose the data type.
  - Modify the criteria to narrow the results if a repository search returns more than 500 items.
    - When querying one repository, create regular searches

IBM Training

Property mappings

- A pseudo property with a custom label is used to map one or more properties together

Add Mapping | Edit | Delete

Mapping Name	Type	Repositories
Cost	Floating-point number	Sales, LoanProcess
ID	Text string	Sales, LoanProcess
Title	Text string	Sales, LoanProcess

Figure 2-24. Property mappings

The screen capture shows the property mappings for a cross-repository search.

A property mapping consists of a pseudo property with a custom label that maps one or more properties together. It provides the way IBM Content Navigator:

- Defines criteria common to multiple repositories with one condition
- Consolidates search results from various repositories

In each mapping, what can be mapped?

- Only one property from each repository

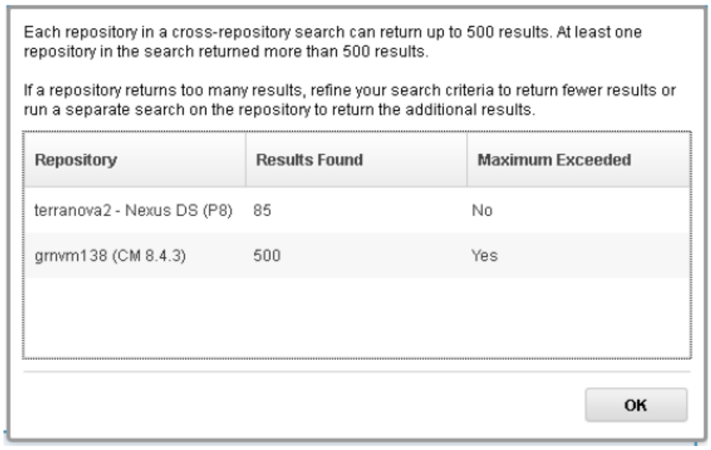
  It is not necessary to include all repositories.
- Properties must have the same data type with one exception: Date and time stamp
- Properties must have the same cardinality

  Single or multiple values
- Properties must have one or more operators in common

IBM Training

Run cross-repository searches

- One condition with a value is required for each repository
- Repository searches are run in sequential order



IBM Content Navigator Configuration

Figure 2-25. Run cross-repository searches

The screen capture shows the search results analysis dialog box when the repositories results exceed 500 threshold.

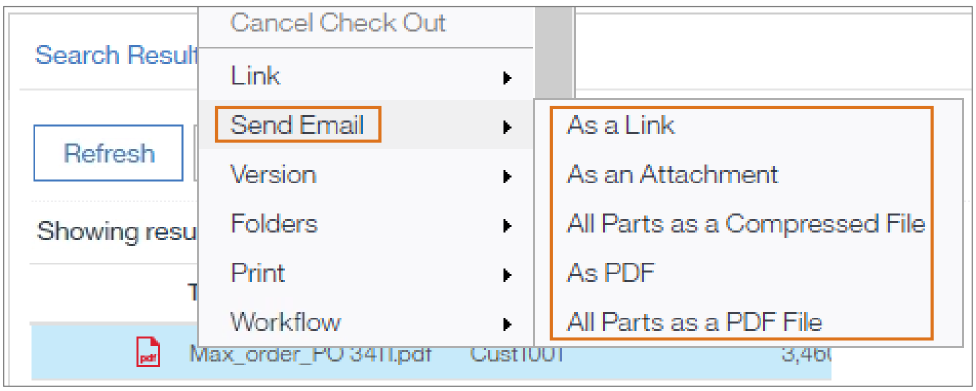
Run cross-repository searches

- Results from each repository are merged and sorted by Content Navigator (no query sort).
- Up to 500 results from each repository are retrieved (fixed threshold). Search results analysis dialog box shows repositories that exceed 500 threshold.
- Results list supports Details, Magazine, and Filmstrip view.
- Add Document and Add Folder toolbar actions are available for the search results after you navigate to a folder.
- Context-sensitive actions for each item and multiple-selection actions are available.
- You can export results.

IBM Training

Send search results as an email

- You can send documents that were returned by the search in an email.



IBM Content Navigator Configuration

Figure 2-26. Send search results as an email

The screen capture shows the menu options to one of the documents, as well as a group of documents, returned by the search as an email.

- Right-click a document and select Send Email from the list.
- Select one of the options for the email.

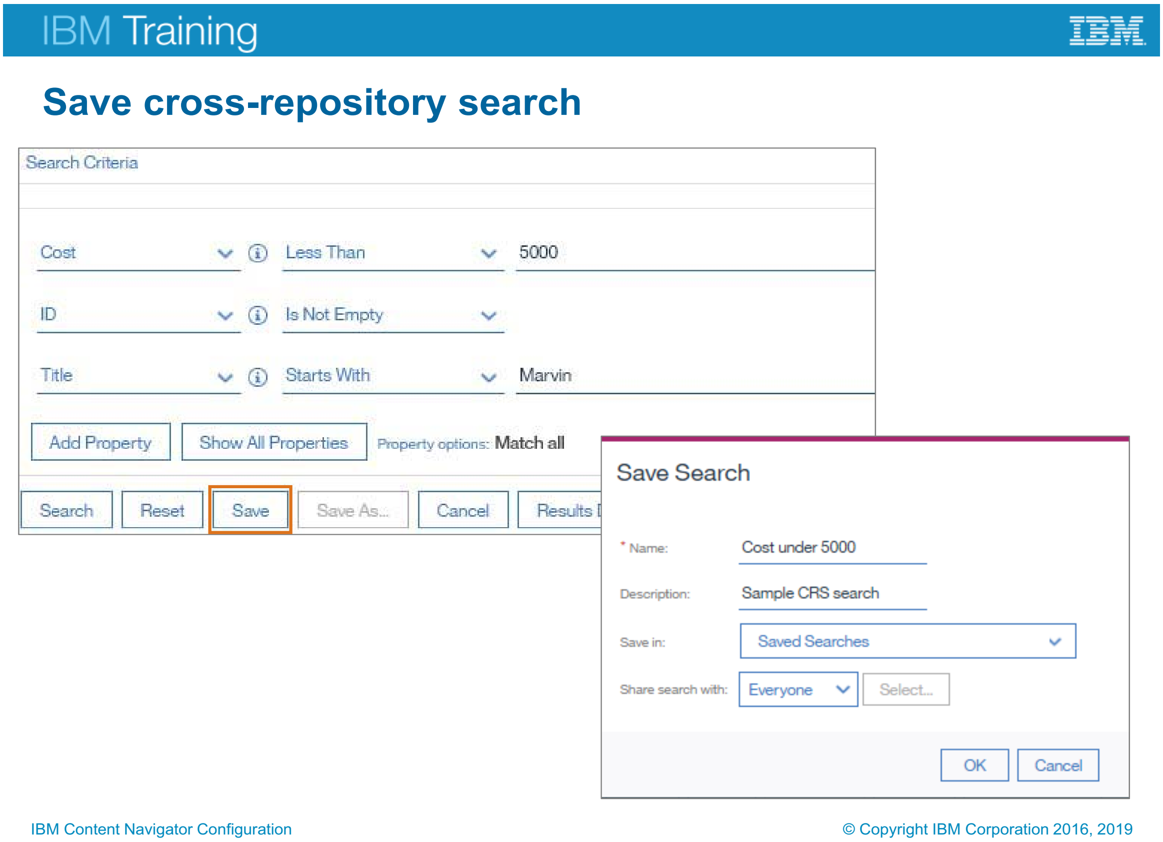


Figure 2-27. Save cross-repository search

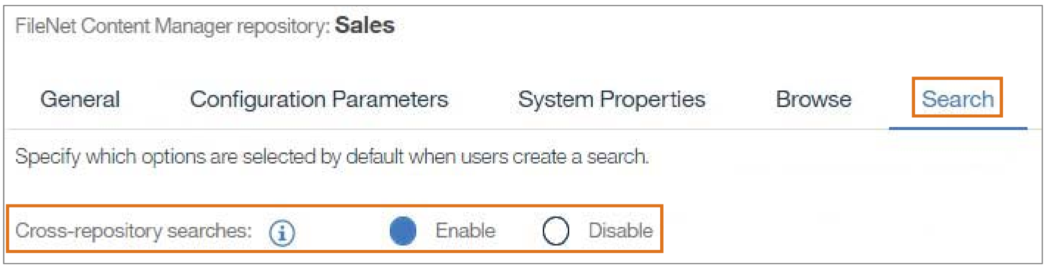
The screen capture on the left shows the **Save** option for a cross repository search. The screen capture on the right shows the **Save Search** dialog box.

You can save the search for later use. Specify which repository and folder the search should be saved in, along with a name, a description, and who should have access to the search.

IBM Training

Repository settings for cross-repository searches

- To use a cross-repository search, the option must be enabled at the repository level.
  - Repository Configuration > Search Tab > Cross-repository searches section



IBM Content Navigator Configuration

Figure 2-28. Repository settings for cross-repository searches

The screen capture shows the Desktop setting that enables the repository to be used in cross-repository searches.

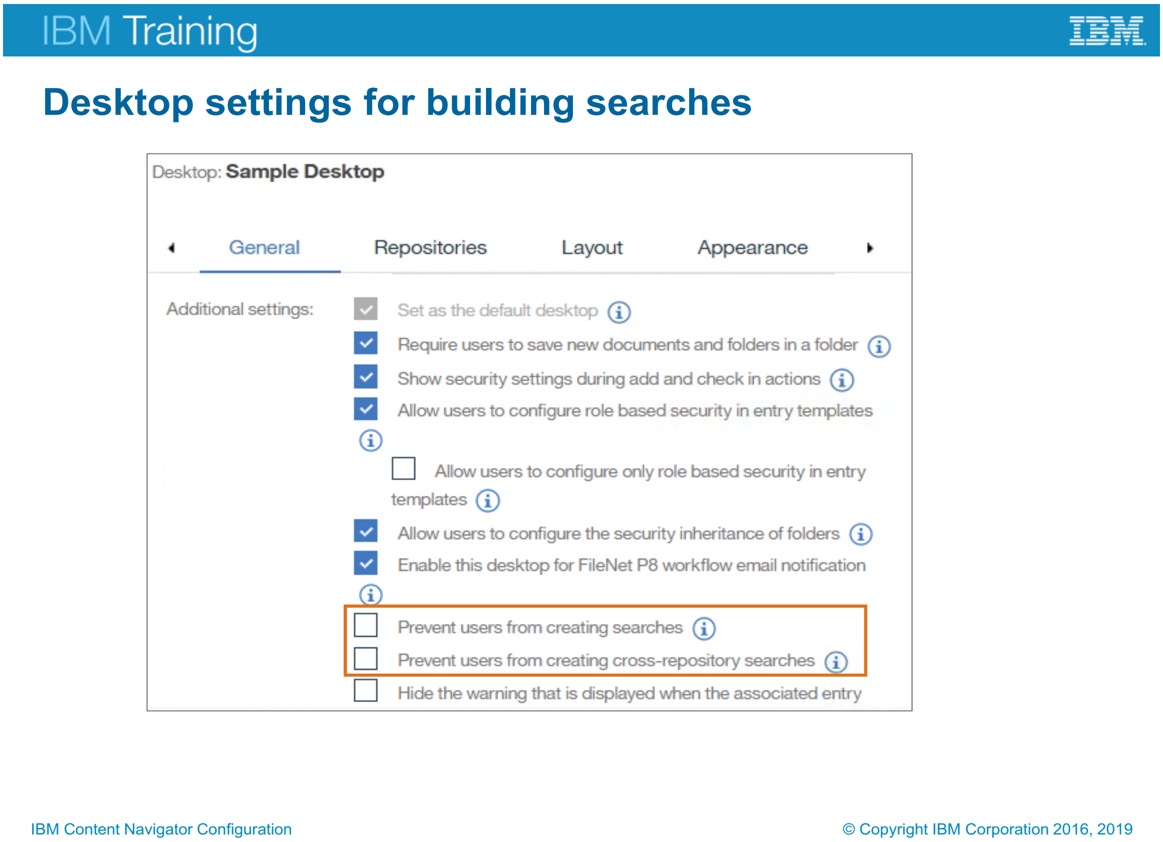


Figure 2-29. Desktop settings for building searches

The screen capture shows the Desktop settings to allow or prevent users from creating searches.

On the administration page, go to the **Desktop configuration** > **General** > **Additional Settings** section and select the options.

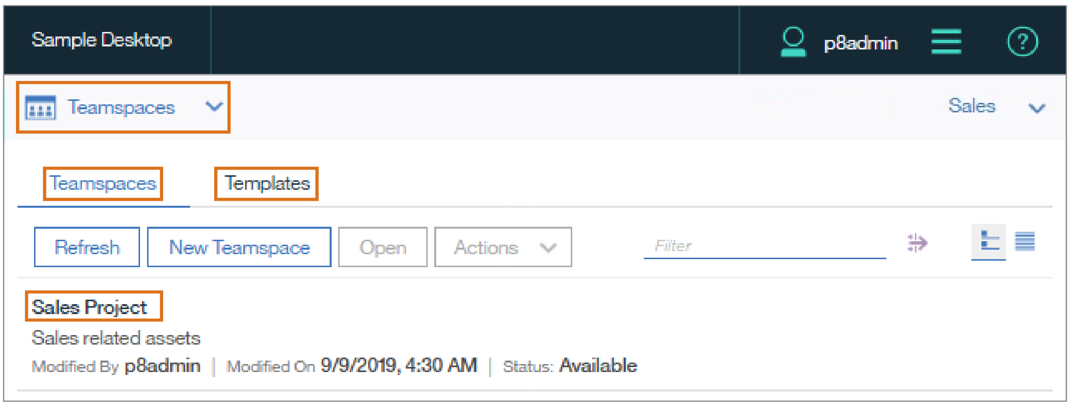
2.5. Create a teamspace and a template

Figure 2-30. Create a teamspace and a template

IBM Training

What is a teamspace?

- Provides a focused view of the relevant documents, folders, and searches that a team needs to complete their tasks
  - Can be thought of as a miniature document repository, with folders and other structures.



IBM Content Navigator Configuration

Figure 2-31. What is a teamspace?

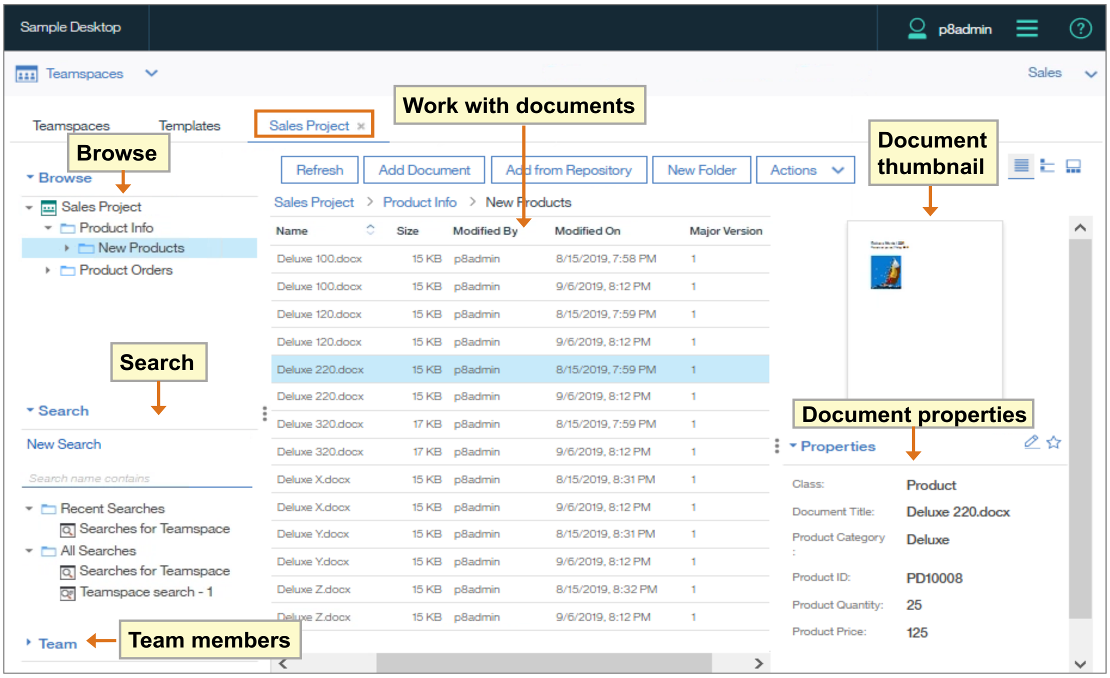
The screen captures show the Teamspace page in IBM Content Navigator. The page has Teamspaces and Templates tabs. A sample teamspace is listed. Templates are used to create teamspaces.

A teamspace:

- Enables users to define organized spaces where teams can share content
- Can hold favorites and entry templates
- Is created from a template that can define default documents, folders and searches
- Has user-defined roles that control access to teamspace activities and content
- Allows users to access the content that is stored in a repository (subject to repository security)

IBM Training

A sample teamspace



IBM Content Navigator Configuration

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Figure 2-32. A sample teamspace

The screen capture shows a sample teamspace (Name: Sales Project) in IBM Content Navigator.

The sample teamspace consists of the following selected items:

Folders and documents

- Folders and documents specific for the project are shown in Browse view.
- Properties, thumbnail of the document, and all other Browse features are available.

Saved Searches

- Any saved searches that are included in the teamspace are shown in the Search section.
- You can also create new searches.

Team

- All the members who are part of this project are listed.

IBM Training

Personalized for business user needs

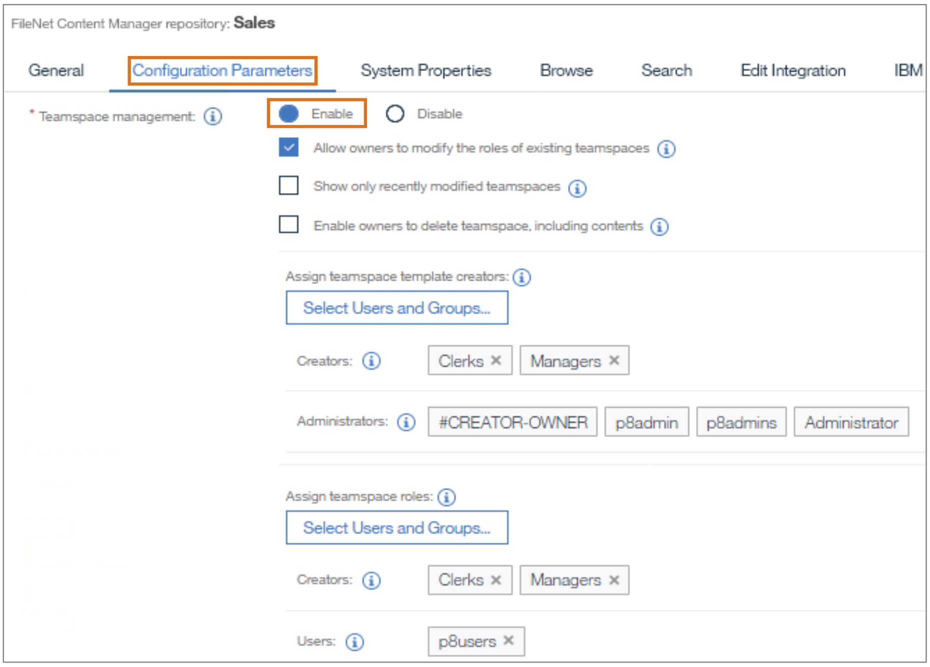
- Teamspaces are personalized for your project
- A teamspace can have:
  - Selected document classes
  - Selected searches
  - A flexible folder structure
  - Documents for your project
  - Role members (required)

IBM Content Navigator Configuration

Figure 2-33. Personalized for business user needs

IBM Training

Enable teamspace usage on a repository



IBM Content Navigator Configuration

Figure 2-34. Enable teamspace usage on a repository

The screen capture shows the Teamspace management configuration for a repository in the IBM Content Navigator Administration tool.

Teamspace capability is available for IBM FileNet Content Manager (P8) and IBM Content Manager (CM8) repositories.

- To configure teamspaces on a desktop, enable teamspace management for the specified repository:

  Admin page > Repositories > P8 or CM8 repository > Configuration Parameters tab > Optional Features section

- To configure a repository for teamspace usage, you must be able to connect to the repository as a repository administrator.
- The repository must support hierarchical folders.
- You can enable a repository for teamspaces before or after the repository is selected for use with a desktop.
- The Enable option adds necessary objects for teamspaces to the P8 or CM8 repositories.

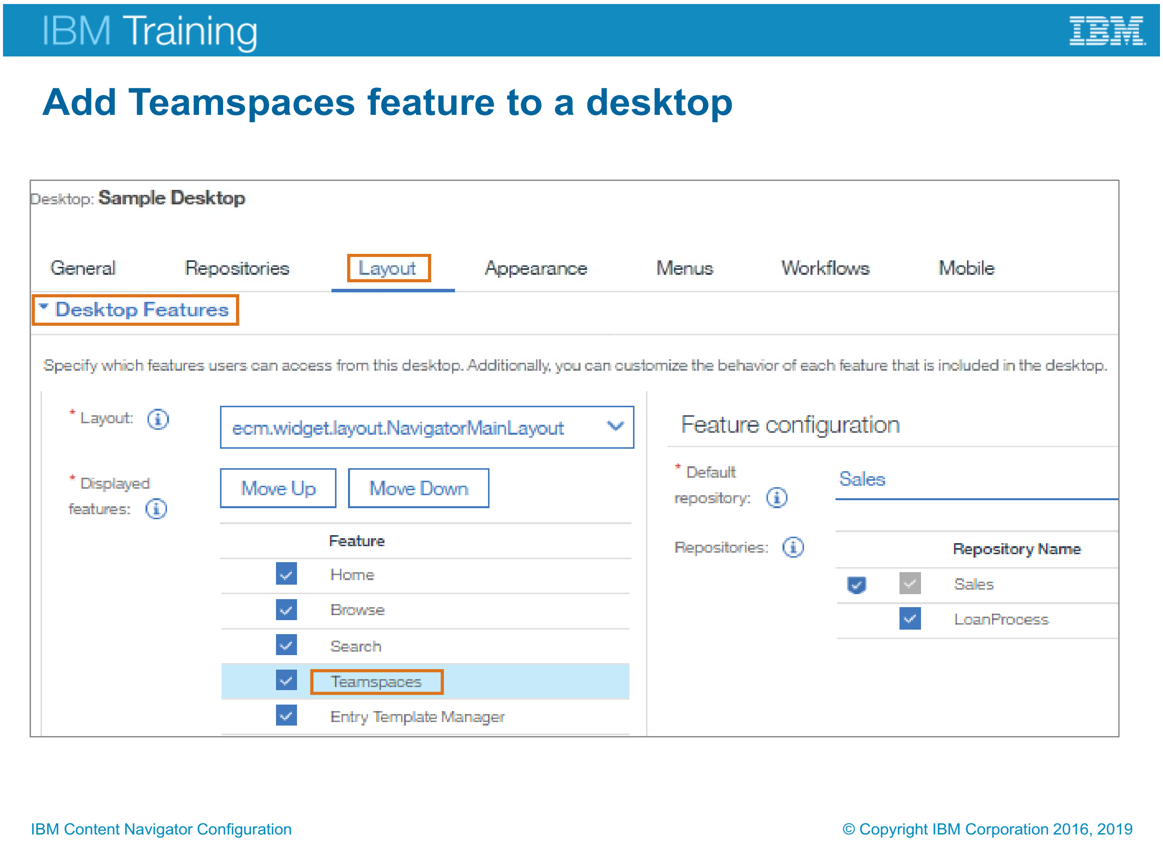


Figure 2-35. Add Teamspaces feature to a desktop

The screen capture shows the Teamspaces configuration for a desktop in IBM Content Navigator Administration tool.

To use the teamspaces on a desktop, specify the Teamspaces feature: Admin page > Desktop configuration > Layout tab > Desktop Features section

- By default, the feature is not selected.
- You can select a default repository for teamspaces.
- All the repositories that are enabled for teamspaces and that are available in the desktop can be used with the teamspace feature.

IBM Training

Teamspace templates

- Teamspace templates:
  - Allow other users to quickly create new teamspaces (self-provisioning).
- When you create a template, you specify:
  - The repository to use
  - Which users to share the template with (Only me, Everyone, or Specific users and groups)
  - Document classes or entry templates to add documents
  - Folders to organize content
  - Documents
  - Saved searches
  - Roles

IBM Content Navigator Configuration

Figure 2-36. Teamspace templates

Teamspace templates

- Accelerate and standardize teamspace creation
- Are specific to a repository
- Can define default documents, folders, searches, and roles.
- Have their own security to control which users can use them.
- Provide a predefined set of choices for creating a teamspace.

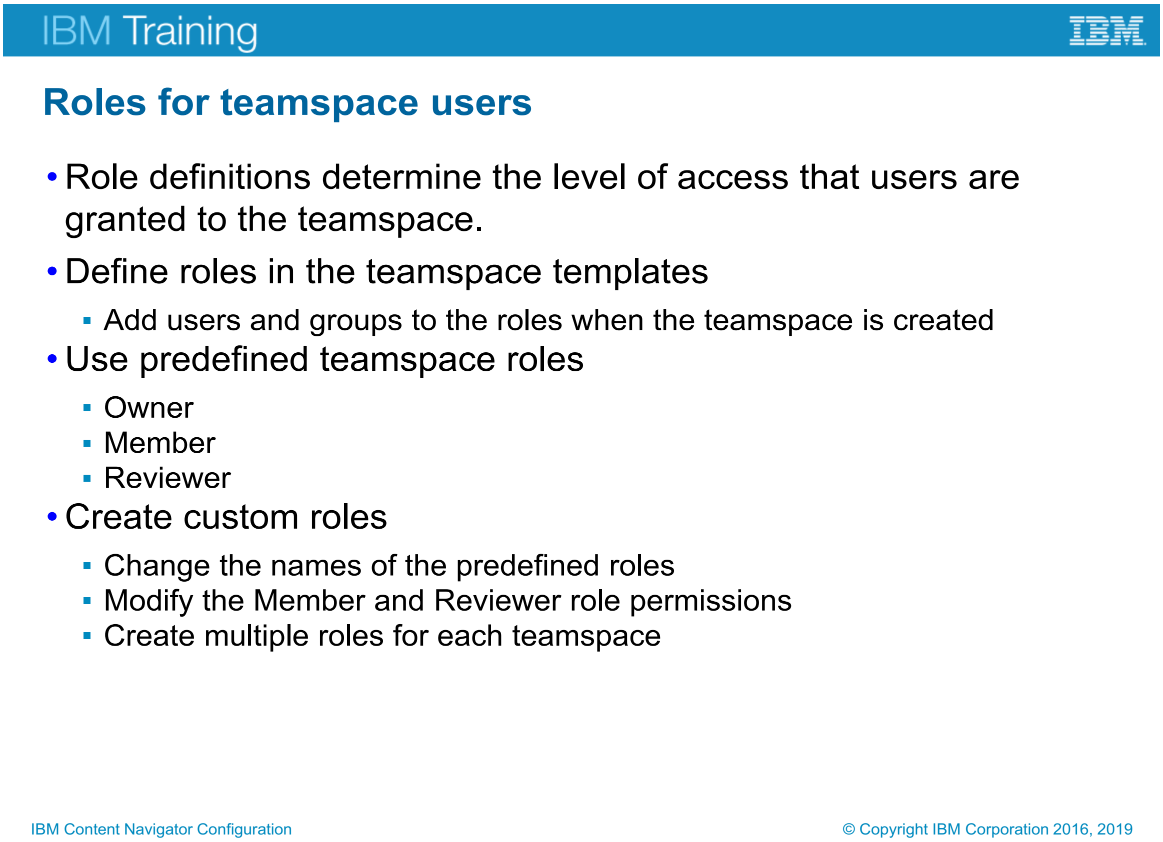


Figure 2-37. Roles for teamspace users

You can define more roles for teamspaces for custom security access.

- Create multiple roles for each teamspace so that different users have different access levels to activities and content.
- The permissions that are associated with an assigned role do not supersede the privileges or access control that is set in the repository for any piece of content.

IBM Training

Export and import teamspace templates

- You can import the templates only to the same repository type.
  - The user must have permission to create templates
  - Templates are imported into a `requires validation` state
- Template validation after the import
  - Searches, entry templates, classes, and documents are validated
  - The folder structure is created when the teamspace instance is created
  - The builder shows any invalid items
  - After the validation, the template is saved in the `available` state

IBM Content Navigator Configuration

Figure 2-38. Export and import teamspace templates

Templates can be exported from or imported into a repository.

- They can be imported into the same repository type as the repository from where they were exported.
- For example, an error message is displayed if the user tries to import a CM8 template into a P8 repository.

Template validation after the import

- Searches, entry templates, classes, and documents are validated to check whether they exist on the current repository.
- Folder Classes are validated.
  - The folder structure is always created when the teamspace instance is created.
- After the validation, the template is saved in the available state.
  - Click Validate to publish the template.
  - The templates that are in the available state can be used to create new teamspaces.

2.6. Configure role-based desktop administration

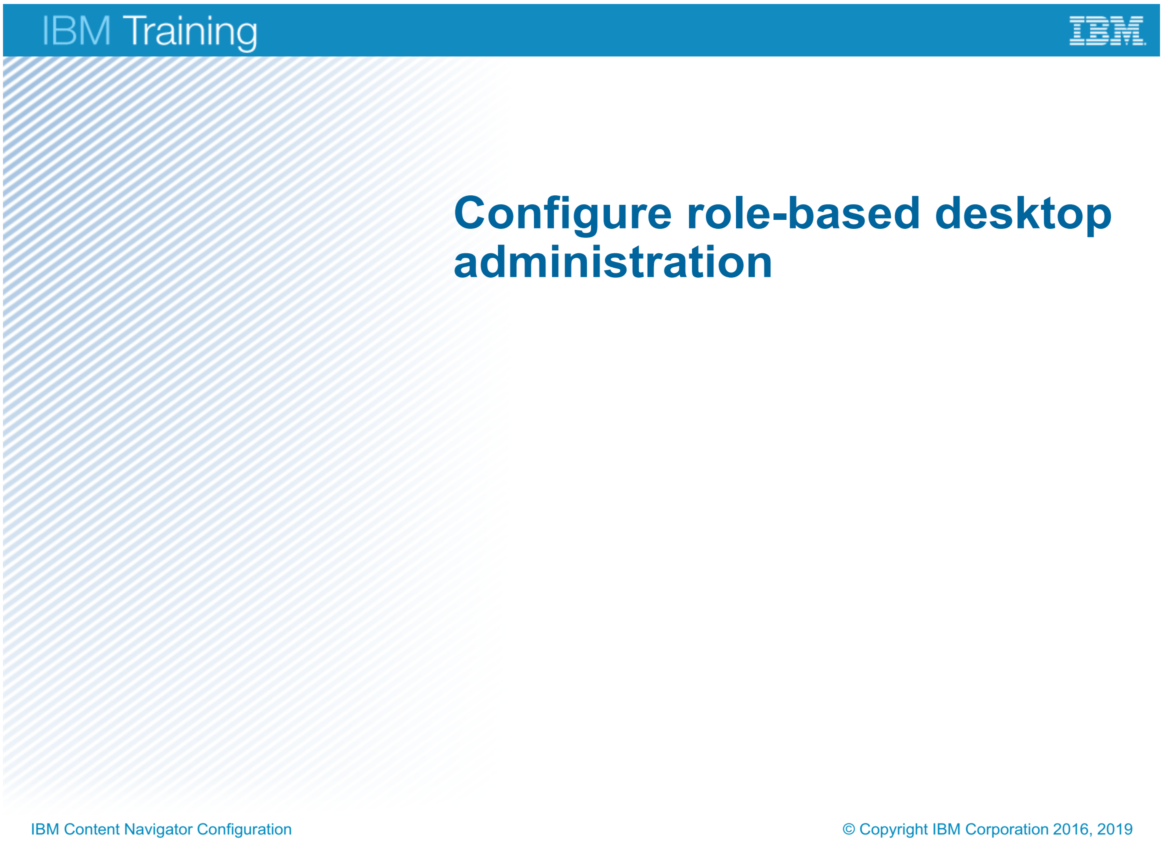


Figure 2-39. Configure role-based desktop administration

IBM Training

Use case for role-based administration

- IT departments want to move some ICN configuration tasks to department-level administrators.
- Benefits of including department-level administrators (role-based):
  - Lessen the backlog for the global IT department
  - Move these tasks closer to the users that require them
  - Provide faster turnaround for some administration tasks

IBM Content Navigator Configuration

Figure 2-40. Use case for role-based administration

In many scenarios, the global IT department does the IBM Content Navigator (ICN) administration tasks. This arrangement can result in significant delays completing even simple configuration tasks for a Content Navigator desktop due to backlogs. This backlog can be minimized by configuring role-based administration access to department-level administrators and moving some of the administration tasks to them.

IBM Training

Terminology

- Global administrator
  - Traditional IBM Content Navigator (ICN) administrator with full privileges
  - Usually a member of the IT staff
- Desktop administrator
  - Department-level ICN administrator
  - Granted a subset of the desktop and role-based redaction administrative privileges by a global administrator

IBM Content Navigator Configuration

Figure 2-41. Terminology

A global administrator with full privileges can configure a desktop administration role with a subset of desktop and role-based redaction administrative privileges. The global administrator can then apply that role to multiple desktops. You can have only one desktop administration role per desktop.

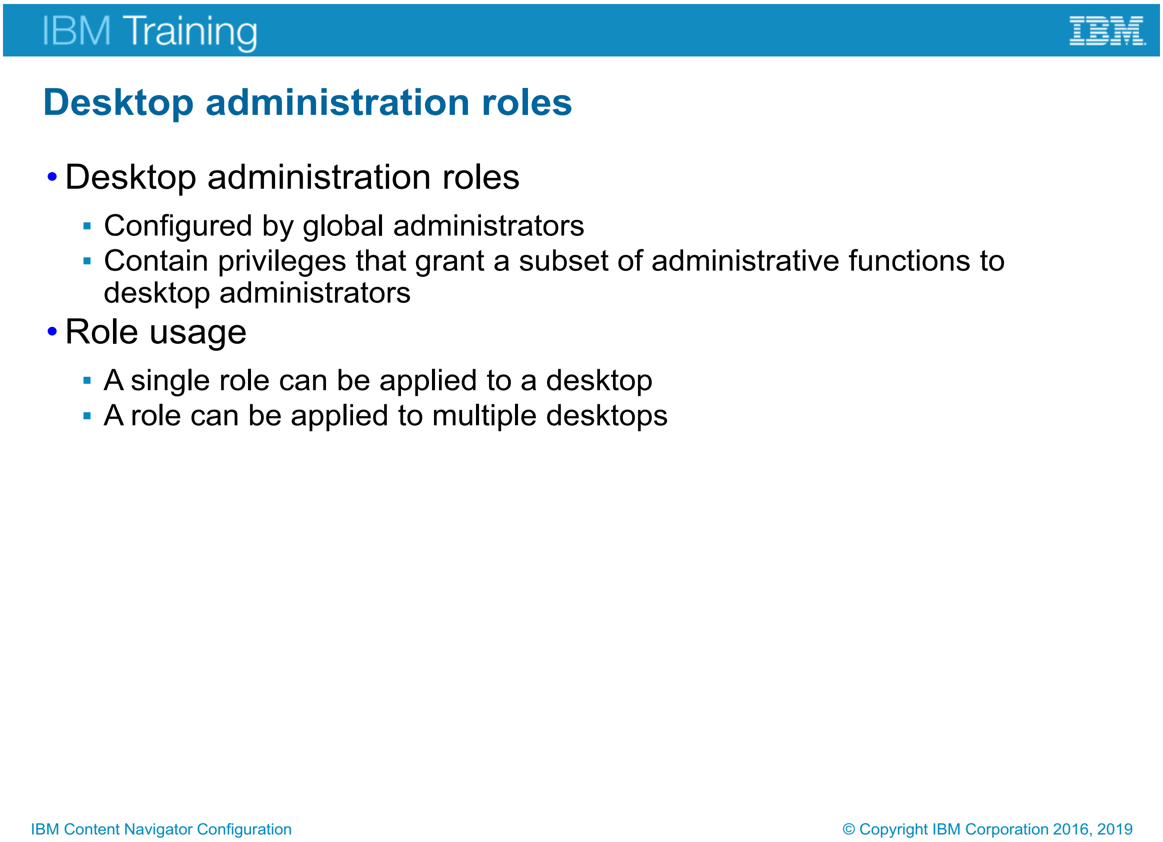


Figure 2-42. Desktop administration roles

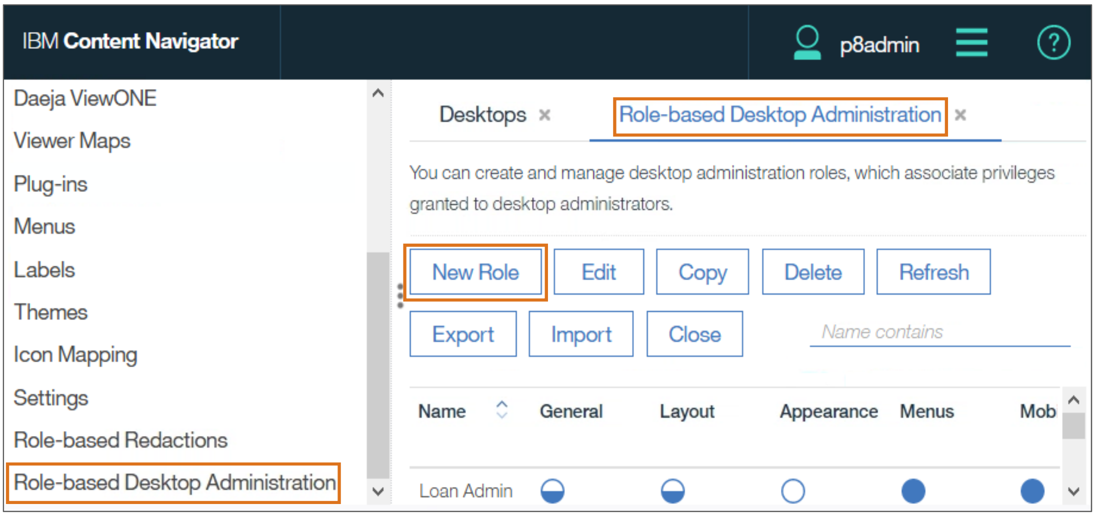
Desktop administrators roles are configured separately from the user roles.

Users and groups are supported. Users can also be explicitely denied desktop administrator access

IBM Training

Create desktop administration roles

- Desktop administration roles:
  - Are created and maintained by global administrators
  - Can be copied, exported, or imported



IBM Content Navigator Configuration

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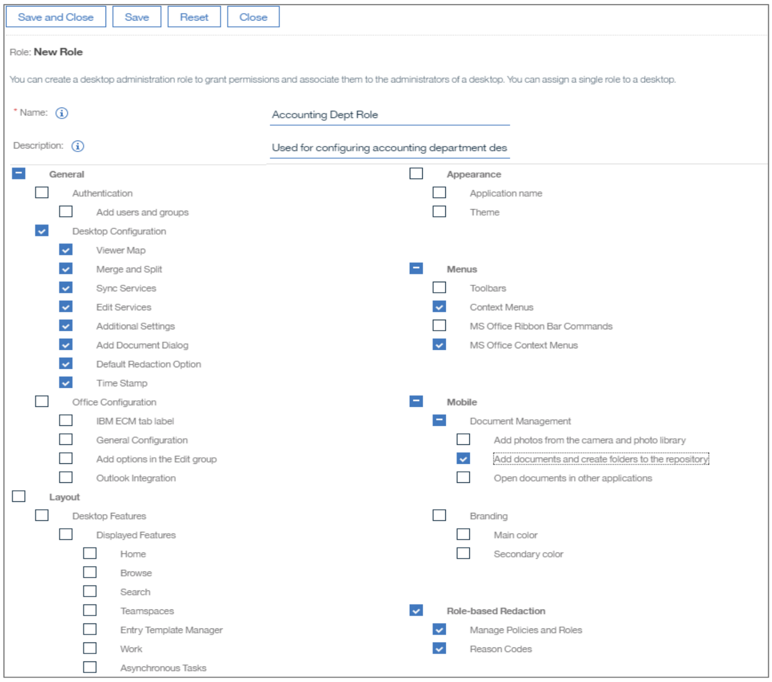
Figure 2-43. Create desktop administration roles

The screen capture shows the Role-based Desktop Administration page on the IBM Content Navigator Administration tool. The Role-based Desktop Administration menu on the left pane, the tab on the right, and the New Role are highlighted.

IBM Training

Configure desktop administration role privileges



IBM Content Navigator Configuration

Figure 2-44. Configure desktop administration role privileges

The screen capture shows the New Role wizard. On the New Role page, you can configure the individual privileges that you want to grant to a set of Desktop administrators.

The available privileges are organized into categories. Example: General, Appearance, and Menu. The categories correspond to the tabs in the desktop administration UI. It also includes a role-based redaction category, which is separate from the desktop administration.

When you select a category or a subcategory, it selects all the items under that item.

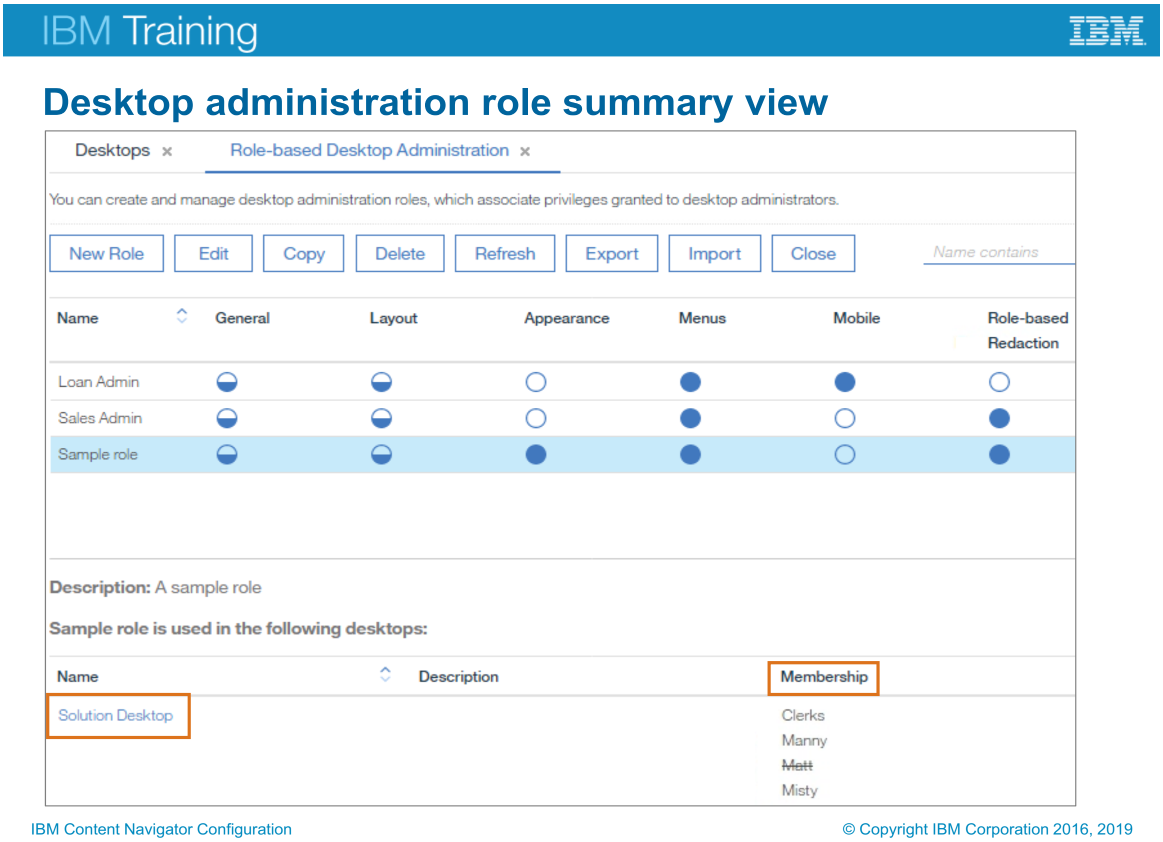


Figure 2-45. Desktop administration role summary view

The screen capture shows the summary of the privilege categories that are granted for each Desktop Administrator role.

Each column represents a tab in the desktop administration UI. The last column represents the role-based redaction category.

The circle icon represents the level of privileges in a category that are granted:

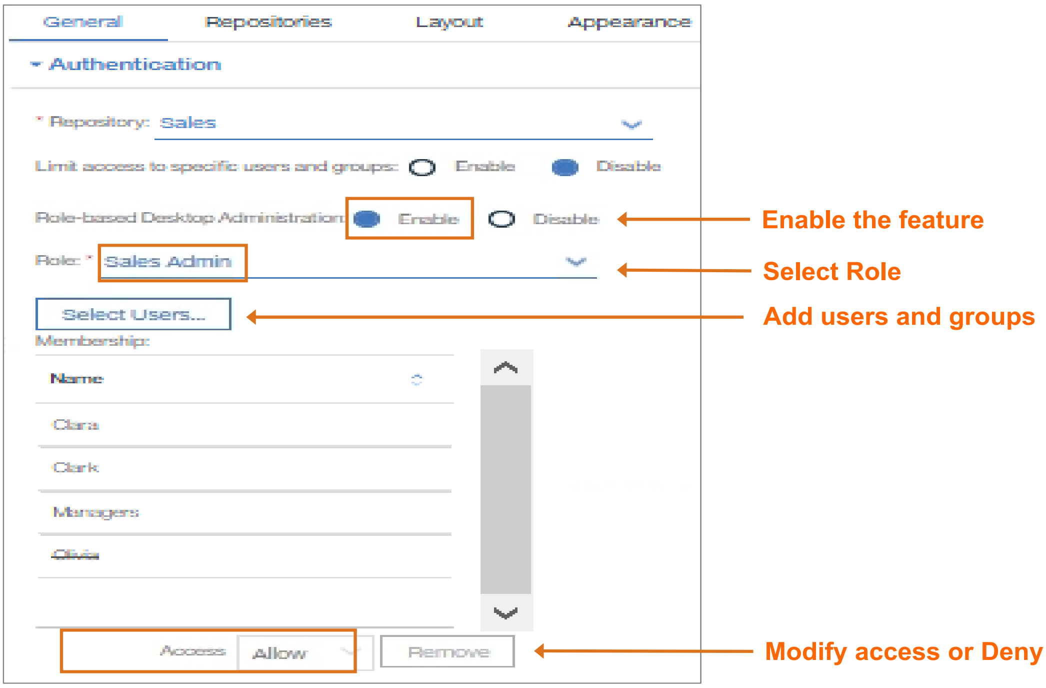
- Full circle: All privileges
- Half circle: Some privileges
- Empty circle: No privileges

When you select a role in the list, you can view more details for that role:

- The desktops to which the role is applied
- The desktop administrators for each desktop
  - Can be a user or a group
  - A strike on a name indicates that the access is denied
- The desktop link to open the desktop configuration page

IBM Training

Configure role-based administration on the desktop



IBM Content Navigator Configuration

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Figure 2-46. Configure role-based administration on the desktop

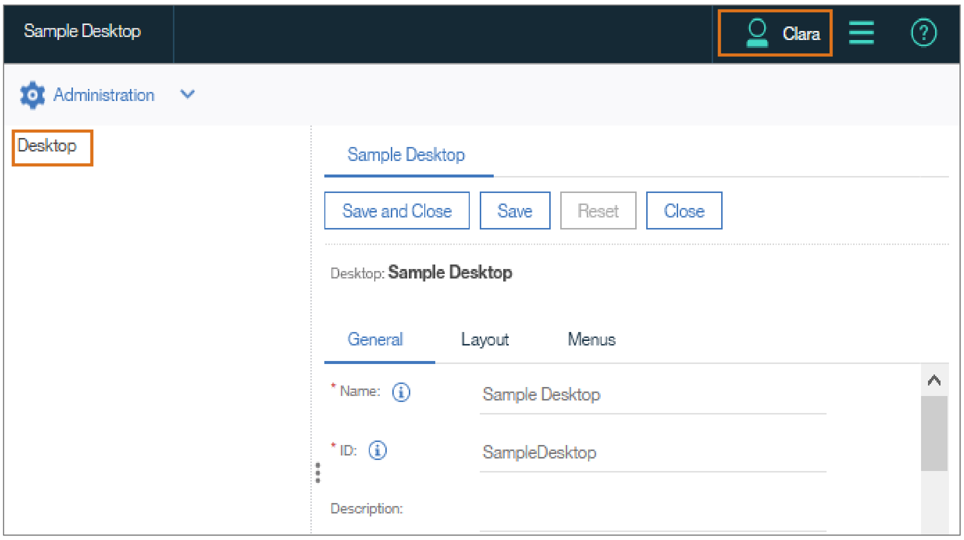
The screen capture shows the settings for the Role-based administration on the desktop configuration page.

High-level steps:

- Enable the feature
- Select a role (from the roles that you created for desktop administration)
- Add users and groups as desktop administrators for this desktop
- Modify the access (allow or deny)
- Remove the existing users and groups

IBM Training

A desktop administrator view



IBM Content Navigator Configuration

Figure 2-47. A desktop administrator view

The screen capture shows the view when a desktop administrator logs in to the IBM Content Navigator desktop.

- User sees the administration feature (gear icon), if granted desktop administrator access.
- When the user selects the administration feature (gear icon), the page shows Desktop and any other features that are based on their privileges.

Notes:

- The Desktop name, ID, and description fields, and the list of desktop administrators are read-only.
- Other desktop features are shown or hidden depending on privileges that are granted by the role.

IBM Training

Unit summary

- Learn about IBM Content Navigator administration tool
- 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

IBM Content Navigator Configuration

Figure 2-48. Unit summary

IBM Training

Review questions

1. True or False: To configure an IBM Content Navigator system to access the content in an IBM FileNet Content Manager (P8) repository, you need the URL for the Content Platform Engine server
2. The human resources (HR) department needs a custom IBM Content Navigator (ICN) desktop that is created for managing any HR-related content and processes. One of the requirements is that only members of HR can access the desktop. Which of the following ICN configurations allows only HR group members access?
   A. Ensure that the desktop is not configured as the default desktop
   B. Enable the limit access to specific users and groups option for the desktop
   C. Set the repository security to allow access to only specified users
   D. Modify the access control list on the site preferences to include only specified users

IBM Content Navigator Configuration

Figure 2-49. Review questions

Write your answers here:

1.

2.

3.

IBM Training

Review answers

1. True or False: To configure an IBM Content Navigator system to access the content in an IBM FileNet Content Manager (P8) repository, you need the URL for the Content Platform Engine server.
   The answer is True.
2. The human resources (HR) department needs a custom IBM Content Navigator (ICN) desktop that is created for managing any HR-related content and processes. One of the requirements is that only members of HR can access the desktop. Which of the following ICN configurations allows only HR group members access?
   A. Ensure that the desktop is not configured as the default desktop
   B. Enable the limit access to specific users and groups option for the desktop
   C. Set the repository security to allow access to only specified users
   D. Modify the access control list on the site preferences to include only specified users
   The answer is B.

IBM Content Navigator Configuration

Figure 2-50. Review answers

IBM Training

Review questions

3. True or False: Teamspaces provide a focused view of the relevant documents, folders, and searches that the team needs to complete their tasks.
4. Cross-repository search is supported for which of the following repositories? (Select all that apply)
   A. IBM Wave Linux repositories
   B. IBM Content Manager
   C. IBM Content Manager OnDemand
   D. IBM FileNet Content Manager
5. True or False: When you use role-based administration, it increases the backlog for the global IT department.

IBM Content Navigator Configuration

Figure 2-51. Review questions

Write your answers here:

1.

2.

3.

IBM Training

Review answers

3. True or False: Teamspaces provides a focused view of the relevant documents, folders, and searches that the team needs to complete their tasks.
   The answer is True.
4. Cross-repository search is supported for which of the following repositories? (Select all that apply)
   A. IBM Wave Linux repositories
   B. IBM Content Manager
   C. IBM Content Manager OnDemand
   D. IBM FileNet Content Manager
   The answer is B, C, and D.
5. True or False: When you use role-based administration, it increases the backlog for the global IT department.
   The answer is False.

IBM Content Navigator Configuration

Figure 2-52. Review answers

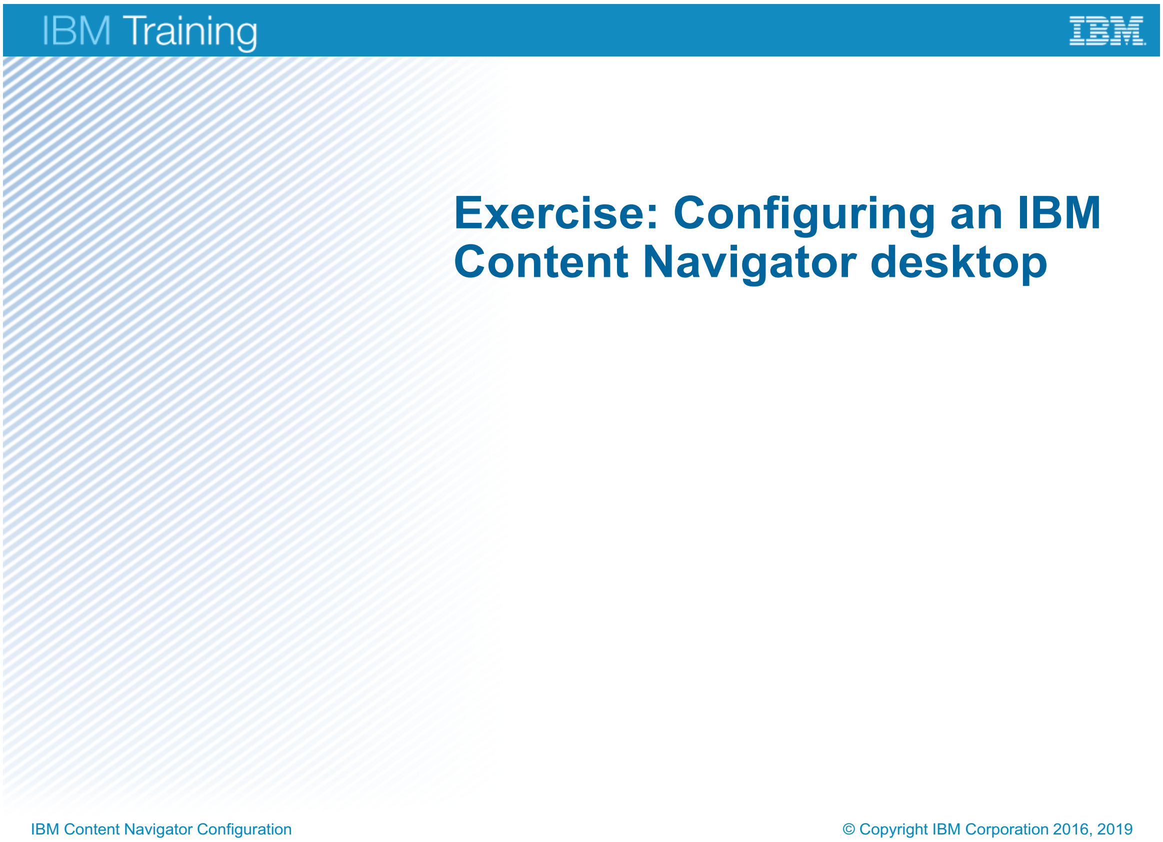


Figure 2-53. Exercise: Configuring an IBM Content Navigator desktop

IBM Training

Exercise objectives

- 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

IBM Content Navigator Configuration

Figure 2-54. Exercise objectives

Unit 3. Customizing an IBM Content Navigator Desktop

Estimated time

02:00

Overview

This unit shows you how to customize various components for an IBM Content Navigator desktop.

