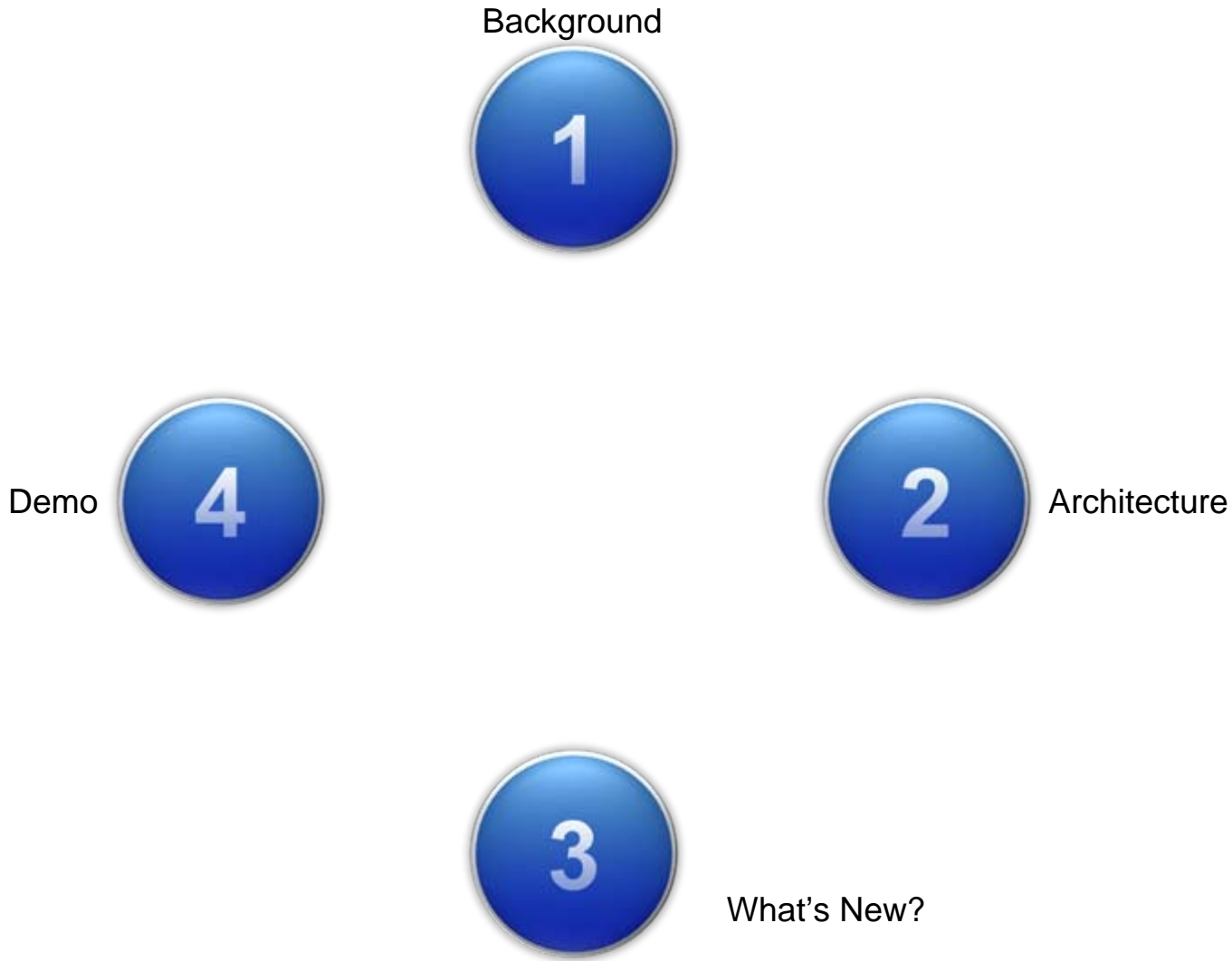


IBM Enterprise Content Management Platform

**Susan Noonan, North America
Mid-Atlantic Technical Sales Specialist**



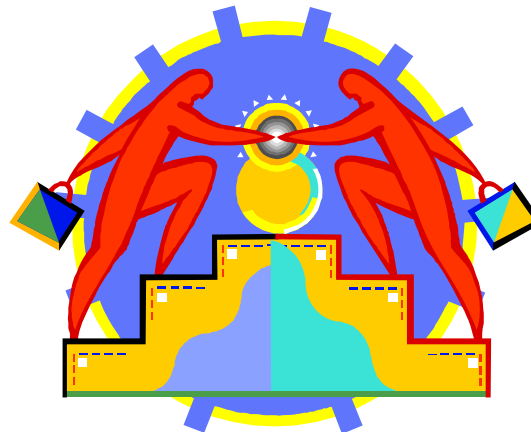




Background



- SharePoint
 - Enhances team productivity through collaboration
 - Consistent user experience
 - Reduces training costs
- FileNet P8
 - Discipline and controls (e.g. retention and compliance)
 - Business process management
 - Central management (e.g. archival and backup)
 - Scalability



Use Cases for Integrated BCS/ECM

- Archival – keep SharePoint humming
- Assets only in the trusted vault
 - Not all documents are assets
 - Assets are sensitive
- Compliance
- Business process management
- Information reuse
- User-experience

Background



Streamline and
Extend

Background



Architecture

Web Parts Connector, What is it?

- Collection of Web Parts which allow end users to interact with documents in FileNet P8 directly from the SharePoint
- Merges basic document management capabilities with Microsoft user experience
- Real-time access of P8 content from SharePoint

Capabilities:

- View/Browse/Search
- Check in/out
- Upload document
- Edit
- Edit properties
- Delete
- Column Sorting & Filtering
- Business Process Management Support
 - Personal Inbox (tasks)
 - Public Queues
 - Launch P8 BPM Workflow from SharePoint
- Stored Search Support

ICC for SharePoint, What is it?

- SharePoint initial content authoring environment, & content ultimately swept into & accessed from P8
- Provides SharePoint basic content services and collaboration, but customers need a secure and centrally managed repository
- Provide a seamless and automated way for content to transition into an ECM repository

Capabilities:

- SharePoint-created content move into & managed by the ECM repository; and deleted from SharePoint
- Move and Retain Link (“stubbing”)
- Retention of created-by, modified-by metadata
- “Sweeping” of pre-existing SharePoint site content
- Automatic SharePoint child site discovery
- Central Configuration Utility with common repository
- Remote Deployment
- Records Management support

Supports:

- WSS 3.0, MOSS 2007, SharePoint 2010, 2013
- IBM FileNet P8 5.x

SharePoint

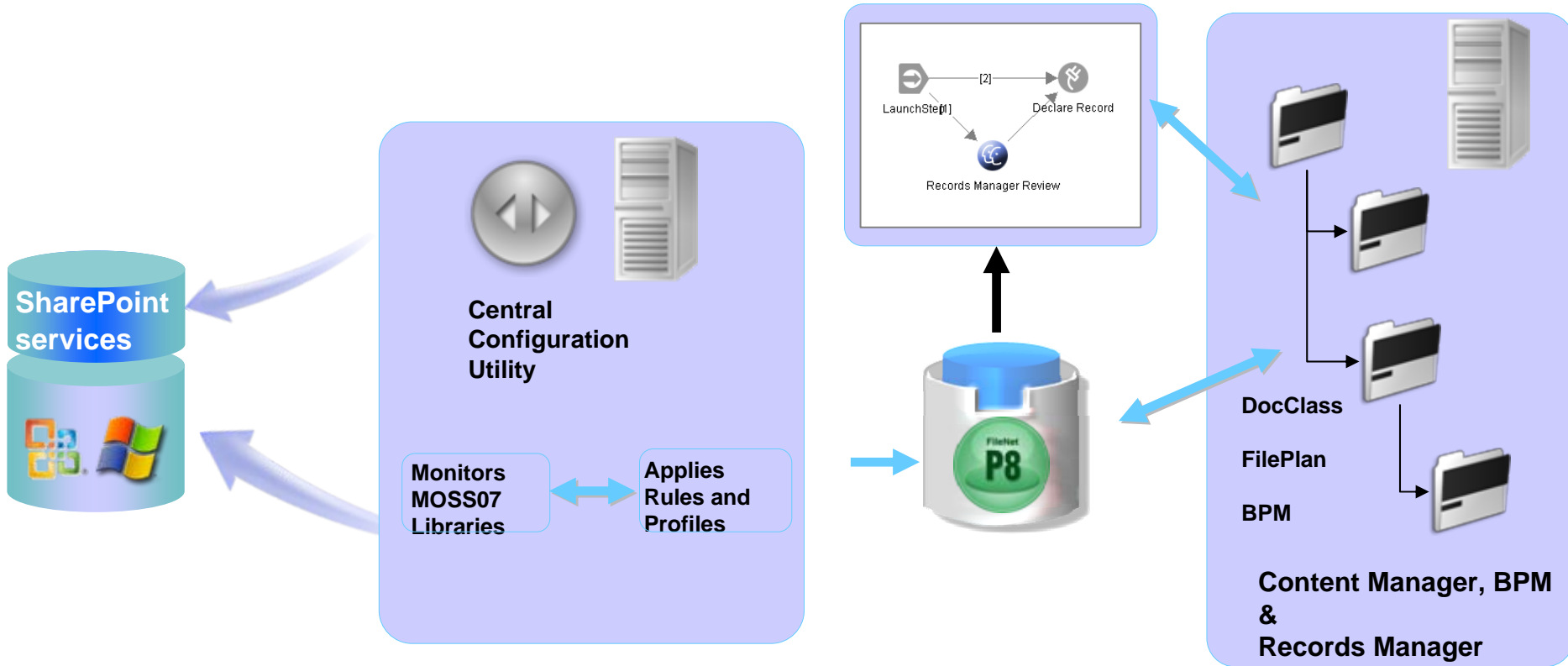


© 2013 IBM Corporation



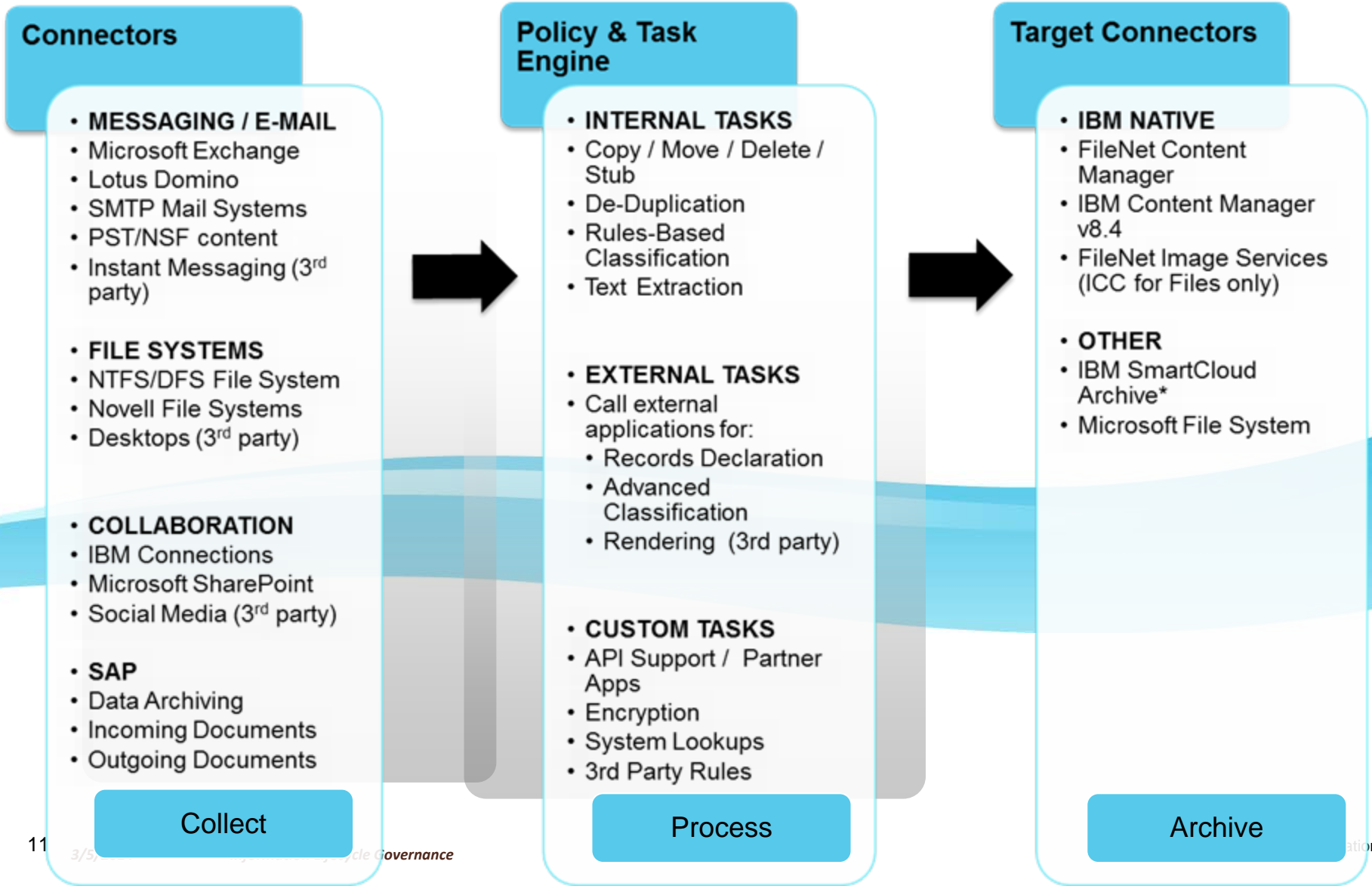
SharePoint Integration

Delivering ECM to all Information Workers



Collect, Process and Archive

Across multiple sources and targets



Background



Streamline and
Extend

Simple and
Flexible



Architecture

Background



Architecture



What's New?

- Collection levels and depth
- Library or list type filtering
- User filtering
- Column support enhancement
- Icon Mirroring
- Re-collection enhancements

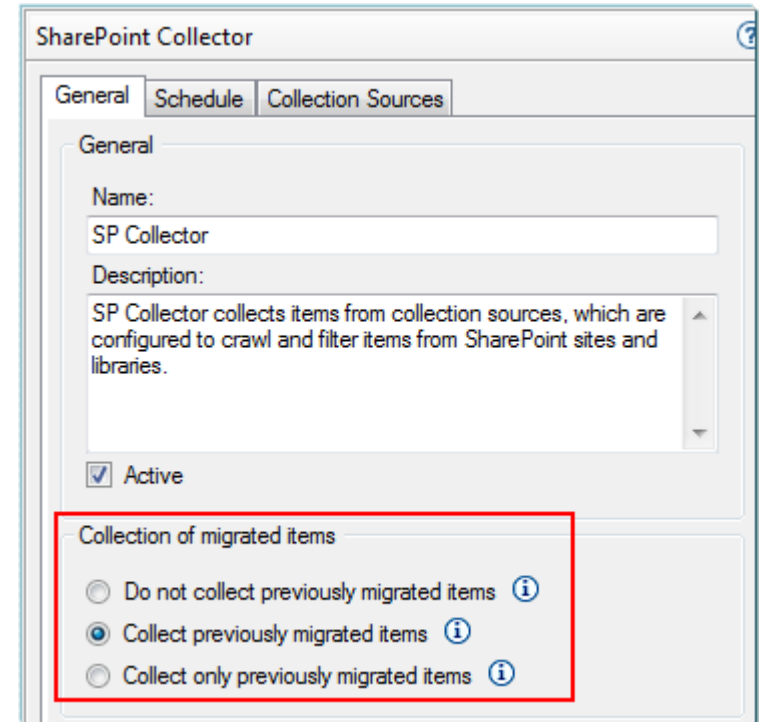
Identify and collect

Supports all list and library types

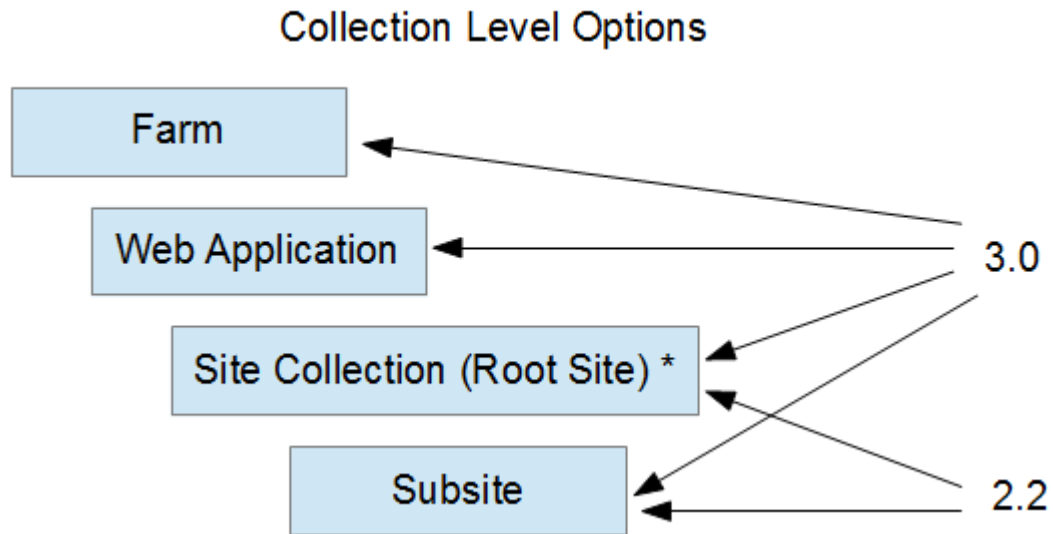
Define collection levels and depth

Options for archiving and re-collection of restored items

Cleanup links in SharePoint when content deleted from the repository



- Collection Level



*Depth counting starts here for web application and farm collection levels.

- All list items (other than documents) are captured as HTML.
- Common list items such as Tasks, Announcement, and Contacts are captured to show the information in the same fashion as the properties view for that item in SharePoint.

Below is an example of an Announcement item as it looks in SharePoint

The image below shows the same announcement item from P8 after it has been collected.

Title	This is an Announcement
Body	This is an Announcement This is an Announcement <i><u>This is an Announcement</u></i> <ul style="list-style-type: none">• <u>one</u>• <u>two</u>• <u>three</u> <p style="text-align: right;"><u>This is right justified.</u></p>
Expires	5/1/2012

Content Type: Announcement
Created at 4/18/2012 11:39 AM by [System Account](#)
Last modified at 4/18/2012 11:39 AM by [System Account](#)

Title	This is an Announcement
Body	This is an Announcement This is an Announcement <i><u>This is an Announcement</u></i> <ul style="list-style-type: none">• <u>one</u>• <u>two</u>• <u>three</u> <p style="text-align: right;"><u>This is right justified.</u></p>
Expires	05/01/2012

Content Type: Announcement
Version: 1.0
Created at 2012-04-18T17:39Z by System Account (SHAREPOINT\system)
Last modified at 2012-04-18T17:39Z by System Account (SHAREPOINT\system)

“Look & Feel” Maintained on Archived Content

Non-binary content stored as HTML renderings

Displayed in “high fidelity”

Original “Discussion” in SharePoint

As Archived by ICC; Rendered in browser

Started: 2012-04-19T00:07Z by System Account (SHAREPOINT\system)

Post photos of your systems/rooms here! (Part 9)
Share photos of your systems/rooms in the discussion thread.

Posted: 2012-04-19T00:09Z by System Account (SHAREPOINT\system)

Some serious rigs going on in this thread. I'd thought I'd share my work in progress.

From: System Account
Posted: 4/18/2012 12:07 PM
Subject: Post photos of your systems/rooms here! (Part 9)

Share photos of your systems/rooms in the discussion thread.

Posted: 2012-04-19T00:10Z by System Account (SHAREPOINT\system)

Very nice. Clean. Refined.

