

IBM Content Navigator

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IBM Content Navigator - ECM User Experience

IBM Content Navigator is a collaborative and mobile content experience

- Access to documents anywhere
 - FileNet Content Manager
 - IBM Content Manager
 - Content Manager OnDemand
 - CMIS (tech preview)
 - ICA text search
- Desktop and mobile
 - Browser application
 - Office integration
 - iOS mobile application
- Benefits
 - Business user access to all documents
 - Common navigation and terminology regardless of source and workstation environment

The screenshot displays the IBM Content Navigator interface. The left sidebar shows a navigation tree with 'Focus Corp Finance' selected. The main pane shows a document list with columns for Name, Size, Modified By, and Modified On. The document 'Atlanta TEC - Updated Contract' is selected. The right pane shows the document's properties, including Class (Contract), Document Title (Atlanta TEC - Updated Contract), Authoring Division (Sales), Type of Document (Long Term Contract), Review Status (Ready for review), Target Agreement Date (10/4/2011 11:00 PM), Agreement Date (10/10/2011 11:00 PM), Governing Law (Arkansas), Law Firm (Butler McCabe & Ruper), Parties (Atlanta TEC), and Sector (Computer Hardware).

Name	Size	Modified By	Modified On
Reference material		PSAdm	3/7/2012 4:09 PM
Atlanta TEC - Updated Contract	473 KB	rhowath	10/20/2011 12:50 PM
Atlanta TEC Capital Lease Contract.pdf	71 KB	rhowath	10/19/2011 3:20 PM
Atlanta TEC Computer Hardware Contract.pdf	473 KB	rhowath	10/19/2011 3:21 PM
Atlanta TEC Invoice.doc	55 KB	rhowath	10/19/2011 3:21 PM
Atlanta TEC Midwest Lease Agreement.pdf	87 KB	rhowath	10/19/2011 3:21 PM
Atlanta TEC.pdf	1.1 MB	rhowath	10/19/2011 3:21 PM

Production Imaging, reports and statements

- Advanced search
- Business processes
- Work assignment
- Image and statement viewing
- Side by side and tabbed viewing
- Annotations

Multiple Searches

Work delivery

Tabbed and side by side viewing

The screenshot shows the Focus Corporation search interface. The search criteria are as follows:

Field	Operator	Value
Search in	Focus Corp Finance (including subfolders)	Search options: Documents, Reports
Class	Contract (including subclasses)	
Agreement Date	Equals	6/5/2012
Authoring Division	Equals	Sales
Governing Law	Include All	Arkansas, California, Illinois
Law Firm	Equals	Butler McCabe & Ruger
Parties	Equals	Rackspace Managed
Review Status	Equals	Ready for review
Sectors	Equals	Material and Construction
Target Agreement Date	Equals	6/21/2012
Type of Document	Equals	Long Term Contract

The interface also shows a sidebar with 'Recent Searches' including 'Invoices by Region', 'Contracts by Governing Law', and 'Valuations by Company'. The search results pane shows a list of items with columns for 'Description', 'Quantity', and 'Unit Price'. A red circle highlights a value of \$10,803.35 in the 'Unit Price' column.

The screenshot shows the Focus Corporation viewer interface with multiple documents open in a tabbed view. The documents include:

- Sample Invoice.tif
- Misc Software Invoice.pdf
- Sample Invoice.tif
- Misc Software Invoice.pdf

The leftmost document is a repair order for '602914' from 'MIC SYSTEMS & SOFTWARE, INC.'. The rightmost document is an invoice with a table of items:

Description	Quantity	Unit Price
...	2	\$2,500.00
...	6	\$180.00
...	1	\$10,803.35

Collaborative content management

Thumbnails

- Document authoring
- Folder organization
- Property and text search
- Checkin/out
- Classification and taxonomy
- Flexible security
- Review/approve
- Thumbnail, preview, print, download as ...
- External Data integration

