

## Introduction to IBM FileNet P8 Platform

In this section, you will learn about the Enterprise Content Management (ECM) concepts, IBM FileNet P8 Platform features, integration options, and components.

### What is Enterprise Content Management?

An ECM system captures, stores, and manages business-related digital assets. ECM is also about:

- Supporting business applications
- Providing users with access to the right information in the context of their application
- Governing information and ensuring you meet business or industry regulations
- Enabling businesses to support a wide-range of document-centric use cases

Enterprise Content Management software provides the following set of core capabilities:

- User interfaces for working with the content
  - Metadata management to enable searching and categorizing
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- Security to ensure that only people with the correct access can view, edit, or delete documents
  - API and programming model for the development of custom solutions
  - Event management to automate actions based on events, such as document or metadata creation or updates
  - Workflow management to automate document approval
  - Records and retention management to govern information and ensure that you can meet business and industry regulations
  - Logging and reporting to provide required audit trails
  - Tools with which to administer the ECM environment

## **IBM FileNet P8 Platform features**

IBM FileNet Content Manager is an Enterprise Content Management offering. IBM FileNet Content Manager is also included in other product offerings and is referred to as IBM FileNet P8 Platform. Content Platform Engine (CPE) is the core component of the IBM FileNet P8 Platform. This course uses both IBM FileNet P8 Platform and IBM FileNet Content Manager interchangeably.

IBM FileNet P8 Platform provides the enterprise-level capabilities that are required for solving critical business requirements. The platform contains the following features:

- **Content Management**

Repository services for capturing, managing, and storing your business-related digital assets form the core of the platform. Multiple repositories, called object stores, can be created and managed within a single system to serve your business requirements.

Object stores can be configured to store content in a database, a file system, cloud storage, or a fixed content device, or a combination of these options.

- **Business user environment**

IBM Content Navigator (ICN) is a web client that provides users with a console for working with content from multiple content servers, including content that is stored on Content Platform Engine object stores. ICN can be used with IBM Content Manager (CM8), IBM Content Manager OnDemand (CMOD), any CMIS-compliant repository, and Box.

- **Application environment**

IBM FileNet P8 Platform provides a rich set of APIs that enable you to build custom applications, as well as tailor the out of the box interface ICN.

- **System management**

It provides a complete set of system administration tools.

- **Workflow management**

You can create, modify, and manage business processes, or workflows in the IBM FileNet P8 Platform.

## **IBM FileNet P8 Platform integration options**

The IBM FileNet P8 Platform provides the baseline components, for enterprise content management (ECM) solutions, that address ECM and business process management requirements.

IBM FileNet P8 Platform is included in other product offerings.

The following components can be added to a system to enable additional capabilities:

- **IBM Datacap**

A data capture product that scans, classifies, recognizes, validates, verifies, and exports data and document images quickly, accurately and cost effectively. Datacap can be used to automate the import of captured data and scanned documents from Datacap into the IBM FileNet P8 Platform repositories for storage and use in other business applications.

Datacap Navigator is integrated with IBM Content Navigator to give business users a consistent user interface in which to work.

- **IBM Enterprise Records**

IBM Enterprise Records creates and maintains accurate, secure, and reliable records for both electronic and physical information. These records help to place the documents under corporate control and to meet government regulations.

The IBM Enterprise Records administrative interface is integrated with IBM Content Navigator, and while the processing of documents as records can be automated, business users can also declare documents as records using the IBM Content Navigator interface.

- **IBM Business Automation Workflow**

IBM Business Automation Workflow (BAW) provides a platform to create workflow applications to improve productivity.

BAW provides:

- Tools that simplify designing and deploying business solutions
- A ready-to-use interface that is flexible and customizable
- An active-content infrastructure that manages the persisted case object model
- Rich analytics that provide several methods to track and measure workflow business performance
- Ability to identify and incorporate both structured and unstructured content into workflows

- **IBM FileNet Content Federation Services**

IBM FileNet Content Federation Services federate documents from multiple repositories. The documents remain in the source repository; but can be viewed as if they were native FileNet P8 documents.

Examples of supported source repositories include IBM Content Manager and Image Services.

For a complete list of supported repositories, refer to the IBM FileNet P8 Platform V5.5.x Knowledge Center.

## **IBM FileNet P8 Platform components**

The IBM FileNet P8 Platform includes the following components.

