

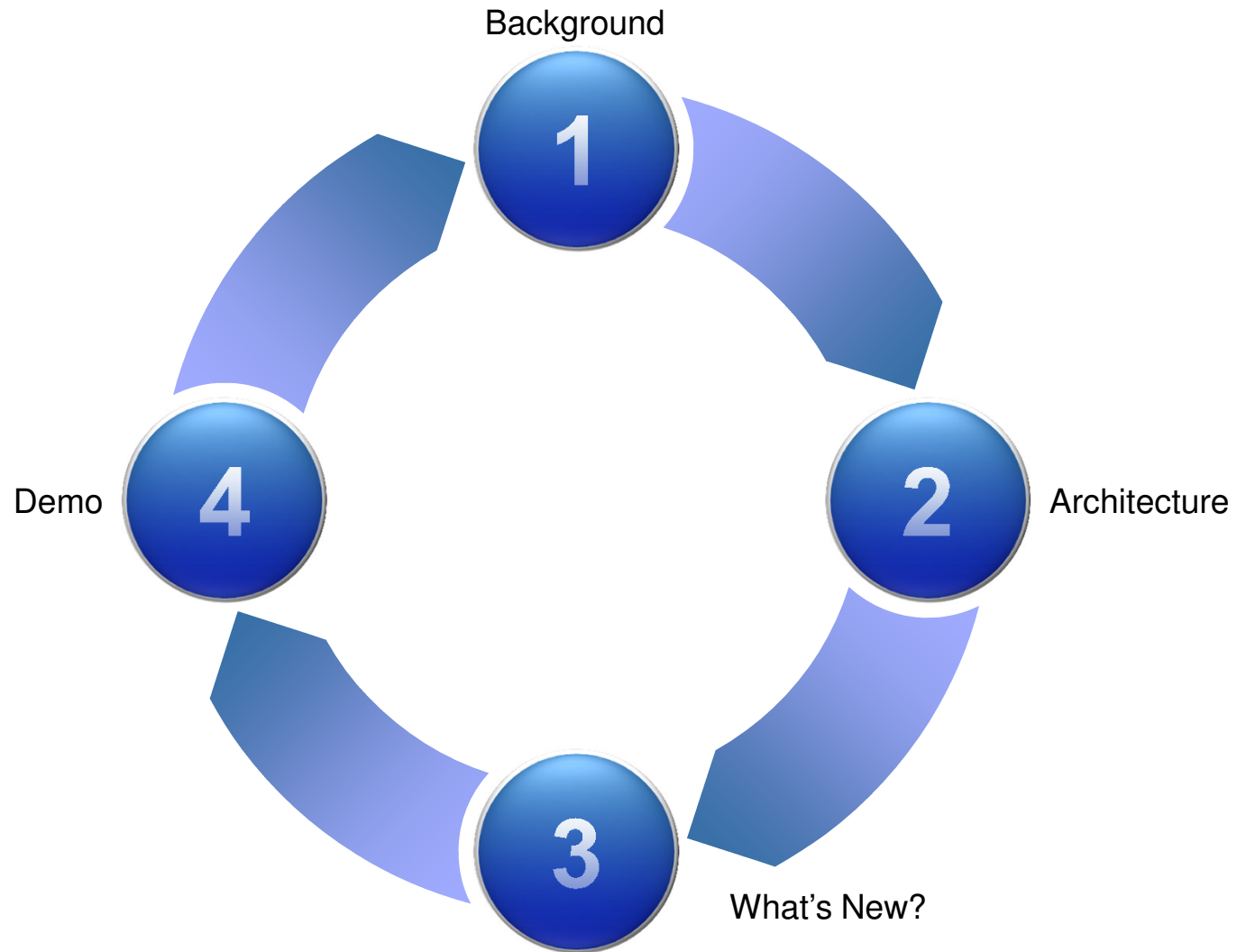
IBM Enterprise Content Management Platform

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





ICC for SharePoint



ICC for SharePoint



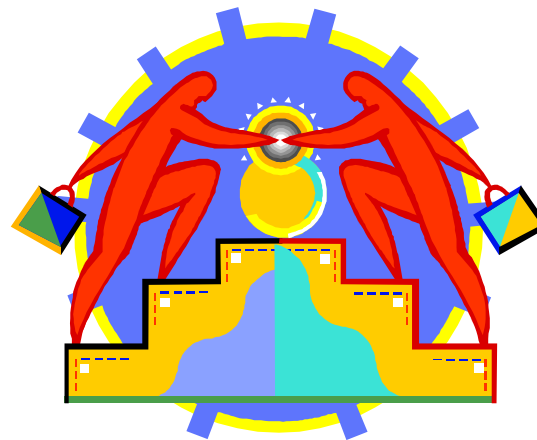
Background



Collaboration and ECM



- 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

ICC for SharePoint



Background



Architecture

IBM SharePoint Integration



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?

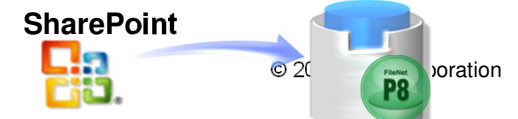
- ❑ SharePoint initial content authoring environment, & content ultimately swept into & accessed from P8
- ❑ Provides SharePoint basic content services and collaboration, but customers need a secure and centrally managed repository
- ❑ Provide a seamless and automated way for content to transition into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

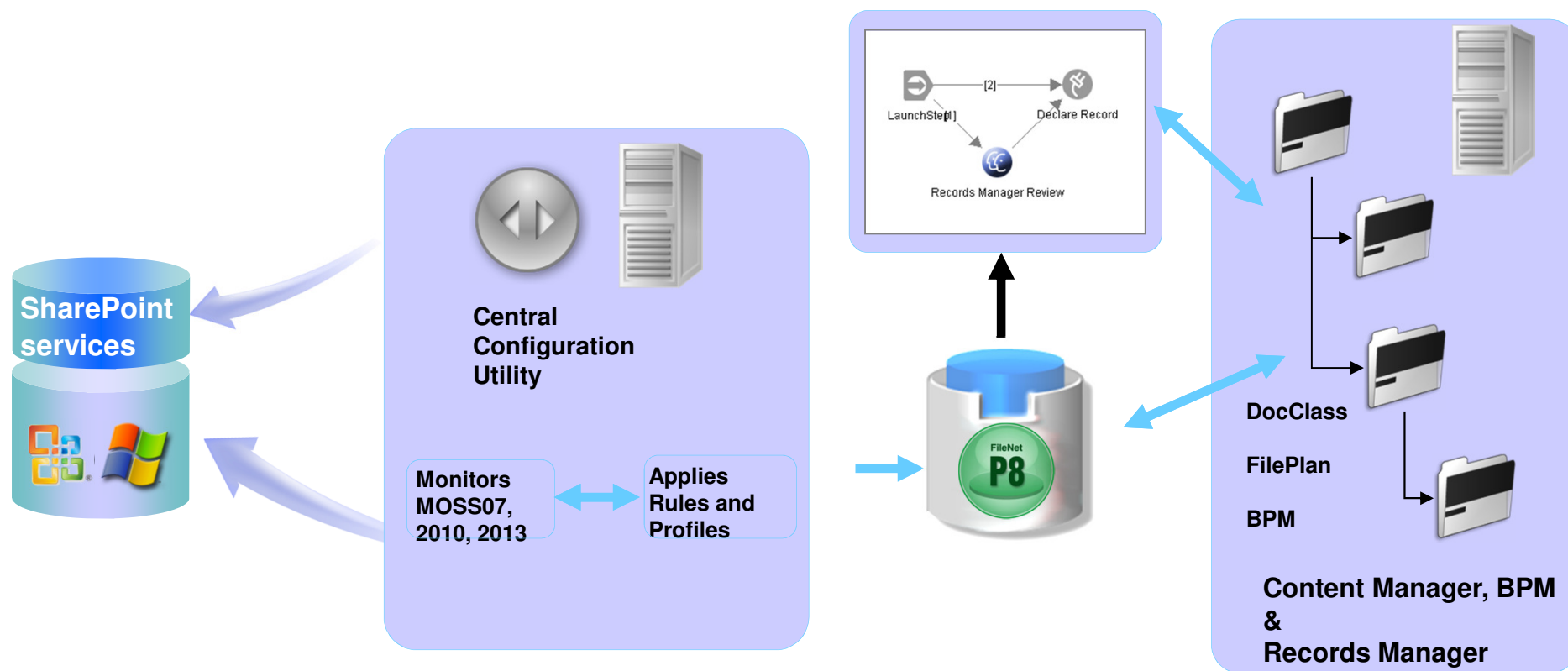
Supports:

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



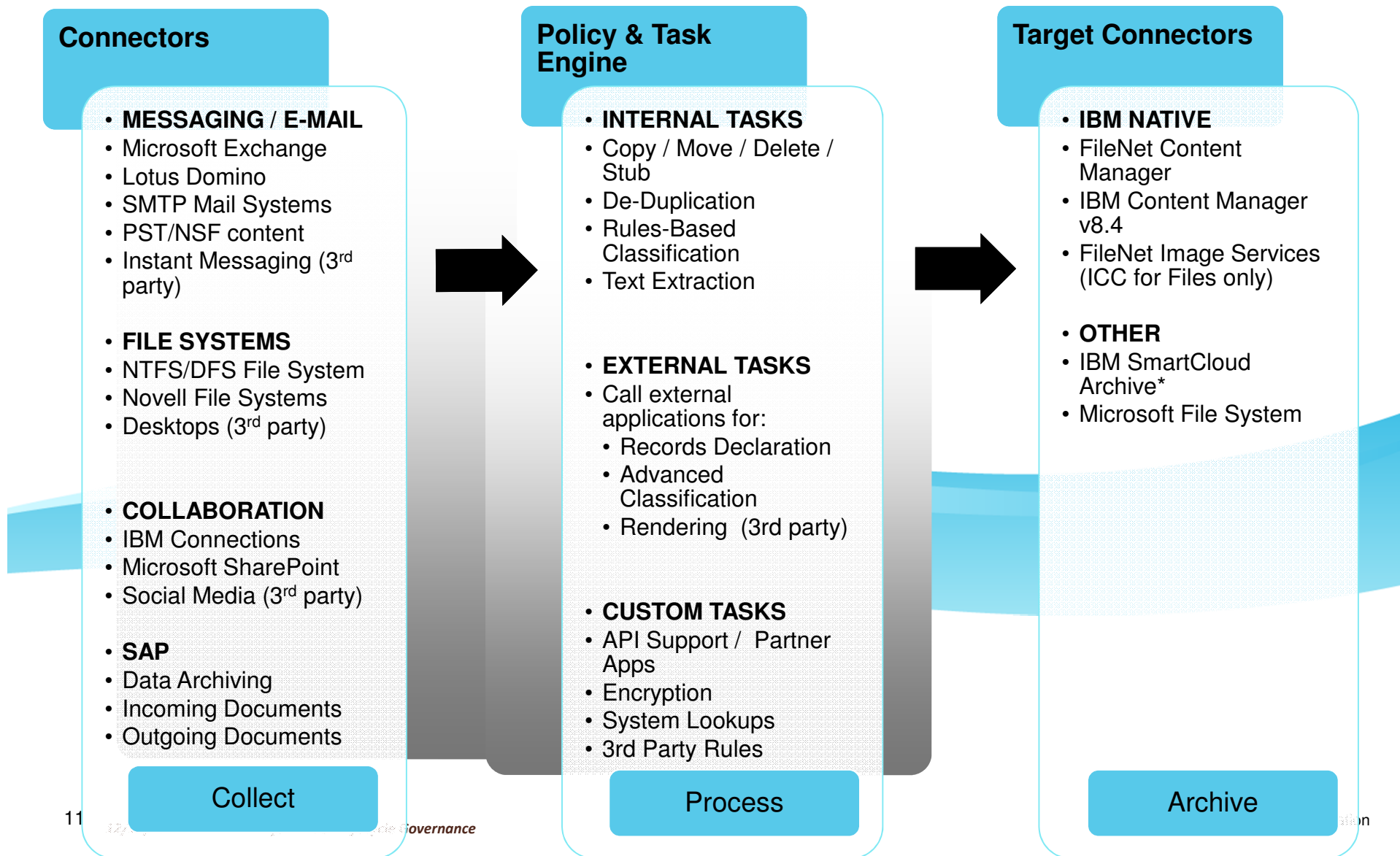
SharePoint Integration

Delivering ECM to all Information Workers

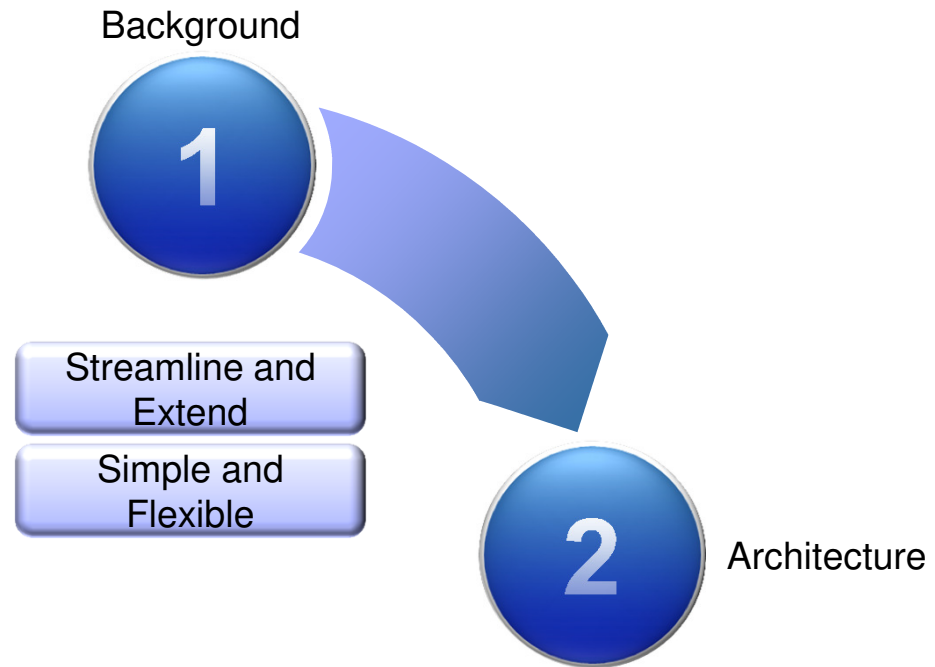


Collect, Process and Archive

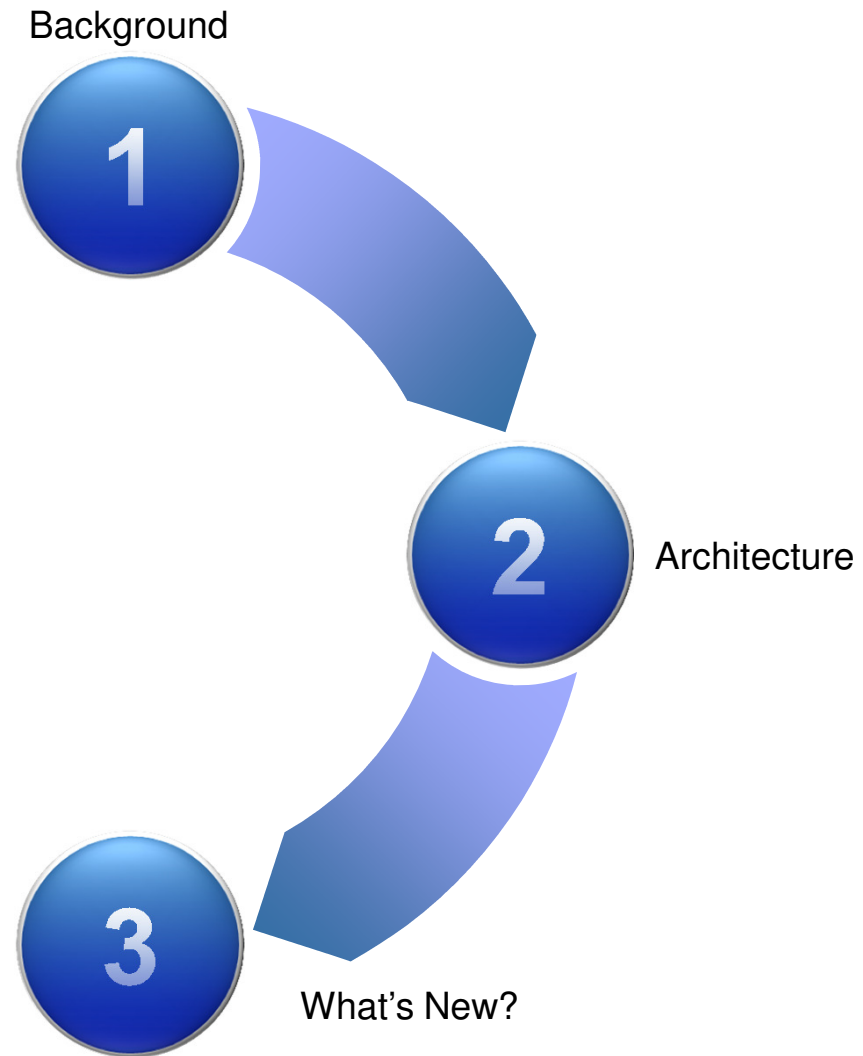
Across multiple sources and targets



ICC for SharePoint



ICC for SharePoint



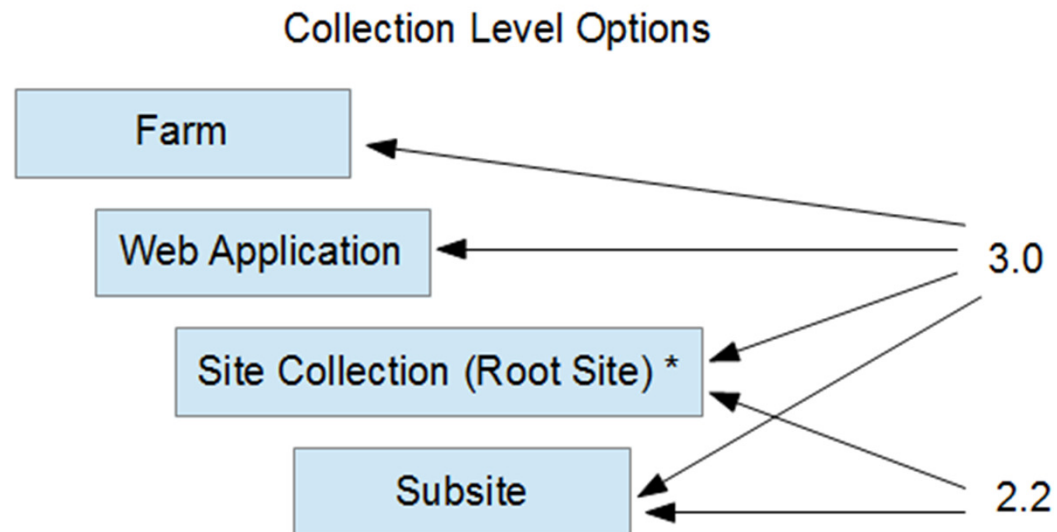
What's new for SharePoint in ICC latest releases?

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

Broad collection capabilities



- Collection Level



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

List Support



- 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

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

Close

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	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

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.

As Archived by ICC; Rendered in browser


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](#)