Threading

Started: 4/18/2012 12:07 PM by System Account

Post photos of your systems/rooms here! (Part 9)
Share photos of your systems/rooms in the discussion thread.

Posted: 4/18/2012 12:09 PM by System Account

Some serious rigs going on in this thread. I'd thought I'd share my work in progress.

[Show Quoted Messages](#)

Posted: 4/18/2012 12:10 PM by System Account

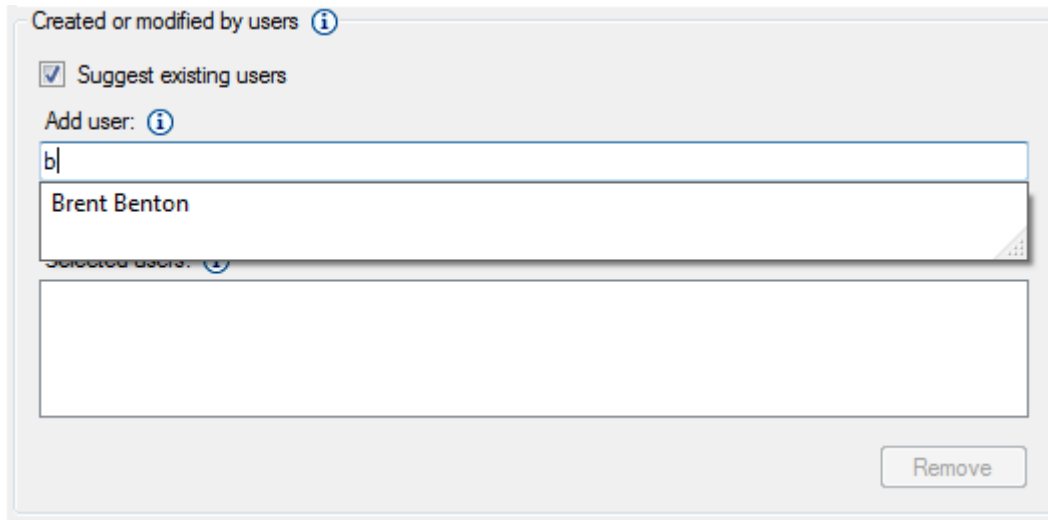
Very nice. Clean. Refined.

[Show Quoted Messages](#)

The filter will check all versions of a SharePoint item.

For example, if you have an item that was created by Bach and then modified by Beethoven and then further modified by Brahms, any one of these names in the filter will have the SharePoint collector pick up this item.

You can select to have the user list retrieved for auto-suggest functionality.



Created or modified by users ⓘ

Suggest existing users

Add user: ⓘ

b|

Brent Benton

Selected users: ⓘ

Remove

Background



Streamline and
Extend

Simple and
Flexible

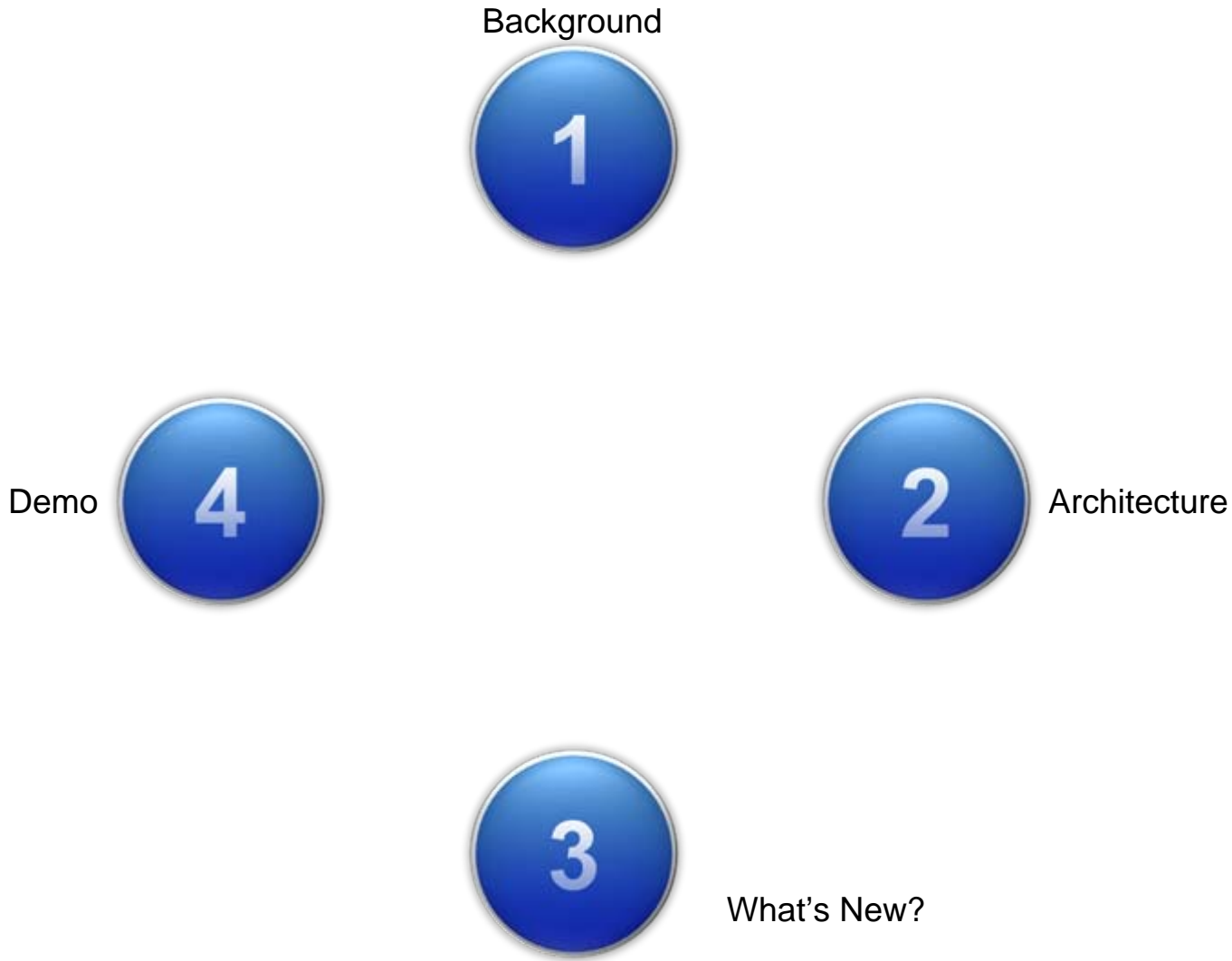
Control
Everything!

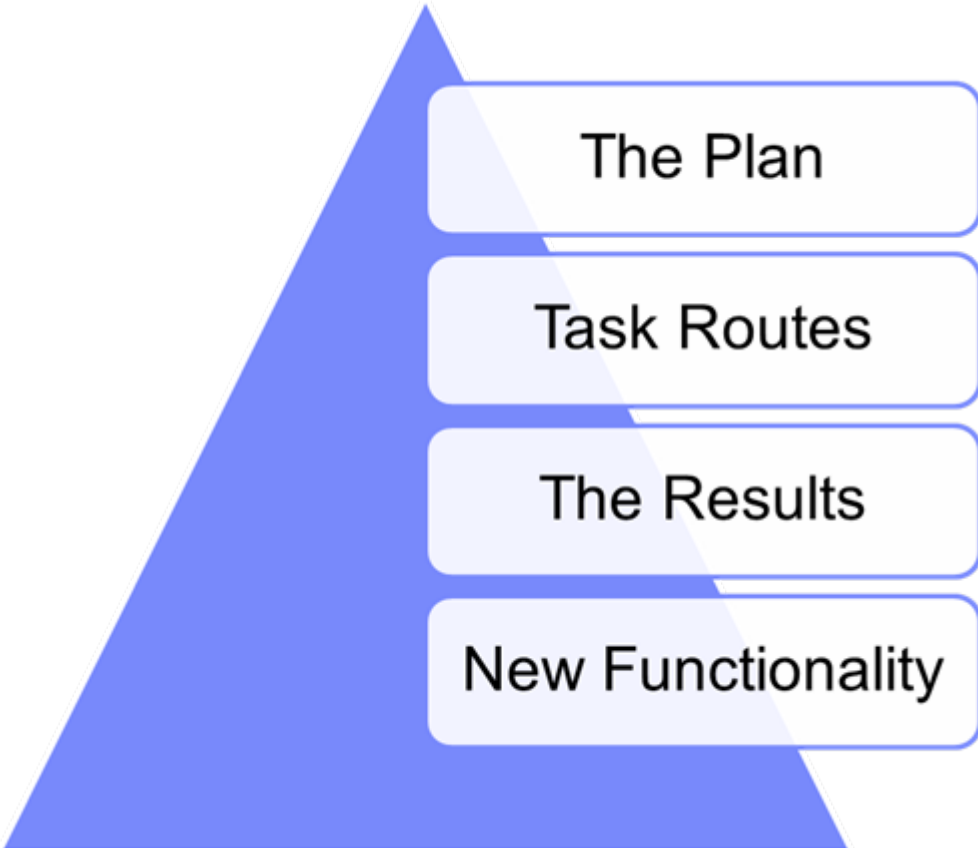


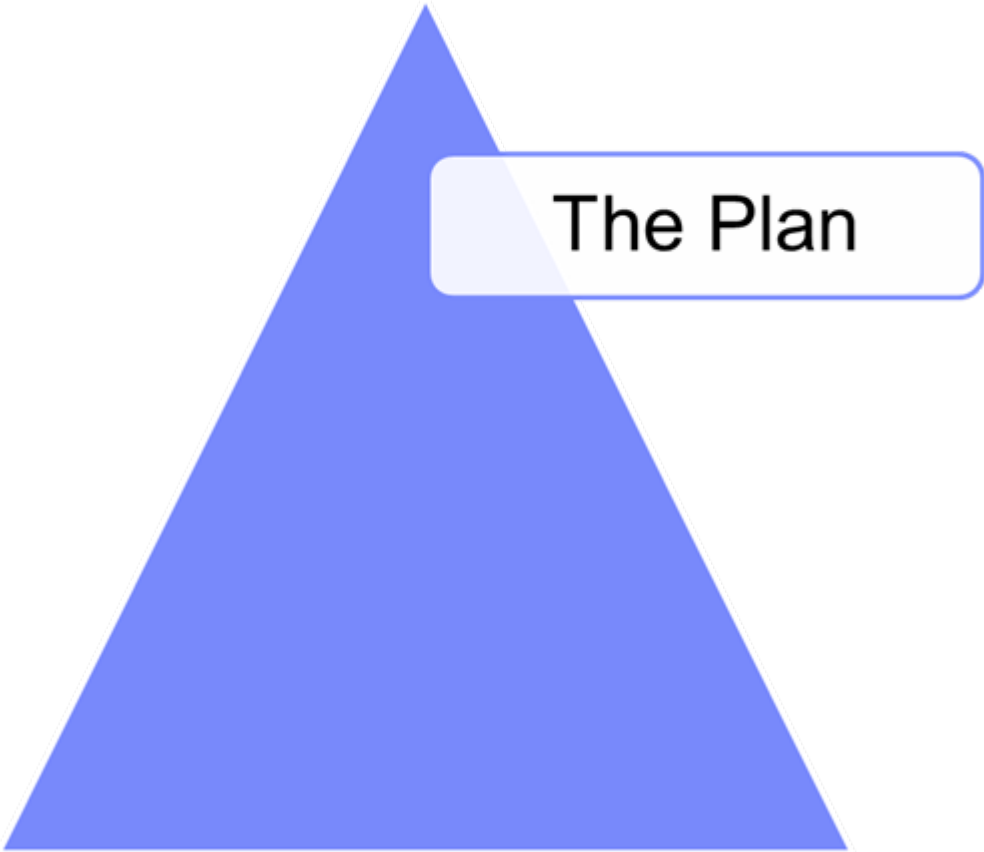
Architecture

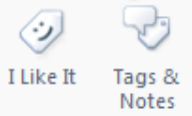
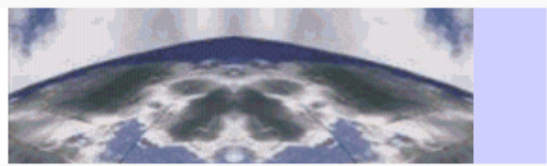
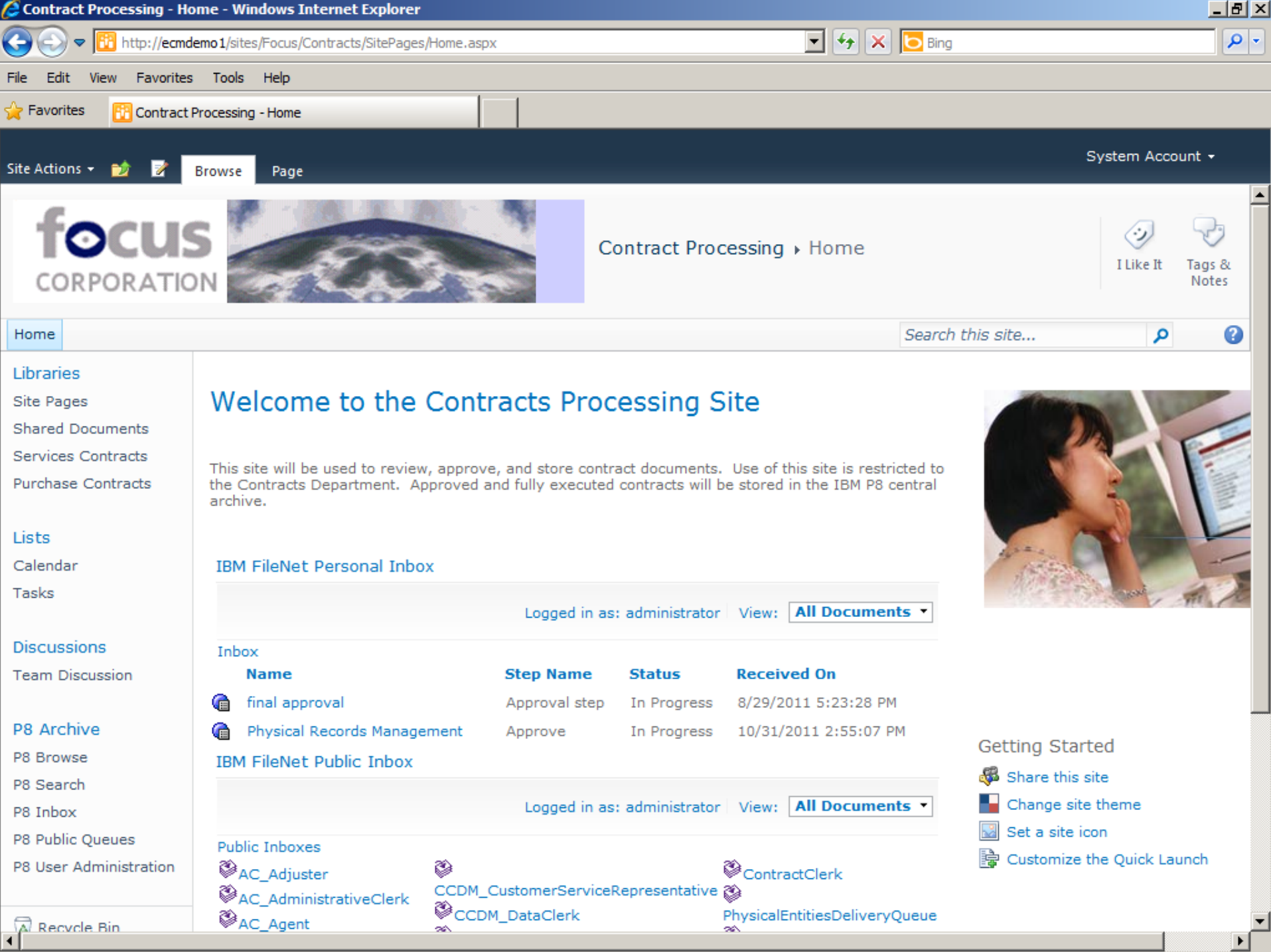


What's New?









- Libraries
 - Site Pages
 - Shared Documents
 - Services Contracts
 - Purchase Contracts
- Lists
 - Calendar
 - Tasks
- Discussions
 - Team Discussion
- P8 Archive
 - P8 Browse
 - P8 Search
 - P8 Inbox
 - P8 Public Queues
 - P8 User Administration

Welcome to the Contracts Processing Site

This site will be used to review, approve, and store contract documents. Use of this site is restricted to the Contracts Department. Approved and fully executed contracts will be stored in the IBM P8 central archive.

IBM FileNet Personal Inbox

Logged in as: administrator View: All Documents

Inbox

Name	Step Name	Status	Received On
final approval	Approval step	In Progress	8/29/2011 5:23:28 PM
Physical Records Management	Approve	In Progress	10/31/2011 2:55:07 PM

IBM FileNet Public Inbox

Logged in as: administrator View: All Documents

Public Inboxes

- AC_Adjuster
- AC_AdministrativeClerk
- AC_Agent
- CCDM_CustomerServiceRepresentative
- CCDM_DataClerk
- ContractClerk
- PhysicalEntitiesDeliveryQueue



Getting Started

- Share this site
- Change site theme
- Set a site icon
- Customize the Quick Launch

- Site Actions
- Libraries
- Site Pages
- Shared Documents
- Services Contracts**
- Purchase Contracts
- Lists
- Calendar
- Tasks
- Discussions
- Team Discussion
- P8 Archive
- P8 Browse
- P8 Search
- P8 Inbox
- P8 Public Queues
- P8 User Administration
- Recycle Bin
- All Site Content

Type	Name	Contract Amount	Vendor Name	State/Province	Status
Folder	Expiring Contracts				
Folder	Incoming Contracts				
Document	ABC-010001	\$45,000.00	ABC Services	Oregon	Final
Document	ABC-010002	\$55,000.00	ABC Services	Oregon	Final
Document	ACE-020001	\$23,000.00	ACE Corp	Iowa	Final
Document	FXM-020002	\$74,000.00	FXM Corp	Nebraska	Final
Document	FXM-030001	\$83,000.00	FXM Corp	Nebraska	Final
Document	IBM-030002	\$67,000.00	IBM	New York	Published
Document	IBM-030003	\$87,000.00	IBM	New York	Published
Document	IBM-090001	\$34,000.00	IBM	New York	Published
Document	LAL-040001	\$89,000.00	Larson and Larson	Kansas	Final
Document	LAL-040002	\$28,000.00	Larson and Larson	Kansas	Final
Document	PAE-040003	\$49,000.00	Palo Engineering	So Dakota	Final

+ Add document

Approved Services Contracts

New Document | New Folder

Logged in as: administrator View: **All Documents**

Type	Name	Content Size	Date Last Modified	Last Modifier
Refresh				Logged in as: administrator

Type	Name	Date Last Modified	Last Modifier
Physical Record Management	Physical Record Management	10/31/2011 2:42 PM	Administrator

- Site Actions
- Libraries
- Site Pages
- Shared Documents
- Services Contracts
- Purchase Contracts
- Lists
- Calendar
- Tasks
- Discussions
- Team Discussion
- P8 Archive
- P8 Browse
- P8 Search
- P8 Inbox
- P8 Public Queues
- P8 User Administration
- Recycle Bin
- All Site Content

Type	Name	Contract Amount	Vendor Name	State/Province	Status
Folder	Expiring Contracts				
Folder	Incoming Contracts				
Document	ABC-010001	\$45,000.00	ABC Services	Oregon	Final
Document		\$55,000.00	ABC Services	Oregon	Final
Document		\$23,000.00	ACE Corp	Iowa	Final
Document		\$74,000.00	FXM Corp	Nebraska	Loading Final
Document		\$83,000.00	FXM Corp	Nebraska	Final
Document		\$67,000.00	IBM	New York	Published
Document		\$87,000.00	IBM	New York	Published
Document		\$34,000.00	IBM	New York	Published
Document		\$89,000.00	Larson and Larson	Kansas	Final
Document		\$28,000.00	Larson and Larson	Kansas	Final
Document	PAE-040003	\$49,000.00	Palo Engineering	So Dakota	Final