The screenshot displays the IBM Content Navigator interface. On the left, a navigation pane shows a folder structure under 'Focus Corp Finance', including folders like 'Customer Contracts', 'Emails', 'Focus Corp', 'Processes', 'Reference material', 'Photos', 'Draft', 'Presentations', 'Templates', 'Valuations', 'Working', 'Demo', 'Ilan', 'Images', 'Rob', 'Steve', and 'demo photos'. The main area shows a table of files in the 'Presentations' folder:

Name	Size	Modified By	Modified On
A&T Piano.ppt	823 KB	shussey	07/2012 11:40 AM
Amazing Cards.ppt	4.0 MB	rowarth	10/19/2011 3:47 PM
Atlanta TEC.ppt	1.1 MB	rowarth	10/19/2011 3:38 PM
Better Investing.ppt	7.5 MB	rowarth	10/19/2011 3:38 PM
Better Investing.ppt	7.5 MB	rowarth	10/19/2011 3:46 PM
Better Investing.ppt	7.5 MB	rowarth	10/19/2011 3:44 PM
Cycle World.ppt	3.9 MB	rowarth	10/19/2011 3:45 PM
Dispute Process.pptx	124 KB	shussey	5/7/2012 2:42 PM
ISO Networks.ppt	515 KB	rowarth	10/19/2011 3:46 PM
JK Enterprises.ppt	201 KB	rowarth	10/19/2011 3:45 PM
Slough Trading.ppt	2.2 MB	rowarth	10/19/2011 3:46 PM
Slough Trading.ppt	2.2 MB	rowarth	10/19/2011 3:46 PM
Smith Corporation.ppt	1.4 MB	rowarth	10/19/2011 3:47 PM
Tech Masters.ppt	515 KB	rowarth	10/19/2011 3:46 PM
demo presentation.ppt	843 KB	shussey	6/7/2012 7:35 AM

On the right, a 'Properties' panel shows details for the selected 'JK Enterprises.ppt' file, including its class, title, and system properties. Below the main interface, a separate window titled 'IBM Content Navigator Viewer - Mozilla Firefox' displays a preview of the 'JK Enterprises.ppt' document. The preview shows a slide with a blue and orange geometric design and the text 'JK Enterprises Outline Business Plan'. Below the slide, the text 'Introduction and Contact Details' is followed by a list of fields: Name, Position, Business, Address, and Web site, each with a corresponding label.

Office Document Preview

Business self provisioning



- My Documents replacement
- Quarterly and annual business reviews
- Events and conferences
- Standard operating procedures
- Contracts/ vendor management
- ...

The screenshot shows the IBM 'Nexus' Teamspace interface. At the top, it says 'IBM "Nexus"' and 'Rich Howarth'. The main area is titled 'IOD Conference' and contains a table of folders:

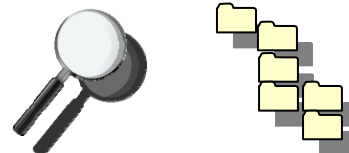
Name	Modified By	Modified On
Conference Materials	rhowarth	4/24/2012 4:36 PM
Maps	rhowarth	4/24/2012 4:36 PM
Photos	rhowarth	4/24/2012 4:36 PM
Presentation Template	rhowarth	4/24/2012 4:36 PM
Presentations	rhowarth	4/24/2012 4:36 PM
Speakers	rhowarth	4/24/2012 4:36 PM

On the right, a 'Team' panel lists members:

- Howarth, Richard (Rich)**: Director, ECM Software Development, IBM Software Group, Enterprise Content Management, BOULDER, CO United States, 1.303.924.7310, rhowarth@us.ibm.com
- Murphy, John**: Vice President, ECM Product Development, IBM Software Group, Enterprise Content Management, COSTA MESA, CA United States, 1-714-527-8009, john@us.ibm.com
- O'Connor, Christopher**: Vice President Industry Solutions Software, IBM Software Group, DUSHAM, NC United States, 1-919-224-2000, chriscoc@us.ibm.com
- Morris, Dana**: Senior Manager, ECM Client Development, IBM Software Group, Enterprise Content Management, HERNDON, VA United States, 1-703-943-1129, danmorra@us.ibm.com



