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October 21, 2014

Product Implementation Training (PIT)

Content Platform Engine 5.2.1 GA

ACCE Improvements Part 1



Introduction

- Course Overview
 - Process Configuration Console Functions added to ACCE
 - Email Notification, Searches, Process Administrator Functions added to ACCE, ICN Process Applets Plug-in and ACCE Plug-in
 - Demonstration of ACCE and Process Applets Plug-ins for IBM Content Navigator
 - Indexing, Site, Storage and Sweep Improvements
 - CPE Download Service and Read-Only Administration
 - Subscription, Document & Custom Object Wizard Improvements
 - ACCE Translation and Localization
- Target Audience
 - Customer Support and Field Technical Resources
- Suggested Prerequisites
 - Familiarity with Content Platform Engine
- Version release date – November 2014

Course Objectives

After this course you will be able to:

- *Describe what's new and different in Administration Console for Content Platform Engine in Release CPE 5.2.1*

Course Roadmap

- ➔ Process Configuration Console Functions added to ACCE
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Content Platform Engine 5.2.1 GA

Process Configuration Console Functions added to ACCE



Workflow Systems/Legacy Workflow Systems Configuration

- Runtime Options
- Language Packs
- Web Applications
- DbExecution Connections
- Remote Servers
- Advanced Properties

ACCE Isolated Region Configuration

- New Isolated Regions Folder Added to Navigation Pane
- Isolated Region Properties
 - Isolated Region Table Spaces/File Groups
 - Connection Points
 - Event Logging Options
 - Step Processors
 - Web Applications
 - Advanced
 - Transaction Settings
 - Attachment Tracking
- XLIFF Configuration

ACCE Isolated Region Configuration

- Create/Configure Work Queues and Component Queues
 - Create Queue
 - Configure System and User Fields
 - Configure Indexes, Security, Operations, and In-Baskets
- Create/Configure Component Queue Adapters
 - Java and JMS component
 - Legacy Java and JMS component upgrade
- Create/Configure Rosters
- Create/Configure Event Logs
- Create/Configure Application Spaces
 - Configure Roles
 - Configure Custom Attributes

ACCE Isolated Region Configuration

- Existing PCC Functionality Not Implemented in ACCE
 - Export to XML (functionality moved to FDM)
 - Import to XML (functionality moved to FDM)
 - UDDI (deprecated)
 - WSRR (deprecated)

Product Demonstration

Demonstration

Process Configuration Console Functions added to ACCE

For more information, see the **Managing the workflow system** topic:

Knowledge center link:

http://www.ibm.com/support/knowledgecenter/SSNW2F_5.2.1/com.ibm.p8.ce.admin.tasks.doc/p8pcc272.htm

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Product Implementation Training (PIT)

Content Platform Engine 5.2.1 GA

Email Notification, Searches, Process Administrator Functions added to
ACCE, ICN Process Applets Plug-in and ACCE Plug-in



Overview

- ACCE - CE Email notification support
- Searches in ACCE
- Process Administrator applet functionality added to ACCE
- Process Configuration Console applet functionality added to ACCE
- CPE applets hosted in ACCE
- Process applets as an ICN plug-in
- ACCE as an ICN feature plug-in

ACCE – CE Email Notification Support

ACCE – CE Email Notification Support

- Configure email notifications for changes that occur for documents and folders in Object Store
 - Requires Social Collaboration Notification Extensions for Content Navigator add-on
 - Requires Email Services Extensions add-on

Important: *Email notification for document and folder changes requires a client application that implements the Social Collaboration Notification Extensions for Content Navigator add-on feature. Typically, a client that supports the notifications feature will install the add-on automatically as part of deploying and configuring the application, or the application's documentation will direct you to install the add-on. Do not install the add-on unless you are using a client that implements this feature.*

ACCE – CE Email Notification Support (cont.)