- **Content Platform Engine (CPE)**

CPE is the core component of IBM FileNet P8 Platform that provides both content and process services.

Throughout this course, you will be learning about CPE configuration.

- **IBM Content Navigator (ICN)**

ICN is the primary web interface for business users to work with content. Users can browse or search for content in the repositories, access their work items, and set up special team rooms to coordinate and collaborate on content-related activities. ICN is highly customizable. Both IBM Datacap and IBM Enterprise Records can be used through the ICN interface.

IBM Content Navigator also provides:

- A sync service to synchronize content on a business user's desktop and the CPE repository
- An edit service that enables business users to open content directly in the appropriate authoring application
- Role-based redaction to ensure sensitive information in a document is viewed only by the appropriate users
- An integration with Microsoft Office that enables users to access, add, and update content in the CPE repository from the Microsoft Office suite of products
- An integration with Microsoft SharePoint that enables SharePoint users to access content in the CPE repository and to automatically save content added to SharePoint in the CPE repository

- **Content Search Services (CSS)**

CSS provides full content indexing so that text searches can be performed on both document content and metadata.

- **System Dashboard**

The system dashboard can be used to monitor the performance of the servers hosting IBM FileNet P8 Platform components. It also provides a tool for tracking license usage.

## **IBM FileNet P8 Platform solutions**

IBM FileNet P8 Platform provides tools for building solutions and applications that address business needs and challenges in various industries such as banking, academia, and government agencies.

Usually, a solution includes the following elements:

- **Metadata**

Metadata is information about objects, whether they are documents or other kinds of business objects. The metadata classifies the information so that users can find objects, and so that appropriate automated actions can be taken as metadata values are updated.

- **Content storage**

The content of documents needs to be stored securely. The rules around where content should be stored, whether the content should be encrypted, and how long the content should be kept for can be configured easily. Tools are also provided that enable you to move content to different types of storage as part of managing the lifecycle of the document.

- **Searches**

Searches can have a considerable effect on system performance. When designing a solution, a solution builder needs to predict the kinds of searches that are going to be used and create searches to efficiently use the system resources.

- **Security**

There are two primary aspects to securing your system: authentication and authorization.

Authentication determines who has access to the system, while authorization determines what the user can do once they have accessed the system.



- **User interface options**

IBM Content Navigator (ICN) can be used as the start point for your user experience. ICN can be customized and extended by using plug-ins. You can also embed ICN within your own completely custom user interfaces.

- **Automation**

Take advantage of the capabilities within the platform to automate repetitive processes that do not need user interaction. Automation can also be used to trigger processes based on adding or updating content or metadata.

- **Integration**

The IBM FileNet P8 environment can be integrated with other business processes and applications.

### **Review Questions**

**Question 1:** How would you define an IBM FileNet P8 Platform solution? (Select one)

- A. An object store that contains folders and files
- B. A set of workflows
- C. A solution that addresses a business need
- D. A set of stored searches

**Answer 1:** C

IBM FileNet P8 Platform provides tools for building a solution or application that addresses a business need.

**Question 2:** IBM FileNet P8 Platform is commonly used by which industry? (Select one)

- A. Banking
- B. Academia
- C. Government agencies
- D. All of the above

**Answer 2:** D

IBM FileNet P8 Platform is used by many industries.

**Question 3:** What are the capabilities of an Enterprise Content Management system? (Select all that apply)

- A. Providing users with access to the right information
- B. Metadata management to enable searching
- C. Logging and reporting to provide required audit trail
- D. Document viewing

**Answer 3:** A, B, C, and D

An Enterprise Content Management system provides user access & metadata management, logging, auditing, and document viewing.

**Question 4:** Which IBM FileNet P8 Platform component provides the default client interface for business users to work with content? (Select one)

- A. IBM Content Navigator
- B. Content Search Services
- C. Content Platform Engine
- D. System Dashboard

**Answer 4:** A

IBM Content Navigator is the primary web interface for business users to work with content and it can connect to the IBM FileNet Content Manager repositories.

**Question 5:** IBM FileNet P8 Platform integrates with which of the following systems? (Select all that apply)

- A. IBM Datacap
- B. IBM Enterprise Records
- C. IBM Business Automation Workflow
- D. IBM FileNet Content Federation Services

**Answer 5:** A, B, C, and D

IBM FileNet P8 Platform integrates with IBM Datacap, IBM Enterprise Records, IBM Business Automation Workflow, and IBM FileNet Content Federation Services.