Filtering - Users



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: ⓘ

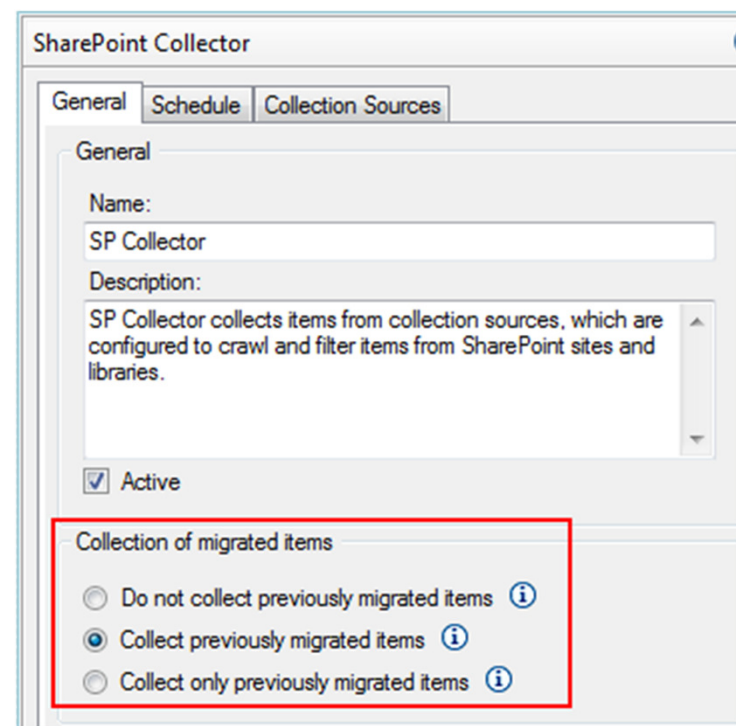
Remove

Re-collection Enhancements

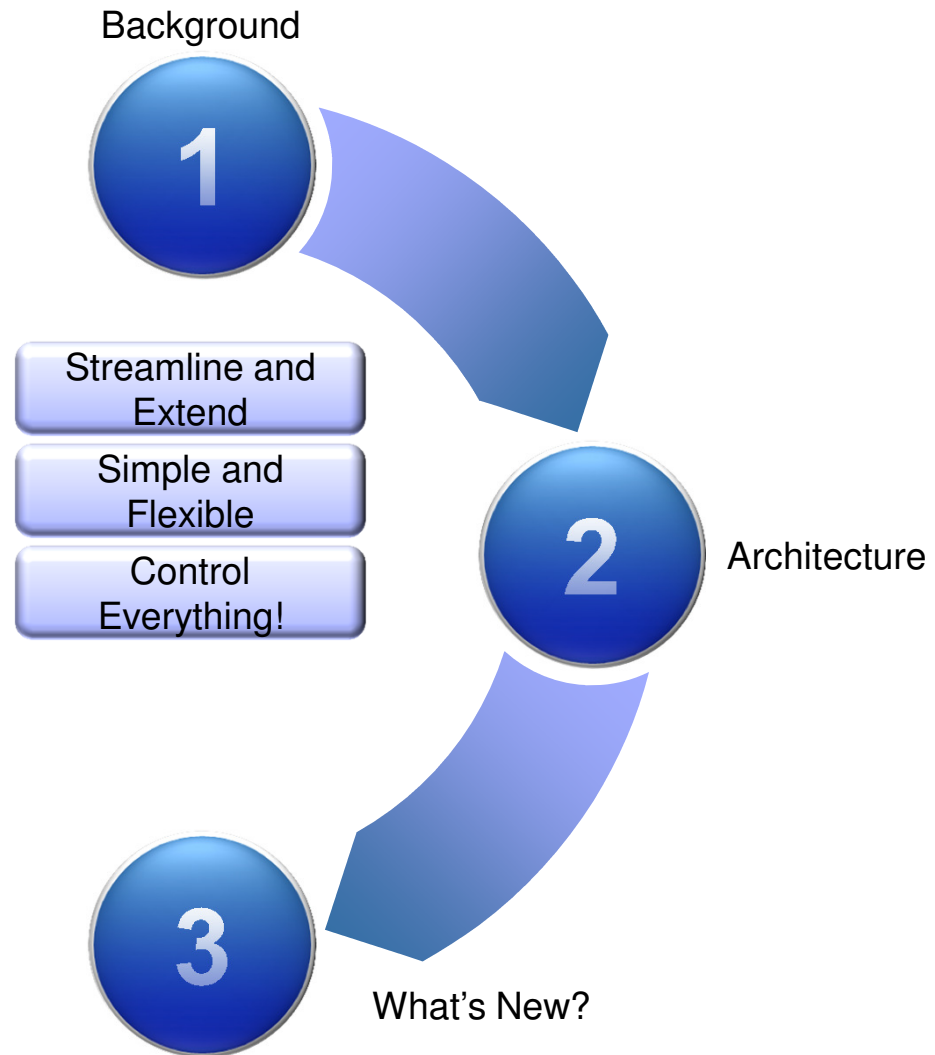
Identify and collect

Options for archiving and re-collection of restored items

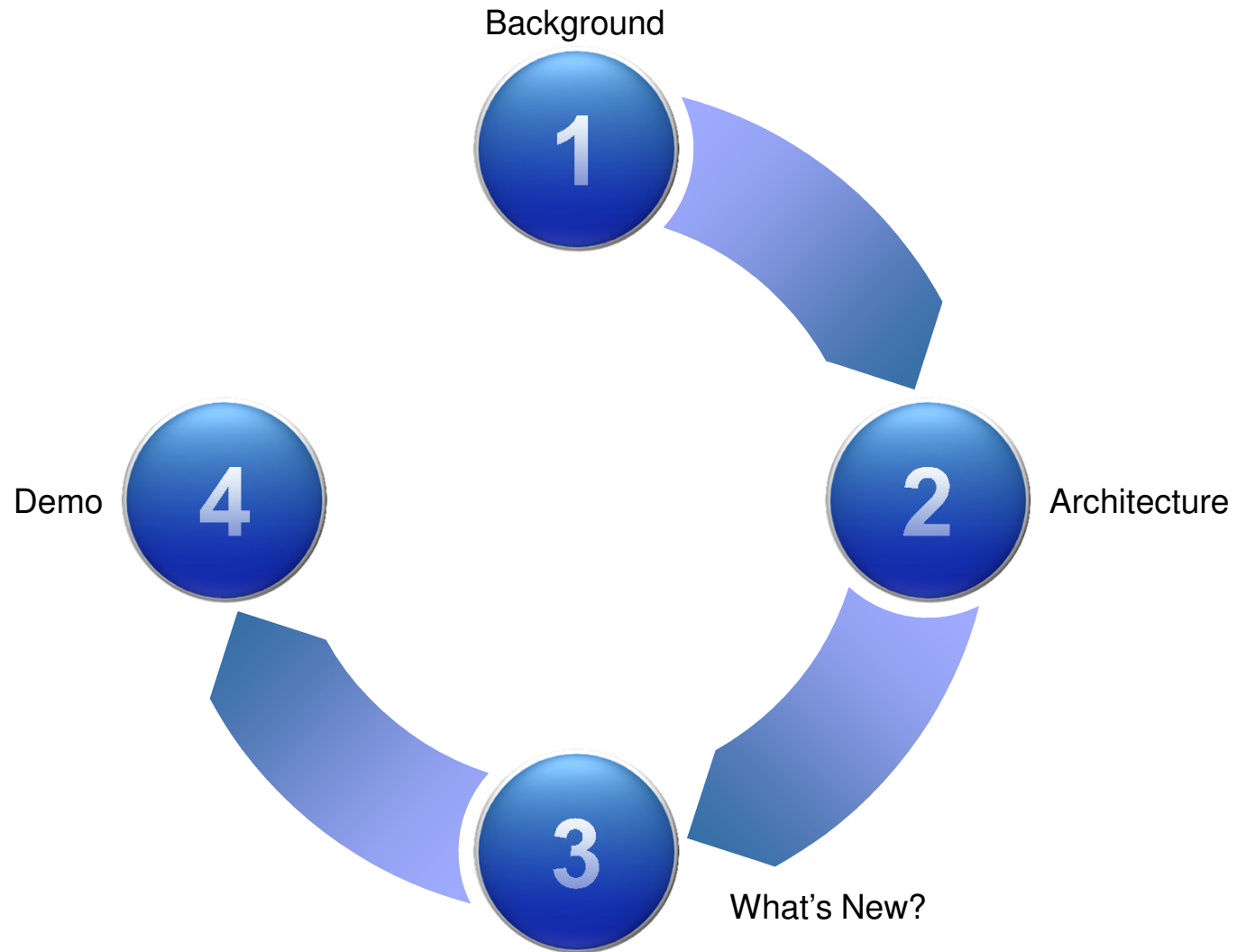
Cleanup links in SharePoint when content deleted from the repository



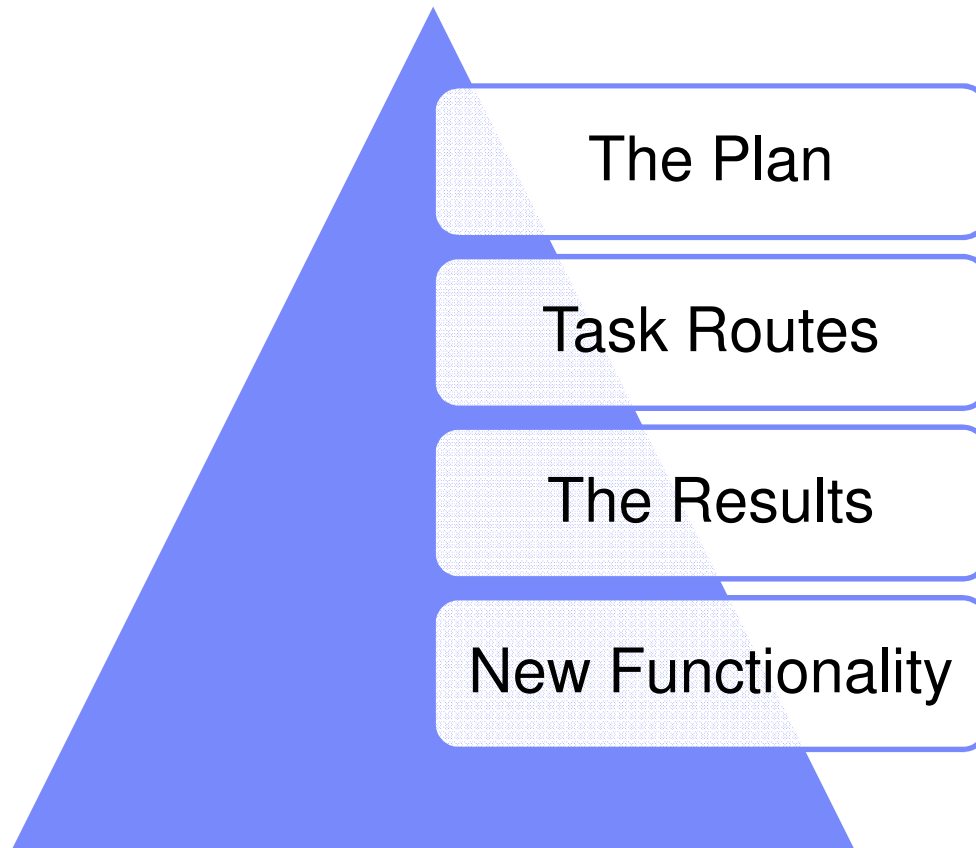
ICC for SharePoint

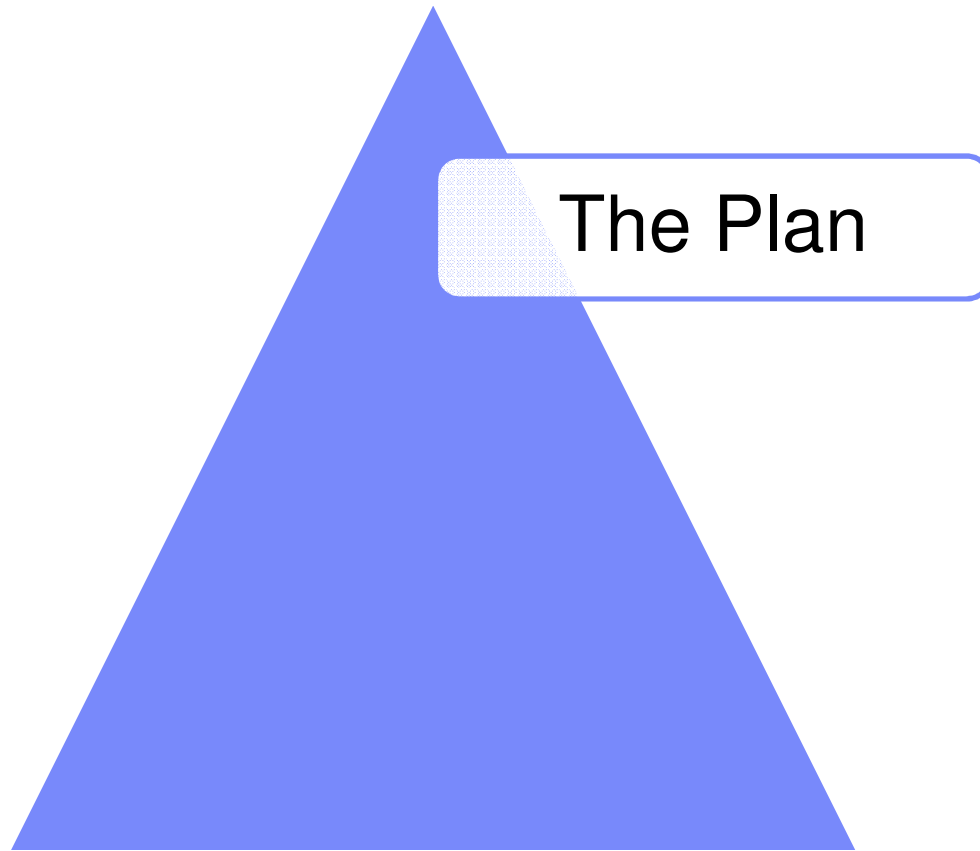


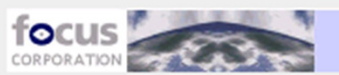
ICC for SharePoint



ICC for SharePoint demo







Welcome to The Contracts Processing Site [Inbox](#) [EDIT LINKS](#)

Search this site

Service Contracts

- Home
- Documents
- Recent
- Service Contracts**
- Contracts
- Site Contents
- Inbox
- [EDIT LINKS](#)

+ new document or drag files here

Contracts All Documents Find a file

Name	Contract Amount	Vendor Name	State/Province	Status
ABC-010001	\$45,000.00	ABC Services	Oregon	Final
ABC-010002	\$55,000.00	ABC Services	Oregon	Final
ACE-020001	\$23,000.00	ACE Corp	Iowa	Final
FXM-020002	\$74,000.00	FXM Corp	Nebraska	Final
FXM-030001	\$83,000.00	FXM Corp	Nebraska	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
LAL-040001	\$89,000.00	Larson and Larson	Kansas	Final
LAL-040002	\$28,000.00	Larson and Larson	Kansas	Final
PAE-040003	\$49,000.00	Palo Engineering	So Dakota	Final

