Introduction to IBM FileNet P8 Platform

Unit objectives

- In this section, you will learn about the Enterprise Content Management (ECM) concepts

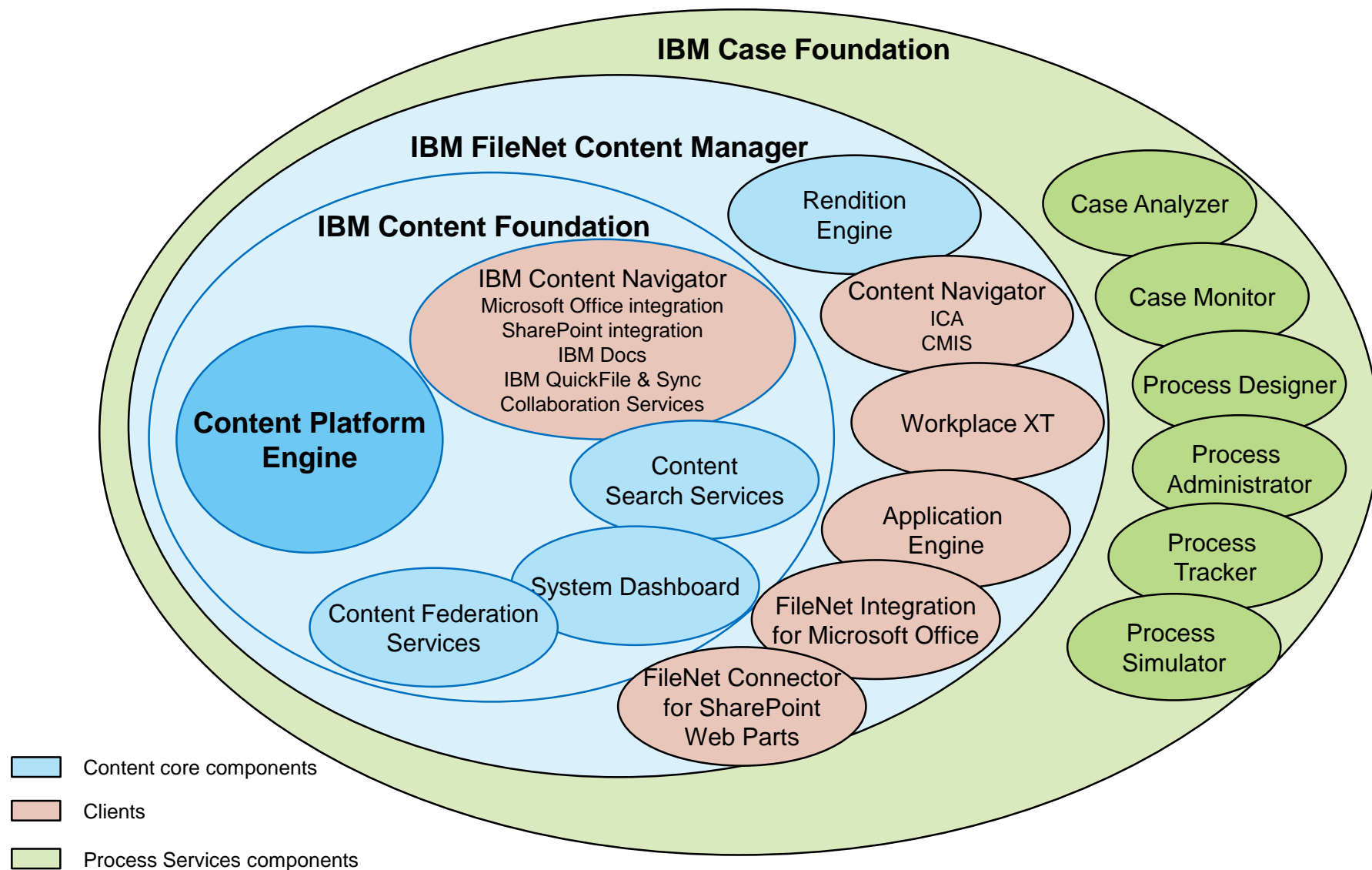- IBM FileNet P8 Platform features, integration options, and components.

