
FileNet P8 Use Cases

How to Use FileNet P8 Content in WSM 4

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1 Purpose

This document describes how to access the FileNet P8 repository from WSM. This document applies only if you connect WSM to a FileNet P8 repository. If you use WSM separately, you cannot access the functions described here.

2 Security

WSM can access the same central user management infrastructure (LDAP) as P8. This means that the same user accounts are valid in WSM and in P8. In WSM, the user's access rights determine which pages they are allowed to see, and which authoring rights they have. To use P8 content in WSM, a user must have the respective access rights both in WSM to the WSM page and in P8 to the embedded content. For example, to create a page that features a P8 document download, the user must have WSM authoring rights, must be allowed in WSM to create and edit pages, and must have view rights to the P8 document.

In general, there are three types of users:

Authors

Authors can create and edit Web site content, and they can enable P8 content for download. The author's access rights determine which WSM content they can access and edit, and which P8 documents they can enable for download.

Note that an author can enable a file for download that some users are not allowed to see. In this case, WSM does not display the file for these users.

Identified Users

For an identified user (logged into WSM), WSM uses the user's P8 access rights to determine if they can see and download P8 content. This allows you to restrict access rights in an Intranet, Extranet or for a protected section of the Internet site.

Anonymous WSM Users

The access rights of the guest account in the connector determines the content that is visible to a user who has not logged in, such as a visitor on a public Web site.

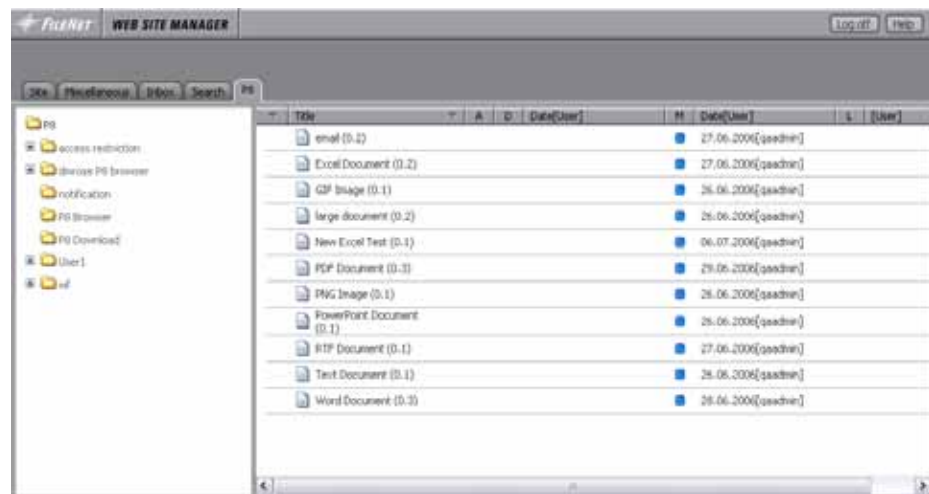
If the guest user has full access to the P8 repository, this means that authors are free to enable any file for download. With more narrow access rights, WSM restricts the files it allows anonymous WSM users to download.

3 Browsing P8 Documents

The P8 browser allows authors to browse the P8 repository from within WSM, to see the properties of documents stored in P8, and to download the documents.

Note: Visitors of a Web site cannot use the browser. It is a tool for authors and developers. You need to be a member of the **P8 Author** group to see it.

3.1 Accessing the P8 Browser



To access the P8 browser, proceed as follows:

1. Log in to the WSM authoring environment.
2. Click the **P8** tab.

3.2 Accessing a Document Page

FILENET	WEB SITE MANAGER
New Excel Test	
test.xls	13.5 kB
Folders Filed In	
/etc/medialib/filenet/p8:Root/P8 Browser Test	
Show System Properties	

In the P8 browser, click a document icon to access the document page. This page displays information about the document, and allows you to download it.

3.3 Downloading a Document

In the document page, click the file name of the document to download it.

3.4 Displaying Document Information

FILENET WEB SITE MANAGER	
New Excel Test test.xls	13.5 kB
Folders Filed In	
/etc/medialib/filenet/p8:Root/P8 Browser Test	
Hide System Properties	
Added By:	qaadmin
Document Title:	New Excel Test
Content Elements Present:	"application/vnd.ms-excel"
Minor Version Number:	1
Is Reserved:	false
Delete Pending:	false
Major Version Number:	0
Update Pending:	false
Version Status:	In Process
Added On:	06. July 2006 23:48:34
Classification Status:	Not Classified
Content Size:	13824.0
Create Pending:	false
Is Current Version:	true
Object Type:	Document
Name:	New Excel Test
OCID:	dma:///9bb79d30-7208-11d1-8a25-008048...
Storage Location:	FNDB:/
Is Versioning Enabled:	true
Mime Type:	application/vnd.ms-excel
Is Frozen Version:	false
Modified By:	qaadmin
ID:	{202E1EB3-752D-476C-846D-CDE2B1E233B1}
Modified On:	06. July 2006 23:48:34
Owner:	qaadmin@RND.DAY.COM
jcr:primaryType:	p8:Document
Is In Exception State:	false

In the document page, click **Show System Properties** to display more information about the document.