Services Contracts - All Documents - Windows Internet Explorer

http://ecmdemo1/sites/Focus/Contracts/Services%20Contracts/Forms/AllItems.aspx

File Edit View Help

Services (Local)

Services (Local)

IBM Content Collector Task Routing Engine

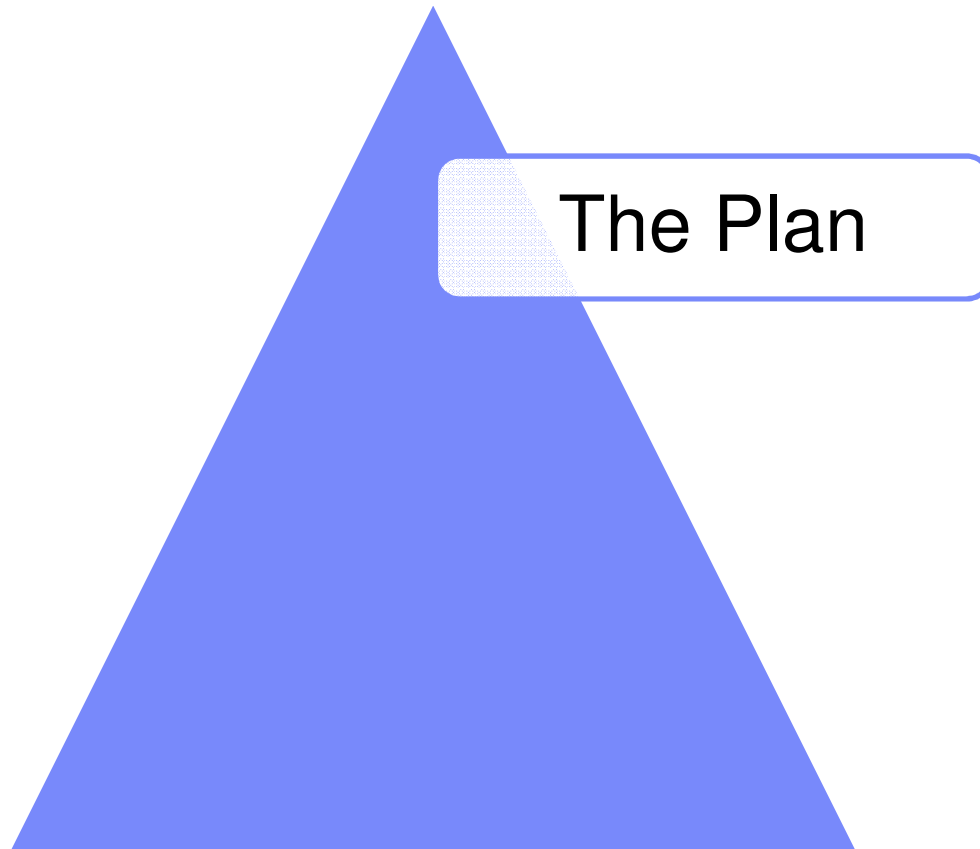
Description:
Controls other IBM Content Collector services

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 Engine			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

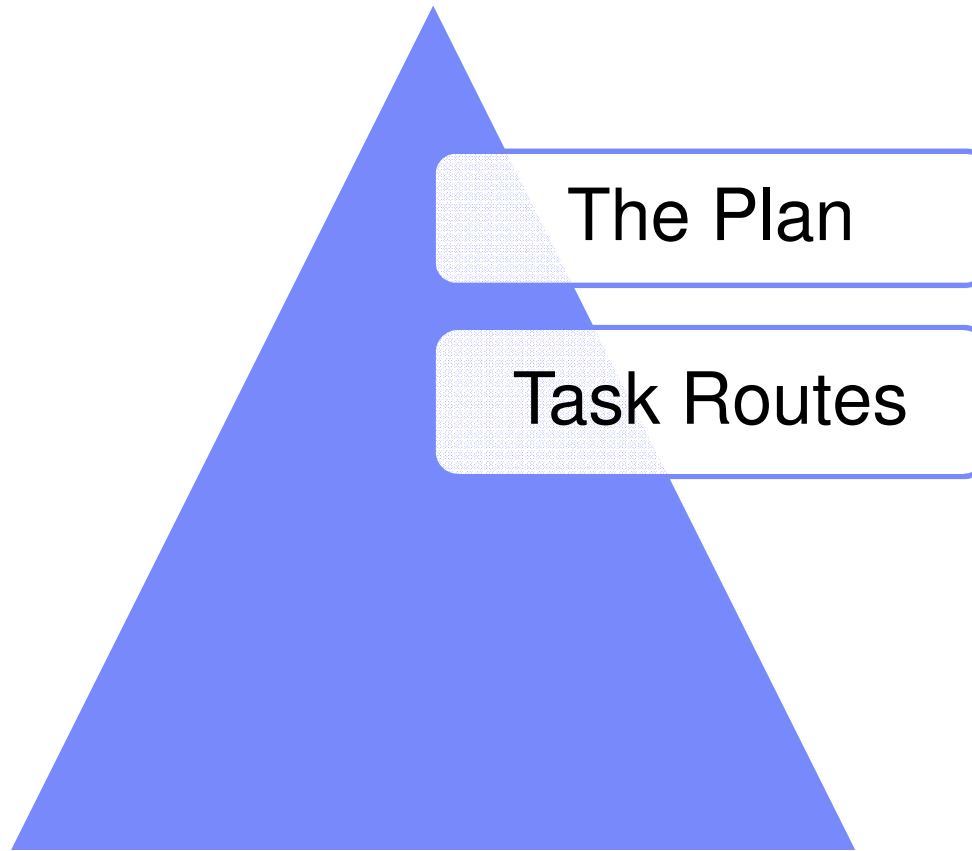
Start service IBM Content Collector Task Routing Engine on Local Computer

Refresh

Logged in as: administrator



ICC for SharePoint demo



IBM Content Collector V4.0

File Edit Tools Help

Configuration Store Connectors Metadata and Lists General Settings **Task Routes**

Explorer

[Type filter text]

- FS to P8 Archiving (Delete Met...
- SP to P8 - Fixes - With V...**
- SP to P8 - With Vendor Folders...

Toolbox

- Pointer
- Decision Point
- Link
- Audit Log
- File System Repositor...
- File System Source
- IBM Connections
- IBM FileNet P8
- SharePoint
- Text Extraction
- Utility
- Web Service

SP to P8 - Fixes - With V... Main Task Route

Task Route

General

Name: SP to P8 - Fixes - With Vendor Folders, Versions [2]

Description: This task route archives versions of SharePoint documents to FileNet P8. In the process, the task route creates a document in P8 with all the versions of each SharePoint document, files it in a folder, and removes all but the most recent version of the document from the SharePoint server.

Active

```

graph TD
    Start(( )) --> D1{1. Only Store if Contract is Final}
    D1 --> T1[SP Get Versions]
    T1 --> T2[P8 Create Version Series]
    T2 --> D2{1. Is most recent version}
    D2 --> T3[P8 File Document in Folder]
    D2 --> J1(( ))
    T3 --> J1
    J1 --> D3{2. Is not most recent version}
    D3 --> T3
    D3 --> J2(( ))
    J2 --> D4{1. Amt LT 50000  
2. > 50000, < 70000  
3. Contract Amt GE 70000}
    D4 --> T4[Delete from SP]
    D4 --> T5[Mark as Processed]
    D4 --> T6[Leave Link in SP]
    T4 --> T7[Audit Log]
    T5 --> T7
    T6 --> T7
    T7 --> End(( ))
  
```

8:58 AM 9/23/2014

IBM Content Collector V4.0

File Edit Tools Help

Configuration Store Connectors Metadata and Lists General Settings **Task Routes**

Explorer [Type filter text]

- FS to P8 Archiving (Delete Met...
- SP to P8 - Fixes - With V...**
- SP to P8 - With Vendor Folders...

Toolbox

- Pointer
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- File System Source
- IBM Connections
- IBM FileNet P8
- SharePoint
- Text Extraction
- Utility
- Web Service

SP to P8 - Fixes - With V... Main Task Route

```

graph TD
    Start((SP Collector)) --> Run(( ))
    Run --> D1{1. Only Store if Contract is Final}
    D1 --> S1[SP Get Versions]
    S1 --> S2[P8 Create Version Series]
    S2 --> D2{1. Is most recent version / 2. Is not most recent version}
    D2 --> S3[P8 File Document in Folder]
    S3 --> D3{1. Amt LT 50000 / 2. > 50000, < 70000 / 3. Contract Amt GE 70000}
  
```

SharePoint Collector

General Schedule Collection Sources

General

Name: SP Collector

Description: This task route archives SharePoint documents to P8, creating a document in P8 for the most recent version of each SharePoint document, filing it in a folder, and locking down the original document on the SharePoint server.

Active

Collection of migrated items

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

Metadata

Add user-defined metadata to output:

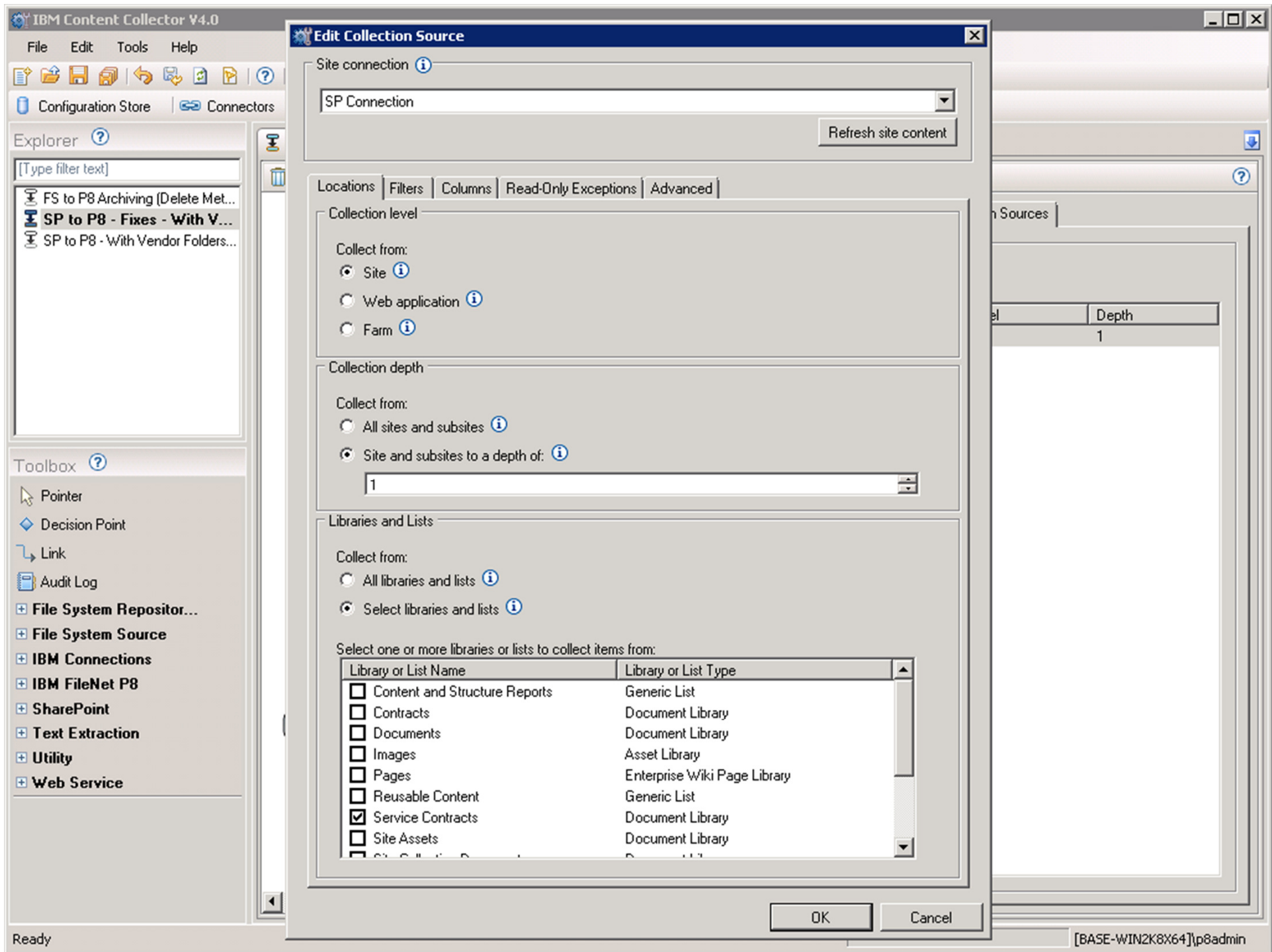
SharePoint Generic Defn

Retain IDs in values:

ID and value delimiter:

Multiple values delimiter:

Ready [BASE-WIN2K8X64]p8admin



IBM Content Collector V4.0

File Edit Tools Help

Configuration Store Connectors Metadata and Lists General Settings **Task Routes**

Explorer

[Type filter text]

- FS to P8 Archiving (Delete Met...
- SP to P8 - Fixes - With V...**
- SP to P8 - With Vendor Folders...