What is Enterprise Content Management?

- Enterprise Content Management (ECM) is more than storing and managing documents.

- ECM is 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.

- ECM solutions enable businesses to support a wide-range of document-centric use cases.

ECM Core Capabilities

User Interface	Records Management
Metadata Management	Logging/Reporting
Security	Event Management
API & Programming Model	Viewing & Publishing
Workflow Management	Document Transformation
Capture	Administration

FileNet P8 Platform product bundles

IBM Case Foundation

IBM FileNet Content Manager

IBM Content Foundation

Rendition Engine

IBM Content Navigator
Microsoft Office integration
SharePoint integration
IBM Docs
IBM QuickFile & Sync
Collaboration Services

Content Navigator
ICA
CMIS

Content Platform Engine

Content Search Services

Workplace XT

System Dashboard

Application Engine

Content Federation Services

FileNet Integration for Microsoft Office

FileNet Connector for SharePoint Web Parts

Case Analyzer

Case Monitor

Process Designer

Process Administrator

Process Tracker

Process Simulator

Content core components

Clients

Process Services components

Features

- Content management
- Integration with external repositories
- Workflow management
- Application environment
- Application integration
  - Microsoft Office
  - SAP
  - FileNet Collaboration Services
  - SharePoint
- Records management
- System management

FileNet P8 Platform integration options

- IBM Datacap
- IBM Enterprise Records
- IBM Case Manager
- IBM Content Collector
- IBM Content Collector for SAP
- IBM Content Federation Services
  - For Content Manager OnDemand
  - For Image Services
  - For Content Integrator

- Integration options available through IBM Content Navigator
  - IBM FileNet Collaboration Services
    - IBM Connections
  - IBM CMIS for Enterprise Content Management
  - Microsoft Office integration
  - SharePoint integration
  - IBM Docs
  - IBM QuickFile
  - Sync services

Social capabilities

- IBM Content Navigator > IBM FileNet Collaboration Services.
- Connects a content repository to IBM Connections
  - Social collaboration
    - User comments on managed objects
    - Social tagging of managed objects
    - Tracking document downloads
    - Document recommendations
    - Document thumbnails
    - Document recovery bin
  - Searching
  - Document management capabilities for IBM Connections communities

IBM FileNet Content Manager solutions/applications

- What is an IBM FileNet Content Manager solution?
  - A solution that addresses a business need.
  - Involves managing content, processes, and applications.
  - Improves efficiency and compliance.

- IBM FileNet Content Manager provides the tools to build an Enterprise Content Management solution.
  - Metadata: Classes, properties
  - Content storage
  - Efficient searches
  - Security
  - User interface options
  - Automation
  - Integration

Examples of business needs addressed with IBM FileNet Content Manager

Banking

Universities

Government agencies

Bank: Business need

- The Asset and Wealth Management division of a bank:
  - Over 150 content repositories and related systems across the globe
  - Each repository has its own taxonomy
  - Over 15 technologies used
  - Costs a substantial amount to operate annually
- The Sales and Marketing teams struggle to:
  - Find the correct version of a document.
    - Multiple versions are filed in multiple locations.
  - Prove which version of a document is provided to a client.
  - Prove that proper compliance was approved, relevant, or suitable.

Solution

- Deploy IBM FileNet Content Manager to provide:
  - Scalable, secure, auditable repository
    - Used to upload compliance approved documentation
- Document upload performed by authorized users through IBM Content Navigator that uses:
  - External Data Services to dynamically create lists to choose from to populate document properties.
    - The lists are created from an external database, populated with accurate data.
    - Creates a common taxonomy
- Sales and Marketing use an IBM Content Navigator iPad app to search the repository for documentation.
- IBM Content Collector is used to integrate with an existing bank repository.
  - When a document is published in the existing repository, that document is ingested into the FileNet Content Manager repository.
    - Providing a gradual migration of the existing repository to the new centralized repository.