■ SMTP Subsystem Configuration

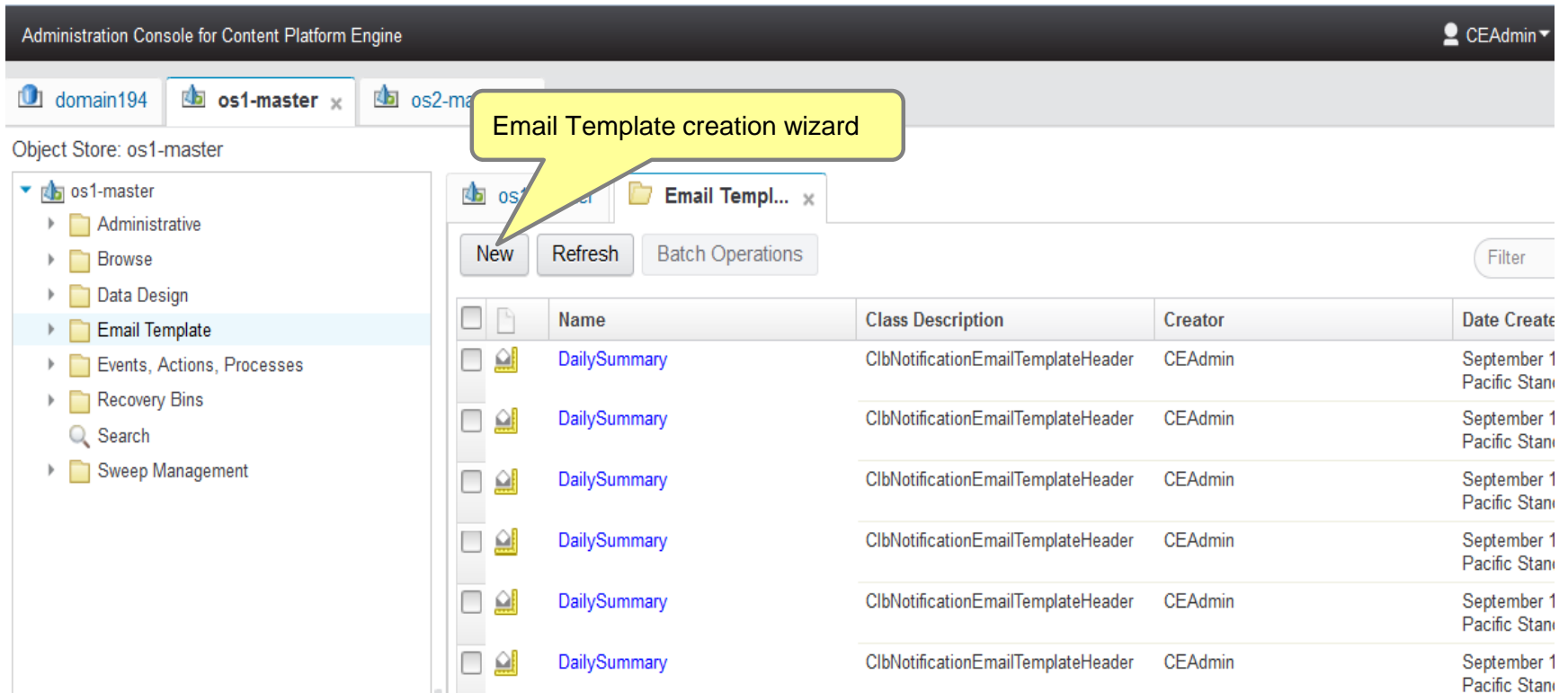
- Specify the SMTP server, default user, and other parameters that are used for email notification
- These SMTP settings can also be reused by a Workflow System (on the Remote Servers tab)

The screenshot displays the 'Administration Console for Content Platform Engine' interface. The top navigation bar includes the user 'pwtestadmin', a menu icon, a help icon, and the IBM logo. Below the navigation bar, the 'P8Domain' and 'CEMPOS' tabs are visible. The left sidebar shows a tree view of the domain structure, with 'CEMPOS' selected under 'Object Stores'. The main content area is titled 'Domain: P8Domain' and features a 'Save' and 'Refresh' button. A tabbed interface at the top of the main area shows 'Content Conversion Subsystem', 'CFS Import Agent Subsystem', 'SMTP Subsystem' (highlighted with a green box), and 'Workflow Subsystem'. Below the tabs is an 'Import Settings...' button. A descriptive text states: 'The settings that configure email notification for this object store.' An 'Important' note follows: 'Do not modify any values unless an IBM support representative specifically instructs you to do so. Improper modification of a value can adversely affect system performance and functionality.' The 'Email Services' section contains a checkbox for 'Enable email services' (unchecked) and several input fields: 'SMTP host' (cm-newportvm28), 'SMTP port' (25), 'Email from ID' (testuser@cm-newportvm28.usca.ibm.com), 'Default email reply-to ID' (testuser@cm-newportvm28.usca.ibm.com), and 'Email login ID' (testuser@cm-newportvm28.usca.ibm.com). The 'Email login password' field is masked with dots. The 'SSL Communication' section at the bottom has a checked checkbox for 'Enable SSL'.

ACCE – CE email Notification Support (cont.)

■ Email Templates

- EmsEmailTemplate object (subclassed from AbstractPersistable)
- Email templates (content and format) are very specific to the consumer's use-case



Administration Console for Content Platform Engine

domain194 os1-master os2-master

Object Store: os1-master

os1-master

- Administrative
- Browse
- Data Design
- Email Template
- Events, Actions, Processes
- Recovery Bins
- Search
- Sweep Management