Toolbox

- Pointer
- Decision Point
- Link
- Audit Log
- File System Repositor...
- File System Source
- IBM Connections
- IBM FileNet P8
- SharePoint
- Text Extraction
- Utility
- Web Service

SP to P8 - Fixes - With V... x

Main Task Route

```

graph TD
    SP_Collector[SP Collector] --> DP1{1. Only Store if Contract is Final}
    DP1 --> SP_Get_Versions[SP Get Versions]
    SP_Get_Versions --> P8_Create_VS[P8 Create Version Series]
    P8_Create_VS --> DP2{1. Is most recent version}
    P8_Create_VS --> DP3{2. Is not most recent version}
    DP2 --> P8_File_Doc[P8 File Document in Folder]
    DP3 --> DP4{1. Amt LT 50000, 2. > 50000, < 70000, 3. Contract Amt GE 70000}
  
```

P8 Create Version Series

Object store: ELM
Server: base-win2k8x64

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: <https://base-win2k8x64:11443/AFUWeb/RetrieveDocument.do>

Property Mappings

Document class: ICCSharepointInstance 2

Show "Hidden Properties"

Property	Value
Document Title	<SP Collection, Name>
ICCCreatedDate	<SP Collection, Created>
ICCEXpirationDate	
ICCLastModifiedDate	<SP Collection, Modified>
ICCFilename	<SP Collection, Name>

Ready [BASE-WIN2K8X64]p8admin

IBM Content Collector V4.0

File Edit Tools Help

Configuration Store Connectors Metadata and Lists General Settings **Task Routes**

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- Web Service

SP to P8 - Fixes - With V... Main Task Route

```

graph TD
    Start[SP Versions] --> Create[P8 Create Version Series]
    Create --> DP1{ }
    DP1 -- "1. Is most recent version" --> Folder[P8 File Document in Folder]
    DP1 -- "2. Is not most recent version" --> DP2{ }
    DP2 -- "1. Amt LT 50000" --> Delete[Delete from SP]
    DP2 -- "2. > 50000, < 70000" --> Mark[Mark as Processed]
    DP2 -- "3. Contract Amt GE 70000" --> Link[Leave Link in SP]
    Delete --> Audit[Audit Log]
    Mark --> Audit
    Link --> Audit
    Audit --> End[ ]
  
```

SP Post-processing

General

Name: Mark as Processed

Description: SP Post-processing determines how and if migrated items appear in SharePoint after processing.

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*

Ready [BASE-WIN2K8X64]p8admin

IBM Content Collector V4.0

File Edit Tools Help

Configuration Store Connectors Metadata and Lists General Settings **Task Routes**

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Toolbox [?]

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- File System Source
- IBM Connections
- IBM FileNet P8
- SharePoint
- Text Extraction
- Utility
- Web Service

SP to P8 - Fixes - With V...

Main Task Route

```

graph TD
    A[SP Versions] --> B[P8 Create Version Series]
    B --> C{ }
    C -- "1. Is most recent version" --> D[P8 File Document in Folder]
    C -- "2. Is not most recent version" --> E{ }
    E -- "1. Amt LT 50000" --> F[Delete from SP]
    E -- "2. > 50000, < 70000" --> G[Mark as Processed]
    E -- "3. Contract Amt GE 70000" --> H[Leave Link in SP]
    F --> I[Audit Log]
    G --> I
    H --> I
    I --> J[ ]
  
```

Audit Log

General

Name: Audit Log

Description: The audit log task logs information about the entities that were processed, for example the processing status and the selected metadata properties.

Settings

Audit log file name format:

Use default

Specify file identifier: **SUCCESS**

Field Delimiter: |

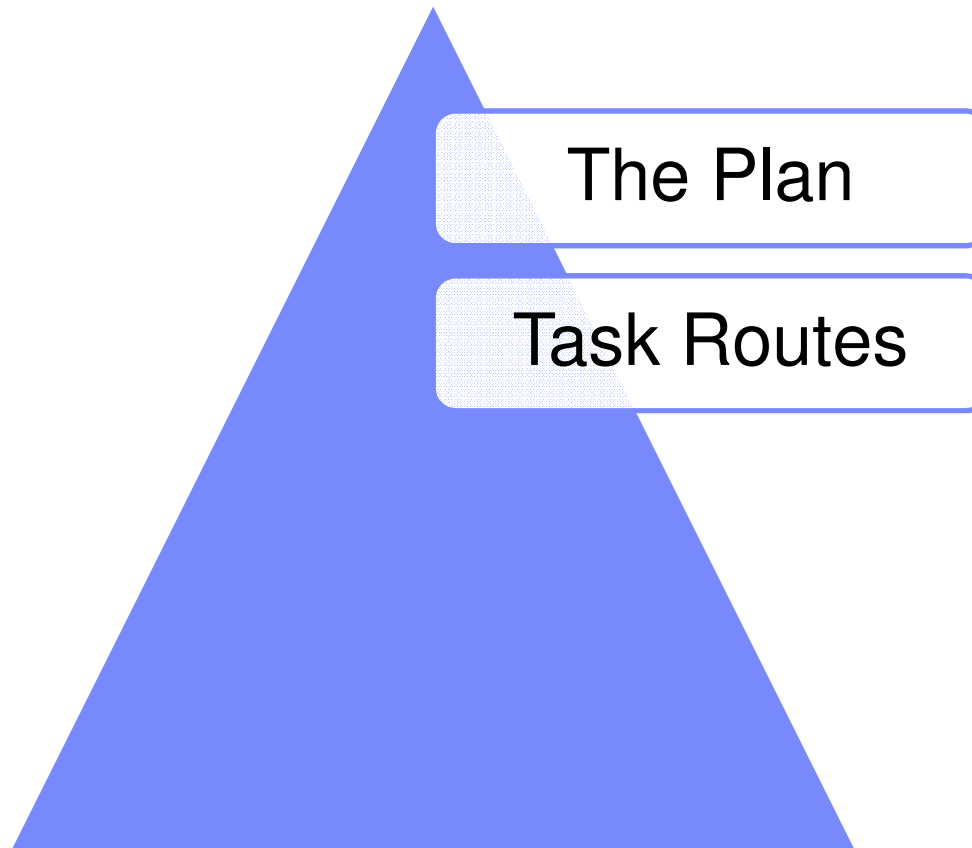
Value delimiter: |

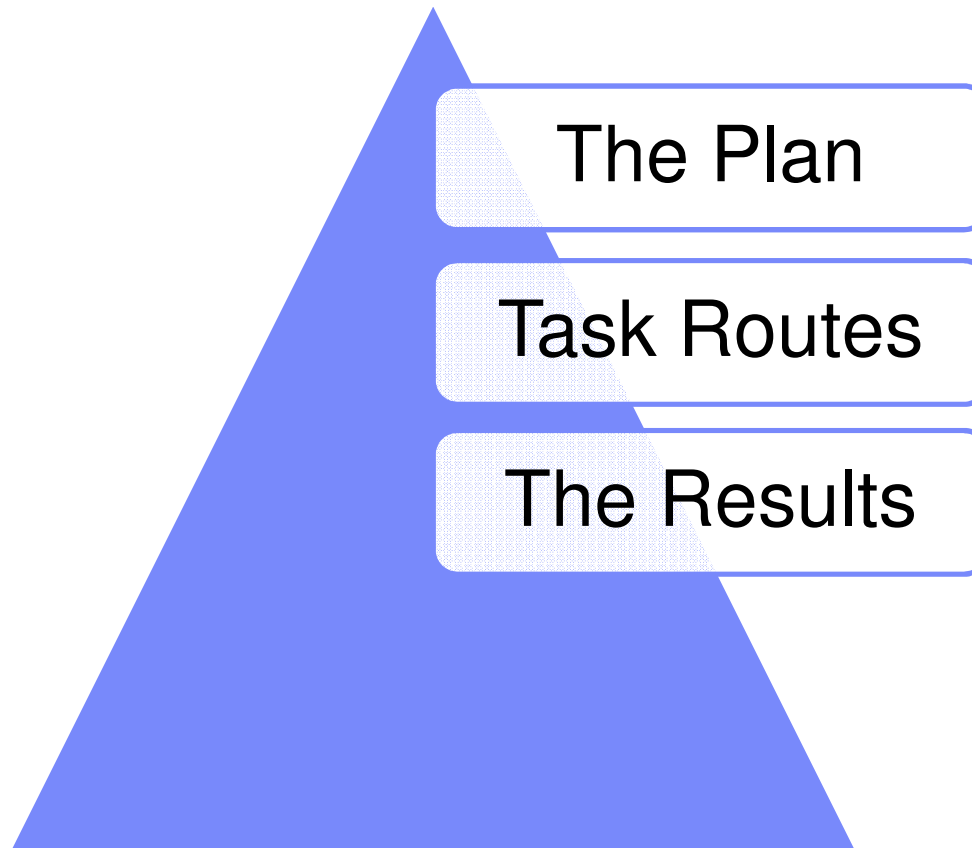
Quote character: ' |

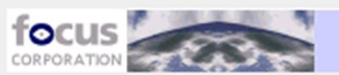
Audit log fields: Show/hide IDs

- Collector Information
- File
- HTTP URL
- P8 Create Document
 - Connection name
 - Is Duplicate
 - Object Class
 - Object ID

Ready [BASE-WIN2K8X64]p8admin







Welcome to The Contracts Processing Site [Inbox](#) [EDIT LINKS](#)

Search this site

Service Contracts

- Home
- Documents
- Recent
- Service Contracts**
- Contracts
- Site Contents
- Inbox
- [EDIT LINKS](#)

+ new document or drag files here

Contracts All Documents Find a file

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-030001.doc	\$83,000.00	FXM Corp	Nebraska	Final
FXM-020002.doc	\$74,000.00	FXM Corp	Nebraska	Final
LAL-040001.doc	\$89,000.00	Larson and Larson	Kansas	Final