- View Properties
- Edit Properties
- Edit in Microsoft Word
- Check Out
- Version History
- Send To
- Compliance Details
- Manage Permissions
- Delete

+ Add document

Approved Services Contracts

New Document | New Folder

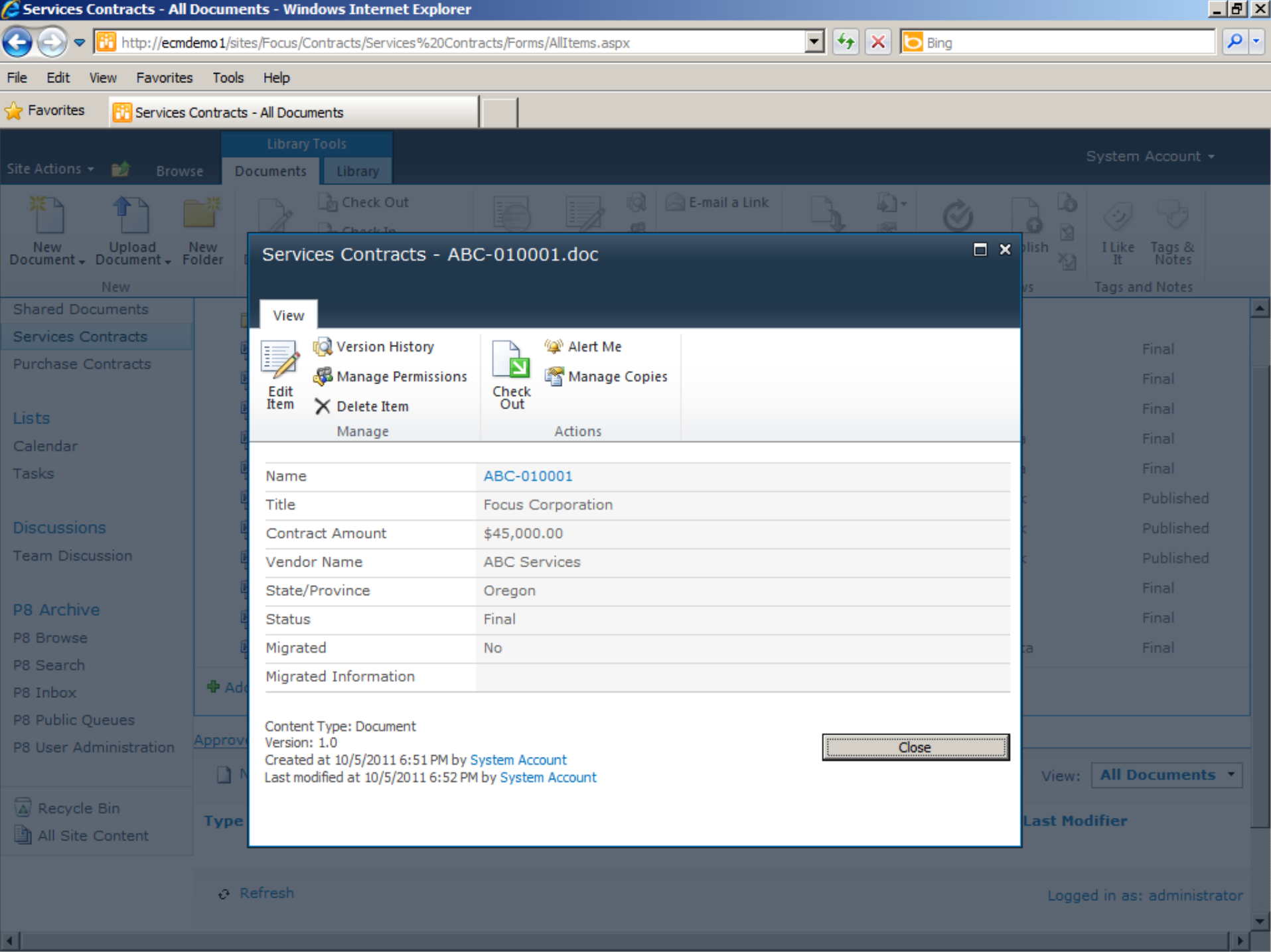
Logged in as: administrator View: All Documents

Type	Name	Content Size	Date Last Modified	Last Modifier
------	------	--------------	--------------------	---------------

Refresh

Logged in as: administrator

Type	Name	Date Last Modified	Last Modifier
Physical Record Management	Physical Record Management	10/31/2011 2:42 PM	Administrator



Services Contracts - ABC-010001.doc

View

Edit Item	Version History	Check Out	Alert Me
Delete Item	Manage Permissions	Manage Copies	
Manage		Actions	

Name	ABC-010001
Title	Focus Corporation
Contract Amount	\$45,000.00
Vendor Name	ABC Services
State/Province	Oregon
Status	Final
Migrated	No
Migrated Information	

Content Type: Document
 Version: 1.0
 Created at 10/5/2011 6:51 PM by System Account
 Last modified at 10/5/2011 6:52 PM by System Account

Close

File Edit View

Services (Local)

Services (Local)

IBM Content Collector Task Routing Engine

[Start](#) the service

Description:
Controls other IBM Content Collector services

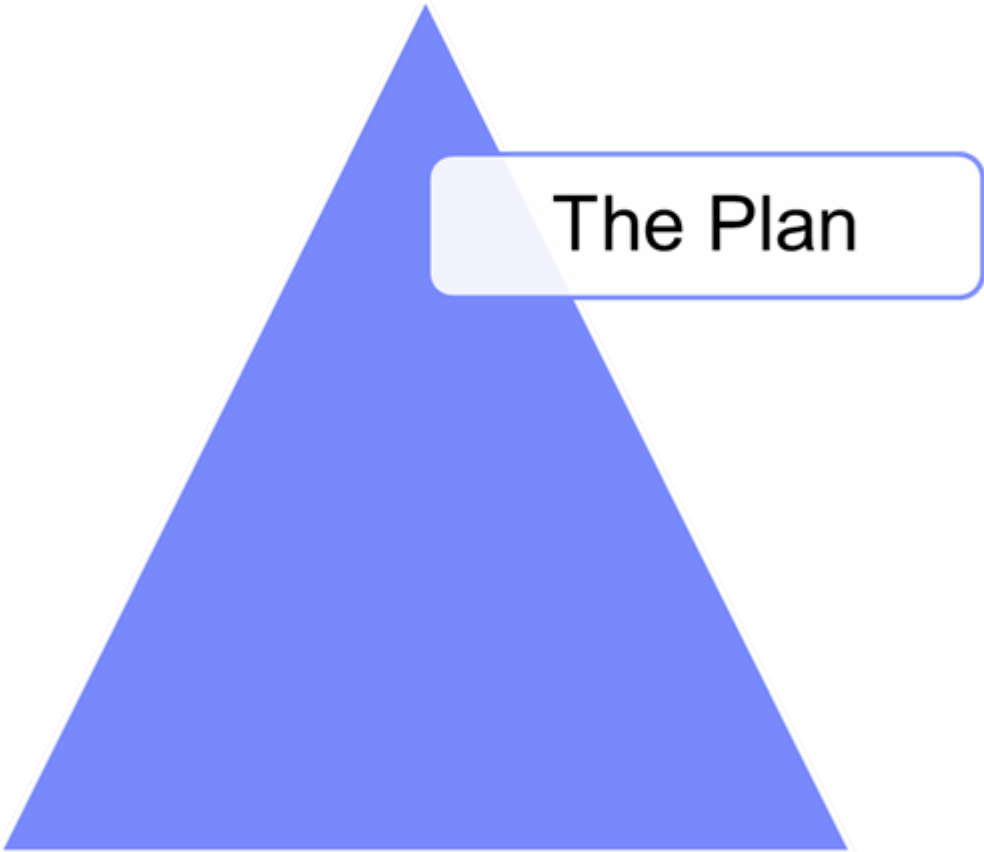
Name	Description	Status	Startup T
IBM Cognos	Enables th...		Manual
IBM Content Analytics			Manual
IBM Content Collector File System Repository C...	Enables IB...		Manual
IBM Content Collector FileNet P8 Connector	Enables IB...		Manual
IBM Content Collector Information Help Center	Controls th...		Automati
IBM Content Collector SharePoint Connector	Enables IB...		Manual
IBM Content Collector Task Routing Eng			Manual
IBM Content Collector Text Extraction C	IB...		Manual
IBM Content Collector Utility Connector	in...		Manual
IBM Content Collector Web Application	th...	Started	Automati
IBM HTTP Administration 7.0	P...		Manual
IBM HTTP Server 7.0	P...		Manual
IBM WebSphere Application Server V7.0	th...	Started	Automati
IBM WebSphere Application Server V7.0	th...		Manual
IBM WebSphere Application Server V7.0	th...		Manual
IBM WebSphere Application Server V7.0	th...		Manual
IBM WebSphere Application Server V7.0	th...		Manual
IBM WebSphere Application Server V7.0	th...		Manual
IIS Admin Service	Enables thi...	Started	Automati
IKE and AuthIP IPsec Keying Modules	The IKEEX...	Started	Automati
InstallDriver Table Manager	Provides s...		Manual
Interactive Services Detection	Enables us...		Disabled
Internet Connection Sharing (ICS)	Provides n...		Disabled
Intersite Messaging	Enables me...	Started	Automati

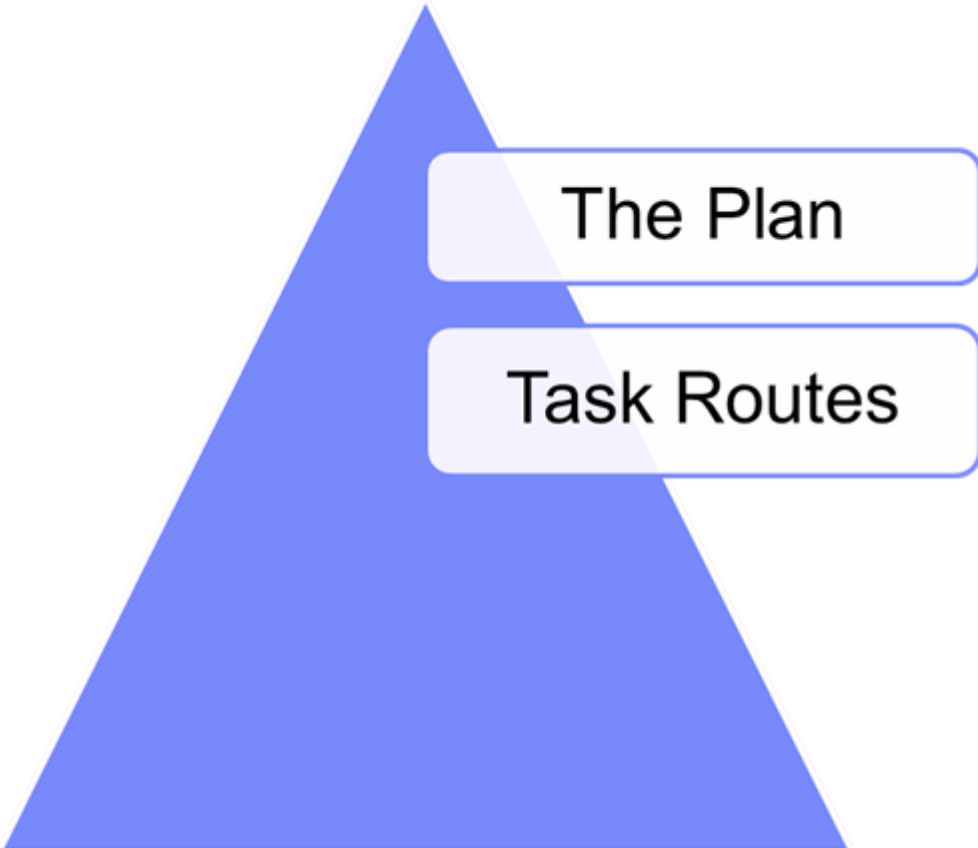
Start service IBM Content Collector Task Routing Engine on Local Computer

Type	Name	Content Size	Date Last Modified	Last Modified
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Refresh

Logged in as: administrator







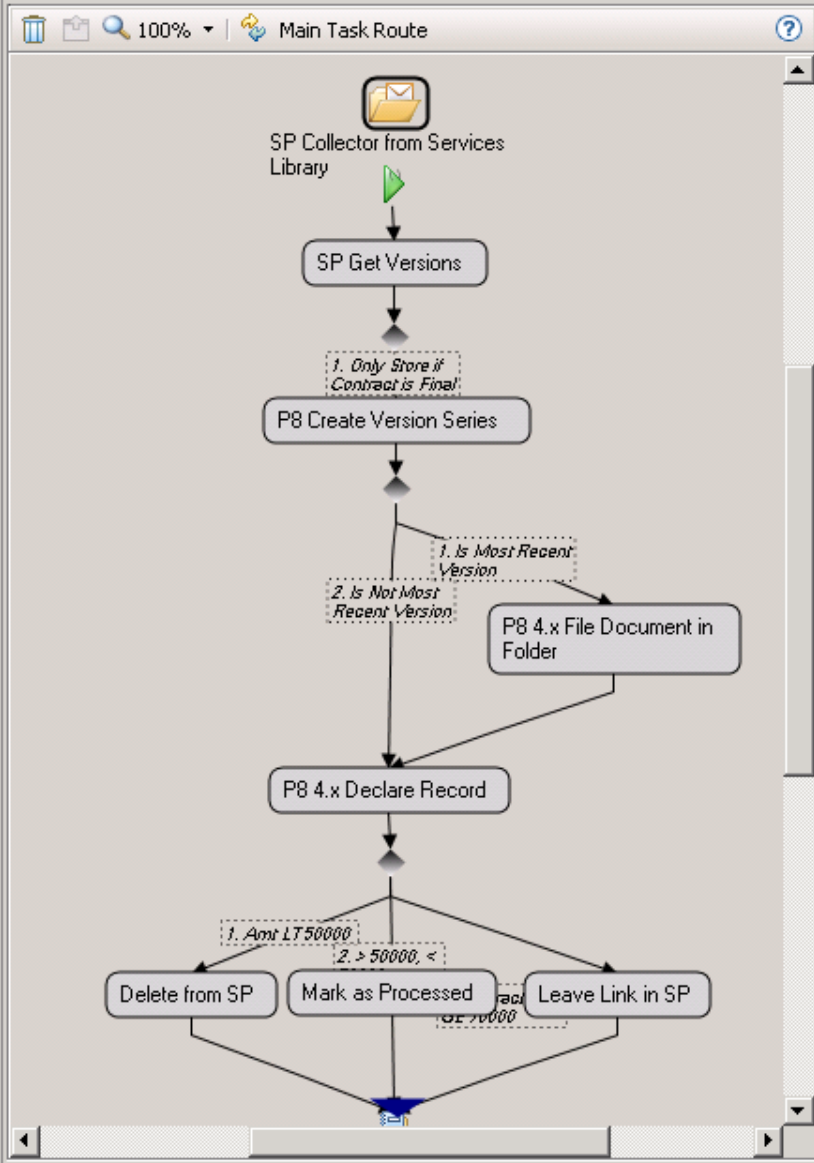
Explorer ?

- Bulk load iccexos files (Replic...
- Bulk load, collect files (delete)
- Bulk load, collect PST
- EX Archiving (Content Search...
- EX Auto Declaration from ???...
- EX Classification Full Text Re...
- EX Collect PST Classification ...
- Folder BPM Email Metadata R...
- FS Statistics Collection
- FS to P8 Archiving (Declare a...
- SP Statistics Collection
- SP to P8 - With Vendor ...**
- SP to P8 - With Versions

Toolbox ?

- Link
- Audit Log
- Email**
- File System Repository**
- File System Source**
- IBM Connections**
- IBM FileNet P8**
- Metadata Form**
- SharePoint**
- SP Collector
- SP Create File
- SP Get Versions
- SP Manage Link
- SP Post-processing
- SMTP**
- Text Extraction**
- Utility**

SP to P8 - With Vendor ...



SharePoint Collector

General | Schedule | Collection Sources

General

Name: SP Collector from Services Library

Description: SP Collector collects documents from collection sources, which are configured to crawl and filter documents from SharePoint sites and libraries.

Active

Collection of migrated items

- Do not collect previously migrated items *i*
- Collect previously migrated items *i*
- Collect only previously migrated items *i*

Metadata

Add user-defined metadata to output: *i*

SharePoint Generic Defn

Retain IDs in values: *i*

ID and value delimiter: *i*

Multiple values delimiter: *i*

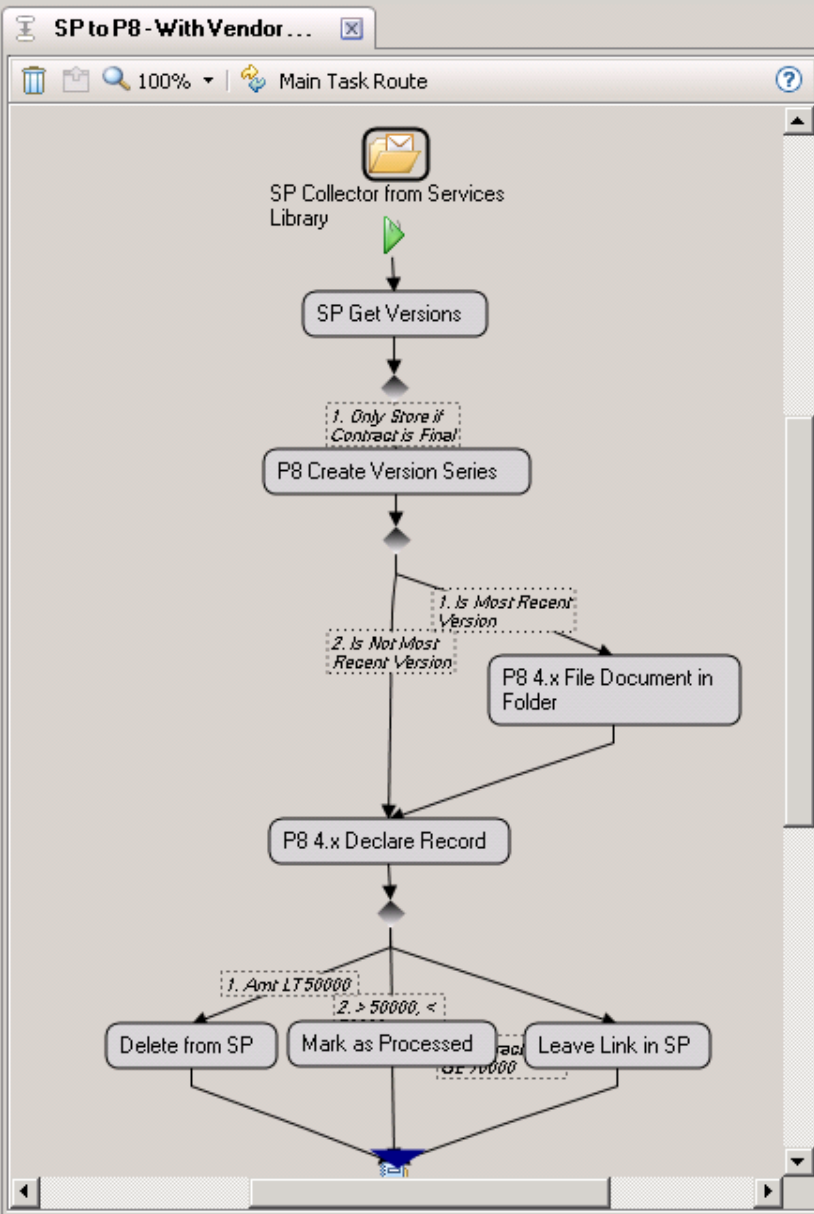


Explorer ?