Email Template creation wizard

New Refresh Batch Operations

	Name	Class Description	Creator	Date Create
<input type="checkbox"/>	DailySummary	ClbNotificationEmailTemplateHeader	CEAdmin	September 1 Pacific Stan
<input type="checkbox"/>	DailySummary	ClbNotificationEmailTemplateHeader	CEAdmin	September 1 Pacific Stan
<input type="checkbox"/>	DailySummary	ClbNotificationEmailTemplateHeader	CEAdmin	September 1 Pacific Stan
<input type="checkbox"/>	DailySummary	ClbNotificationEmailTemplateHeader	CEAdmin	September 1 Pacific Stan
<input type="checkbox"/>	DailySummary	ClbNotificationEmailTemplateHeader	CEAdmin	September 1 Pacific Stan
<input type="checkbox"/>	DailySummary	ClbNotificationEmailTemplateHeader	CEAdmin	September 1 Pacific Stan

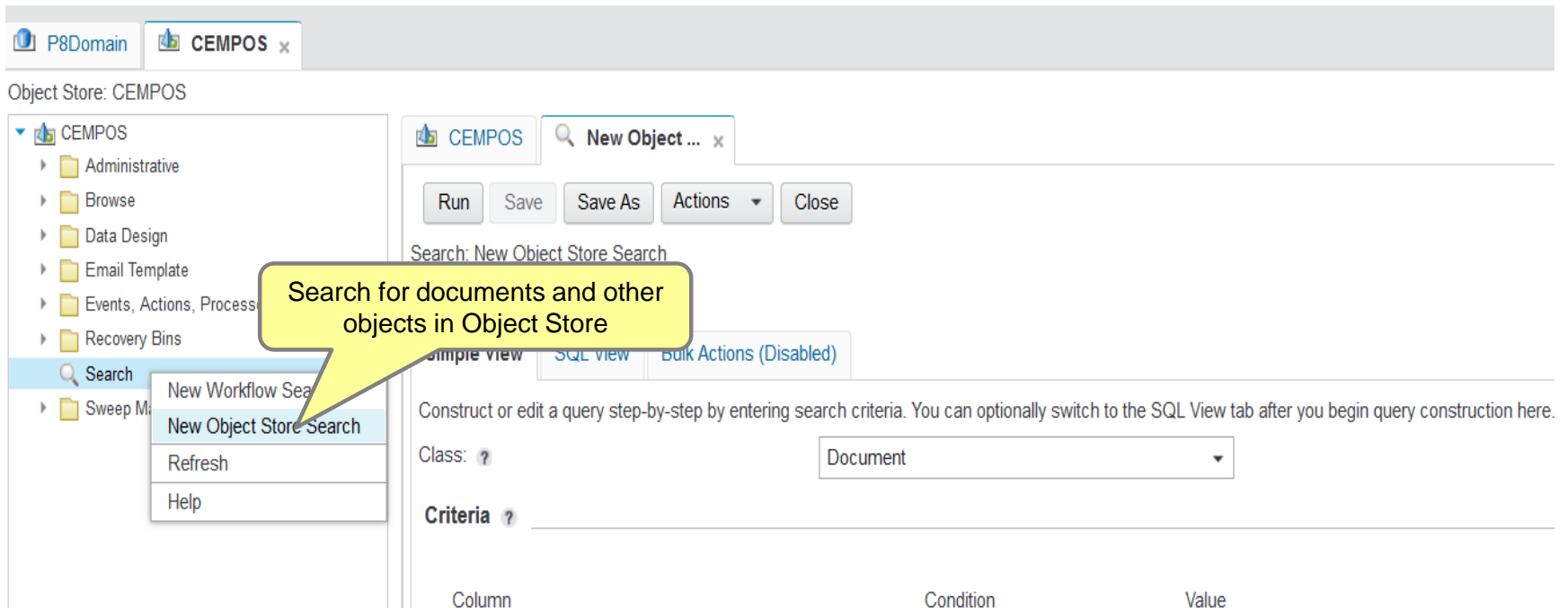
ACCE – CE email Notification Support (cont.)

■ Email Template Wizard

Searches in ACCE

Object Store Searches in ACCE

- From the Object Store's Search node:
 - Criteria can be specified either in Simple View or SQL view



Object Store Search Results

- From the search results, users can apply actions to them.

The screenshot displays the 'Administration Console for Content Platform Engine' interface. The top navigation bar includes the user 'pwtestadmin', a menu icon, a help icon, and the IBM logo. Below the navigation bar, the 'Object Store: CEMPOS' is selected, and a left-hand navigation pane shows a tree structure with 'Search' highlighted. The main content area shows a 'New Object ...' window with tabs for 'Simple View', 'SQL View', 'Bulk Actions (Disabled)', and 'Search Results'. The 'Search Results' tab is active, displaying a table of search results. Above the table, there is a search bar with the text 'Search: New Object Store Search' and a 'Run' button. Below the search bar, there is a section for 'Actions' and a long SQL statement. The table has five columns: 'Document Title', 'Class Description', 'Classification Status', and 'CmFederated'. The first three columns are visible, and the fourth is partially visible. The table contains three rows of data.