Benefits

- One place to look for product and solutions documentation.
- Guarantee that the content is compliance approved before making it available to users.
- Traceability of the use of the content.
- Reduced operational costs through consolidation of platforms.
- Automated management of the expiry of documents and reminders to upload new versions.
- Configurable security to prevent access when products are withdrawn.

University: Business need

- An accurate and efficient method to ingest various documents types from multiple departments into a centralized location.
- During ingestion, documents need to be indexed with appropriate metadata and stored with appropriate content.
- Security must be automatically assigned based on the document type.
- After ingestion, the documents need to be accessible and searchable by multiple departments.

Solution

- Use IBM Datacap to ingest the documents into an IBM FileNet Content Manager repository.
  - Datacap:
    - Automatically captures the metadata from the documents and stores it into the repository with the document's content.
  - A custom workflow does a periodic check for documents that require indexing.
    - Verifies that the metadata is present and valid.
    - Indexes the documents and assigns them to document classes, based on predefined business rules.
    - Moves the documents to a queue for user input.
    - If any metadata is missing or invalid, the work items are routed for manual user indexing.
  - Search templates created to facilitate searching/retrieval of documents.

Benefits

- Provides a consistent method to ingest and index documents to a centralized document management system.
- Improves accuracy and efficiency of the ingesting process.
- Supports moving away from paper filing practices.
- Ensures ability to locate and retrieve documents.
- Provides document retention mechanism.

Government agency: Business need

- Replace existing outdated solution with new solution that provides:
  - Centralized architecture capable of supporting all supporting government agencies, managed by a single service center.
  - The functional needs of:
    - Accounts Payable
    - Credit Card Services
    - Purchasing change requests
  - Scalable Document capture solution that supports OCR.
    - Efficient Document capture
    - Support multiple input sources:
      Paper scanning

      Email

      Folders/network file shares
  - Meet government agency standards in the client application.

Solution:

- Government agency implemented a custom solution built on IBM FileNet Content Manager.

Benefits

- Automated Credit Card requests for new card holders, changes, and renewals.
- Automation of requests for Purchase Order change notices.
- Adds interface between Accounts Payable and Purchase Orders.
- Increases capacity and throughput to support all agencies.
- Visibility to monitor the status of transactions.
- Provides platform for a record retention repository.
- Increases Accounts Payable scanning and indexing capacity by 100%.
- Consolidates all documents into one place for increased efficiency.

Unit summary

- Identify core components of IBM FileNet Content Manager.
- Identify content management capabilities.
- Describe how IBM FileNet Content Manager can be used to address business needs in different industries.

Review questions

1. True or False: Enterprise Content Management is storing and managing documents.

2. Which of the following features is not an IBM FileNet Content Management feature?
   A. Records management
   B. Application integration
   C. Workflow management
   D. Sync and Share

3. Which of the following integration options is provided by IBM Content Navigator?
   A. IBM Connections
   B. IBM Content Collector
   C. IBM Enterprise Records
   D. IBM Case Manager

Review questions

4. IBM FileNet Content Manager is commonly used by which industry?
    A. Banking
    B. Academia
    C. Government agencies
    D. All of the above

5. How would you define an IBM FileNet Content Manager solution?
    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.

Review answers

1. True or <u>False</u>: Enterprise Content Management is storing and managing documents.
   The answer is <u>False</u>.

2. Which of the following features is not an IBM FileNet Content Management feature?
   A. Records management
   B. Application integration
   C. Workflow management
   D. <u>Sync and Share</u>
   The answer is <u>D</u>.

Review answers

3. Which of the following integration options is provided by IBM Content Navigator?
    A. IBM Connections
    B. IBM Content Collector
    C. IBM Enterprise Records
    D. IBM Case Manager
    The answer is: A.

4. IBM FileNet Content Manager is commonly used by which industry?
    A. Banking
    B. Academia
    C. Government agencies
    D. All of the above
    The answer is: D.

Review answers

5. How would you define an IBM FileNet Content Manager solution?
    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.
    The answer is: C.