Teamspace



External data services

- OOTB UI functionality
 - Applies to add document, checkin, modify properties, search
- Populate fields from lookups
- External choice lists
- Dependencies between properties
- Set default or dynamic values
- Property value and format validation
- Dynamic properties

- External services are provided with user id, current action, browser language
 - Enables context sensitive data

The screenshot shows a web form titled "Add Document". It contains several input fields and dropdown menus. The "Properties" section is expanded, showing a "Class" dropdown set to "Invoice". Below this, there are fields for "Document Title" (EBO Invoice.docx), "Authoring Division" (Sales), "Type of Document" (Standard Invoice), "Review Status" (Ready for review), "Account Number" (23-34837), "Customer Name" (EBO Networks), "Region" (Southwest), and "Branch Office" (Las Vegas). There are also fields for "Total Cost" and "Total Units". Three black arrows point from a red box at the bottom right to the "Account Number", "Customer Name", and "Region" fields, indicating that these values are populated from external data services.

Database
CRM
ERP
Custom



Navigator visual component toolkit

Focus Corp Finance > Customer Contracts > Account 25-13652

	Name	Last Modifier	Date Last Modified	Majo
📁	Reference material	P8Admin	10/9/2011 11:23 PM	
📄	Atlanta TEC Capital Lease Contract.pdf	rhowarth	10/19/2011 3:20 PM	
📄	Atlanta TEC Computer Hardware Contract.pdf	rhowarth	10/19/2011 3:20 PM	
📄	Atlanta TEC Invoice.doc	rhowarth	10/19/2011 3:21 PM	
📄	Atlanta TEC Midwest Lease Agreement.pdf	rhowarth	10/19/2011 3:21 PM	
📄	Atlanta TEC.ppt	rhowarth	10/19/2011 3:21 PM	

▼ Document Information

Properties

Folder Name: Reference material

System Properties

Added By: Richardson, Bill

Added On: 10/9/2011 8:51 PM

ID: {7546B284-1743-4400-A145-E4671A496D44}

Path Name: /Customer Contracts/Account 25-13652/Reference material

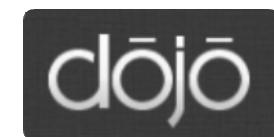
▼ Browse

- Focus Corp Finance
 - Customer Contracts
 - Account 15-18173
 - Account 25-13652**
 - Account 35-17232
 - Account 55-23523
 - Account 65-37433
 - Invoices
 - Reference material
 - Presentations

- Change or extend Content Navigator
- Build complete applications
- ECM-enable applications in any framework
- Use ECM Dijits, full Dojo library, other JavaScript packages to build your solutions

▼ Work

- Contract Manager
 - My Personal Work
 - Contracts ready for approval
- Contract Reviewer
 - Contracts for review



<http://dojotoolkit.org/>



Navigator visual toolkit in other UIs

- Dojo components integrate into any web user experience
 - Interact with the rest of the desktop via JavaScript
- Websphere Portal development tools support Dojo
 - http://www-10.lotus.com/ldd/portalwiki.nsf/dx/Dojo_and_WebSphere_Portal_wp8
- Below is an example of SharePoint with Navigator embedded
 - Sample from the Navigator Redbook

The screenshot displays a SharePoint web interface. On the left, there is a navigation pane with sections for 'Home', 'Recently Modified', 'Libraries', and 'Repository'. The main area is titled 'Browse repository' and shows a file browser for a folder named 'myfolder'. The file browser table lists three items: a folder named 'test', a file named 'Milestone.png' (15 KB, modified by schmidse on 6/19), and a file named 'Site.png' (219 KB, modified by schmidse on 6/19). The 'Milestone.png' file is selected, and an 'Actions' menu is open over it, listing options such as Open, Preview, Download, Delete, Properties, Check Out, Check In, Cancel Check Out, Send Email, Export, Launch Workflow, Add to Favorites, Folders, and More Actions. The 'Major Version' column shows a value of 1 for the selected file.