How you will check your progress

- Review
- Exercise

References

https://www.ibm.com/support/knowledgecenter/SSEUEX_3.0.6/com.ibm.installingeuc.doc/eucco114.htm

https://www.ibm.com/support/knowledgecenter/SSEUEX_3.0.6/com.ibm.installingeuc.doc/eucco004.htm

IBM Training

Unit objectives

- Customize a desktop banner, login page, and theme
- Modify menus, icons, and labels
- Create a viewer map
- Register a plug-in

Customizing an IBM Content Navigator Desktop

Figure 3-1. Unit objectives

IBM Training

Topics

- Customize a desktop banner, login page, and theme
- Modify menus, icons, and labels
- Create a viewer map
- Register a plug-in

Customizing an IBM Content Navigator Desktop

Figure 3-2. Topics

3.1. Customize a desktop banner, login page, and theme

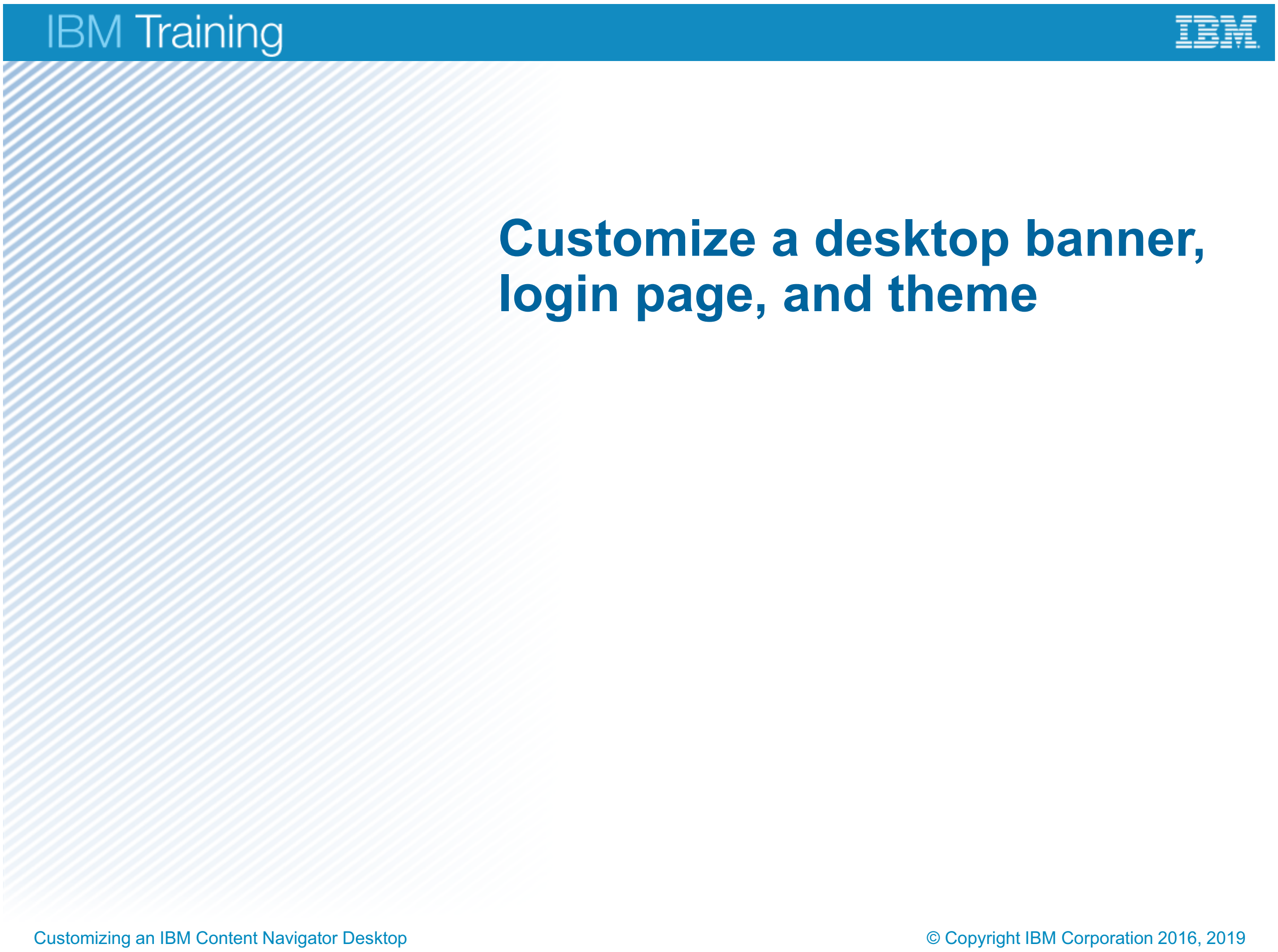


Figure 3-3. Customize a desktop banner, login page, and theme

IBM Training

Customize the desktop appearance

- IBM Content Navigator provides a default theme for the user interface.
  - You can customize the themes.
- You can customize a desktop in the Administration tool in the following ways:
  - Add your company logo to both the login page and banner of the desktop
  - Include useful notes to the login page
  - Change the color of the desktop banner
  - Add or remove features from the desktop
  - Modify the menu options on both the toolbar and the context menus
  - Change icons
  - Edit the lists of properties available for search and browse
  - Alter the labels that are used in the desktop

Customizing an IBM Content Navigator Desktop

Figure 3-4. Customize the desktop appearance

IBM Training

Custom themes

- The theme determines the overall appearance, such as fonts, images, and colors.
  - Create a theme with a color scheme and images that are specific to your organization
  - Modify the banner and login page
- The IBM Content Navigator includes a default theme and several predefined themes
  - You can use the themes to change the appearance of your desktop
  - Make a copy of a predefined theme to create your own customized theme
  - Apply different themes for different users

Customizing an IBM Content Navigator Desktop

Figure 3-5. Custom themes

Example to apply different themes to different desktops:

- A service provider with several clients can create a desktop for each client company, applying a theme with a unique color palette and icons for each client company.
- An administrator can create one desktop for users with edit access and another desktop for users with read-only access and apply customized themes for each.

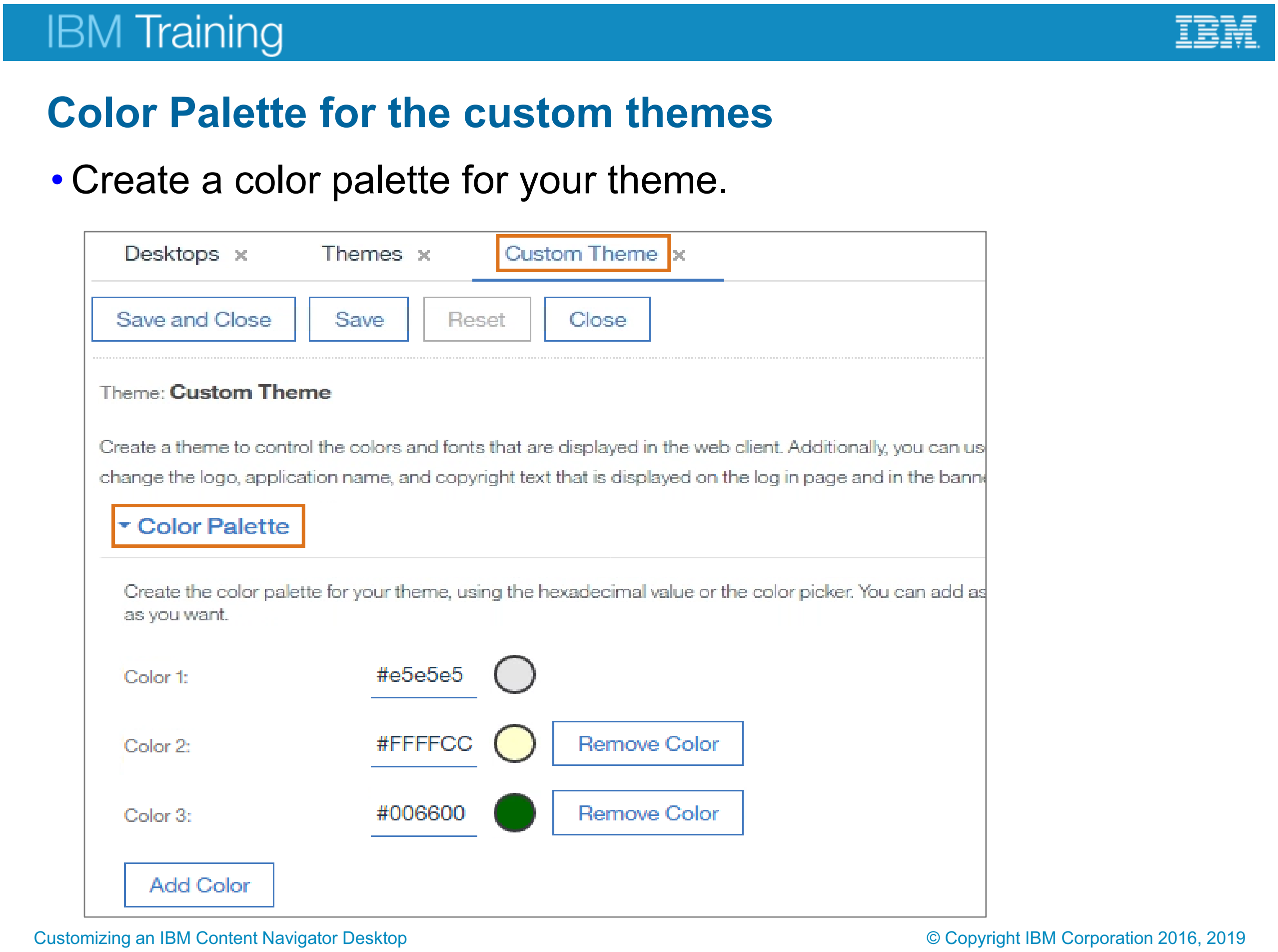


Figure 3-6. Color Palette for the custom themes

The screen capture shows the Color Palette for the custom themes in IBM Content Navigator.

Color Palette for the custom themes

- Add as many colors as you want to your color palette.
- For each color, either enter the hexadecimal value that represents the color, such as #FFFFFF for white, or click the circle to use the color picker.
- After you add colors to the color palette, the colors are automatically added to the selection list for background color and text color.
- If you select `default` for a text color, the color is determined by calculating the color value that is complementary to the background color.

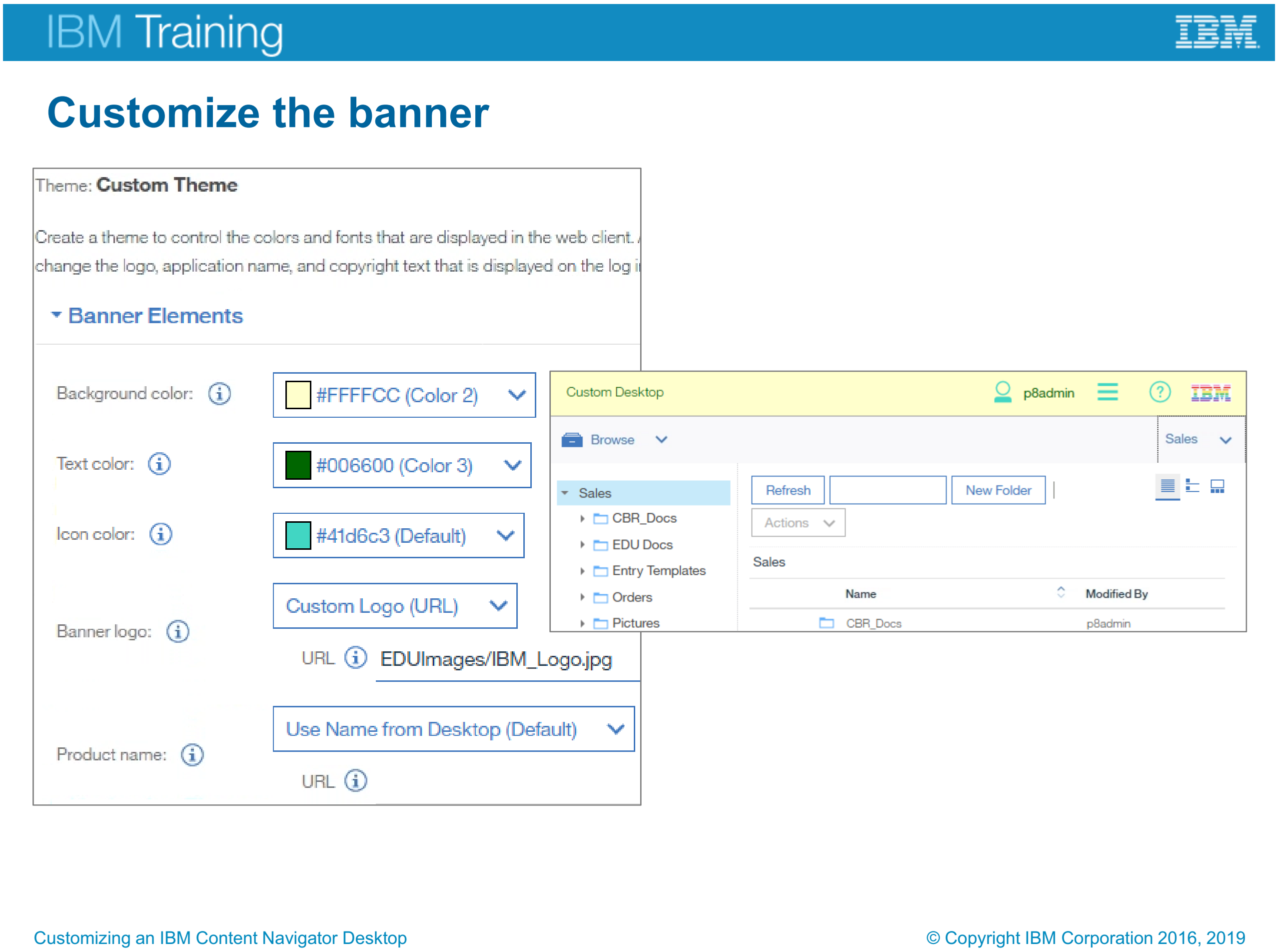


Figure 3-7. Customize the banner

The left screen capture shows the Banner Elements section for a custom theme in the IBM Content Navigator administrator desktop. The right screen capture shows the customized Banner in an IBM Content Navigator user desktop. The background color (yellow), text color (green), icon color (turquoise color), and a new IBM logo are customized for the banner.

You can define the following banner elements without any custom code: Background color, fill style, text and icon color, logo, and product name.

URL for logos

Use a URL reference for the logos.

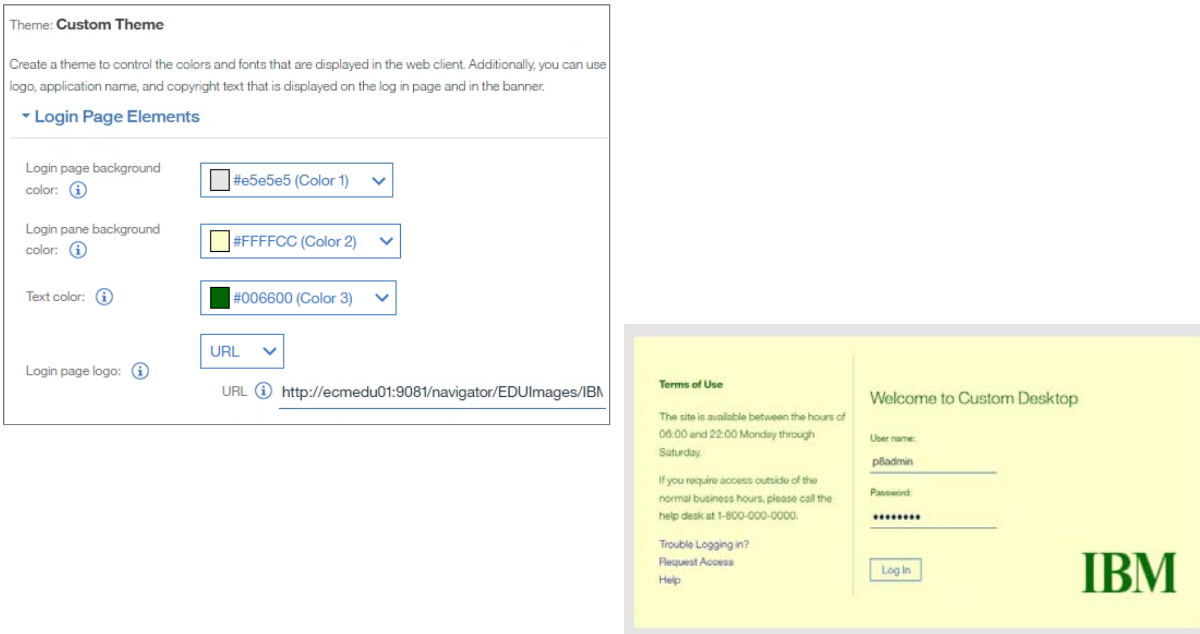
- If the image file is deployed on the same application server as the IBM Content Navigator client application, you can enter a relative path. Example: EDUImages/IBM_Nav_logo.png
- You can also create a web application and add your logos to the web content folder.
  - If you deploy it in a highly available configuration, enter a fully qualified path that is available to all instances of IBM Content Navigator.
  - Example: http://<server_name>/<application name> /<file name>

Image for logos

- The image must be no larger than 72 pixels wide and 32 pixels high.
- The IBM banner logo in IBM Content Navigator is 72 x 24 pixels.
- The logo image must have a transparent background.

IBM Training

Customize the login page



Customizing an IBM Content Navigator Desktop

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Figure 3-8. Customize the login page

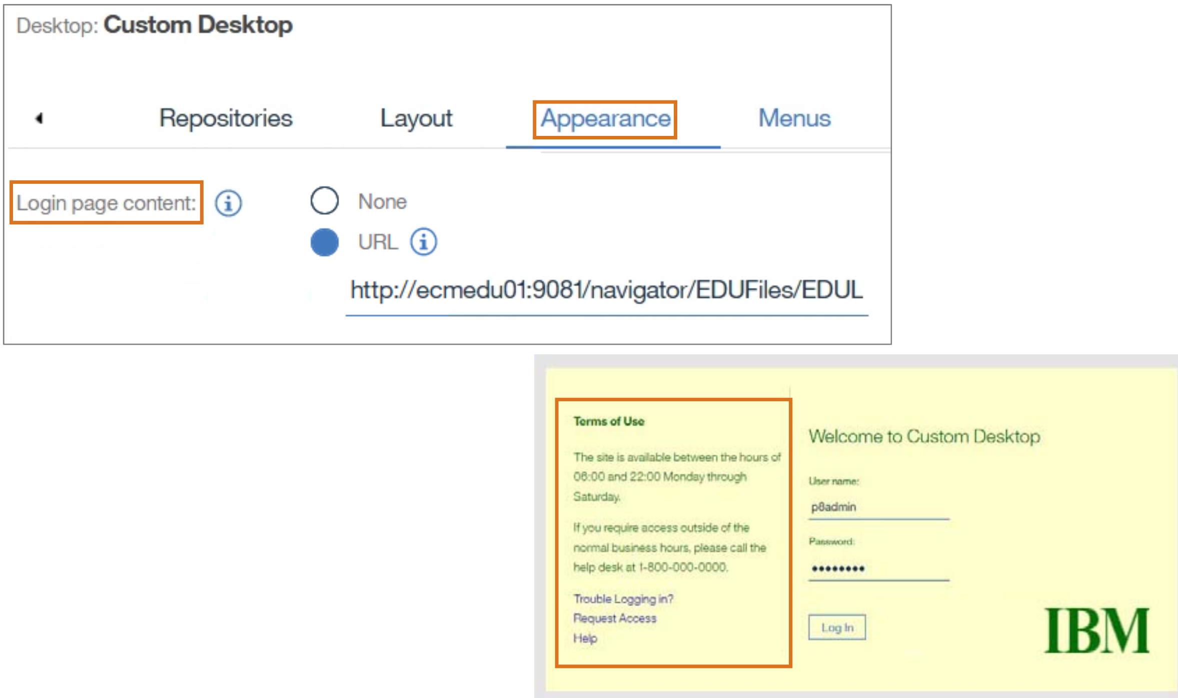
The left screen capture shows the Login Page Elements section for a custom theme in the IBM Content Navigator administrator desktop. The right screen capture shows the customized Login page in an IBM Content Navigator user desktop. The Login page background color (gray), The Login pane background color (yellow), text color (green), and a new IBM logo are customized for the login page.

URL for login logo

- A URL references the new logo.
- If the file is deployed on the same application server as the IBM Content Navigator client application, enter a relative path.
- You can also create a web application and add your files to the web content folder.
- The size of the logo can be 150 x 112 pixels.
- The logo image must have a transparent background.

IBM Training

Add custom text to the login page



Customizing an IBM Content Navigator Desktop

Figure 3-9. Add custom text to the login page

The upper screen capture shows the Appearance tab for a custom desktop configuration in the IBM Content Navigator administrator desktop. For the custom login page content, a URL for an html page is provided. The lower screen capture shows the customized login page in an IBM Content Navigator user desktop. The custom text for the login page is marked by the red rectangle.

URL for login page content

- A URL references the content file.
- If the file is deployed on the same application server as the Content Navigator web client application, you can enter a relative path.
- You can also create a web application and add your files to the web content folder.

Login page content

You can add content to the login page to provide information to users when they access IBM Content Navigator.

- Examples of information:
  - Guidance about the use of the system
  - Help desk contact procedures
  - Any planned downtime for system maintenance

- To add login page content, prepare an HTML file that contains the information that you want.
- If you deploy it in a highly available configuration, enter a fully qualified path that is available to all instances of IBM Content Navigator.
- Example: http://<server_name>/<application name> /<file name>

3.2. Modify menus, icons, and labels

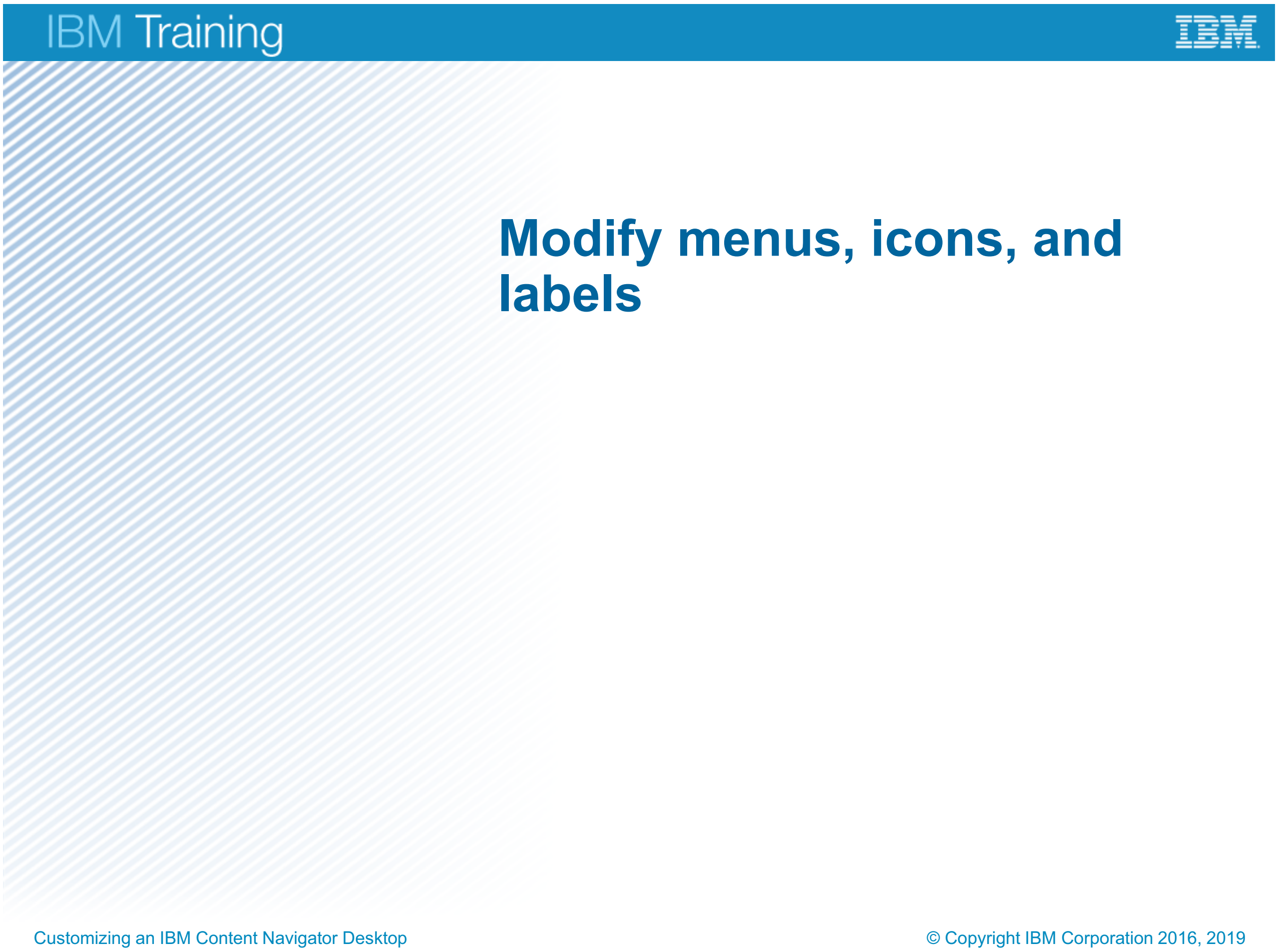
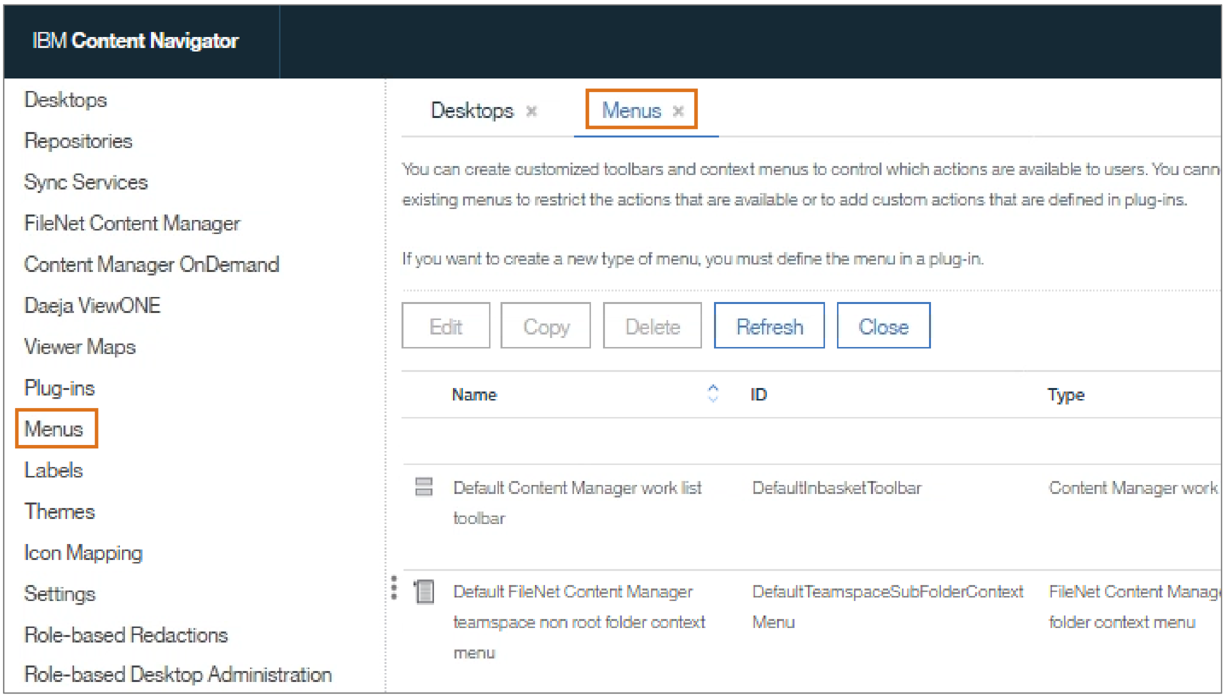


Figure 3-10. Modify menus, icons, and labels

IBM Training

IBM Content Navigator menus



Customizing an IBM Content Navigator Desktop

Figure 3-11. IBM Content Navigator menus

The screen capture shows the Menus tab on the IBM Content Navigator administration desktop. It includes default menus.

- You cannot edit the default menus. You can create copies of the default menus and modify them.
- The IBM Content Navigator administrators can limit the actions that users can take from the existing menus.
- Some of the modifications to the menus can be done without writing any code.
- Developers can create new menus and toolbars as plug-ins and administrator can register the plug-ins in Content Navigator.
- You can create multiple menus and associate each menu with a subset of the desktops in your environment.
- Customizing menus and labels creates specific solutions for your application.

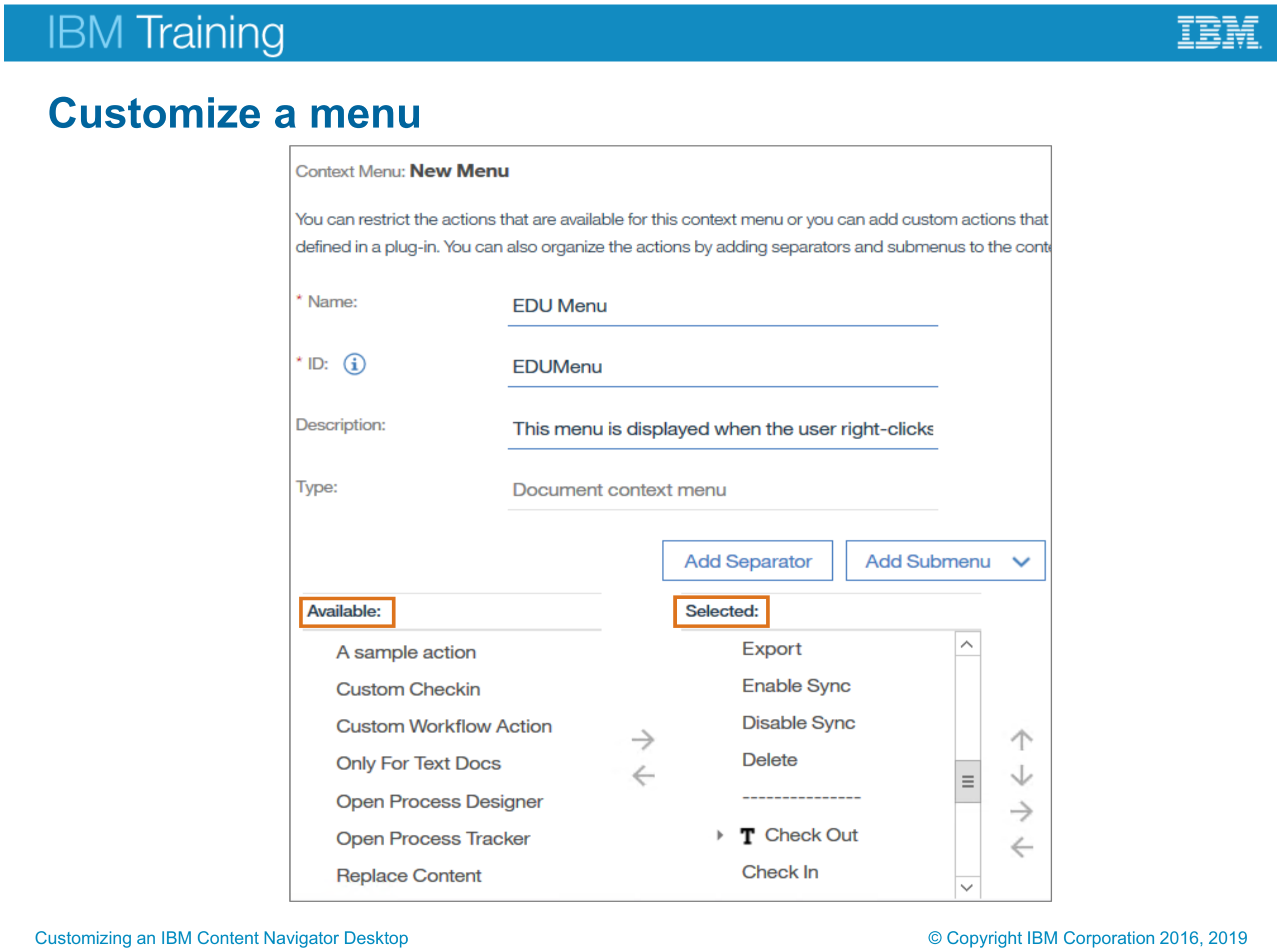


Figure 3-12. Customize a menu

The screen capture shows the new menu that is opened for customizing in IBM Content Navigator.

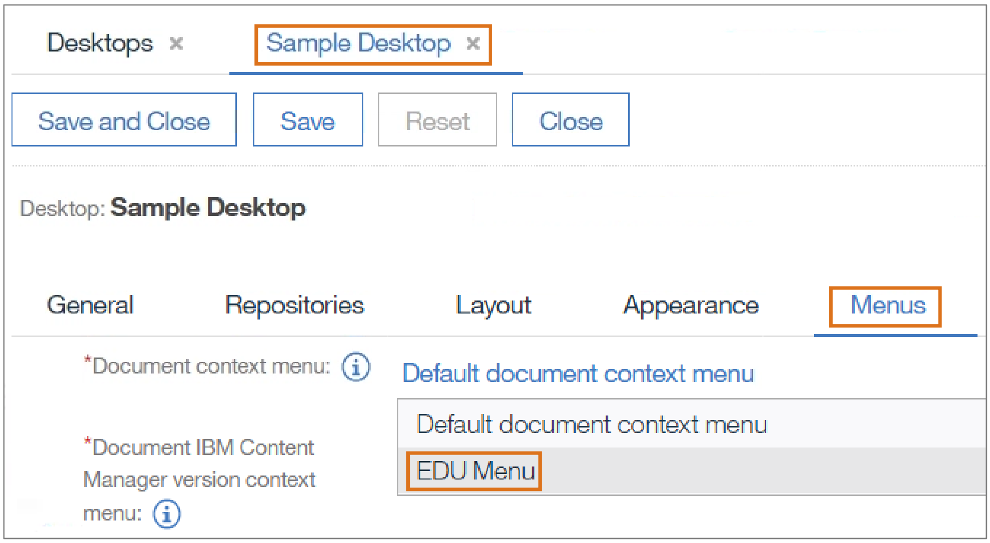
Customize a Menu

You can modify the following items to customize a menu:

- Restrict the actions that are selected for a menu by removing the actions from the Selected pane.
- Add custom actions that are defined in a plug-in by moving the items from the Available to the Selected pane.
- Organize the actions by adding separators and submenus to the menu.

IBM Training

Associate a custom menu to a desktop



Customizing an IBM Content Navigator Desktop

Figure 3-13. Associate a custom menu to a desktop

The screen capture shows a sample IBM Content Navigator desktop that is opened for editing. A custom menu is selected.

Add the Custom Menu to a desktop

- Edit the IBM Content Navigator desktop to associate a custom menu.
- On the Menus tab, select your custom menu instead of the default menu and save the changes.
- The custom menu is now available for the desktop users.

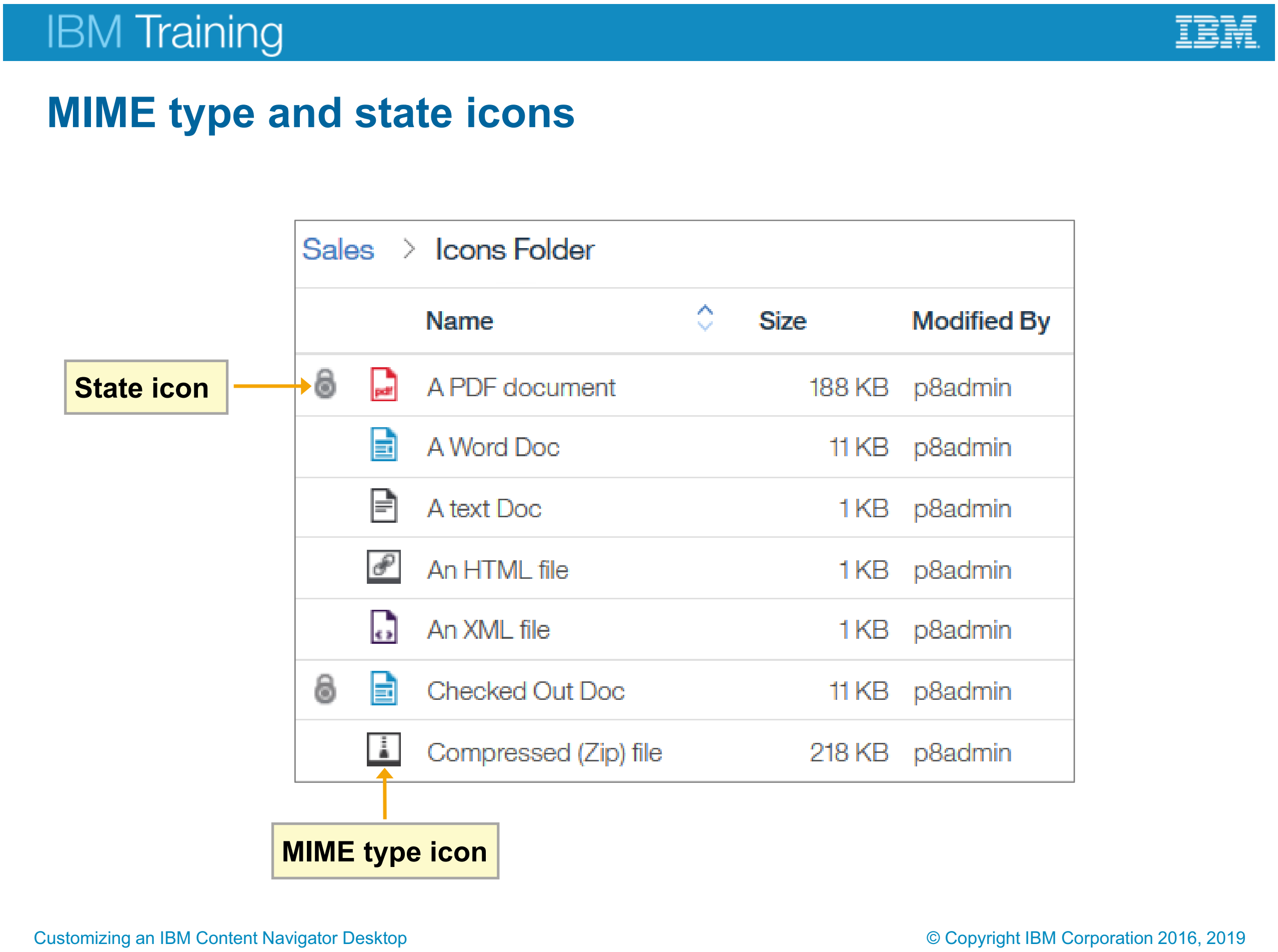


Figure 3-14. MIME type and state icons

The screen capture shows a list of documents on the Browse page in IBM Content Navigator. Each document has an icon in front of its name to indicate its MIME type.

MIME types indicate the type of document. Examples: PDF, Word (.docx), Text (.txt), HTML, XML, and compressed file (.ZIP)

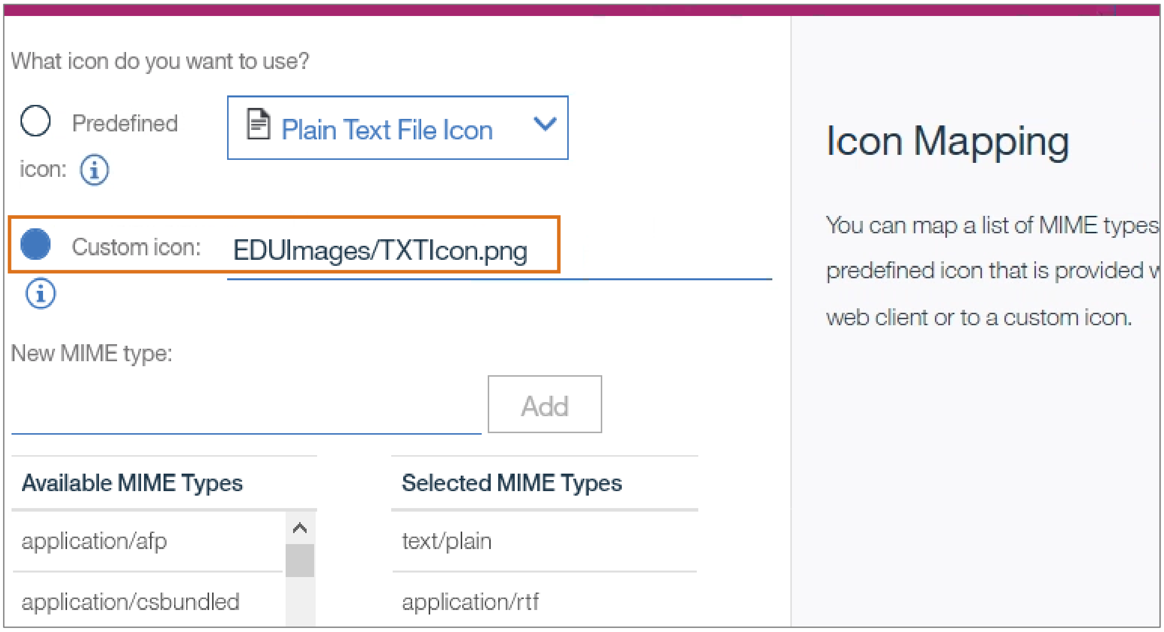
In addition, some documents have a lock icon to indicate that it is checked out. The lock icon is an example for a State icon.

IBM Content Navigator provides predefined icons for document MIME types and for item States.

- You can change the icons that are shown for MIME types and item States.
- The changes that you make apply to all of the desktops in your environment.

IBM Training

Edit an existing icon mapping for MIME Types



Customizing an IBM Content Navigator Desktop

Figure 3-15. Edit an existing icon mapping for MIME Types

The screen capture shows the Icon Mapping page for the MIME types in IBM Content Navigator. The example shows a custom icon option and the location of the image for the custom icon.

Edit an existing Icon Mapping for MIME Types

You can edit an existing Icon Mapping to associate a new icon to a MIME type.

- In the IBM Content Navigator administration desktop, click Icon Mapping from the navigation pane.
- On the Icon Mapping tab, select an existing MIME type from the list.
- Click Edit to map a MIME type to a predefined icon or to a custom icon.
- Save the settings.

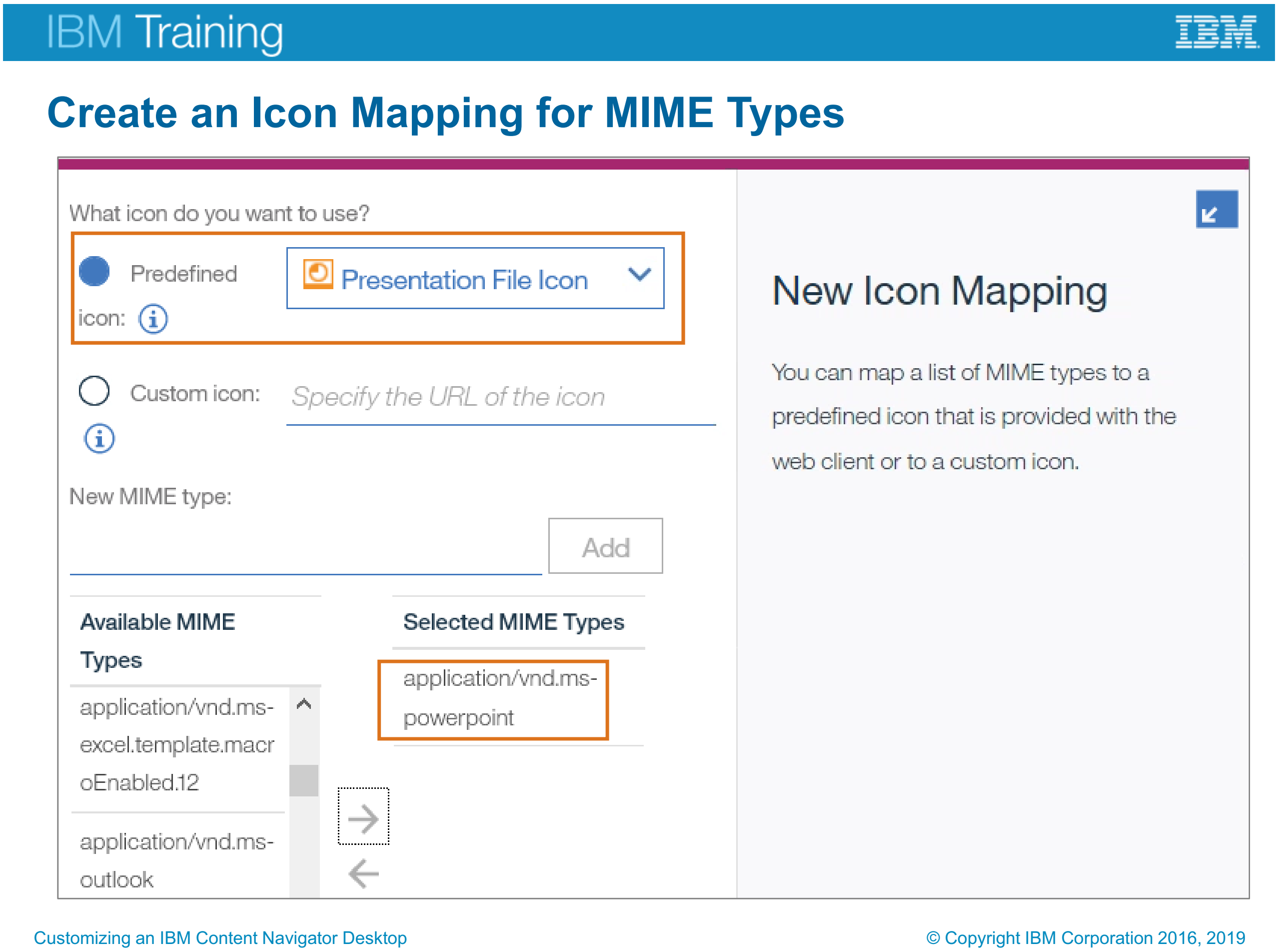


Figure 3-16. Create an Icon Mapping for MIME Types

The screen capture shows the New Icon Mapping page for MIME types in IBM Content Navigator. The example shows a predefined icon option with a value for the Presentation File Icon. The application/vnd.ms-powerpoint MIME type is shown in the Selected MIME Types pane.

- You can create Icon Mappings to associate an icon to a new MIME type.
- You can map a list of MIME types to a predefined icon that is provided with IBM Content Navigator or to a custom icon.
- You can associate more than one icon for a MIME type. If a MIME type has more than one Icon Mapping, the first icon in the list is used.

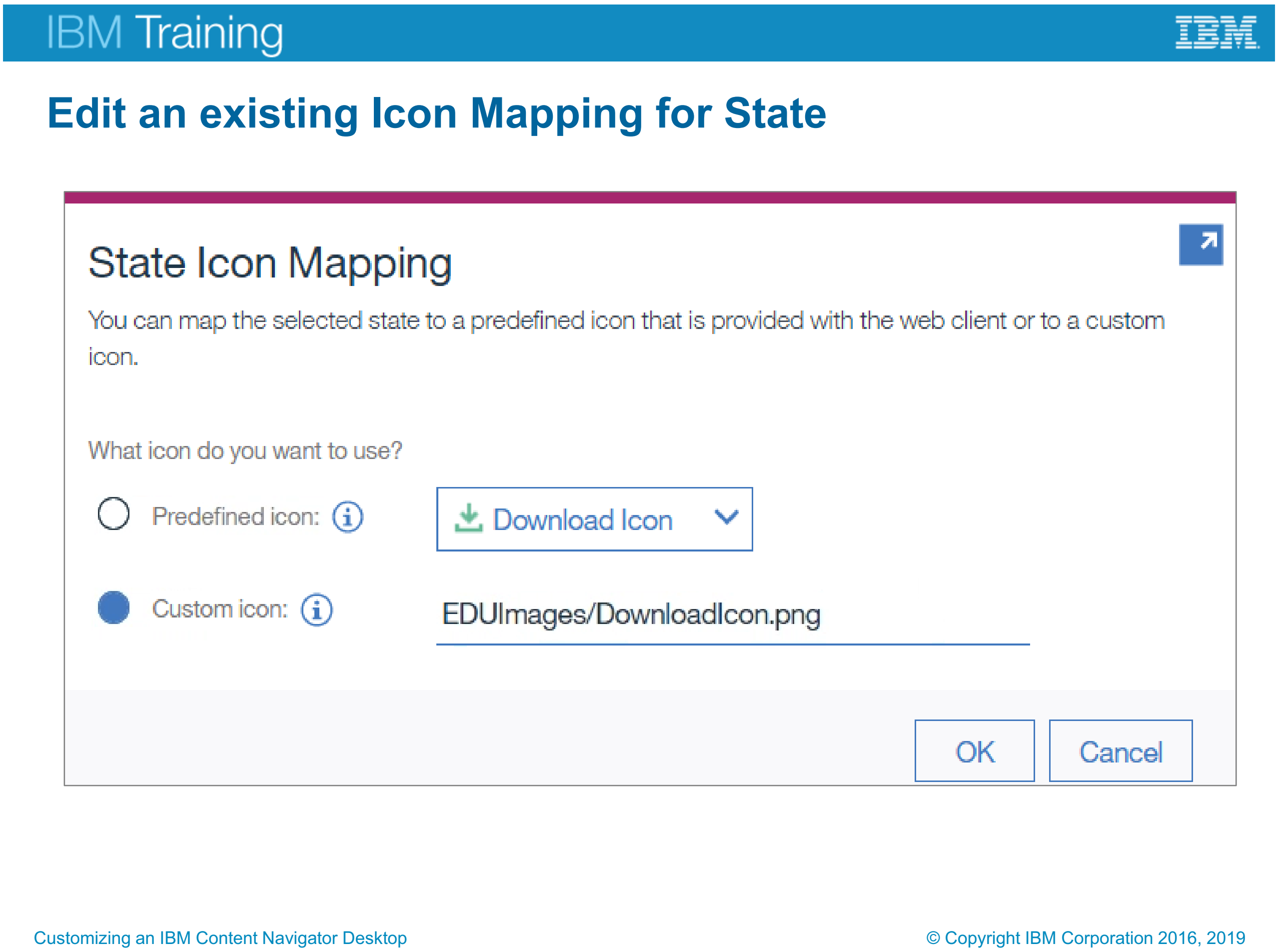


Figure 3-17. Edit an existing Icon Mapping for State

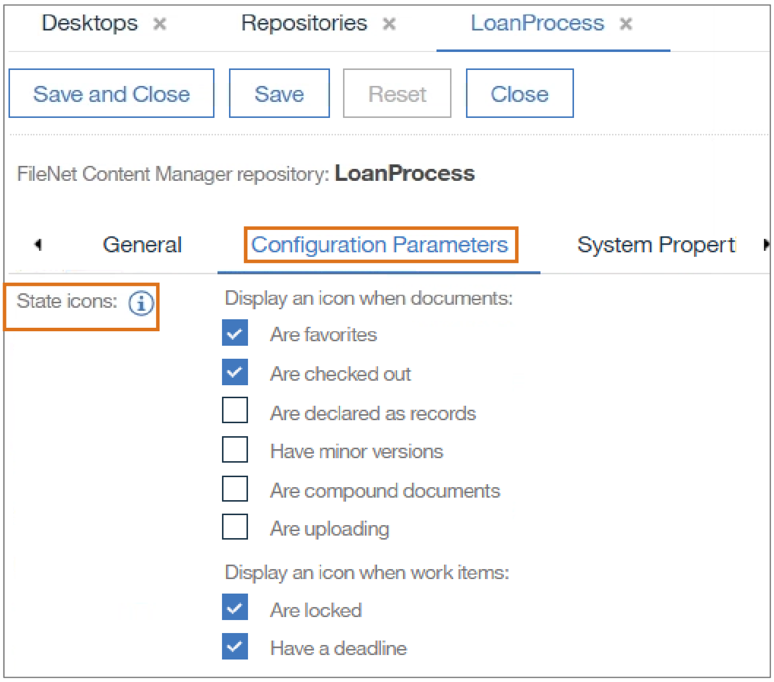
The screen capture shows the State Icon Mapping page for the item states in IBM Content Navigator.

You can edit an existing Icon Mapping to associate a new icon to a State of documents or folders and work items.

- In the IBM Content Navigator Administration desktop, click Icon Mapping from the navigation pane.
- On the Icon Mapping tab, select an existing State icon from the list.
- Click Edit to map a State to a predefined icon or to a custom icon.
- Save the settings.

IBM Training

Enable the State icons



Customizing an IBM Content Navigator Desktop

Figure 3-18. Enable the State icons

The screen capture shows the configuration page for a FileNet Content Manager repository in IBM Content Navigator. On the Configuration Parameters tab, you can enable a list of state icons to display for the documents.

IBM Training

Customize labels

- You can customize the following types of label in IBM Content Navigator:
- Desktop Labels
  - Changes that are made to the Labels apply to specific desktops.
- Application Labels
  - Changes that are made to the Labels apply to all the desktops in your environment.
- System Property Labels
  - Changes that are made to the Labels apply to all the desktops in your environment.

Customizing an IBM Content Navigator Desktop

Figure 3-19. Customize labels

Customizing the labels are useful when users wants to use their own terminology. Each locale can have its own label text.

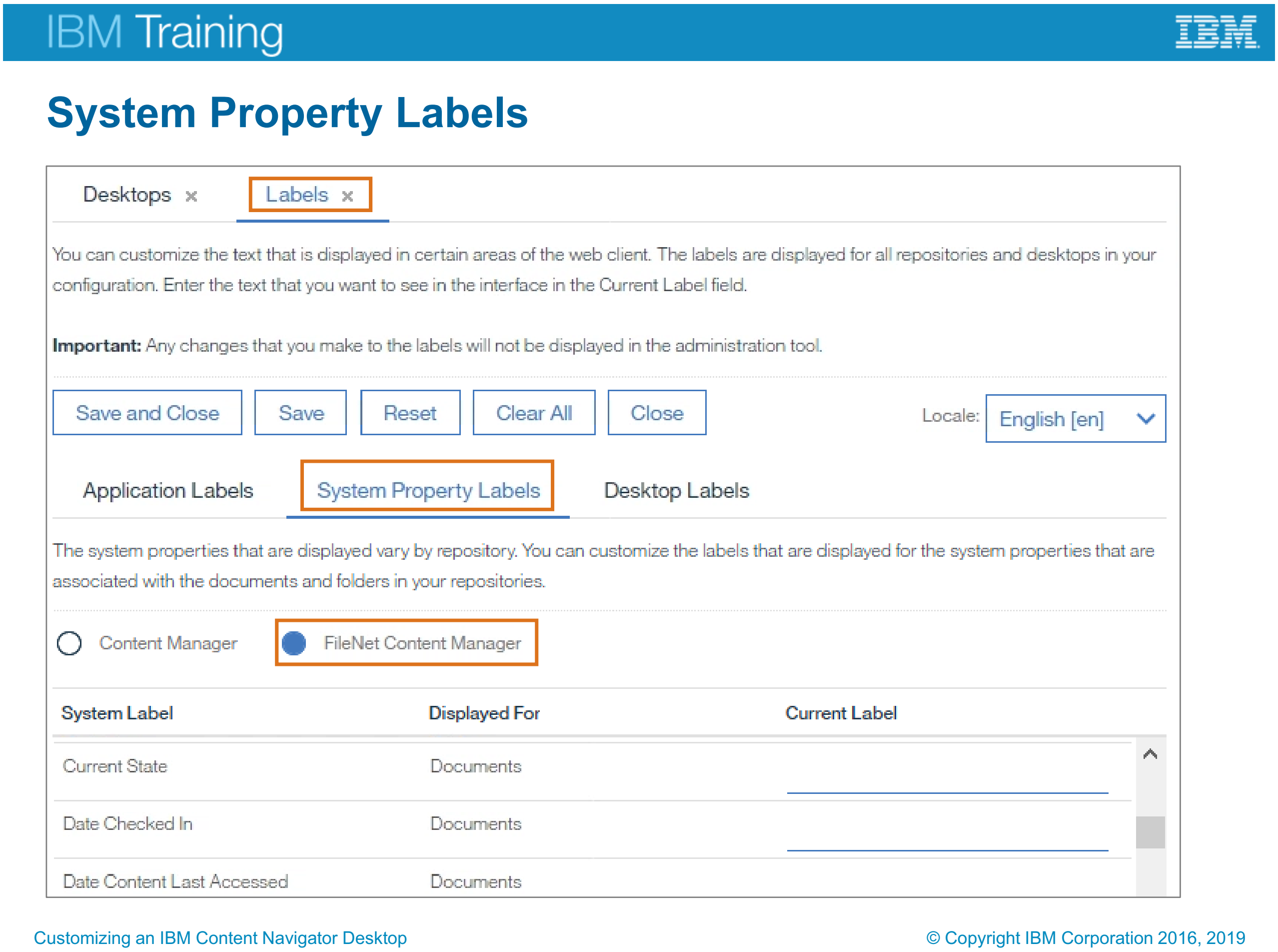


Figure 3-20. System Property Labels

The screen capture shows the Labels > System Property Labels subtab in the IBM Content Navigator administrator desktop. The FileNet Content Manager repository is selected.

Edit System Property Labels

- The repositories use System Property Labels that show on desktops.
- You can customize the labels for the system properties that are associated with the documents and folders in your repositories and work items.
- Any changes that you make to the system property display names in the web client do not affect the property names and values that are configured on your repository.
    - Select the repository type for which you want to edit the label.
    - Observe the default label.
    - Enter a new label in the Current column.
    - Save the changes.

3.3. Create a viewer map

IBM Training

Create a viewer map

Customizing an IBM Content Navigator Desktop

Figure 3-21. Create a viewer map

IBM Training

What are viewer maps?

- Viewer maps specify which viewer is used to open each file type.
- The IBM Content Navigator Administration tool includes a default viewer map.
  - It provides separate viewer mappings for each repository type.
- You can create a custom viewer map for the following tasks:
  - Use a different viewer for a file type
  - Add more file types to the mapping
  - Create one or more viewer maps
- You can associate a different viewer map with each desktop

Customizing an IBM Content Navigator Desktop

Figure 3-22. What are viewer maps?

The IBM Content Navigator Administration tool includes a default viewer map. You cannot edit the default viewer map. You can create copies of the default viewer map and customize it.

Custom Viewers

You can create custom viewers programmatically as plug-ins and associate them with IBM Content Navigator desktops.

IBM Training

Fallback Viewers

- Each viewer supports a specific set of file types.
  - Some viewers are not supported on every server or client system that IBM Content Navigator supports.
- IBM Content Navigator can automatically select a different viewer to use if a viewer included in your viewer map fails to open a document.
  - This behavior is called the Fallback behavior.
  - The second viewer is called a Fallback viewer.
  - You can include multiple Fallback Viewers in your viewer map.

Customizing an IBM Content Navigator Desktop

Figure 3-23. Fallback Viewers

IBM Training

Viewers that support all file types

- Some viewers support only specific file types
  - Example: Adobe Reader supports PDF type
- Some viewers support all file types
  - Example: Web Browser

Customizing an IBM Content Navigator Desktop

Figure 3-24. Viewers that support all file types

IBM Training

Create a viewer map

- You can create a viewer map to associate a viewer to a file type.

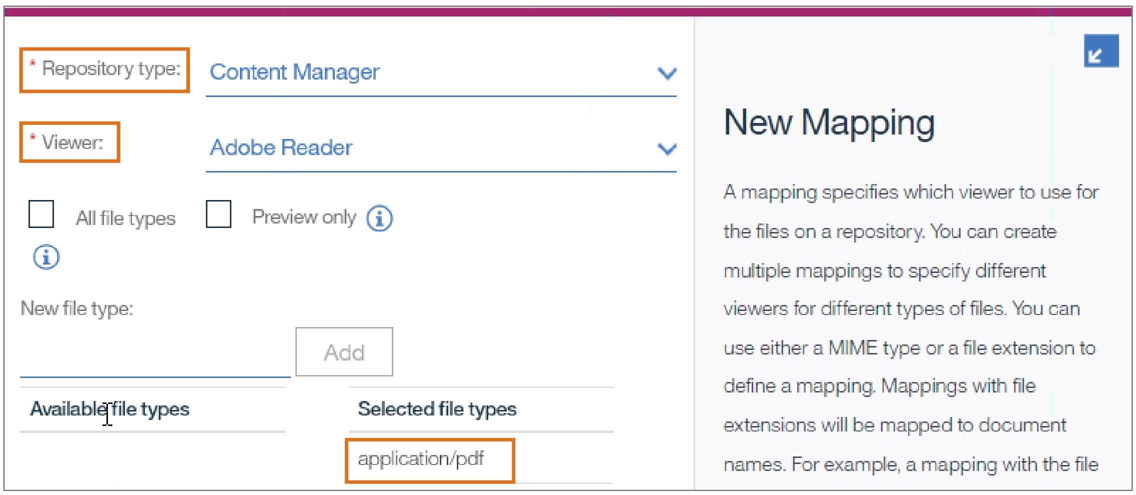


Figure 3-25. Create a viewer map

The screen capture shows the New Mapping page for MIME types in IBM Content Navigator.