Administration Console for Content Platform Engine

P8Domain CEMPOS x

Object Store: CEMPOS

CEMPOS New Object ... x

Run Save Save As Actions Close

Search: New Object Store Search

Simple View SQL View Bulk Actions (Disabled) Search Results x

Actions

SQL statement: SELECT TOP 500 [This], [ClassDescription], [ClassificationStatus], [CmFederatedLockStatus], [CmIndexingFailureCode], [CmIsMarkedForDeletion], [CmRetentionDate], [ComponentBindingLabel], [CompoundDocumentState], [ContentRetentionDate], [ContentSize], [Creator], [CurrentState], [DateCheckedIn], [DateContentLastAccessed], [DateCreated], [DateLastModified], [DocumentTitle], [EntryTemplateId], [EntryTemplateLaunchedWorkflowNumber], [EntryTemplateObjectStoreName], [Id], [IgnoreRedirect], [IndexationId], [IsCurrentVersion], [IsFrozenVersion], [IsInExceptionState], [IsReserved], [IsVersioningEnabled], [LastModifier], [LockOwner], [LockTimeout], [LockToken], [MajorVersionNumber], [MimeType], [MinorVersionNumber], [Name], [Owner], [PublicationInfo], [ReservationType], [StorageLocation], [VersionStatus] FROM [Document] OPTIONS(TIMELIMIT 180)

	Document Title	Class Description	Classification Status	CmFederated
	Sequential Approval Workflow	Workflow Definition	0	
	ForCheckInOutDoc3	Document	0	
	VisioWF	Workflow Definition	0	

Process Administrator Applet Functionality added to ACCE

Work Item or Event Searches in ACCE

- From the Object Store's Search node (or Legacy Workflow System's Search node):

Object Store: CEMPOS

Search for work items and events in workflow database

Search Parameters

[Learn more...](#)

Connection point: WSCConnP1

Search result type: Work Items

Workflow structure: Workflow roster

Workflow structure name: CustomRoster

Selected index: <default> [Set index search criteria...](#)

Page size: 50 search results

Search mode: ☐ Read-only [?](#)

Search filter entry: ☐ Manual [?](#)

Search Filter: General Criteria [?](#)

Column	Condition	Value
A	<none>	<none>

Work Item Search Results

Administration Console for Content Platform Engine

pwtestadmin

P8Domain CEMPOS

Object Store: CEMPOS

- CEMPOS
 - Administrative
 - Browse
 - Data Design
 - Email Template
 - Events, Actions, Processes
 - Recovery Bins
 - Search**
 - Sweep Management

CEMPOS Workflow Sy... WSReg-01 New Workflo...

Run Count Matches Close

Search: New Workflow Search

Search Parameters Search Results

Search filter: <none>

Refresh Actions Previous Page Next Page Filter

Row				F_WobNum	F_Originator	F_WorkFlowNumber	F_StartTime
1				00B2D6F7C4B6E848ADE3CE96	50 (pwtestadmin)	C2F6CEAABF89234EACFA065A	Mon Sep 15 (Pacific Stan
2				01BA3FEFAB76E44C8141AF39	364 (pwtest8)	DC0E0477F44E6E48A129BF03	Tue Sep 16 (Pacific Stan
3				022A41D8FF029040801A782DD	50 (pwtestadmin)	16696A02ADE4094A9610A40C6	Tue Sep 16 (Pacific Stan
4				026E5140FF9C604499E68C754	50 (pwtestadmin)	026E5140FF9C604499E68C754	Tue Sep 16 (Pacific Stan
5				02A173248DDCA44A8C1D20A2	50 (pwtestadmin)	948CE760CA1E05438595EFE9F	Sat Sep 20 (Pacific Stan

ACCE - Process Administrator Applet Functionality

- Lock/Unlock work
- Edit workflow fields
- Manage workflow groups
- Assign or Reassign work
- Complete work
- Terminate work
- Unlock work by users or queues
- Change the Out-of-office settings for a user
- View information stack

Process Configuration Applet Functionality added to ACCE

Workflow System: Logging Flag for Proxy User Assignment

- Located in Isolated Region's Event Logging Options tab

The screenshot displays the IBM Enterprise Content Management console. The left sidebar shows the 'Object Store: CEMPOS' with a tree view where 'Workflow System' is selected. The main panel shows the 'Isolated Region: WSReg-01' configuration. The 'Event Logging Options' tab is active, displaying a list of event categories. The 'Reassign to proxy user' checkbox is highlighted with a green box. A tooltip is visible over this checkbox, explaining the event category.

Object Store: CEMPOS

CEMPOS Workflow Sy... WSReg-01

Save Refresh Actions Close

Isolated Region: WSReg-01

General Properties Table Spaces Connection Points **Event Logging Options** Step Processors We

Event logging options determine whether the workflow system generates a message when certain system-level events occur within the isolated region. Each option represents an event category. [Learn more...](#)

System Messages

☐ System message ?

Work Item Messages

☒ Empty / System step completion ? ☒ Termination ?

☐ Rules ? ☒ Exception ?

☒ Milestones ? ☒ Administration message ?

☒ Trace instruction ? ☒ Begin operation ?

☒ Creation ? ☒ End operation ?