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SharePoint Collector

General Schedule Collection Sources

This collector runs:

Once

Run Time

Start date: 1/11/2011 6:00 PM

End date: 1/10/2011 6:00 PM

When task completes

When task completes or on:



- Bulk load iccexos files (Replic...
- Bulk load, collect files (delete)
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- Utility**

Site connection ⓘ

SP Contract Processing

Refresh site content

Locations | Filters | Columns | Read-Only Exceptions | Advanced |

Collection level

Collect from:

- Site ⓘ
- Web application ⓘ
- Farm ⓘ

Collection depth

Collect from:

- All sites and subsites ⓘ
- Site and subsites to a depth of: ⓘ

1

Libraries and Lists

Collect from:

- All libraries and lists ⓘ
- Select libraries and lists ⓘ

Select one or more libraries or lists to collect items from:

Library or List Name	Library or List Type
<input type="checkbox"/> Announcements	Announcements
<input type="checkbox"/> Calendar	Events List
<input type="checkbox"/> Customized Reports	Document Library
<input type="checkbox"/> Form Templates	Document Library
<input type="checkbox"/> Links	Links List
<input type="checkbox"/> Purchase Contracts	Document Library
<input checked="" type="checkbox"/> Service Contracts	Document Library
<input type="checkbox"/> Shared Documents	Document Library
<input type="checkbox"/> Site Assets	Document Library

OK

Cancel



- Bulk load iccexos files (Replic...
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- EX Classification Full Text Re...
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- SMTTP**
- Text Extraction**
- Utility**

Edit Collection Source

Site connection ⓘ

SP Contract Processing

Refresh site content

Locations Filters Columns Read-Only Exceptions Advanced

Content types ⓘ

- Contact
- Contract
- Discussion
- Document
- Dublin Core Columns
- East Asia Contact

 Content type inheritance ⓘ

Folder ⓘ

Start collection in:

- Root folder
- Specific folder path:

Created or modified by users ⓘ

 Suggest existing users

Add user: ⓘ

Add

Selected users: ⓘ

Remove

OK

Cancel



- Bulk load iccexos files (Replic...
- Bulk load, collect files (delete)
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Site connection ⓘ

SP Contract Processing

Refresh site content

Locations Filters Columns Read-Only Exceptions Advanced

Map columns to metadata

Metadata ⓘ SharePoint Generic Defn

source:

Site or list ⓘ Site

Column: State/Province

Column	Inherited	Metadata Property	Data Type
State/Province	No	State/Province	String
Status	No	Status	String
Vendor Name	No	Vendor Name	String
Contract Amount	No	Contract Amount	Float

OK

Cancel

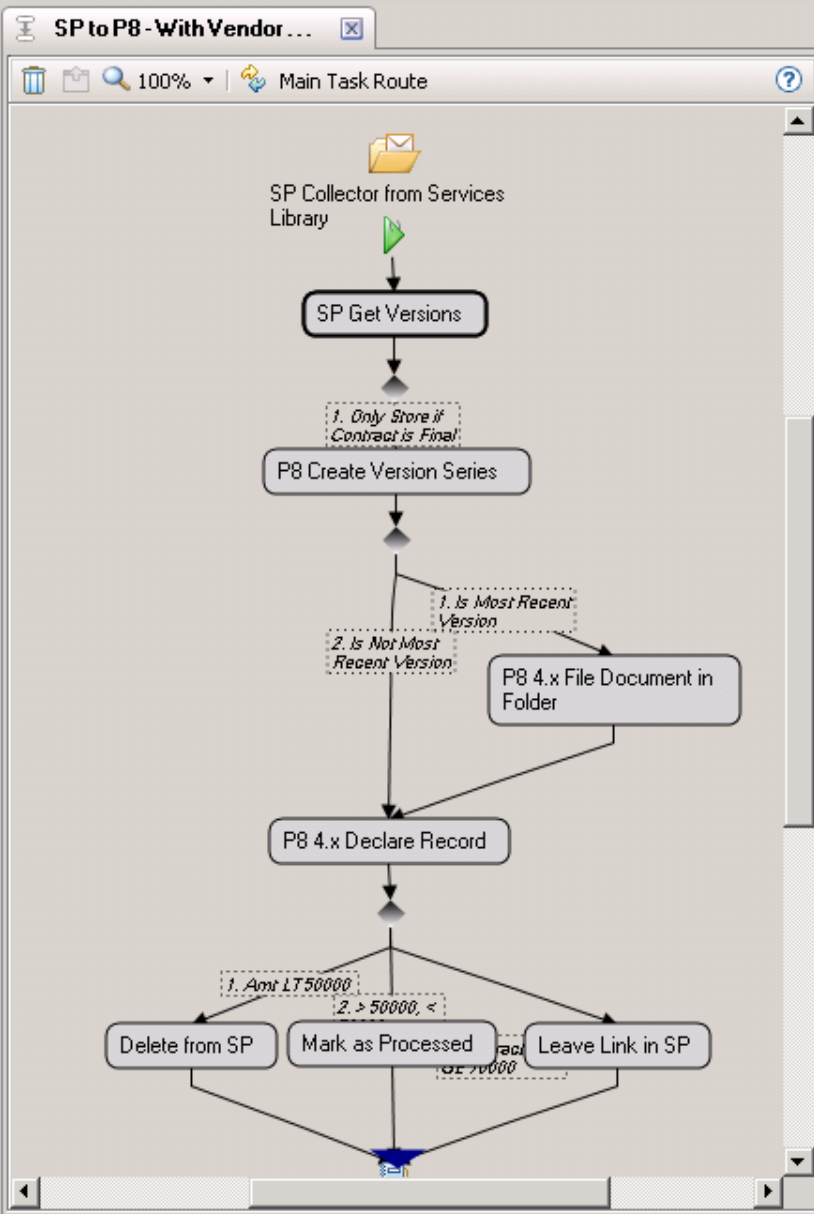


Explorer ?

- Bulk load iccexos files (Replic...
- Bulk load, collect files (delete)
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Toolbox ?

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- Text Extraction**
- Utility**



SP Get Versions

General

Name: SP Get Versions

Description: SP Get Versions specifies how many versions of each SharePoint document the task route processes.

Versions

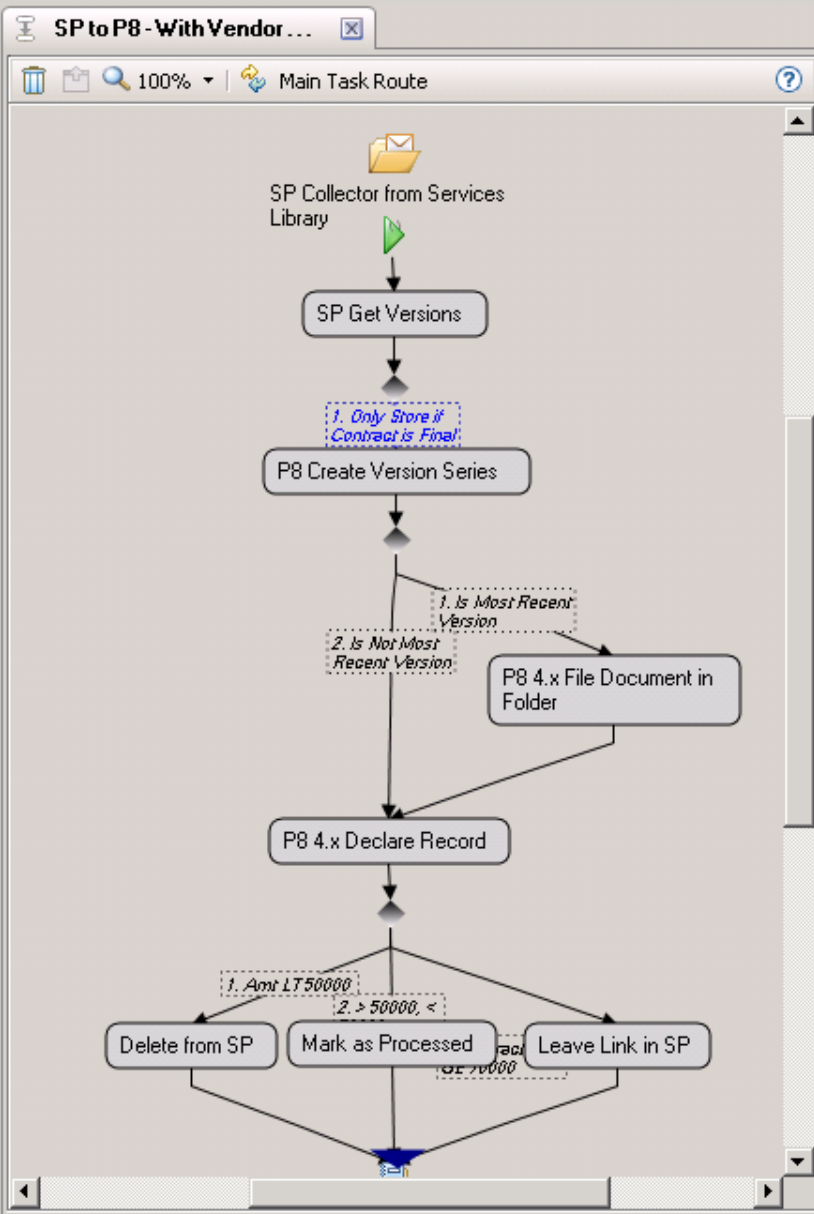
All versions *i*

1 versions *i*



- Explorer
- Bulk load iccexos files (Replic...
 - Bulk load, collect files (delete)
 - Bulk load, collect PST
 - EX Archiving (Content Search...
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- Toolbox
- Link
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 - SharePoint**
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 - Text Extraction**
 - Utility**



Rule

General

Name: Only Store if Contract is Final

Description:

Configure Rule

Specify rule evaluation criteria: **i**

Always true **i**

Advanced **i**

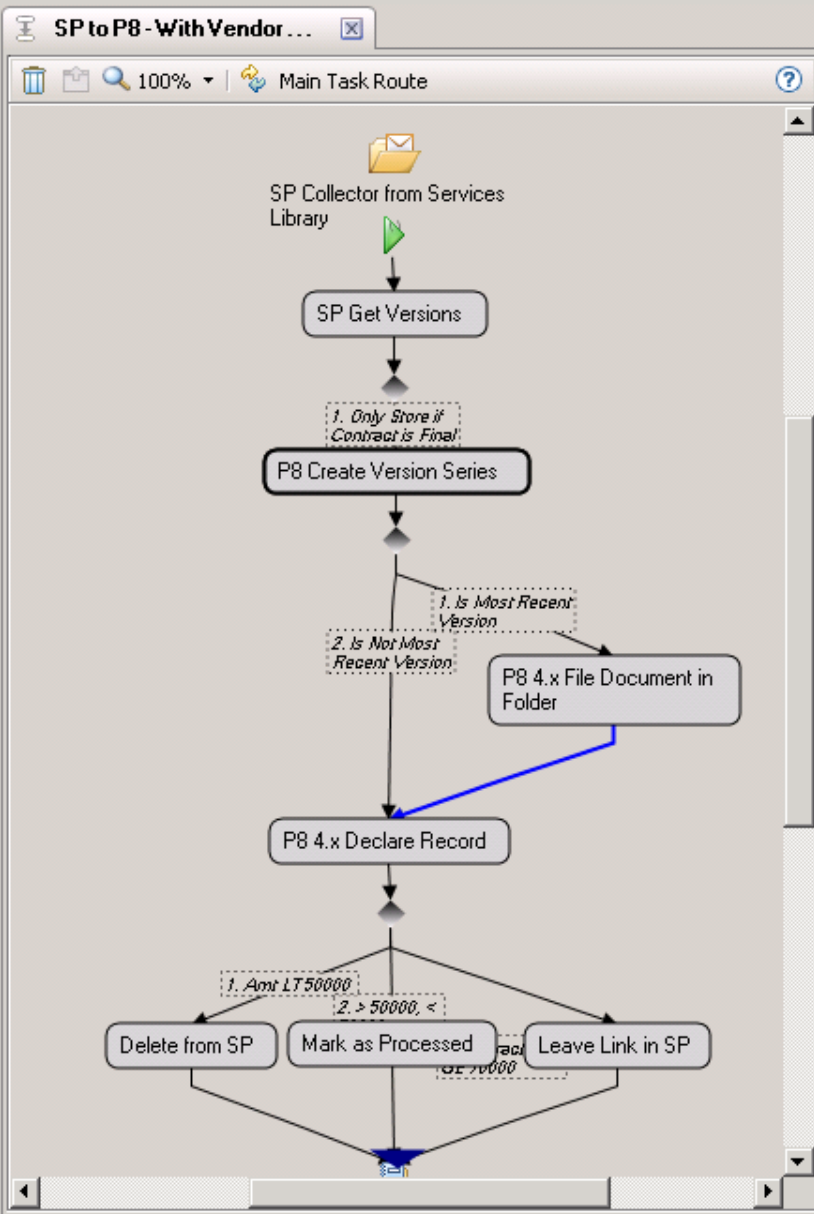
```

IEqual(
  "Final",
  <SharePoint Generic Defn, Status>)
  
```



- Explorer
- Bulk load iccxos files (Replic...
 - Bulk load, collect files (delete)
 - Bulk load, collect PST
 - EX Archiving (Content Search...
 - EX Auto Declaration from ???...
 - EX Classification Full Text Re...
 - EX Collect PST Classification ...
 - Folder BPM Email Metadata R...
 - FS Statistics Collection
 - FS to P8 Archiving (Declare a...
 - SP Statistics Collection
 - SP to P8 - With Vendor ...**
 - SP to P8 - With Versions

- Toolbox
- Link
 - Audit Log
 - Email**
 - File System Repository**
 - File System Source**
 - IBM Connections**
 - IBM FileNet P8**
 - Metadata Form**
 - SharePoint**
 - SP Collector
 - SP Create File
 - SP Get Versions
 - SP Manage Link
 - SP Post-processing
 - SMTP**
 - Text Extraction**
 - Utility**



P8 Create Version Series

P8 Connection

Connection: P8 Connection

Object store: ICCEXDS
User name: p8admin

Checkin Options

Auto classify

Content capture options:

Transfer content (default)

Reference external content

Do not transfer content (contentless)

Add multiple content elements

Set content retrieval name

Retrieval name metadata mapping:

Source: Property:

Shortcut link:

Property Mappings

Document class: ICCSharepointInstance 2

Show "Hidden Properties"

Property	Value
Document Title	<SP Collection, Name>
ICCCategory	

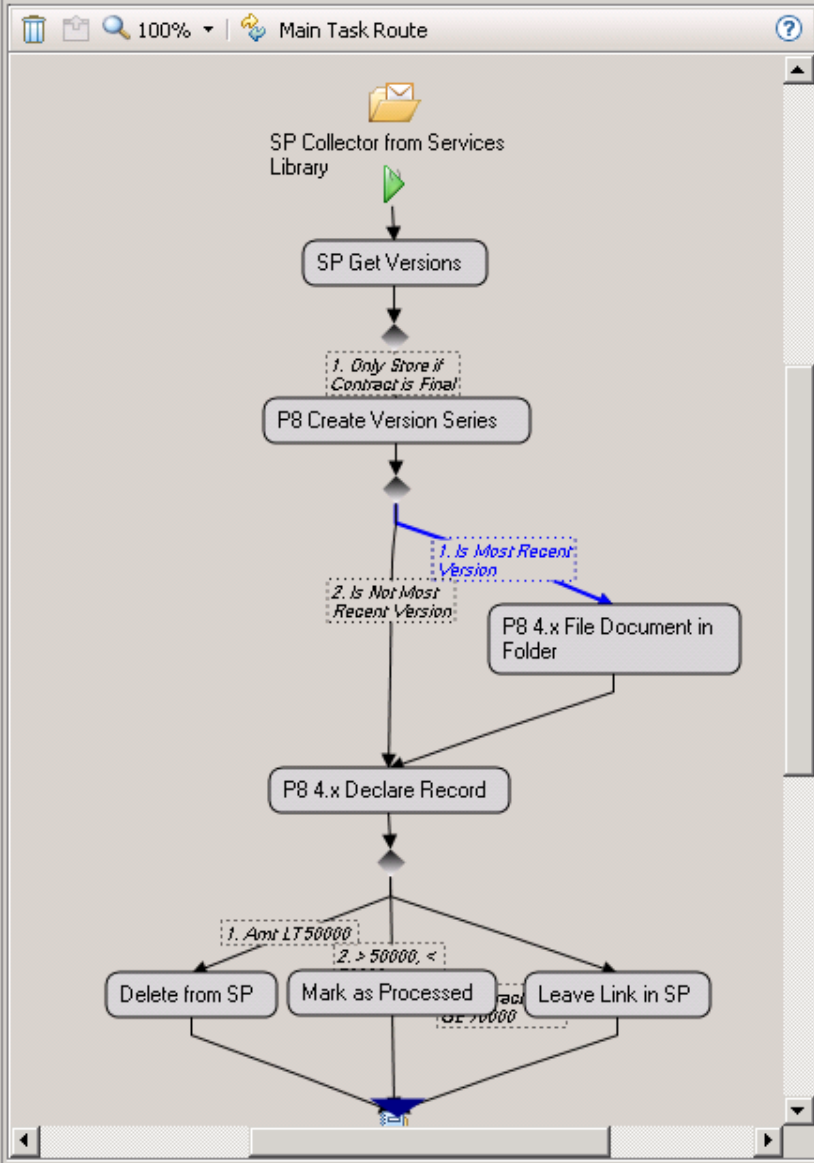
Explorer

- Bulk load iccxos files (Replic...
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- Bulk load, collect PST
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- Utility**

SP to P8 - With Vendor ...



Rule

General

Name:

Description:

Configure Rule

Specify rule evaluation criteria:

Always true

 Advanced

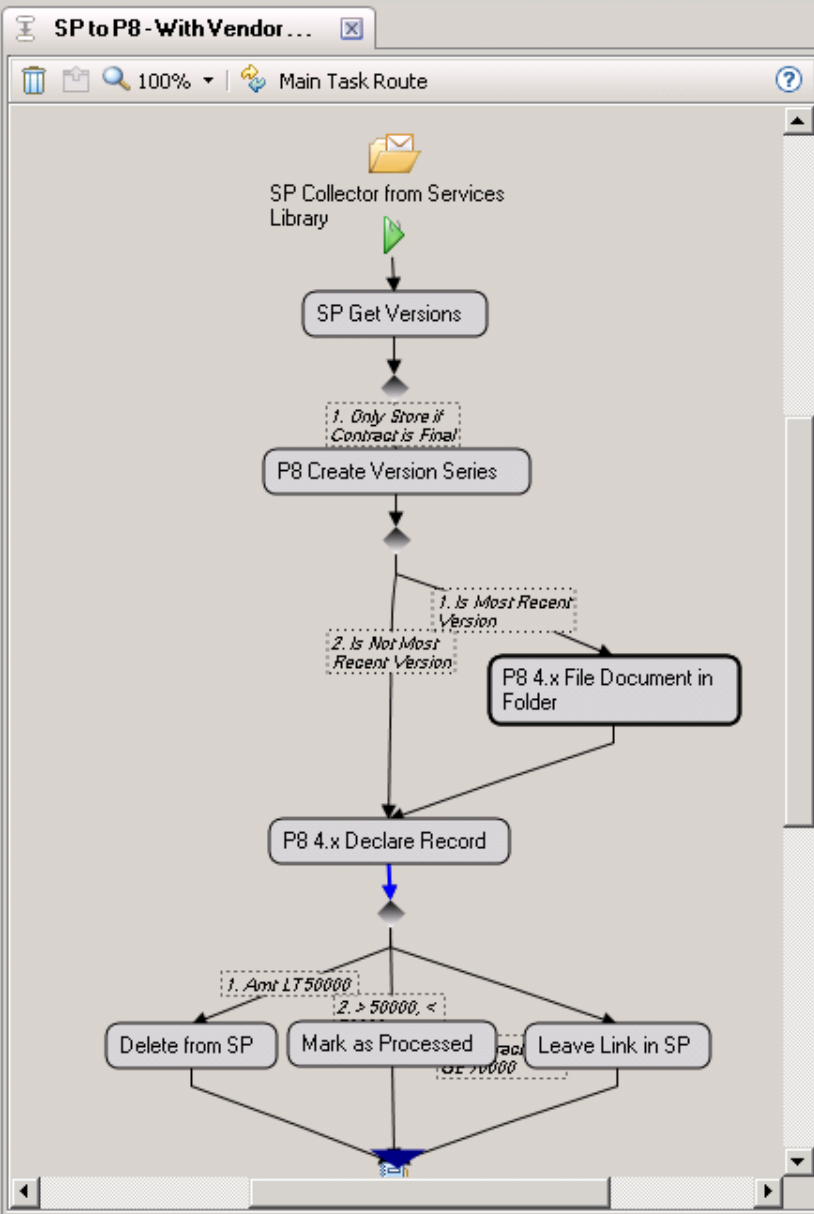
```

    And(
      Equal(
        TRUE,
        <SP Collection, Last Version>,
      ),
      Equal(
        FALSE,
        <Re-collection, Re-collection Flag>))
    
```



- Explorer
- Bulk load iccexos files (Replic...
 - Bulk load, collect files (delete)
 - Bulk load, collect PST
 - EX Archiving (Content Search...
 - EX Auto Declaration from ???...
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 - Utility**



P8 File Document In Folder

General

Name: P8 4.x File Document in Folder

Description: This task saves document objects to specific repository folders to facilitate search and retrieval.