4 Publishing P8 Content to Web Sites

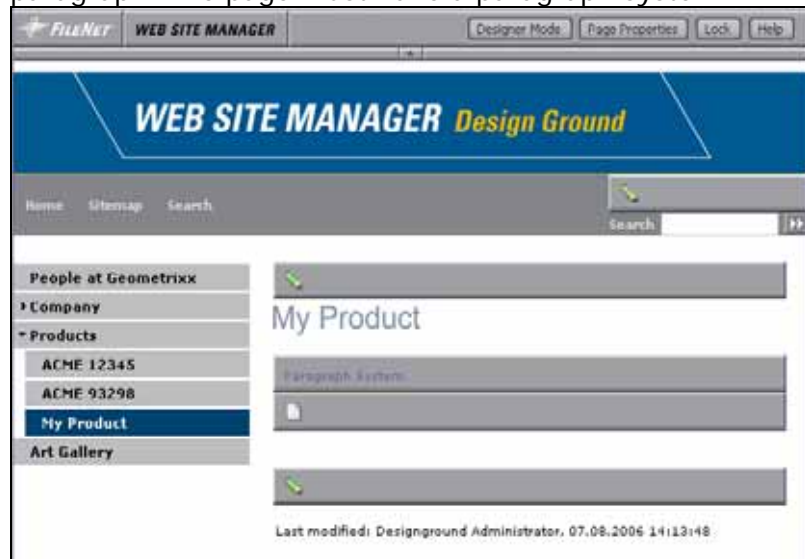
This section tells you how to add a link to a P8 document to a Web page. When a visitor clicks the link, a window opens and the visitor can open or save the document. Some documents require additional software to display.

4.1 Adding a Download Component to a Paragraph System

WSM's paragraph system allows authors to use different types of content, such as pictures, tables, graphs and text, as paragraphs on a page. You can specify which paragraphs are available for authors.

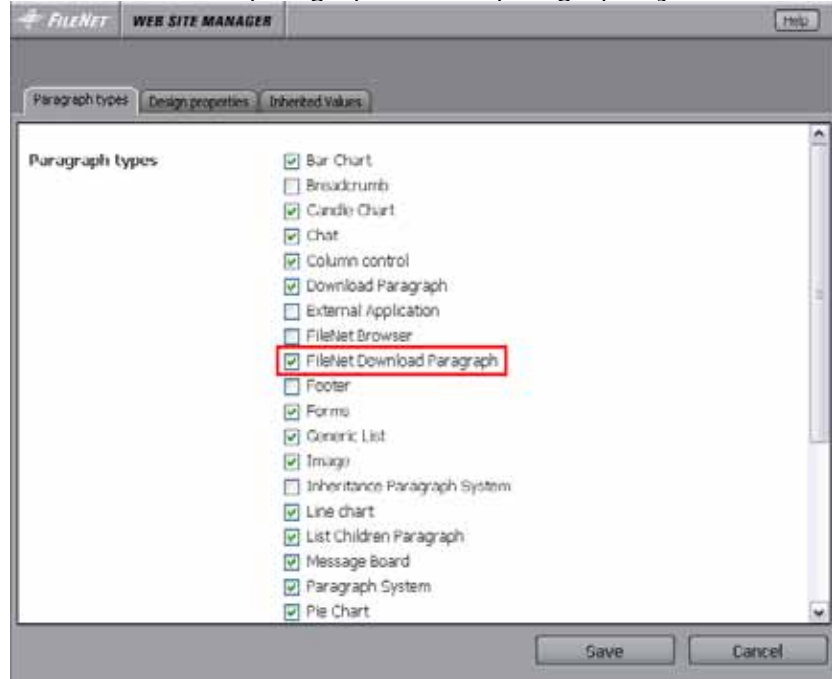
To put P8 content on a Web site, authors can use the FileNet download paragraph. It is available by default on most setups. If it is not, you can make it available as follows:

1. Open the WSM page on which you want to place the paragraph. The page must have a paragraph system.



2. In the toolbar, click **Designer Mode**. WSM switches to the Designer Mode, which lets you customize the authoring interface.
3. Click the **Paragraph System** button. The paragraph system configuration window opens.
4. In the paragraph list, check the **FileNet download paragraph**, and then click **Save**. Authors can now use

FileNet download paragraphs in the paragraph system.



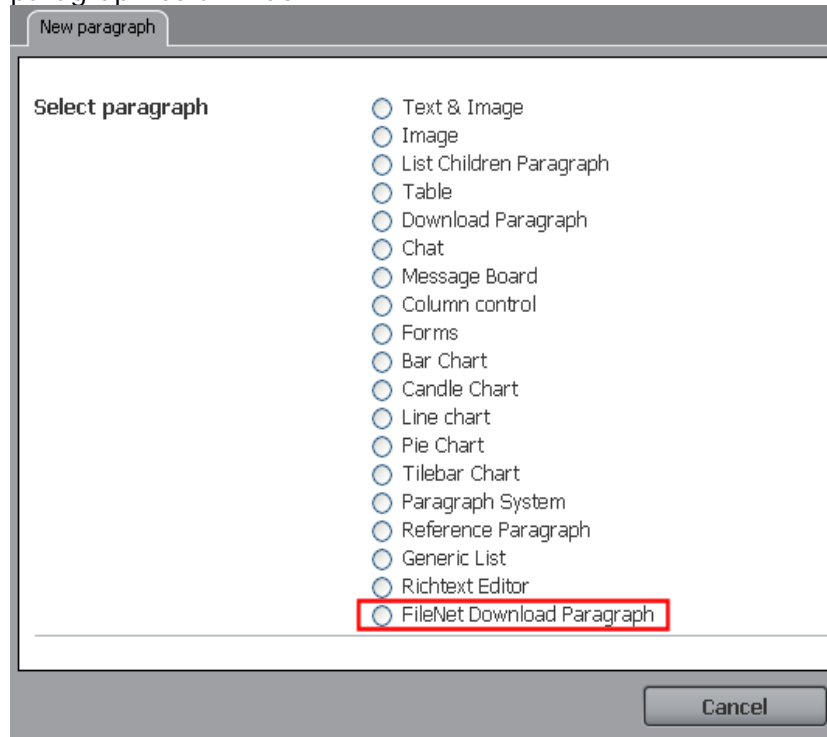
Note: You can also use the FileNet download paragraph in a fixed place of the page (and without an author placing it there manually). Refer to the WSM Developer's Guide for more information on this.