☐ Reassign to proxy user ?

User-Defined Messages

☒ User-defined message set 1 ? ☒ User-defined message set 2 ?

An event logging category that includes the following event: 105, VW_WORReassignToProxy: When work objects are reassigned to a proxy user.

Workflow System: XLIFF Support

- Used to translate user-defined strings
- Located in Isolated Region's XLIFF Configuration tab
 - Create a new XLIFF definition to the Process Engine database
 - Delete an existing XLIFF definition from the Process Engine database
 - Upload a local XLIFF file to the Process Engine database
 - Download an XLIFF definition from the Process Engine database to local file

Workflow System: XLIFF Support (cont.)

Administration Console for Content Platform Engine

pwtestadmin

P8Domain CEMPOS

Object Store: CEMPOS

- CEMPOS
 - Administrative
 - Audit Disposition
 - Index Areas
 - Index Jobs Manager
 - Index View
 - Indexing Queue
 - Publishing Queue
 - Replication Queue
 - Security Policies
 - Storage
 - Workflow System
 - Connection Points
 - Isolated Regions
 - Browse
 - Data Design
 - Email Template
 - Events, Actions, Processes

CEMPOS Workflow Sy... WSReg-01

Save Refresh Actions Close

Isolated Region: WSReg-01

Connection Points Event Logging Options Step Processors Web Applications Advanced **XLIFF Configuration**

Create an XLIFF file so that users can view user-authored items, such as step responses, field names, and milestone names, in their current locale. XLIFF is an XML-based file format that provides a standard format for information to be globalized into a specific language.

When you create an XLIFF definition, you specify a language that the file will be translated to. Download the source file and use an external tool to translate the information in the file. Save the file to where you can access it from the administration console. Upload the translated file to a specific XLIFF definition.

New Delete Upload Download

Locale Display Name	Locale Code
<input checked="" type="radio"/> French (France)	fr_FR