You can create a viewer map to associate a viewer to a MIME type.

- In the Content Navigator Administration tool for the web client, select Viewer Maps.
- On the Viewer maps tab, select New Viewer Map.
- Provide a name for the new viewer map.
- Click New Mapping to map a file type to a viewer.
- Specify the repository for this mapping.
- Select the viewer.
- Select the file types.
- Save the settings.

You can create multiple mappings for a viewer map.

You can also edit the existing mapping to add or remove a file type.

IBM Training

Associate a viewer map with a desktop

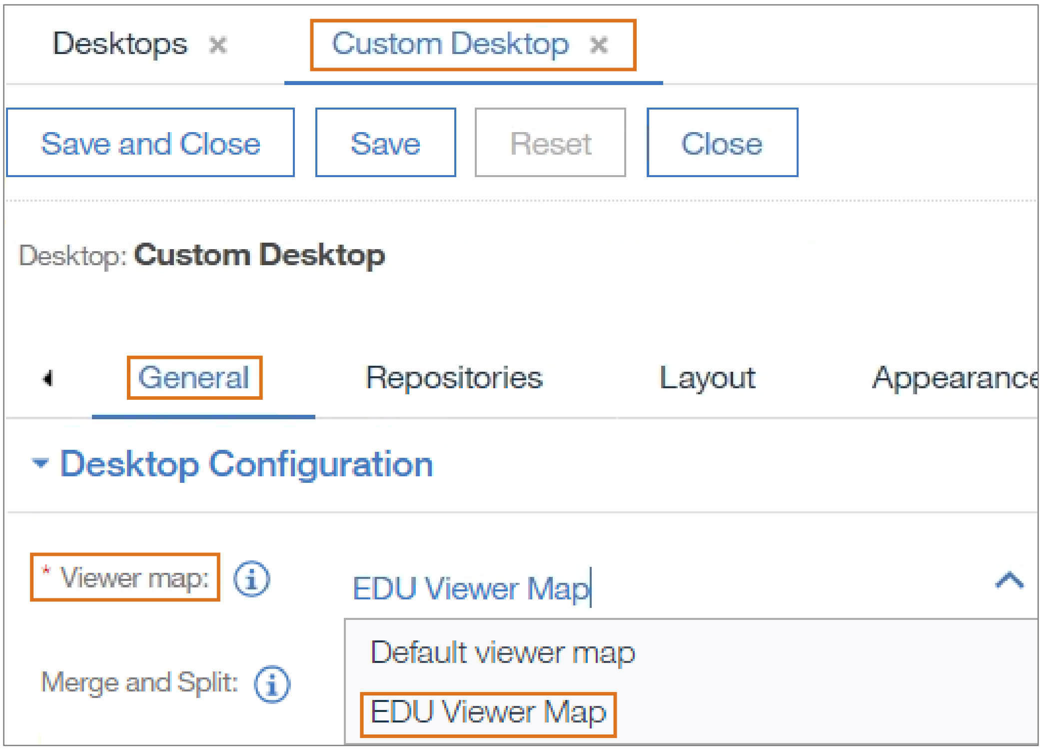


Figure 3-26. Associate a viewer map with a desktop

The screen capture shows the configuration of an IBM Content Navigator desktop (Custom Desktop).

On the General tab, a custom viewer map (EDU Viewer Map) is selected instead of the default viewer map.

After the changes are saved, the desktop uses the custom viewer map.

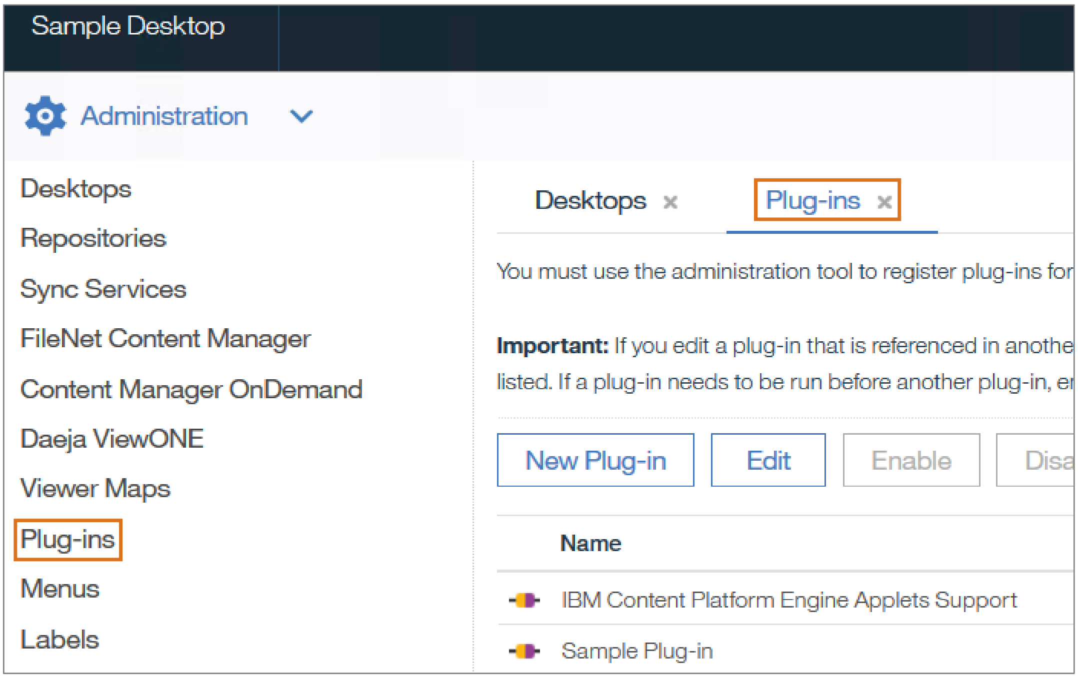
3.4. Register a plug-in

Figure 3-27. Register a plug-in

IBM Training

IBM Content Navigator plug-ins

- Use plug-ins to customize the IBM Content Navigator client.



Customizing an IBM Content Navigator Desktop

Figure 3-28. IBM Content Navigator plug-ins

The screen capture shows the plug-ins tab on the IBM Content Navigator administration desktop.

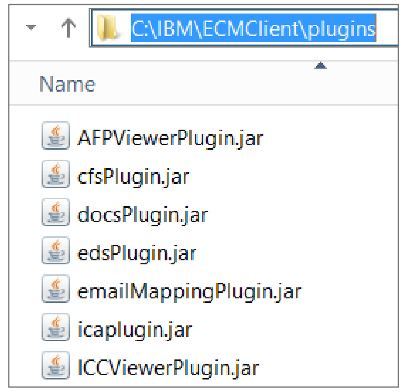
You can extend the features and change the behavior of the IBM Content Navigator client with the use of plug-ins. For example, you can create a plug-in to add a menu action or to validate data entry.

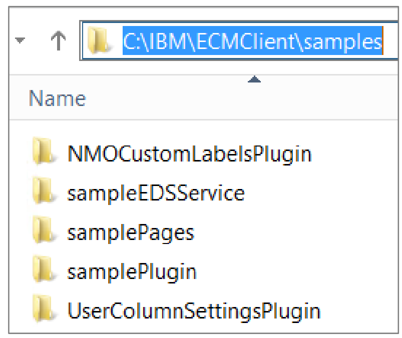
In this lesson, you learn how to register and configure the sample plug-in for the IBM Content Navigator client.

IBM Training

Custom plug-ins

- You can create plug-ins for the following uses:
  - New features and layouts
  - New menu items and toolbars
  - Viewers and services
- Examples of IBM Content Navigator provided plug-in samples:
  - Sample External data services plug-in (EDS)
  - Sample Plug-in includes sample feature, layout, viewers, and actions





Customizing an IBM Content Navigator Desktop

Figure 3-29. Custom plug-ins

The screen captures show the directory location and a list of available plug-ins. The upper screen capture lists the JAR files and lower screen capture shows the source code folders for the sample plug-ins.

The IBM Content Navigator software package includes several samples that you can use as a starting point to create custom plug-ins as required.

Examples of directory location for the samples (JAR files)

- Microsoft Windows: C:\Program Files (x86)\IBM\ECMClient\plugins
- Linux: /opt/IBM/ECMClient/plugins

Examples of directory location for the samples (source files)

- Microsoft Windows: C:\Program Files (x86)\IBM\ECMClient\samples
- Linux: /opt/IBM/ECMClient/samples
- There are more samples on GitHub: https://github.com/ibm-ecm/ibm-content-navigator-samples

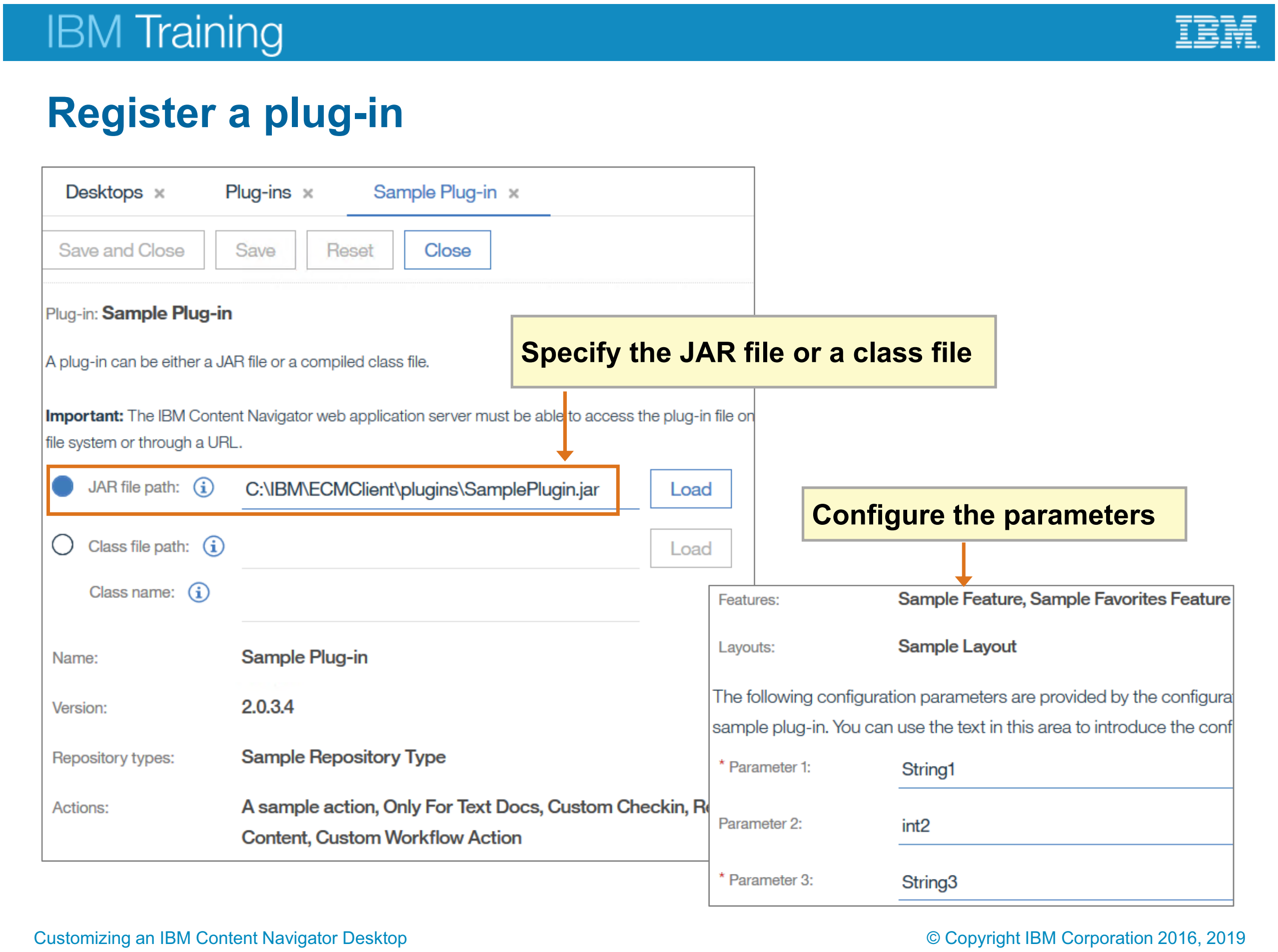


Figure 3-30. Register a plug-in

The screen capture shows the new plug-in page in IBM Content Navigator.

Steps to register a plug-in

1. On the Plug-ins page of the IBM Content Navigator administration tool, click New Plug-in, or Edit for an existing plug-in.
2. Load the plug-in file from the directory where it is located.
   - If the JAR file is in the local file system, enter the path.
   - If the JAR file is in a remote server, enter the URL for the plug-in.
3. You can also load a compiled class file from your local system.
   - Enter the plug-in file path (without the package name) in the Class file path field.
   - Enter the plug-in class name with the package name in the Class name field.
4. Configure the parameters.
   - The developer for the plug-in can optionally include input fields for entering configuration information.
   - Example: URL for the web application, server name.
   - Enter the required values. Save the settings.

IBM Training

Review questions

1. True or False: IBM Content Navigator default menus cannot be modified directly, the user must make a copy of a default menu, and customize the copy.

2. The payroll department of a company needs to provide their users access to view payroll documents without an easy way to download the documents to their systems. Which of the following configurations helps limit the download?
   A. Create a custom menu without the download menu item
   B. Develop a custom viewer
   C. Modify desktop access rights
   D. Edit the view content rights on the documents in the repository.

Customizing an IBM Content Navigator Desktop

Figure 3-31. Review questions

Write your answers here:

1.

2.

3.

IBM Training

Review answers

1. True or False: IBM Content Navigator default menus cannot be modified directly, the user must make a copy of a default menu, and customize the copy.
   The answer is True.

2. The payroll department of a company needs to provide their users access to view payroll documents without an easy way to download the documents to their systems. Which of the following configurations helps limit the download?
   A. Create a custom menu without the download menu item
   B. Develop a custom viewer
   C. Modify desktop access rights
   D. Edit the view content rights on the documents in the repository.

   The answer is A.

Customizing an IBM Content Navigator Desktop

Figure 3-32. Review answers

IBM Training

Review questions

3. You want to replace the default icon for the text/plain file type documents with a custom icon. Which of the following IBM Content Navigator features can you use to change the icon?
   A. MIME Type Mapping
   B. Custom plug-ins
   C. Icon Mapping
   D. Themes

Customizing an IBM Content Navigator Desktop

Figure 3-33. Review questions

Write your answers here:

1.

2.

3.

IBM Training

Review answers

3. You want to replace the default icon for the text/plain file type documents with a custom icon. Which of the following IBM Content Navigator features can you use to change the icon?
   A. MIME Type Mapping
   B. Custom plug-ins
   C. Icon Mapping
   D. Themes

   The answer is C.

Figure 3-34. Review answers

IBM Training

Unit summary

- Customize a desktop banner, login page, and theme
- Modify menus, icons, and labels
- Create a viewer map
- Register a plug-in

Customizing an IBM Content Navigator Desktop

Figure 3-35. Unit summary

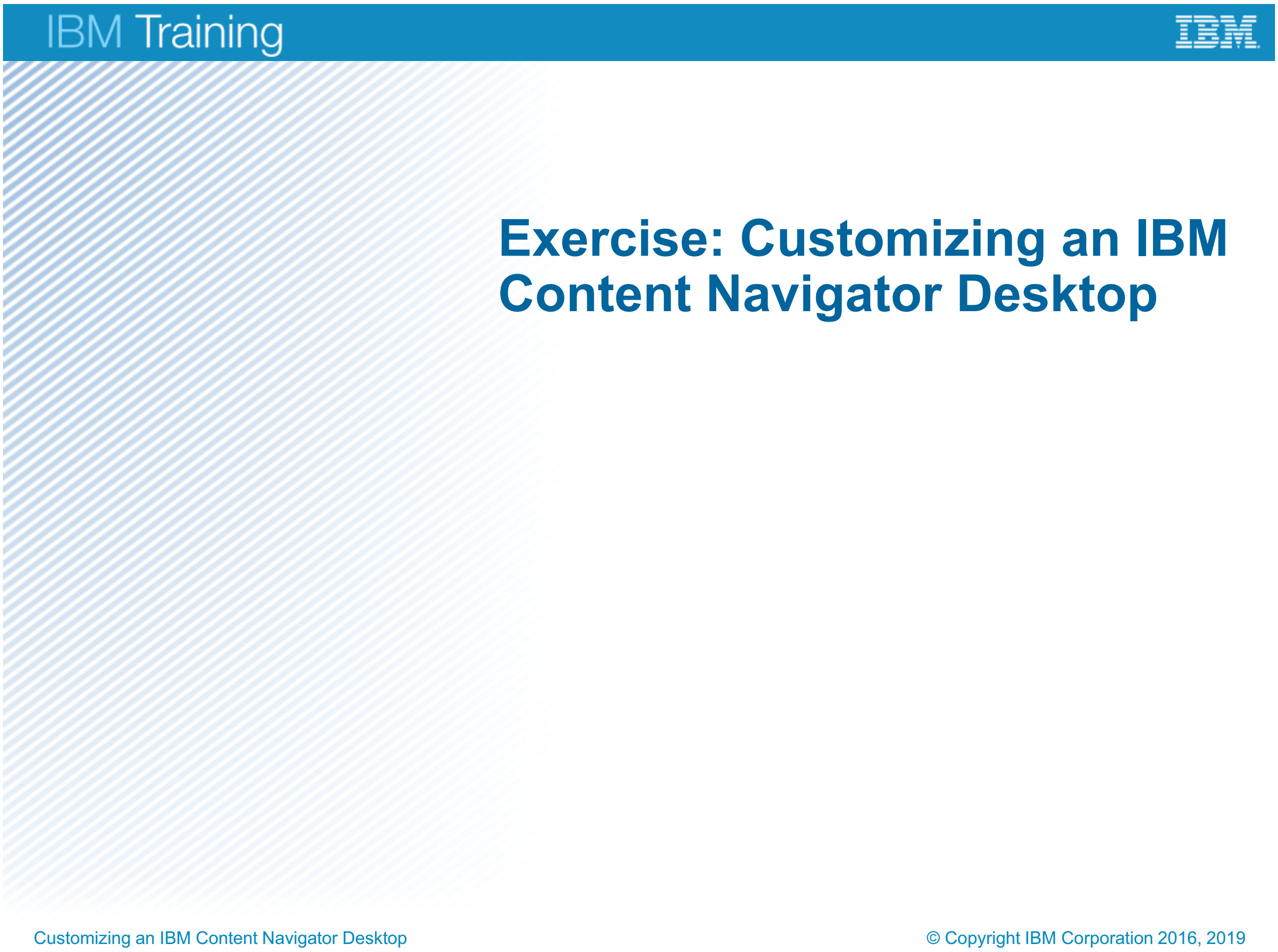


Figure 3-36. Exercise: Customizing an IBM Content Navigator Desktop

IBM Training

Exercise objectives

- Customize a desktop banner, login page, and theme
- Modify menus, icons, and labels
- Create a viewer map
- Register a plug-in

Customizing an IBM Content Navigator Desktop

Figure 3-37. Exercise objectives

Unit 4. Entry Templates

Estimated time

01:30

Overview

In this unit, you learn how to configure entry template management, and how to build and use entry templates.

How you will check your progress

- Review
- Exercise

References

https://www.ibm.com/support/knowledgecenter/SSEUEX_3.0.6/com.ibm.usingeuc.doc/euche013.htm

IBM Training

Unit objectives

- Describe the use of IBM Content Navigator entry templates
- Configure entry template management
- Build an entry template to add documents
- Associate entry templates with a folder
- Customize property layouts for entry templates

Entry Templates

Figure 4-1. Unit objectives

IBM Training

Topics

- Configure entry template management
- Build entry templates
- Customize property layouts

Entry Templates

Figure 4-2. Topics

4.1. Configure entry template management

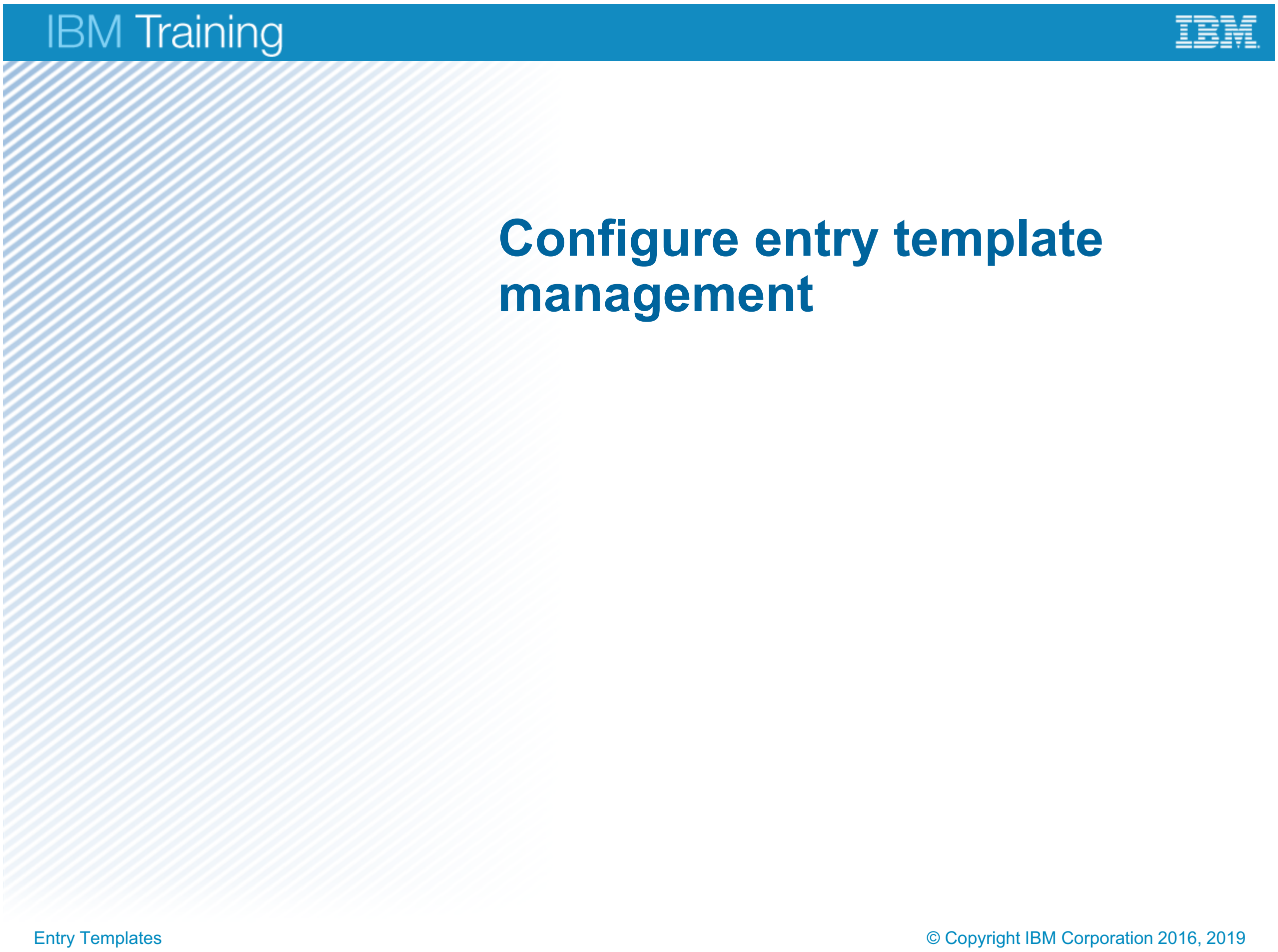


Figure 4-3. Configure entry template management

IBM Training

IBM Content Navigator entry templates

- With entry templates, you can:
  - Control how items are managed in the repository
  - Automate the process of adding content to a repository
  - Make it easy and quick for users to add documents or folders
  - Ensure that the content is classified accurately with the proper security
  - Trigger a workflow when a document or a folder is added
- Use entry templates to:
  - Add documents or folders
  - Check in documents
  - Edit the properties of items
  - Have a customized properties layout

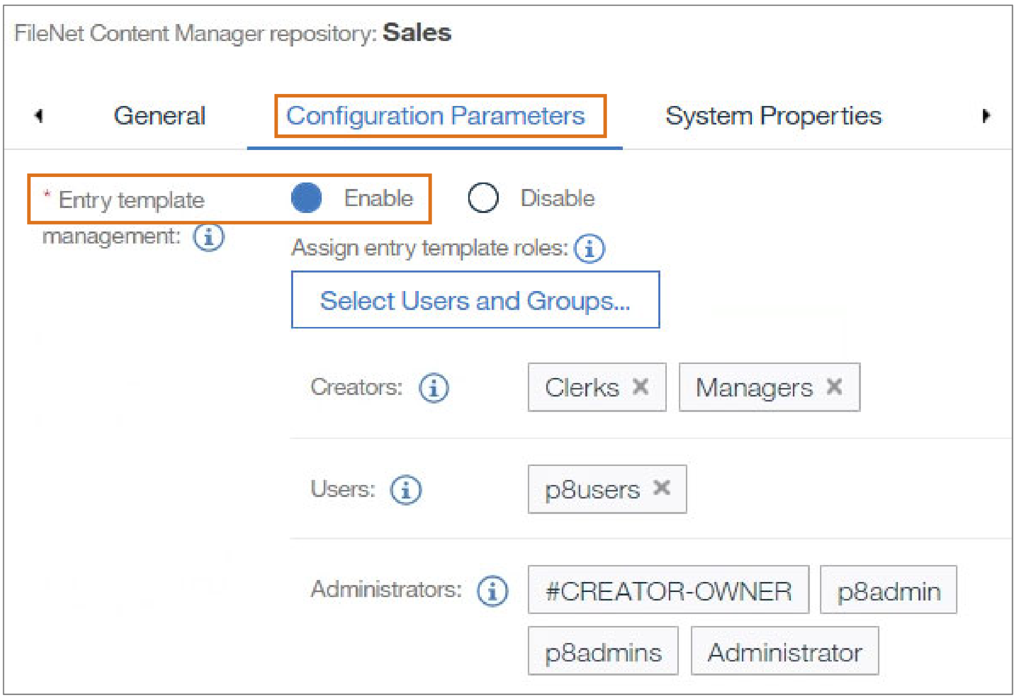
Entry Templates

Figure 4-4. IBM Content Navigator entry templates

With entry templates, you can control the location, class, property values, and security of items.

IBM Training

Configure entry templates for a repository



Entry Templates

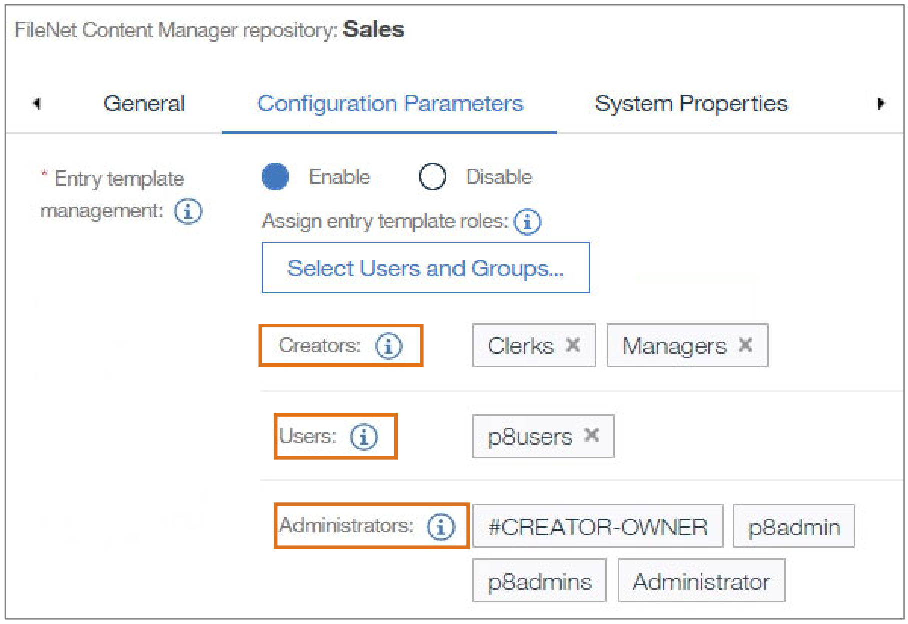
Figure 4-5. Configure entry templates for a repository

The screen capture shows the configuration page for a FileNet Content Manager repository. The Entry template management is enabled on the Configuration Parameters tab, under the Optional Features section.

IBM Training

Security settings for entry templates in repository

- Administrators
- Creators
- Users



Entry Templates

Figure 4-6. Security settings for entry templates in repository

The screen capture shows the security settings for the entry templates on FileNet Content Manager repositories. You specify the users and groups who can create, modify, and use entry templates.

- Specify groups rather than users to simplify entry template management.
- In the IBM Content Navigator administration tool, if you create multiple repositories that point to the same IBM FileNet P8 object store. The security that you set for one of these repositories is used by all of the repositories that point to that object store.

The IBM Content Navigator administration tool defines the following entry template roles:

a. Administrators

- Users who have Full Control permissions for the repository (object store).
- Administrators can delete or modify any entry template.
- You cannot change the list of entry template administrators from the IBM Content Navigator administration tool.
- The administrators' entries must be modified directly on the Entry Template class in the Administration Console for Content Platform Engine (ACCE) tool.

b. **Creators**

- Allowed to create entry templates.
- Granted View all properties, Create instance, and Read permissions.

c. **Users**

- Allowed to use entry templates. Granted View all properties and Read permissions.

You can change the list of entry template creators and users from the IBM Content Navigator administration tool.

To allow all of the users in your environment to use entry templates, you can add the #AUTHENTICATED-USERS pseudo-account to the entry template user role.

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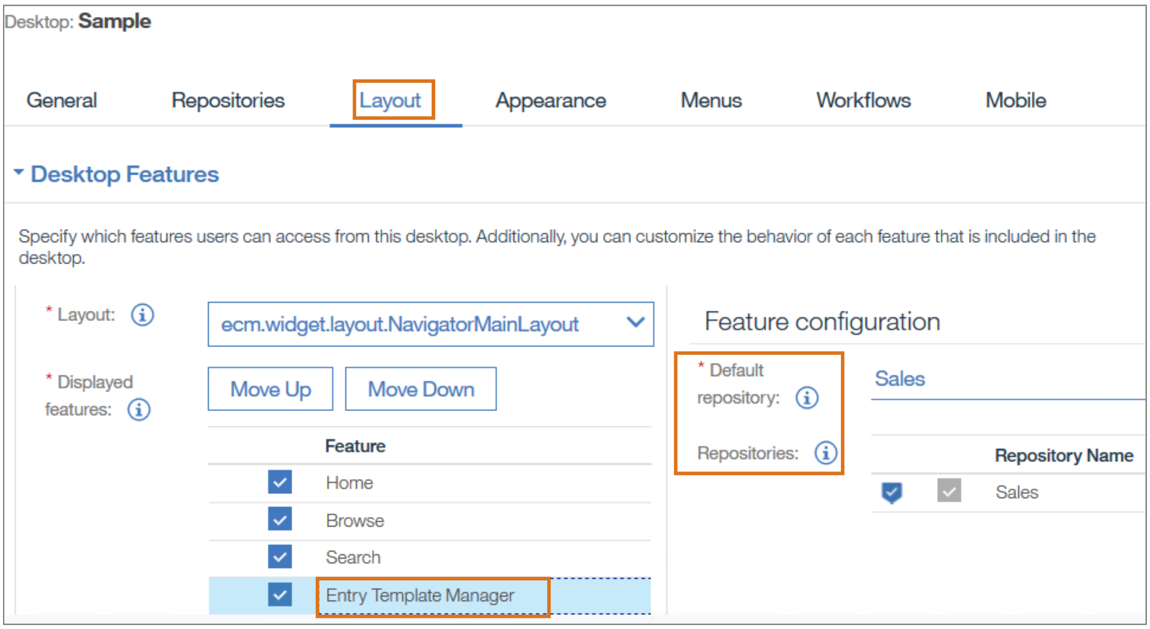
Entry Templates Manager feature for a desktop



Entry Templates

Figure 4-7. Entry Templates Manager feature for a desktop

The screen capture shows the IBM Content Navigator desktop configuration > Layout tab. The Entry Template Manager feature and a default repository are selected. The available repositories that are enabled for entry template management are listed.

4.2. Build entry templates

IBM Training

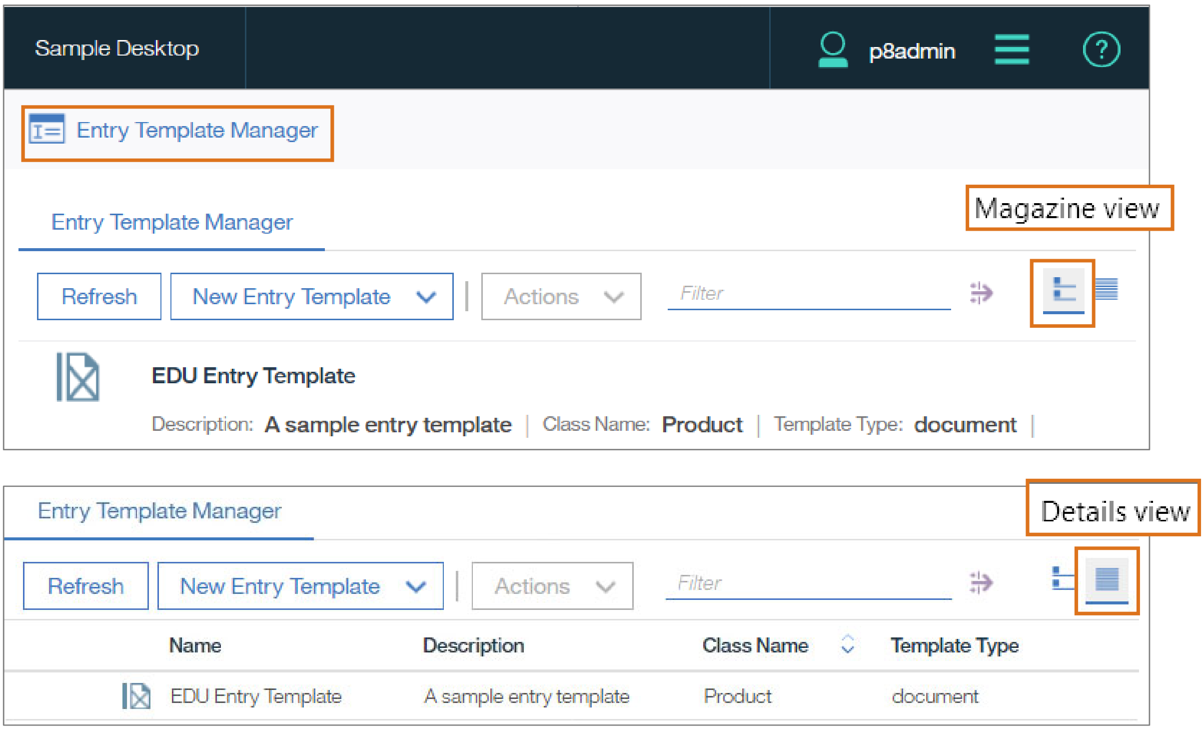
Build entry templates

Entry Templates

Figure 4-8. Build entry templates

IBM Training

Entry Templates Manager page



Entry Templates

Figure 4-9. Entry Templates Manager page

The screen capture shows the Entry Templates Manager page in a IBM Content Navigator desktop. Upper screen capture shows the entry templates in Magazine view and the lower one in Details view.

- In Details view, you can sort the entry templates list by any column.
- To find an entry template quickly, you can filter by any or all column values. You can filter with multiple terms by using all rules (AND) or any rule (OR).

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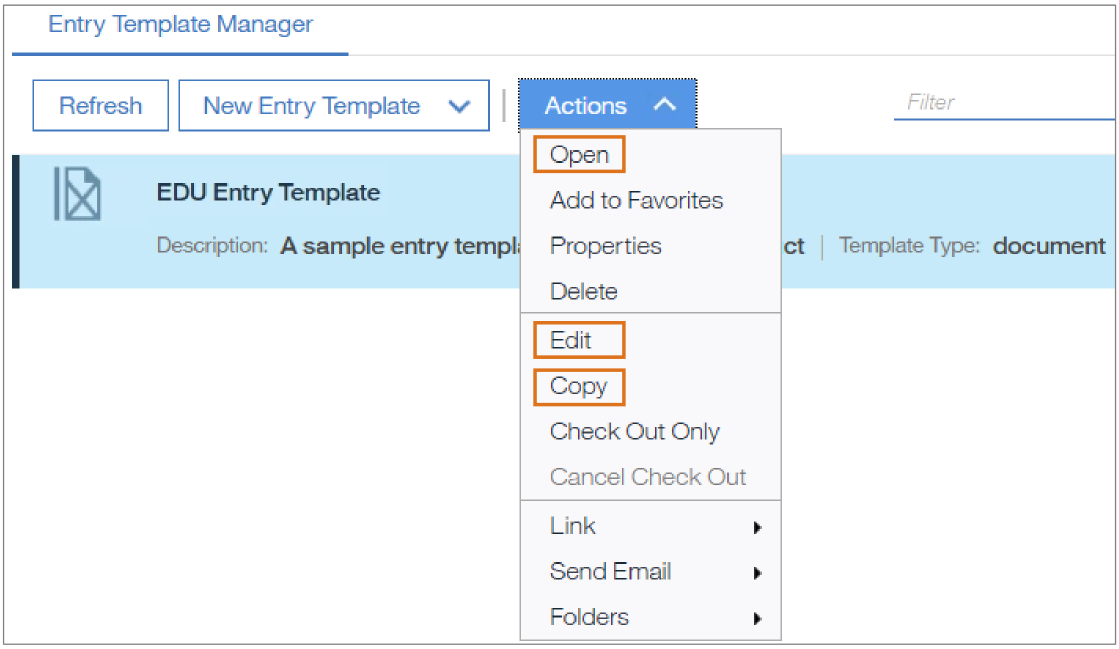
Entry Templates Manager - actions



Entry Templates

Figure 4-10. Entry Templates Manager - actions

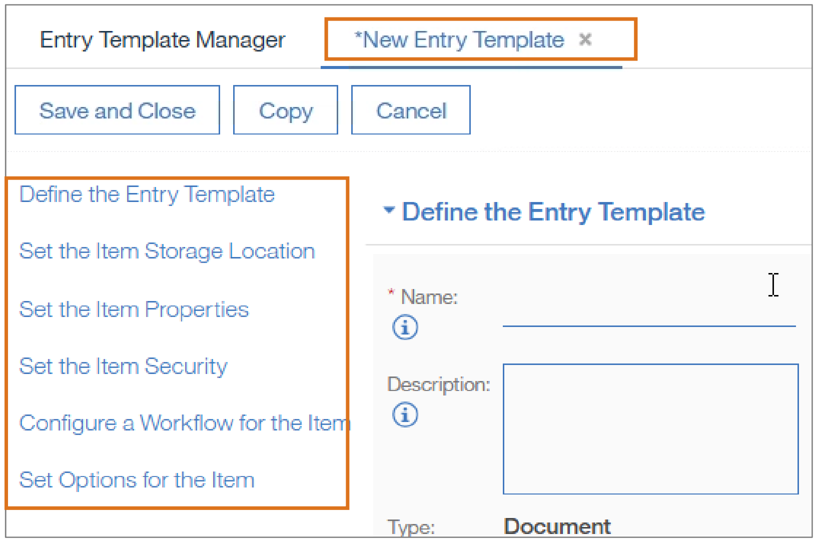
The screen capture shows the actions available for the entry templates.

- Standard document actions: Add to Favorites, Properties, Delete, Check Out Only, Cancel Check Out, Link, Send Email, and Folders
- Entry template-specific actions: Open, Edit, and Copy

IBM Training

High-level steps to create entry templates

- Define
- Set the Item Storage Location
- Set the Item Properties
- Set the Item security
- Configure a Workflow for the Item
- Set Options for the Item



Entry Templates

Figure 4-11. High-level steps to create entry templates

The screen capture shows the high-level steps for creating an entry template.

You can create document or folder entry templates. The steps are similar.

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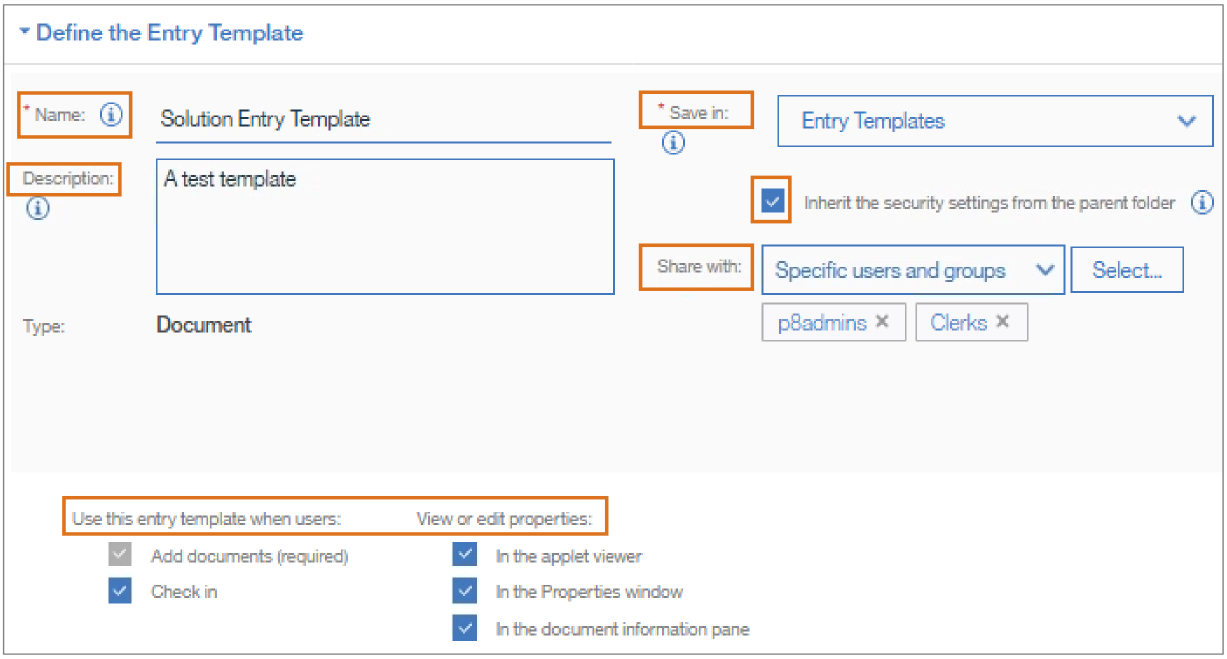
Define the Entry Template



Entry Templates

Figure 4-12. Define the Entry Template

The screen capture shows the Define the Entry Template step for creating an entry template.

The following fields are defined:

- Name and Description
- Save location: the repository, a folder, or a teamspace folder
- Inherit security settings from the parent (save in location) folder
- Assigned security: Only me, Everyone, or Specific users and groups
- Apply this entry template at check in
- Apply this entry template when you edit properties

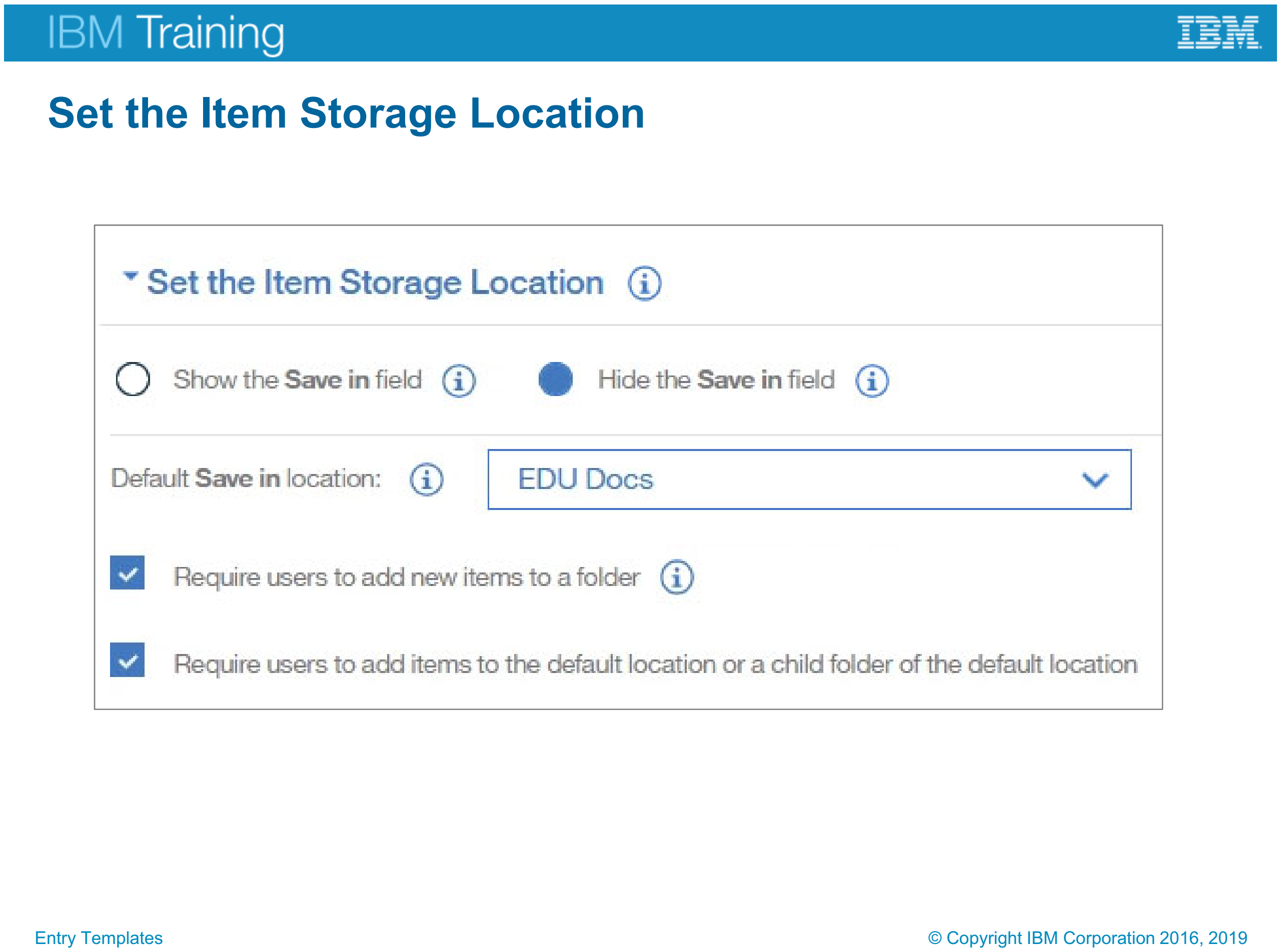


Figure 4-13. Set the Item Storage Location

The screen capture shows the Set the Item Storage Location step for creating an entry template. You define the location where the created documents are saved and select the following options:

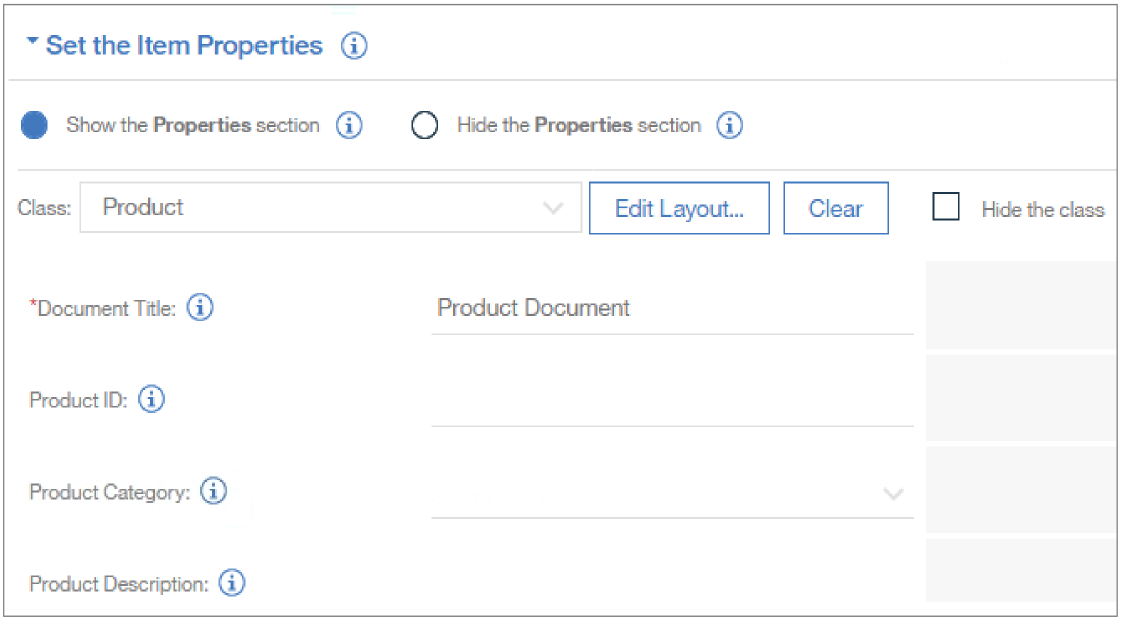
- Show or hide the Save in field
- Set the default Save in location
- Require users to add new items to a folder
- Require users to add items to the default location or a child folder of the default location

If you choose to hide the Save in field, users cannot select any other folder in which to save the document.

- If you don't select the Require users to add new items to a folder option, the documents added are unfiled.
- If you don't select the Require users to add items to the default location or a child folder of the default location option:
  - Users can browse to any folder to add the items.

IBM Training

Set the Item Properties



Entry Templates

Figure 4-14. Set the Item Properties

The screen capture shows the Set the Item Properties step for creating an entry template. You define how the document properties are handled and select the following options:

- Show or hide the Properties section
- Document class
- Hide the class
- Edit the property layout

Select the document class becomes read-only after you save the entry template.

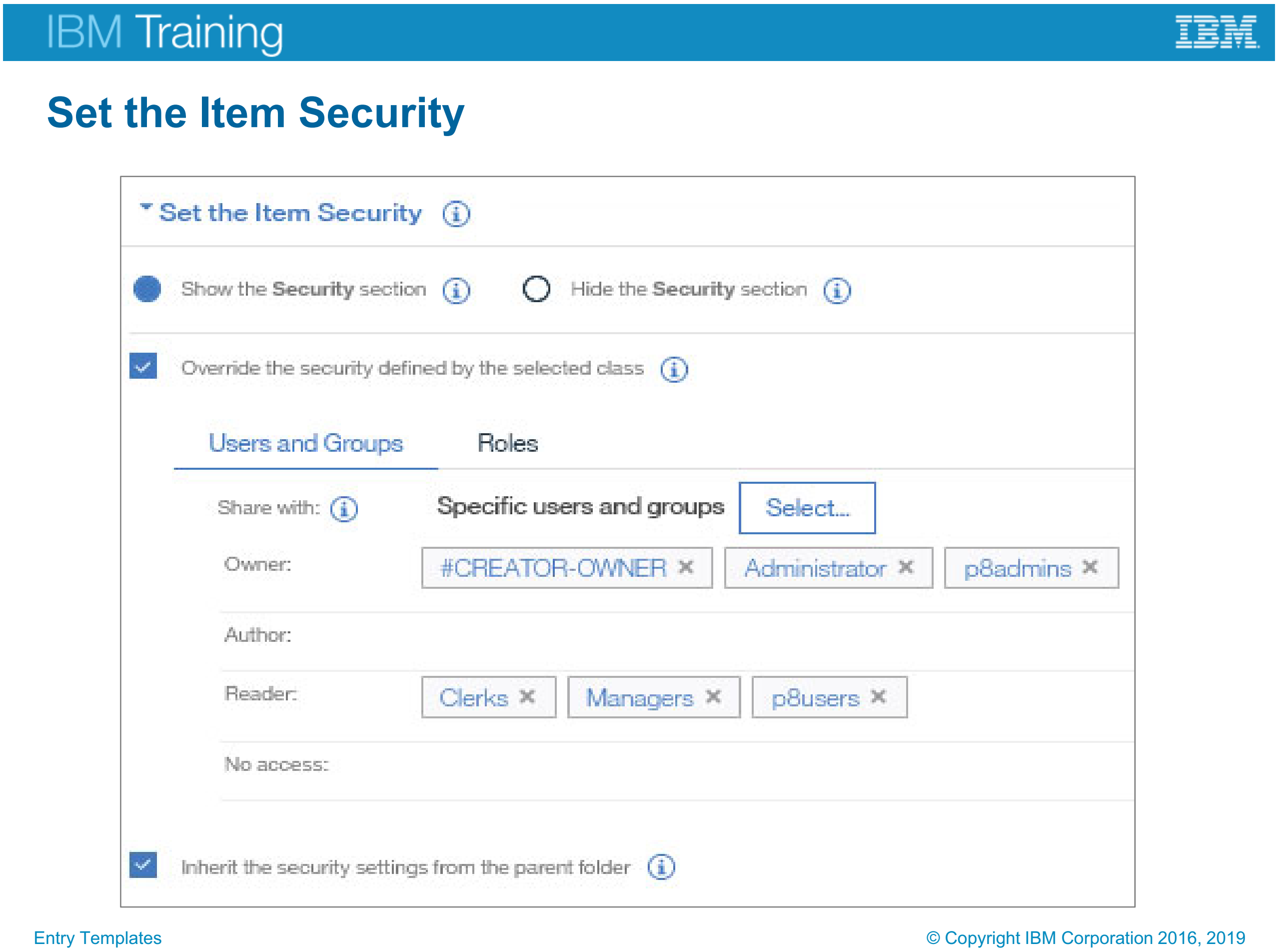


Figure 4-15. Set the Item Security

The screen capture shows the Set the Item Security step for creating an entry template. You define the security for the created documents and select the following options:

- Show or hide the Security section
- Override the default security defined by the selected class
- Inherit the security settings from the parent folder
- Apply Security policy

The workflow topic is discussed in detail in the IBM Case Foundation courses.

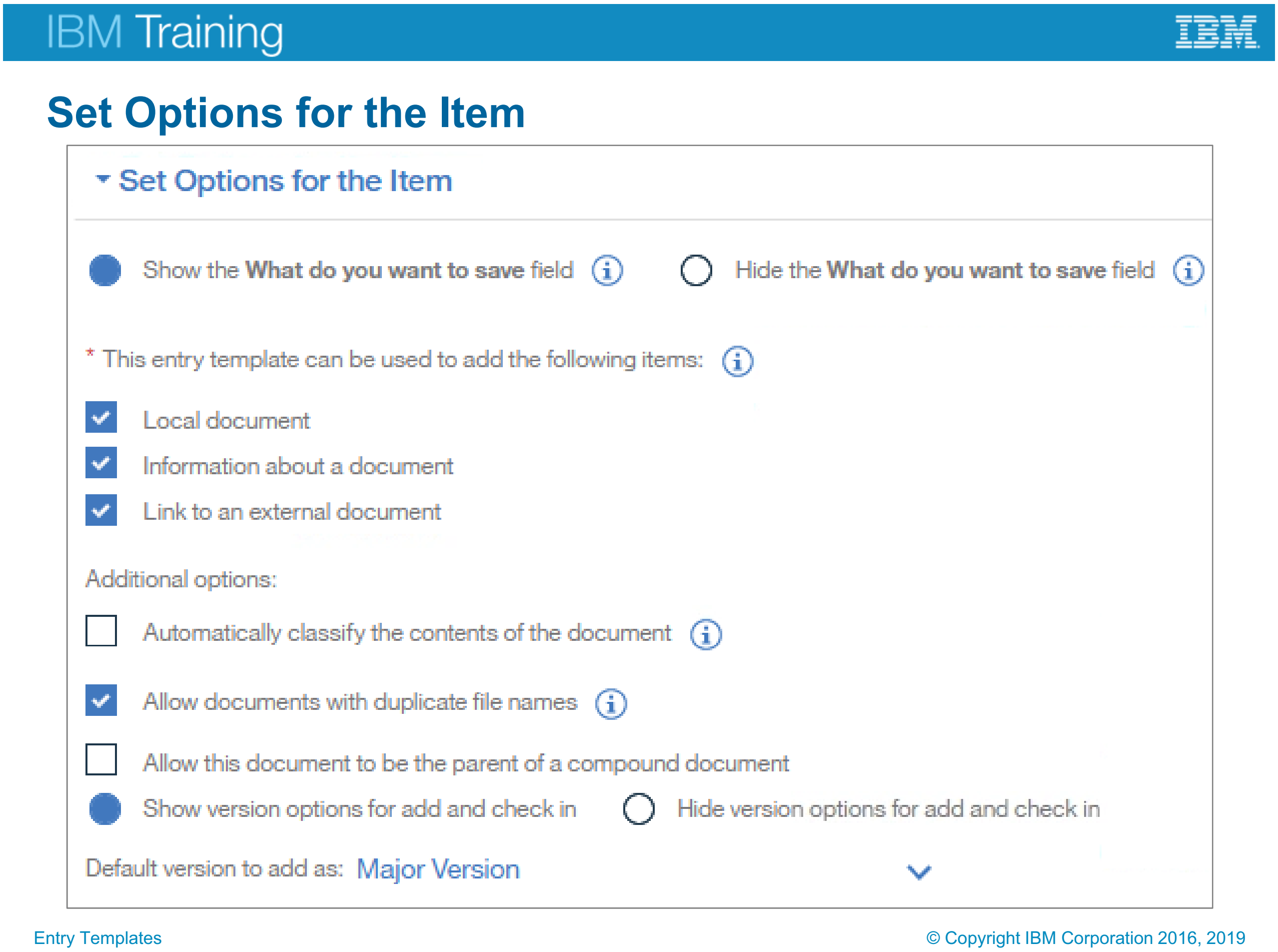


Figure 4-16. Set Options for the Item

The screen capture shows the Set Options for the Item step for creating an entry template. You set the following options for the document:

- Show or hide the What do you want to save? field
- For This Entry template can be used to add the following items, select the following allowed choices: Local document, Information about a document, and Link to an external document
- Additional options:
  - Automatically classify the contents of the document
  - Allow this document to be the parent of a compound document
  - Show or hide the (major and minor) version options for add and check in
  - Select whether, by default, the document should be added as a major or minor version

Considerations before you delete an entry template

If you delete an existing entry template, it has an impact on the documents or folders that are associated with this template.