4.2 Adding the Download Paragraph to a Page

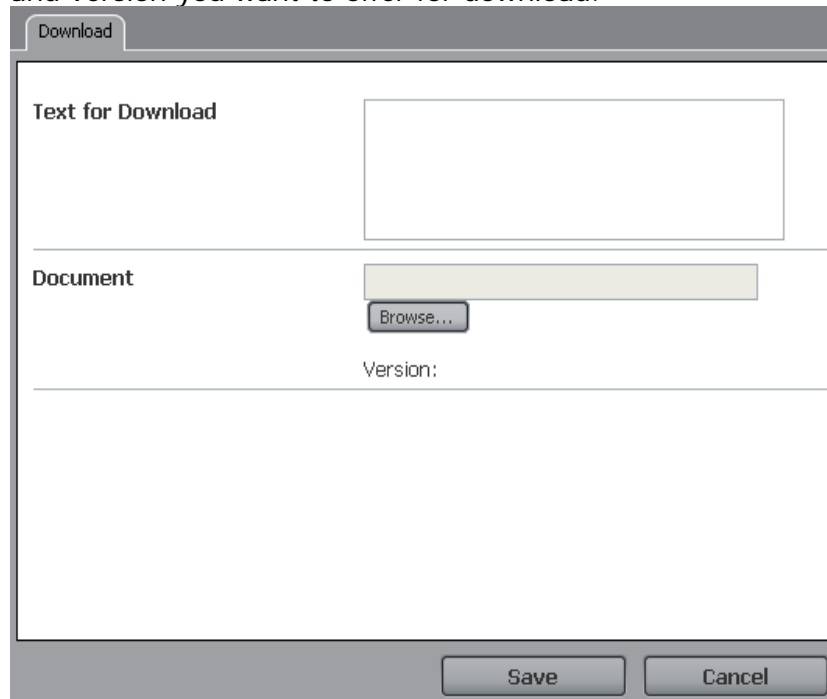
After you have added the FileNet download paragraph to the paragraph system, you can use it on a Web page as follows:

1. Open the WSM page on which you want to place the component.
2. Click the **New** icon (blank page) at the bottom of the paragraph system. The **New Paragraph** window opens.
3. Click **FileNet download paragraph**. WSM adds a new FileNet download paragraph and opens the FileNet download

paragraph edit window.

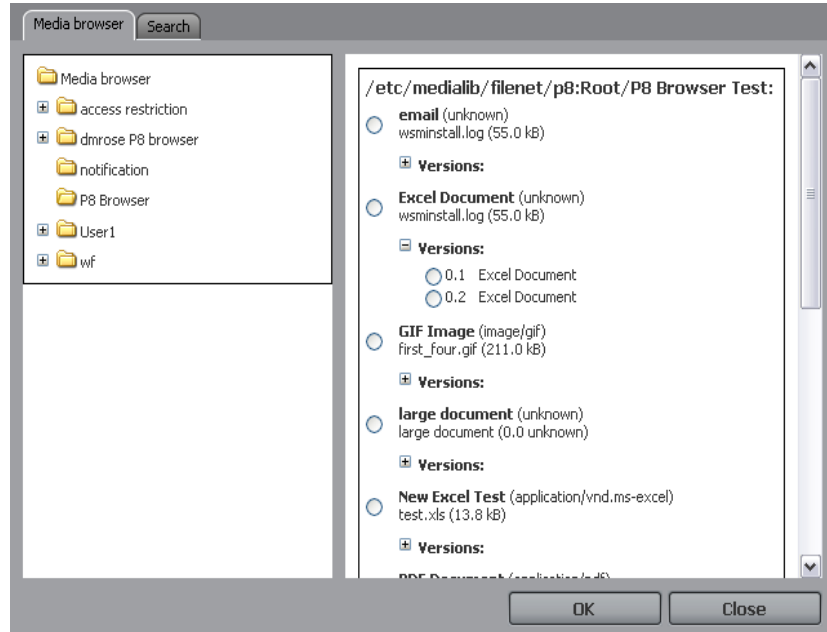


4. The Download window opens. Here, you can select the file and version you want to offer for download.



5. Click **Browse**. The WSM Media Browser opens, and you can select a file from the P8 repository. Click the file you want to use. If you want to use a certain version of the document, unfold the **Versions** list, and then click the version you want

to use. Click **OK** to continue.



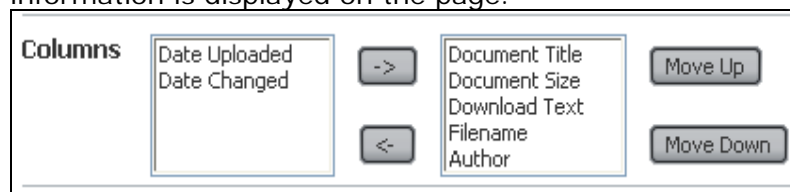
- Click **Save** to add the paragraph to the paragraph system.

Note: The paragraph is displayed only if the current user is logged in and is allowed to see the document, OR if WSM's "anonymous user" can see the document.