Copy Review Dan Misawa IBM

Links HR

Refresh Add Document New Folder Actions

HR

Name

Edit Item
 Delete Item
 Version History
 Shared With
 Check Out
 Alert Me
 Manage Copies
 Workflows
 Manage Actions

- Home
- Documents
- Recent
 - Service Contracts
 - Contracts
- Site Contents
- Inbox
- EDIT LINKS

Contract Amount	\$55,000.00
Migrated	Yes
Migrated Information	RT: P8 RN: ECM RD: {29943DB4-1779-4101-AA79-43ED7839569B} ID: {8DF12EC9-BEC8-4B76-AE6C-55BB237D5598} VD: {35CCA7CD-135F-4ACF-BACA-96E7FB67BCE6} VC: 1 LV: 1.0 MD: 2014-09-23T12:56:58Z
State/Province	Oregon
Status	Final
Title	ABC-010002
URL	
Vendor Name	ABC Services
Name	ABC-010002.doc

Content Type: Document
 Created at 1/7/2014 6:13 PM by System Account
 Last modified at 1/8/2014 1:00 PM by System Account

Close

Edit Item
 Shared With
 Delete Item
 Manage

Version History
 Alert Me
 Check Out
 Manage Copies
 Workflows
 Actions

- Home
- Documents
- Recent
- Service Contracts
- Contracts
- Site Contents
- Inbox
- EDIT LINKS

Name LAL-040001.doc.aspx

URL http://base-win2k8x64:81/sites/Focus/_layouts/ICCSPLinkHandler.aspx?GUID=a6d8b696-1269-49a2-9287-e7073211c116

Migrated Yes

Migrated Information RT: P8
 RN: ECM
 RD: {29943DB4-1779-4101-AA79-43ED7839569B}
 ID: {0D65028C-9EC5-4CD9-A63C-DD239113DCFF}
 VD: {05CCAF94-6CB3-4105-91FF-D1AE721D1625}
 VC: 1
 LV: 0.0
 MD: 2014-09-23T12:56:58Z

Content Type: Migrated Document Link
 Created at 1/8/2014 1:08 PM by System Account
 Last modified at 1/8/2014 1:09 PM by System Account

Close

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-030001.doc	...	\$83,000.00	FXM Corp	Nebraska	Final
FXM-020002.doc	...	\$74,000.00	FXM Corp	Nebraska	Final
LAL-040001.doc	...	\$89,000.00	Larson and Larson	Kansas	Final

Page Viewer

Copy Review Dan Misawa IBM

Links

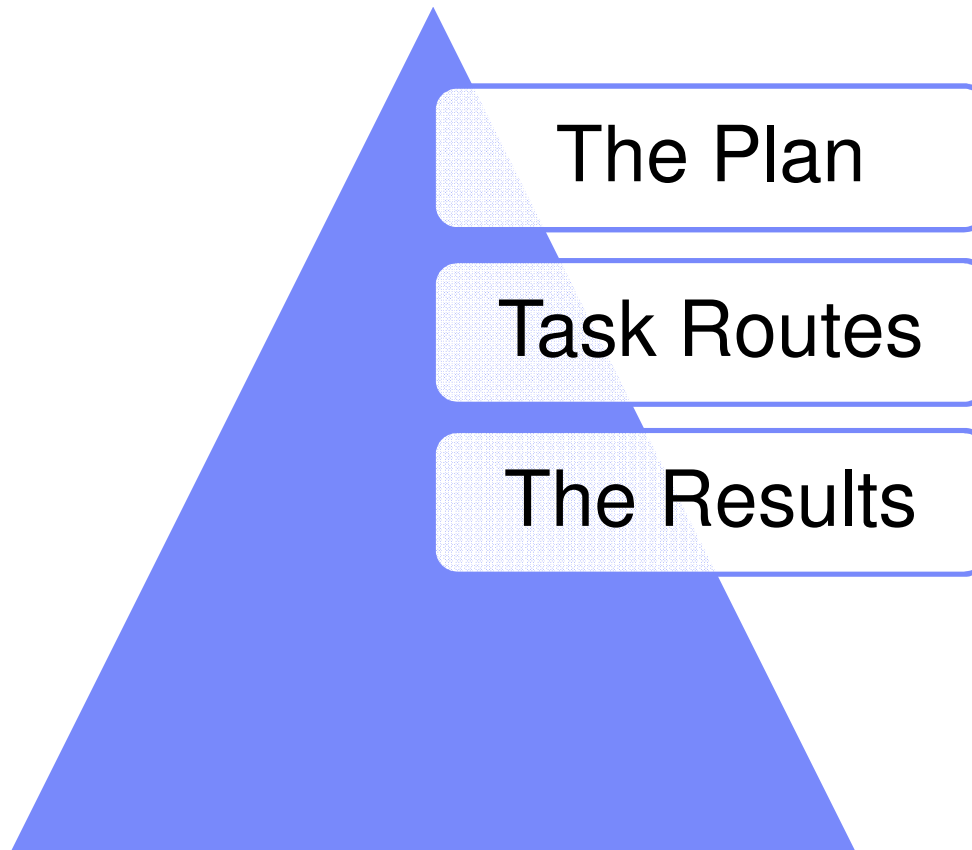
- Approved Services Contrac
 - ABC Services
 - ACE Corp
 - FXM Corp
 - Larson and Larson
 - Palo Engineering

Refresh Add Document New Folder Actions

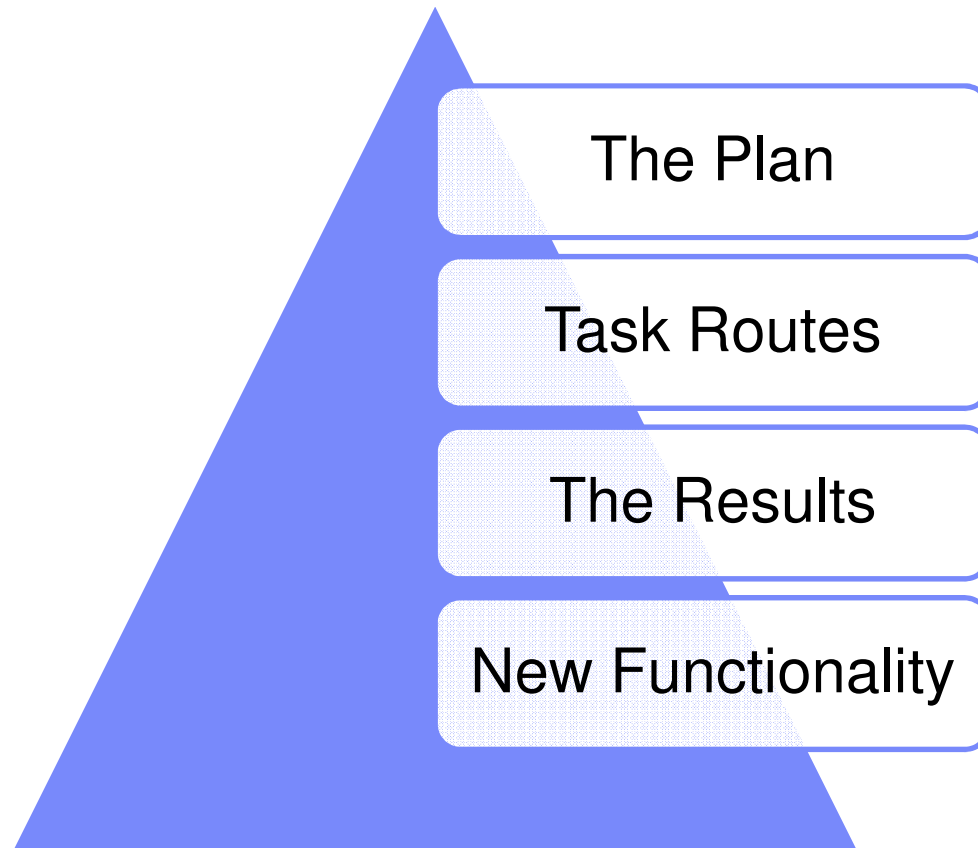
Approved Services Contracts

Name
ABC Services
ACE Corp
FXM Corp
Larson and Larson
Palo Engineering

No item is selected.



ICC for SharePoint demo



ICN* 2.0.3 Web Parts for SharePoint 2013



-
- What can I do with SharePoint?
 - Setting up integration
 - Plugins
 - Repositories
 - Menus
 - Desktops
 - Using Web Parts
 - Browse
 - Search
 - Work
 - SharePoint and Content Navigator
 - Cross-Repository Search

What can I do with SharePoint?



Mix and match to create the right solution!

- From SharePoint, directly exploit Content Navigator
 - Content
 - Work
 - Search
 - All the functionality exposed via ICN
- From Content Navigator, copy content to SharePoint
- From Content Navigator, search, use, and activate SharePoint documents via CMIS
- Collect, control, organize, and automate SharePoint content into ECM, but use it natively in the SharePoint UI
- Share and access the collected, controlled, organized and automated content (previously in SharePoint) in FileNet

What can I do with SharePoint?

Use Navigator from inside SharePoint

- I love SharePoint
- I need all the useful things that Navigator gives me, like access to CMoD and other repositories, sophisticated workflows, and cross repository searches
- I add the webparts for Content Navigator to my web page, or use the SharePoint native HTML web part

- I now have Navigator embedded in my SharePoint site!
- I can even theme Navigator to look like SharePoint! My users will feel comfortable.

What can I do with SharePoint?

Copy into SharePoint

- I work with people who love SharePoint, that's where I need to share it with them.
- So, I copy it into their SharePoint site.

- SO easy!

What can I do with SharePoint?

Search, use, and activate SharePoint documents via CMIS

- I love Navigator
- IBM and CMIS repositories consolidated!
- Now I can
 - Search across SharePoint from Navigator
 - Search across SharePoint and OTHER sources with Navigator
 - Work with SharePoint documents (check in, out, edit, etc.)
 - Use SharePoint documents as attachments in workflows
- Mobile Apps
- Sophisticated workflows

What can I do with SharePoint?

Use Content Collector to organize, control, and activate

- Some of us love SharePoint, AND some Navigator

- Need to
 - share and protect information
 - speed up SharePoint
 - consolidate resources
 - de-duplicate/organize/reuse information better/ etc.

- Use Content Collector to gather content from SharePoint, and either copy, move, or move it and leave a stub behind (or a combination)

- Looks just like SharePoint

Setting Up Integration Plug-ins

The screenshot shows the IBM Case Manager administration console in a Firefox browser window. The page title is "Copy Review". The user is logged in as "p8admin". The left sidebar contains navigation options: Desktops, Repositories, Sync Services, FileNet Content Manager, Content Manager OnDemand, Daeja ViewONE, Viewer Maps, Plug-ins (selected), Menus, Labels, Themes, Icon Mapping, and Settings. The main content area has tabs for "Desktops", "Repositories", "SharePoint 2013 Contracts", "*New Repository", and "Plug-ins".

You must use the administration tool to register plug-ins for the web client. If a plug-in requires additional configuration, the configuration parameters are displayed after you register the plug-in.

Important: If you edit a plug-in that is referenced in another area of the administration tool, such as a menu, you might encounter problems with the behavior of the plug-in. In addition, the plug-ins are invoked in the order that they are listed. If a plug-in needs to be run before another plug-in, ensure that the plug-ins are listed in the order in which they must be run.