Name	Size	Modified By	Mod	Major Version
test		schmidse	6/19	
Milestone.png	15 KB	schmidse	6/19	1
Site.png	219 KB	schmidse	6/19	1



Adoption of Content Navigator

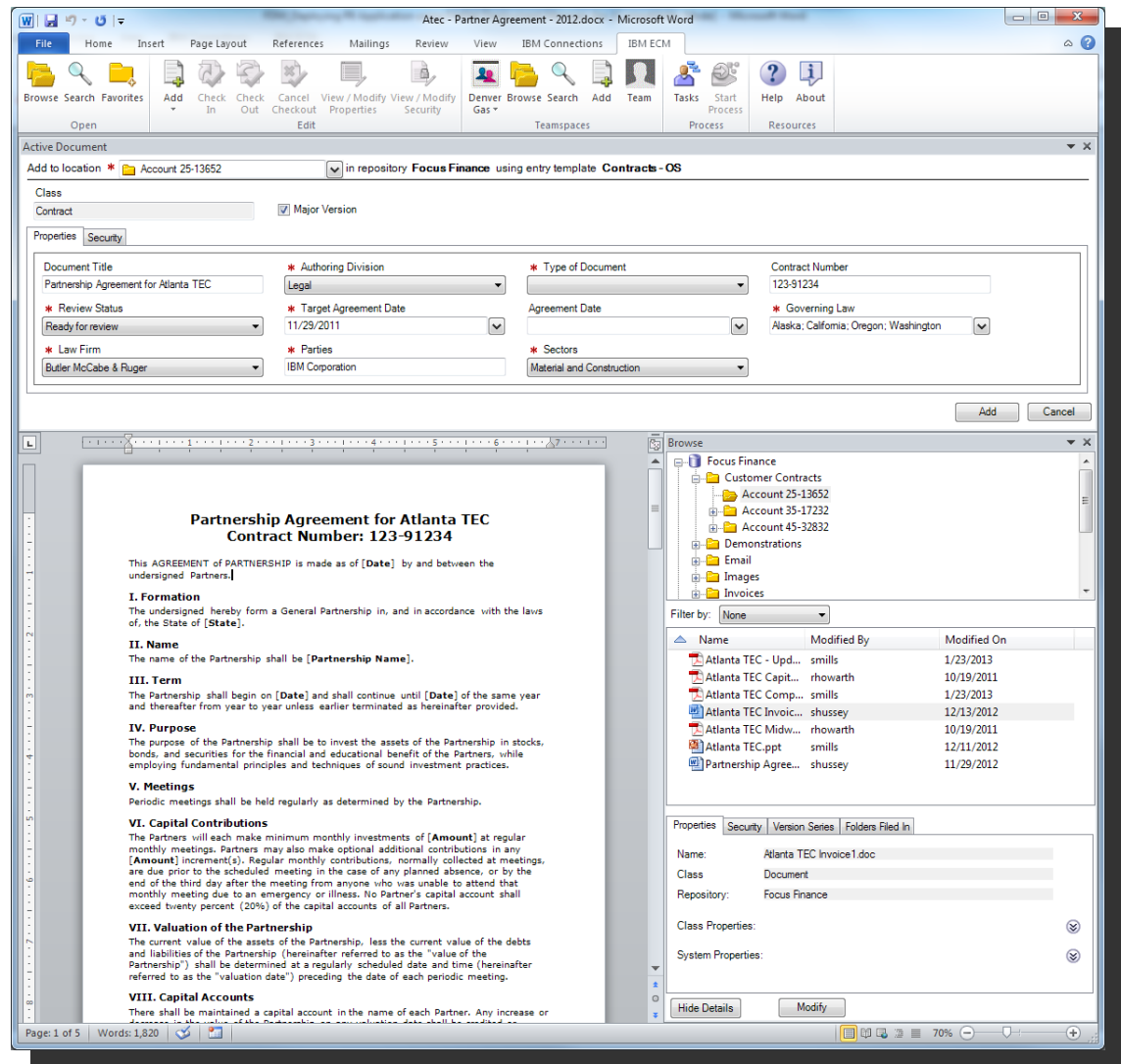
- ECM products are adopting Navigator
 - Plug-ins for Navigator
 - Moving to Navigator framework for product UIs
- Delivered or in-process
 - Case Manager (viewer in current release)
 - Case Foundation
 - Enterprise Records
 - Content Analytics
 - Content Classification
 - Datacap
 - ICC for SAP
 - FileNet Administration