P8 Connection

Connection: P8 Connection

Object store: ICCEXOS

User name: p8admin

File in Folder Options

Folder path: Add(/)/Contracts/Approved Services Contracts/"<SharePoint Ge

Edit... Add... Remove

Create folder if it does not exist

Inherit folder security:

- Set security parent of document to folder
- Add folder security to document security

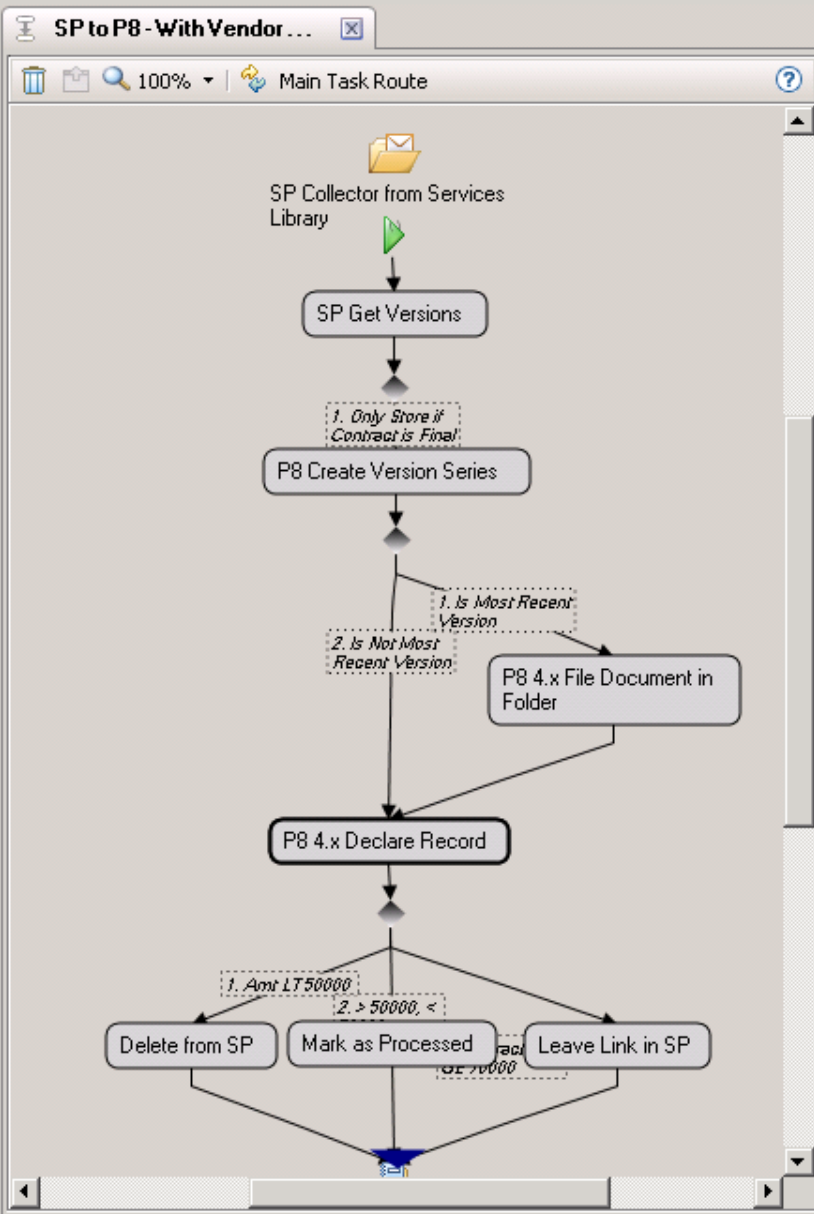


Explorer

- Bulk load iccxos files (Replic...
- Bulk load, collect files (delete)
- Bulk load, collect PST
- EX Archiving (Content Search...
- EX Auto Declaration from ???...
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Toolbox

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- Email**
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- SMTP**
- Text Extraction**
- Utility**



P8 Declare Record

General

Name: P8 4.x Declare Record

Description: This task enables records declaration in IBM FileNet Records Manager.

P8 Connection

Connection: FPOS

Object store: FPOS

User name: p8admin

Configure Classifications

Classifications: Configured Classifications

"/Records Management/Corporate File Plan/..."

Buttons: Add... Edit... Remove

Property Mappings

Record Class: Contract Record

Show "Hidden Properties"

Property	Value
Document Title	<SP Collection, Name>



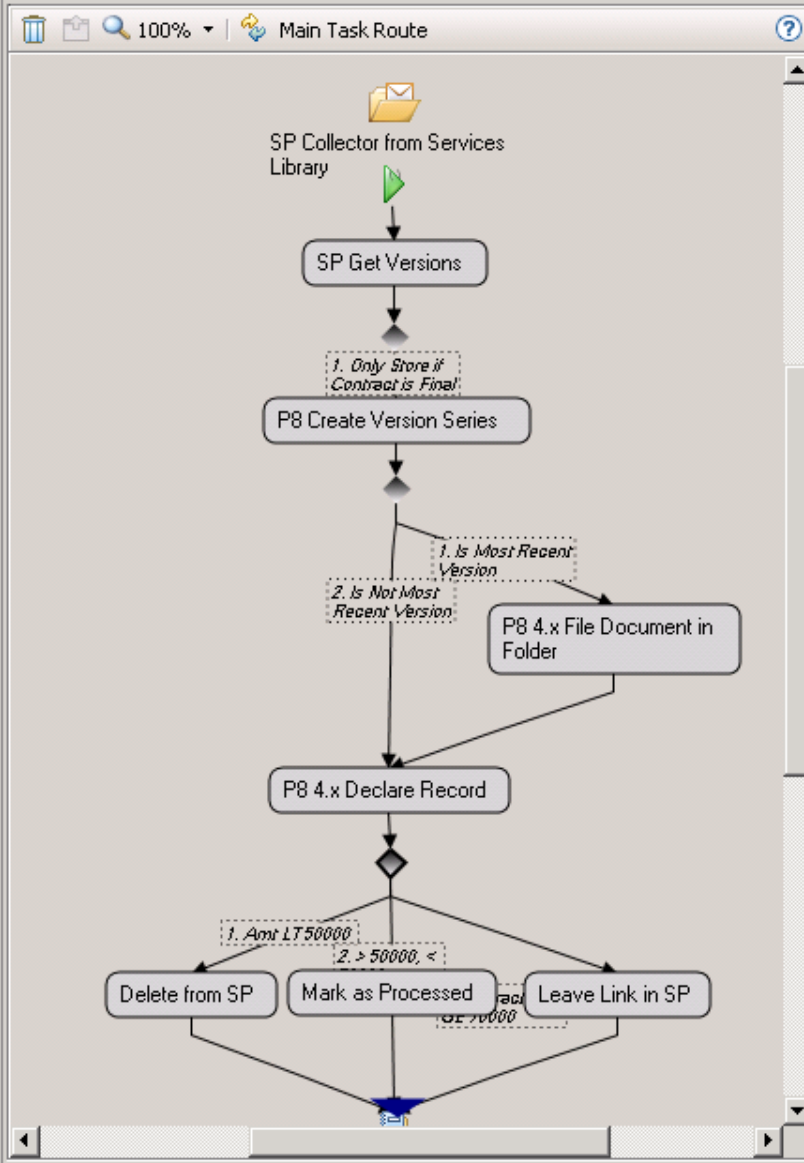
Explorer ?

- Bulk load iccexos files (Replic...
- Bulk load, collect files (delete)
- Bulk load, collect PST
- EX Archiving (Content Search...
- EX Auto Declaration from ???...
- EX Classification Full Text Re...
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Toolbox ?

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- SP Get Versions
- SP Manage Link
- SP Post-processing
- SMTP**
- Text Extraction**
- Utility**

SP to P8 - With Vendor ...



Rule Order

- Evaluation order
- Amt LT 50000
 - > 50000, < 70000
 - Contract Amt GE 70000



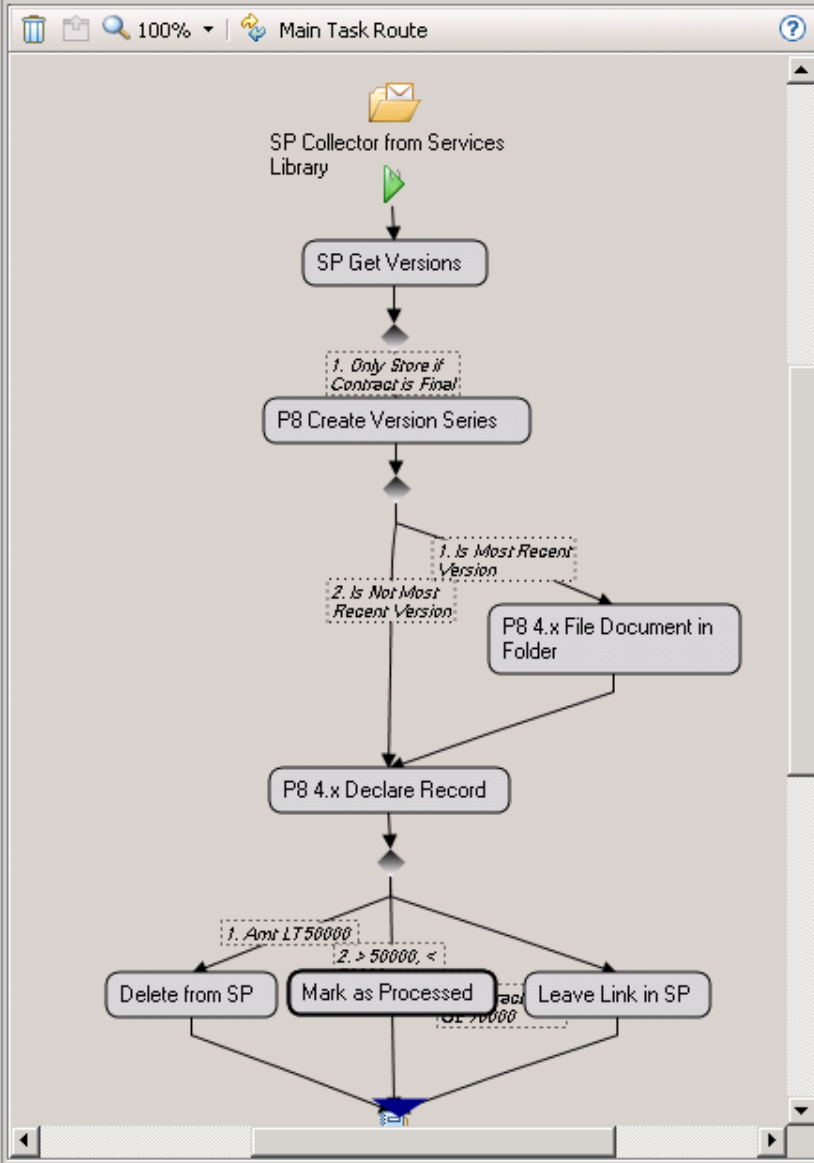
Explorer ?

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- Bulk load, collect PST
- EX Archiving (Content Search...
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- Utility**

SP to P8 - With Vendor ...



SP Post-processing

General

Name:

Description:

Item retention in SharePoint

Leave Item *i*

Make item read-only (with exceptions) *i*

Replace with link *i*

Delete *i*

Version retention in SharePoint

All versions *i*

Most recent version only *i*



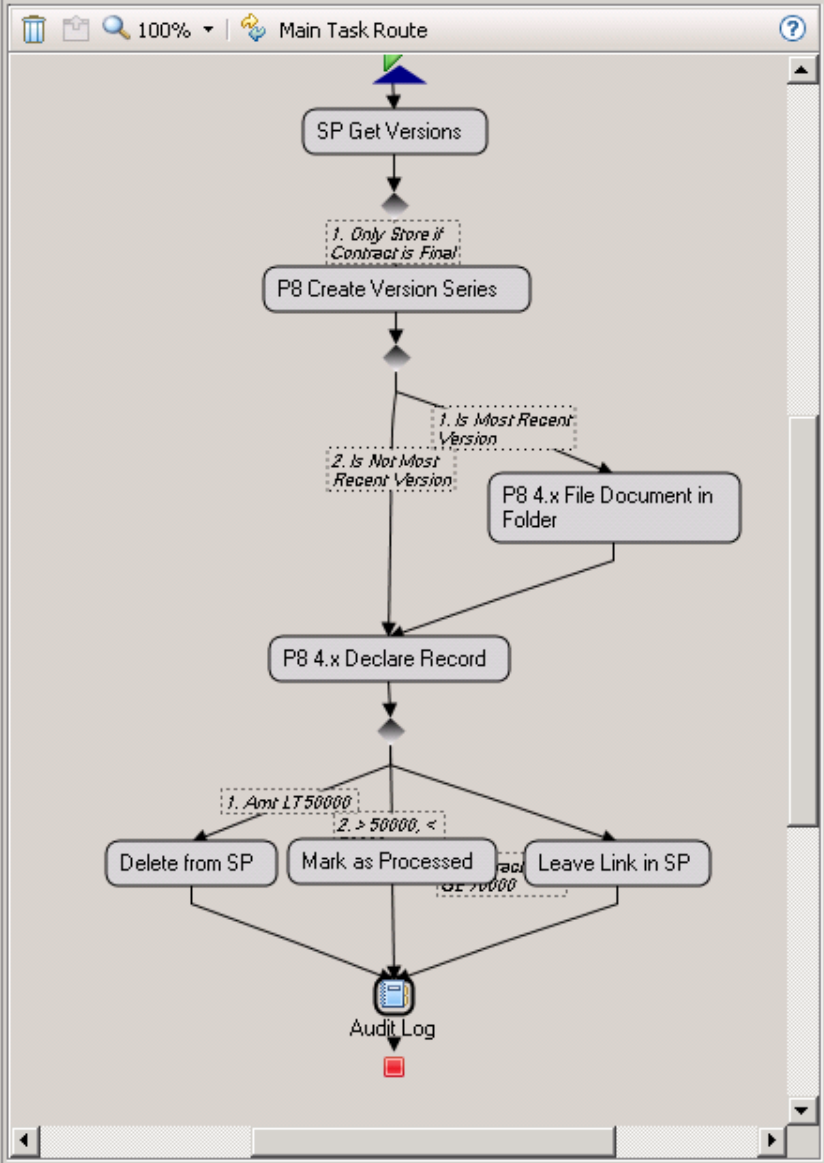
Explorer ?

- Bulk load iccxos files (Replic...
- Bulk load, collect files (delete)
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Toolbox ?

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- Utility**

SP to P8 - With Vendor ...



Audit Log ?

General

Name:

Description:

Settings

Audit log file name format:

Use default

Specify file identifier: [i](#)

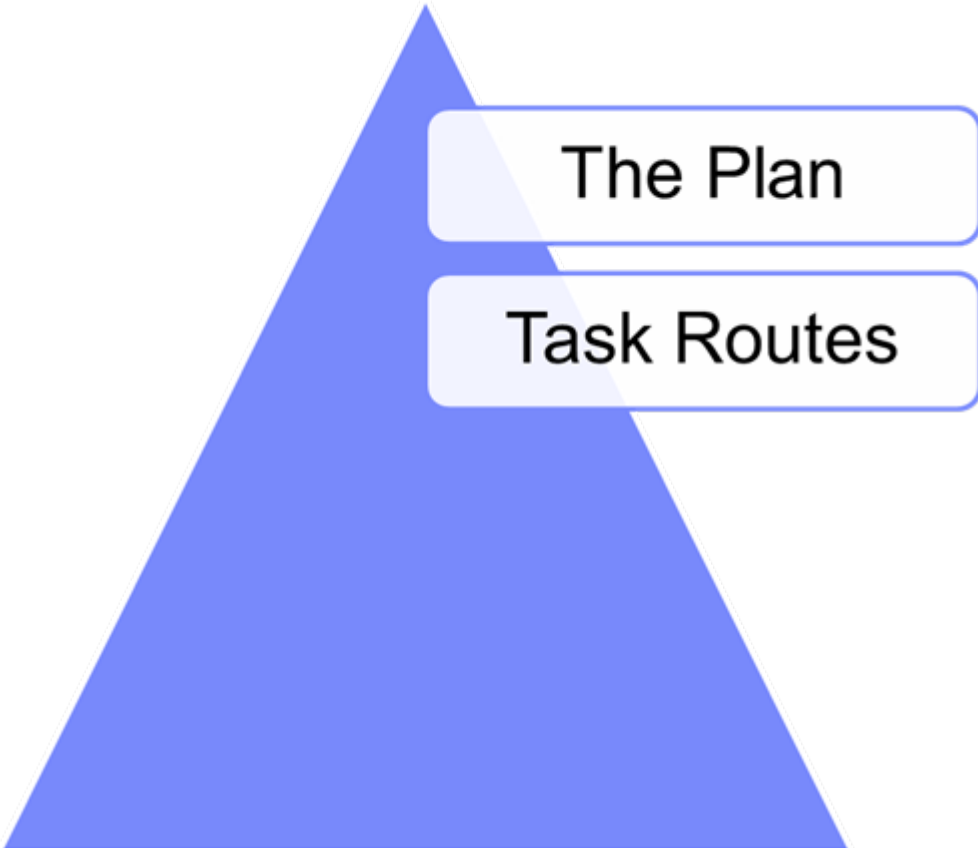
Field Delimiter: [i](#)

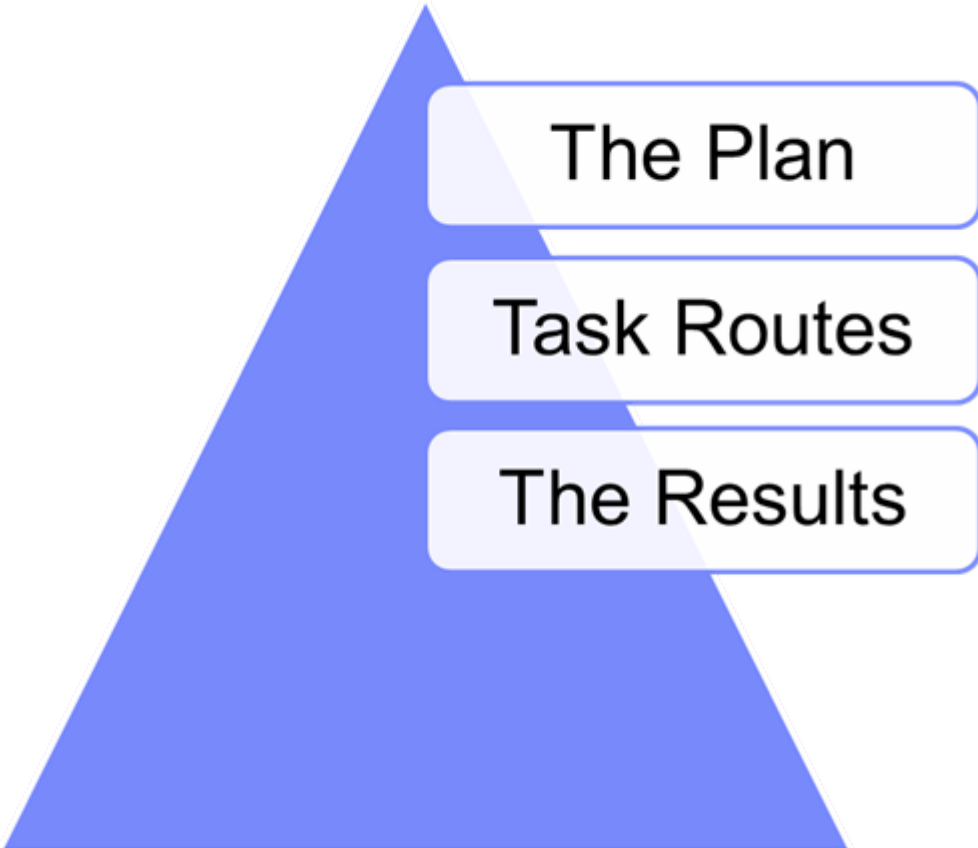
Value delimiter: [i](#)

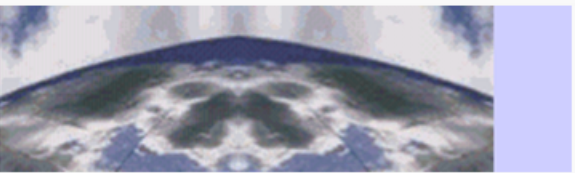
Quote character: [i](#)

Audit log fields: [Show/hide IDs](#)

- File
- HTTP URL
- P8 Create Document
 - Connection Name
 - Is Duplicate
 - Object Class
 - Object ID
 - Object Store







Contract Processing > Service Contracts

I Like It Tags & Notes

Home

Search this site...