CPE Applets hosted in ACCE

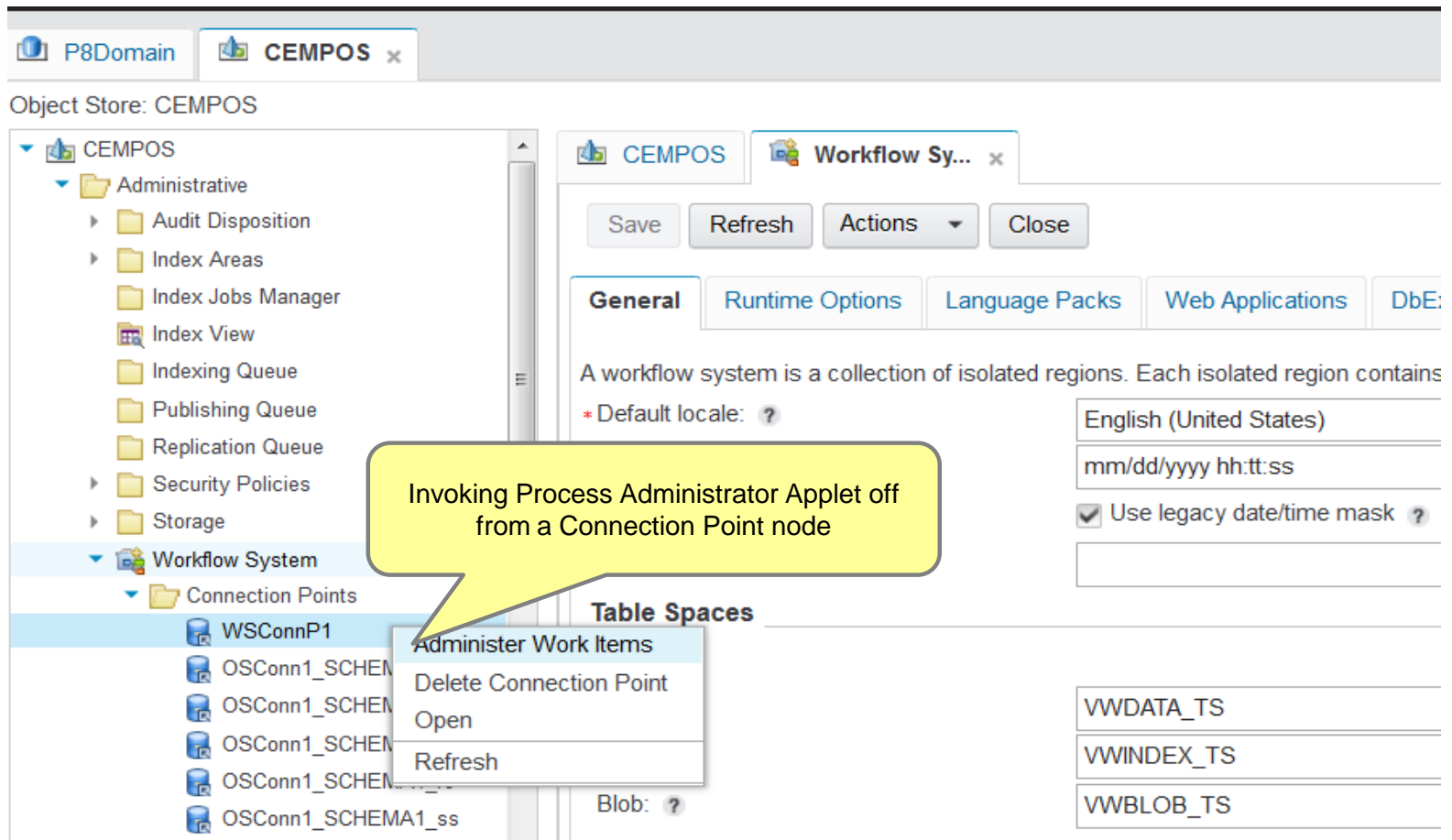
CPE Applets hosted in ACCE

- Process Configuration Applet
 - can be invoked from a Workflow System node

The screenshot displays the IBM ACCE (Advanced Content Configuration Environment) interface. The top navigation bar shows 'P8Domain' and 'CEMPOS'. The left sidebar lists the 'Object Store: CEMPOS' structure, including 'Administrative' (Audit Disposition, Index Areas, Index Jobs Manager, Index View, Indexing Queue, Publishing Queue, Replication Queue, Security Policies, Storage) and 'Workflow System'. The 'Workflow System' node is selected, and a context menu is open with the option 'Configure Workflow Settings' highlighted. A yellow callout bubble points to this menu item with the text: 'Invoking Process Configuration Applet off from the Workflow System node'. The main panel shows the 'Workflow Sy...' configuration page with tabs for 'General', 'Runtime Options', 'Language Packs', 'Web Applications', 'DbExecute Connections', 'Remote Servers', 'Isolated Regions', and 'Advanced'. The 'General' tab is active, displaying a description: 'A workflow system is a collection of isolated regions. Each isolated region contains the queues, rosters, and event logs that are necessary to create and process wo...'. Below this, there are input fields for 'English (United States)', 'mm/dd/yyyy hh:tt:ss', a checked 'Use legacy date/time mask' checkbox, and an 'XSL/XSD base directory' field. At the bottom, there are three text boxes labeled 'VWDATA_TS', 'VWINDEX_TS', and 'VWBLOB_TS'.

CPE Applets hosted in ACCE (cont.)

- Process Administrator Applet
 - can be invoked from a Connection Point node



Process Applets as an ICN Plug-in

Process Applets as an ICN '*Menu Actions*' Plug-in

- The Plug-in is implemented as an '*Menu Actions*' Plug-in, not '*feature*'.
- The Plug-in provides users the capability to:
 - Add an action menu to invoke Process Designer or Process Tracker applet
 - View workflow definitions using Process Designer (automatically override the “*Open*” action)

Register and Configure the Process Applets Plug-in

- Register the CPEAppletsPlugin.jar (packaged in peengine.war)
- Configure an ICN P8 Repository with a Connection Point
- Configure an ICN Desktop to use with the Process Applets
- Add the Process Designer action menu to the Desktop's menu (overriding the *Repository folder context menu* is recommended)
- Add the Process Tracker action menu to the Desktop's menu (overriding the *Tracker in-basket context menu*)

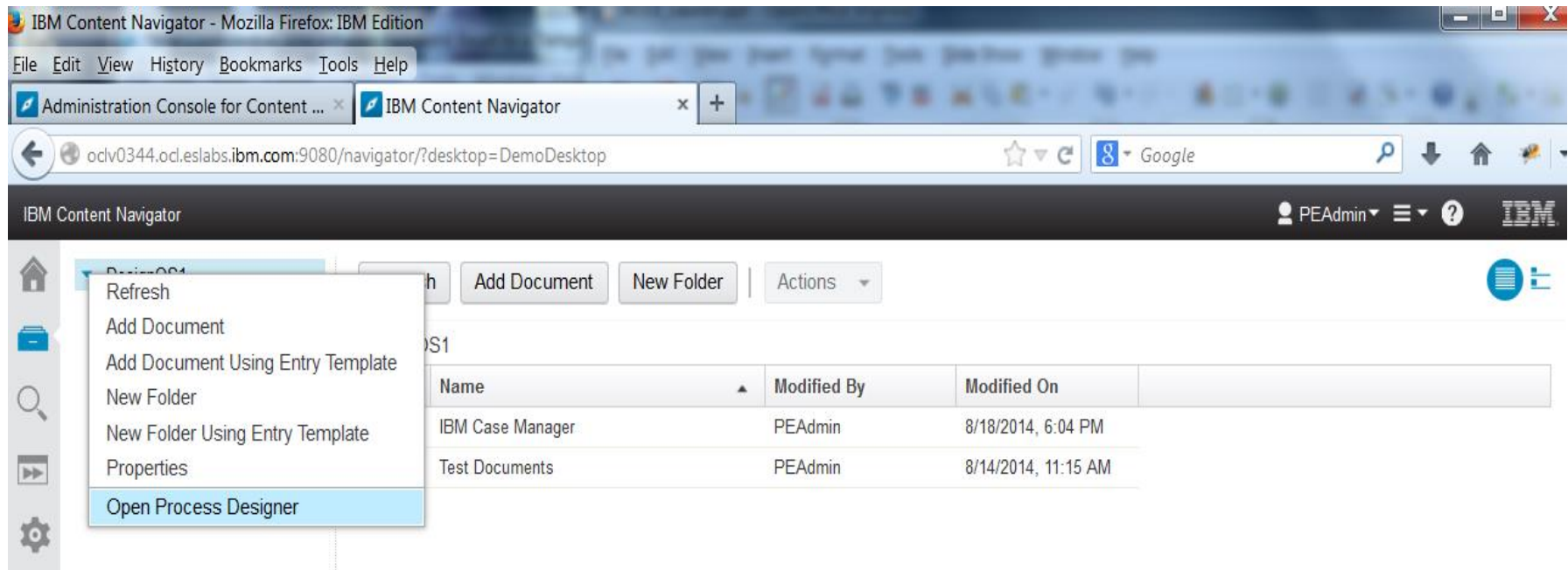
Note: Process Designer and Process Tracker use the connection point specified for the repository to access the isolated region.