4.3 Customizing the Download Paragraph

You can specify which information WSM displays for the download file. To add or remove document information, proceed as follows:

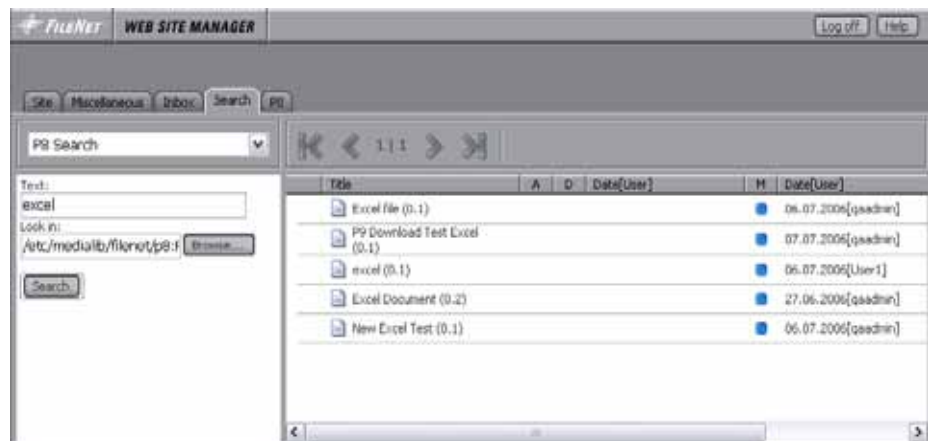
1. Open a page that has a download paragraph.
2. In the toolbar at the top, click the **Designer Mode** button. WSM switches to the designer mode, and the edit bars on the page are replaced by design bars.
3. Click the **FileNet Download Paragraph** button. The design window opens, and you can specify the design of the paragraph.
4. In the Columns list, move fields into the left list to hide them, and in the right list to display them. Use the **Move Up** and **Move Down** buttons to change the order in which the information is displayed on the page.



5. Click **Save** to accept the changes.

Note: The settings are stored in a design page. The design page contains the design settings for the entire Web site, or for a part of the Web site. Any changes are effective for the entire range of pages covered by the design page. In most cases, this means that the changes you make effect the entire Web site, or a significant part of it.

5 Searching the P8 Repository



WSM has an extra search type that allows you to search P8 content. To search for P8 documents, proceed as follows:

1. Log on to WSM's authoring environment.
2. Click the **Search** tab.
3. In the search type list (top left), click **P8 Search**.
4. In the Text field, type the search text.
5. In the Look in field, type where you want to search for content. By default, the search searches the entire P8 repository (as far as it is visible to WSM).
6. Click **Search**. WSM returns all the documents that match your search query. Click the document icon to receive more information about the document.

6 Notification

As a WSM author, you can have WSM notify you if a page changes. The notification only extends to P8 content that is displayed on a Web page. WSM sends a notification if a property of the document has changed in the P8 repository. Note that the notification is visible to WSM users when they access the authoring environment. If you want to receive a notification in the P8 environment, use the P8 notification for this.

6.1 Configuring Notification

To have WSM notify you, proceed as follows:

1. Log on to WSM's authoring environment.
2. Click the **User Properties** button. WSM opens the User Properties window.

The screenshot shows the 'User Properties' dialog box. The 'Properties' tab is selected. The fields are as follows:

User-ID	superuser
Password	
Full name	Superuser
E-mail address	
Notification Configuration (Workflow)	<input type="checkbox"/> Do not send notifications (while page is in workflow) <input type="checkbox"/> Send notification when workflow is completed (initiator)
Notification interval	[Dropdown menu] Defines frequency of reminders to check the inbox
Subscribe	<input type="button" value="Subscribe"/>

Buttons at the bottom: OK, Cancel, Apply.

3. Click the **Subscribe** button. The Subscribe window opens.

Subscribe

Notification Subscription

Select Notification Channels:

Inbox

Select actions to be notified:

Activated
Deactivated
Deleted (syndication)
Modified
Created

Define Package:

Handle
/content Browse... Type Scope
Allow Tree Remove
Browse...
Add/Update

Close

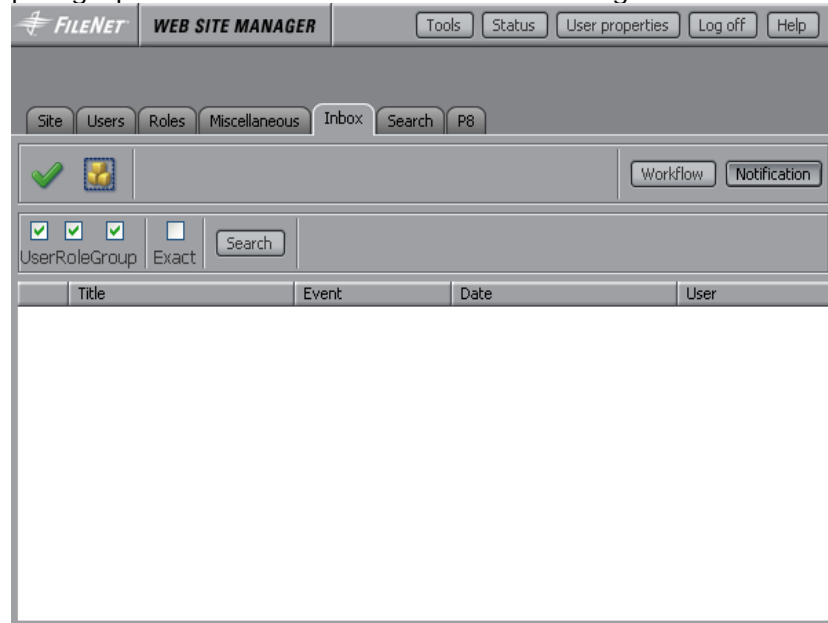
4. In the action list, click the action or actions for which you want to be notified (hold CTRL to click multiple actions).
5. In the Package list, type the path for which you want to receive notifications. For example, to receive notifications for the entire Web site, type **/content**, and click **Allow** and **Tree** in the two following lists, respectively.
6. Click the **Add/Update** button, and then click Close. Now, WSM notifies you for all the actions you have selected.