- Libraries
- Site Pages
- Shared Documents
- Service Contracts**
- Purchase Contracts
- Lists
- Calendar
- Tasks
- Discussions
- Team Discussion
- P8 Archive
- P8 Browse
- P8 Search
- P8 Personal Inbox
- P8 Public Queues
- P8 User Admin

Type	Name	Contract Amount	Vendor Name	State/Province	Status
	ABC-010002	\$55,000.00	ABC Services	Oregon	Final
	IBM-030002	\$67,000.00	IBM	New York	Published
	IBM-030003	\$87,000.00	IBM	New York	Published
	IBM-090001	\$34,000.00	IBM	New York	Published
	FXM-020002.doc	\$74,000.00	FXM Corp	Nebraska	Final
	FXM-030001.doc	\$83,000.00	FXM Corp	Nebraska	Final
	LAL-040001.doc	\$89,000.00	Larson and Larson	Kansas	Final

+ Add document

Approved Services Contracts

New Document | New Folder

Logged in as: p8admin

View: All Documents

Type	Name	Content Size	Date Last Modified	Last Modifier
	ABC Services	0 KB	8/20/2013 4:27 PM	p8admin
	ACE Corp	0 KB	8/20/2013 4:28 PM	p8admin
	FXM Corp	0 KB	8/20/2013 4:28 PM	p8admin
	Larson and Larson	0 KB	8/20/2013 4:28 PM	p8admin

Site Actions

Home

Libraries

- Site Pages
- Shared Documents
- Service Contracts**
- Purchase Contracts

Lists

- Calendar
- Tasks

Discussions

- Team Discussion

P8 Archive

- P8 Browse
- P8 Search
- P8 Personal Inbox
- P8 Public Queues
- P8 User Admin

Service Contracts - ABC-010002.doc

View

Edit Item Delete Item Manage	Version History Manage Permissions Delete Item Manage	Alert Me Manage Copies Check Out Actions
------------------------------------	--	---

Name	ABC-010002
Title	Focus Corporation
Contract Amount	\$55,000.00
Migrated	Yes
Migrated Information	RT: P8 RN: ICCEXOS RD: {1C5D8F5F-6D29-4425-9C20-DA4DD6411BE1} ID: {74CEE6E2-6FC3-45C0-953A-DE3BB4D105A8} VD: {03FCAA95-ABC5-42C4-BD52-95AA44E52730} VC: 1 LV: 1.0 MD: 2013-08-20T20:28:00Z
State/Province	Oregon
Status	Final
Vendor Name	ABC Services

Content Type: Document
 Version: 1.0
 Created at 8/14/2012 6:20 PM by p8admin
 Last modified at 8/14/2012 6:20 PM by p8admin

Close

I Like It Tags & Notes

Status

- Final
- Published
- Published
- Published
- Final
- Final
- Final

View: All Documents

Last Modifier

- p8admin
- p8admin
- p8admin
- p8admin

Service Contracts - FXM-020002.doc.aspx

View

Edit Item	Version History	Check Out	Alert Me
Delete Item	Manage Permissions	Manage Copies	
Manage		Actions	

Name	FXM-020002.doc
URL	http://ecmdemo1:81/_layouts/ICCSPLinkHandler.aspx?GUID=160ace57-da6d-47ae-98d7-6ef47da29557
Migrated	Yes
Migrated Information	RT: P8 RN: ICCEXOS RD: {1C5D8F5F-6D29-4425-9C20-DA4DD6411BE1} ID: {52C2B1DA-9528-440D-8817-01B6310E2CA7} VD: {EF4800D5-4480-4E87-B447-C7E0FA0F1DE8} VC: 1 LV: 0.0 MD: 2013-08-20T20:28:02Z

Content Type: Migrated Document Link
Version: 1.0
Created at 8/14/2012 6:21 PM by [p8admin](#)
Last modified at 8/14/2012 6:21 PM by [p8admin](#)

[Close](#)

Site Actions

New Document Upload Document New Folder

Libraries

- Site Pages
- Shared Documents
- Service Contracts
- Purchase Contracts
- Lists
- Calendar
- Tasks
- Discussions
- Team Discussion
- P8 Archive
- P8 Browse
- P8 Search
- P8 Personal Inbox
- P8 Public Queues
- P8 User Admin
- Recycle Bin
- All Site Content

Tags and Notes

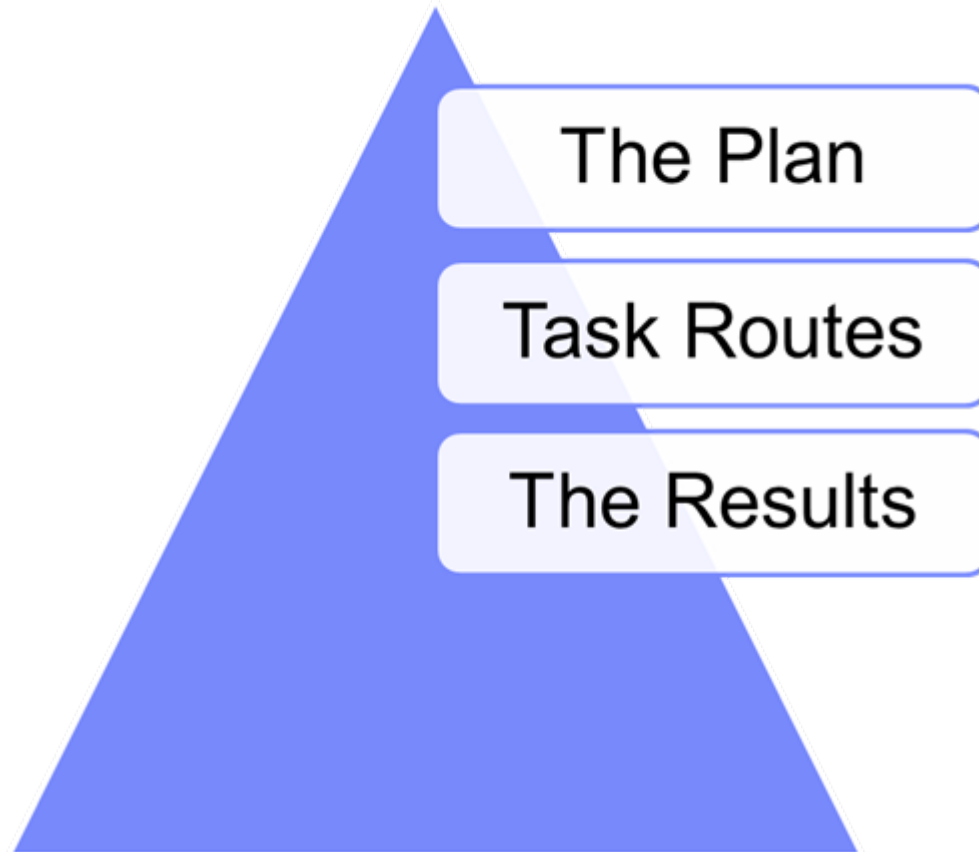
I Like It Tags & Notes

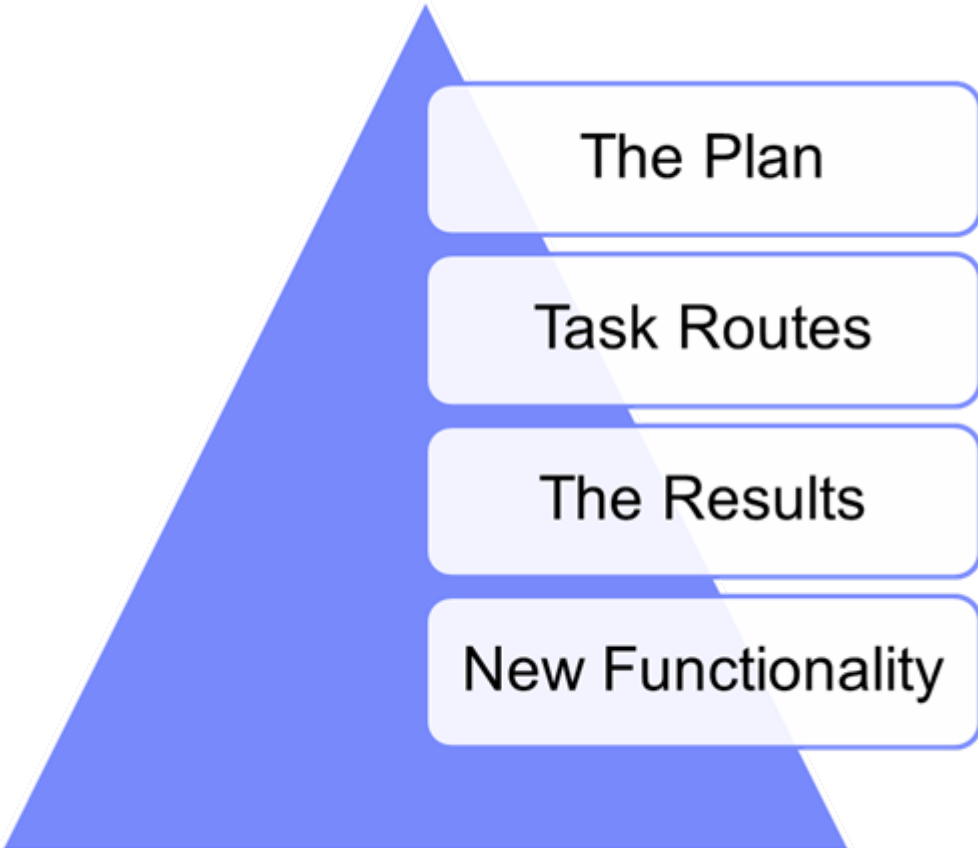
ice	Status
	Final
	Published
	Published
	Published
	Final
	Final
	Final

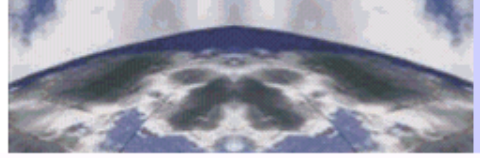
View: **All Documents**

Last Modifier

- p8admin
- p8admin
- p8admin
- p8admin
- p8admin
- p8admin
- p8admin







Contract Processing > Team Discussion > What is the most effective way to accelerate contract handling > Flat

Use the Team Discussion list to hold newsgroup-style discussions on topics relevant to your team.

I Like It Tags & Notes

- Libraries
 - Site Pages
 - Shared Documents
 - Service Contracts
 - Purchase Contracts
- Lists
 - Calendar
 - Tasks
- Discussions
 - Team Discussion
- P8 Archive
 - P8 Browse
 - P8 Search
 - P8 Personal Inbox
 - P8 Public Queues
 - P8 User Admin
- Recycle Bin
- All Site Content

Posted By	Post
<p>Started: 12/2/2012 12:36 PM</p>  <p>p8admin</p>	<p>What is the most effective way to accelerate contract handling? Can we automate some of the steps?</p> <p>View Properties Reply</p>
<p>Posted: 12/2/2012 12:47 PM</p>  <p>Mark Hart</p>	<p>If we had automated emails when we have new or late contracts - maybe it could automatically email us when critical contracts of our employees were in danger of being late?</p> <p>Show Quoted Messages</p> <p>View Properties Reply</p>



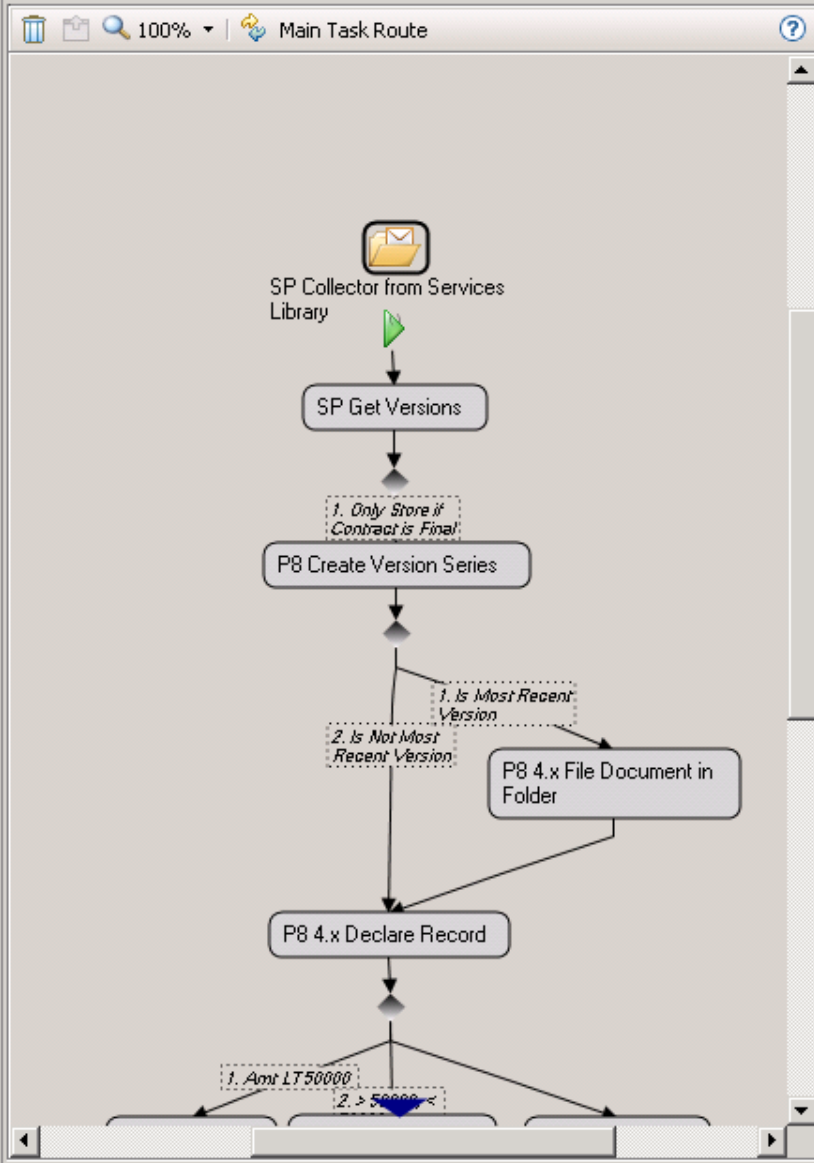
Explorer

- Bulk load iccexos files (Replic...
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- SP to P8 - With Versions

Toolbox

- Link
- Audit Log
- Email**
- File System Repository**
- File System Source**
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- Text Extraction**
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SP to P8 - With Vendor ...