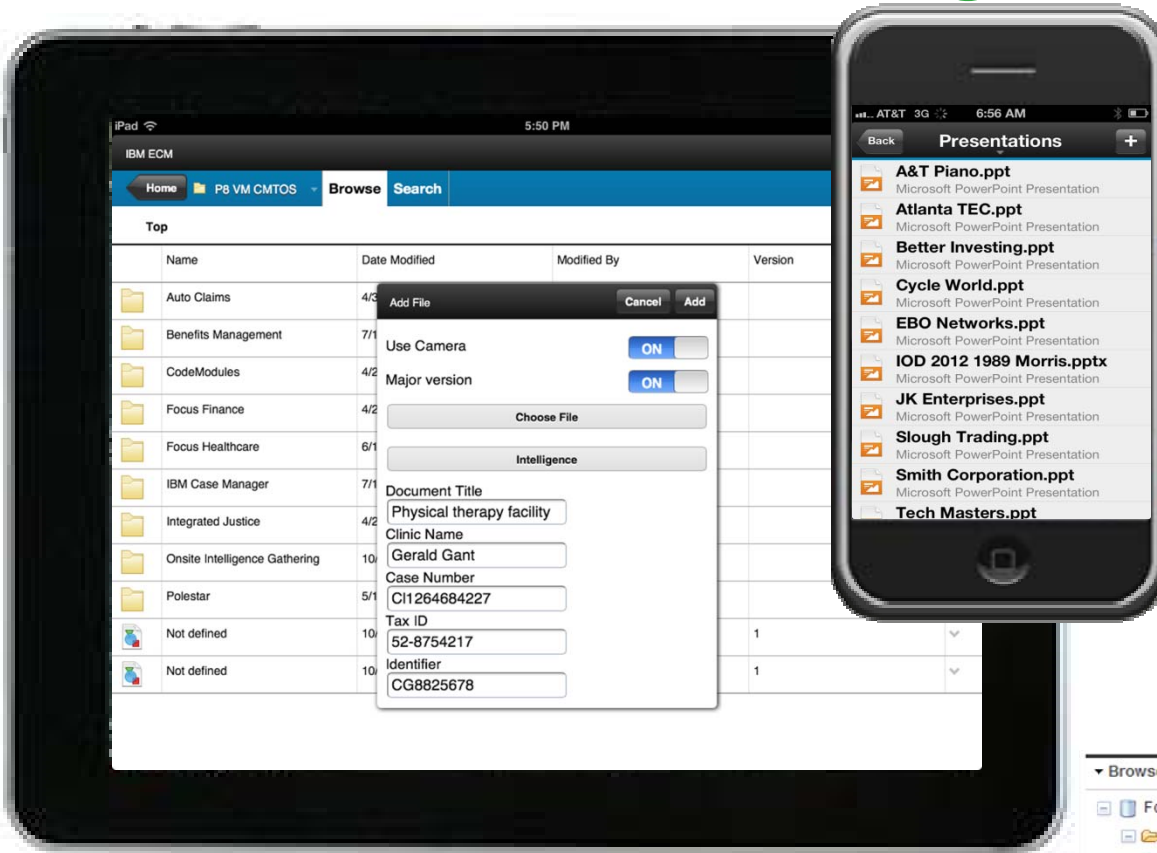
IBM Content Navigator for Office

- Heads down MS Office productivity experience
 - Browse, search, favorites, teamspaces, review / approve

- Simple and accurate classification
 - Entry templates
 - External lookups
 - Automatic document properties to repository property mapping