6.2 Checking Notification

To see a list of the notifications, proceed as follows:

1. Log on to WSM's authoring environment.
2. Click the **Inbox** tab.
3. Click the **Notification** button. WSM displays a list of all the notifications. This list includes pages with a P8 download

paragraph whose source document has changed.



Note: If WSM is configured with a mail server, you can also receive notifications via email.

7 Migrating Office Content to Web Site Content

WSM's RTF import allows you to migrate office content that is stored in the RTF format into Web site content. WSM translates the document into Web site content that you can edit and publish using WSM. The content in WSM loses its relation with the source document, so:

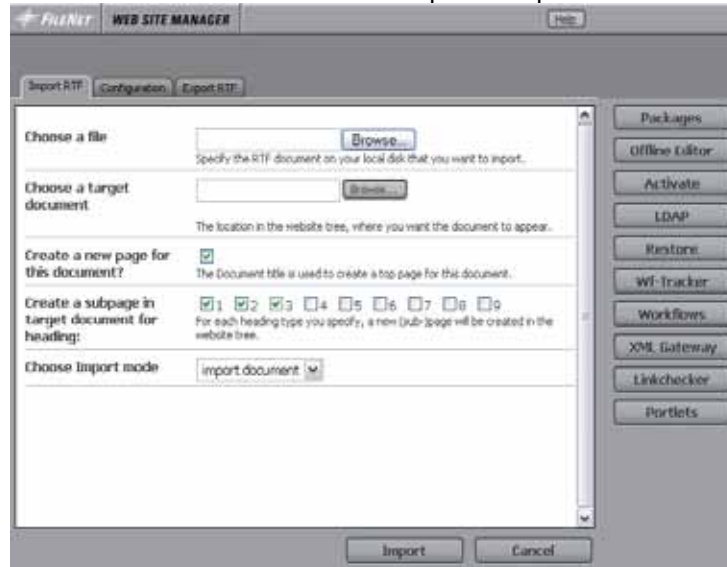
- You can freely edit the pages and paragraphs of the newly created content, just as you can with other Web site content.
- Changes of the WSM content have no effect on the document as it is stored in P8.
- If the source document changes, this will not trigger a notification event.
- Users can see the content if they have access to the Web pages that store it. WSM does not check if they are allowed to see the source document (note however, that the person who migrates the document to WSM needs read access to the document in P8).

Note: The source content must conform to the RTF import settings so that WSM can create the pages and paragraphs correctly. If you want to import a document that was not specifically written to conform to the import settings, you need to reformat the document, or modify the import settings.

To import the document, proceed as follows:

1. Save the document on your computer. You can use either WSM or P8 for this.
2. Log into WSM's authoring environment.
3. In the toolbar, click the **Tools** button. The Tools window opens.

4. Click Offline Editor. The RTF importer opens.



5. Specify the file you want to upload and the target path.
6. Click **Configuration** to load or modify the import configuration.
7. Click **Import** to import the file. WSM creates new pages and paragraphs according to your settings.

Note: For technical reasons, the RTF importer cannot report errors it encounters while processing the document. Please check that all content is imported correctly.

8 Workflow

If you use P8, WSM uses the P8 workflow engine for all workflows, and display them in WSM as it displays WSM workflows. This means that all workflows are available both in WSM and in P8, and that they can be handled in both environments as users of that environment expect.

WSM seamlessly integrates P8 workflows:

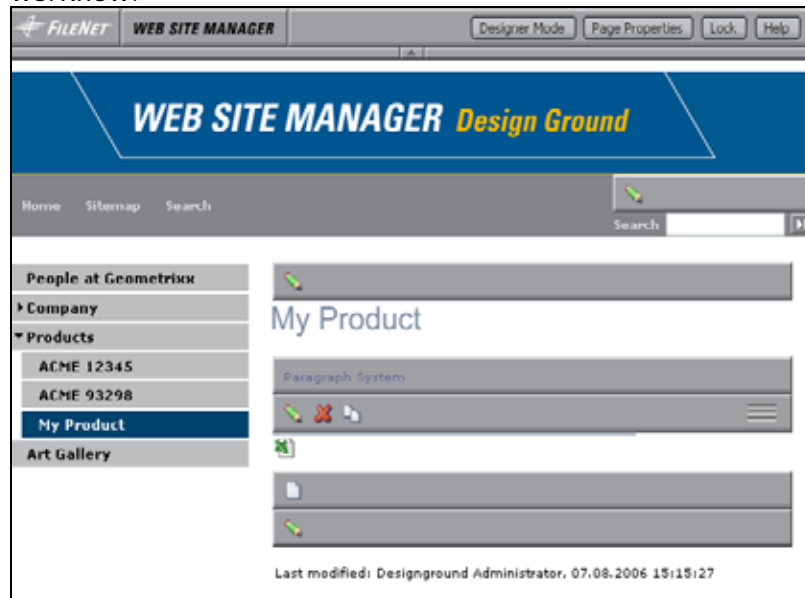
- You can start P8 workflows from WSM.
- You can receive and process workflow tasks from P8 workflows using the WSM inbox.
- You can use P8 workflows to publish WSM pages.