The items are no longer associated with the template and users might get a warning when they update the item.The property layout that is defined by the entry template are no longer applicable.

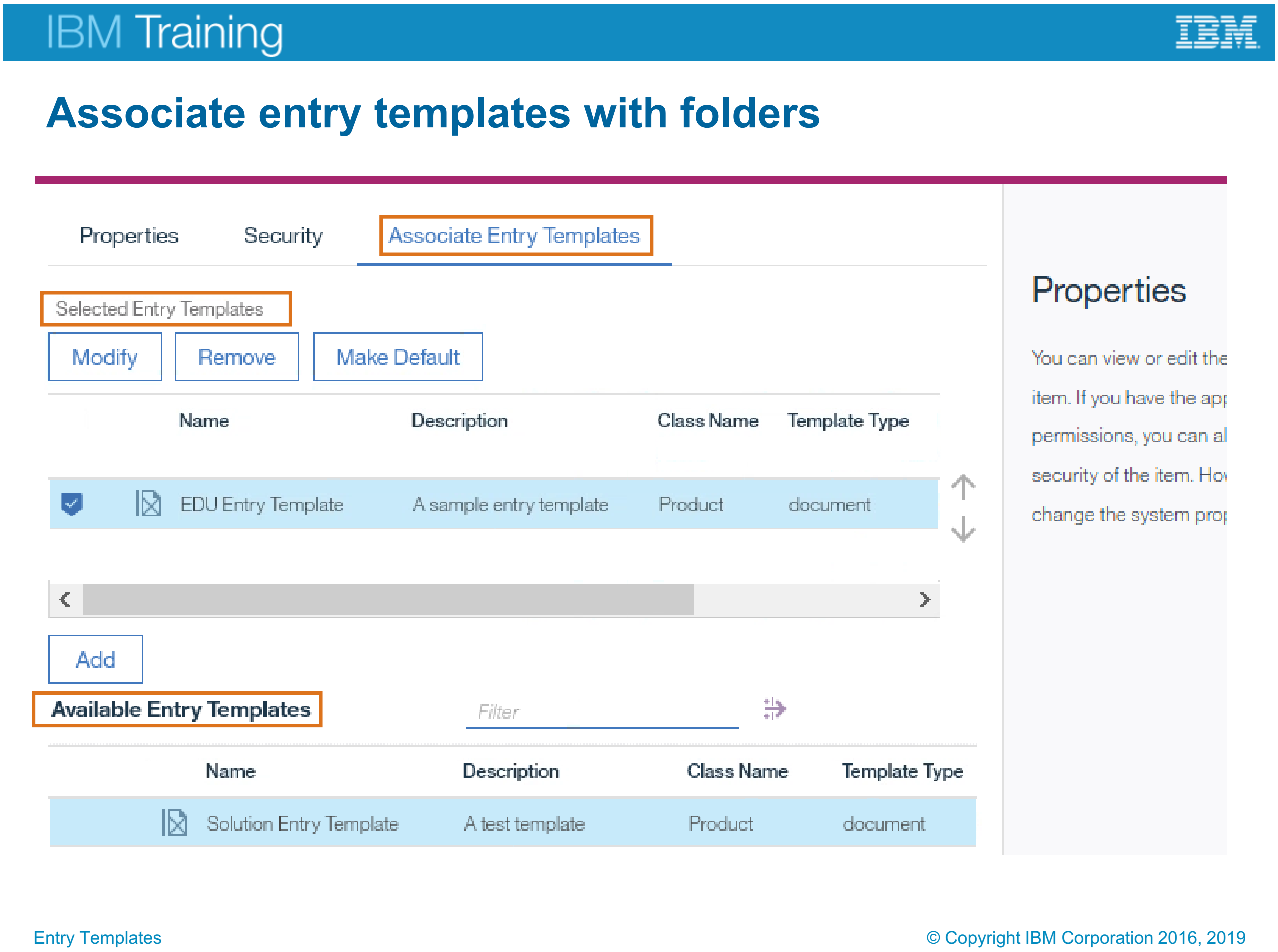


Figure 4-17. Associate entry templates with folders

The screen capture shows the Associate Entry Templates tab of the Properties page for a folder.

The Available Entry Templates section:

- Shows all entry templates that are available in the repository and that are not listed in the Selected Entry Templates section
- Supports the same filtering as the Entry Template Manager
- Has Add action to move the selected entry template from the Available to the Selected Entry Templates

The Selected Entry Templates section has:

- A list of entry templates that are associated with the folder
- The Modify action to change the folder association settings for document entry templates: (1) destination that is specified in the entry template for adding documents (2) allowed file types
- The Remove action to remove an entry template and add it back to the available list.
- The Make default action marks the entry template as the default and the status is indicated by the blue icon.

The entry template that is marked as default is automatically selected when you add a document to the folder.

- Controls to order of the entry templates list.

  When you add a document to the folder, the entry templates are listed in the order that you specify on the Folder Properties page.

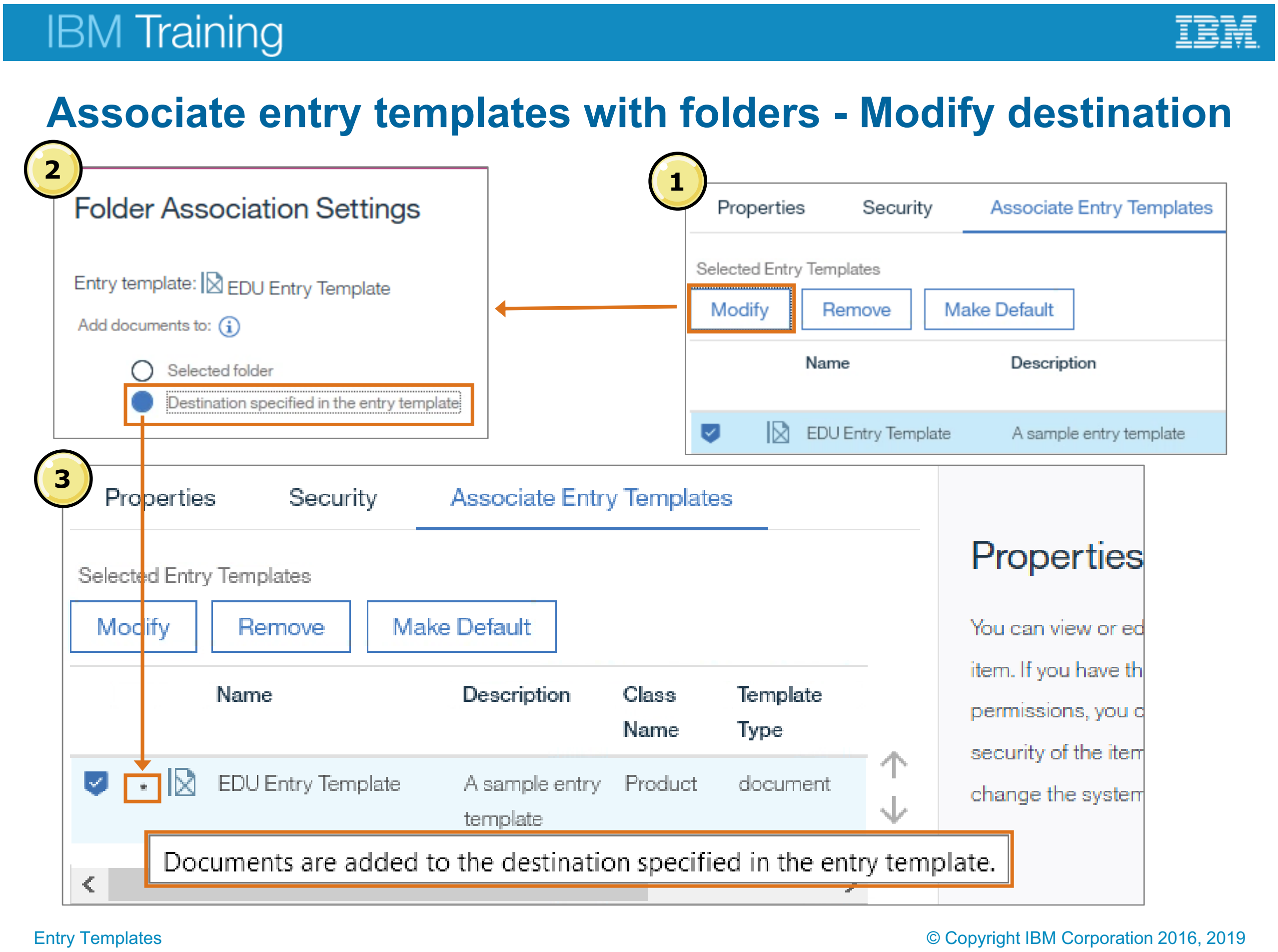


Figure 4-18. Associate entry templates with folders - Modify destination

The upper right screen capture shows the Modify action for the entry template that is associated with a folder. The upper left screen capture shows the Folder Association Settings dialog box and the bottom screen capture shows the option is Indicated by a dot icon on the Properties page.

1. Click Modify on the Associate Entry Templates tab of the Folder's Properties page.
2. It opens the Folder Association Settings dialog box. You have the following two options for the destination folder to add the documents:
   - Selected folder (The associated folder as the destination)
   - Destination specified in the entry template
3. If you select the Destination specified in the entry template option, it is indicated by a dot icon in the Selected Entry Templates section.

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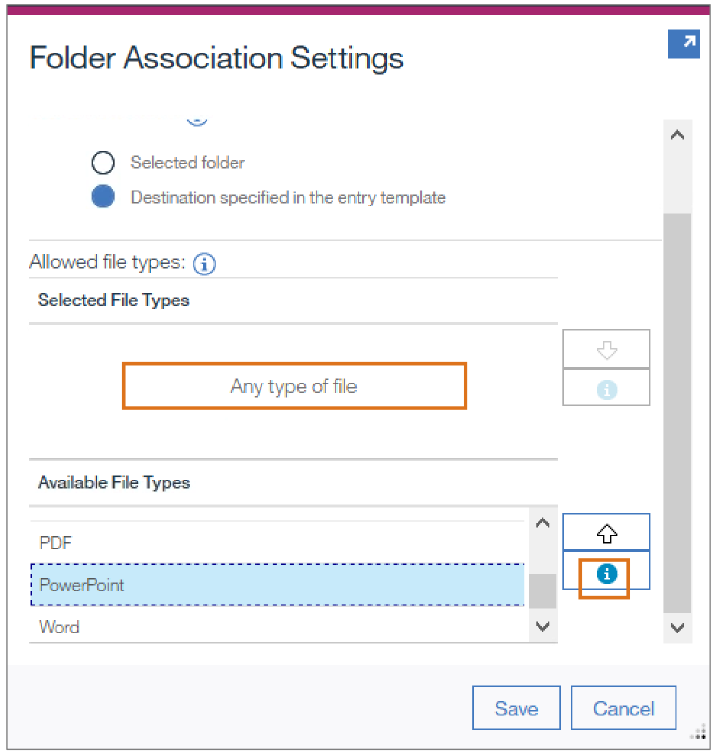
Associate entry templates with folders - Modify file types

- Selected file types
  - Allows the entry template to be available only for the selected file types
- No selection
  - Allows the entry template to be available to add all types of documents
- File types are defined in the admin tool > Settings.



Entry Templates

Figure 4-19. Associate entry templates with folders - Modify file types

The screen capture shows the Folder Association Settings dialog box > file type options.

1. Click Modify on the Associate Entry Templates tab of the Folder's Properties page.
2. It opens the Folder Association Settings dialog box. By default, you can use a document entry template for any supported file types. In the settings page, you can limit the allowed file types for the documents that are added with this entry template.
3. Click the Information icon to show the MIME types for a file type.

Notes:

- If you select file types, it restricts this entry template to be available only when you add documents that match one of the selected file types (MIME types).
- Documents that do not match the file type (MIME types) specified in any of the associated entry templates for this folder cannot be added.
- If you don't select any file types, this entry template is available to add all supported file types of documents.

4.3. Customize property layouts

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Customize property layouts

Entry Templates

Figure 4-20. Customize property layouts

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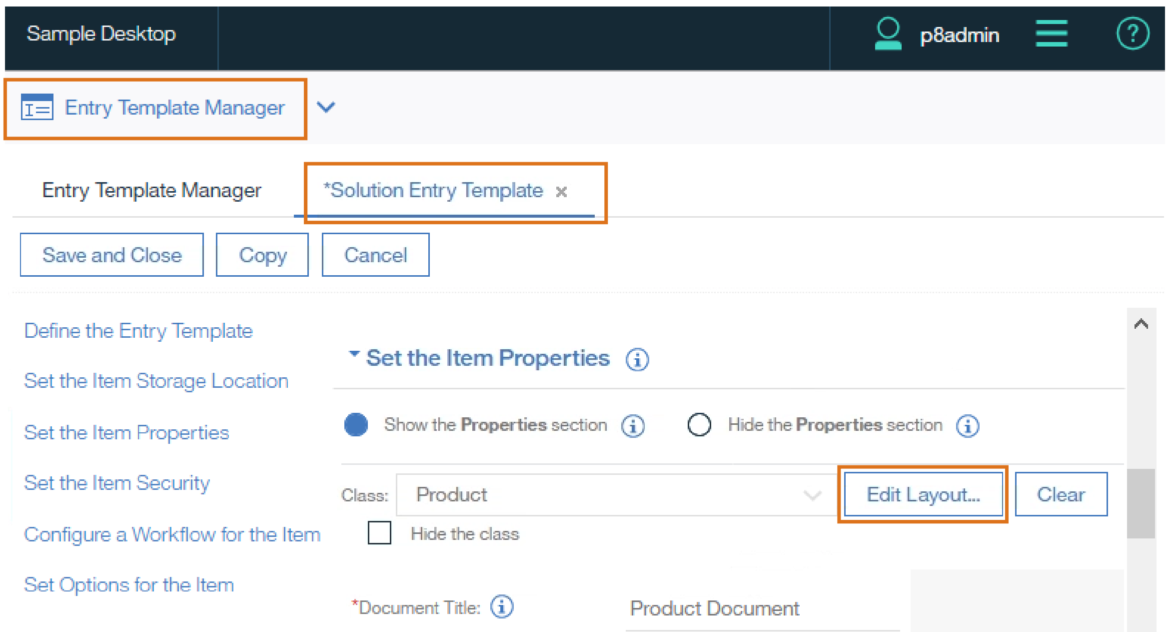
Entry templates - Edit Layout

- You can customize the property layouts for your entry templates.



Entry Templates

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Figure 4-21. Entry templates - Edit Layout

The screen capture shows an entry template that is opened for editing in IBM Content Navigator Entry Templates Manager. The Edit Layout action is highlighted.

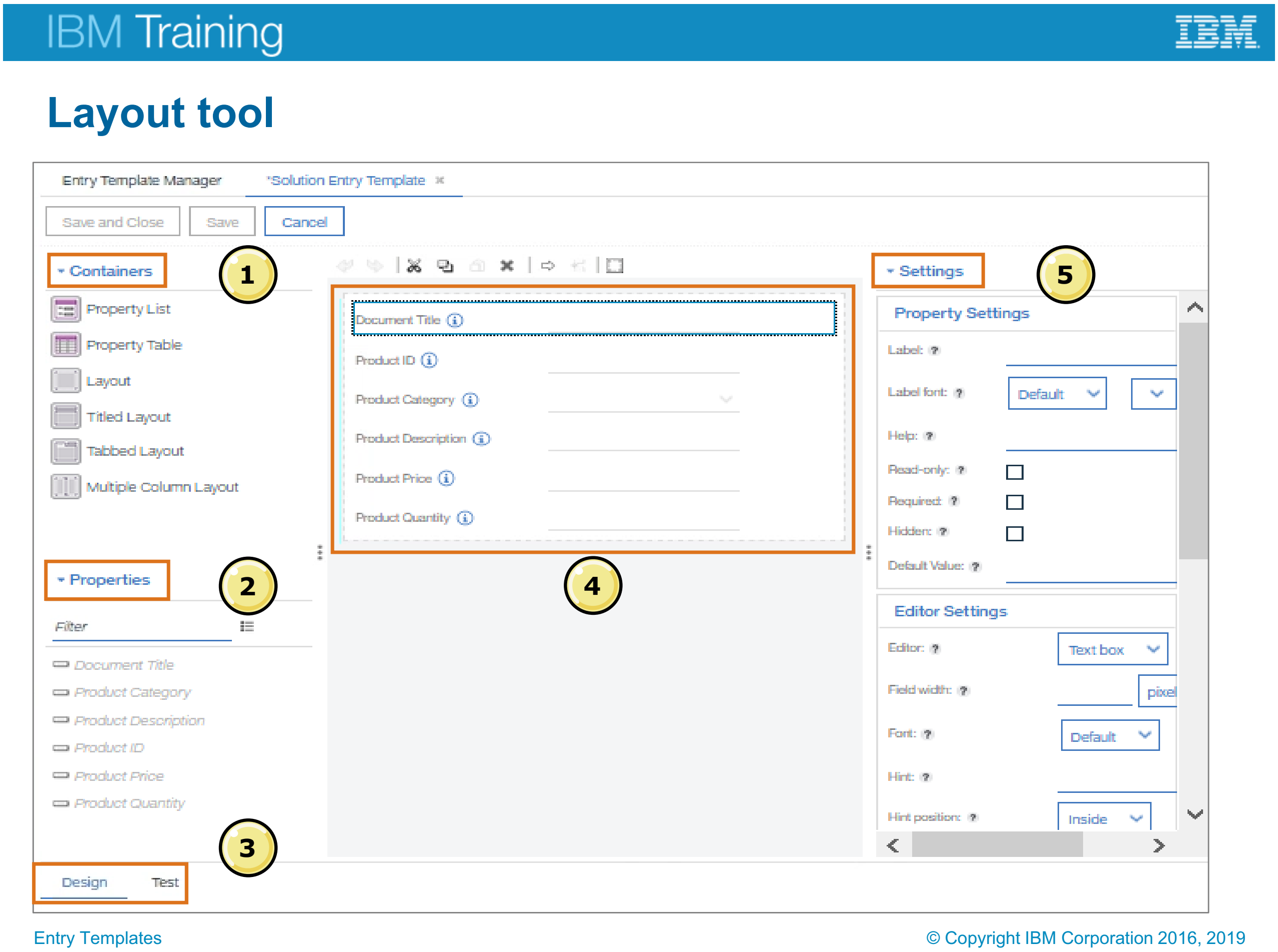

Figure 4-22. Layout tool

The screen capture shows the property layout tool in IBM Content Navigator.

The Layout tool has five main sections.

1. Upper left pane has a list of Containers.

   You can design the layouts with the containers.

2. Middle left pane (below the Containers) has a list of Properties for the selected document class.
3. Lower-left pane contains the Design and Test tabs.

   Design is the default tab. You use the Test pane to preview your design.

4. The middle pane is property layout canvas.

   The canvas is the visual layout tool where you can drag the containers to add to the layout, add or remove properties, and to move objects on the canvas.

   By default, all document class properties are shown on the canvas.

5. The upper right is the Settings pane.

   In the Settings pane, you edit each property that is selected on the canvas.

   Example: format a property, make it required, set length, set a default value

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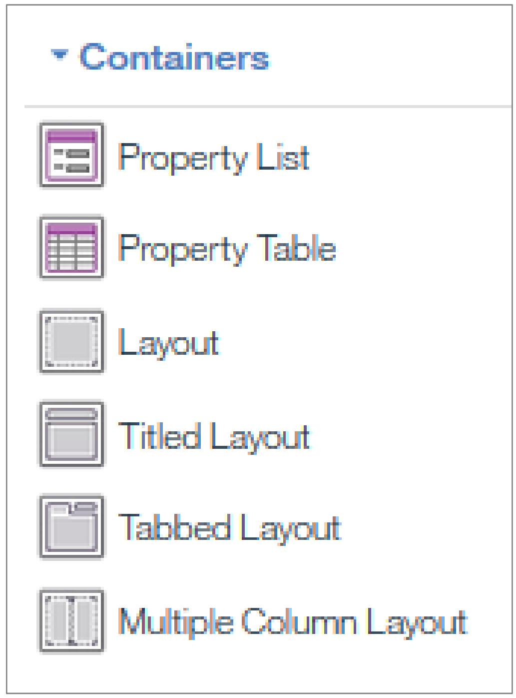
Containers

- Use Containers to group properties for rendering
- Containers can contain other containers
- Layout is used in default rendering.



Entry Templates

Figure 4-23. Containers

The screen capture shows a list of container types that are available for entry template property layout.

Following is a list of container types

- Property List: Displays properties in a grid format
- Property Table: Displays multivalue properties in a table
- Layout: Displays content horizontally or vertically
- Titled layout: A container with a title bar that’s collapsible. The title text is entered in the container settings
- Tabbed Layout: Displays content in a set of tabbed panes. The tab labels are entered in the container settings
- Multiple Column Layout: Displays content in a set of columns

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Container Settings

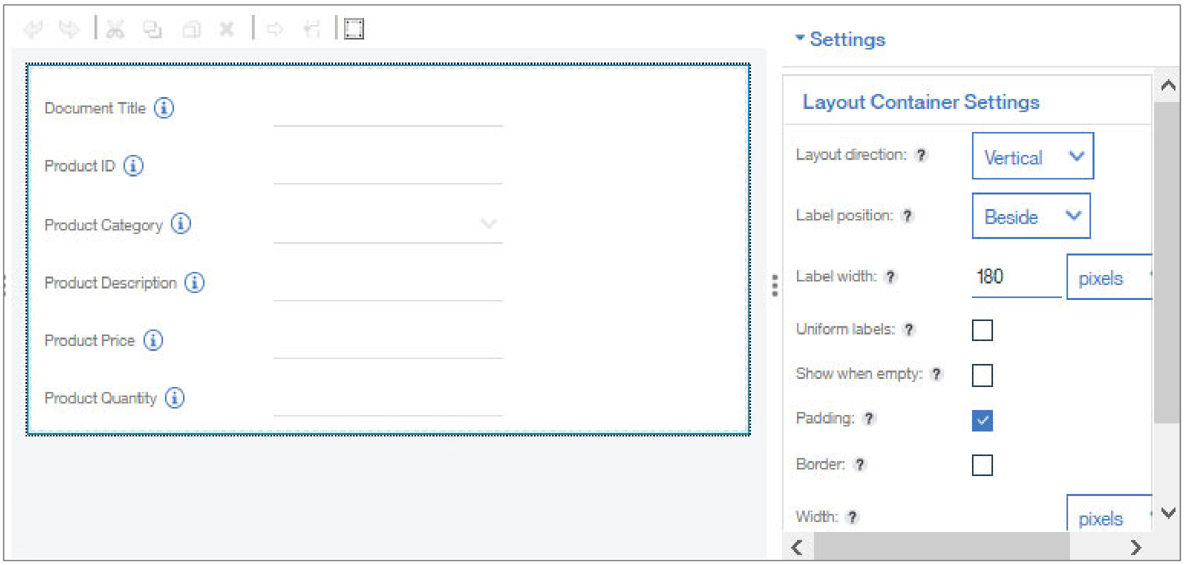

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Figure 4-24. Container Settings

The screen capture shows the Container Settings page.

- Each container type has specific settings that control how it is rendered.
- Select the border of the container in the canvas area to see the Layout Container Settings pane on the right.

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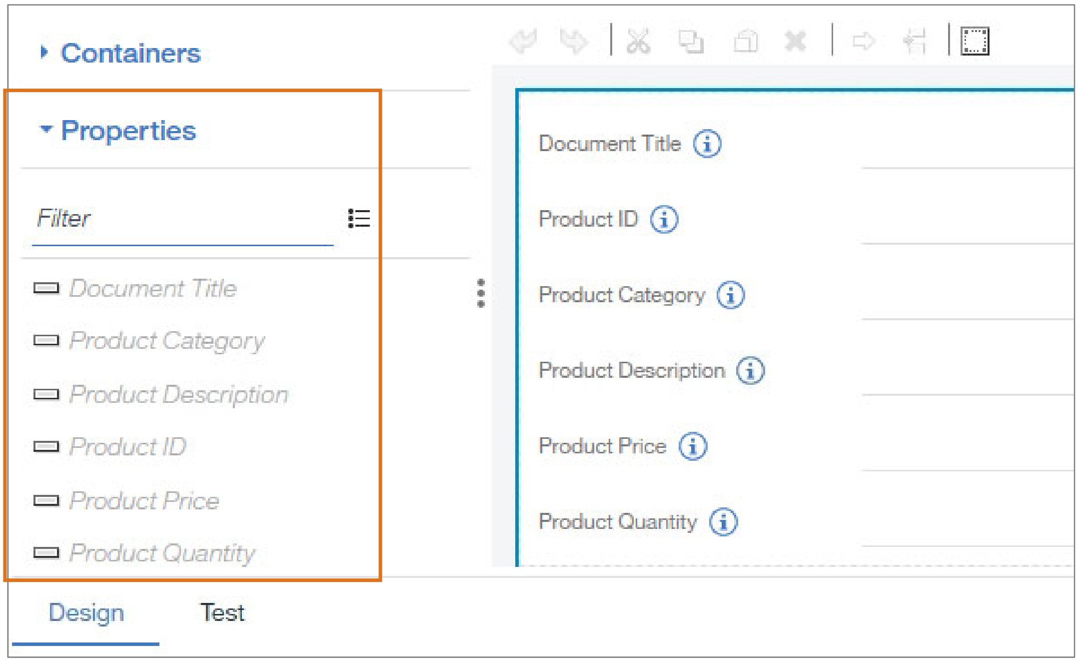
Properties Palette

- Palette contains a list of properties that are available for the document class.



Entry Templates

Figure 4-25. Properties Palette

The screen capture shows the Properties Palette section in the layout tool.

- Initial layout contains all the document class properties on the canvas.
- You can add properties to the layout more than once.

  For instance, if there a lot of properties and want to use a tab layout, might add to more than one layout as easy reference information. For example, you might want to use customer name on each tab.

  - Use in Tabbed or Titled layouts
  - If a property value is added more than once, the value assigned to the property is synced between the property controls
- If you remove a property from the canvas, that property is hidden from the user.

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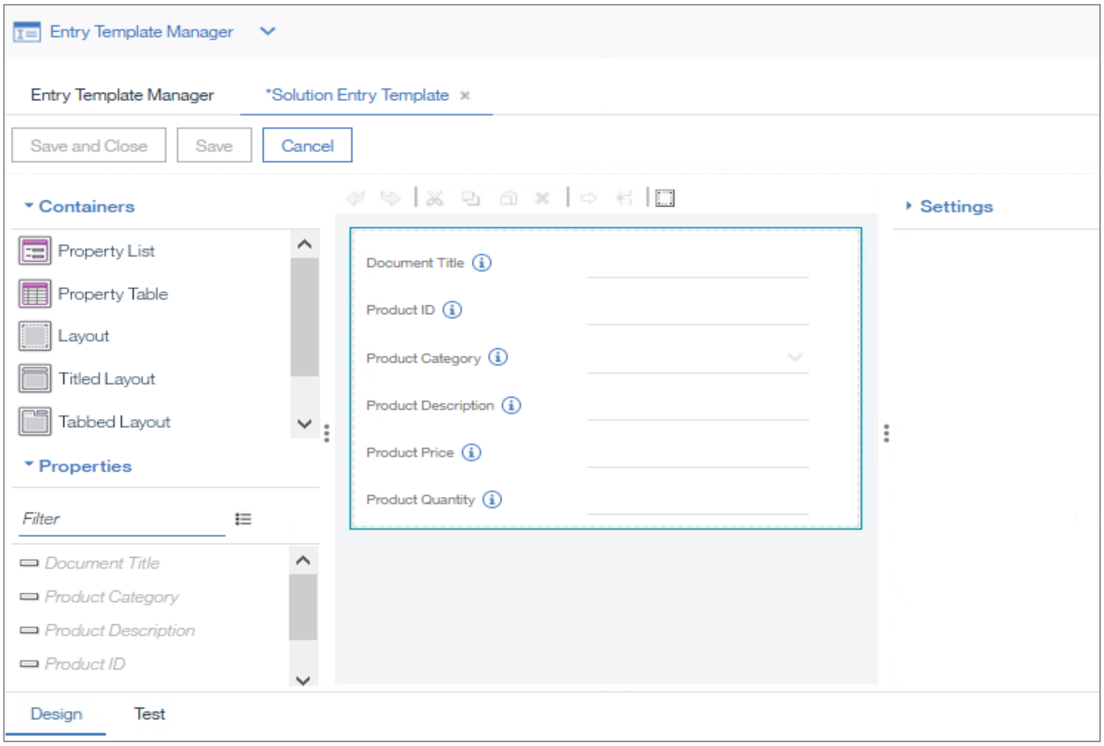
Default property layout



Entry Templates

Figure 4-26. Default property layout

The screen capture shows the default property layout which:

- Has the Layout container
- Lists the properties in class
- Uses initial property settings from the class
- Shows the default values from the class (if assigned)
- Positions a label beside the input field
- Initializes the label width to 180 px
- Shows all custom class properties even if they are defined as hidden in FileNet Content Manager

The default property layout does not support the IBM FileNet Content Manager object value properties or the IBM Content Manager reference attributes.

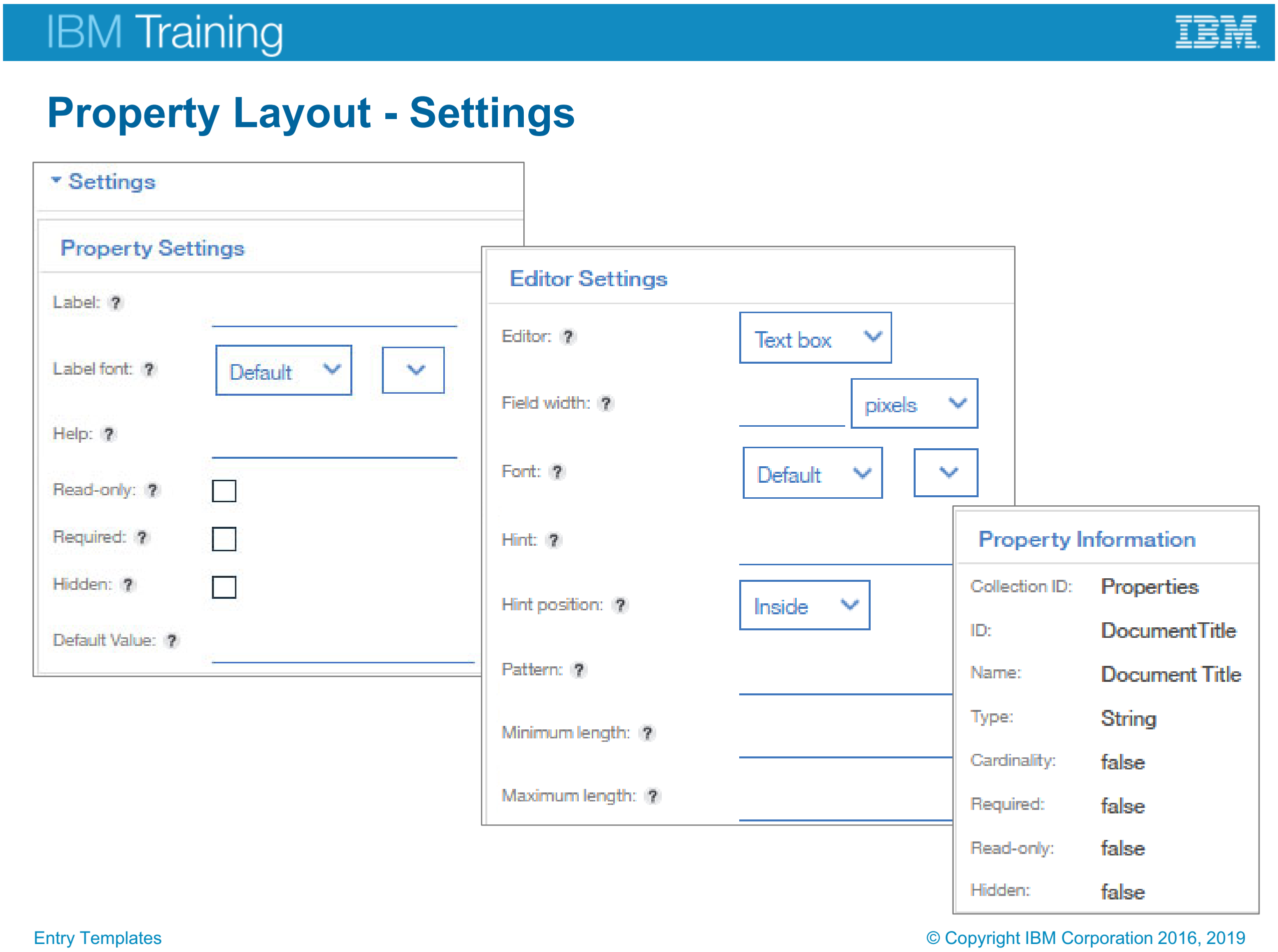


Figure 4-27. Property Layout - Settings

The screen captures show the three sections in the property layout settings for each property: Property Settings, Editor Settings, and Property Information.

Select individual properties in the middle pane to show the settings for that property in the rightmost pane.

Property Settings

The section contains general metadata from the class attributes

- Example: Label for the property, Help text, Read-only, Required, Hidden, Default Value

Editor Settings

- View display settings for value input field (Example: Text box or text area, field width, hint text in the text box)
- Value editors show on drop-down editors for multivalue properties

Property Information

- Initial static property information from class attributes

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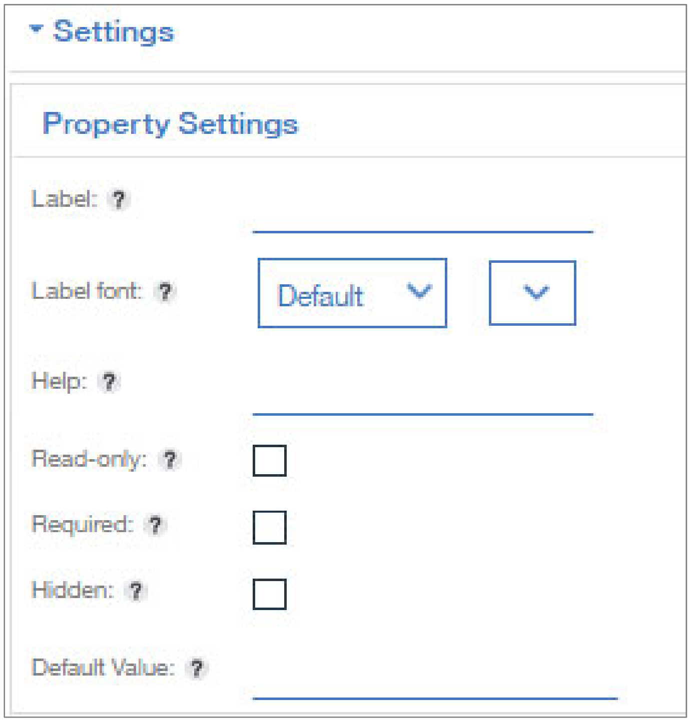
Property Settings



Entry Templates

Figure 4-28. Property Settings

The screen capture shows the Property Settings.

- Read-only: prevents users from editing the property value
- Required: Indicate that a value is must be provided
- Hidden: Hides the property information from the user
- Default Value: Provides a default value for the property that can be altered by the user
- Label: New label for property field
  - Label is shown only in places where the entry template layout is used
  - Label is not used in Browse or Search criteria or column display
- Help: Text the user sees when they click the help icon
  - If you do not enter any text, users see the IBM Content Navigator default help text.

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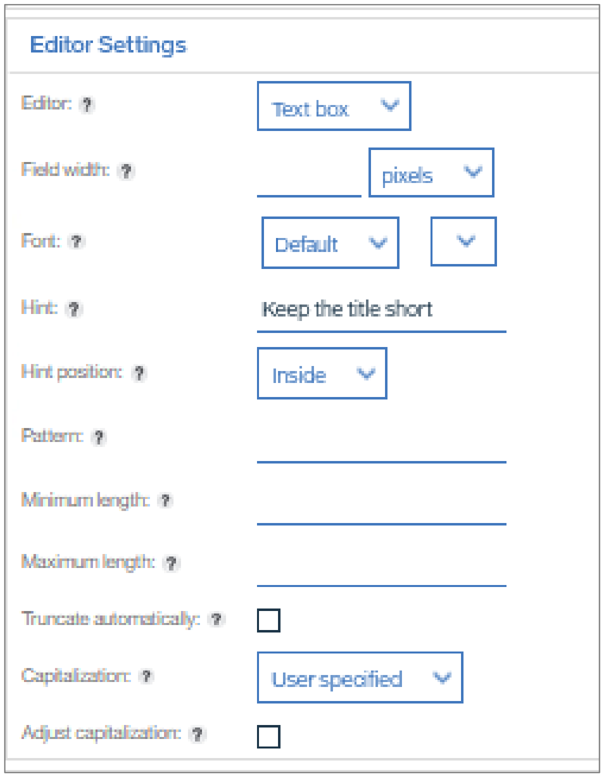
Editor Settings



Entry Templates

Figure 4-29. Editor Settings

The screen capture shows the Editor settings.

Value editor settings are saved in the designer view.

- Settings are not saved in the class attributes.
- Specify rendering behavior for the value input control. The list is not exhaustive. It depends on the property data type.
  - Editor: Select different input controls (depending on data type)
  - Field width: Control field width in pixels or percent
  - Hint: Help for users to enter data into the control
  - Hint position: Display location (inside or outside the control)
  - Pattern: A regular expression to validate the input for the field
  - Minimum length: Minimum number of characters that can be entered
  - Maximum length: Maximum number of characters that can be entered
  - Truncate automatically: Select whether user input is truncated to the maximum length automatically
  - Capitalization: The style of capitalization that is required for the text

- Adjust capitalization: Whether user input is automatically converted to the required capitalization

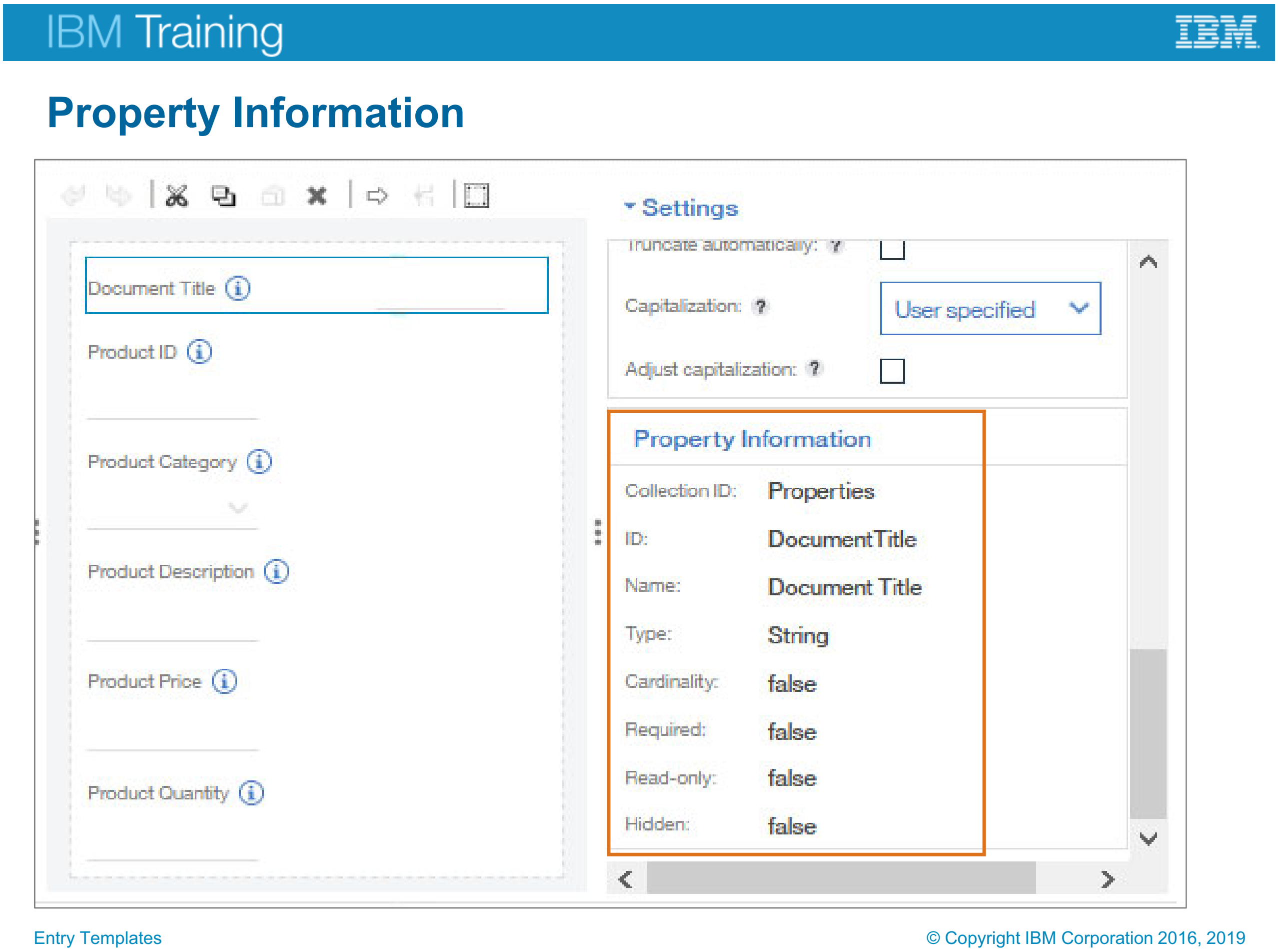


Figure 4-30. Property Information

The screen capture shows the Property Information that is basic metadata from original document class (not modified by entry template). It is static attribute information from the class properties.

- Collection ID: Used when you process multiple property collections; in IBM Content Navigator, there is only one collection called Properties.
- ID: Symbolic name of the property from the repository
- Name: Display name of the property
- Type: Value data type
- Cardinality: Single (false) or multiple values (true)
- Required: A value is required at run time
- Read-only: The value is displayed as read-only
- Hidden: The property is hidden at run time

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Custom property layout at run time

Custom layouts are shown at run time when an entry template is used to add content.

- Add Document page
- Check In page
- Properties page
- Document information pane
- Property pane in the Daeja ViewOne Virtual viewer

Figure 4-31. Custom property layout at run time

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Unit summary

- Describe the use of IBM Content Navigator entry templates
- Configure entry template management
- Build an entry template to add documents
- Associate entry templates with a folder
- Customize property layouts for entry templates

Entry Templates

Figure 4-32. Unit summary

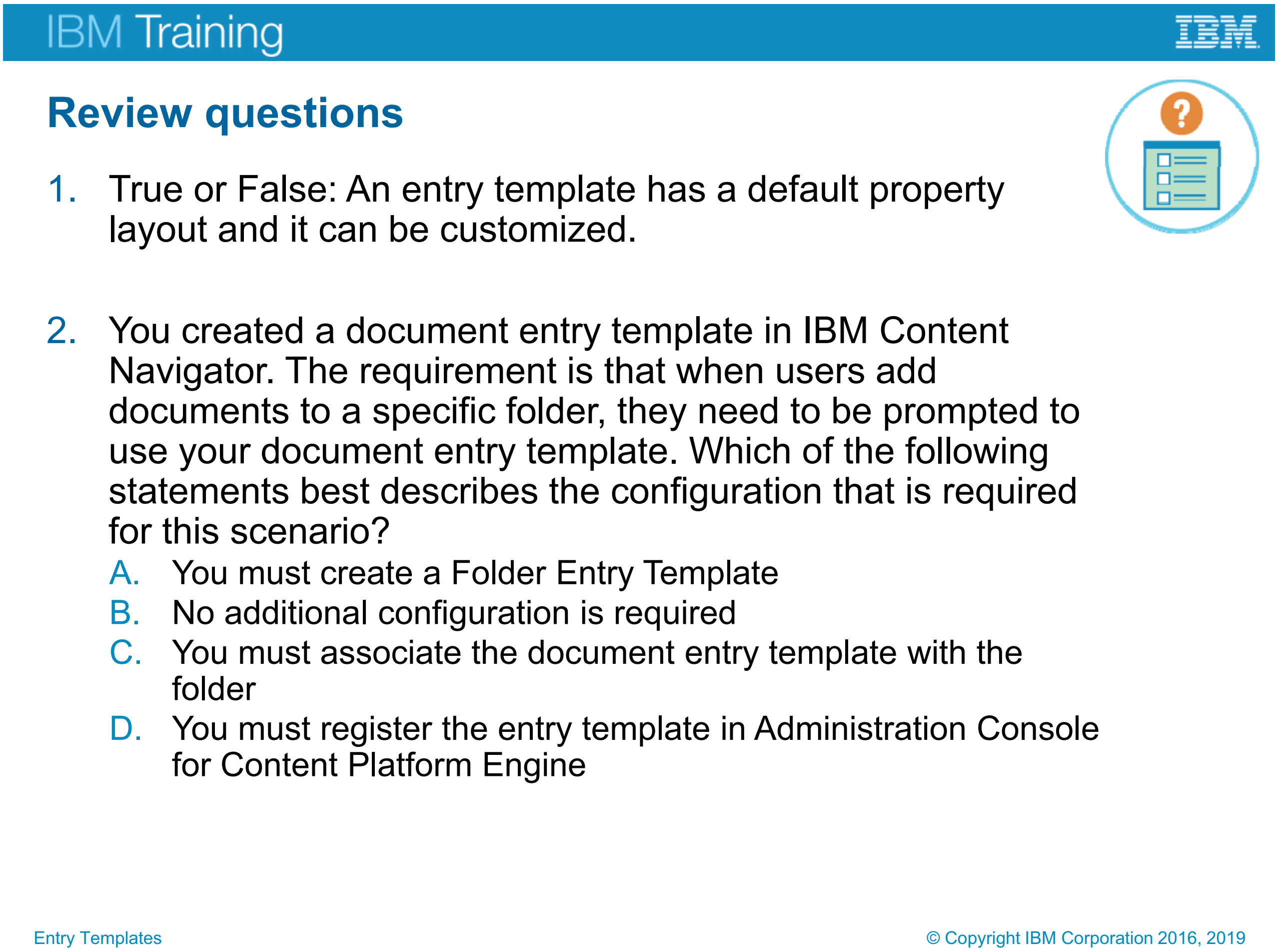

Figure 4-33. Review questions

Write your answers here:

1.

2.

3.

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Review answers

1. True or False: An entry template has a default property layout and it can be customized.
   The answer is True.

2. You created a document entry template in IBM Content Navigator. The requirement is that when users add documents to a specific folder, they need to be prompted to use your document entry template. Which of the following statements best describes the configuration that is required for this scenario?
   A. You must create a Folder Entry Template
   B. No additional configuration is required
   C. You must associate the document entry template with the folder
   D. You must register the entry template in Administration Console for Content Platform Engine

   The answer is C.

Entry Templates

Figure 4-34. Review answers

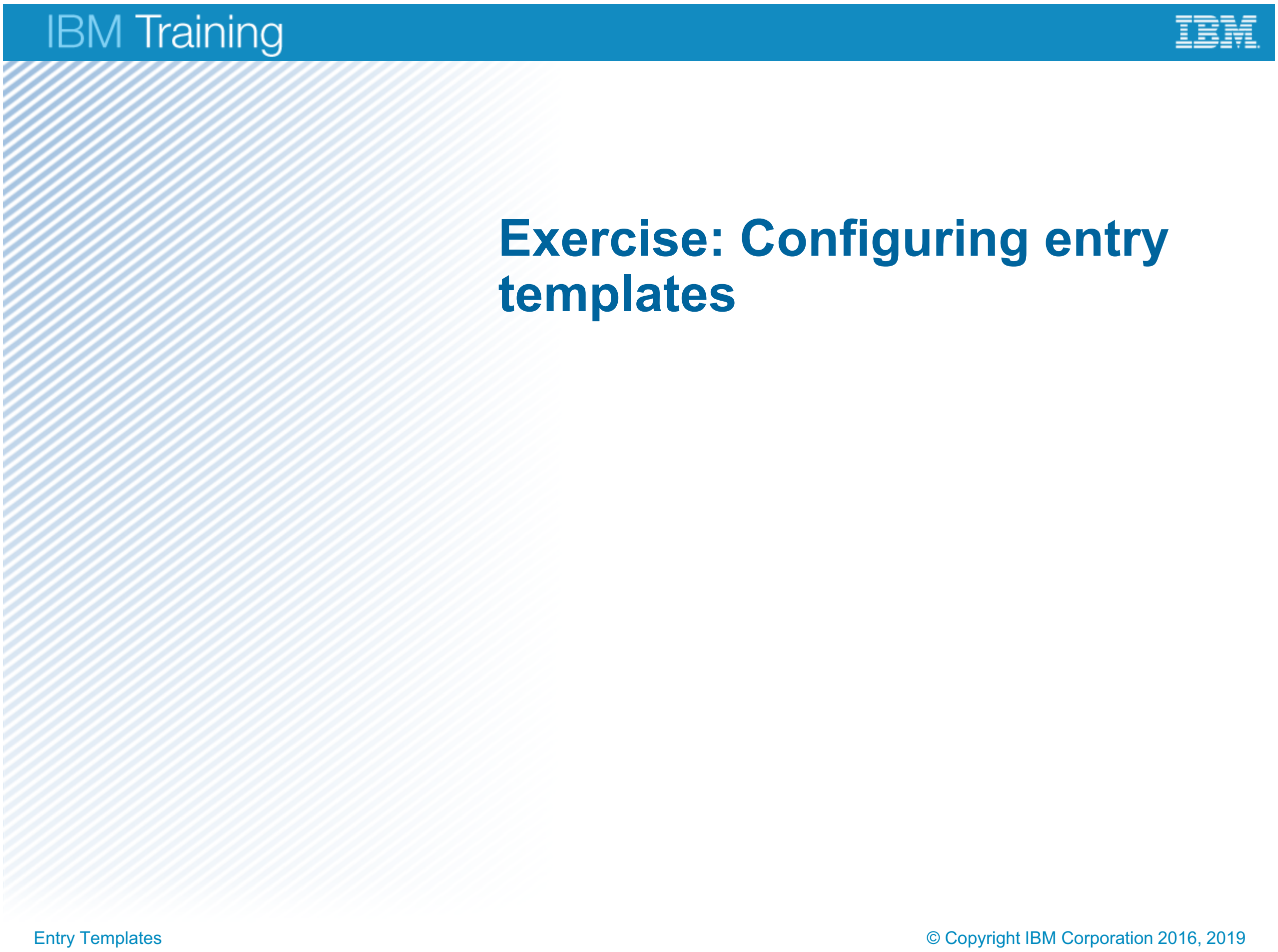

Figure 4-35. Exercise: Configuring entry templates

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Exercise objectives

- Configure entry template management
- Build an entry template to add documents
- Associate entry templates with a folder
- Customize property layouts for entry templates

Entry Templates

Figure 4-36. Exercise objectives

Unit 5. Role-based redactions

Estimated time

01:00

Overview

This unit describes how to configure and implement role-based redactions.

How you will check your progress

- Review
- Exercise

References

https://www.ibm.com/support/knowledgecenter/SSEUEX_3.0.6/com.ibm.installingeuc.doc/eucco140.htm

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Unit objectives

- Describe the advantages of role-based redactions
- Enable role-based redactions for a repository
- Configure redaction reasons, roles, and policies
- Work with role-based redactions

Role-based redactions

Figure 5-1. Unit objectives

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Topics

- What are role-based redactions?
- Configure role-based redactions
- Work with role-based redactions

Role-based redactions

Figure 5-2. Topics

5.1. What are role-based redactions?

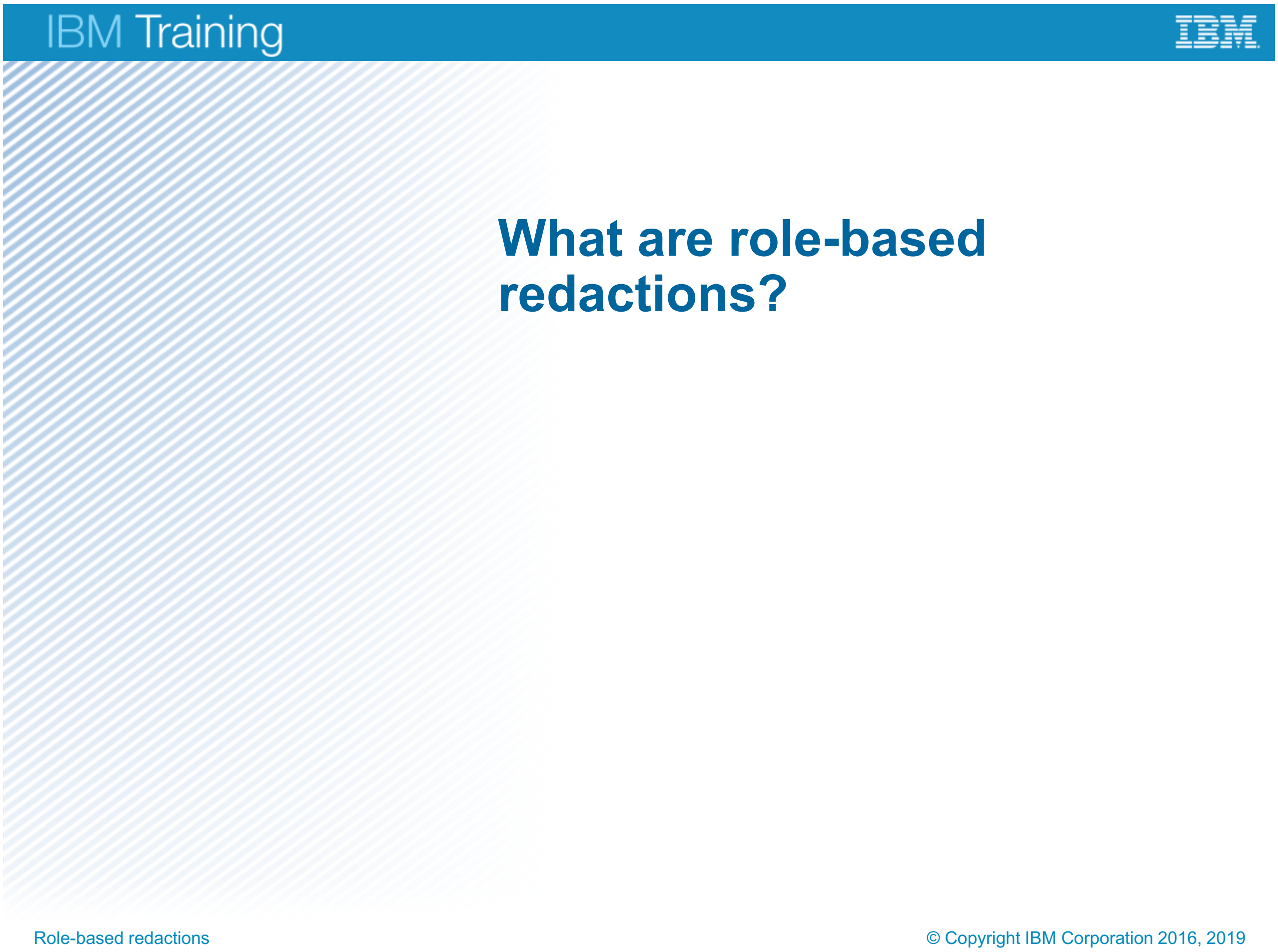

Figure 5-3. What are role-based redactions?

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What are role-based redactions?

- With role-based redactions, you:
  - Limit a user's exposure to sensitive data based on the user's business role
  - Use redaction policies that define the redactions to apply to a document
  - Maintain the same version of the document for different type of users
- Access to sensitive content is managed by role-based redaction:
  - Automatically applies a role-based redaction when a user is not authorized to view sensitive content
  - Does not apply a role-based redaction when a user is authorized to view sensitive content
  - Allows a user to add, modify, or delete a role-based redaction when a redaction policy grants that permission

Role-based redactions

Figure 5-4. What are role-based redactions?

One of the ways, IBM Content Navigator and IBM FileNet Content Manager address sensitive content and data regulatory impacts by introducing role-based redactions which limit a user’s access to sensitive content based on their business role.