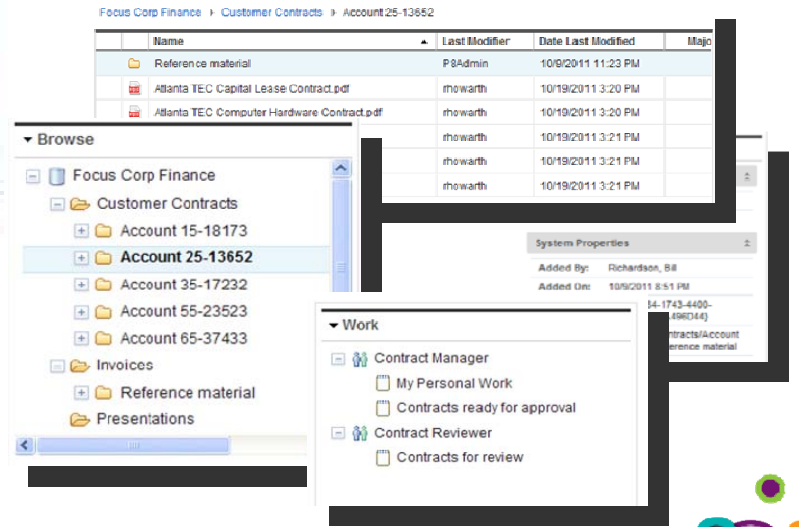
Mobile solutions matching business needs



Reusable components for client & partner solutions



IBM Content Navigator for iOS
Browse, Search, View, Add from camera,
Send to / from other apps, Datacap
capture processing, Case, etc...



Extending the Navigator experience

Rapid configuration of user experience for each application

- Desktop configuration
 - Title, labels, icons, help
 - Feature selection (Search browse, work, teamspace...)
 - Layout
 - Menus and toolbars
 - Repositories
- Viewer mappings
 - The right viewers for the user
 - Custom viewers
- Teamspace templates
 - Project specialized folders, documents, searches, roles

Packaged plug-ins deliver remaining requirements

- Menu items
 - Add custom actions to OOTB menus.
- Feature
 - Search, Browse, Teamspaces are OOTB features. Add your own alongside them
- Custom Layout
 - The layout defines the arrangement of the widgets that are used in a desktop
- Dijit
 - Add your own components
- Request/response filter
 - Message data being set to and from client browsers
- Viewer
 - Snap in 3rd party viewers
- External data services
 - Wire in ERP, CRM,...



Content Navigator “.next” candidate features



- **Socializing around content**
 - View document downloads & who is downloading
 - Comment on / discuss documents
 - Tag, Rate, Notifications, etc.
- **Productivity**
 - Teamspace document review and approvals
 - Cross repository search
 - Multi document updates in a single action
 - Office: IBM Content Manager support
 - Mobile: support Case, offline, build searches
 - Plugins for Docs, QuickFile, etc.
- **Enhanced self provisioning and deployment**
 - Navigator configuration export/import (including desktops)
 - Teamspace template export/import
 - Business user document class provisioning

Focus Corp Finance > Customer Contracts > Account 25-13652

Name	Last Modifier	Date L
Reference material	PaAdmin	10/9/2
Allanta TEC Capital Lease Contract.pdf	rhowarth	10/19
Allanta TEC Computer Hardware Contract.pdf	rhowarth	10/19
Allanta TEC Invoice.doc	rhowarth	10/19
Allanta TEC Midwest Lease Agreement.pdf	rhowarth	10/19
Allanta TEC.ppt	rhowarth	10/19

Document Information

Properties

Folder Name: Reference material

System Properties

Added By: Richardson, Bill
 Added On: 10/9/2011 8:51 PM
 ID: (7546B284-1743-4400-A145-E4671A496D44)
 Path Name: /Customer Contracts/Account 25-13652/Reference material

Browse

- Focus Corp Finance
 - Customer Contracts
 - Account 15-1817
 - Account 25-136**
 - Account 35-1723
 - Account 55-2352
 - Account 65-3743
 - Invoices
 - Reference materi
 - Presentations

Work

- Contract Manager
 - My Personal Work
 - Contracts ready for approval
- Contract Reviewer
 - Contracts for review



Demonstrations

- Latest version of:
 - IBM Content Navigator Web
 - IBM Content Navigator Office
 - IBM Content Navigator Mobile



Q&A, Thank You!

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