Note: In WSM, you can have a workflow that contains multiple pages. These pages are grouped when WSM displays the workflow. When you look at the same workflow in P8, each page has its own workflow. The difference is only in how P8 and WSM display workflows for multiple pages. Both P8 and WSM process workflows in the same way, using the same workflow engine.

8.1 Starting a Workflow

In WSM, workflows are about pages. To start a workflow for a page, proceed as follows:

1. Open the WSM page for which you want to start the workflow.



2. Click **Page Properties**. The Page Properties window opens.

The screenshot shows the 'Page Properties' dialog box with the 'Meta information' tab selected. The 'Title Text' field contains 'My Product' with a red highlight. Below it, the text 'As shown in the CMS' is visible. The 'Page title' field is empty, with the instruction 'Leave empty to use the title text'. The 'Show Page in Navigation' section has the 'Yes' radio button selected. The 'On time' and 'Off time' sections each have dropdown menus for Year (YYYY), Month (MM), Day (DD), Hour (hh), Minute (mm), and Second (ss), along with a 'Clear' button. The 'Language' section has a dropdown menu set to 'English (United States)', with the text 'Used for spell checking' and 'Inherited value: English (United States) * Spell checking is available for these languages'.

3. Click the **Workflow** tab. In the Workflow list, click the workflow you want to start for this page.

The screenshot shows the 'Page Properties' dialog box with the 'Workflow' tab selected. The 'Choose an existing workflow:' dropdown menu is set to 'Sample Workflow'. Below it, the 'Comments' text area contains the text 'This is a sample workflow.' and a 'Start' button is visible at the bottom left. The 'Save' and 'Cancel' buttons are at the bottom of the dialog.

4. Click **Start** to start the workflow. The P8 workflow is now started, and contains a reference to the WSM page you started it from.

Note: You can use Communiqué’s **Auto Assignment** feature to automatically start a workflow when an author creates a page. You can assign a different workflow for each page template. Because the auto assignment information is stored on the page template, the user who sets the auto assignment needs write access to the page template.

8.2 Processing Workflow Tasks

You can process tasks of P8 workflows in WSM. To access your task list proceed as follows:

1. Log into WSM's authoring environment.
2. Click the **Inbox** tab.
3. Click the **Workflow** button. WSM displays a list of all the tasks in your inbox.
4. Click the workflow you want to process.



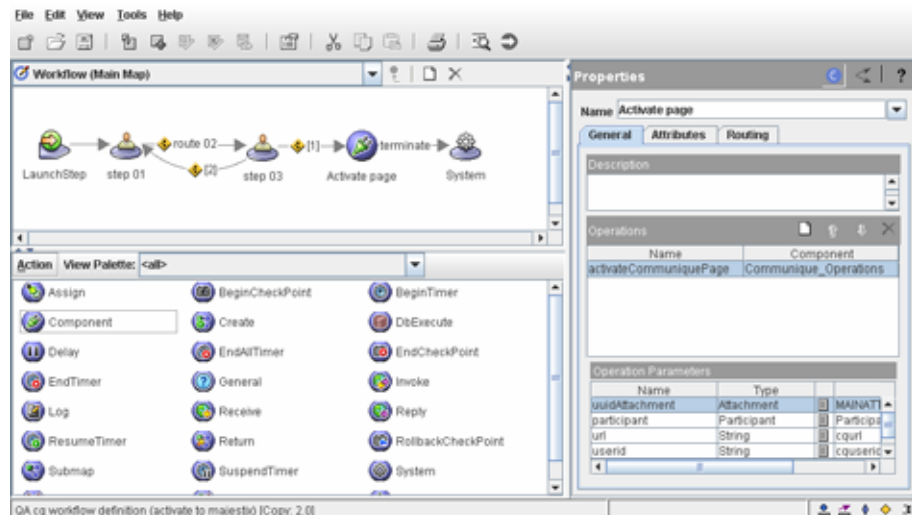
The workflow task bar contains the following icons (from left to right):

Next	Proceed to the next workflow step.
Details	Shows details about the workflow, the page it is attached to, and the current step. Use this to read the comments from previous users who have worked on this workflow.
Lock (Unlock)	Locks and unlocks the workflow page, respectively.
Delegate	Forwards the task to another user.
Terminate	Cancels the workflow.

Note: From WSM, non-WSM tasks can only be completed and not shown in the configured step processor.

8.3 Creating a Publication Workflow

To create a publication workflow, you can use WSM components in the P8 Process Designer.



To trigger a WSM action in a P8 workflow, proceed as follows:

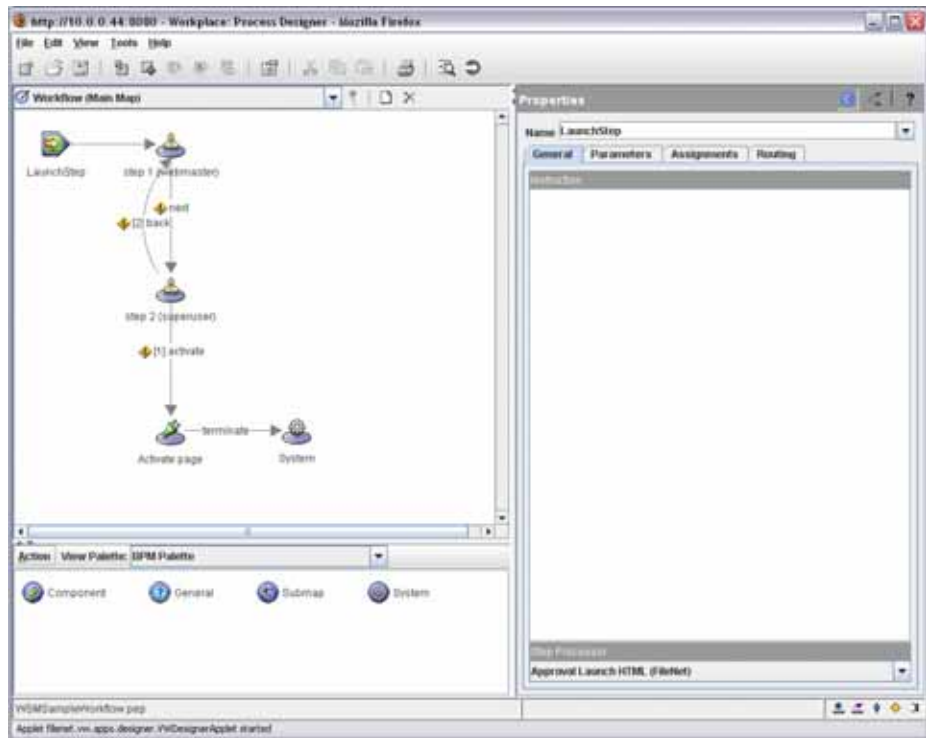
1. Open the P8 Process Designer.
2. In the workflow, add a workflow component step at the place where you want to trigger the WSM action.
3. Click the workflow component step. In the Operations group, click **Add** to add an action. The operation selection window opens.
4. Click the WSM operation that you want to trigger, and then click **OK**. The workflow now triggers the WSM action you have selected on the WSM page on which the workflow was started.

8.4 Using the Sample Workflow

WSM comes with a sample workflow that you can use for educational purposes, or as a basis for your own workflows.

The sample workflow has two non-specific steps, and then publishes the page.

8.4.1 Loading the Sample Workflow



The sample workflow is in the **/opt/p8** folder of your FileNet WSM installation folder. It is named **WSMSampleWorkflow.pep**. To load it, proceed as follows:

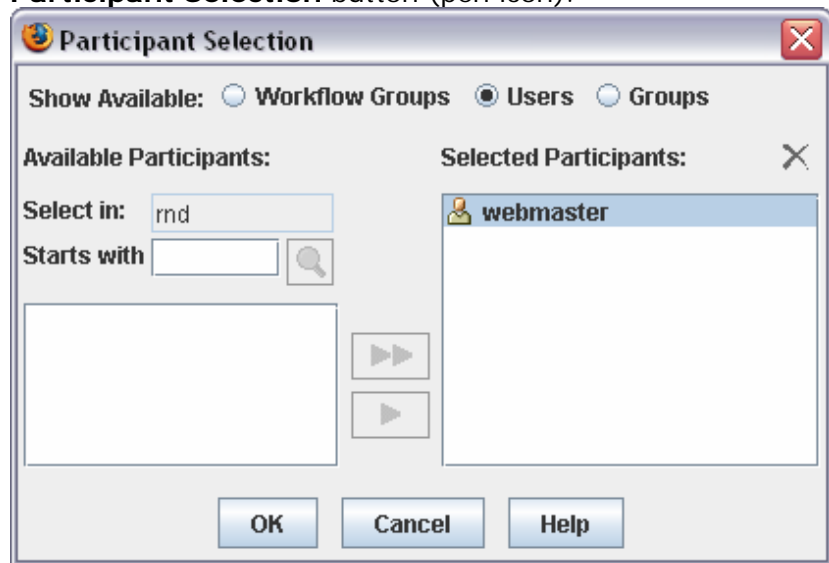
1. Open the P8 Process Designer.
2. In the **File** menu, click **Open**.
3. Select the file **WSMSampleWorkflow.pep**, and click the **Open** button. The workflow opens.

8.4.2 Configuring the Users

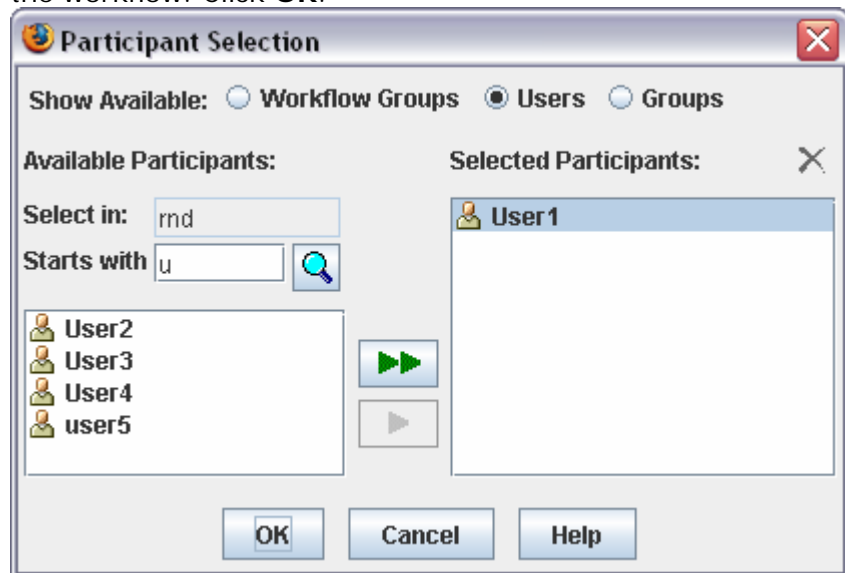
Before you can use the workflow, you need to exchange the sample users with users that are available on your WSM installation:

1. Click the step **step 1**. The properties are displayed on the right side.

- In the Participants list, click **webmaster**, and then click the **Participant Selection** button (pen icon).