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Examples of sensitive content

Sensitive content that is stored in repositories includes:

- Personally identifiable information (PII) or Sensitive personal information (SPI) such as:
  - Social security numbers
  - Credit card and other account numbers
  - Addresses, phone numbers
- Proprietary information:
  - Formulas
  - Recipes
  - Processes
  - Other intellectual properties

Role-based redactions

Figure 5-5. Examples of sensitive content

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Consequences when sensitive content is exposed

- Impact on customers (PII/SPI)
  - Fraudulent charges
  - Identity theft
- Fines from regulatory violations
- Loss of competitive advantage
- Negative impact on reputation
  - Customer confidence reduced
  - Stock price declines

Role-based redactions

Figure 5-6. Consequences when sensitive content is exposed

5.2. Configure role-based redactions

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Configure role-based redactions

Role-based redactions

Figure 5-7. Configure role-based redactions

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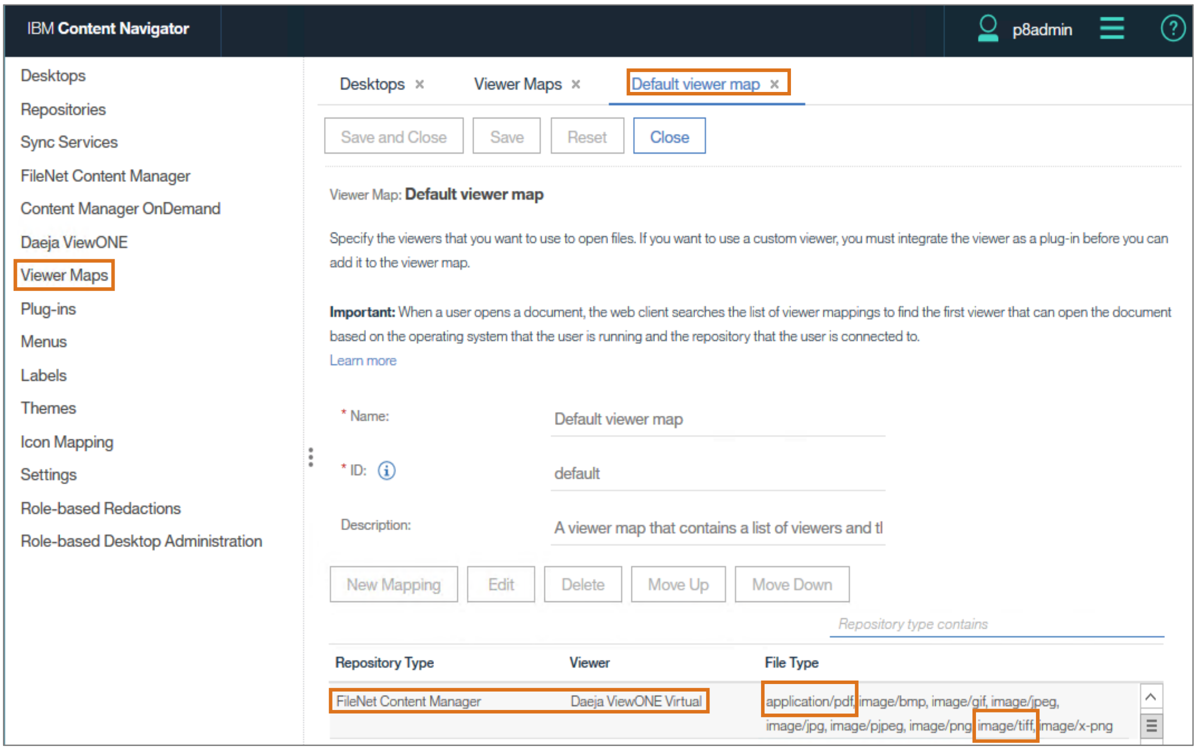
Requirements for role-based redactions



Role-based redactions

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Figure 5-8. Requirements for role-based redactions

The screen capture shows the viewer mapping configuration in IBM Content Navigator administration desktop.

Role-based redactions are supported for:

- IBM FileNet Content Manager repositories
- IBM Daeja ViewONE Virtual viewer
- TIFF and PDF file types

You must assign the Daeja ViewONE Virtual viewer for PDF and TIFF files for the IBM FileNet Content Manager repositories.

For more details on configuring the IBM Daeja ViewONE Virtual viewer, refer to: https://www.ibm.com/support/knowledgecenter/en/SSEUEX_3.0.6/com.ibm.installingeuc.doc/eucco118.htm

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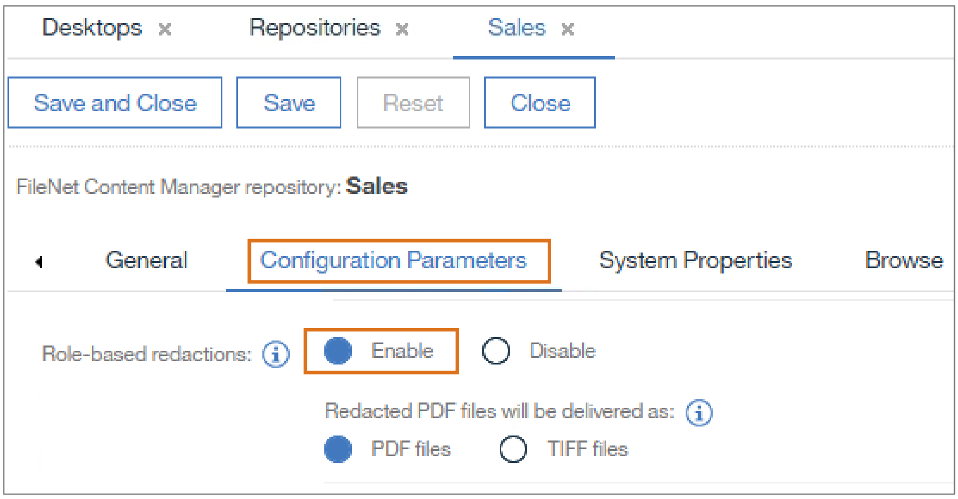
Enable role-based redactions for a repository

- Enable role-based redactions for a FileNet Content Manager repository in the IBM Content Navigator administration desktop.
  - On the Configuration Parameters tab of the repository configuration page



Role-based redactions

Figure 5-9. Enable role-based redactions for a repository

The screen capture shows the configuration for a FileNet Content Manager repository in the IBM Content Navigator administration desktop.

You can choose to deliver the redacted PDF files as PDF files (default) or TIFF files.

The repository add-on (IBM Content Navigator 3.0.0 Redaction Extensions) that supports role-based redactions is installed when you enable the feature. Add-ons cannot be removed after they are installed, but the role-based redactions feature can be disabled.

FileNet Content Manager repository administration is discussed in a separate course.

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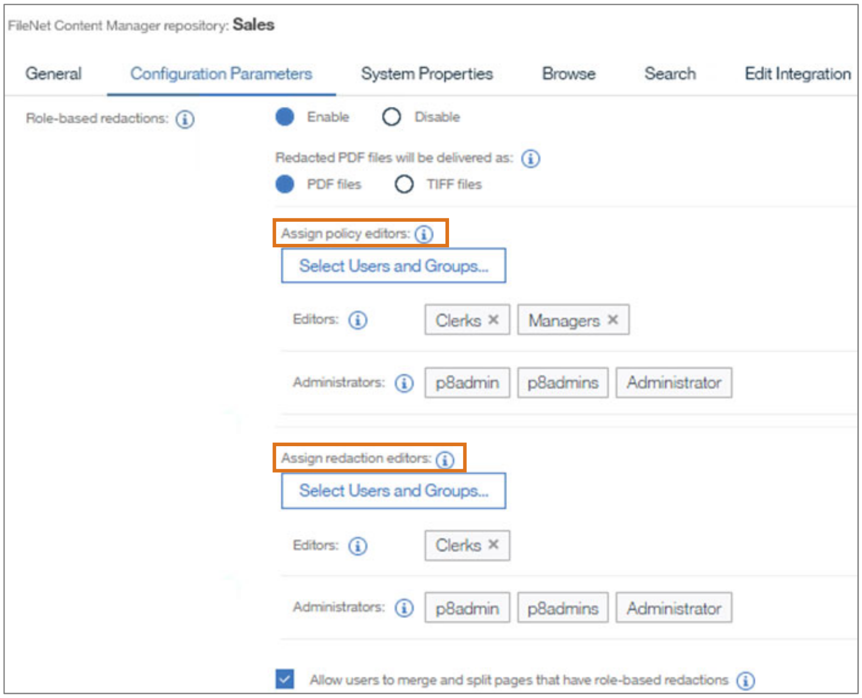
Assign redaction roles for a repository



Role-based redactions

Figure 5-10. Assign redaction roles for a repository

The screen capture shows the configuration for a FileNet Content Manager repository in the IBM Content Navigator administration desktop. For the role-based redactions, you can include users and groups for policy editors and redaction editors.

You can allow the users to merge and split pages that have the role-based redactions.

Policy editors

- A policy editor is allowed to create, edit, and delete policies and roles.
- The creator of a policy or role is not granted any direct permissions to the policy or role. The creator has edit access only if the user is also a policy editor.
- Policies and roles are edited in the IBM Content Navigator administration tool, so the policy editors must also be IBM Content Navigator administrators.

Assign redaction editors

- A redaction editor is granted permission in the repository to create instances of the role-based redaction annotation class.
- When the redaction editor has permission to create annotations for the document, the final permission to create a role-based redaction for a particular reason is controlled by redaction policies.

- The creator of a role-based redaction is not granted any direct permissions to the redaction. Edit access is granted only by redaction policies.

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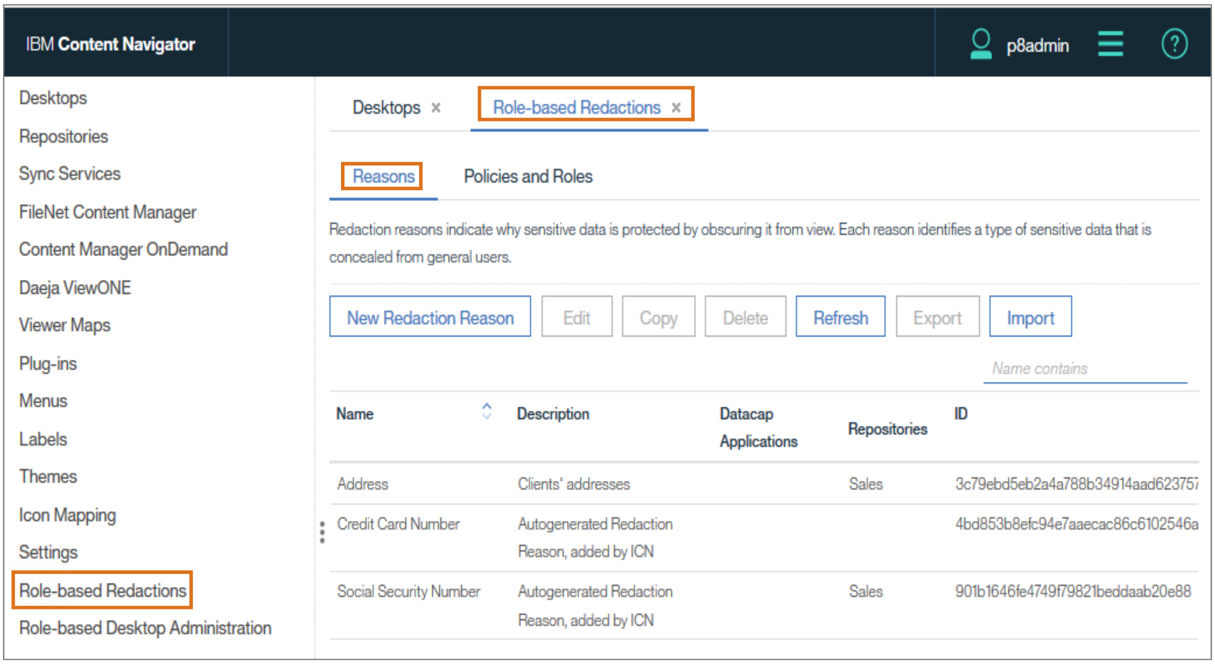
Role-based Redactions settings - Reasons tab



Role-based redactions

Figure 5-11. Role-based Redactions settings - Reasons tab

The screen capture shows the Role-based Redactions settings in the IBM Content Navigator administration page. It includes the Reasons and Policies and Roles subtabs.

On the Reasons subtab, by default two autogenerated redaction reasons are available: Credit Card Number and Social Security Number. In addition, a user-created reason that is called Address is listed.

The Redaction reasons indicate why sensitive data is protected by obscuring it from view. Redaction reasons identify the type of sensitive data that is redacted.

A redaction reason:

- Has a Name, Description, and unique ID (GUID)
- Is assigned to each role-based redaction annotation
- Is connected to role permissions by a policy

The Reasons tab manages redaction reason definitions.

- Redaction reason definitions are stored in the IBM Content Navigator configuration database. They can be used in any FileNet Content Manager repository that is enabled for role-based redaction. A reason that is in use cannot be deleted. Redaction reason definitions can be exported and imported.

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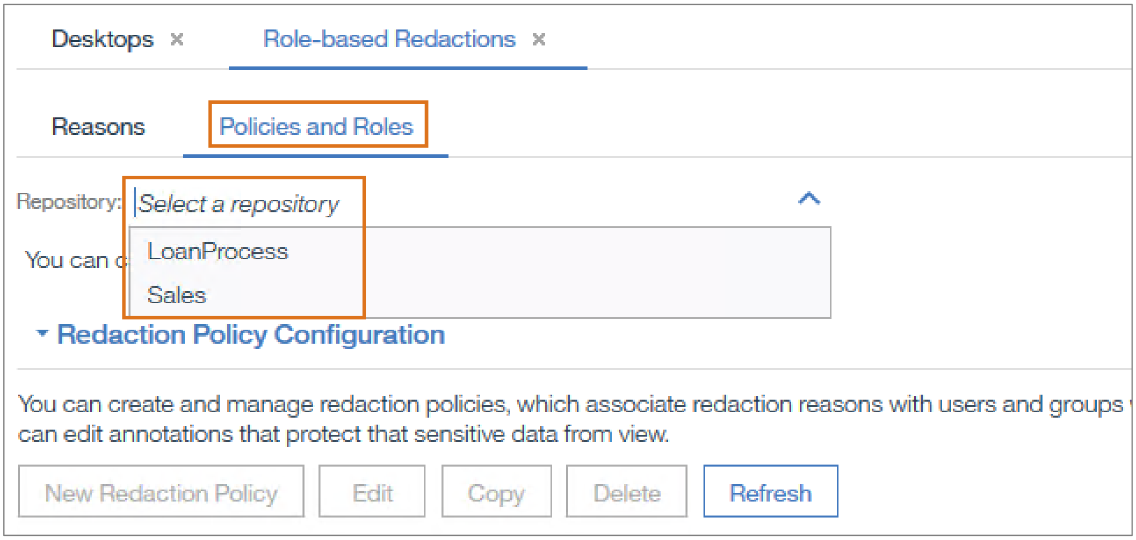
Role-based Redactions Settings - Repository selection

Policies and Roles subtab



Role-based redactions

Figure 5-12. Role-based Redactions Settings - Repository selection

The screen capture shows the Policies and Roles subtab on the Role-based Redactions tab. Repository option is highlighted.

If you enable role-based redactions for multiple FileNet Content Manager repositories in the IBM Content Navigator administration desktop, you can choose a repository to include redaction policies.

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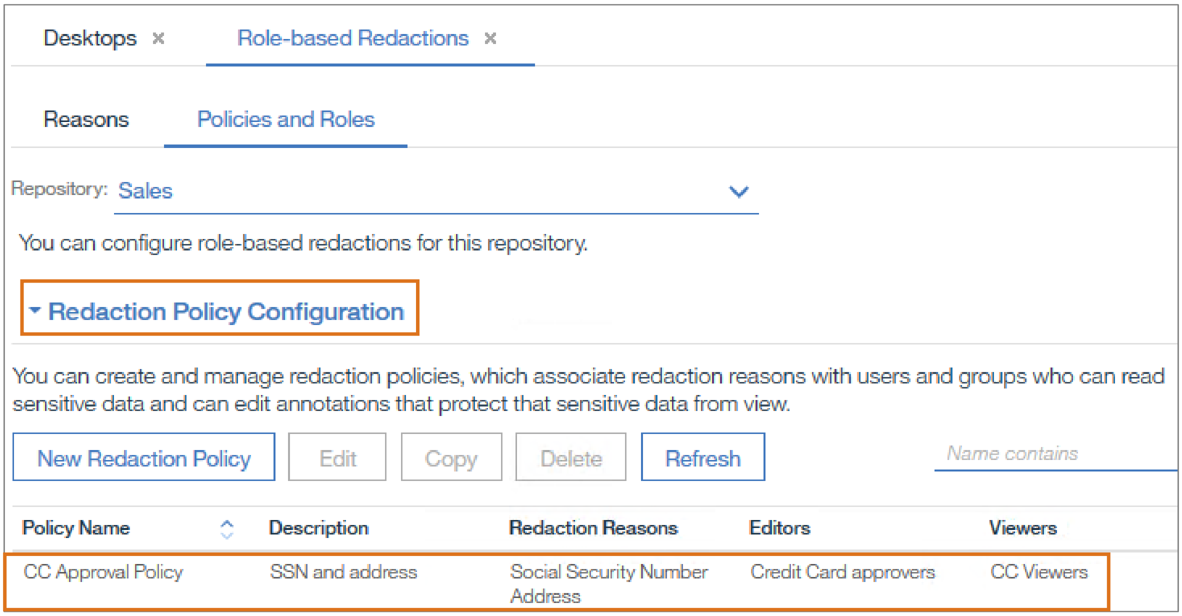
Redactions Policy Configuration

Role-based Redactions tab > Policies and Roles subtab



Role-based redactions

Figure 5-13. Redactions Policy Configuration

The screen capture shows the Policies and Roles subtab on the Role-based Redactions tab. Redactions policy configuration section and a user created policy are highlighted.

You can define user and group access for the redaction reasons in a policy and save them.

Policies and roles are managed by the policy editors who are selected in the repository configuration.

Redactions roles configuration section of the page is discussed in a following chart.

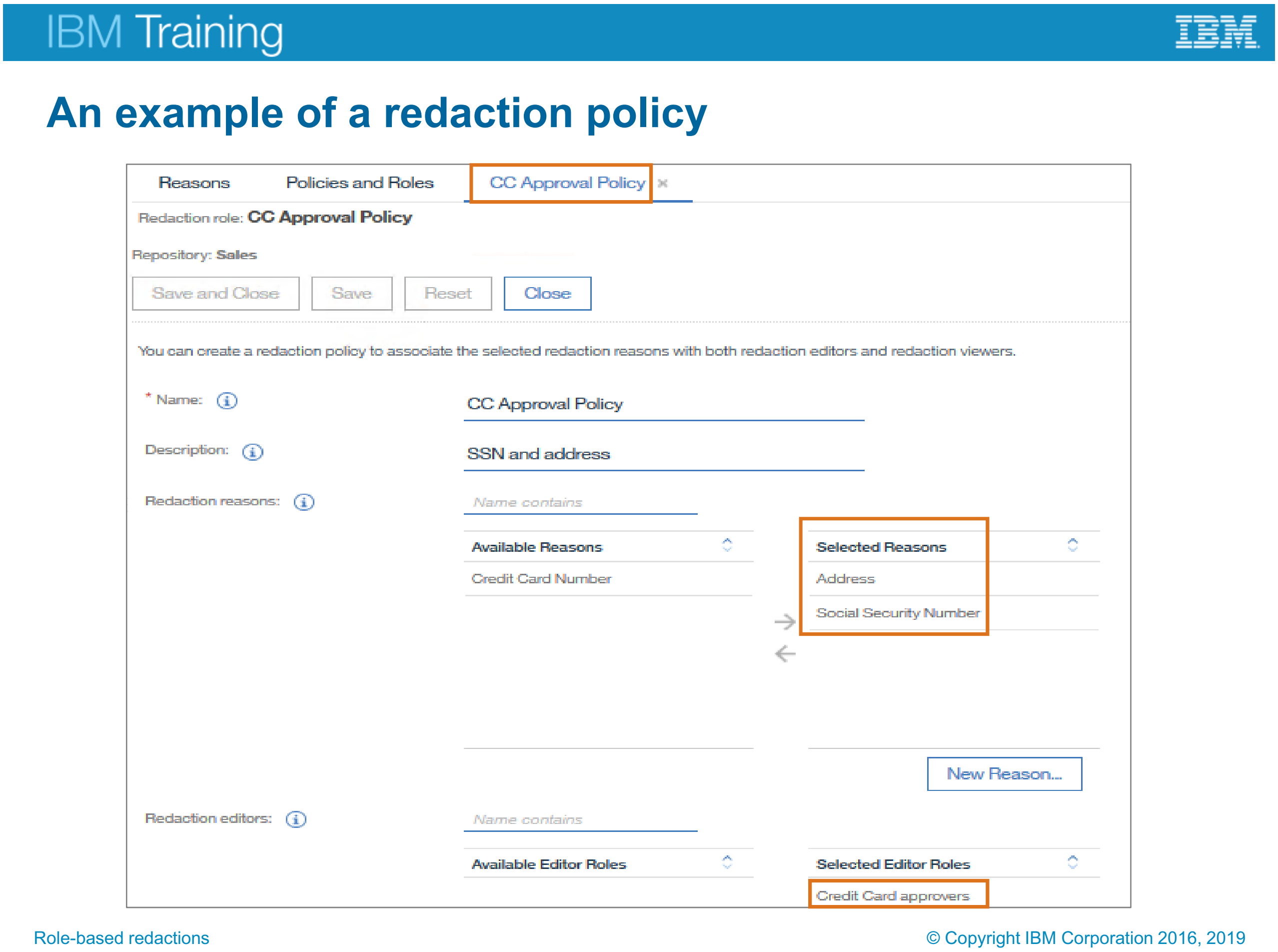


Figure 5-14. An example of a redaction policy

The screen capture shows the details for a redaction policy.

- Policies have a name, description, redaction reasons, redaction editor roles, and redaction viewer roles.
- A policy associates one or more viewer and editor roles with one or more redaction reasons.

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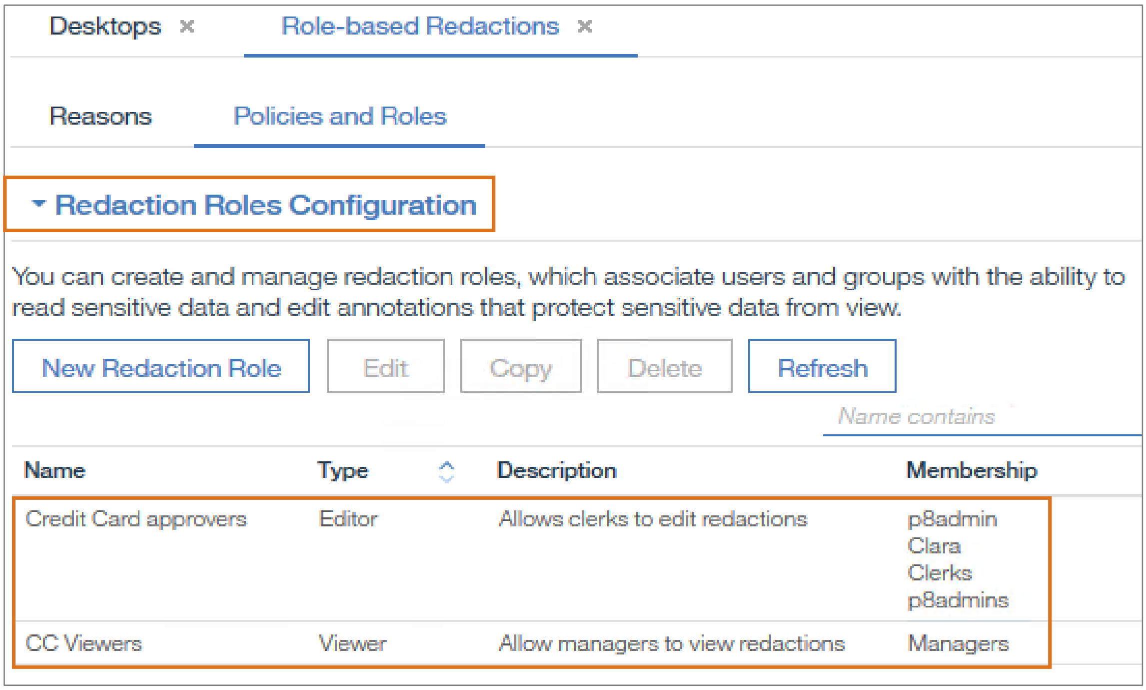
Redaction Roles Configuration

Role-based Redactions tab > Policies and Roles subtab



Role-based redactions

Figure 5-15. Redaction Roles Configuration

The screen capture shows the Policies and Roles subtab on the Role-based Redactions tab. The Redactions Roles Configuration section and the user created redaction roles are highlighted.

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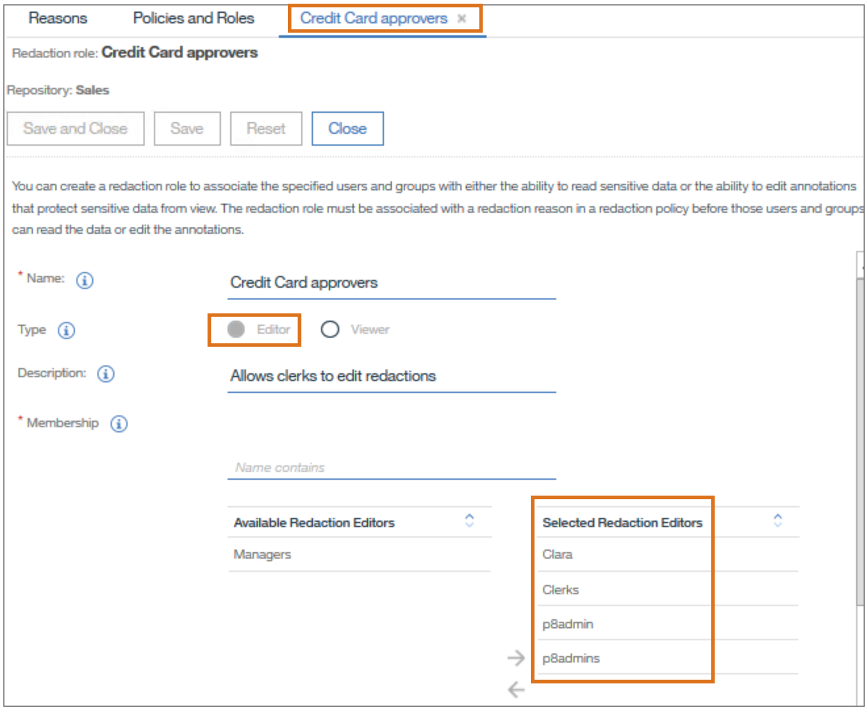
An example of a redaction role



Role-based redactions

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Figure 5-16. An example of a redaction role

The screen capture shows the details for a redaction role.

- Roles have a name, an access type of Viewer or Editor, a description, and membership.
- Each user or group is assigned Allow or Deny access.
- Deny assignments override Allow assignments when multiple roles are included in policies, and when multiple policies apply to a redaction reason.
- When a policy includes roles that grant both Viewer and Editor access to a user or group, the user or group gets the higher access (Editor).

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Security flow in role-based redactions

- A role grants or denies redaction viewer or editor permissions to users and groups.
- A redaction policy associates viewer and editor roles with redaction reasons
- Each redaction annotation has a redaction reason
  - The annotation is connected to the policy that includes the redaction reason

Role-based redactions

Figure 5-17. Security flow in role-based redactions

5.3. Work with role-based redactions

IBM Training

Work with role-based redactions

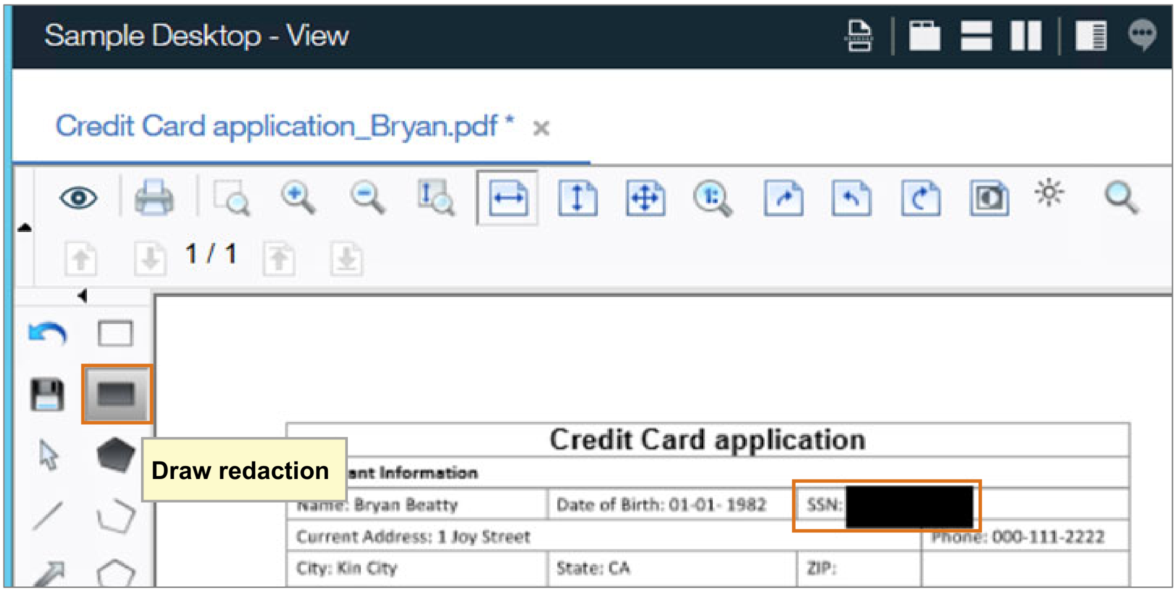
Role-based redactions

Figure 5-18. Work with role-based redactions

IBM Training

Add a redaction annotation

- In the Daeja ViewONE Virtual viewer, select the Draw redaction icon and draw a redaction annotation on the data that you want to redact
  - Example: SSN



Role-based redactions

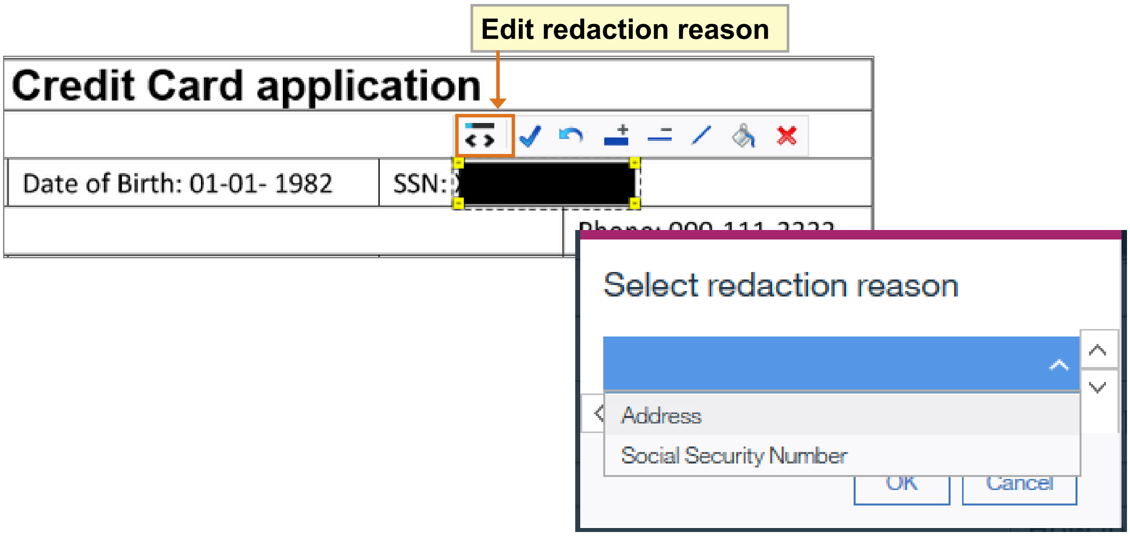
Figure 5-19. Add a redaction annotation

The screen capture shows the Draw redaction icon (highlighted) in the Daeja ViewONE Virtual viewer, and the redaction annotation on the data for the SSN field.

IBM Training

Assign a redaction reason to a redaction annotation

- Right-click the redaction to edit it and then assign a redaction reason.



Role-based redactions

Figure 5-20. Assign a redaction reason to a redaction annotation

The upper screen capture shows the Edit redaction reason icon (highlighted) in the Daeja ViewONE Virtual viewer. When you right-click a redaction, the toolbar is shown. The lower screen capture shows the Select redaction reason list.

A user with the redaction editor permission (for a redaction reason by a policy) can assign the redaction reason to a redaction annotation in Daeja ViewONE Virtual viewer.

- When you assign a redaction reason to a redaction annotation, it is converted into a role-based redaction annotation.
- If you saved a redaction annotation first and then assign a redaction reason later, the original redaction annotation is deleted and replaced by the new role-based redaction annotation.

A user with the redaction editor permission can also change the following items for an existing role-based redaction annotation:

- The properties (size, color, and location)
- The redaction reason to another reason for which the user is an editor

IBM Training

Toggle to see the redacted data

- With Editor permissions, you can toggle to the transparency mode to see the data through the redactions.

Figure 5-21. Toggle to see the redacted data

The screen capture shows the Toggle redaction visibility icon (highlighted) in the Daeja ViewONE Virtual viewer and the redacted area with a gray background.

IBM Training

Working with role-based redactions - viewers and editors

- For a user with viewer or editor permissions for a redaction reason, the redactions for that reason are not burned in:
  - To the thumbnail view of the document for that user
  - When the user downloads the document
- When a user views the document in the Daeja ViewONE Virtual viewer, and the user has:
  - Viewer access, the redactions are not burned in and are not passed in as annotations
  - Editor access, the redactions are not burned and they are passed in as role-based redaction annotations for editing.

Role-based redactions

Figure 5-22. Working with role-based redactions - viewers and editors

In an example scenario, a user does not have the viewer or editor permissions for a redaction reason. When the user retrieves a document with role-based redactions, the document is retrieved and the redactions for that reason are permanently burned in before it is delivered to the user.

This dynamic burn-in is applied when the user:

- Clicks the document to see the thumbnail of the document
- Downloads the document
- Views the document in the Daeja ViewONE Virtual viewer

IBM Training

How do you share documents with role-based redactions?

- You cannot share a document with role-based redactions on Box
  - You can copy it to Box, but the role-based redactions are automatically burned in even if the user has viewer or editor access
  - You can download the redacted document (burned in) and share it through emails as an attachment

Role-based redactions

Figure 5-23. How do you share documents with role-based redactions?

IBM Training

Sensitive Content property

- An integer-valued property that is called Sensitive Content is added to the Document class
  - As part of the role-based redaction add-on extension
- The property value indicates whether a document contains or might contain sensitive content based on what is configured for sensitive data in the repository.

Value	Label
Null	
0	Does not contain sensitive content
1	Contains sensitive content
2	Processing for sensitive content is pending
3	May contain sensitive content

Role-based redactions

Figure 5-24. Sensitive Content property

Value: null

- The default value for the Sensitive Content property
- The document is not expected to contain sensitive content and is not examined for sensitive content
- No role-based redactions exist

Value: 0 - Does not contain sensitive content

- The document is examined for sensitive content and no sensitive content is found
- The examination for sensitive content is complete
- No role-based redactions exist

Value: 1 - Contains sensitive content

- The document is examined for sensitive content and sensitive content is found
- The examination for sensitive content is complete
- The document contains sensitive content and is fully redacted
- Role-based redactions exist

Role-based redactions are burned in dynamically when a user retrieves a document. They are not applied to the document that is stored in the repository. It is a good practice to disable full-text indexing for documents that contain or might contain sensitive content.

Value: 2 - Processing for sensitive content is pending

- The document is processed for automated discovery of sensitive content.
- It might contain sensitive content that is not yet redacted
- The examination for sensitive content is not complete
- Role-based redactions might exist

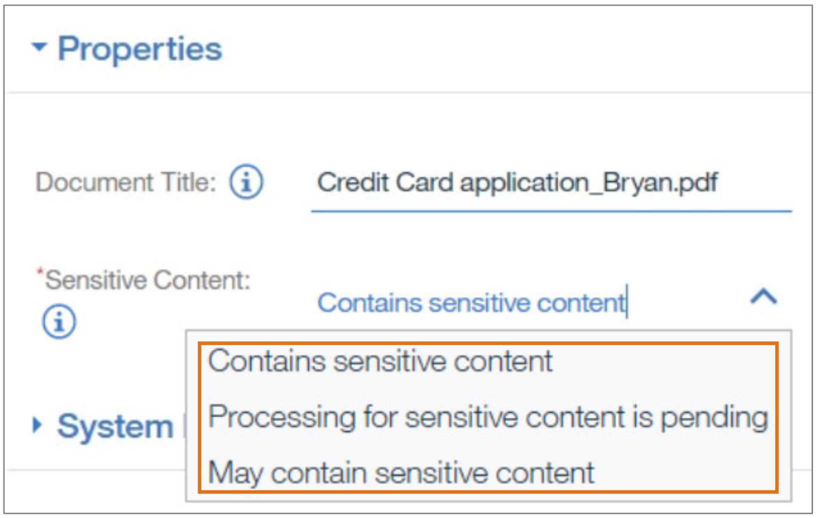
Value: 3 - May contain sensitive content

- The document may contain sensitive content that is not yet redacted
- The examination for sensitive content is not complete
- Role-based redactions may exist

IBM Training

Update the Sensitive Content value

- A user with editor access to the redaction reasons can update the property value:
  - On the property editor of the viewer page



Role-based redactions

Figure 5-25. Update the Sensitive Content value

The screen capture shows the allowed choices for the Sensitive Content value for a document if it contains role-based redactions.

If the review of the redaction for the document is not complete, an editor must change the value to May contain sensitive content.

If the review of the redaction for the document is complete and assuming that sensitive data was found in the document, an editor must change the value to Contains sensitive content.

IBM Content Navigator updates the Sensitive Content property value automatically when:

- Annotation changes are saved
- A document is checked in

The Sensitive Content property is not available for editing on the Properties page or in document information pane on the Browse page.

IBM Training

Prevent access based on the Sensitive Content value

- You can configure a FileNet Content Manager repository in the following ways to restrict the access to documents with sensitive content:
  - Markings (access based on the value of the Sensitive Content property)
  - Security proxies and security inheritance
  - Security Policies
  - Direct changes to document security

Role-based redactions

Figure 5-26. Prevent access based on the Sensitive Content value

There are various ways to prevent access to a document that is not cleared for general access. You can apply a strategy that best fits your use cases.

Some of the strategies that are listed on the chart are discussed in the FileNet P8 Platform administration courses.

IBM Training

Can you search documents based on sensitive content?

- All users are allowed to search based on the Sensitive Content property
- You can prevent users from creating searches that use the Sensitive Content property
  - Add the property to the list of filtered search attributes

Role-based redactions

Figure 5-27. Can you search documents based on sensitive content?

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Unit summary

- Describe the advantages of role-based redactions
- Enable role-based redactions for a repository
- Configure redaction reasons, roles, and policies
- Work with role-based redactions

Role-based redactions

Figure 5-28. Unit summary

IBM Training

Review questions

1. True or False: To use the role-based redaction feature, you must enable the role-based redactions in the IBM Content Navigator repository configuration for a FileNet Content Manager repository.

2. Which of the following file formats are supported for the role-based redactions? (Choose two)
   A. PNG
   B. JPEG
   C. TIFF
   D. BMP
   E. PDF

3. True or False: For a redaction editor, the redactions for a document are not burned in and are not passed into the viewer as role-based redaction annotations.

Role-based redactions

Figure 5-29. Review questions

Write your answers here:

1.

2.

3.

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Review answers

1. True or False: To use the role-based redaction feature, you must enable the role-based redactions in the IBM Content Navigator repository configuration for a FileNet Content Manager repository.
   The answer is True.
2. Which of the following file formats are supported for the role-based redactions? (Choose two)
   A. PNG
   B. JPEG
   C. TIFF
   D. BMP
   E. PDF
   The answer is C and E.
3. True or False: For a redaction editor, the redactions for a document are not burned in and are not passed into the viewer as role-based redaction annotations.
   The answer is False.

Role-based redactions

Figure 5-30. Review answers

The correct answer to Question 3 is:

For a redaction editor, the redactions for a document are not burned in. They are passed into the viewer as role-based redaction annotations so that they have access to edit them.

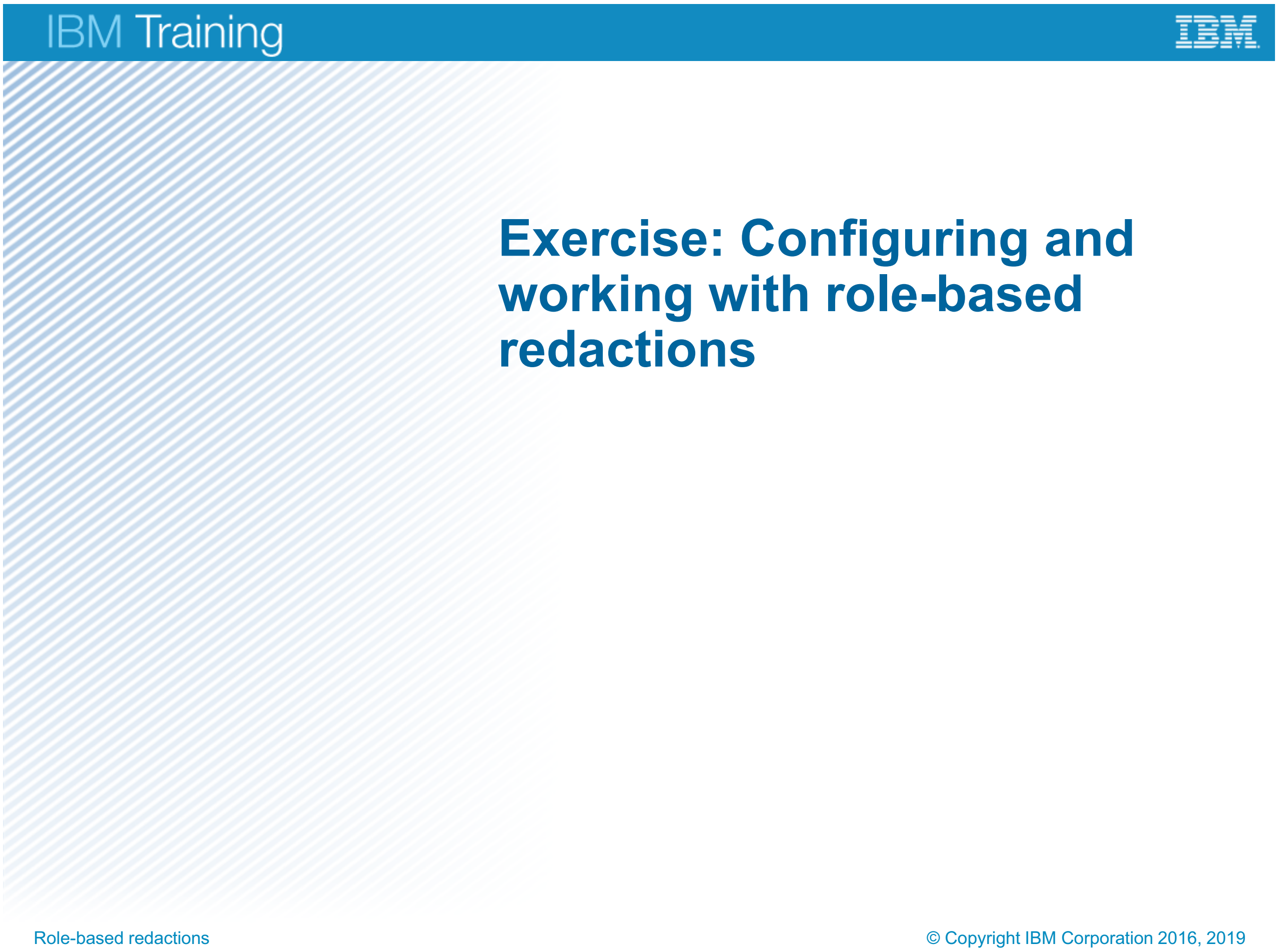


Figure 5-31. Exercise: Configuring and working with role-based redactions

IBM Training

Exercise objectives

- Enable role-based redactions for a repository
- Configure redaction reasons, roles, and policies
- Work with role-based redaction annotations

Role-based redactions

Figure 5-32. Exercise objectives

Unit 6. IBM Content Navigator Sync

Estimated time

01:00

Overview

This unit teaches you how to configure IBM Content Navigator Sync and sync content across multiple devices.

How you will check your progress

- Review
- Exercise

References

https://www.ibm.com/support/knowledgecenter/SSEUEX_3.0.6/com.ibm.usingeuc.doc/euche045.htm

IBM Training

Unit objectives

- Describe the IBM Content Navigator Sync feature
- Configure IBM Navigator Sync
- Sync content across multiple devices
- Resolve sync conflicts

Figure 6-1. Unit objectives

IBM Training

Topics

- What is IBM Content Navigator Sync?
- Configure IBM Content Navigator Sync services
- Sync content across multiple devices

IBM Content Navigator Sync

Figure 6-2. Topics

6.1. What is IBM Content Navigator Sync?

IBM Training

What is IBM Content Navigator Sync?

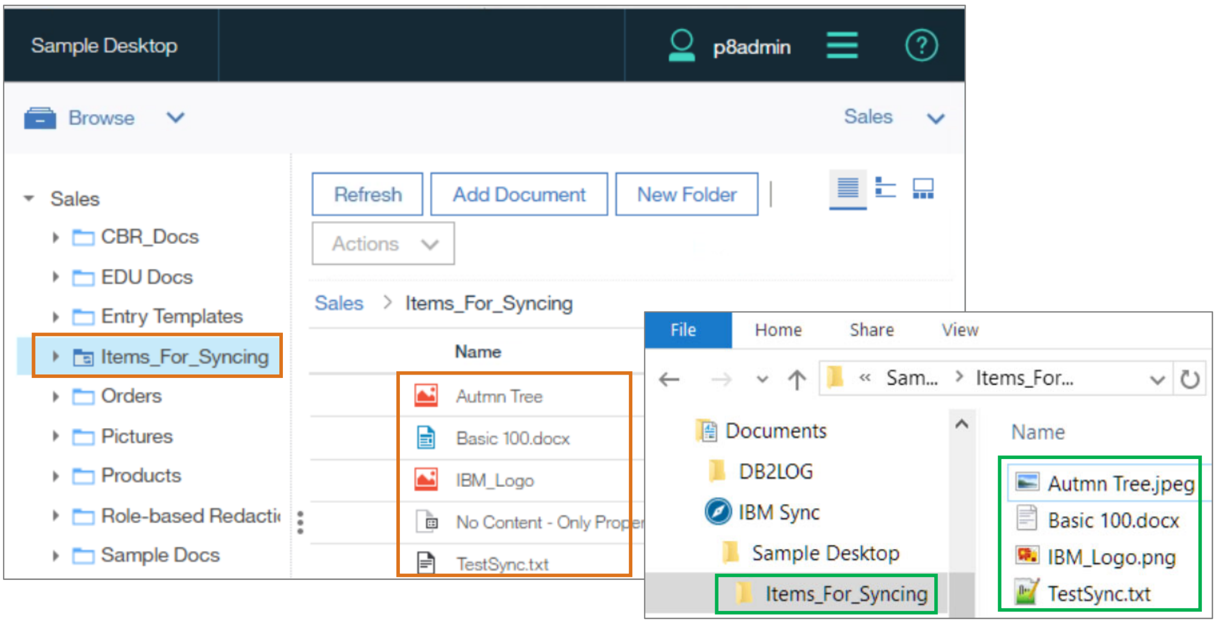
IBM Content Navigator Sync

Figure 6-3. What is IBM Content Navigator Sync?

IBM Training

What is IBM Content Navigator Sync?

- The Sync services provide two-way synchronization of repository objects with different devices.



IBM Content Navigator Sync

Figure 6-4. What is IBM Content Navigator Sync?

The left screen capture shows the sync-enabled repository folder (marked in orange) on the Browse page in the IBM Content Navigator desktop. If you add this folder as a favorite, you can also view the folder on the Home page for easy access.

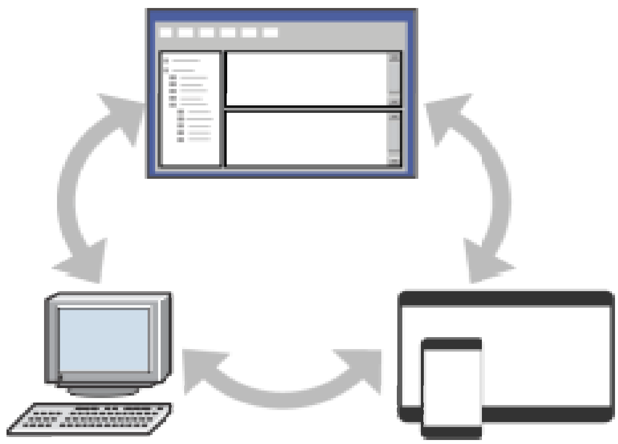
The right screen capture shows the Windows Explorer folder that is used by sync (marked in green).

All the items in the sync-enabled folder of the FileNet Content Manager repository (shown in IBM Content Navigator) are synced to the local folder except the No Content,-Only Properties document in the repository. This specific document is not listed in the local folder because the document does not have content (contains only information about the product in the properties). Sync client does process documents that have no content, but they are not listed on the file system. It syncs the documents automatically when the user checks in a new version with content, and once that occurs, the file is listed in the file system.

IBM Training

How does IBM Content Navigator Sync help?

- Synchronizes content across multiple devices
- Save time with sync
  - No need to manually check out, check in, and download items
  - The file is automatically checked in to the repository



IBM Content Navigator Sync

Figure 6-5. How does IBM Content Navigator Sync help?

The diagram shows how the content is synced across multiple devices.

Users can collaborate on projects (folders and documents) that are stored in an existing repository by using their desktop or mobile devices. When you modify and save documents locally in folders that are enabled for sync, the documents are automatically checked in to the repository with the changes. Similarly, locally added folders are synced to the repository. The changes are also synced across all your devices. The latest version of the document is available for all the users.

6.2. Configure IBM Content Navigator Sync services

IBM Training

Configure IBM Content Navigator Sync services

IBM Content Navigator Sync

Figure 6-6. Configure IBM Content Navigator Sync services

IBM Training IBM

Configure a system for the Sync services

High-level steps to configure Sync

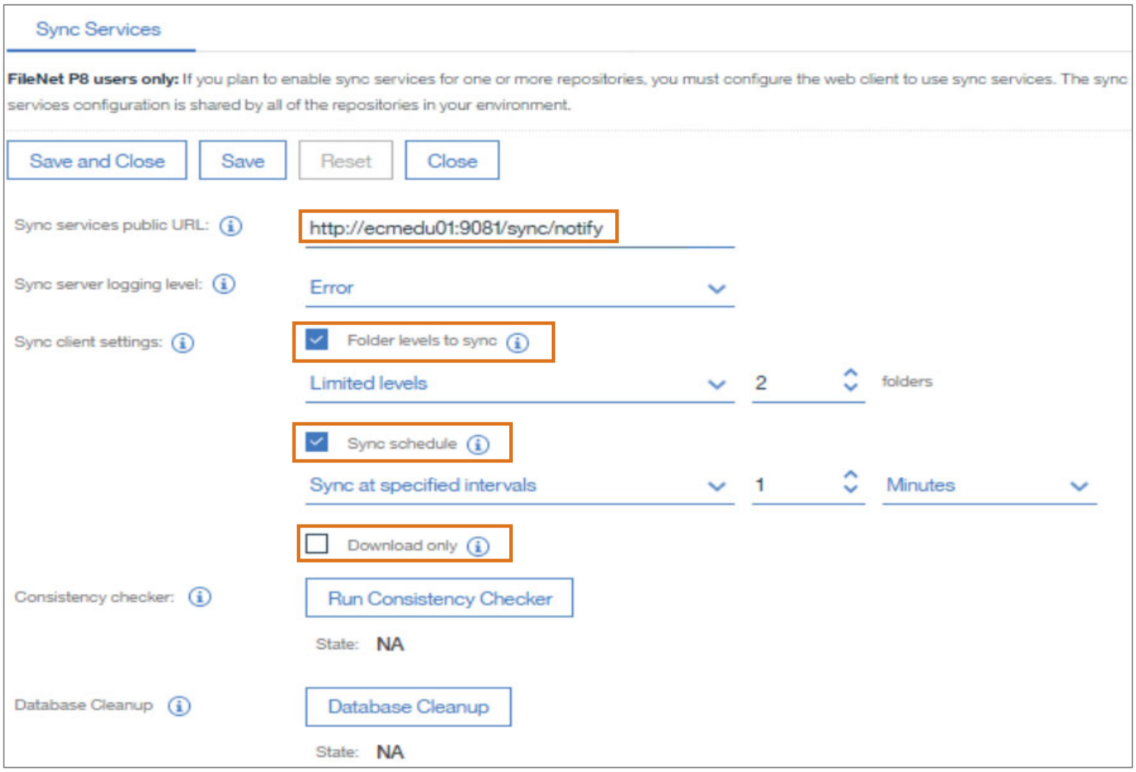
- Configure Sync services on the administration desktop
- Enable the sync feature for:
  - A Repository
  - An IBM Content Navigator desktop
  - A repository folder
  - A teamspace
- Install and configure Sync client

IBM Content Navigator Sync

Figure 6-7. Configure a system for the Sync services

IBM Training

Configure IBM Content Navigator Sync services



IBM Content Navigator Sync

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Figure 6-8. Configure IBM Content Navigator Sync services

The screen capture shows the IBM Content Navigator Sync services configuration.

Sync services public URL

Enable sync services by specifying the URL by which repositories can communicate with the IBM Content Navigator Sync services. . The default format of the URL is: http://<icn server>:<port_number>/sync/notify

Sync server logging level

- Logging level determines how much information is stored on the server. The Error level captures the least amount of the information and Debug level captures the most information.
- To prevent any performance impact, do not specify Debug in the production environment unless it is asked by the IBM software support.

Sync client settings:

- **Folder levels to sync**
  - Available options are: All Subfolders, No subfolders, or Limit levels
  - Example for the Limit levels option: If you select 2 for folders, it syncs the folder that the user selects and one level of subfolder under that folder.

- **Sync schedule**

  Available options are: Sync manually or sync at specific intervals

- **Download only**

  If you select this option, it prevents all Sync clients from uploading any new documents or document changes to the server.

  All the documents that are downloaded in this mode are read-only.

- **Consistency checker**
  - This feature ensures that the Sync service databases have current information about the status of each item that is on the server.
  - Run this tool after any interruptions in service such as a database outage.
  - Example scenario:

    If the Sync service is down but repository is running, it is possible that the repository is generating events that don’t reach the Sync server. After a Sync service database outage, you want to get information about documents that were updated on the repository during the outage. When the Sync service is restored, run the consistency checker so that any missed updates are found and delivered to the Sync clients.

- **Database Cleanup**

  Run this tool to remove information about unused devices.

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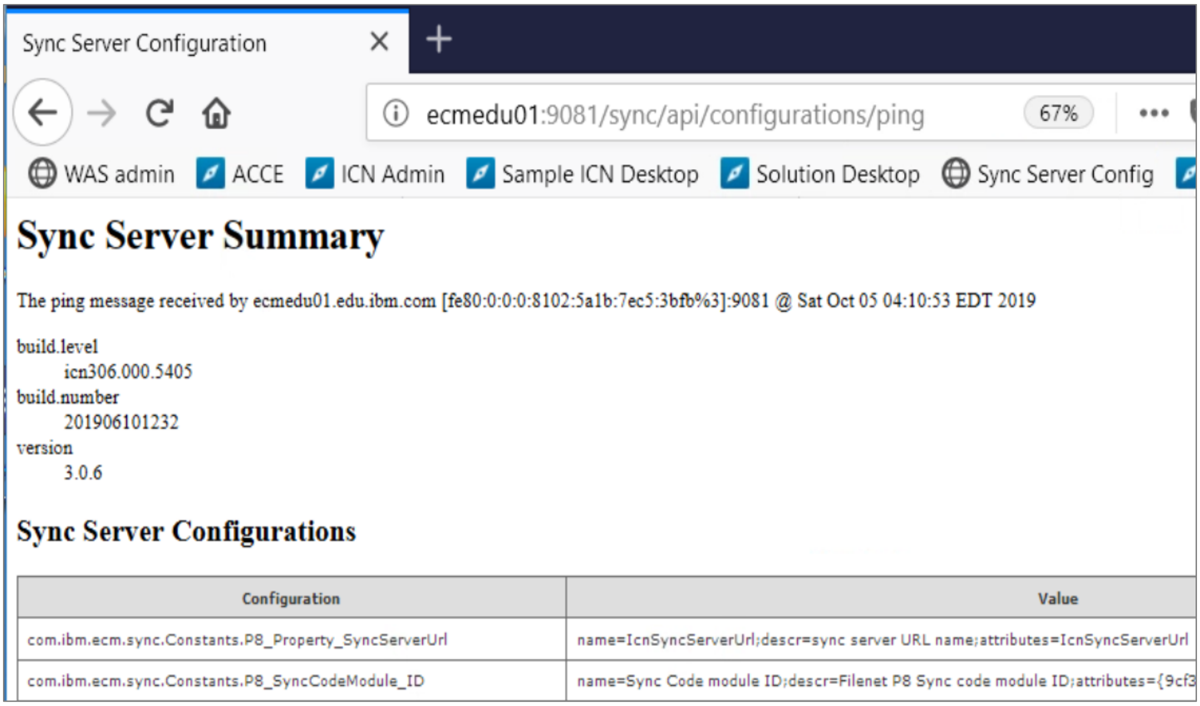
Sync Server Summary page



IBM Content Navigator Sync

Figure 6-9. Sync Server Summary page

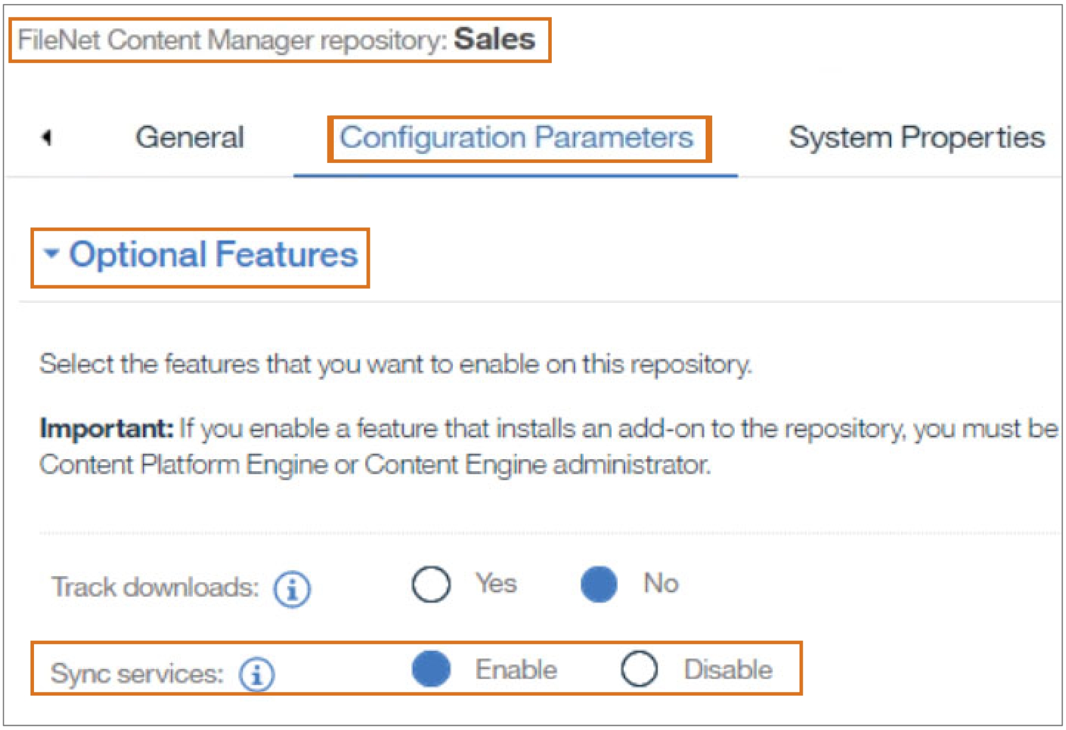
The screen capture shows the Sync Server Summary page. The product version and configuration information are shown. It indicates that the Sync services are running.