Buttons: New Plug-in, Edit, Enable, Disable, Delete, Refresh, Move Up, Move Down, Save Order, Name contains

Name	Version
External Data Services Support	2.0.3
IBM Case Manager API plug-in	5.2.0.1 (icmapi5.2.0.001.002.002)
IBM Case Manager administration plug-in	5.2.0.1 (icmadmin5.2.0.001.001.041)
IBM Case Manager client plug-in	5.2.0.1 (icmclient5.2.0.001.002.001)
IBM Content Analytics with Enterprise Search	2.0.3
IBM Content Classification	2.0.2
IBM QuickFile Plug-in	2.0.3
IBM Sametime and Connections plug-in	2.0.3
Portal Plug-in	2.0.3
Microsoft SharePoint Plug-in	2.0.3

Setting Up Integration Repositories

The screenshot shows the Copy Review application interface. The left sidebar contains navigation options: Desktops, Repositories, Sync Services, FileNet Content Manager, Content Manager OnDemand, Daeja ViewONE, Viewer Maps, Plug-ins, Menus, Labels, Themes, Icon Mapping, and Settings. The main area displays a 'New Repository' dialog box with a dropdown menu open, showing options: Content Manager, Content Manager OnDemand, FileNet Content Manager, Content Management Interoperability Services (CMIS), and Connection to Microsoft SharePoint Site. The last two options are circled in red. Below the dialog is a table of existing repositories.

			Server Type	Server Name
			FileNet Content Manager	iiop://base-win2k8x64.ecmdemo.ibm.com:2811/FileNet/Engine
OD	IBM CM OnDemand	IBMCMOnDemand	Content Manager OnDemand	localhost
P8	IBM FileNet and Connections	IBMConnections	FileNet Content Manager	iiop://base-win2k8x64.ecmdemo.ibm.com:2811/FileNet/Engine
P8	ICMCMDS	icmcmdos	FileNet Content Manager	iiop://Base-Win2k8x64.ecmdemo.ibm.com:2811/FileNet/Engine
P8	ICMCMTOS	icmcmtos	FileNet Content Manager	iiop://Base-Win2k8x64.ecmdemo.ibm.com:2811/FileNet/Engine
CMIS	SharePoint 2013 Contracts	SharePoint2013	Content Management Interoperability Services (CMIS)	http://base-win2k8x64:81/sites/Focus/_vti_bin/cmris/rest?getRepositories

Setting Up Integration Menus

The screenshot shows the IBM Copy Review web application interface. The browser window title is "Copy Review" and the address bar shows the URL: `https://base-win2k8x64.ecmdemo.ibm.com/navigator/?desktop=CopyReview`. The user is logged in as "p8admin".

The left sidebar contains a navigation menu with the following items: Desktops, Repositories, Sync Services, FileNet Content Manager, Content Manager OnDemand, Daeja ViewONE, Viewer Maps, Plug-ins, **Menus** (selected), Labels, Themes, Icon Mapping, and Settings.

The main content area is titled "Default Document Context Menu with QuickFile" and includes the following configuration fields:

- Name:** Default Document Context Menu with QuickFile
- ID:** DocumentContextMenuwithQuickFile
- Description:** Displayed when the user right-clicks a document in
- Type:** Document context menu

Below the configuration fields are two buttons: "Add Separator" and "Add Submenu".

The interface also features two lists for menu items:

- Available:**
 - Add and Classify Document
 - Add to Microsoft SharePoint
 - All Parts as a PDF file
 - All Parts as a PDF File
 - As PDF
 - Open
 - View Child Documents
- Selected:**
 - DocumentContextMenuwithQuickFile
 - Open
 - Preview
 - Properties
 - View Notes
 - Download
 - Add to Favorites
 - Export
 - Delete
 -

Setting Up Integration Desktops

The screenshot shows a web browser window with the URL `https://base-win2k8x64.ecmdemo.ibm.com/navigator/?desktop=CopyReview`. The page title is "Copy Review". The interface includes a left-hand navigation menu with options: Home, Desktops, Repositories, Sync Services, FileNet Content Manager, Content Manager OnDemand, Daeja ViewONE, Viewer Maps, Plug-ins, Menus, Labels, Themes, Icon Mapping, and Settings. The main content area has tabs for "Desktops" and "Copy Review". Below the tabs are buttons for "Save and Close", "Save", "Reset", and "Close". The "Desktop: Copy Review" section has sub-tabs for "General", "Repositories", "Layout", "Appearance", "Menus", "Workflows", and "Mobile". The "Repositories" tab is active, showing instructions: "Specify which repositories you want users to have access to from this desktop. You must configure your repositories before you can add them to the desktop." and a tip: "Tip: You can limit which repositories are available for each feature when you configure the desktop layout." There is a "Filter" input field. Two columns are present: "Available Repositories" and "Selected Repositories". The "Available Repositories" list includes "Connection to SharePoint Contracts" (highlighted with a dashed border), "ICMCMDS", "ICMCMTOS", and "SharePoint 2013 Contracts". The "Selected Repositories" list includes "ECM", "IBM FileNet and Connections", and "IBM CM OnDemand". Arrows between the columns allow for moving items. A status bar at the bottom reads: "9/9/2014, 5:37 PM - The Customer Contracts folder returned 4 items."

Using Web Parts

Browse - View folders, etc.

The screenshot shows a SharePoint site titled "Welcome to The Contracts Processing Site" in a Windows Internet Explorer browser. The site features a navigation menu on the left with options like Home, Documents, Recent, Service Contracts, Contracts, Site Contents, Inbox, and Search. The main content area displays a "Browse (IBM Content Navigator)" view of a folder structure. At the top of the browser view, there are action buttons: Refresh, Add Document, New Folder, and Actions. Below this is a table listing folders under the "Root" directory, including Customer Contracts, Entry Templates, Finance, HR, IBM Global Financing, IT, Images, Incoming, Invoices, Legal, Marketing, and Mergers and Acquisitions. Each folder entry shows its name, the user who modified it (e.g., p8admin or wasadmin), and the modification date and time.

Name	Modified By	Modified On
Customer Contracts	p8admin	10/21/2013, 2:03 PM
Entry Templates	p8admin	9/11/2014, 12:25 PM
Finance	p8admin	9/13/2013, 3:14 AM
HR	p8admin	9/23/2013, 5:31 PM
IBM Global Financing	p8admin	10/21/2013, 10:13 AM
IT	wasadmin	9/3/2013, 12:46 PM
Images	p8admin	10/22/2013, 12:31 PM
Incoming	p8admin	9/5/2013, 1:33 PM
Invoices	p8admin	10/21/2013, 2:02 PM
Legal	p8admin	9/3/2013, 11:00 AM
Marketing	wasadmin	9/3/2013, 12:45 PM
Mergers and Acquisitions	p8admin	9/11/2013, 2:02 PM

Using Web Parts

Browse - Drag and drop to add a new file

The screenshot shows a SharePoint site titled "Welcome to The Contracts Processing Site" in a Windows Internet Explorer browser. The site has a navigation menu on the left with options like Home, Documents, Recent, Service Contracts, Contracts, Site Contents, Inbox, and Search. The main content area is titled "Browse (IBM Content Navigator)" and displays a list of folders under the "Root" directory. A file browser window is open over the "IT" folder, showing a list of files. A red arrow points from the "IT" folder in the SharePoint interface to the "Requesting a new Project.doc" file in the file browser window. The file browser window also shows a status bar at the bottom indicating the file is shared and the user is p8admin.

SharePoint

System Account

BROWSE PAGE SHARE FOLLOW SYNC EDIT

Welcome to The Contracts Processing Site

Home Documents Recent Service Contracts Contracts Site Contents Inbox Search

Welcome to The Contracts Processing Site

Browse (IBM Content Navigator)

Refresh Add Document New Folder Action

Name
Customer Contracts
Entry Templates
Finance
HR
IBM Global Financing
IT
Images
Incoming
Invoices
Legal
Marketing
Mergers and Acquisitions

content

temp content

Organize Open Share with Print New Folder

Name	Date modified
Bridge.jpg	10/22/2013
CDC ISO SOP template.doc	6/7/2013
ISOProcedureTemplate.doc	6/7/2013
NCHICA HIPPA Policy Template.doc	6/7/2013
Really Clean 2010 Contract Agreement.doc	7/17/2013
Requesting a new Project.doc	6/22/2013
RET RFP.pdf	1/19/2013

Requesting a new Project.doc
Microsoft Word 97 - 2003 Document
State: Shared

p8admin 9/11/2013, 2:02 PM

Using Web Parts

Browse – Select Document Class

The screenshot shows a Windows Internet Explorer browser window displaying a SharePoint site titled "Welcome to The Contracts Processing Site - Home". The address bar shows the URL "http://base-win2k8x64:81/sites/F...". The page header includes "SharePoint" and "System Account". The main content area is titled "Browse (IBM Content Navigator)" and features a "General" section with "Save in:" set to "Requesting a new Project.doc" and a checked "Major version" option. The "Properties" section shows a "Class:" dropdown menu with "Document" selected. A list of document classes is displayed, with "Insurance" highlighted. Other classes include Employee Offer Letter, Enterprise Procedure, Finance Template, Form Template, ICCDocument, Invoice, Local Procedure, Marketing Plan, Photos, and Policy and Procedure Template. An "Add Document" dialog box is open on the right, containing instructions and a list of recent documents. The "Documents" section at the bottom of the page is partially visible.

Welcome to The Contracts Processing Site - Home - Windows Internet Explorer

http://base-win2k8x64:81/sites/F... Welcome to The Contracts P...

SharePoint System Account

BROWSE PAGE SHARE FOLLOW SYNC EDIT

Home Documents Recent Service Contracts Contracts Site Contents Inbox Search EDIT LINKS

Welcome to the Contracts Processing Site

Browse (IBM Content Navigator)

General

Save in: Requesting a new Project.doc

Major version ?

Properties

Class: Document

- Employee Offer Letter
- Enterprise Procedure
- Finance Template
- Form Template
- ICCDocument
- Insurance
- Invoice
- Local Procedure
- Marketing Plan
- Photos
- Policy and Procedure Template

OK Cancel

Add Document

The values that you enter for the document properties can be used to find the document later.

4/12/25

3/3/14 AM

3/5/31 PM

13/10/13

12:46 PM

13/12/31

1/33 PM

13/2/02

11:00 AM

Add

Cancel

Documents

Using Web Parts

Browse – Enter Metadata

The screenshot shows a Windows Internet Explorer browser window displaying a SharePoint site. The browser's address bar shows the URL `http://base-win2k8x64:81/sites/F`. The SharePoint page header includes the 'SharePoint' logo, 'System Account', and navigation options like 'BROWSE', 'PAGE', 'SHARE', 'FOLLOW', 'SYNC', 'EDIT', and 'EDIT LINKS'. The main content area is titled 'Welcome to The Contracts Processing Site' and features a 'Browse (IBM Content Navigator)' web part. This web part is divided into two sections: 'General' and 'Properties'. The 'General' section includes a 'Save in' dropdown set to 'IT', a 'File name' field containing 'Requesting a new Project.doc', and a checked 'Major version' option. The 'Properties' section shows a 'Class' dropdown set to 'Insurance' and several metadata fields: 'Document Title' (Requesting a new Project.doc), 'Language' (empty), 'InsuranceType' (Big Insurance), and 'InsuranceBusinessPartner' (My Partner). On the right side of the page, an 'Add Document' dialog box is open, displaying a list of recent documents with timestamps and 'Add' and 'Cancel' buttons at the bottom.

Welcome to The Contracts Processing Site - Home - Windows Internet Explorer

http://base-win2k8x64:81/sites/F

Welcome to The Contracts Processing Site

SharePoint System Account

BROWSE PAGE SHARE FOLLOW SYNC EDIT EDIT LINKS

focus CORPORATION

Welcome to The Contracts Processing Site Inbox Search EDIT LINKS Search this site

Welcome to The Contracts Processing Site

Home Documents Recent Service Contracts Contracts Site Contents Inbox Search EDIT LINKS

Browse (IBM Content Navigator)

General

* Save in: IT

File name: Requesting a new Project.doc

Major version ?