Process Applets in ICN

- Process Designer and Process Tracker behave similarly to how they behave if they are opened from Workplace/WorkplaceXT
 - There are no Access Roles in ICN
 - Process Designer has the “Configuration” tab enabled if the logon user has Workflow Configuration rights
 - Process Designer has the “Configuration” tab enabled and also can open Process Administrator if the logon user has Workflow Administration rights
- Some Process Designer functionality is not available
 - Simulation Designer and Simulation Console / Simulation Animator functionality are not exposed (deprecated in 5.2.1)
 - The ability to “register” one or more custom step palettes is not supported, though users can still save them locally in Object Store

Launching Process Designer

- From the repository folder's "Open Process Designer" action menu



Launching Process Designer (cont.)

- From the workflow definition's "Open" action menu

The screenshot shows the IBM Content Navigator interface in a Mozilla Firefox browser. The address bar displays the URL: `oclv0344.od.eslabs.ibm.com:9080/navigator/?desktop=DemoDesktop`. The user is logged in as PEAdmin. The left sidebar shows a navigation tree with 'DesignOS1' expanded, containing 'IBM Case Manager' and 'Test Documents'. The main content area shows a table of documents under 'DesignOS1 > Test Documents'. The document 'LaurenWF1' is selected, and its 'Actions' menu is open, highlighting the 'Open' option. The 'Properties' panel on the right shows the document's details.

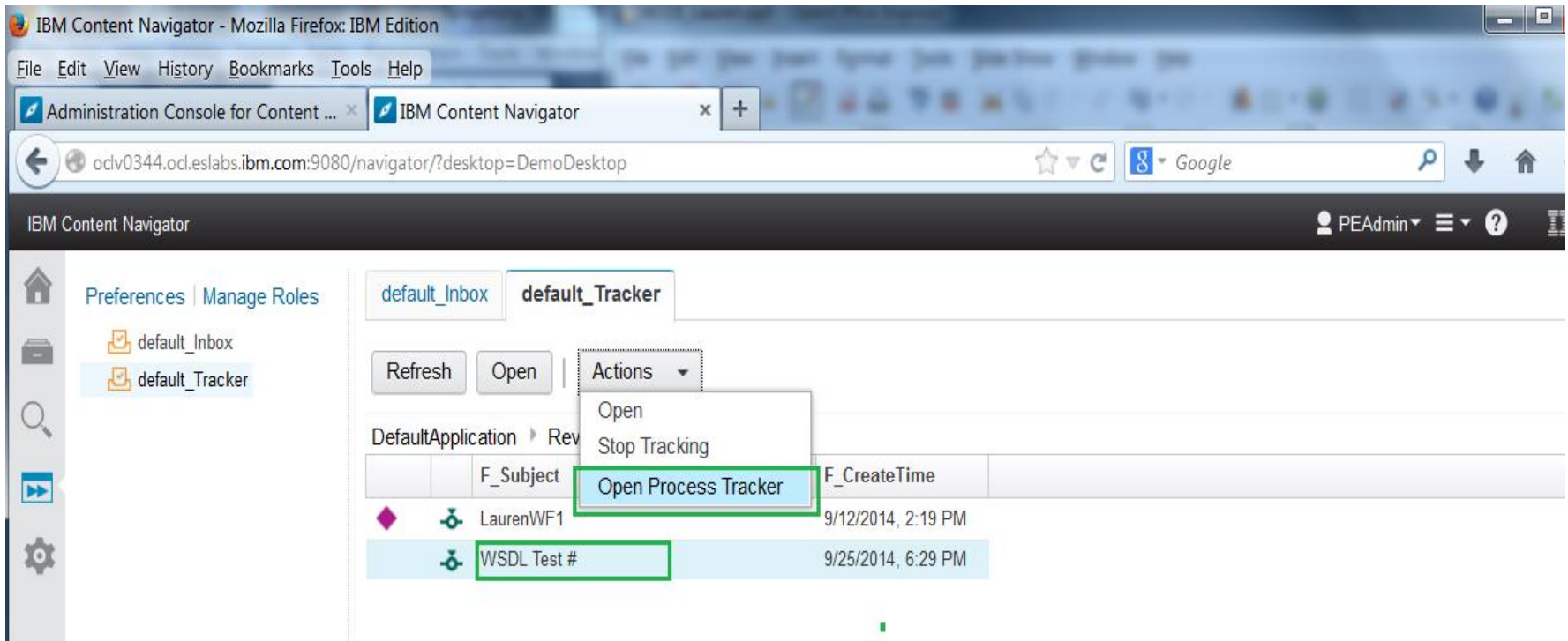
Name	Modified
LaurenWF1	9/15/2014,
Test Document	8/18/2014,