To verify that the Sync services are running, open the Sync Server Summary page: http://<server name>:port/sync/api/configurations/ping

Example URL: http://ecmedu01:9081/sync/api/configurations/ping

IBM Training

Enable Sync services for a repository



IBM Content Navigator Sync

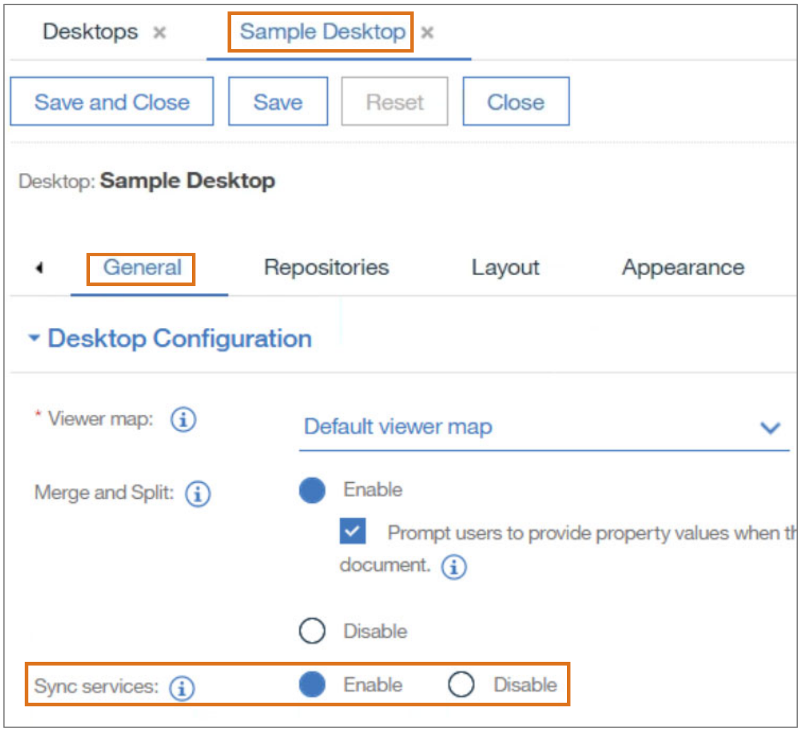
Figure 6-10. Enable Sync services for a repository

The screen capture shows the Sync services configuration (enable option) for an IBM FileNet Content Manager repository.

Connect to the repository. On the Configuration Parameters > Optional Features section, enable the Sync services.

IBM Training

Enable Sync services for an IBM Content Navigator desktop



IBM Content Navigator Sync

Figure 6-11. Enable Sync services for an IBM Content Navigator desktop

The screen capture shows the Sync services configuration for an IBM Content Navigator desktop where the repository is configured.

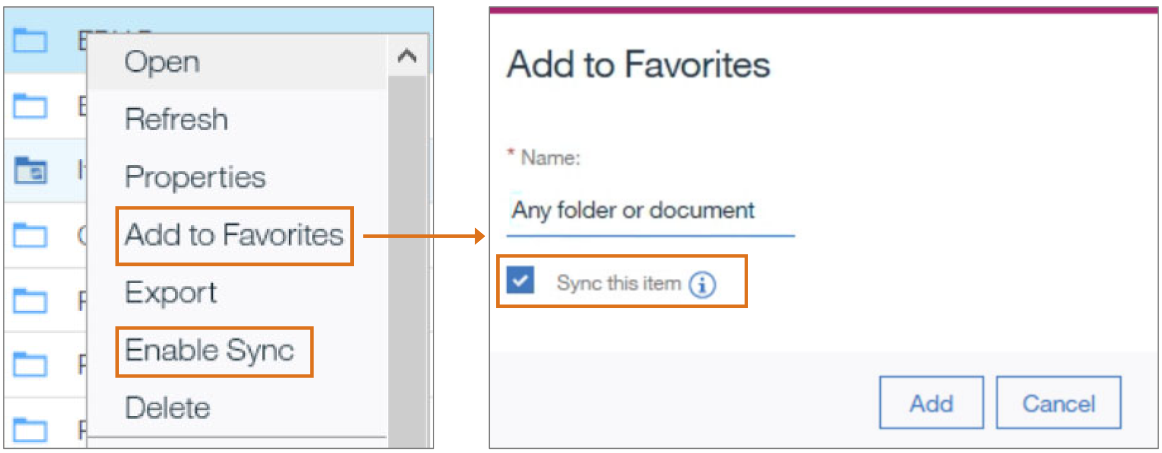
Enable the Sync services for an IBM Content Navigator desktop on the General> Desktop configuration section.

IBM Training

Enable a repository folder for sync

1. Right-click a folder and select an action from the list

2. Add to favorites and enable sync in one step



IBM Content Navigator Sync

Figure 6-12. Enable a repository folder for sync

On the left screen capture, you right-click a repository folder (or a document) and select an action from the list.

When you select Add to Favorites, you can enable sync for that folder and also add the folder to Favorites in the IBM Content Navigator desktop in one step.

After a folder is enabled for sync, it can be synced on any operating system that is Sync-supported (Example: Windows, Android, or iPhone).

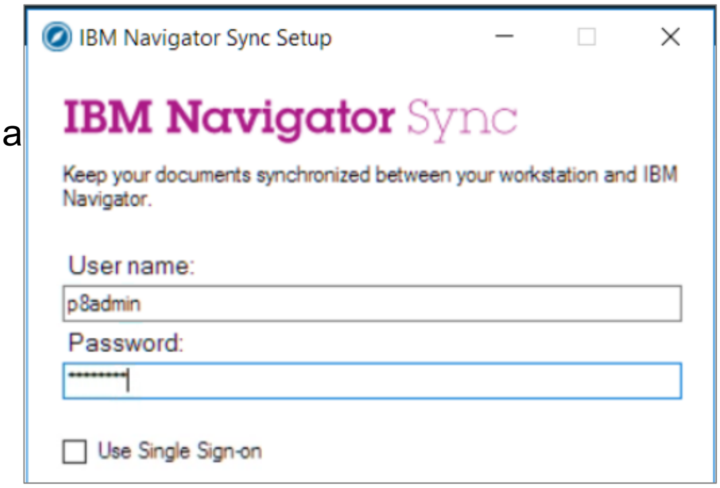
If you select Enable Sync, you enable sync for that folder. Then optionally, you can select Add to Favorites.

IBM Training

IBM Content Navigator Sync client - Welcome wizard

When you use sync for the first time on a device, the Welcome wizard displays.

- Provide log on credentials for the repository
- Provide a URL address for a desktop
- A local sync folder is automatically created
- The file system top-level folder for the desktop is named after the desktop name



IBM Content Navigator Sync

Figure 6-13. IBM Content Navigator Sync client - Welcome wizard

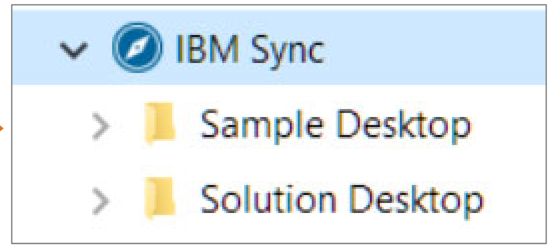
The screen capture shows the Welcome wizard for the Sync client.

- In the Welcome wizard, specify the IBM Content Navigator desktop URL. If you do not specify a desktop in the URL, the default desktop is used.
- Sync services creates the new sync folder in the path that you specified during the configuration.
- You can add more desktops later in the IBM Content Navigator Sync Preferences.
  - Each desktop that you add in Preferences creates a folder on your workstation or mobile device for that desktop in your sync folder.
  - Do not modify the desktop level folders that IBM Content Navigator Sync creates automatically.
  - Users must have privileges to read/write to the folder.
  - If you do not specify a desktop, the Sync client uses the default one.
- Each desktop folder shows any subfolders and documents that you enable for sync.
  - You can modify and rename the subfolders.
- You can begin working with the files immediately. Any changes that you save are synced during your next scheduled sync.

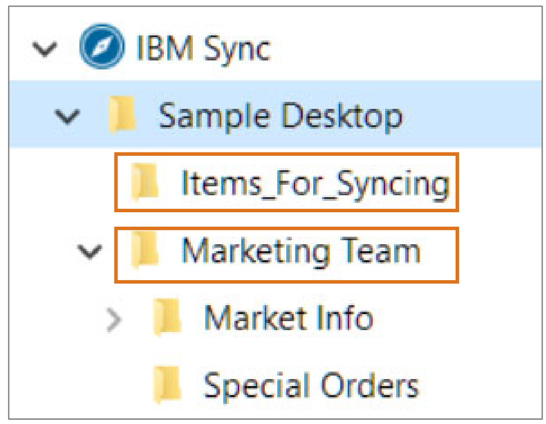
IBM Training

Local sync folder structure

Each desktop that you add in Preferences creates a folder for that desktop under the sync root folder.



- Each desktop folder contains repository folders that are enabled for sync.
- It also contains the synced teamspaces and their folders.



IBM Content Navigator Sync

Figure 6-14. Local sync folder structure

The upper screen capture shows the local sync folders for each IBM Content Navigator desktop. Example desktops: Sample Desktop and Solution Desktop.

The lower screen capture shows a repository folder (for a desktop) that is enabled for sync. Example folder: Items_For_Syncing.

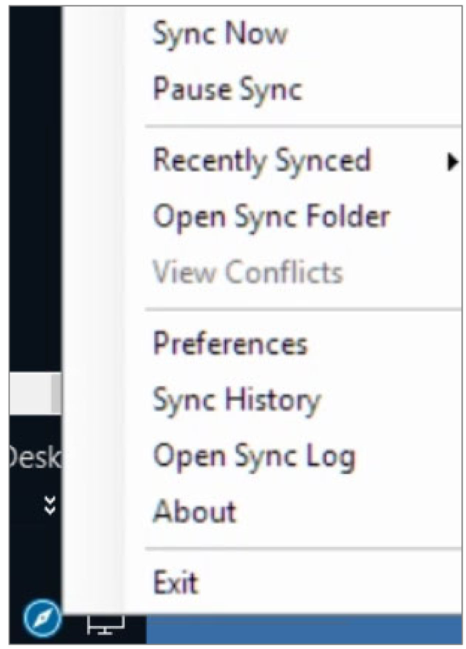
It also shows a teamspace that is enabled for sync and its subfolders (for a desktop). Example teamspace: Marketing Team.

IBM Training

Sync client actions

On your workstation, right-click the sync icon from the taskbar to access the actions.

- Sync Now
  For immediate syncing
- Pause Sync
- Recently Synced
- Open Sync folder
  For folders and documents access
- Preferences
  To configure more desktops
- Sync History
- Open Sync Log
- About
- Exit



IBM Content Navigator Sync

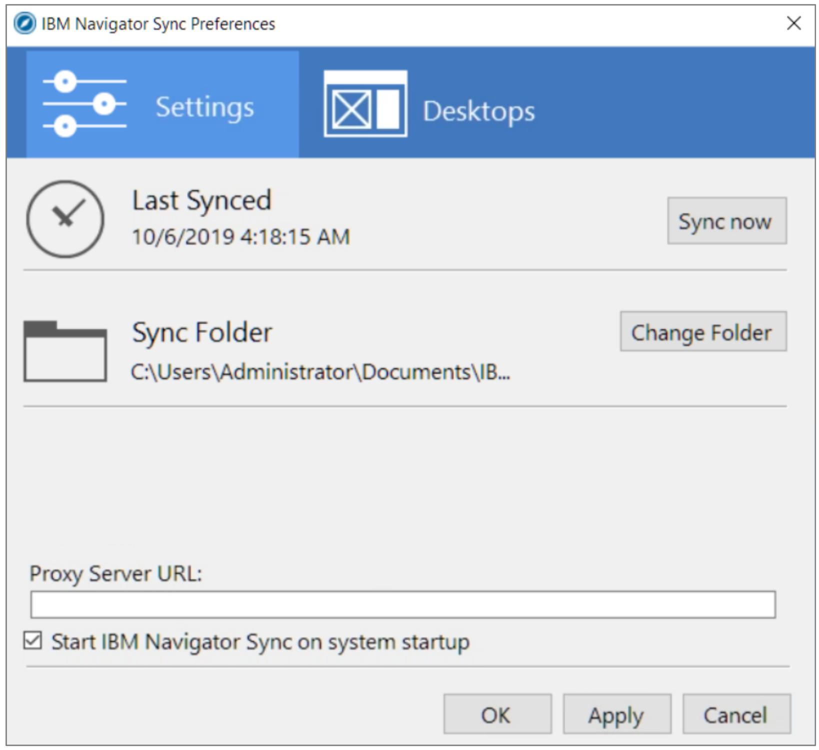
Figure 6-15. Sync client actions

The screen capture shows the actions that are available for the Sync client.

IBM Training

Sync client preferences: Settings

- Last Synced
- Sync Folder
- Start Sync on system startup



IBM Content Navigator Sync

Figure 6-16. Sync client preferences: Settings

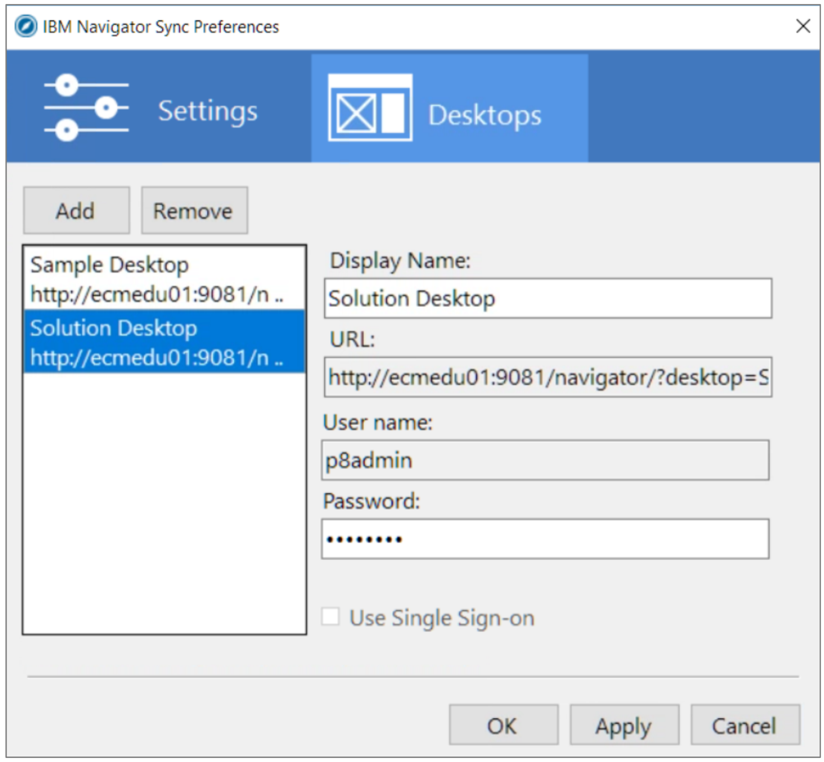
The screen capture shows the Sync Preferences > Settings tab. You can optionally change the default sync folder location on the workstation.

- IBM Content Navigator Sync creates the root-level sync folder for you automatically.
  - The default location is C:\Users\<username>\Documents\IBM Sync.
  - You access and modify your synced documents and folders on your workstation in the IBM Sync folder.
- Optionally, you can change the default folder.
  - If you need to modify the location of your local sync folder, modify it only in Sync Preferences.
  - Do not move the sync folder by dragging it to a different location in Windows Explorer.
  - When you change the folder that is used for sync, the contents are moved to the new folder that you specify. You don't lose any content.
  - You can also use a mapped network drive as your sync folder on the Windows Sync client.

IBM Training

Sync client preferences: Desktops

- Add an IBM Content Navigator desktop
- Remove an existing desktop



IBM Content Navigator Sync

Figure 6-17. Sync client preferences: Desktops

The screen capture shows Sync Preferences page > Desktops tab.

You can add one or more desktops in the IBM Content Navigator Sync Preferences or remove any existing desktops.

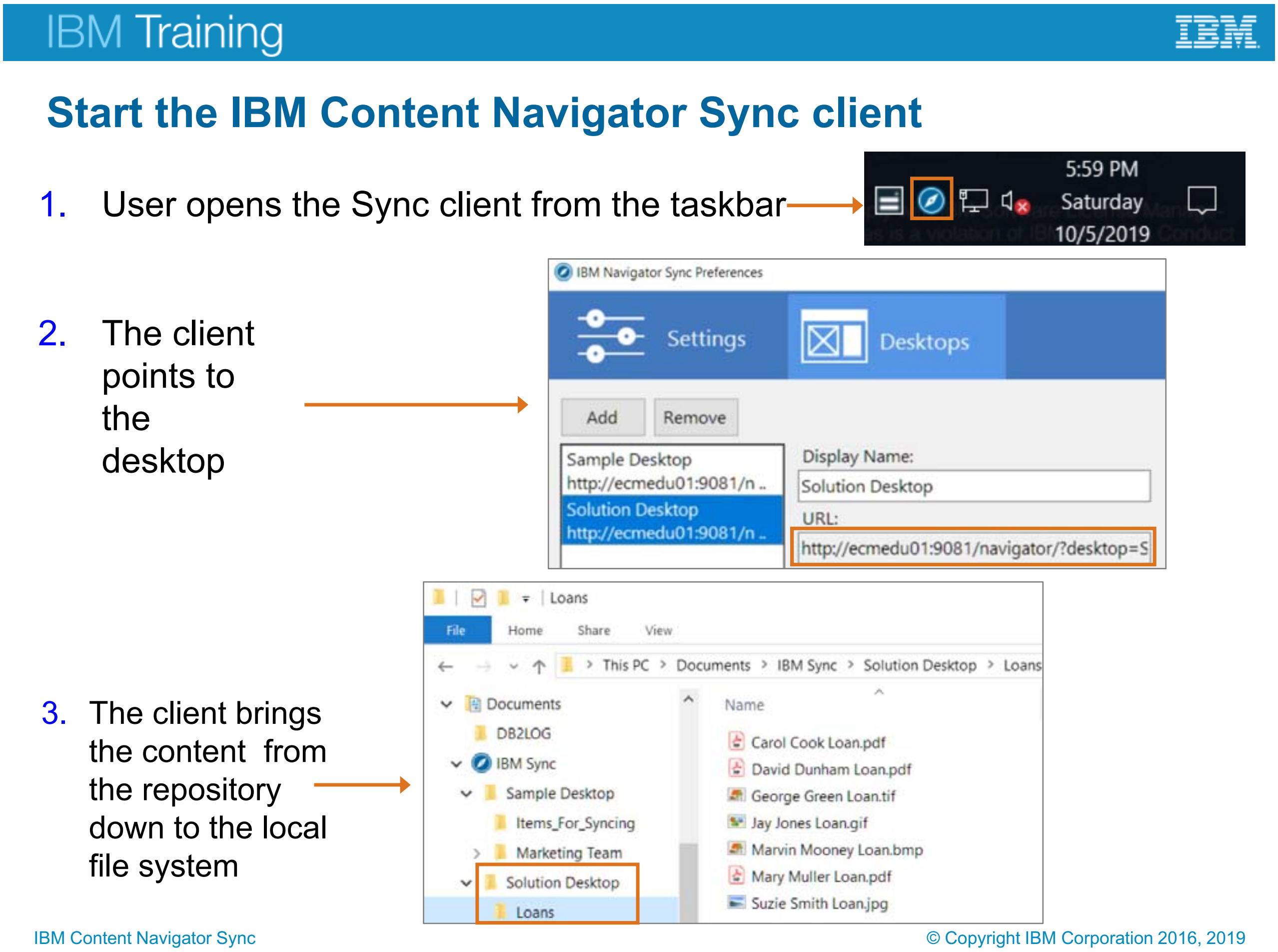


Figure 6-18. Start the IBM Content Navigator Sync client

The screen captures show the following items. From top:

(1) Open the Sync client

(2) Sync client Preferences settings

(3) local sync folder

To open the synced folders, right-click the Sync client icon in the system tray on the taskbar and select Open Sync Folder.

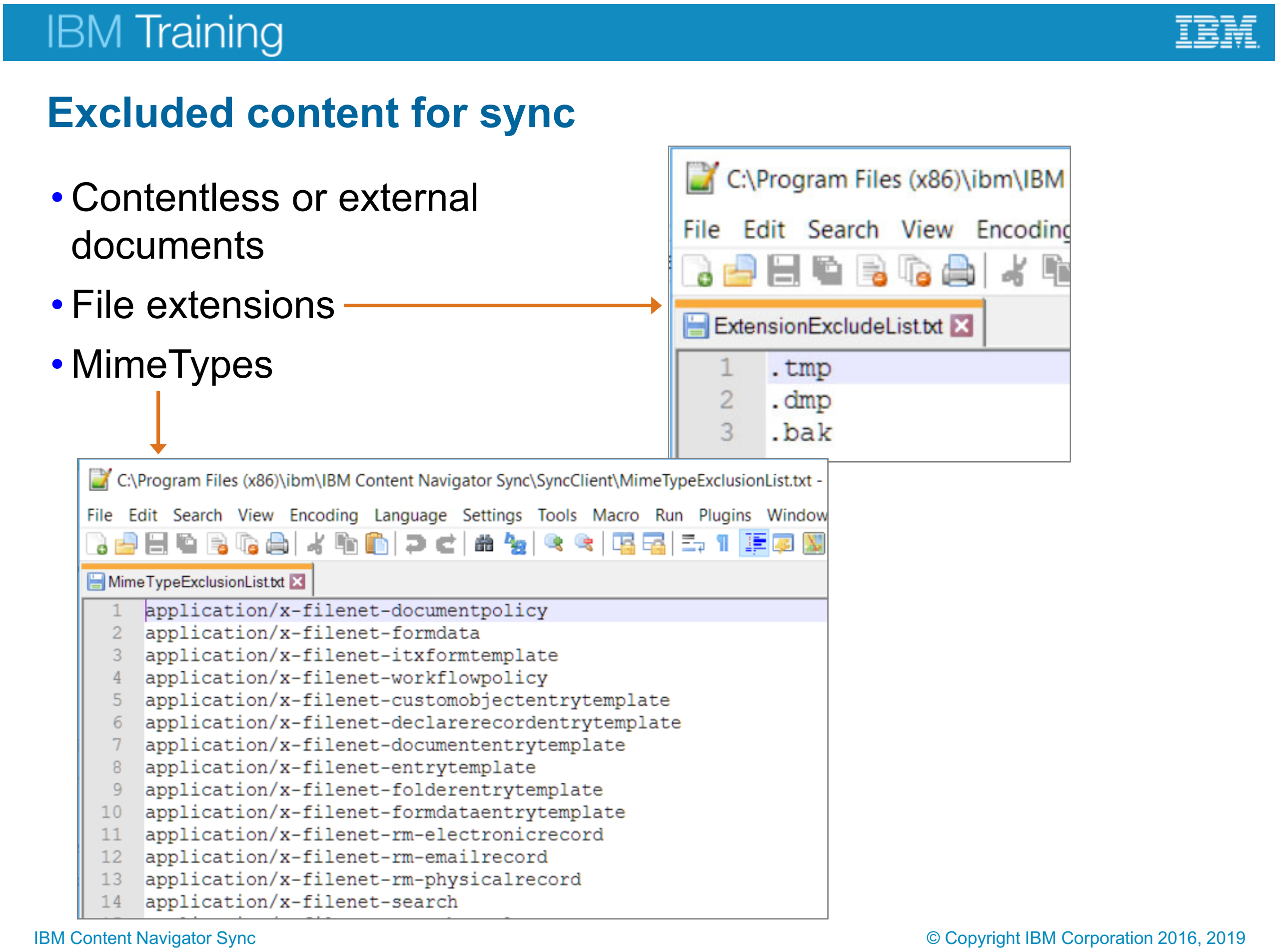


Figure 6-19. Excluded content for sync

The upper screen capture shows the ExtensionExcludeList.txt file and lower screen capture shows the MimeTypeExclusionList.txt file.

The default location of these files on a Windows system: C:\Program Files(x86)\IBM\IBM Content Navigator Sync\SyncClient

Contentless or External documents

- Sync processes contentless and external documents that are in the repository, but does list in the workstation file system.
- If a user checks in a new version with content, copies of the new documents will be added to the workstation file system.

File extensions

The Sync client does not commit any new files to the repository with the file extensions that are listed in the ExtensionExcludeList.txt file.

MimeTypes

The Sync client does not sync any documents with the mime types that are listed in the MimeTypeExclusionList.txt file.

Changing the Exclude list files

- You can change either of the exclude list files.
- You must restart the Sync client for the changes take effect.

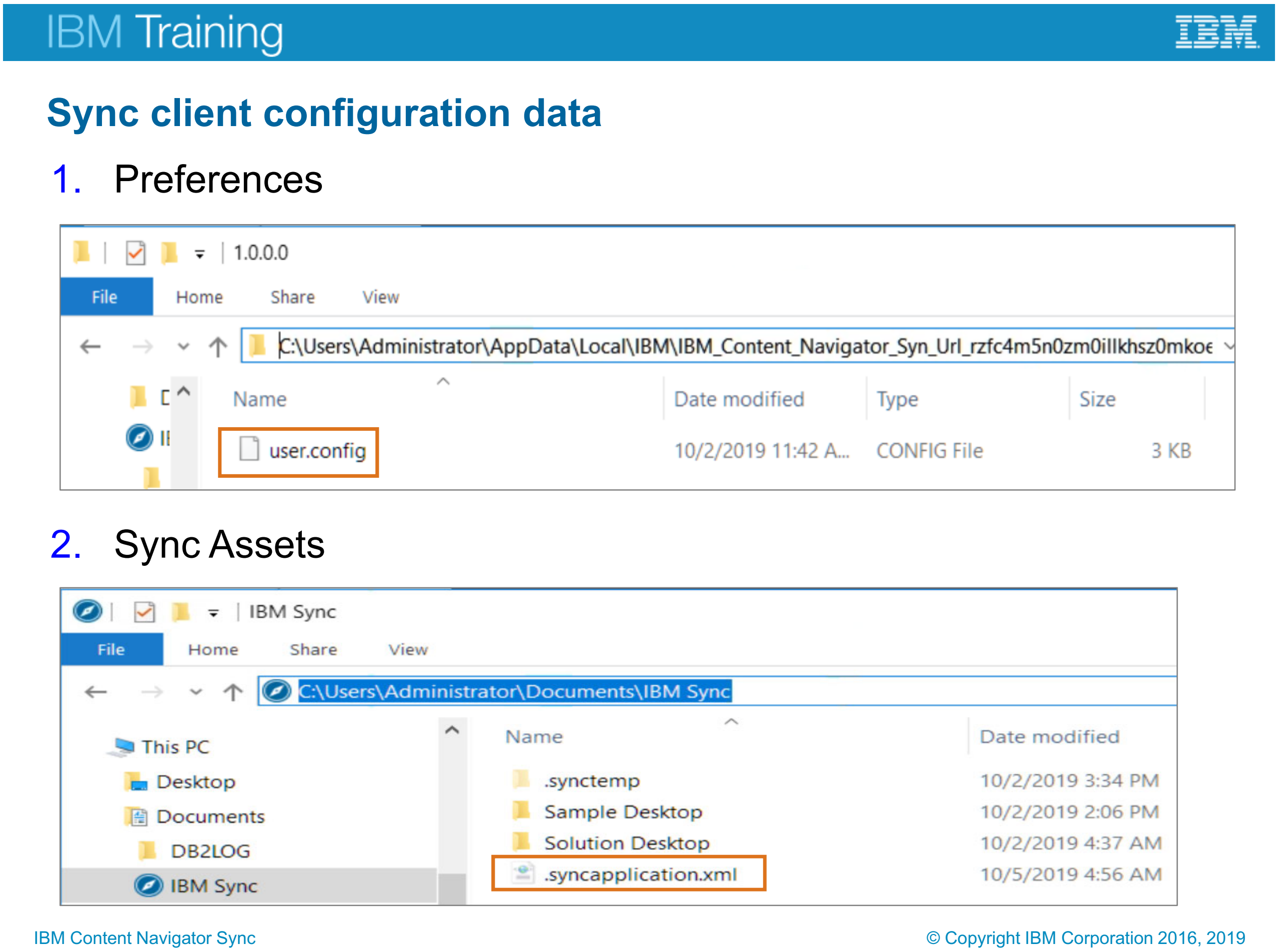


Figure 6-20. Sync client configuration data

The screen captures show the location of the configuration data files for Sync client.

1. Preferences

The user.config file stores the configured desktop information for the user and sync schedule. This hidden file is in the …\AppData\Local\IBM\... folder.

2. Sync Assets

The .syncapplication.xml file contains the information about each synced favorite and which files must be synced. This hidden file is in the IBM Sync folder.

IBM Training

Guidelines to optimize Sync service operations

- Sync optimization depends on many factors:
  - Network performance
  - Volume of files to be synced
  - Size of the files
- Tips
  - Each user syncs no more than 1000 files at a time.
  - Sync periodically.

IBM Content Navigator Sync

Figure 6-21. Guidelines to optimize Sync service operations

Guidelines to optimize sync service operations:

- Sync is not the preferred tool to import or export large batches of documents or do system migrations.
- Use a balanced folder structure that is optimal for your file system. Example: New Technology File System (NTFS) is the optimal file system for Microsoft Windows client computers.
- Sync often but not too often (maintain a balance)

  You want the client to sync periodically to avoid having to sync large change sets because that can take a long time. But syncing too frequently (Example: every minute) can affect the performance of the IBM Content Navigator server.
- Select the unlimited folder depth option for syncing folders with caution
- Trim the Sync database often

  Run the Database Cleanup tool to ensure that the database is rid of objects that are not needed any more. Example: deleted favorites, expired devices.

6.3. Sync content across multiple devices

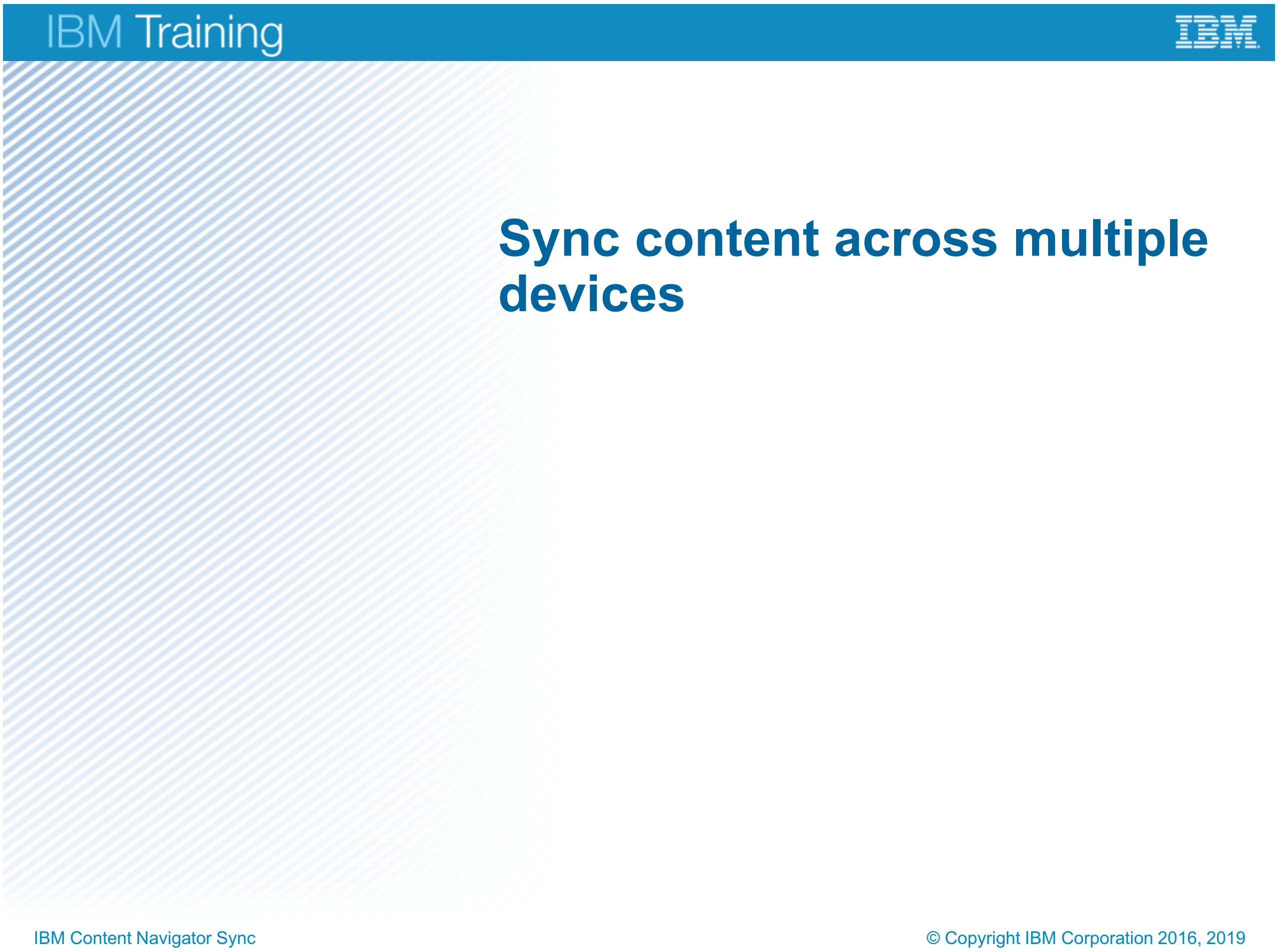


Figure 6-22. Sync content across multiple devices

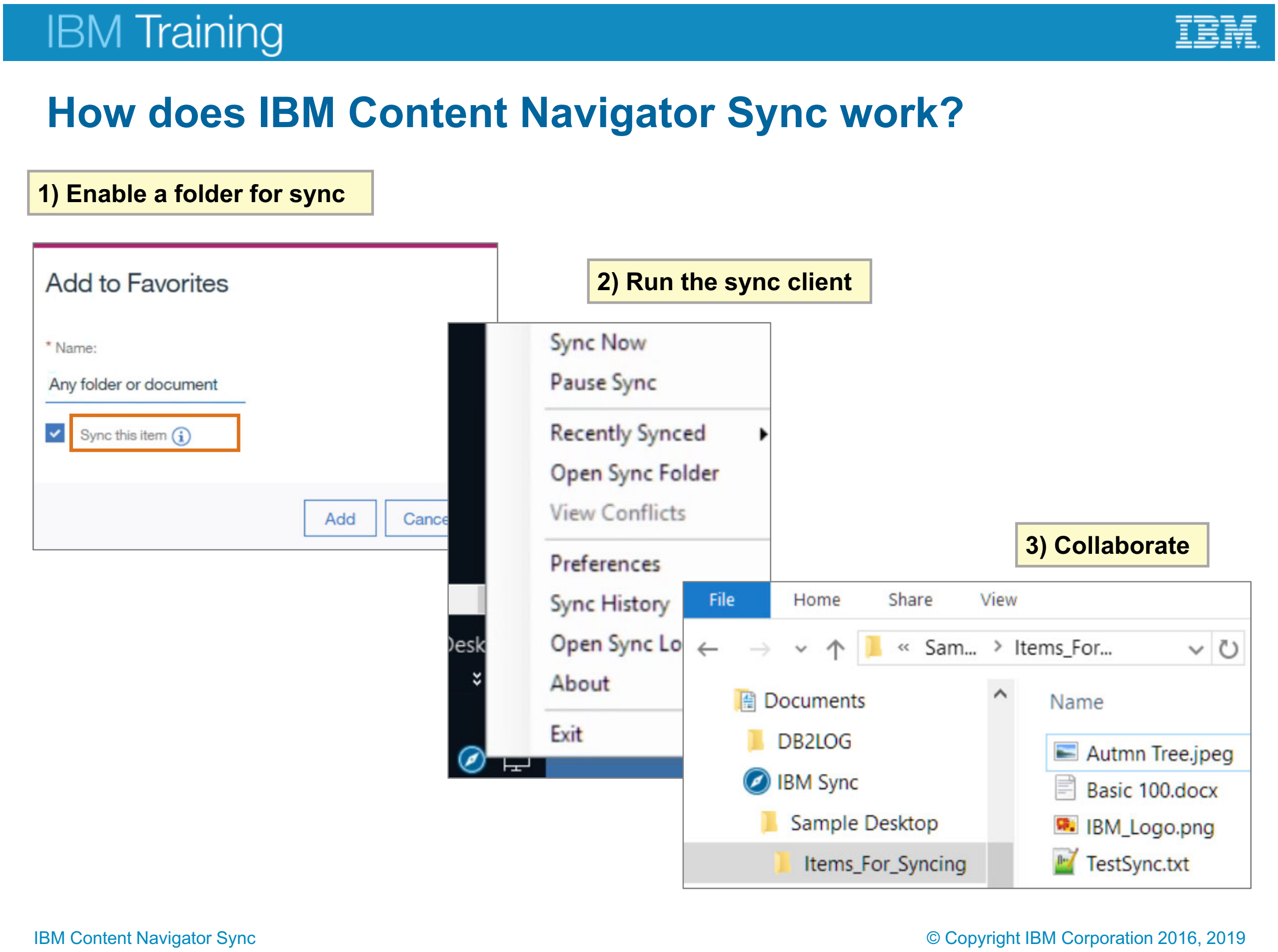


Figure 6-23. How does IBM Content Navigator Sync work?

The chart shows three screen captures.

a. On the left, in the first screen capture, a user selects a repository folder (or a document), enables sync for that folder, and adds the folder to Favorites in the IBM Content Navigator desktop.

   After a folder is enabled for sync, it can be synced on any operating system that is Sync-supported (Example: Windows, Android, or iPhone).

b. In the second one, the user runs the Sync client from the taskbar.

c. The third one shows the local folder in Windows Explorer that is used for sync. The workstation folder has the same documents that are in the repository folder.

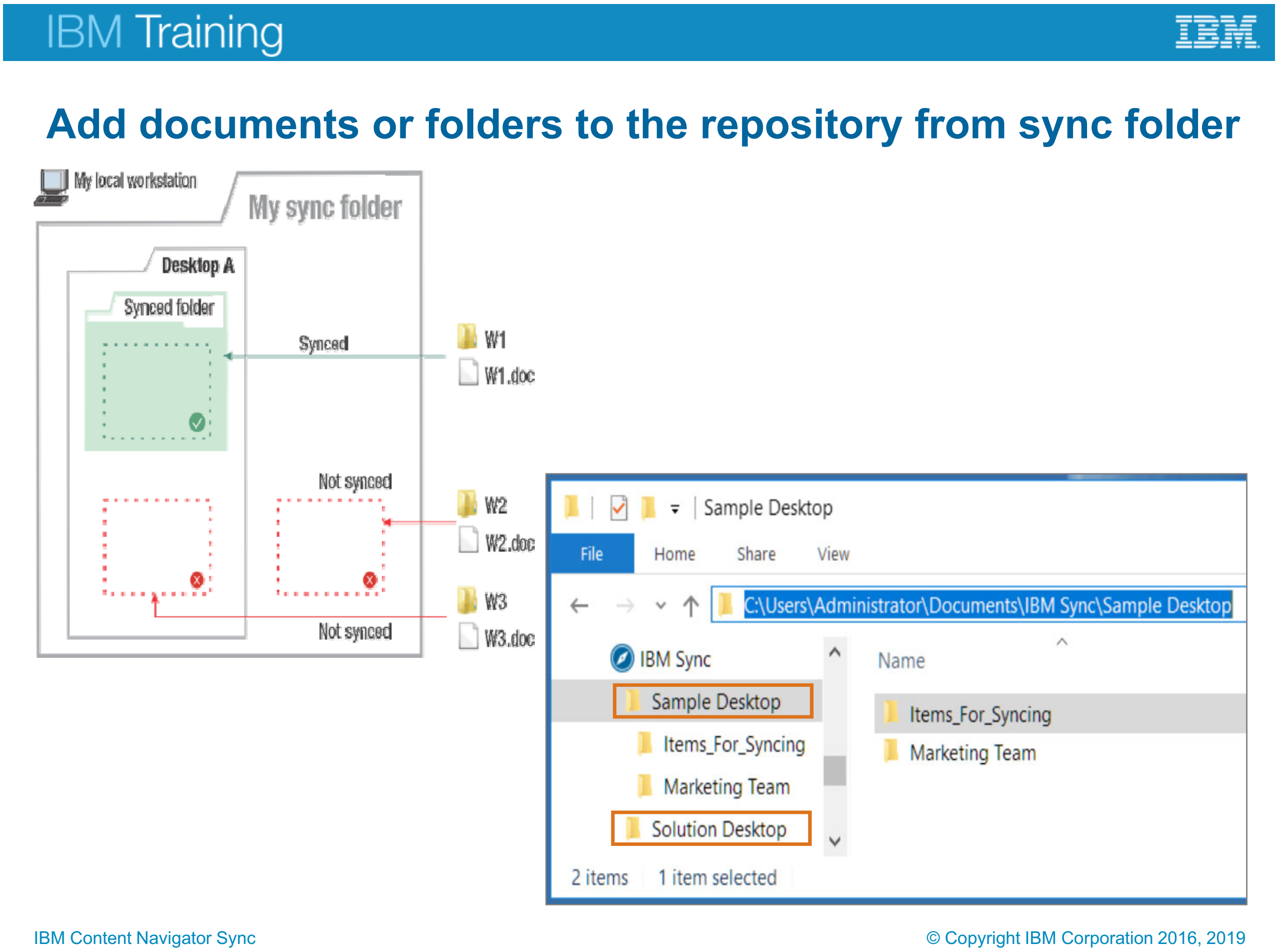


Figure 6-24. Add documents or folders to the repository from sync folder

The diagram on the upper left shows you the instances where you can and cannot drag your content to the sync folder from your local file system.

The screen capture on the lower right shows an example of an actual folder structure for sync on a local directory on your workstation (C:\Users\Administrator\Documents\IBM Sync\Sample Desktop)

When you configure the Sync client, it automatically creates a subfolder for sync called IBM Sync (with a blue symbol) under the C:\Users\Administrator\Documents folder by default.

When you configure each desktop, a folder with the desktop name is created under the IBM Sync folder (in this example, Sample Desktop and Solution Desktop are created).

Within each desktop folder, the sync enabled repository folders (in this example, Items_For_Syncing) and Sync-enabled teamspaces (in this example, Marketing Team) are listed. You must add content to the sync folder or the subfolders inside the teamspace folder.

- Drag the new content from your workstation to a folder (on your desktop) that exists in the repository and is synced to your local folder (shown in green, referred to as W1).

  Example: C:\Users\Administrator\Documents\IBM Sync\Sample Desktop\Items_For_Syncing

- The following items are not added to the repository because IBM Content Navigator Sync does not have context for where to add the new content to the repository.
  - Items that are added to the root level of the sync folder (shown in red, referred to as W2).

    Example: C:\Users\Administrator\Documents\IBM Sync
  - Items that are added to the root level of the desktop (shown in red, referred to as W3).

    Example: C:\Users\Administrator\Documents\IBM Sync\Sample Desktop

    The destination specifies only the level of the desktop. A desktop can be configured with multiple repositories, or can restrict users from adding unfiled documents.
- You can also create a subfolder under the valid sync folder on your local desktop and it is added to the repository.

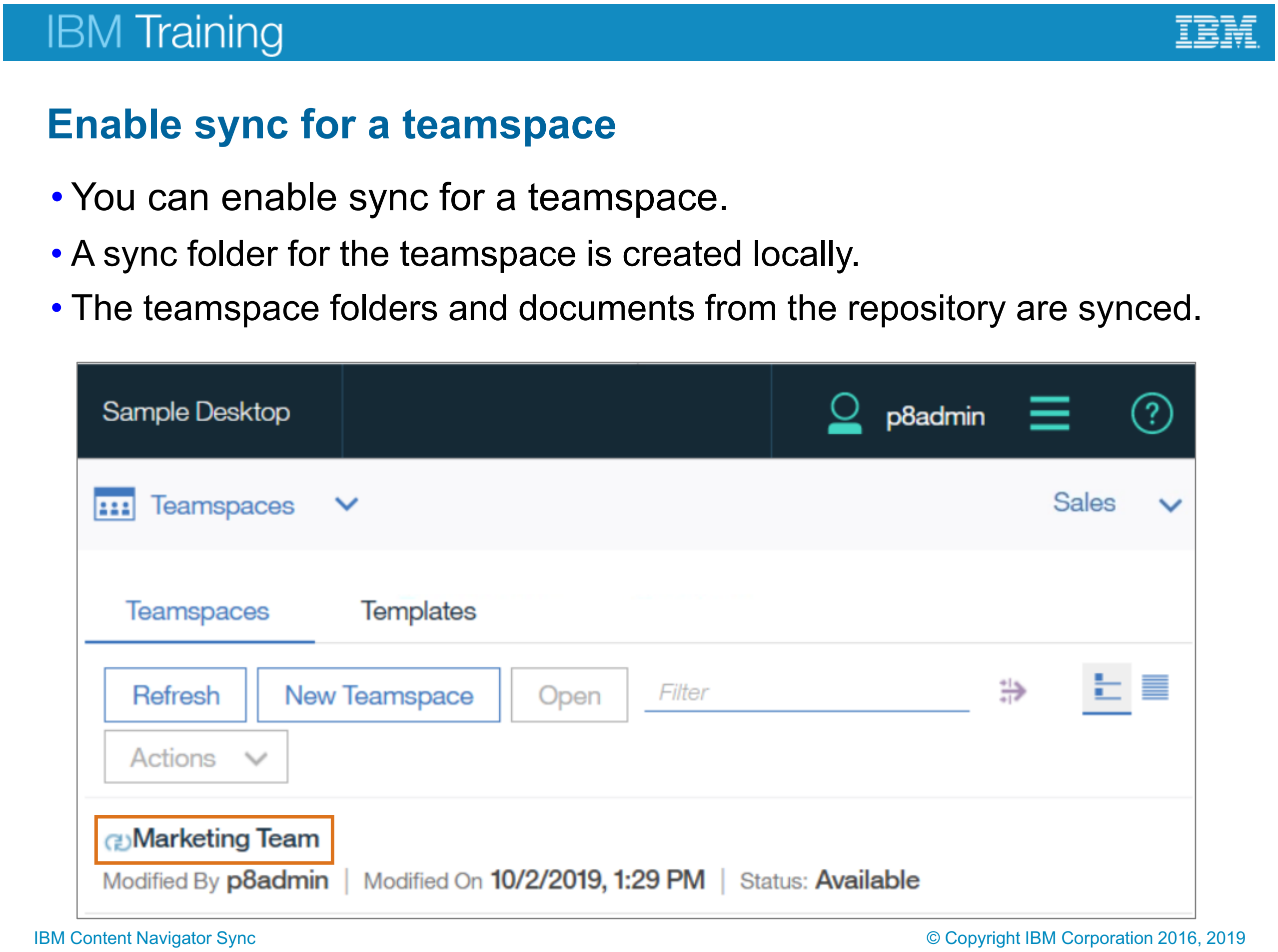


Figure 6-25. Enable sync for a teamspace

The screen capture shows the Teamspaces page > Teamspaces tab.

Note: The teamspace topic is covered in detail in the IBM Content Navigator Configuration unit.

IBM Training

IBM Content Navigator Sync: Conflicts

Conflicts occur when:

- User 1 edits a synced document on the local system offline.
- User 2 edits the corresponding document and checks it into the repository.
- User 1 syncs the document to the repository.

IBM Content Navigator Sync

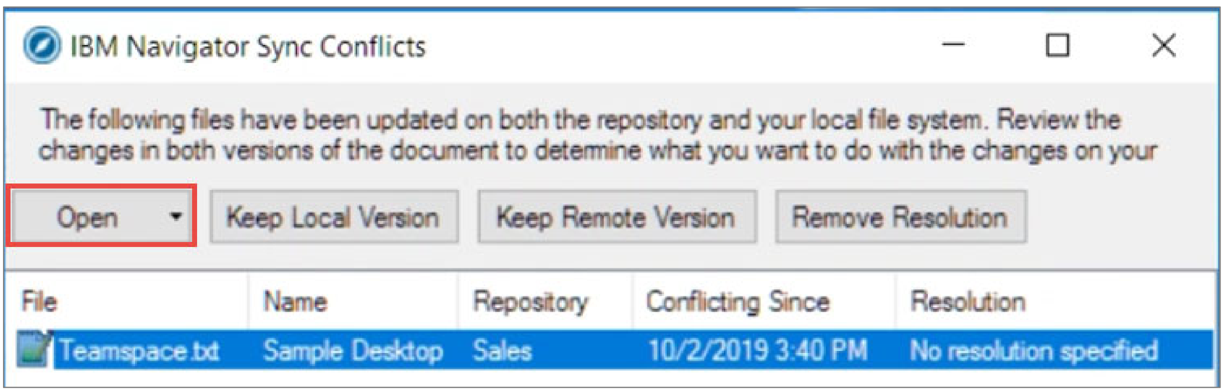
Figure 6-26. IBM Content Navigator Sync: Conflicts

The screen capture shows an IBM Content Navigator Sync conflict message.

IBM Training

IBM Content Navigator Sync: Conflict Resolution

- Open the IBM Navigator Sync Conflicts page.
  - You can open both the repository and local copies of the document to view.
  - After you compare, resolve the conflict by selecting one of the options.



IBM Content Navigator Sync

Figure 6-27. IBM Content Navigator Sync: Conflict Resolution

The screen capture shows the IBM Navigator Sync Conflicts page that is used for conflict resolution.

Conflicts are only version-based. For renaming conflicts, last update wins.

Steps for resolving conflict

1. In the IBM Content Navigator Sync Conflicts page, select the document for which you have a version conflict.
2. Open both the repository and local copies of the document to view.
3. After comparing, resolve the conflict by selecting one of the options:
   - Keep Local Version (Push your own version up to the repository)
   - Keep Remote Version (Discard your changes and accept the version in the repository)

More than one conflict:

In a rare scenario, three users work on the same document.

- User-1 checked in a new document version in the repository (example: version 2)
- User-2 edited the synced file (version 1) in the local directory and receives a conflict. User-2 decides about the conflict and commits the change.

- But in the meantime, User-3 checked in version 3 of the same document.

  The decision of User-2 is invalidated and the Sync client forces the user to decide for the second conflict (caused by User-3).

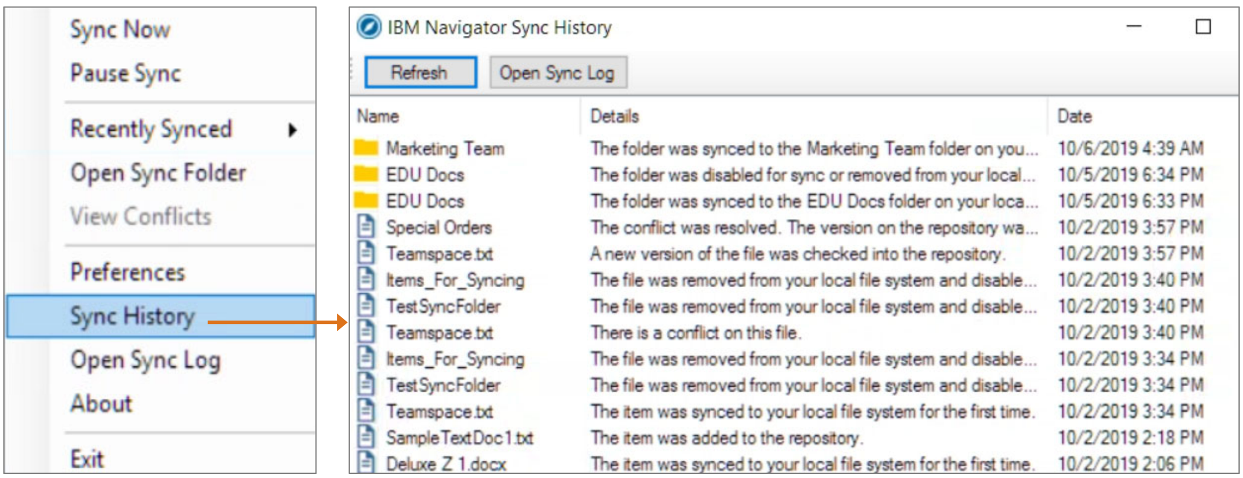
  The user is forced to decide for every new conflict. The decision that is made for one conflict is not applicable to the next one for the same document.

  If a new version of the document is found in the repository by the time the user decides on the existing conflict and commits the change, the decision is invalidated. The Sync client forces the user to decide based on the new version conflict.

IBM Training

Sync history

- Sync History lists the sync activity.



IBM Content Navigator Sync

Figure 6-28. Sync history

The screen capture shows the Sync History page that lists the sync activity.

Example scenario: If the user is not seeing all the folders that are available, it might be because the application is configured to restrict syncing based on the folder depth. This information is reported in Sync History.

IBM Training

Unit summary

- Describe the IBM Content Navigator Sync feature
- Configure IBM Navigator Sync
- Sync content across multiple devices
- Resolve sync conflicts

IBM Content Navigator Sync

Figure 6-29. Unit summary

IBM Training

Review questions

1. True or False: With the IBM Content Navigator Sync feature, you can sync the updated content across multiple devices.

2. Which of the following components can be enabled for syncing? (Select all that apply)
   A. Teamspaces
   B. Folders
   C. Saved searches
   D. Documents
   E. Entry templates

3. True or False: When you use the Sync feature on your device, you must manually check out a document for editing and check in the updated document to the repository.

IBM Content Navigator Sync

Figure 6-30. Review questions

Write your answers here:

1.

2.

3.

IBM Training

Review answers

1. True or False: With the IBM Content Navigator Sync feature, you can sync the updated content across multiple devices.
   The answer is True.

2. Which of the following components can be enabled for syncing? (Select all that apply)
   A. Teamspaces
   B. Folders
   C. Saved searches
   D. Documents
   E. Entry templates
   The answer is A, B, and D.

1. True or False: When you use the Sync feature on your device, you must manually check out a document for editing and check in the updated document to the repository.
   The answer is False. With Sync, the check out and check in are automatic.

IBM Content Navigator Sync

Figure 6-31. Review answers

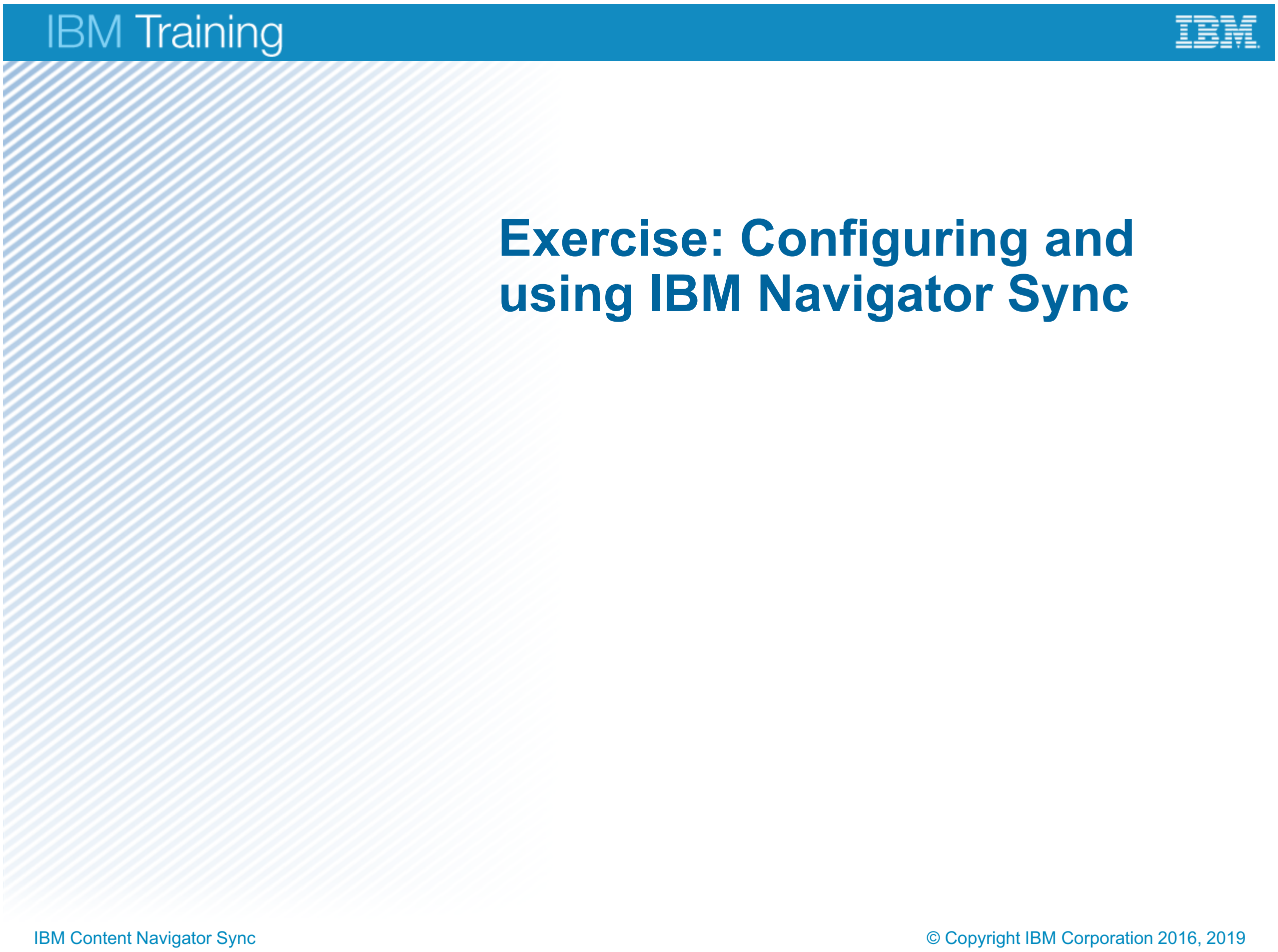


Figure 6-32. Exercise: Configuring and using IBM Navigator Sync

IBM Training

Exercise objectives

- Configure IBM Content Navigator Sync services and Sync client
- Enable sync for a desktop, a repository, and folders
- Sync content across multiple devices
- Resolve sync conflicts

IBM Content Navigator Sync

Figure 6-33. Exercise objectives

Unit 7. IBM Content Navigator Edit Service

Estimated time

01:00

Overview

This unit teaches you how to configure the Edit Service client and use it to edit the documents in their native applications.