SharePoint Collector

Collection sources

Connection URL	Level	Depth
http://ecmdemo1...	Site	1



- Bulk load iccexos files (Replic...
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- Bulk load, collect PST
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Edit Collection Source

Site connection ⓘ

SP Contract Processing

Refresh site content

Locations Filters Columns Read-Only Exceptions Advanced

Content types ⓘ

- Contract
- Discussion
- Document
- Dublin Core Columns
- East Asia Contact
- Event

 Content type inheritance ⓘ

Folder ⓘ

Start collection in:

- Root folder
- Specific folder path:

Created or modified by users ⓘ

 Suggest existing users

Add user: ⓘ

Add

Selected users: ⓘ

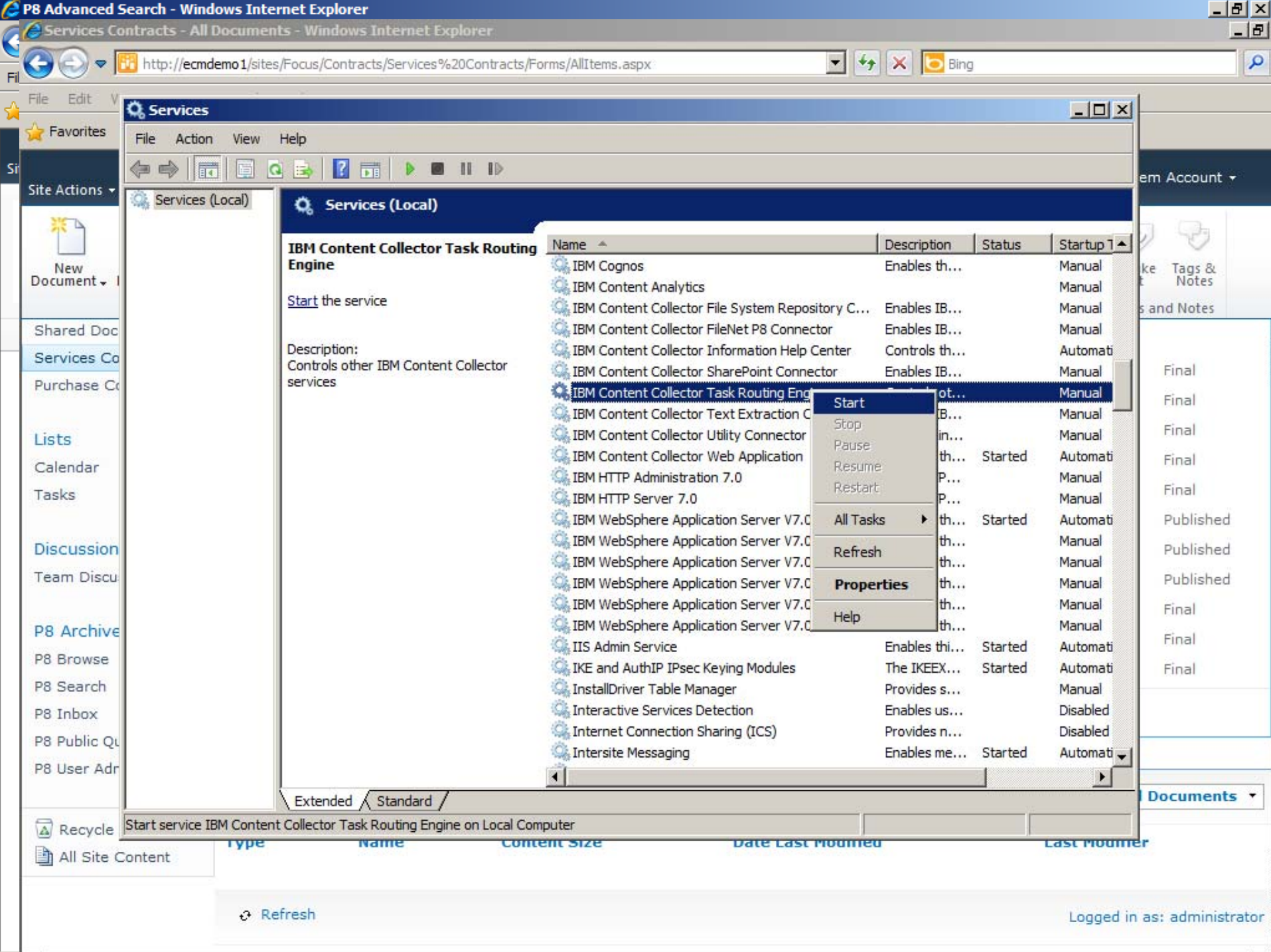
Remove

OK

Cancel

ion Sources

vel	Depth
e	1



- ★ Favorites
- Site Actions
- New Document
- Shared Documents
- Services Contracts
- Purchase Contracts
- Lists
- Calendar
- Tasks
- Discussion
- Team Discussions
- P8 Archive
- P8 Browse
- P8 Search
- P8 Inbox
- P8 Public Queries
- P8 User Address
- Recycle Bin
- All Site Content

Services (Local)

IBM Content Collector Task Routing Engine

[Start](#) the service

Description:
Controls other IBM Content Collector services

Name	Description	Status	Startup Type
IBM Cognos	Enables th...		Manual
IBM Content Analytics			Manual
IBM Content Collector File System Repository C...	Enables IB...		Manual
IBM Content Collector FileNet P8 Connector	Enables IB...		Manual
IBM Content Collector Information Help Center	Controls th...		Automati
IBM Content Collector SharePoint Connector	Enables IB...		Manual
IBM Content Collector Task Routing Eng...	ot...		Manual
IBM Content Collector Text Extraction C	IB...		Manual
IBM Content Collector Utility Connector	in...		Manual
IBM Content Collector Web Application	th...	Started	Automati
IBM HTTP Administration 7.0	P...		Manual
IBM HTTP Server 7.0	P...		Manual
IBM WebSphere Application Server V7.0	th...	Started	Automati
IBM WebSphere Application Server V7.0	th...		Manual
IBM WebSphere Application Server V7.0	th...		Manual
IBM WebSphere Application Server V7.0	th...		Manual
IBM WebSphere Application Server V7.0	th...		Manual
IBM WebSphere Application Server V7.0	th...		Manual
IIS Admin Service	Enables thi...	Started	Automati
IKE and AuthIP IPsec Keying Modules	The IKEEX...	Started	Automati
InstallDriver Table Manager	Provides s...		Manual
Interactive Services Detection	Enables us...		Disabled
Internet Connection Sharing (ICS)	Provides n...		Disabled
Intersite Messaging	Enables me...	Started	Automati

Start service IBM Content Collector Task Routing Engine on Local Computer

- Start
- Stop
- Pause
- Resume
- Restart
- All Tasks
- Refresh
- Properties
- Help

Type	Name	Content Size	Date Last Modified	Last Modified
------	------	--------------	--------------------	---------------

Refresh

Logged in as: administrator

Tools

Actions

[Drag files here to add](#)

- ⊕ Favorites
- ⊕ CMDEV
- ⊕ CMDOS
- ⊕ CMTOS
- ⊕ Content Collected
- ⊖ ECM
 - ⊕ All Searches
 - ⊕ Checkout List
 - ⊕ FIMO Workflows
 - ⊕ Invoice
 - ⊕ Marketing Plans
 - ⊕ Publish Templates
 - ⊕ Published
 - ⊕ Templates
 - ⊕ Workflows
- ⊕ FPOS
- ⊖ ICCEXOS
 - ⊕ All Searches
 - ⊕ Checkout List
 - ⊖ Contract Processing
 - ⊖ **Team Discussion**
 - ⊕ Contracts
 - ⊕ EDM
 - ⊕ Email
 - ⊕ EmailBusiness General
 - ⊕ EmailBusiness Legal Agreement
 - ⊕ EmailPersonal Confidential

	Name ▲	Size	Modified By	Modified On	Major Version
	What is the most effective way to accelerate contract handling	202 KB	p8admin	Dec 3, 2012 1:39 PM	1



Started: 2012-12-04T00:26Z by p8admin (ECM\p8admin)

What is the most effective way to accelerate contract handling?

Can we automate some of the steps?

Posted: 2012-12-04T00:28Z by Mark Hart (ECM\mark)

[Version History](#)

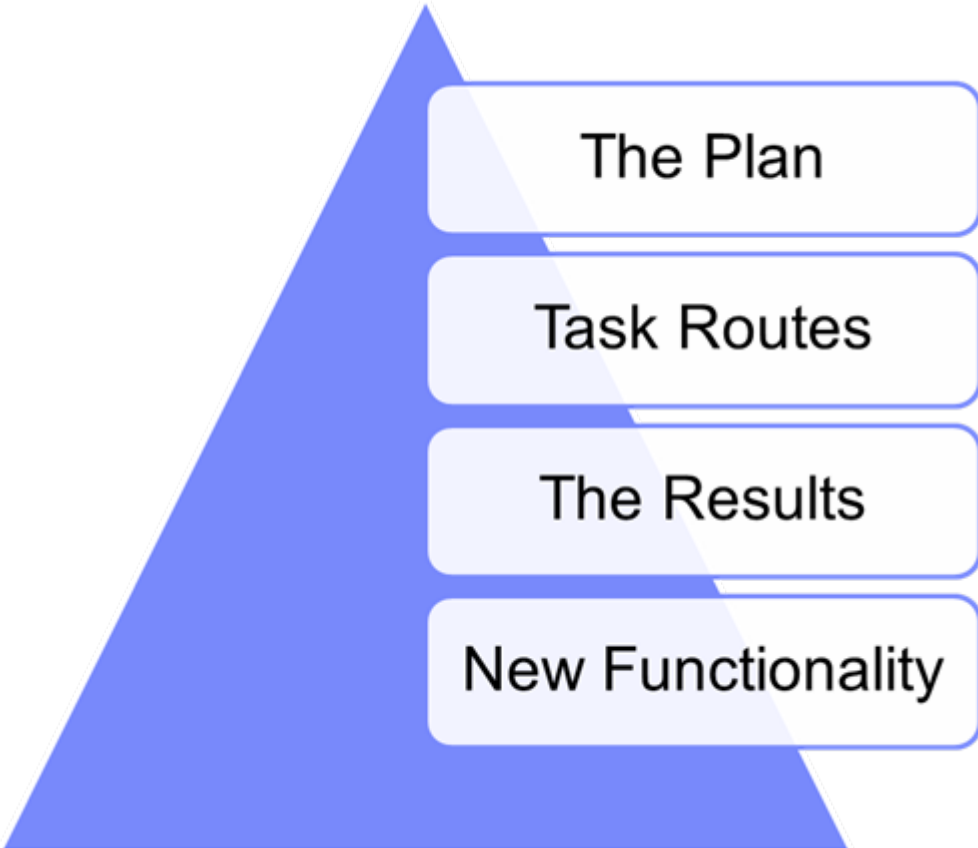
If we had automated emails when we have new or late contracts - maybe it could automatically email us when critical contracts of our employees were in danger of being late?

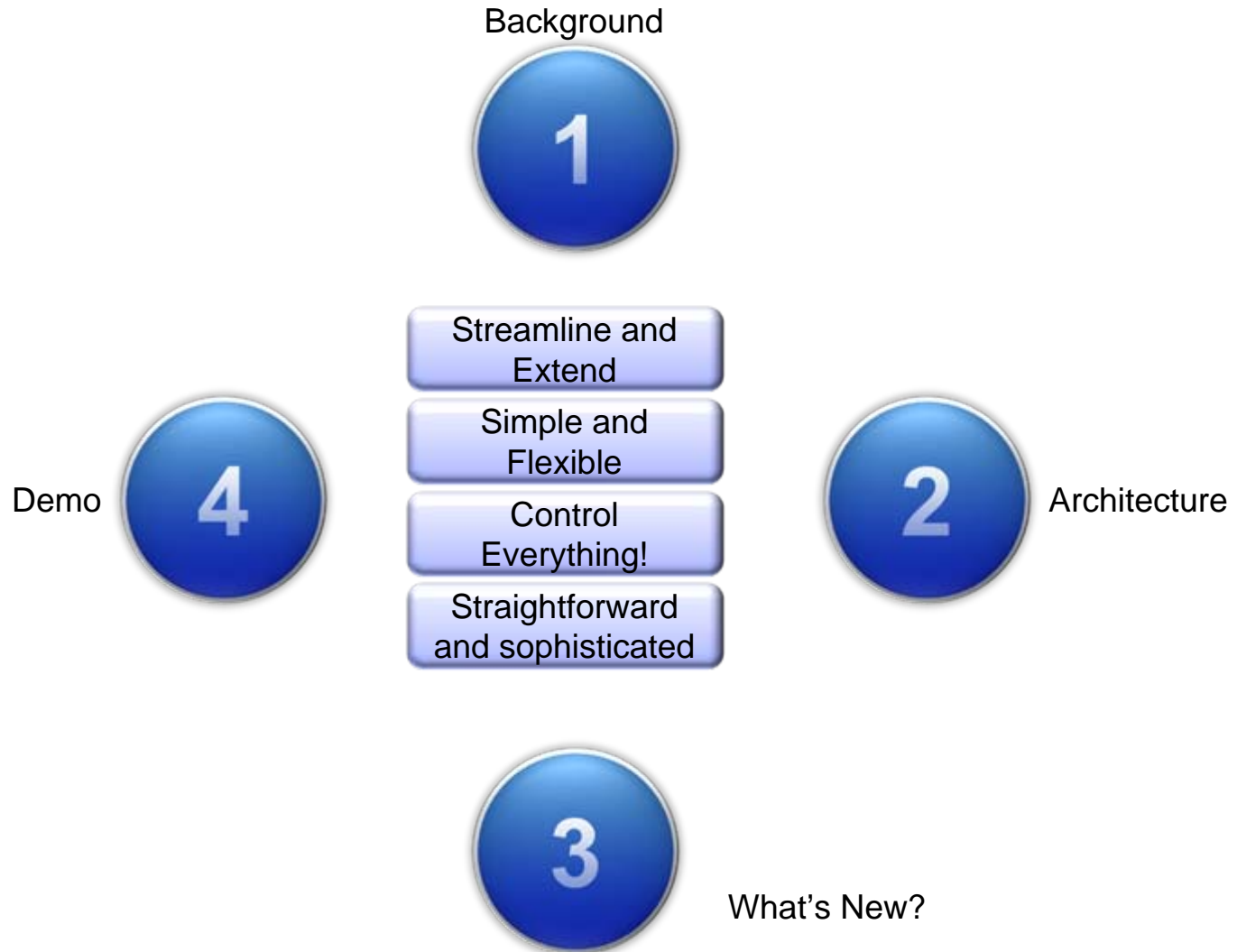
From: p8admin

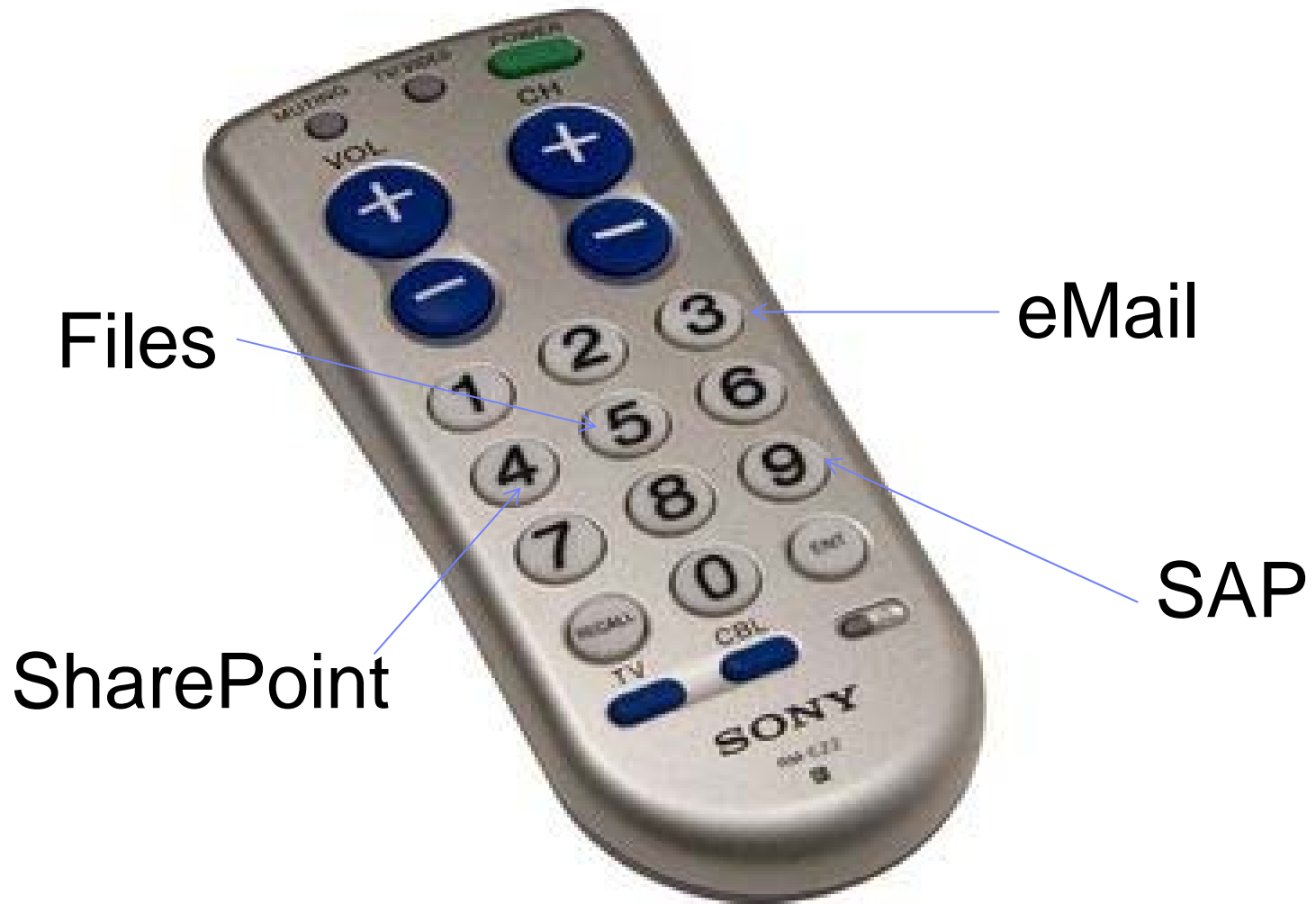
Posted: 12/3/2012 1:26 PM

Subject: What is the most effective way to accelerate contract handling?

Can we automate some of the steps?







- "Understanding the footprint of IBM Content Collector for Microsoft SharePoint"
- <http://www.ibm.com/developerworks/data/library/techarticle/dm-1103contentcollector/index.html>

Questions?

Susan Noonan

snoonan@us.ibm.com



Backup Demo

Susan Noonan
snoonan@us.ibm.com



Repository Configuration

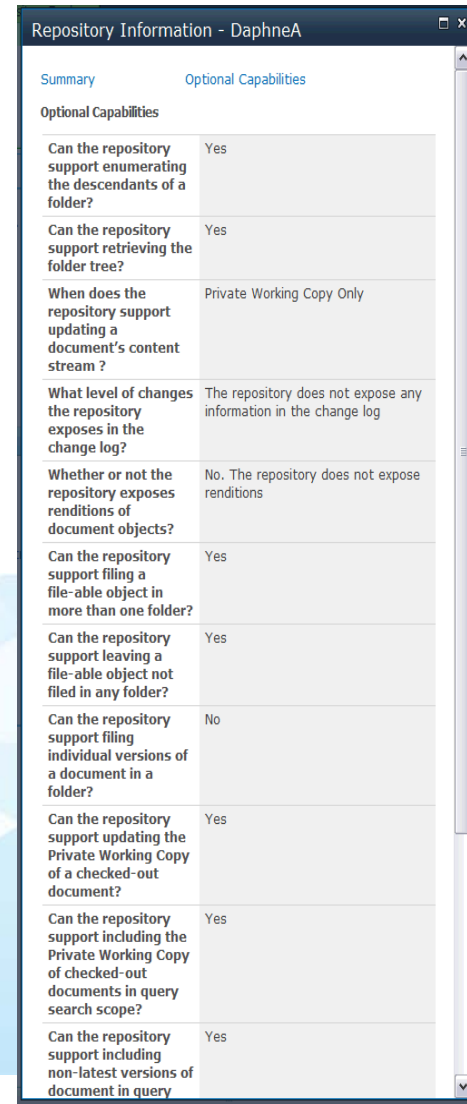
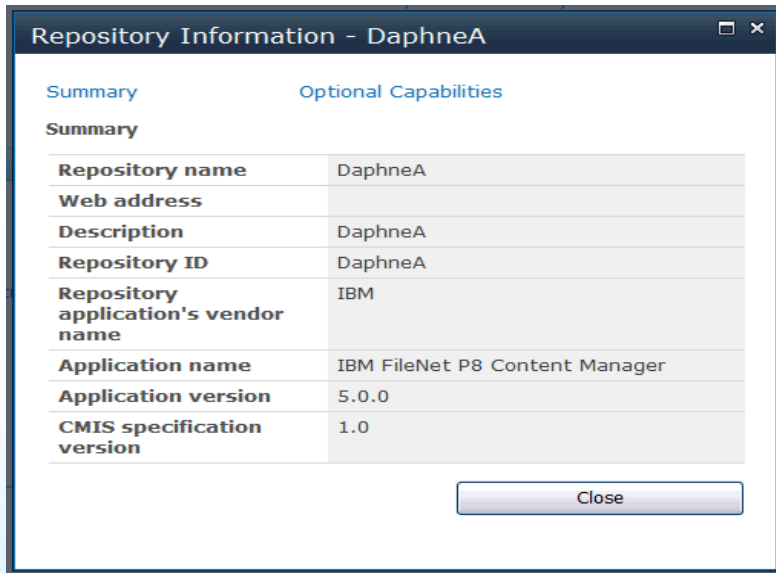
The screenshot displays the SharePoint interface with the 'Repository Tools' ribbon selected. The ribbon includes sections for 'Object' and 'Repository'. The 'Repository' section contains the following tools: Approve, Reject, Workflows, Edit Mobile Page, Make Homepage, and Title Bar Properties. The 'Workflows' tool is currently active, showing a 'Full Page' view with an 'Add a Web Part' button. Below this, a 'CMIS Consumer' web part is visible, with a message: 'Please open the tool pane to set repository connections'. On the right side, the 'CMIS Consumer' tool pane is open, showing configuration options:

- Appearance
- Layout
- Advanced
- Connection Options
 - Specify WSDL Address:
 - WS-Security Required
 - Basic
 - Digest
 -
 - Select Repository:

The bottom status bar shows 'Done', 'CMIS Plugin', 'Fiddler: Disabled', and system tray icons including 'S3Fox'.