Properties	
Class:	Workflow Definition
Document Title:	LaurenWF1

System Properties

Launching Process Tracker

- From the Tracker work item's "Open Process Tracker" action menu



ACCE as an ICN feature Plug-in

ACCE as an ICN feature plugin

- ACCE is designed and implemented as an ICN plugin. It support two deployment mode
 - Co-deployment mode:

ACCE is bundled with CPE ear.

User have convenience to directly launch ACCE after CPE deployment and begin administration of CPE functions such as creating the domain and object stores.
 - Plugin-deployment mode:

ACCE is configured as an ICN feature plugin to an existing ICN deployment.

This mode allows users to easily access ACCE functionality along with other administrative tools using a single ICN desktop.

Note: The CPE applets are not available when ACCE is running as an ICN plug-in

ACCE as an ICN feature plugin

- **Configure ACCE as ICN feature plugin**
 - Configure ICN P8 repository
 - Configure ACCE as ICN plugin
 - Configure ICN desktop to have ACCE plugin feature available
 - The ACCE feature accesses the FileNet P8 domain that is associated with the Authentication Repository specified for the desktop.
 - Users of the Content Platform Engine Administration feature must have appropriate privileges for the object stores and workflow systems that are managed by the FileNet P8 domain.
- **Using ACCE feature plugin**
 - Launch ACCE by click ACCE feature icon from ICN navigation bar
 - Perform ACCE actions within ICN desktop

Email Notification, ICN Process Applets Plug-in

For more information on email notification, see the **Configuring email notifications for the FileNet P8 domain** topic:

Knowledge center link:

http://www.ibm.com/support/knowledgecenter/SSNW2F_5.2.1/com.ibm.p8.ce.admin.tasks.doc/p8pcc288.htm

For more information on Process applets as an ICN plugin, see the **Configuring the Process applets to run from IBM Content Navigator** topic:

Knowledge center link:

http://www.ibm.com/support/knowledgecenter/SSNW2F_5.2.1/com.ibm.p8.ce.admin.tasks.doc/p8pcc326.htm

ACCE plug-in for IBM Content Navigator

For more information, see the **Configuring the administration console as an IBM Content Navigator desktop feature** topic:

Knowledge center link:

http://www.ibm.com/support/knowledgecenter/SSNW2F_5.2.1/com.ibm.p8.ce.admin.tasks.doc/p8pcc241.htm

Process Administrator Applet Functionality added to ACCE

For more information, see the **Administering the workflow system** topic:

Knowledge center link:

http://www.ibm.com/support/knowledgecenter/SSNW2F_5.2.1/com.ibm.p8.ce.admin.tasks.doc/p8pcc259.htm

Course Roadmap

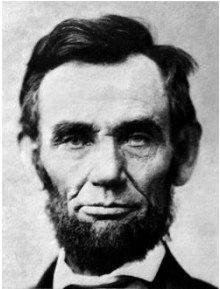
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Product Demonstration: ACCE and Process Applets plugins for ICN

Presented by Yvonne Santiago, ECM Development – CPE Tools

Goal: increase consumability of our products by having a "one user experience at the glass" even when multiple components are bundled to deliver a single product.

User scenario 1:



Lincoln, Case Manager and P8 administrator for the ABC Insurance company, wants to avoid numerous URLs to remember, having multiple browser tabs to manage, plus dealing with annoying login expirations when moving between tools. He decides to incorporate the administration tool **features** delivered as ICN **plug-ins** to create a single point of access.

User scenario 2:



Robin, the lead application developer for ABC Insurance, must create a POC for the managers of the application user groups showcasing the latest improvements. She augments her development environment to create a unified CPE developer tools desktop utilizing **menu actions** delivered as ICN **plug-ins**, increasing her productivity so she can meet her deadlines.

Questions