How you will check your progress

- Review
- Exercise

References

https://www.ibm.com/support/knowledgecenter/SSEUEX_3.0.6/com.ibm.installingeuc.doc/eucco154.htm

IBM Training

Unit objectives

- Describe the use of IBM Content Navigator Edit service
- Configure the Edit Service client
- Use the Edit Service client to edit repository documents

Figure 7-1. Unit objectives

IBM Training

Topics

- What is IBM Content Navigator Edit service?
- Configure Edit service
- Use Edit service

IBM Content Navigator Edit Service

Figure 7-2. Topics

7.1. What is IBM Content Navigator Edit service?

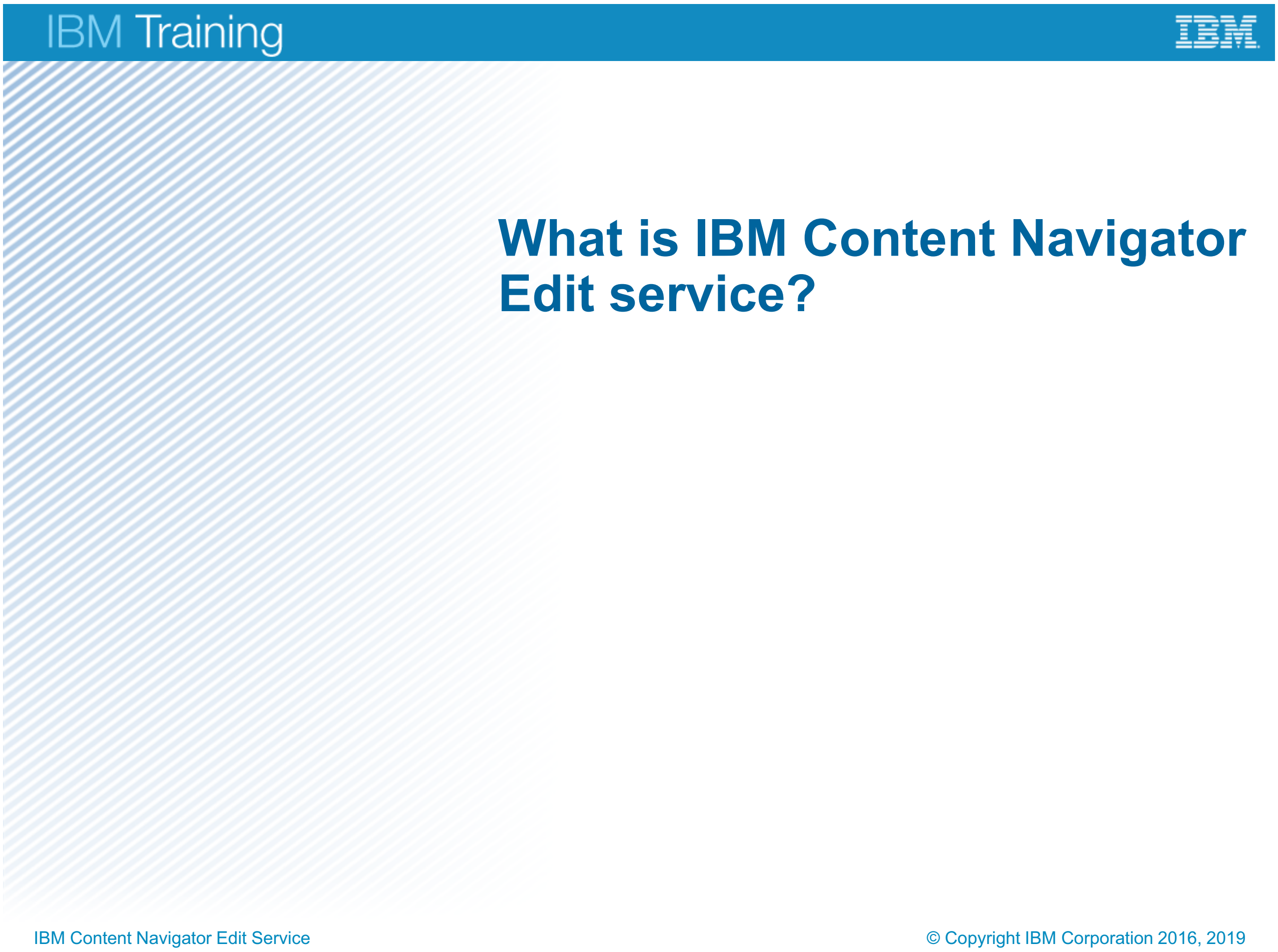


Figure 7-3. What is IBM Content Navigator Edit service?

IBM Training

IBM Content Navigator Edit service

- Use the Edit service to add or edit files in IBM FileNet Content Manager repositories using desktop applications.
- Configure the Edit service on the IBM Content Navigator server and install the Edit service client on the users' workstations.
- By default, the Edit service includes support for Microsoft Office documents.
  - You can configure the edit service to support PDF, HTML, and other files.
  - The Edit service can be configured to work with any desktop application.

IBM Content Navigator Edit Service

Figure 7-4. IBM Content Navigator Edit service

The Edit service launches the desktop applications from within the browser and allows the end user to edit documents without having to download the documents to their workstation first.

Likewise, using the Edit Service, users can create new documents from within Content Navigator; they don’t need to launch the application manually, and then upload the document to the repository.

7.2. Configure Edit service

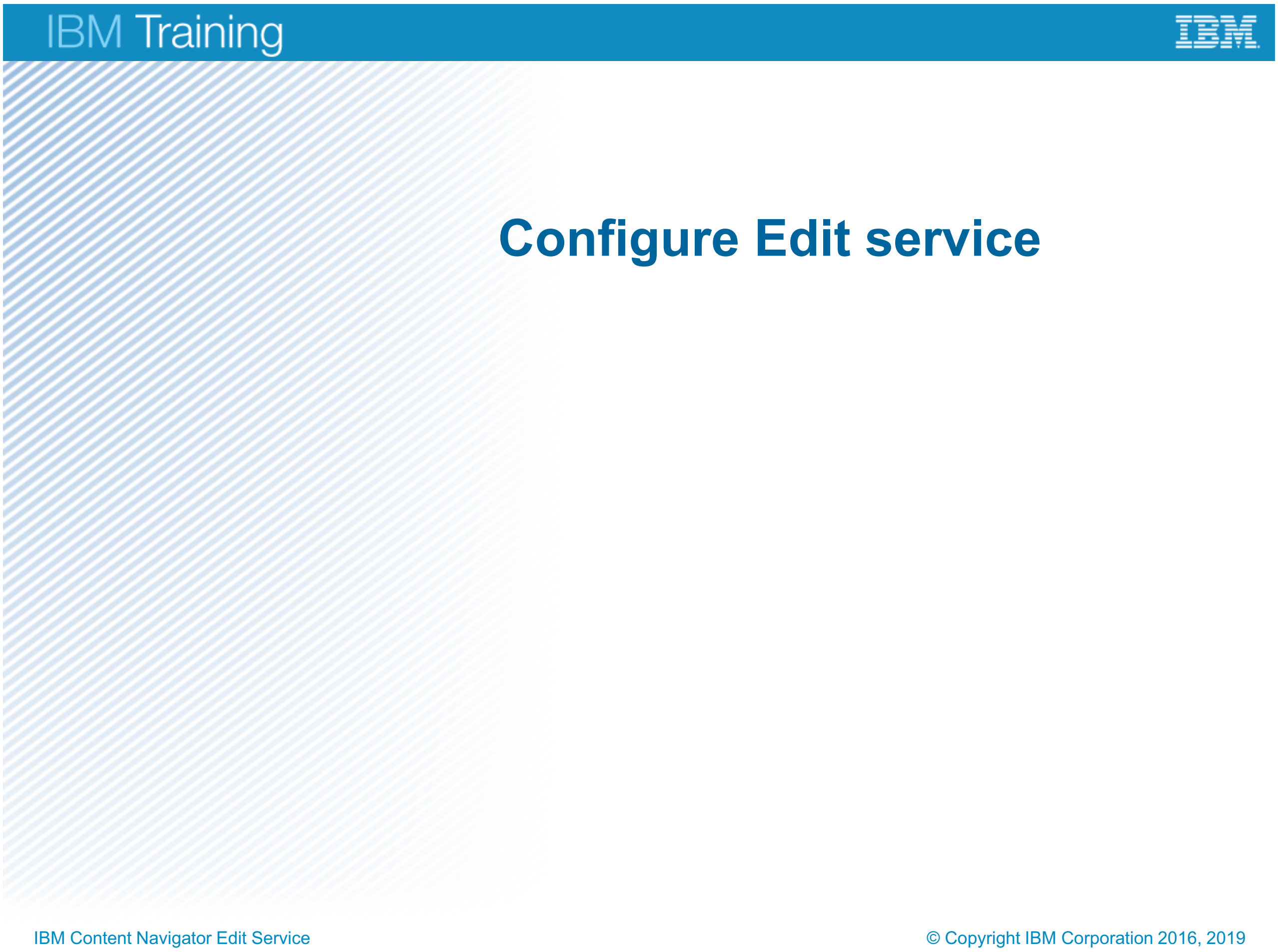


Figure 7-5. Configure Edit service

IBM Training

Enable Edit service

The steps for enabling the Edit service at a high-level are:

- Enable desktop
- Enable repository
  - Supports IBM FileNet Content Manager (P8) and IBM Content Manager (CM8) repositories
- Create custom templates and categories
  - IBM Content Navigator provides default categories and templates.
- Install the Edit client on the user workstations
  - Supported on both Windows and Mac operating systems

IBM Content Navigator Edit Service

Figure 7-6. Enable Edit service

In the IBM Content Navigator administration desktop, enable the repository and desktop edit service configurations for the edit service actions to become available.

The Edit Service client is supported on both Windows and Mac operating systems. Windows 7 is not supported.

The IBM Content Navigator client communicates with the edit service through localhost.ibm.net, a global domain name server that points to 127.0.0.1.

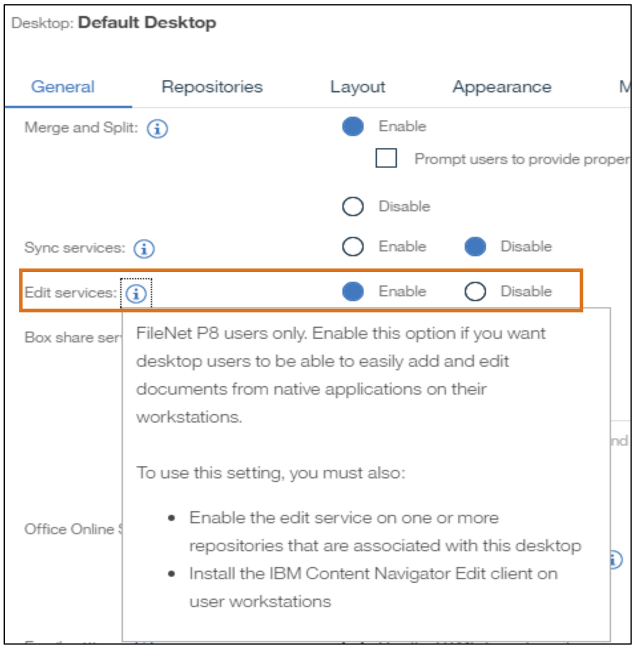
If your network cannot access the internet, you must take one of the following actions to enable the web client to communicate with the edit service:

- Configure your own DNS server with point localhost.ibm.net to 127.0.0.1
- Configure the hosts file on each client workstation to include the following entry:127.0.0.1 localhost.ibm.net

IBM Training

Configure desktop for Edit services

- Enable Edit services in desktop configuration General tab.



IBM Content Navigator Edit Service

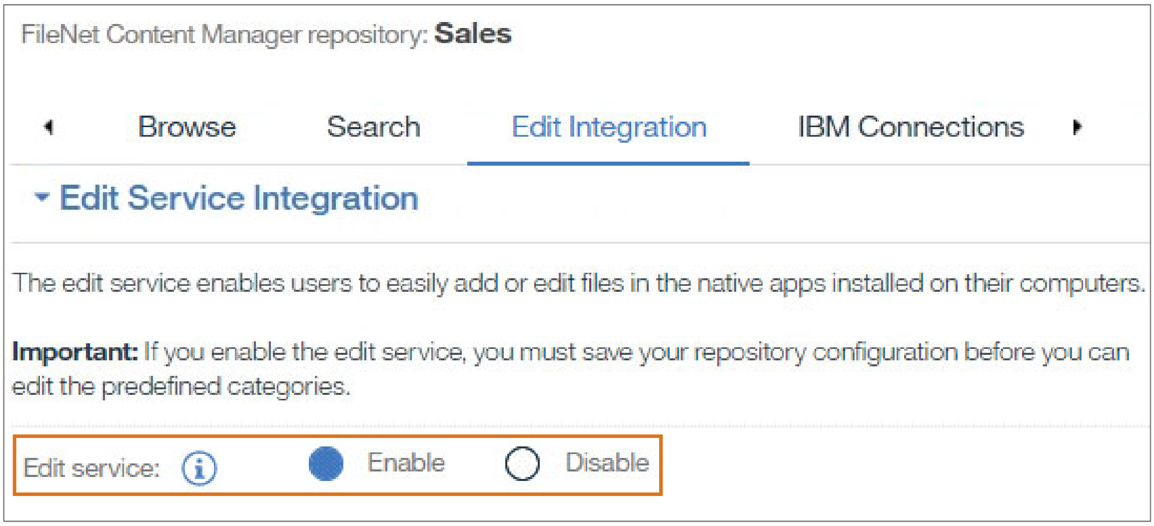
Figure 7-7. Configure desktop for Edit services

The screen capture shows you the desktop configuration General tab and the enable option for the Edit services.

IBM Training

Configure a repository for Edit service

- Enable Edit service in the repository configuration Edit Integration tab.



IBM Content Navigator Edit Service

Figure 7-8. Configure a repository for Edit service

The screen capture shows you the repository configuration Edit Integration tab. The Edit service is enabled.

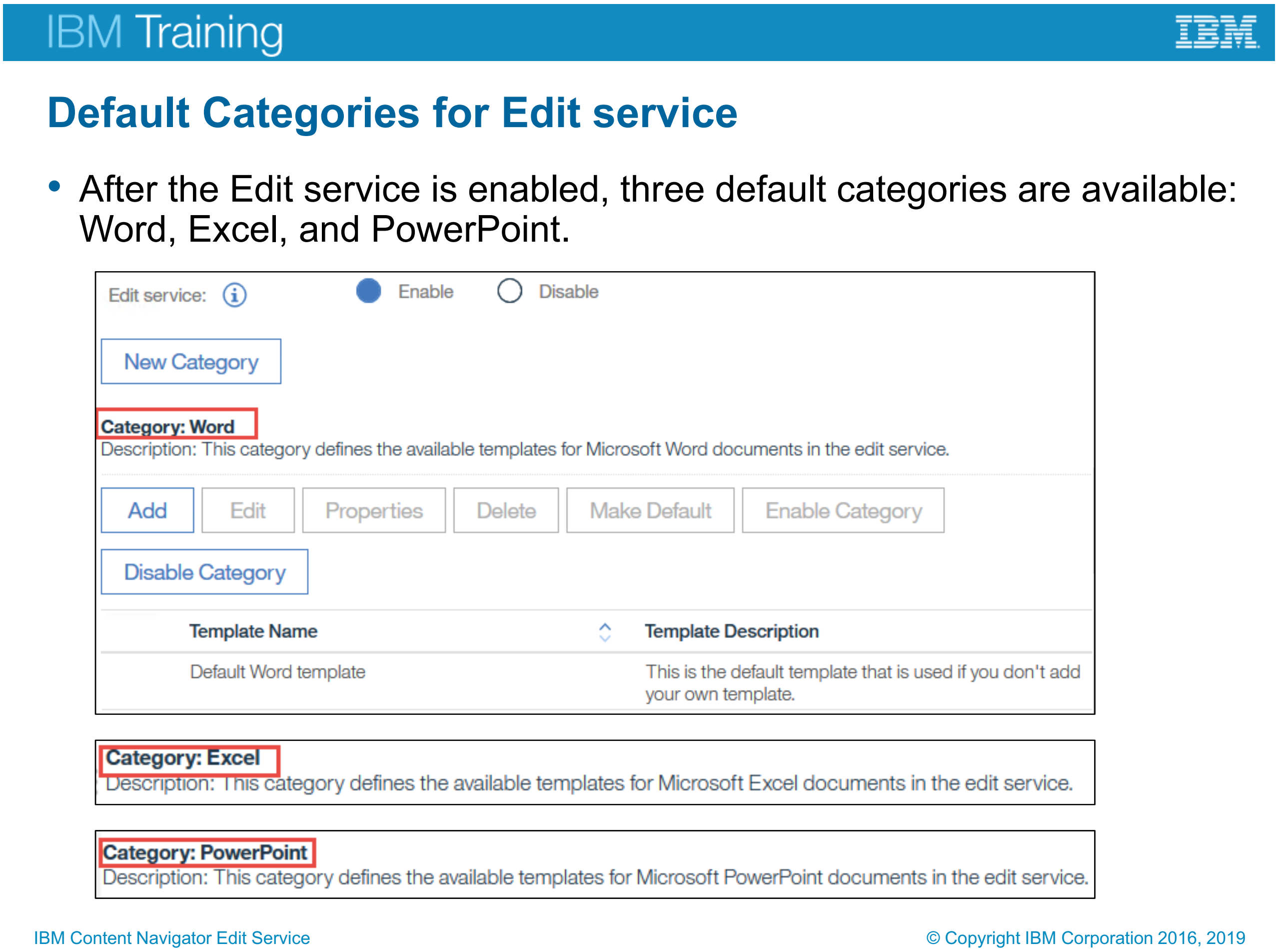


Figure 7-9. Default Categories for Edit service

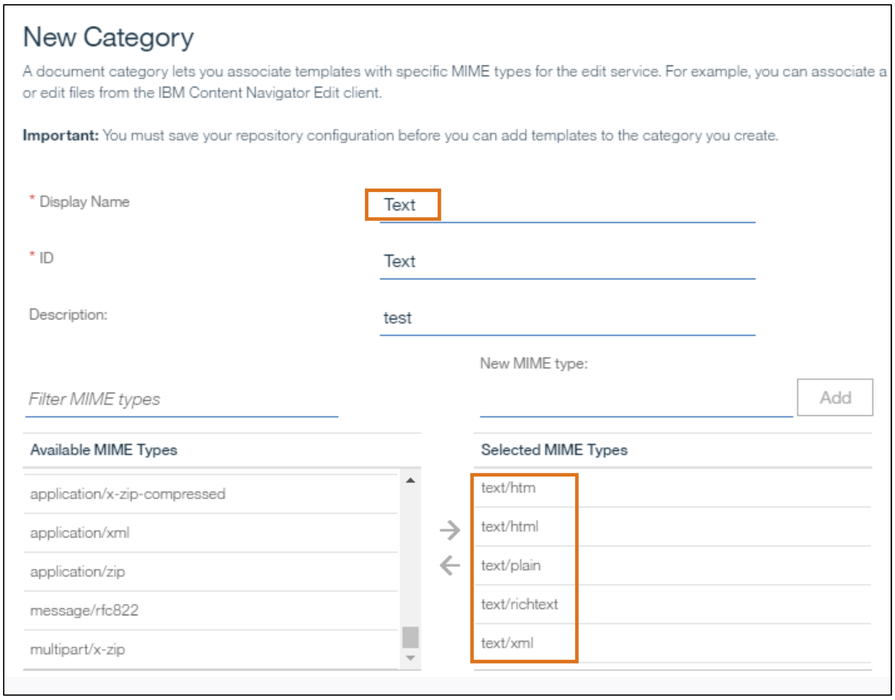
The screen capture shows the default categories that are available for Edit service.

- A category defines the MIME type for the documents and the templates that are associated with it.
- Users can use the categories directly with the default templates. The default templates are blank.
- You can create your own templates for these categories.
- Administrators cannot edit or delete default categories. They can disable or enable them.

IBM Training

Create custom categories for Edit service

- Users can create custom categories with specific MIME types.



IBM Content Navigator Edit Service

Figure 7-10. Create custom categories for Edit service

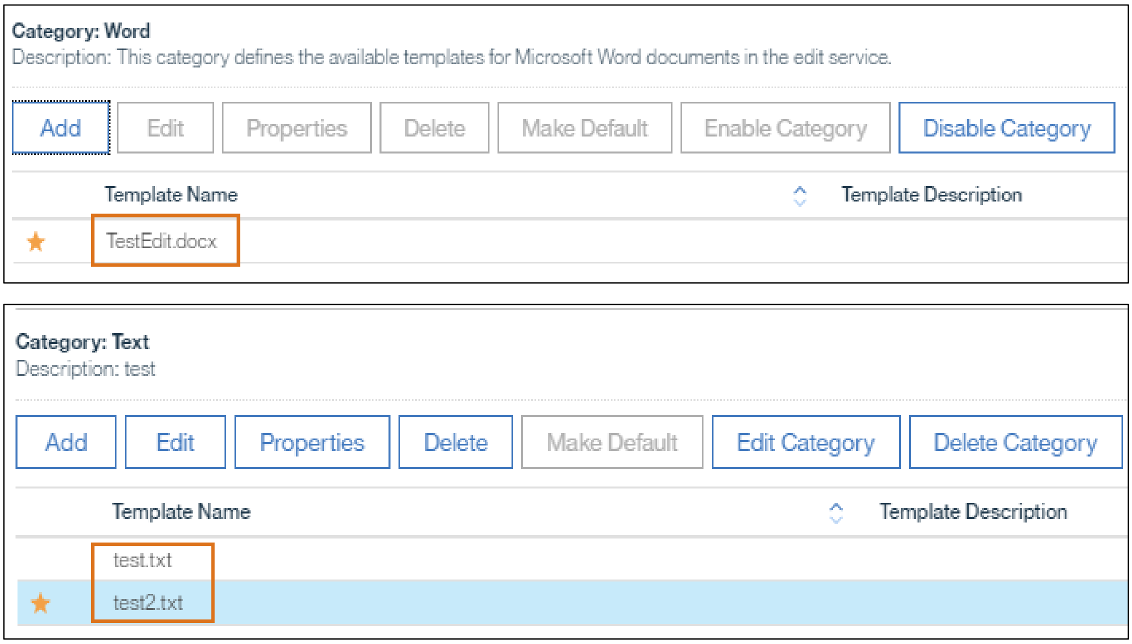
The screen capture shows the New Category page for Edit service. You can associate specific MIME types to your category (Move them from the Available to Selected MIME Types pane).

Administrators can edit and delete the customized categories. If you delete a category, all the templates in the category are also deleted.

IBM Training

Add templates for your custom category

- After you save the configuration, you can add templates to the new categories.



IBM Content Navigator Edit Service

Figure 7-11. Add templates for your custom category

The screen captures show the templates that are added to the default categories (Word) and a custom category (Text). If you have more than one template, you can set a template as the default. The default template has an orange star icon.

Administrators can add, edit, show properties, delete, and make default templates for categories.

Default Category: A default category (Example Word) has a blank default template. After administrators add other templates, the default template will not be shown. When all other templates are deleted, the default template is listed.

Customized Category: There is no default template. Administrators need to add templates for the users to work with that category.

If you created a custom category or if you want to associate a custom template with a default category, you must add one or more templates to each category.

Templates:

- A template is a document in the repository.
- The default template is auto-selected when a user creates a new document of that category.
- A category can have only one default template.
- When you create templates for a category, the mime type must match the category definition, or an error message is shown.
- The users must have permission to read the template's properties and content.

For more information on the templates, refer to the IBM Content Navigator IBM Knowledge Center: https://www.ibm.com/support/knowledgecenter/SSEUEX_3.0.6/com.ibm.installingeuc.doc/eucco154.htm

7.3. Use Edit Service

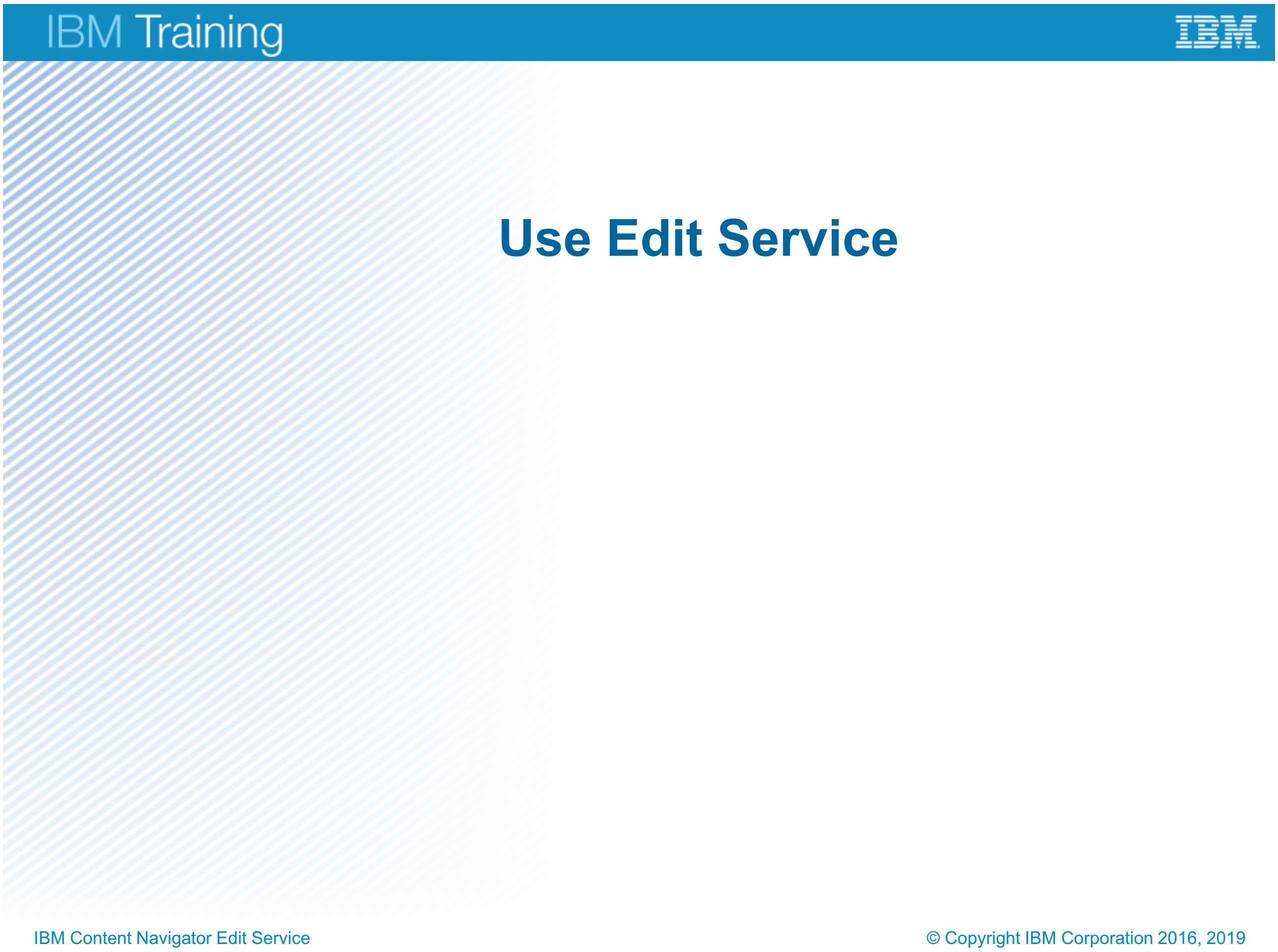
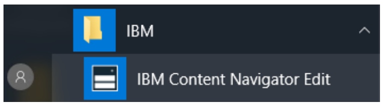


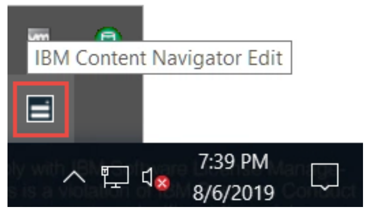
Figure 7-12. Use Edit Service

IBM Training

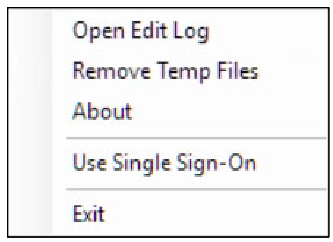
Edit client

- Edit client starts with Windows startup
  - Shows as an icon in the system tray





- Edit client actions:
  - Open Edit log
  - Remove Temp Files
  - About
  - Use Single Sign-On
  - Exit



IBM Content Navigator Edit Service

Figure 7-13. Edit client

The upper left screen capture shows the Edit client on the menu. The upper right screen capture shows the Edit client icon in the system tray. The lower screen capture shows a list of actions that are available for the Edit client.

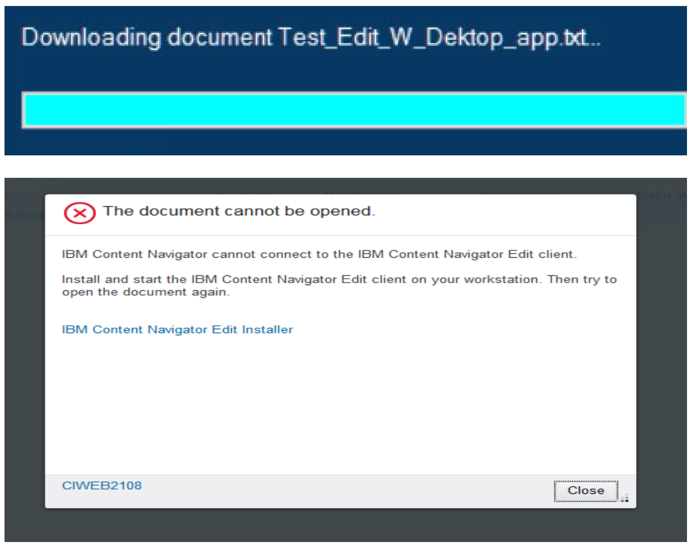
Edit client actions:

- Open Edit log: opens the log.
- Remove Temp Files: deletes all files in the temp directory that the Edit client uses.
- About: displays client version information.
- Use Single Sign-On
- Exit: exits the client.

IBM Training

Edit documents in IBM Content Navigator

- When you use the Edit service in ICN, if the Edit client is not detected on your workstation, you get an error message with a link to download the Edit client installer.
- The Edit client downloads the latest version of the requested document.



IBM Content Navigator Edit Service

Figure 7-14. Edit documents in IBM Content Navigator

If the Edit client is not installed or not detected, an error message is shown.

There is a link in the message box to download the Edit installer directly from IBM Content Navigator.

Edit installer is added to the IBM Content Navigator web root context.

If the Edit client is started, the document is downloaded to the user client and opened by the Windows application that is associated with the file type.

The Edit client always opens the latest version of the requested document.

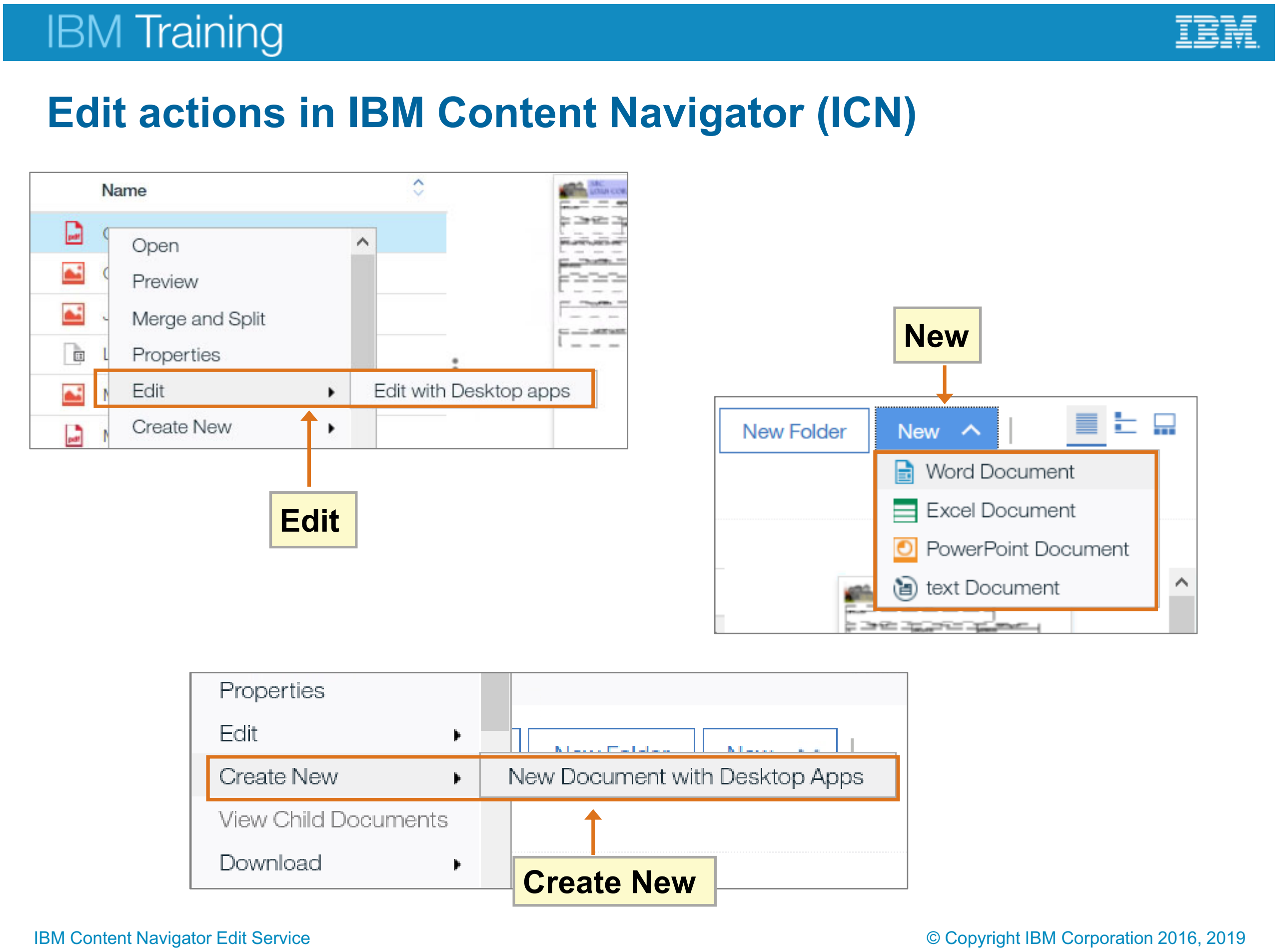


Figure 7-15. Edit actions in IBM Content Navigator (ICN)

The screen captures show the actions that are available for the Edit service.

Edit actions in IBM Content Navigator:

- The Edit > Edit with Desktop apps action is listed in the document context menu.

  Users can edit the document and save the changes (check in).

- The New action is shown in the toolbar and the folder context menu.

  It opens a document with the selected category and template, directly in the desktop app.

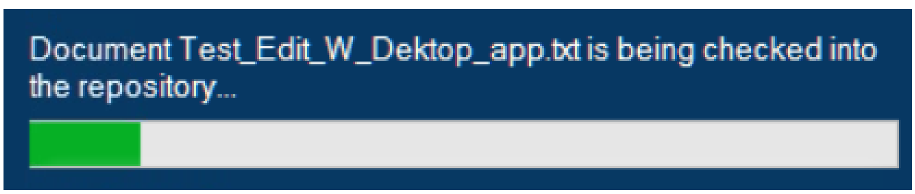
- The Create New > New Document with Desktop Apps action is shown in the document context menu.

  Creates a document with the selected MIME type, and opens the new document directly in the desktop app.

IBM Training

Save and check in changes

- If a document is changed:
  - Edit service checks out the document.
- If the document is changed and saved:
  - Edit service checks in the updated document
- If the current edited version is the released version:
  - Edit service checks in as a major version
- If the save failed because of a network issue:
  - The Edit client keeps retrying to check in the document when the server becomes available
- If a new version is generated by another user, when a document is edited in the client:
  - the Edit client tries to resolve the conflict.



IBM Content Navigator Edit Service

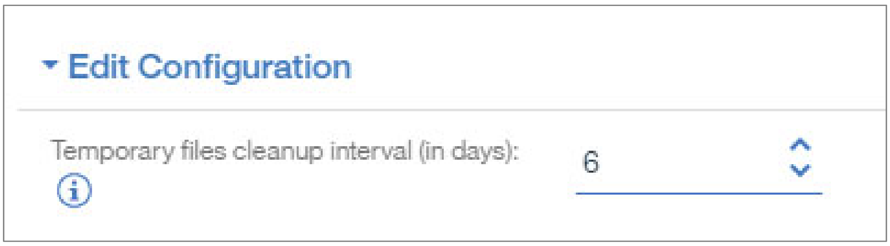
Figure 7-16. Save and check in changes

- If the user exits the application that was used to open the document without making any changes, nothing happens.
- If the document is changed and saved:
  - The application locks the file, like all Microsoft applications. The changes are saved into a reservation version. And the document is checked in when the application exits.
  - If the application does not lock the file (for example Notepad++), then changes are checked in as a new version each time the user saves the document. Then, immediately checked back out again.
- When the current edited version is the released version, then it checks in as a major version.
- When the current edited version is a minor version, then it checks in as a minor version.
- If the save failed because of a network issue, the client keeps retrying but with longer and longer intervals. When IBM Content Navigator is accessible again or the same document is edited again, the modified file is saved and checked into the repository then.
- Edit checks out the document. But if a new version is generated by another user, the Edit client tries to check out, save, and check in.

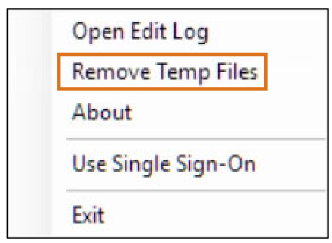
IBM Training

Edit client temporary files clean up

- The temp files are cleaned up automatically based on an interval setting in the IBM Content Navigator administration Settings.



- The users can clean up temp files manually by using the Remove Temp Files action in the Edit Service client.



IBM Content Navigator Edit Service

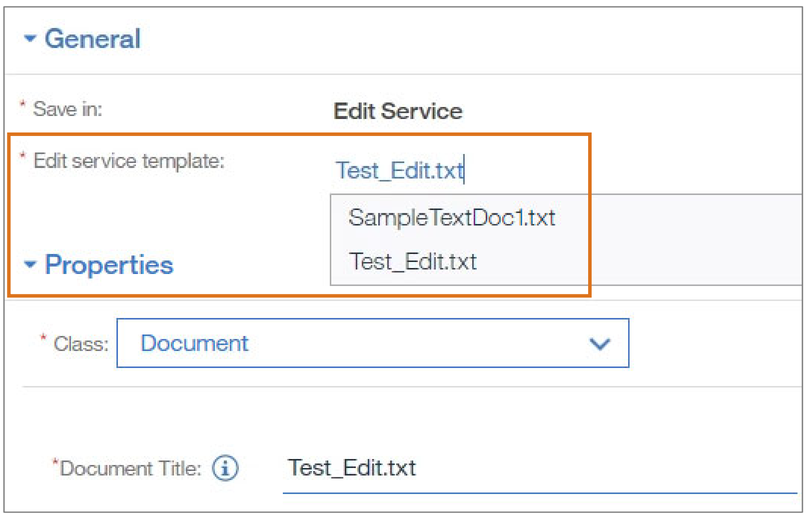
Figure 7-17. Edit client temporary files clean up

The upper screen capture shows the Edit Configuration settings in the IBM Content Navigator administration Settings. The lower screen capture shows the Remove Temp Files action in the Edit Service client.

IBM Training

Add documents

- The user can add documents from the toolbar or folder context menu.
  - You can select a template from the list of available templates.
- If the Edit client is started, the document is downloaded and opened in the desktop application.
  - The user can continue to modify it.



IBM Content Navigator Edit Service

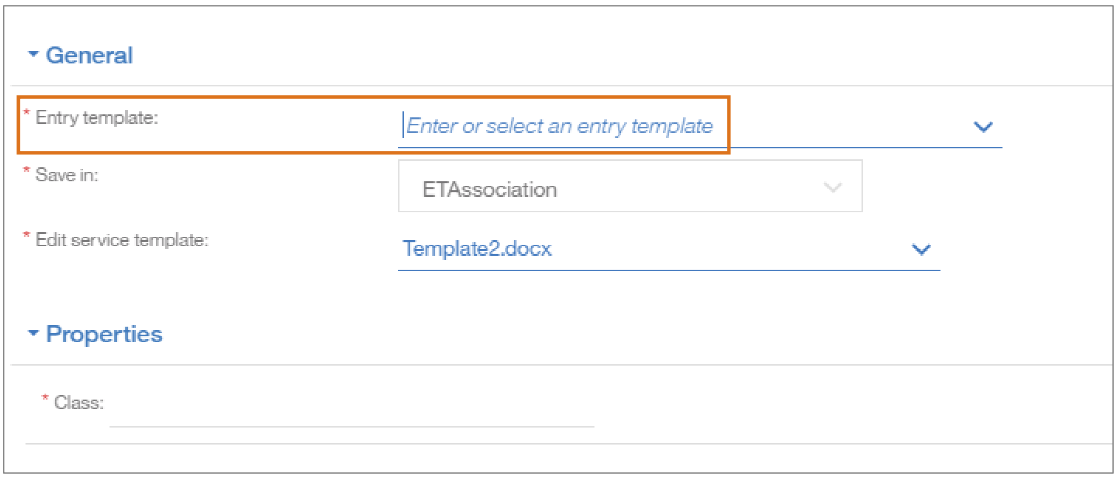
Figure 7-18. Add documents

The screen capture shows the New document page. A list of available templates is highlighted.

IBM Training

Add documents with folder associated entry templates

- If the folder is associated with an entry template, you can use the entry template to add the documents.
- The Save in field can be set based on the entry template association settings.



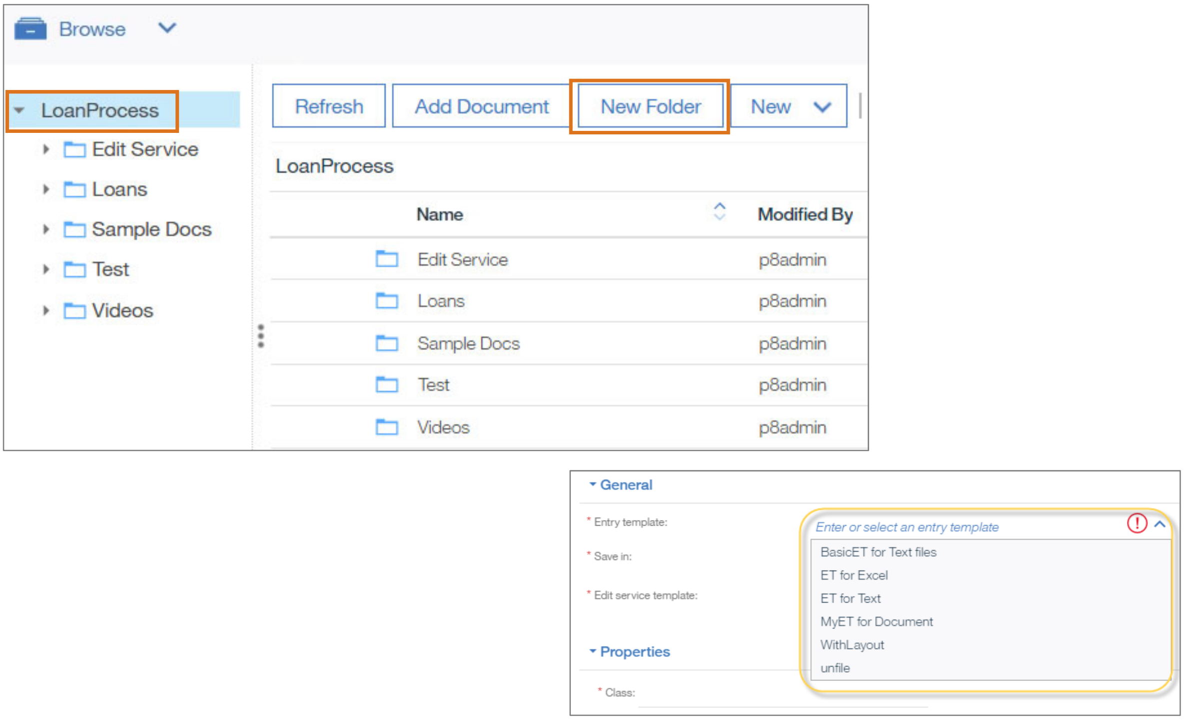
IBM Content Navigator Edit Service

Figure 7-19. Add documents with folder associated entry templates

The screen capture shows the entry template selection when you use the entry template (that is associated with a folder) to add documents with Edit service.

IBM Training

Add documents with document entry templates



IBM Content Navigator Edit Service

Figure 7-20. Add documents with document entry templates

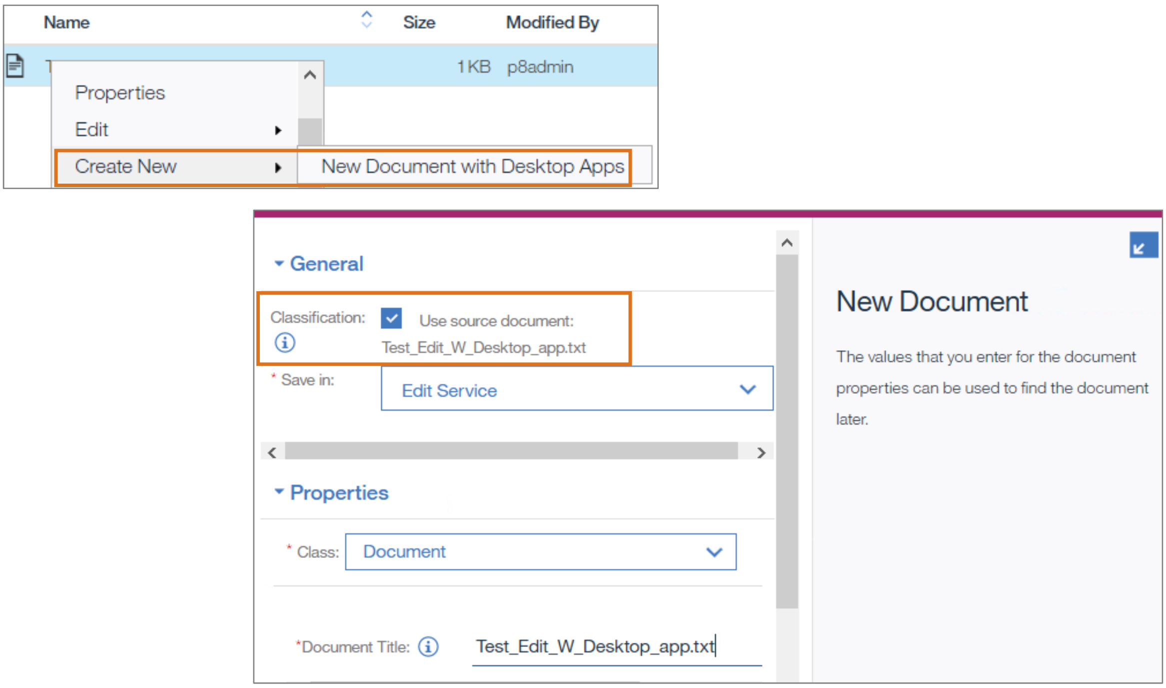
The upper screen capture shows the Browse page. The root in the browse tree and the New action on the toolbar are selected. The lower screen capture shows a list of entry templates that are available for the repository.

You can use the document entry templates to add the documents. Since the folder location to save the documents is specified in the entry template, you select the root in the browse tree and then click New on the toolbar.

If no entry template is associated with the root folder, all entry templates that are available for the repository are listed.

IBM Training

Duplicate documents



IBM Content Navigator Edit Service

Figure 7-21. Duplicate documents

The upper screen capture shows the Create New > New Document with Desktop Apps action. The lower screen capture shows the New Document page and the Classification option (checkbox) is highlighted.

- Right-click a document and then select Create New > New Document with Desktop Apps from the menu list.
- On the New Document page, if you select the Classification option (checkbox), the new document is classified (class and properties for the class) based on the original document's class and properties.

IBM Training

Unit summary

- Describe the use of IBM Content Navigator Edit service
- Configure the Edit Service client
- Use the Edit Service client to edit repository documents

IBM Content Navigator Edit Service

Figure 7-22. Unit summary

IBM Training

Review questions

1. True or False: You can create custom templates and categories for specific MIME types for use with the Edit service.

2. By default, the Edit service includes support for which of the following documents? (Select one)
   A. Text
   B. PDF
   C. Image
   D. Microsoft Office

3. True or False: Use of document entry templates are not supported for adding documents with Edit service.

IBM Content Navigator Edit Service

Figure 7-23. Review questions

Write your answers here:

1.

2.

3.

IBM Training

Review answers

1. True or False: You can create custom templates and categories for specific MIME types for use with the Edit service.
   The answer is True.

2. By default, the Edit service includes support for which of the following documents? (Select one)
   A. Text
   B. PDF
   C. Image
   D. Microsoft Office
   The answer is D.

3. True or False: Use of document entry templates are not supported for adding documents with Edit service.
   The answer is False.

IBM Content Navigator Edit Service

Figure 7-24. Review answers

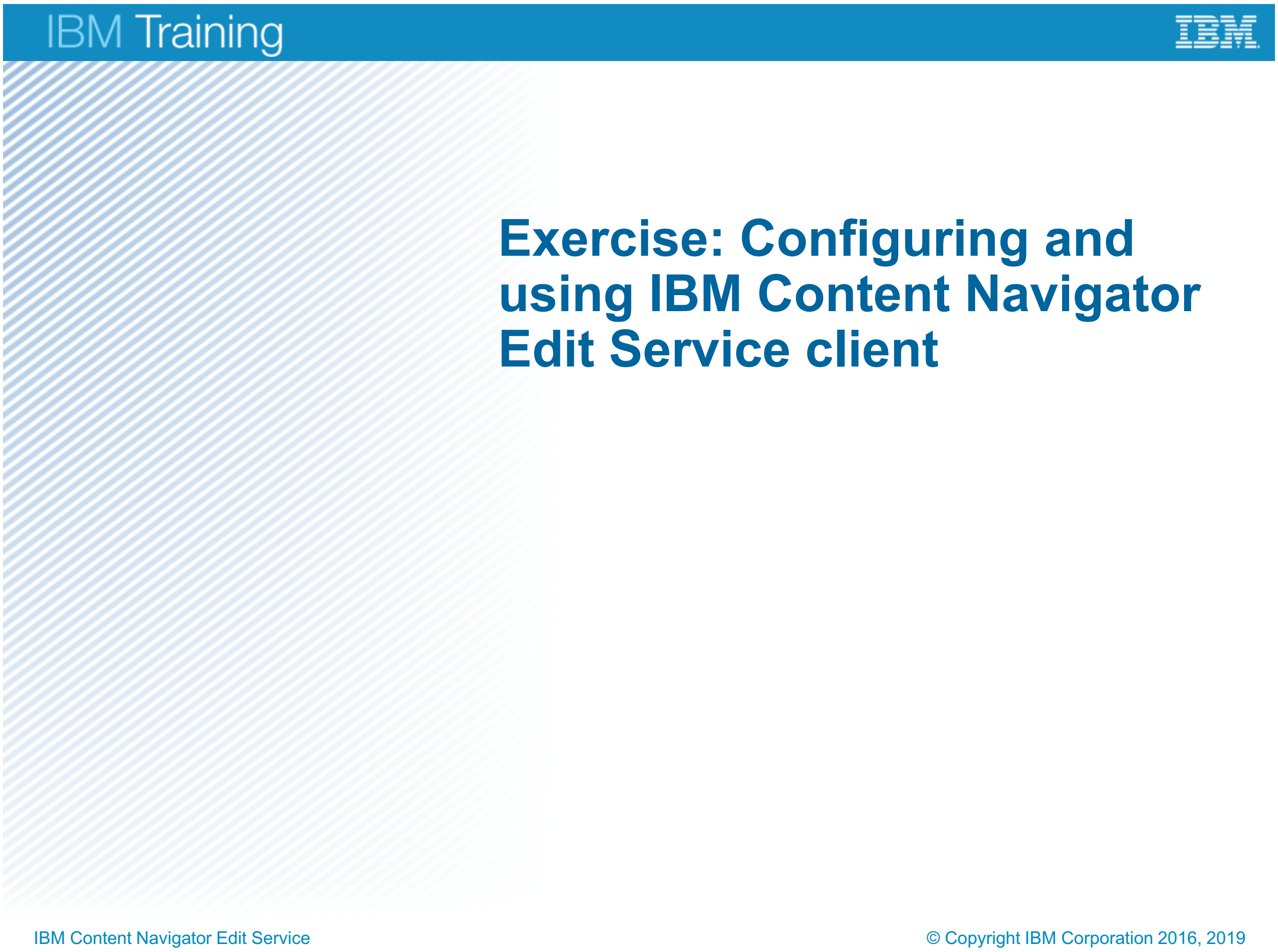


Figure 7-25. Exercise: Configuring and using IBM Content Navigator Edit Service client

IBM Training

Exercise objectives

- Configure Edit service
- Use Edit service to edit repository documents

IBM Content Navigator Edit Service

Figure 7-26. Exercise objectives

Unit 8. External Share

Estimated time

01:00

Overview

This unit explains how to configure external share and share the repository content in a secured manner with users from an external organization.

How you will check your progress

- Review
- Exercise

References

https://www.ibm.com/support/knowledgecenter/SSEUEX_3.0.6/com.ibm.installingeuc.doc/eucco163.htm

IBM Training

Unit objectives

- Describe how the external share works
- Understand high-level requirements for external share
- 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

External Share

Figure 8-1. Unit objectives

IBM Training

Topics

- What is External Share?
- IBM Content Navigator configuration for External Share
- Other configuration for External Share
- Manage External Share

External Share

Figure 8-2. Topics

8.1. What is External Share?

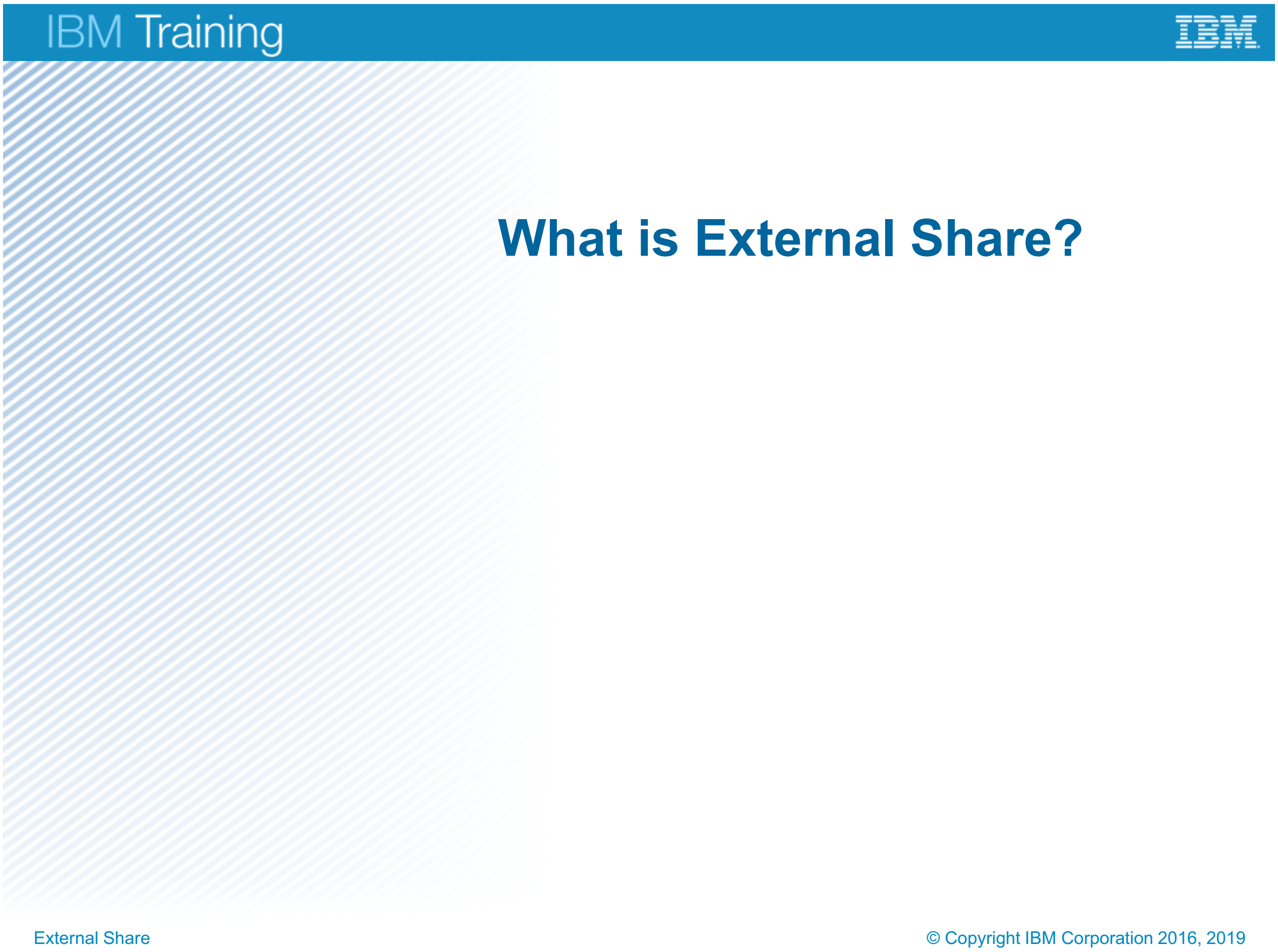
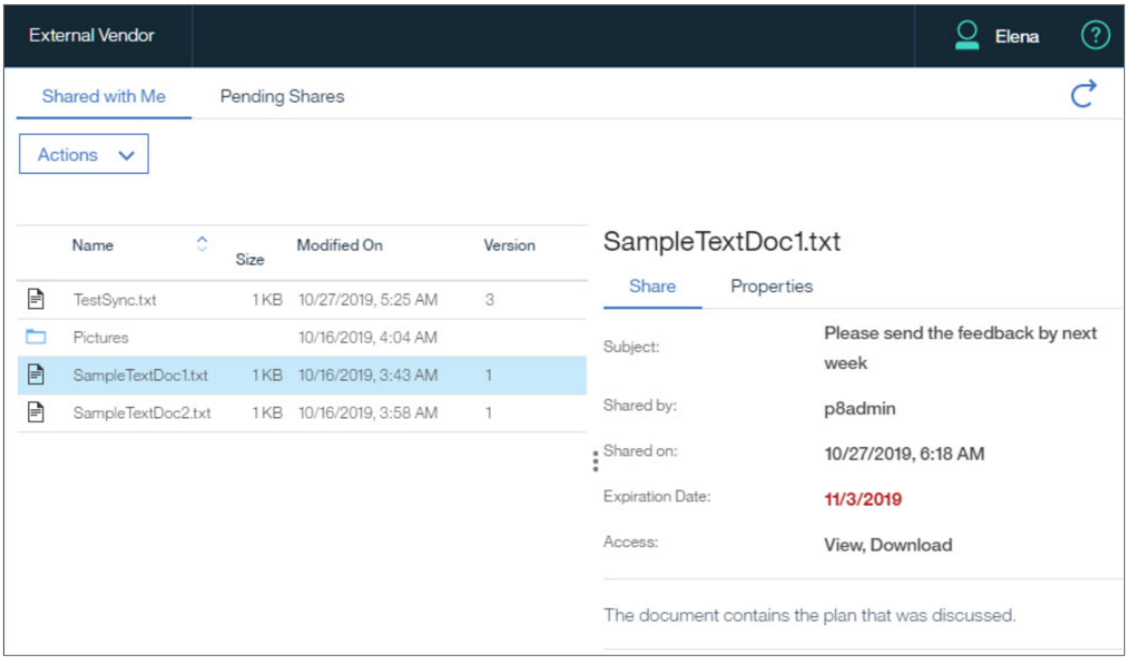


Figure 8-3. What is External Share?