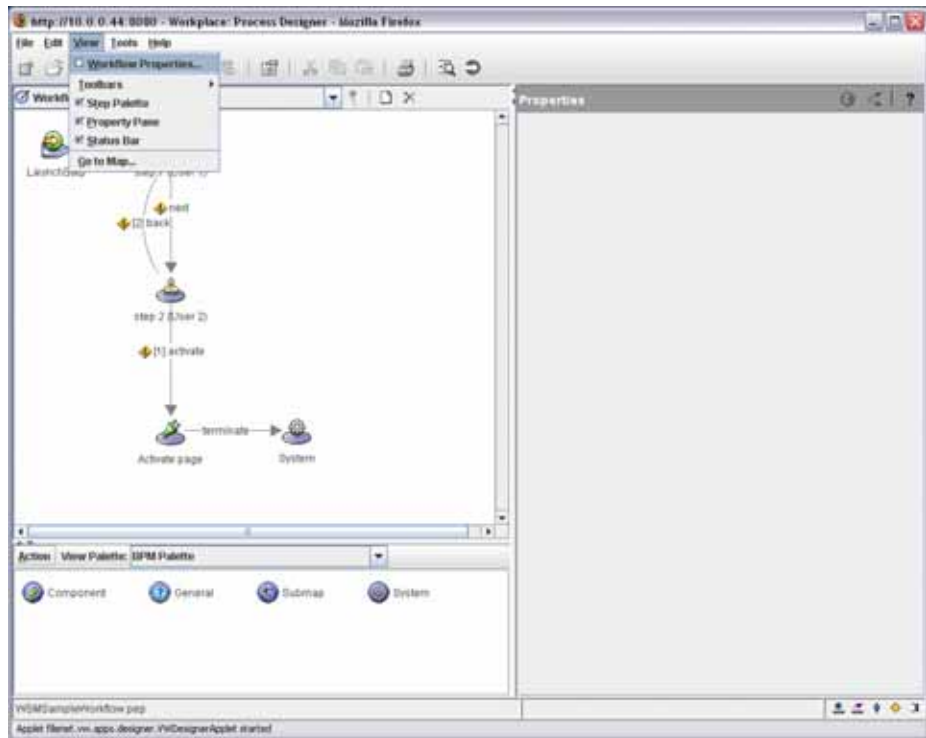
- Click **Users**. The user selector is displayed.
- Click the **webmaster** user, and then click the **Delete** button (cross icon). The webmaster user is now removed.
- In the **Starts with** field, type the first letter(s) of an existing user, and then click the **Search** button (magnifying glass icon) to display a list of users. Click a user, and then click the **Add** button (single arrow). This adds the user to the workflow. Click **OK**.



- Back in the **Properties** list, modify the **Name** field to reflect the user you have added to the workflow step. For example, type "step 1 (user 1)".

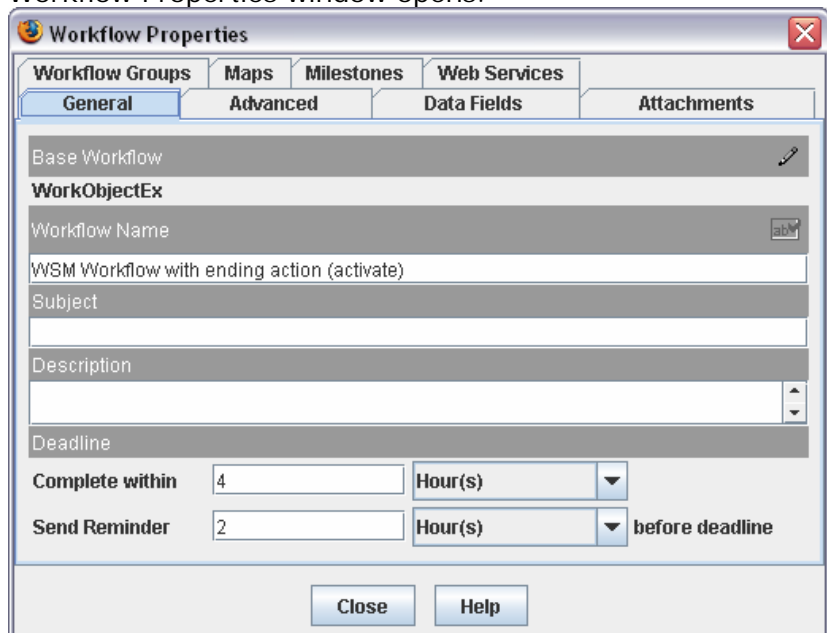
Repeat these steps for step 2. After you have configured both steps, click the **Routing** tab in the properties of both steps, and change the text to reflect the users you have added to the steps.

8.4.3 Configuring the Publication Settings



Before you can use the workflow for publication, you need to change the activation settings, as follows:

1. In the View menu, click **Workflow Properties**. The Workflow Properties window opens.



2. Click the **Data Fields** tab. This tab displays the settings that the workflow uses to connect to WSM.
3. In the **wsmurl** field, type the URL to the WSM workflow script. The URL is
"http://myServer:portNumber//author/libs/FileNet/content/c

q_operations.html", where myServer and portNumber are the server address and port number where WSM runs.

4. In the **wsmuserid** and **wsmpassword** fields, type the user ID and password of a WSM administrator user. This user must have all necessary rights to manipulate WSM workflows.
5. Click the **Advanced** tab.
6. In the **Roster** field select **WSMRoster**. Note that if the WSMRoster does not exist in the P8 process engine, WSM creates it when it starts.
7. Click the **Close** button.