Repository Information

- Administrators can view basic repository information
- They can also view the optional capabilities exposed by a given CMIS repository



Folder Browsing

Choose Folder

Select a folder. The web part will display content from the folder you select.

- Root Folder
 - OpenSocialAlbums
 - Greg
 - Martin Zhang
 - john.doe
 - test
 - New Album
 - windows samples
 - YerbabuenaTestFolder
 - Sales
 - Sales
 - Test
 - PresentationsWeb
 - PresentationArchive
 - OpenTextClient
 - TestAdapters
 - BBUnitTest2881
 - CMISTCK 1279656370370 - testQueryPaging
 - paging
 - xiy
 - TestWS
 - fit_aa2702c5-9986-4ae1-b147-d699cfa4cfb1
 - My_Folder-0-1
 - My_Folder-1-1
 - My_Folder-1-0
 - My_Folder-0-0
 - My_Folder-1-1
 - My_Folder-1-0
 - Wan
 - NewFolderUnderRoot
 - folder 2
 - folder 1
 - subfolder 1
 - Zeta Hospital
 - Reports
 - Staff
 - AnotherMelahnFolder

Repository Tools

Site Actions | Browse | Page | Object | Repository

Navigate Up | Navigate To | Repository Information | Customize View

CMIS Consumer

Location: <DaphneA>/JaysTestFolder

Type	Name	Modified	Modified By	Created By	Created	Is Reserved	Version Status
Folder	SPFolder	9/8/2010 7:12:00 AM	CEMPAdmin	CEMPAdmin	9/8/2010 7:12:00 AM		
Folder	OW1	8/4/2010 11:01:48 AM	CEMPAdmin	CEMPAdmin	8/4/2010 11:01:48 AM		
Folder	versioningTest	7/28/2010 8:18:16 AM	CEMPAdmin	CEMPAdmin	7/28/2010 8:18:16 AM		
File	textWithuniquewords	9/8/2010 7:59:00 AM	CEMPAdmin	CEMPAdmin	9/8/2010 7:59:00 AM	False	1
File	testTextSPdoc	9/8/2010 7:17:16 AM	CEMPAdmin	CEMPAdmin	9/8/2010 7:17:16 AM	False	1
File	pathstest	9/7/2010 8:05:55 AM	CEMPAdmin	CEMPAdmin	9/7/2010 8:05:55 AM	False	1
File	the Way To go.pdf	9/1/2010 4:04:04 AM	CEMPAdmin	CEMPAdmin	9/1/2010 4:03:55 AM	True	3
File	ASCII_table.pdf	9/1/2010 4:02:44 AM	CEMPAdmin	CEMPAdmin	9/1/2010 4:02:44 AM	True	3
File	PythonQuickReferenceQR2.6.html	9/1/2010 4:01:10 AM	CEMPAdmin	CEMPAdmin	9/1/2010 4:01:07 AM	True	3
File	getty1.jpg	9/1/2010 4:00:36 AM	CEMPAdmin	CEMPAdmin	3/29/2010 9:34:54 AM	True	3
File	daemon-tux-duke-mozilla	7/28/2010 5:12:11 AM	CEMPAdmin	CEMPAdmin	7/28/2010 5:10:49 AM	True	1
File	photo.jpg	5/6/2010 10:50:22 AM	CEMPAdmin	CEMPAdmin	3/8/2010 2:35:31 PM	True	1
File	TedAmado.jpg	3/24/2010 3:58:57 PM	CEMPAdmin	CEMPAdmin	3/24/2010 3:58:45 PM	False	1
File	photo.jpg	3/8/2010 2:38:59 PM	CEMPAdmin	CEMPAdmin	3/8/2010 2:38:57 PM	True	3

Document Versioning and Properties

- Users can create new documents directly in P8 through SharePoint
- They have the ability to specify most of the important properties and settings they could through native P8 applications
- Users can view and edit document properties directly through SharePoint

Document Properties - testTextSPdoc

Edit

Save Cancel Delete Document

Commit Actions

* Indicates a required field

Replication Group:

External Replica Identities:

Owner:

Permissions:

Security Policy:

Security Parent:

Security Folder:

Storage Policy:

Content Elements:

Compound Document State:

Document Title:

Component Binding Label:

Entry Template Object Store Name:

Entry Template Launched Workflow Number:

Entry Template Id:

Ignore Redirect:

Name:

Document Type : Document
Version: 1.0
Created at 9/8/2010 7:17:16 AM by CEMPAdmin
Last Modified at 9/8/2010 7:17:16 AM by CEMPAdmin

OK Cancel

Version History - FantasyIsland.jpg

Delete All Versions Delete Minor Versions

No.	Modified	Modified By	Size	Comments	Latest Major Version
2.1	7/28/2010 9:48:24 AM	CEMPAdmin	< 1 KB		
2.0	7/28/2010 9:48:07 AM	CEMPAdmin	< 1 KB		True
1.0	7/28/2010 8:19:29 AM	CEMPAdmin	< 1 KB		



Custom Views and Search

- Library views allow administrators to customize the view
 - Add or remove specific columns
- Users can locate documents stored in P8 object stores through the search bar
 - Enables metadata and full content search

Customize View

OK Cancel

Columns

Select or clear the check box next to each column you want to show or hide in this view of the web part. To specify the order of the columns, select a number in the Position from Left box.

Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Type	0
<input checked="" type="checkbox"/>	Name	1
<input checked="" type="checkbox"/>	Modified	2
<input checked="" type="checkbox"/>	Modified By	3
<input checked="" type="checkbox"/>	Created By	4
<input checked="" type="checkbox"/>	Created	5
<input checked="" type="checkbox"/>	Is Reserved	6
<input checked="" type="checkbox"/>	Version Status	7
<input type="checkbox"/>	Active Markings	8
<input type="checkbox"/>	Annotations	9
<input type="checkbox"/>	Application Name	10
<input type="checkbox"/>	Audited Events	11
<input type="checkbox"/>	Cc	12
<input type="checkbox"/>	Check In Comment	13
<input type="checkbox"/>	Child Documents	14
<input type="checkbox"/>	Child Relationships	15
<input type="checkbox"/>	Class Description	16
<input type="checkbox"/>	Classification Status	17
<input type="checkbox"/>	CMISBinary	18
<input type="checkbox"/>	CMISBoolean	19
<input type="checkbox"/>	CMISBooleanList	20
<input type="checkbox"/>	CMISDateList	21
<input type="checkbox"/>	CMISDateTime	22
<input type="checkbox"/>	CMISFloat	23
<input type="checkbox"/>	CMISFloatList	24
<input type="checkbox"/>	CMISId	25
<input type="checkbox"/>	CMISIdList	26
<input type="checkbox"/>	CMISInt	27
<input type="checkbox"/>	CMISIntList	28
<input type="checkbox"/>	CMISObject	29
<input type="checkbox"/>	CMISObjectList	30
<input type="checkbox"/>	CMISOrderedIntList	31
<input type="checkbox"/>	CMISOrderedStringList	32

CMIS Consumer

Search Result:

foo

<input checked="" type="checkbox"/>	Type	Name	Modified	Modified By	Created By	Created	Is Reserved	Ver
<input checked="" type="checkbox"/>	0	textWithUniquewords	9/8/2010 7:59:00 AM	CEMPAdmin	CEMPAdmin	9/8/2010 7:59:00 AM	False	1



Backup Slides



Browse

- Favorites
- Checkouts
- Recent Documents
- CMDOS
- CMTOS
- ECM

Filter by: None


Name	Modified By	Modified On	Size
ABC-010001.doc	Administrator	11/8/2012	48 KB
ABC-010002.doc	Administrator	11/8/2012	48 KB


Properties Security Version Series Folders Filed In

Name: ABC-010001.doc

Class: ICCSharepointInstance 2

Object Store: ECM

Class Properties: 

System Properties: 

Hide Details Modify



ABC Services

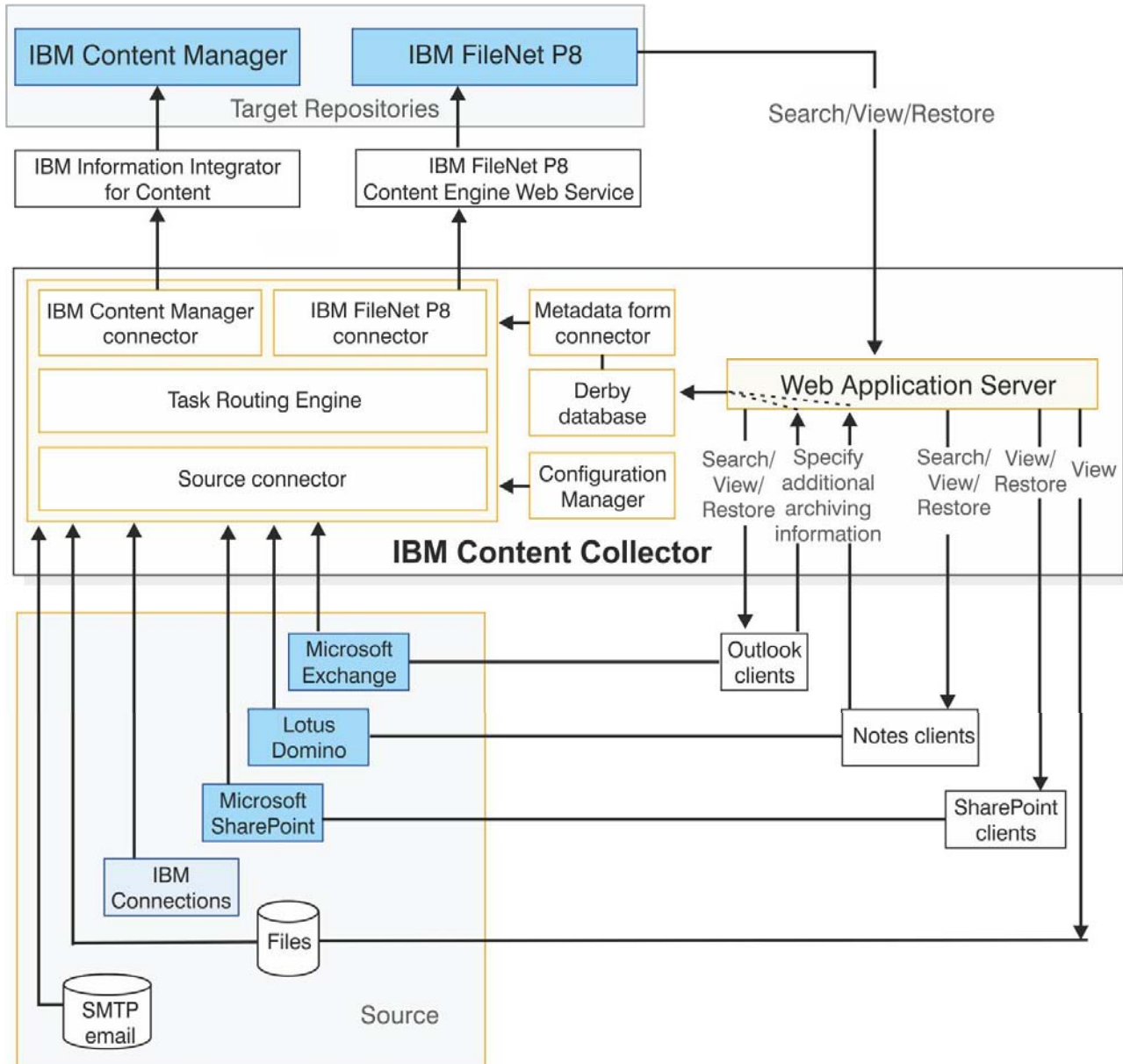
Focus Corporation
Contract for Goods and Services

This agreement is made by and between Focus Corporation and ABC Services hereinafter 'Vendor.'

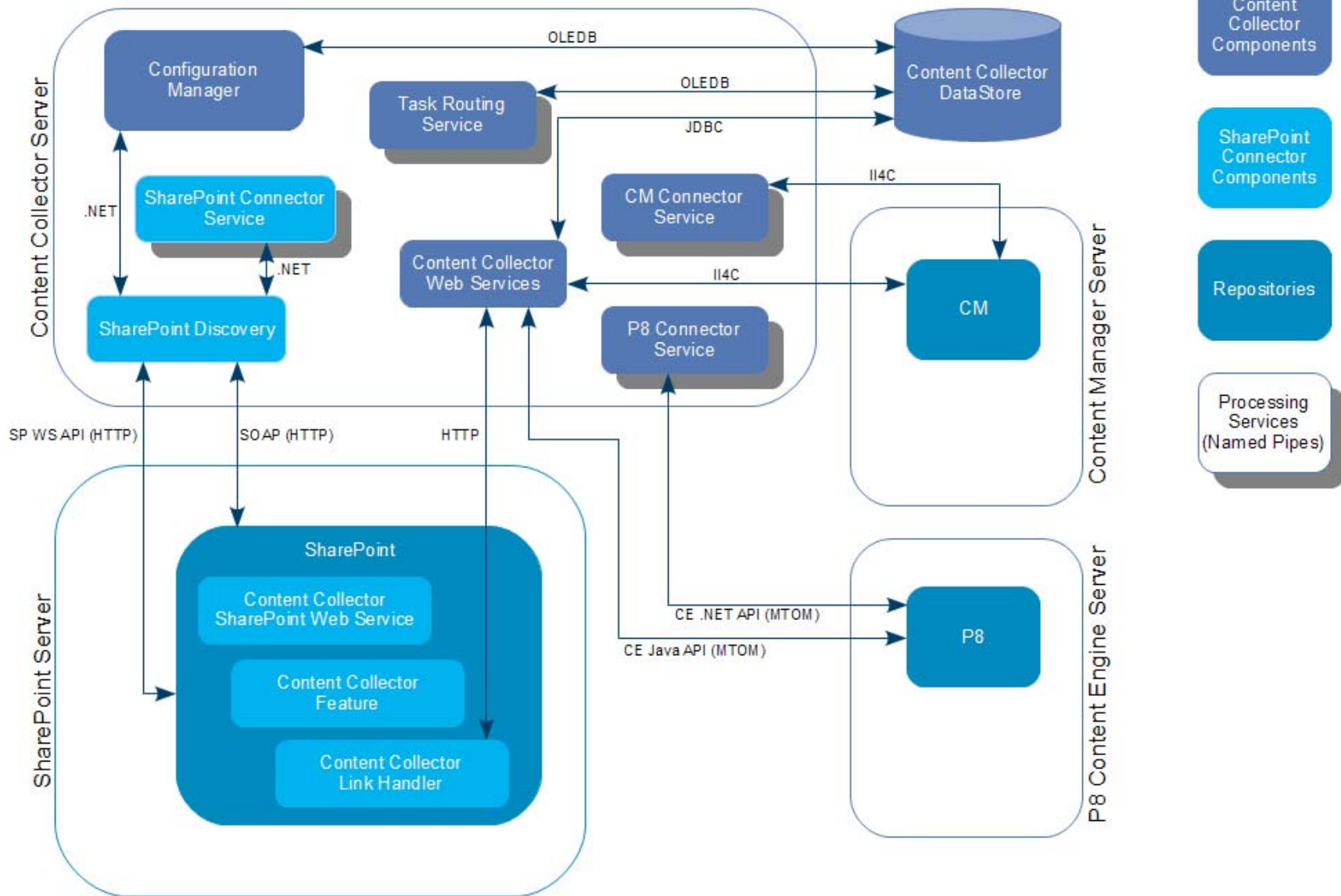
Responsibilities of the Vendor:

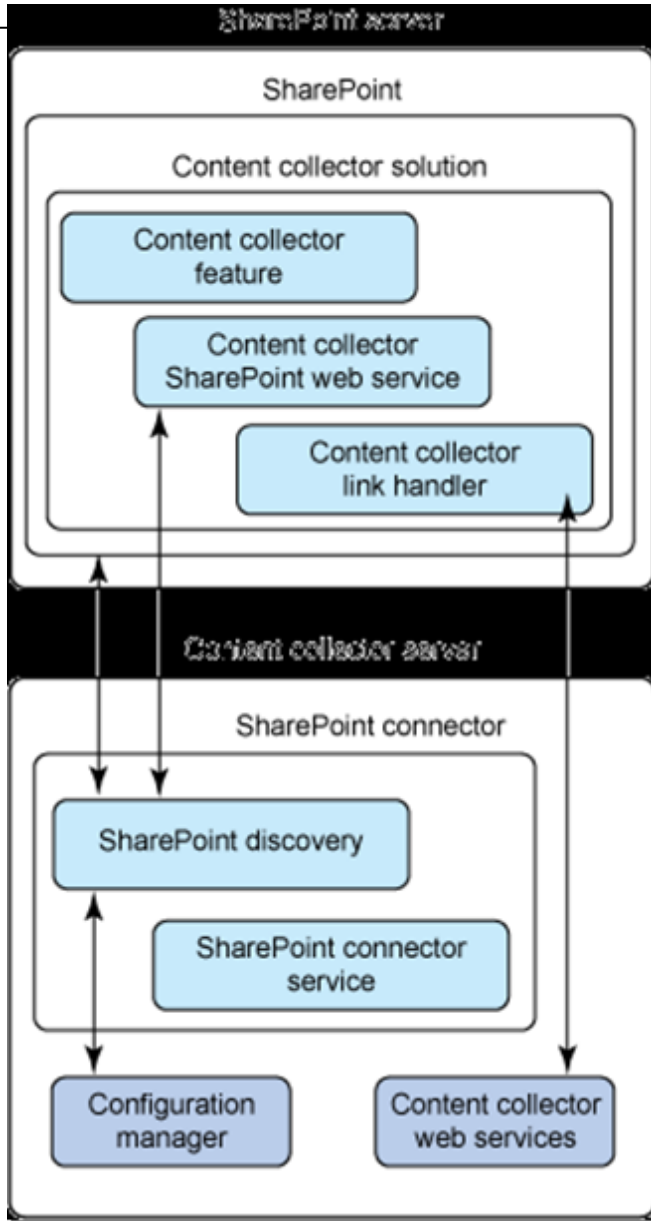
1. The vendor hereby promises to deliver the goods and services described in attachment 1 of this contract to Focus Corporation Company in accordance with the terms and agreements specified in this contract.
2. The vendor guarantees to meet specified delivery dates and performance criteria.

ICC Architecture



IBM Content Collector for SharePoint 2.2







InfoSphere Enterprise Records

p8admin | Wednesday, October 26, 2011

Help | Home | Sign Out

- Browse** | Search | Disposition | Physical | Reports | Configure |

Show Category Tree

Path: **Corporate File Plan** > **10000-IT Operations** > **10000-0100-IOD Projects** > **10000-0100-0030-2011**

- Get Info
- Add Record Category
- Add Record Folder
- Declare Physical Record

Filter

Items found

<input type="checkbox"/>				Entity Name ▲	Id	Entity Type	Reviewer	Current Phase Execution Date
<input type="checkbox"/>				ce_ltpa		Record	p8admin	
<input type="checkbox"/>				Post Mortem M1.docx		Record	p8admin	
<input type="checkbox"/>				Post Mortem M2.docx		Record	p8admin	
<input type="checkbox"/>				Post Mortem M2.docx		Record	p8admin	
<input type="checkbox"/>				Post Mortem M2.docx		Record	p8admin	
<input type="checkbox"/>				SetupLiquentServices.iss		Record	p8admin	

Multi-Select Actions ▼

- Browse | Search | Disposition | Physical | Reports | Configure