IBM Training

What is External Share?

- External Share allows ICN customers to securely share documents with people outside of their organization.



External Share

Figure 8-4. What is External Share?

The screen capture shows an external IBM Content Navigator (ICN) desktop with the documents that are shared for external users.

With the External Share feature, you can extend your enterprise by securely sharing documents with people outside of your organization. You can collaborate directly with external parties such as existing customers, potential customers, suppliers, consultants, outside legal counsel.

With the External Share feature:

- You do not have to make copies of any documents
- You can manage your records in place

Only authorized users can share a document. Sharing is controlled through access rights.

8.2. IBM Content Navigator configuration for External Share

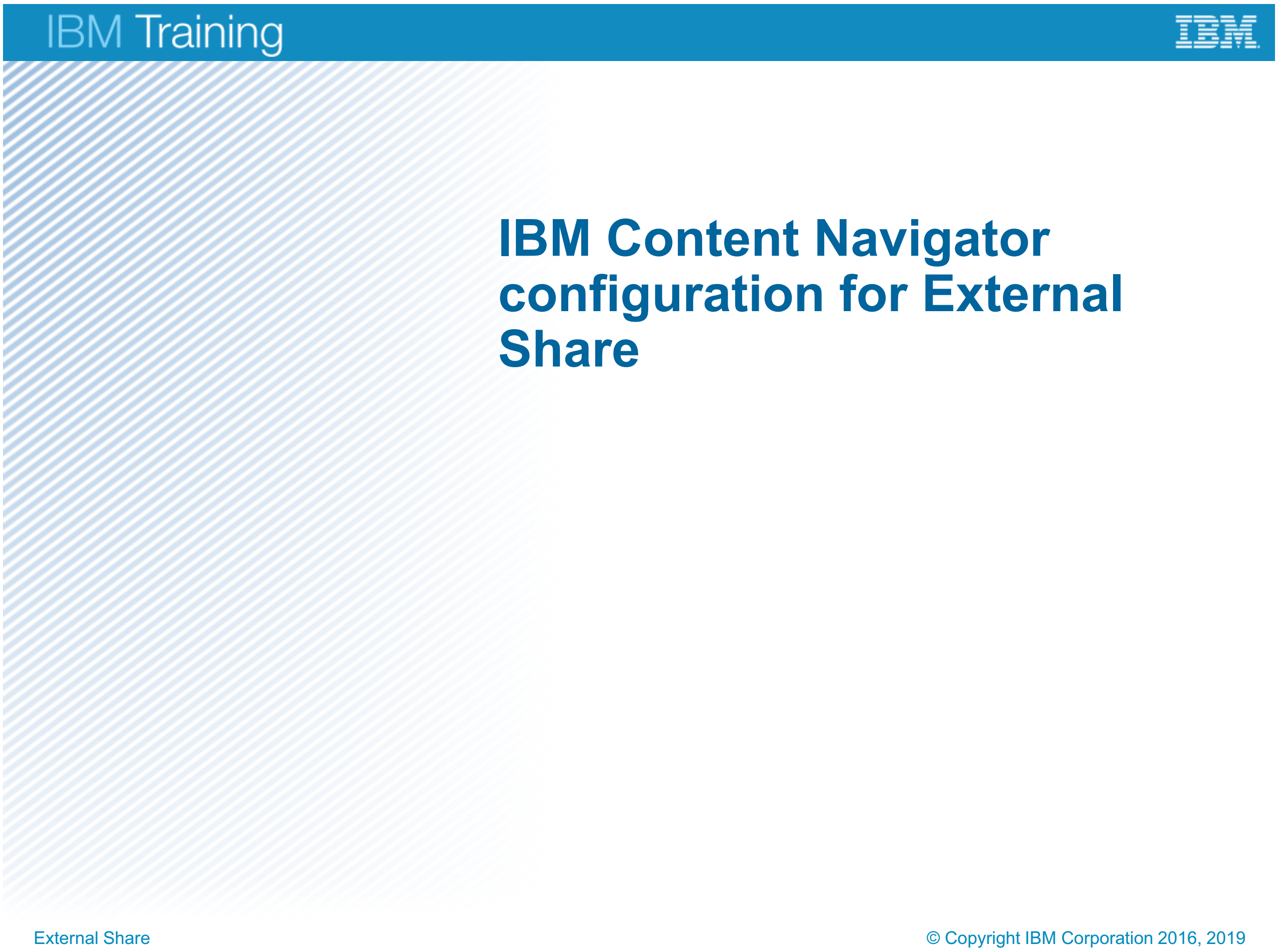


Figure 8-5. IBM Content Navigator configuration for External Share

IBM Training

High-level requirements

- Prerequisite software for the external share feature
- Content Platform Engine (CPE) configuration
  - CPE is the main engine for the FileNet Content Manager repositories
- Configure the following servers in ACCE:
  - External User Directory Server
  - Mail Transfer Protocol (SMTP) Server
- Configure IBM Content Navigator to enable the share feature

External Share

Figure 8-6. High-level requirements

Prerequisites for the external share feature

- IBM Content Navigator (ICN)
- Content Platform Engine (CPE)
- WebSphere 9.0 for traditional installation or use a container installation
- User-provisioned and managed External User LDAP Realm

  This LDAP is in addition to the LDAP used for managing internal users of the FileNet P8 environment
- Sharing is supported in English only
- A mail server

Content Platform Engine (CPE) configuration

- Add the external LDAP realm to CPE to identify external users

  The LDAP configuration is used for both authentication and lookup for the external users.
- Sync LTPA keys across all the CPE and ICN servers in the domain

IBM Content Navigator (ICN) configuration

- Setup JAX-RS 2.0
- Add the external LDAP realm
- HTTPOnly must be disabled on the JSESSIONID
- Sync LTPA keys across all the CPE and ICN servers in the domain

Use the Administration Console for Content Platform Engine (ACCE) to:

- Add the External User Directory Server
- Configure the Simple Mail Transfer Protocol (SMTP) Server
- Set permissions for the document and folder classes

Configure IBM Content Navigator to enable the share feature:

- Install the share plug-in
- Enable a FileNet Content Manager repository for sharing
- Create a custom desktop for external users
- Configure and add the share menu actions
- Optionally, customize the email template provided with the software

IBM Training

IBM Content Navigator configuration for external share

- High-level configuration:
  - Install and configure the share plug-in
  - Configure share on a repository
  - Set up desktops for internal and external users

External Share

Figure 8-7. IBM Content Navigator configuration for external share

The Share feature is provided by the Share plug-in and the Share REST services that are included in IBM Content Navigator product.

IBM Training

Share plug-in

Share plug-in includes:

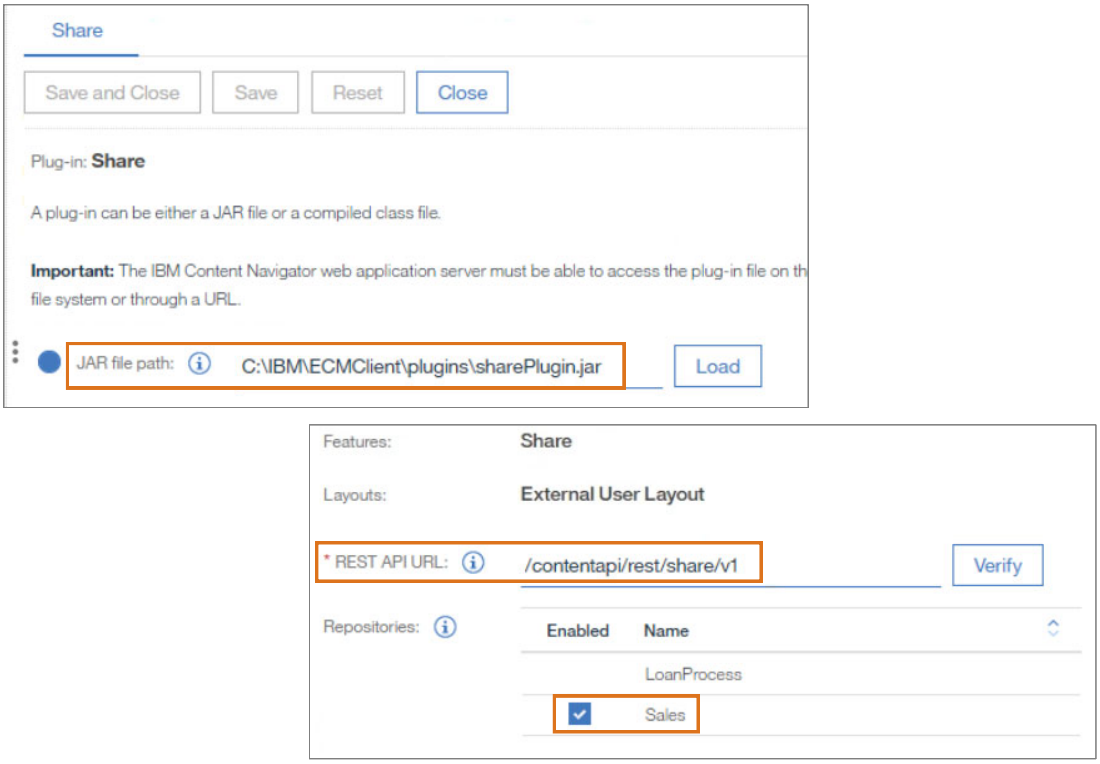
- Share feature
  - My Shares view for share issuers
  - Shared with Me view for share recipients
  - Pending Shares view for share recipients
- Share action
- External User Layout for external desktops
  - Limits core features to Share
- Default Share plug-in banner tools context menu for external desktops
  - Hides Add or New actions like Add Document and New Folder

External Share

Figure 8-8. Share plug-in

IBM Training

Configure the Share plug-in



External Share

Figure 8-9. Configure the Share plug-in

The upper screen capture shows the location for the share plug-in on the plug-in page in IBM Content Navigator (ICN). The default location is: ECMClient_install_dir\plugins\sharePlugin.jar. After you load the plug-in, you must save the plug-in to get access to settings.

The lower screen capture shows the settings for the plug-in:

- Set REST API URL: /contentapi/rest/share/v1
- Verify the URL to ensure that the Share REST service is available
- Configure Share on a repository

You must log in to the ICN admin desktop as a FileNet P8 domain administrator to configure the plug-in.

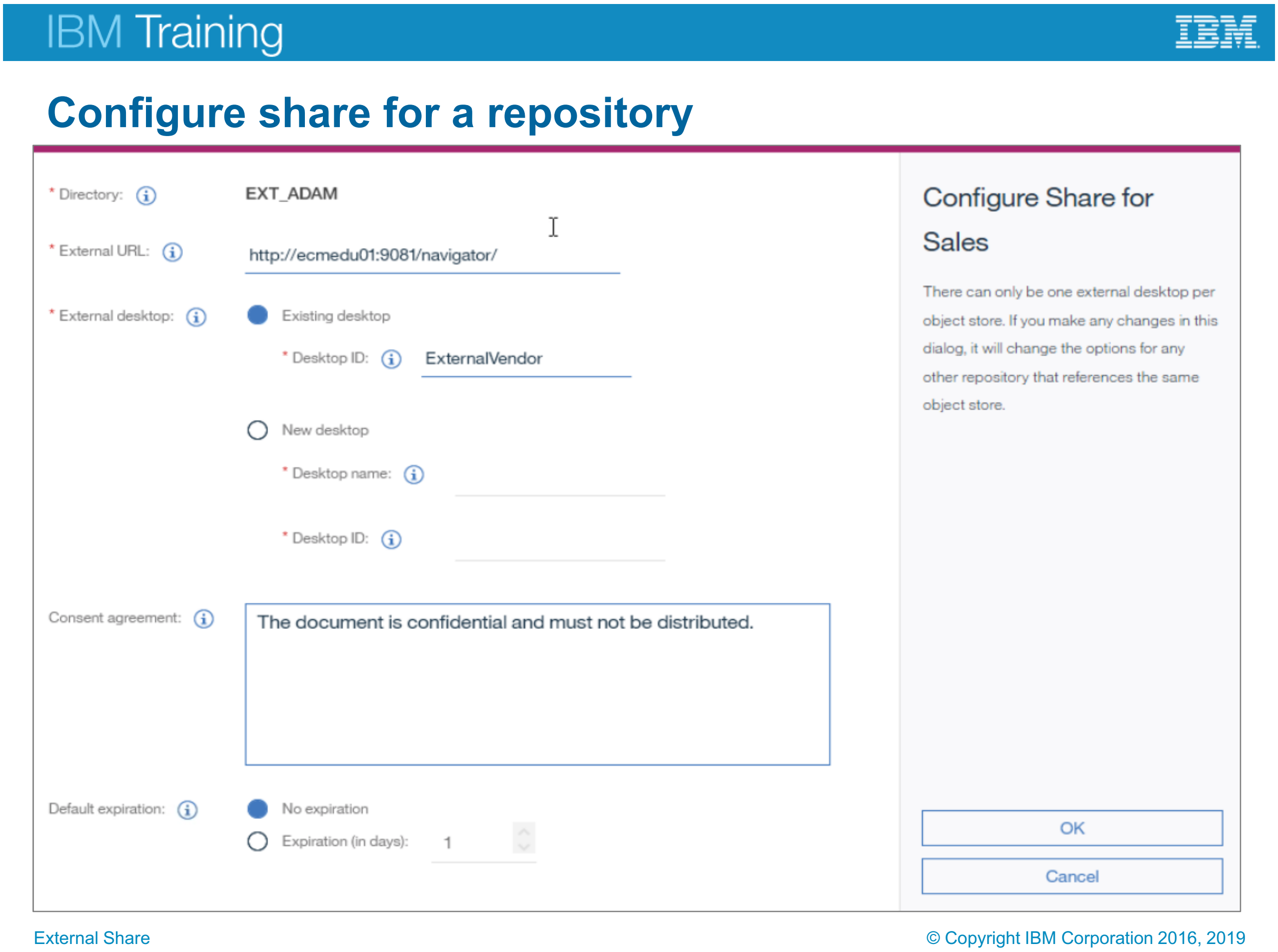


Figure 8-10. Configure share for a repository

The screen capture shows the share configuration for a repository.

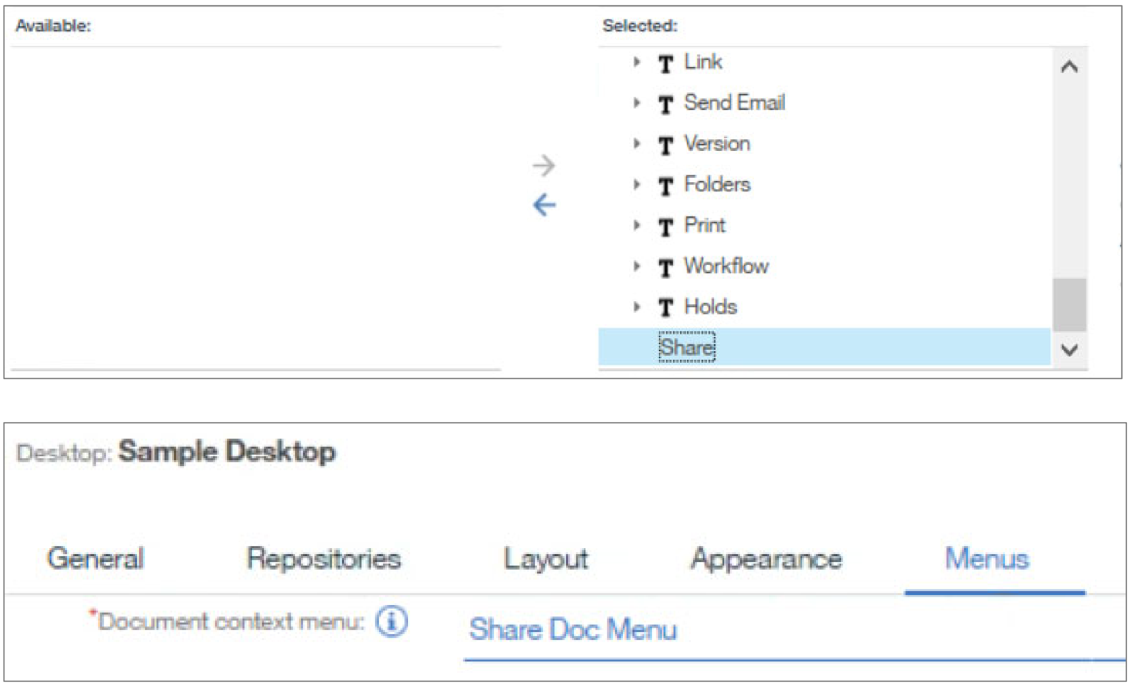
- Set the IBM Content Navigator (ICN) base URL that external users use to access shares.
- Specify an existing external desktop ID or create a new one.
- Set the default expiration date for the external share documents
- Set a consent agreement to be shown when an external user accepts shares

If you choose an existing desktop, that desktop must:

- Belong to the ICN instance of the specified URL.
- Be associated with only one repository
- Be enabled for the Share feature
- Be associated with the External User Layout
- Include the Default Share plug-in banner tools context menu

IBM Training

Configure a Desktop for Internal Users



External Share

Figure 8-11. Configure a Desktop for Internal Users

The upper screen capture shows the custom menu with the Share menu item. The lower screen capture shows the custom menu that is associated with the internal desktop that is used for share.

From the admin desktop > Menus, make a copy of the Default document context menu to create a custom menu. Add the Share action to the custom menu.

Update the desktop (that is used by internal users):

- Add the custom menu
- Add the Share feature
- Select one or more share-enabled repositories

8.3. Other configuration for External Share

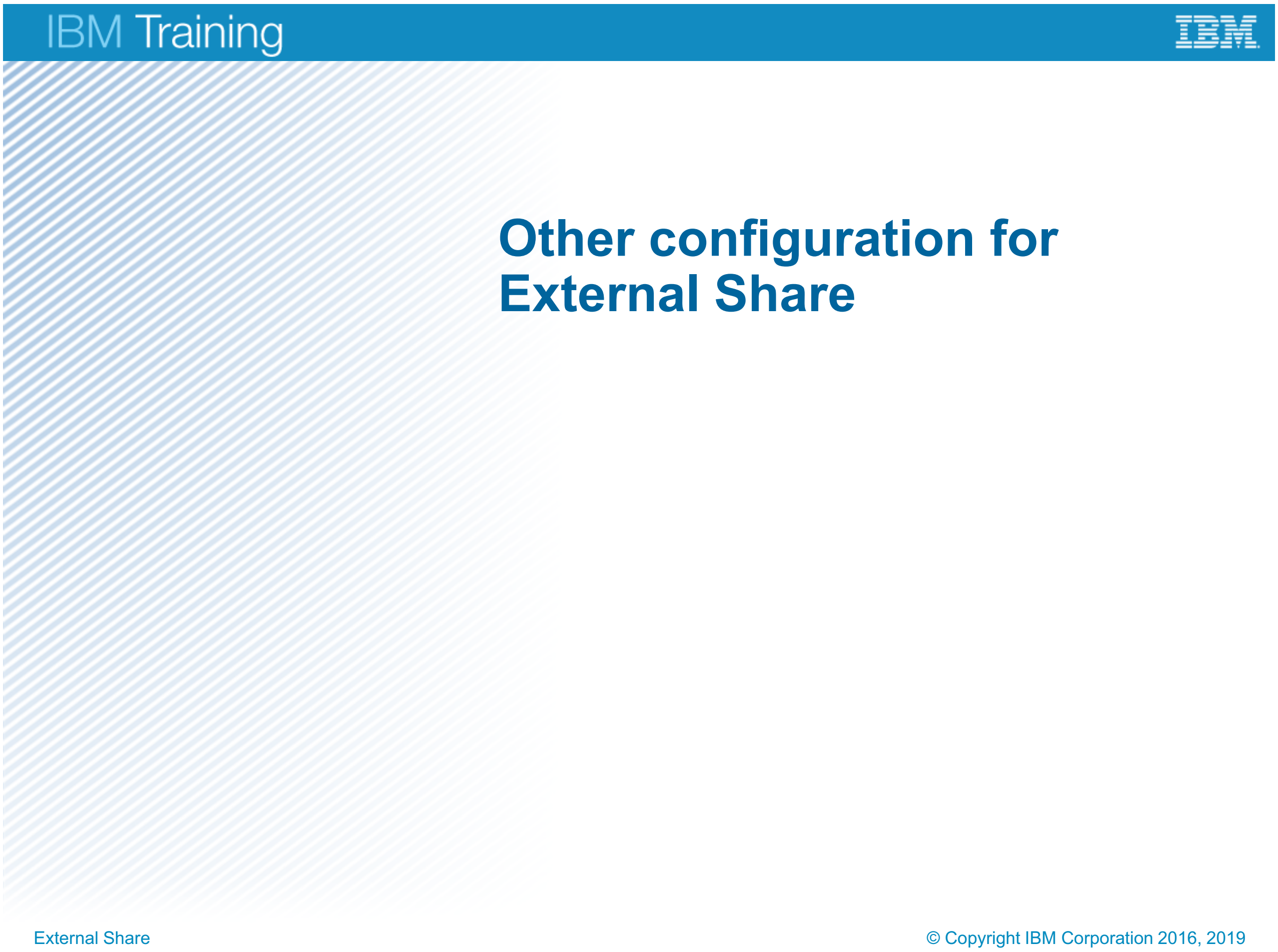


Figure 8-12. Other configuration for External Share

IBM Training

Other configuration for External Share

- External User LDAP Realm
- Directory configuration
- SMTP configuration
- Change the Document Share class security

External Share

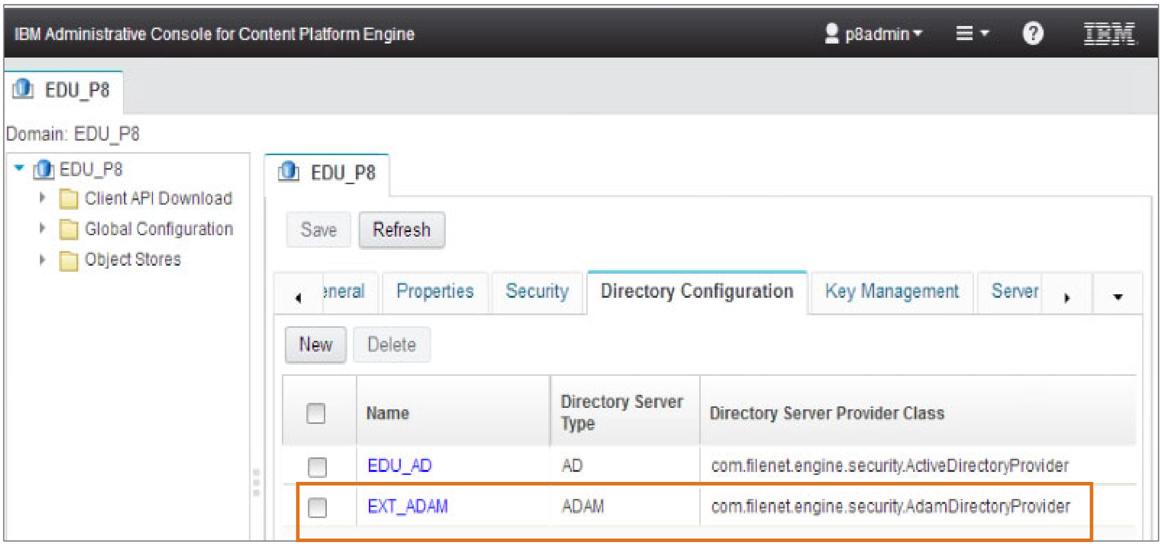
Figure 8-13. Other configuration for External Share

In Administration Console for Content Platform Engine (ACCE) > for the repository that is used for the external share, change the Document Share class security.

Remove the share permissions for large groups such as #AuthenticatedUser, if you don't want all users to be able to see the contents of shared documents.

IBM Training

Configure the External User Directory in ACCE



External Share

Figure 8-14. Configure the External User Directory in ACCE

The screen capture shows the LDAP directory realm configuration for external users in Administration Console for Content Platform Engine (ACCE).

To add the new LDAP directory realm for external users, do the following steps in ACCE:

1. Open the FileNet P8 domain, and click the Directory Configuration tab.
2. Click New, and add the LDAP directory realm that you configured for external users.
3. In the Properties, set the value for the Principal Category property to External.
4. Set the value for the Exclude From Authenticated Users property to True.

    This setting prevents external users from accessing any content with the #AuthenticatedUsers permission setting

5. Map the User Display Name Attribute displayName
6. Set the Principle Category to External

External User LDAP Realm is a customer-managed LDAP directory realm for the external users:

- The internal and external LDAP directory realms must be federated.
- The directory realms must be a supported type for the FileNet P8 Platform environment; IBM Virtual Member Manager (VMM) is not supported.

- The external and internal LDAP directory realms can be on the same or different LDAP servers.

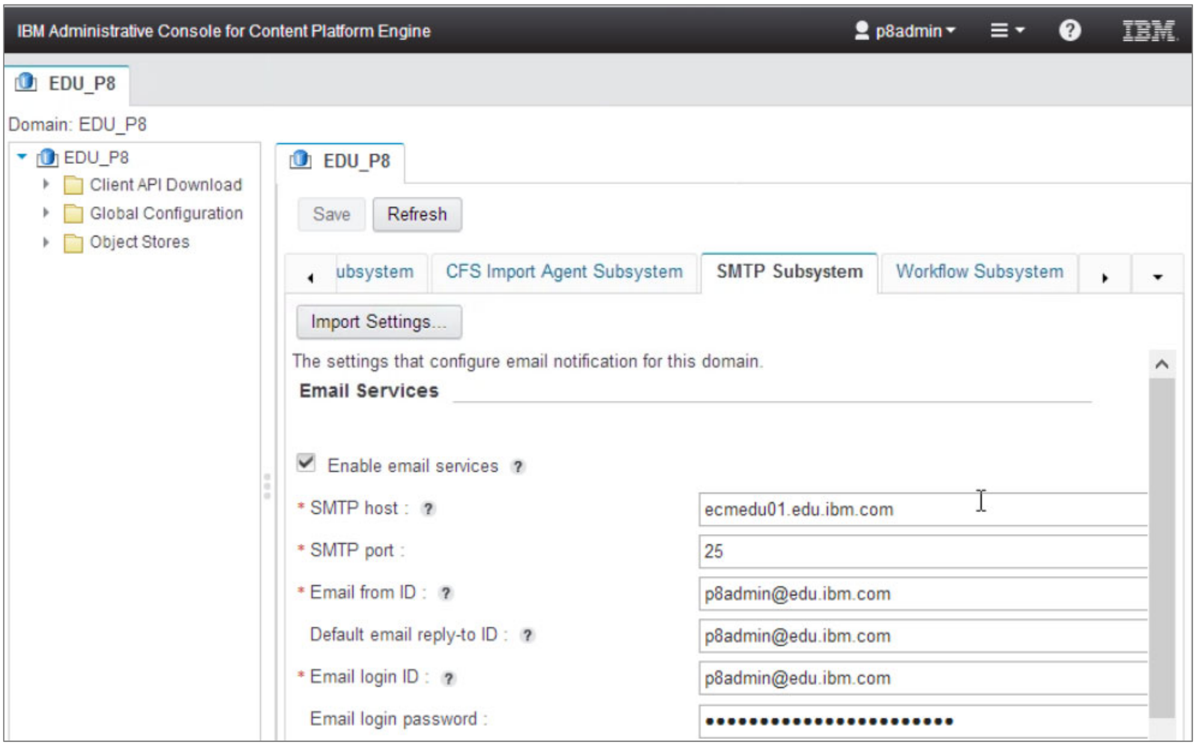
  If you use the same LDAP server for both external and internal users, any subtrees that stem from a single LDAP domain root must be independent. There cannot be any ancestor-descendant relationships.
- The external realm name must be the same for both the Content Platform Engine (CPE) and IBM Content Navigator (ICN) servers.
- The external realm name must be different than the internal realm name.
- The LDAP short name for a user must be unique across all LDAP realms that are configured in the FileNet P8 domain.

  https://www.ibm.com/support/knowledgecenter/en/SSNW2F_5.5.0/com.ibm.p8.security.doc/p8psd000.htm
- Your dedicated external LDAP directory realm must include the mail attribute and the email address for the users.
- External share notifications are sent to external users via email.
- LDAP display name attribute needs to be populated (Example: displayName)

While you can configure the LDAP realm directly in the application servers, both CPE and ICN provide tools for the configuration. If you use the CPE and ICN tools, use the task Config LDAP.

IBM Training

SMTP configuration for External Share



External Share

Figure 8-15. SMTP configuration for External Share

The screen capture shows the SMTP configuration in Administration Console for Content Platform Engine (ACCE).

You must configure an email server in ACCE. This configuration is required to send emails to the external users with whom documents are shared.

- The mail attribute in the LDAP is used to determine the email address for the external user, so it must be populated.
- All emails to external users are sent from the email address that is provided in the Email From ID setting.

8.4. Manage External Share

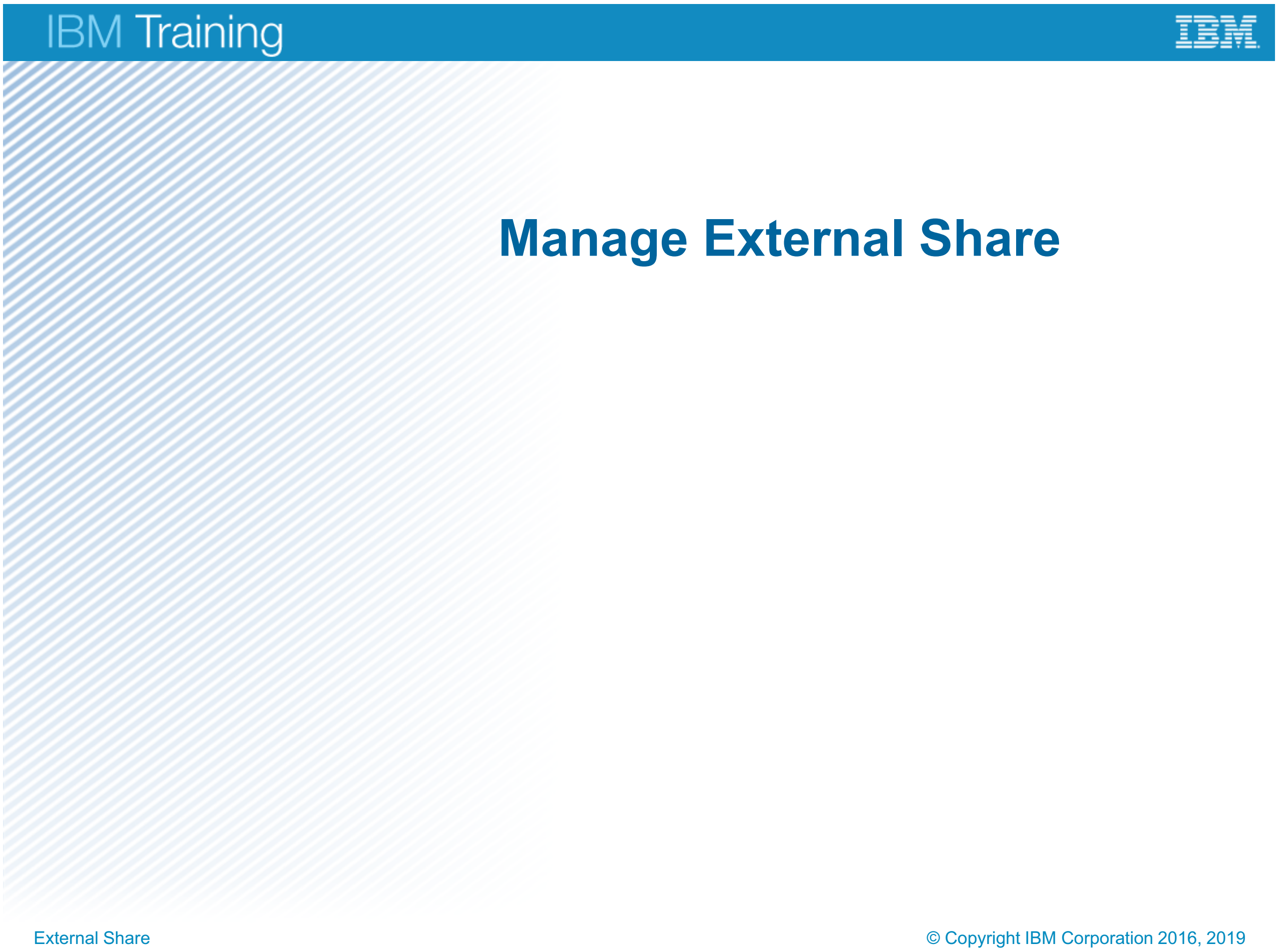


Figure 8-16. Manage External Share

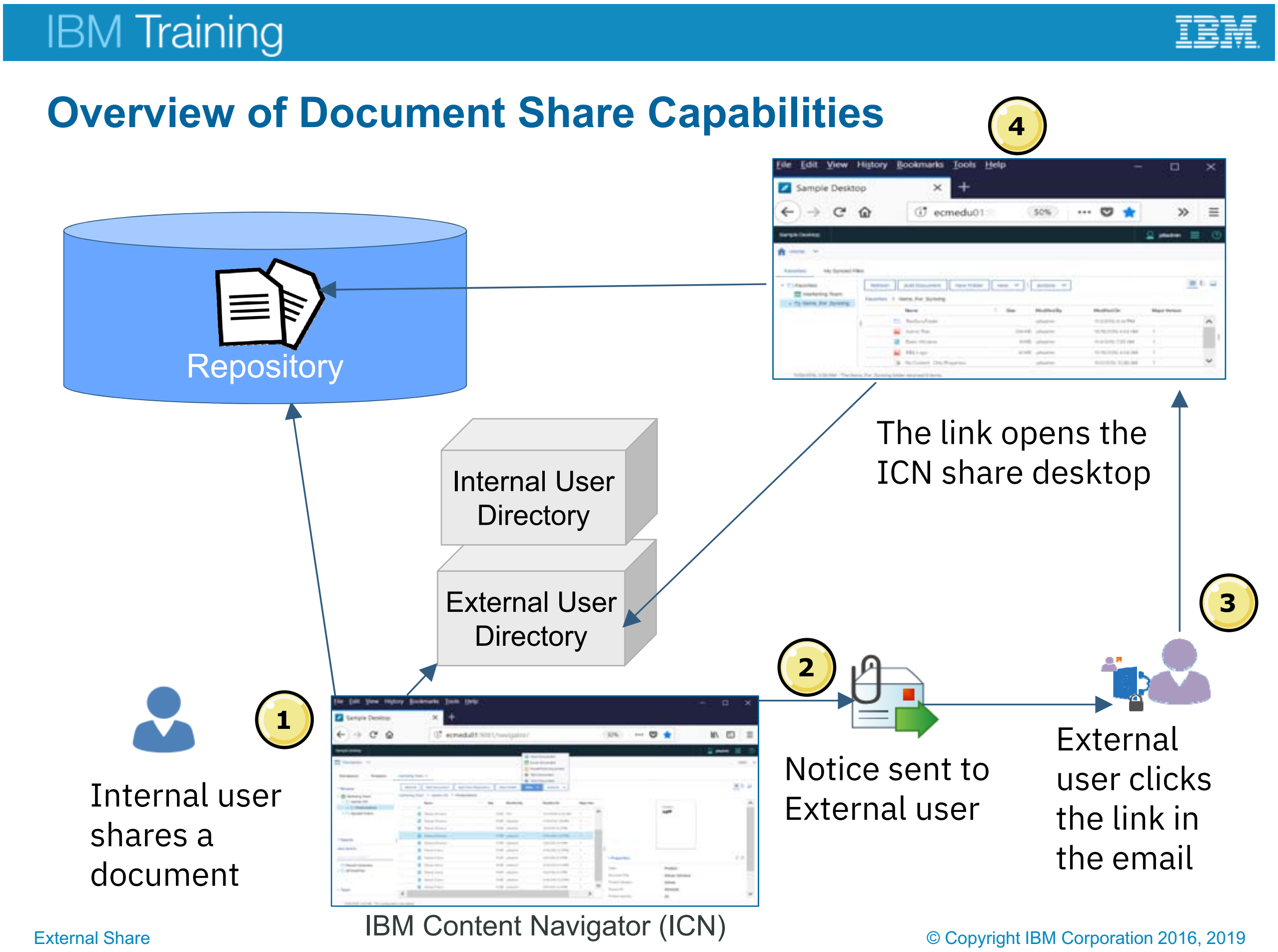


Figure 8-17. Overview of Document Share Capabilities

The screen capture shows the process of document share.

1. An authorized internal user (who exists in the Internal User Directory) shares a repository document with an external user in IBM Content Navigator.

   User selects documents to share and enters share information.

   The external user is an authorized user and exists in the External User Directory.

   In a single view, internal user can easily see what is shared

2. The external user receives email notification. The external user clicks the ‘Accept the Share’ link in the email.
3. The link opens the external IBM Content Navigator share desktop.
4. The desktop is a simplified view for the external users who can access only the Share feature on the desktop. Depending on their permissions, the user can view, download, and edit and upload a new version of the document.

IBM Training

Document Share Highlights

- Enables you to identify which documents you want to share, with whom, and for how long
- Based on the permissions granted, external users can:
  - View documents
  - Download documents
  - Edit the documents and upload a newer version
- Issuer can set a share expiration date for a share
- IBM Content Navigator provides two views to help track what is shared:
  - My Shares for share issuers
  - Shared with Me for external users

External Share

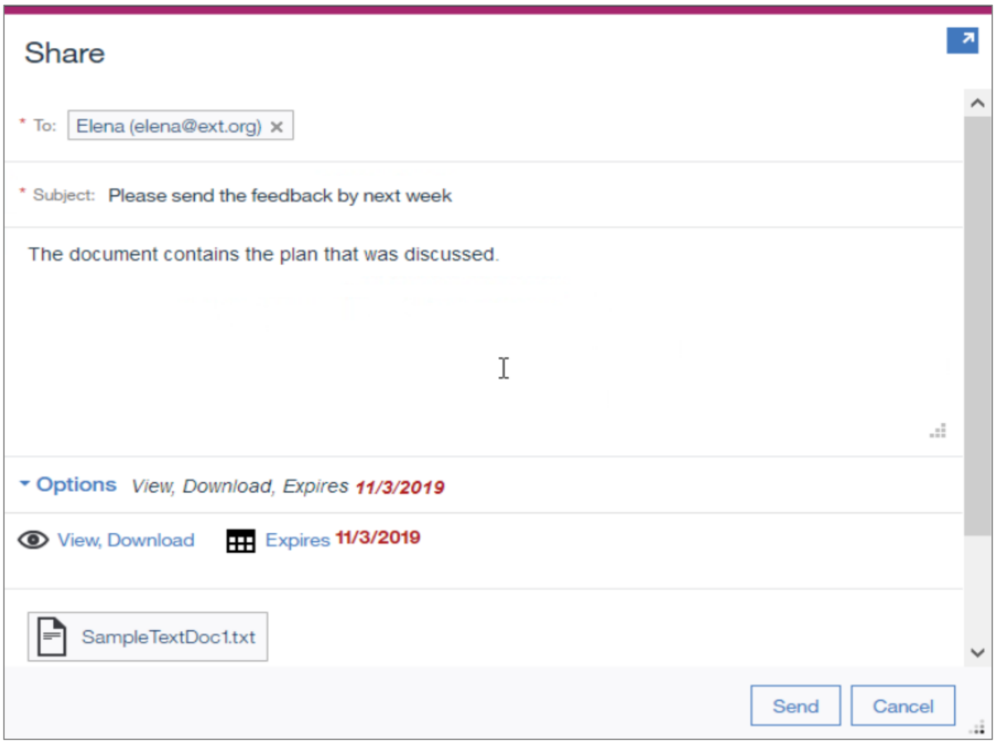
Figure 8-18. Document Share Highlights

For external share:

- Set an optional share expiration date
- Share message provides context
- Dedicated views make it easy to see documents that are shared
- Shares are tracked and auditable
- Share folders and documents

IBM Training

Share documents as an internal user



External Share

Figure 8-19. Share documents as an internal user

The screen capture shows the Share action page in IBM Content Navigator.

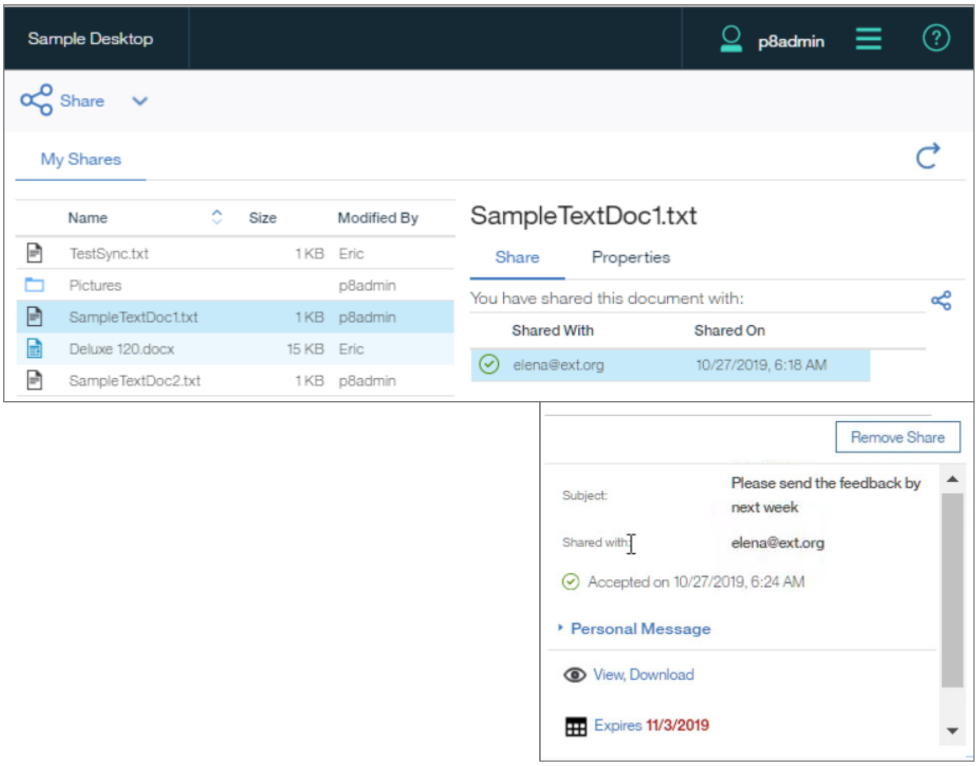
Use the Share action to share one or more documents with content:

- Add recipient emails by using type-ahead suggestions sourced from the external directory
- Add a Subject
- Include an optional message
- Grant recipients rights to view, download, and edit the documents
- Set an expiration date

Internal item types such as Search Templates cannot be shared.

IBM Training

Manage shares as an internal user



External Share

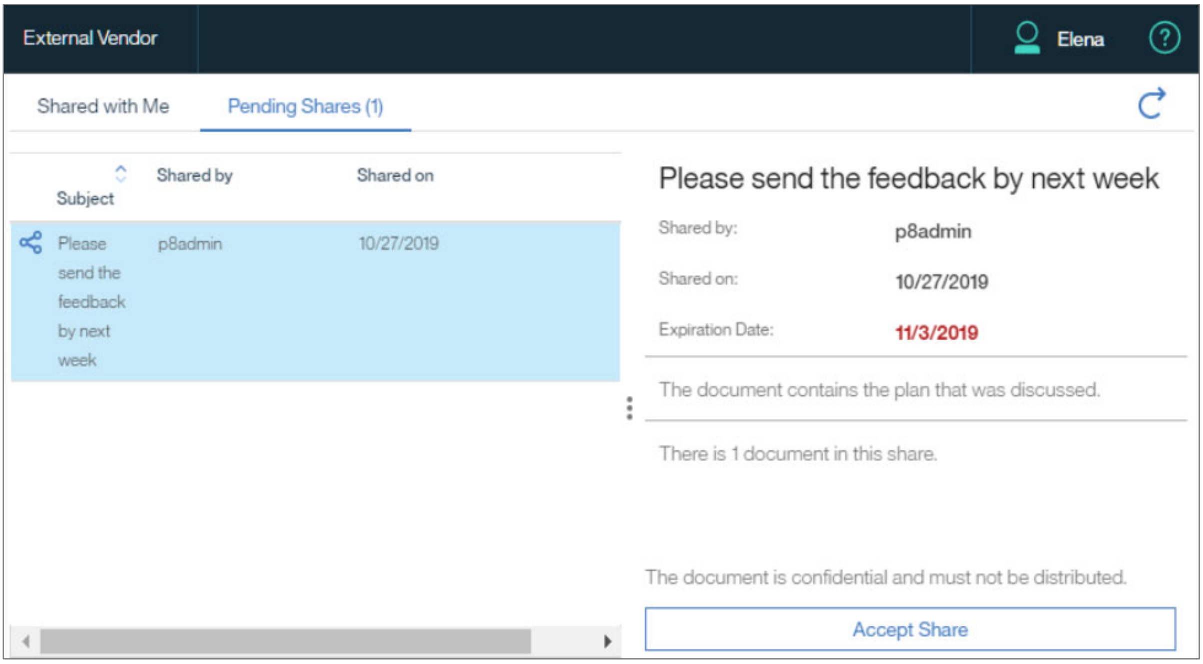
Figure 8-20. Manage shares as an internal user

The screen capture shows the Share page for an internal user. You can manage your shares on this page.

- View documents that you shared in Share > My Shares
- Select a document to view who you shared it with and when
- Select a recipient to view share details, and update the privileges and expiration date
- Remove a share

IBM Training

Accept shares as an external user



External Share

Figure 8-21. Accept shares as an external user

The screen capture shows the Share page > Pending Shares tab for an external user.

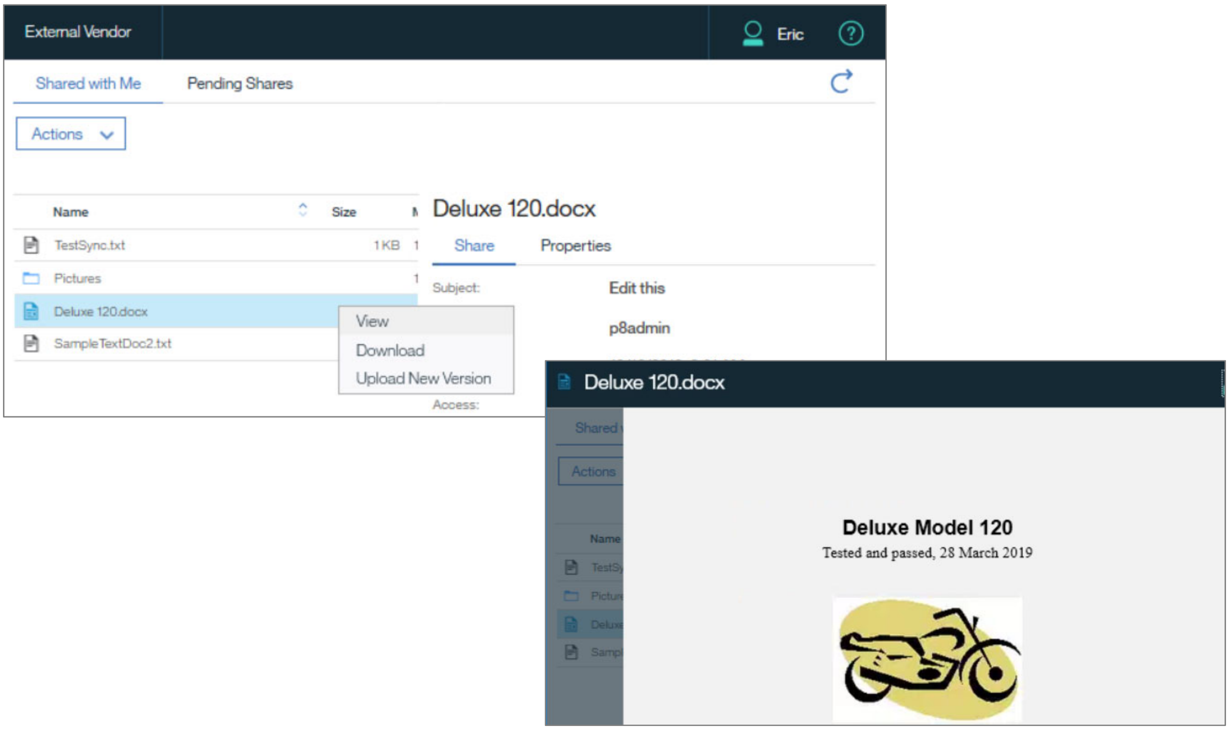
- External users are notified by email when they receive a share.
- When they click the "Accept the Share" link in the email, it opens IBM Content Navigator (ICN).
- Share is auto-accepted and displayed upon login (under Just accepted)
- Select a document to view share details

The external users can directly access the ICN desktop without an email, and accept the shared documents and folders from Share > Pending Shares.

After you accept the shares, the documents are listed on the Shared with Me tab.

IBM Training

View, download, or upload a new version (External user)



External Share

Figure 8-22. View, download, or upload a new version (External user)

The upper screen capture shows the actions available for a shared document for an external user (View, Download, and Upload New Version). The lower screen capture shows that a document opened in the viewer when View action is selected.

IBM Training

Exercise objectives

- Register the share plug-in
- Configure share on a repository
- Verify the external desktop for share
- Create a menu for the internal desktop for share
- Configure the internal desktop for share

Figure 8-23. Exercise objectives

IBM Training

Unit summary

- Describe how the external share works
- Understand high-level requirements for external share
- 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

External Share

Figure 8-24. Unit summary

IBM Training

Review questions

1. True or False: The External Share feature requires you to make copies of any documents that you share.

2. What is the function of the Default Share plug-in banner tools context menu for external desktops?
   A. Hides Add Document and New Folder actions
   B. Shows Add Document and New Folder actions
   C. Modifies Checkout and Delete actions
   D. Adds Merge and Split action

3. True or False: Based on the permissions granted, external users can view, download, and upload a newer version of a document.

External Share

Figure 8-25. Review questions

Write your answers here:

1.

2.

3.

IBM Training

Review answers

1. True or <u>False</u>: The External Share feature requires you to make copies of any documents that you share.
   The answer is <u>False</u>.

2. What is the function of the Default Share plug-in banner tools context menu for external desktops?
   A. <u>Hides Add Document and New Folder actions</u>
   B. Shows Add Document and New Folder actions
   C. Modifies Checkout and Delete actions
   D. Adds Merge and Split action
   The answer is <u>A</u>.

3. <u>True</u> or False: Based on the permissions granted, external users can view, download, and upload a newer version of a document.
   The answer is <u>True</u>.

External Share

Figure 8-26. Review answers

IBM Training

Exercise: Configuring and managing External Share

External Share

Figure 8-27. Exercise: Configuring and managing External Share

IBM Training

Exercise objectives

- 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

External Share

Figure 8-28. Exercise objectives

Unit 9. Course summary, badge, and other learning resources

Estimated time

00:30

Overview

This unit contains the course objectives and provides information on the badges and other learning resources

How you will check your progress

- Review

IBM Training

Unit objectives

- Describe the course objectives and what you learned
- Earn a badge for this course
- Identify and describe product certifications that are related to this course
- Identify resources that can help you learn more

Figure 9-1. Unit objectives

IBM Training

Course objectives (1 of 2)

- Identify the capabilities of IBM Content Navigator
- 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

Figure 9-2. Course objectives (1 of 2)

IBM Training

Course objectives (2 of 2)

- Configure entry template management
- Build and manage entry templates to add documents
- Associate entry templates with a folder
- 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

Figure 9-3. Course objectives (2 of 2)

IBM Training

IBM badge

- Earn a Skills badge for this course by passing a quiz
- To earn the badge for this course:
  https://www.onlinedigitallearning.com/course/view.php?id=5778
- Other IBM Cloud badges:
  https://www.ibm.com/developerworks/community/groups/service/html/communitystart?communityUuid=bd570318-14bf-4277-bddc-56a74b904e41

Figure 9-4. IBM badge

IBM Training

IBM Professional Certifications

- By achieving an IBM Professional Certification, you can demonstrate your IBM Cloud product mastery to your employer or clients
- Certifications are a higher level of credential than a Skills badge for a single education course
- Product certifications demonstrate a strong knowledge of the product and typically require several months of work with the product
- IBM Cloud certifications are available for several roles, including developers, administrators, and business analysts
- For information on specific certifications and their requirements, see http://www.ibm.com/certify

Figure 9-5. IBM Professional Certifications

IBM Training

Other learning resources (1 of 4)

- **IBM Skills Gateway**
  - Search the new IBM Training and Skills website (formerly IBM Authorized Training website) to find and access the content you want.
  - https://www-03.ibm.com/services/learning/ites.wss/zz-en?pageType=page&c=a0011023

- **IBM Cloud Education Wiki Home**
  - Go to the wiki to find course abstracts, course correction documents, and curriculum development plans for IBM Cloud offerings.
  - https://www.ibm.com/developerworks

- **Role-based Learning Journeys**
  - Learning Journeys describe the appropriate courses, in the recommended order, for specific products and roles.
  - https://www.ibm.com/services/learning/ites.wss/zz-en?pageType=page&c=a0003096

Figure 9-6. Other learning resources (1 of 4)

IBM Training

Other learning resources (2 of 4)

- **IBM Professional Certification Program**
  - IBM Professional Certification enables skilled IT professionals to demonstrate their expertise to the world. It validates skills and proficiency in the latest IBM technology and solutions.
  - https://www.ibm.com/certify
- **IBM Training blog, Twitter, and Facebook**
  - These official IBM Training and Skills accounts provide information about IBM course offerings, industry information, conference events, and other education-related topics.
  - https://www.ibm.com/blogs/ibm-training
  - https://twitter.com/IBMTraining
  - https://www.facebook.com/ibmtraining

Figure 9-7. Other learning resources (2 of 4)

IBM Training

Other learning resources (3 of 4)

- **Business Partner Technical Enablement Portal**
  - https://ibm.box.com/s/695khv9nyzekaorykqmsjrematz3v9xh
  - This program provides technical training content modules to IBM software partners (via PartnerWorld) and IBM Business Partners.

- **IBM Developer**
  - IBM's official developer program offers access to software trials and downloads, how-to information, and expert practitioners.
  - https://developer.ibm.com

- **IBM Education Assistant**
  - These multimedia educational modules help users gain a better understanding of IBM Software products and use them more effectively to meet business requirements.
  - https://www.ibm.com/products/software

Figure 9-8. Other learning resources (3 of 4)

IBM Training

Other learning resources (4 of 4)

- **IBM Knowledge Center**
  - The IBM Knowledge Center is the primary home for IBM product documentation.
  - https://www.ibm.com/support/knowledgecenter
- **IBM Marketplace**
  - IBM Marketplace is the landing page for all IBM Cloud products. Go to the Marketplace to learn about IBM offerings for Cloud, Cognitive, Data and Analytics, Mobile, Security, IT Infrastructure, and Enterprise and Business Solutions.
  - https://www.ibm.com/products
- **IBM Redbooks**
  - IBM Redbooks are developed and published by the IBM International Technical Support Organization (ITSO). Redbooks typically provide positioning and value guidance, installation and implementation experiences, typical solution scenarios, and step-by-step "how-to" guidelines.
  - http://www.redbooks.ibm.com

Figure 9-9. Other learning resources (4 of 4)

IBM Training

Unit summary

- Describe the course objectives and what you learned
- Earn a badge for this course
- Identify and describe product certifications that are related to this course
- Identify resources that can help you learn more

Figure 9-10. Unit summary

IBM Training

Course completion

You have completed this course:
IBM Content Navigator Administration V3.0.6

Do you have any questions?

Figure 9-11. Course completion

IBM Training