Properties

* Class: Insurance

Document Title: ? Requesting a new Project.doc

Language: ?

InsuranceType: ? Big Insurance

InsuranceBusinessPartner: ? My Partner

Add Document

The values that you enter for the document properties can be used to find the document later.

12:25
3:14 AM
4:38 AM
10:13
4:38 AM
3:12:01
1:35 PM
10:20
11:00 AM
Add
Cancel

Using Web Parts

Browse – the document is added

The screenshot shows a SharePoint web browser interface. The browser title is "Welcome to The Contracts Processing Site - Home - Windows Internet Explorer". The address bar shows the URL "http://base-win2k8x64:81/sites/F". The SharePoint header includes "SharePoint" and "System Account". The main content area displays "Welcome to The Contracts Processing Site" and "Browse (IBM Content Navigator)". A document list table is visible with the following data:

Name	Size	Modified By	Modified On	Major Version
Requesting a new Project.doc	44 KB	Dan	9/23/2014, 7:40 AM	1

Using Web Parts

Search – Enter Search Criteria

Search - Windows Internet Explorer

http://base-win2k8x64:81/sites/F

Search

SharePoint

System Account

BROWSE PAGE PUBLISH

SHARE FOLLOW EDIT

focus CORPORATION

Welcome to The Contracts Processing Site

Inbox EDIT LINKS

Search this site

Home

Documents

Recent

Service Contracts

Contracts

Site Contents

Inbox

EDIT LINKS

Checked out to you Only you can see your recent changes. [Check it in.](#)

Search (IBM Content Navigator)

IBM FileNet and Connections

New Search

Name contains

Recent Searches

All Searches

- All Deals
- All policies and procedu
- AllProjectDocumentsAp
- Compare Invoices
- EmployeeRatings
- HR Documents
- New Ad Copy
- Policy Template Search
- Published Policies
- SearchFolderName
- SearchforProjectFolderB
- SharePoint Contracts inf
- SharePoint and FCM Cor

New Search

Search Criteria

Search in: \IBM FileNet and Connections (Including sub... Search options: Document

Class: Document (Including subclasses)

Find items with the following terms: ?

Use a combination of terms and operators: * ? or ""

Text options: Any of the terms

Document Title ? Contains

Add Property Show All Properties Property options: Match all

Search Reset Save Save As... Cancel Results Display

Keep search criteria open

Using Web Parts

Search – Change search to Created (today)

The screenshot shows a SharePoint search page in Internet Explorer. The browser title is "Search - Windows Internet Explorer" and the address bar shows "http://base-win2k8x64:81/sites/F". The page header includes "SharePoint" and "System Account". The main content area is titled "Search (IBM Content Navigator)" and features a search box with the text "Name contains". A dropdown menu is open, listing various search properties: Customer Name, Date Checked In (highlighted), Date Content Last Accessed, Department, Description, Document Title, Downloads, Editors, and Effective Date Plan. Below the dropdown, there are fields for "Document Title" and "Contains". The page also includes a navigation sidebar on the left with links like "Home", "Documents", and "Recent", and a yellow notification banner at the top stating "Checked out to you".

Using Web Parts

Search – Change search to Created (today)

Search - Windows Internet Explorer

http://base-win2k8x64:81/sites/F

SharePoint

System Account

BROWSE PAGE PUBLISH

SHARE FOLLOW EDIT

Welcome to The Contracts Processing Site

Inbox EDIT LINKS

Search this site

focus CORPORATION

Home

Documents

Recent

Service Contracts

Contracts

Site Contents

Inbox

EDIT LINKS

Checked out to you Only you can see your recent changes. [Check it in.](#)

Search (IBM Content Navigator)

IBM FileNet and Conne

New Search

Name contains

Recent Searches

All Searches

- All Deals
- All policies and procedu
- AllProjectDocumentsApp
- Compare Invoices
- EmployeeRatings
- HR Documents
- New Ad Copy
- Policy Template Search
- Published Policies
- SearchFolderName
- SearchforProjectFolderB
- SharePoint Contracts inf
- SharePoint and FCM Cor

New Search

Search Criteria

Search in: \IBM FileNet and Connections (Including sut... Search options: Documents, F

Class: Document (Including subclasses)

Find items with the following terms: ?

Use a combination of terms and operators: * ? or ""

Text options: Any of the terms

Date Checked In ? Equals 9/23/2014

Add Property Show All Properties Property options: Match all

Search Reset Save Save As... Cancel Results Display

Keep search criteria open

Using Web Parts

Search – Your document appears

Search - Windows Internet Explorer

http://base-win2k8x64:81/sites/F Search

SharePoint System Account

BROWSE PAGE PUBLISH SHARE FOLLOW EDIT

focus CORPORATION

Welcome to The Contracts Processing Site Inbox EDIT LINKS

Search this site

Home Documents Recent Service Contracts Contracts Site Contents Inbox EDIT LINKS

Checked out to you Only you can see your recent changes. [Check it in.](#)

Search (IBM Content Navigator)

IBM FileNet and Conne

New Search

Name contains

- Recent Searches
- All Searches
 - All Deals
 - All policies and procedu
 - AllProjectDocumentsApp
 - Compare Invoices
 - EmployeeRatings
 - HR Documents
 - New Ad Copy
 - Policy Template Search
 - Published Policies
 - SearchFolderName
 - SearchforProjectFolderB
 - SharePoint Contracts inf
 - SharePoint and FCM Cor

New Search x

Search Criteria

Search Results

Refresh Add Document Actions

Showing results for: New Search

	Name	Size	Modified By	Modi
	Requesting a new Project.doc	44 KB	Dan	9/23,

Using Web Parts

Work – Work is added

The screenshot shows a Windows Internet Explorer browser window displaying a SharePoint site. The address bar shows the URL `http://base-win2k8x64:81/sites/F`. The page title is "Work". The navigation bar includes "BROWSE", "PAGE", and "PUBLISH" options, along with a "System Account" dropdown and utility icons for home, star, and settings. A secondary navigation bar contains "SHARE", "FOLLOW", "EDIT", and a search box labeled "Search this site".

The main content area features a "focus CORPORATION" logo and a "Welcome to The Contracts Processing Site" message. A yellow warning banner states: "Checked out to you Only you can see your recent changes. [Check it in.](#)". Below this, the "Work (IBM Content Navigator)" web part is displayed, showing a dropdown menu for "IBM FileNet and Conne" and a "Preferences" section with expandable items: "Group_B_Reviewers", "EAS", and "SDLC".

Using Web Parts

Work – My Work Items

The screenshot shows a SharePoint web browser interface. The browser title is "Work - Windows Internet Explorer" and the address bar shows "http://base-win2k8x64:81/sites/F". The page header includes "SharePoint" and "System Account". The main content area is titled "Work (IBM Content Navigator)" and displays a list of "My Work Items" under the "SDLC" category. A yellow banner at the top of the content area reads "Checked out to you Only you can see your recent changes. Check it in." The left sidebar contains navigation links for "Home", "Documents", "Recent", "Service Contracts", "Contracts", "Site Contents", and "Inbox". The "My Work Items" table has columns for "Subject", "Created", and "Overdue".

Home Documents Recent Service Contracts Contracts Site Contents Inbox

EDIT LINKS

Checked out to you Only you can see your recent changes. [Check it in.](#)

Work (IBM Content Navigator)

IBM FileNet and Conne

Preferences

- Group_B_Reviewers
- EAS
- SDLC
 - Executive
 - Operations
 - Supervisor
 - My Work Items**

Executive Operations Supervisor **My Work Items**

Refresh Open | Actions

DefaultApplication SDLC My Work Items

Subject	Created	Overdue
Review for Requesting a new Project.doc	9/23/2014, 7:47 AM	In Process
Review for Atlanta TEC Invoice1.doc	9/22/2014, 9:06 AM	In Process
Review for Atlanta TEC Invoice1.doc	9/15/2014, 10:54 AM	In Process
Review for Atlanta TEC Invoice1.doc	9/15/2014, 9:57 AM	In Process
Review for Really Clean 2010 Contract Agreement.doc	9/9/2014, 10:38 AM	In Process
Review for CDC ISO SOP template.doc	4/30/2014, 9:21 AM	Overdue
Review for 2013 GrassIsGreener Annual Contract.doc	3/5/2014, 11:26 AM	In Process

Using Web Parts

Work – Acting on work

Work - Windows Internet Explorer

http://base-win2k8x64:81/sites/F Work

SharePoint System Account

https://base-win2k8x64.ecmdemo.ibm.com/?queueName=Inbox&wobNum=7284113E72BF1141B7F0572EBACA0776 - Windows Internet Explorer

Review for Requesting a new Project.doc

Due date: 9/25/2014, 11:59 PM | Started by: dan | Received on: 9/23/2014, 7:47 AM | Step: Review

This is pretty cool!

[Hide Instructions](#)

[Properties](#) [Attachments](#) [History](#)

[Refresh](#) | [Add Document](#) | [Add Folder](#) | [Remove](#) | [Actions](#)

Attachments ▶ Document for review

Name	Size	Modified By	Modified On	Major Version
Requesting a new Project.doc	44 KB	Dan Misawa	9/23/2014, 7:40 AM	1

Get next work item

[Reject](#) [Approve](#) | [Save](#) [Cancel](#)

100%

Copy to SharePoint from Content Navigator

Add to SharePoint

The screenshot shows a Windows Internet Explorer browser window displaying a SharePoint site. The address bar shows the URL `http://base-win2k8x64:81/sites/F`. The page title is "Welcome to The Contracts Processing Site". The left sidebar contains navigation links: Home, Documents, Recent, Service Contracts, Contracts, Site Contents, and Inbox. The main content area is titled "Browse (IBM Content Navigator)" and shows a table of documents. A context menu is open over a document, with the option "Add to Microsoft SharePoint" highlighted.

SharePoint

System Account

BROWSE PAGE

SHARE FOLLOW SYNC EDIT

Welcome to The Contracts Processing Site

Home Documents Recent Service Contracts Contracts Site Contents Inbox

EDIT LINKS

Welcome to The Contracts Processing Site

Search this site

Browse (IBM Content Navigator)

Refresh Add Document New Folder Actions

Root IT

Name	Size	Modified By	Modified On	Major Version
Preview	44 KB	Dan	9/23/2014, 7:40 AM	1

- Preview
- Properties
- View Child Documents
- Download
- Export
- Delete
- Check Out
- Check In
- Cancel Check Out
- Link
- Send Email
- Version
- Folders
- Print
- Workflow
- Add to Microsoft SharePoint**

Copy to SharePoint from Content Navigator

Select Contracts

The screenshot shows a web browser window displaying a SharePoint site titled "Welcome to The Contracts Processing Site". The browser's address bar shows the URL "http://base-win2k8x64:81/sites/F". The SharePoint interface includes a top navigation bar with "System Account" and a search bar. The main content area is titled "Browse (IBM Content Navigator)" and shows a "General" section with a "Save in:" dropdown menu. A file selection dialog box is open, showing a tree view of folders under "Connection to SharePoint Contracts". The "Contracts" folder is selected. The dialog box has "OK" and "Cancel" buttons. On the right side of the screen, a dark overlay titled "Add to Microsoft SharePoint" is visible, with the text "The values that you enter for the document properties can be used to find the document later." and "Add" and "Cancel" buttons.

SharePoint

System Account

BROWSE PAGE

SHARE FOLLOW SYNC EDIT

Welcome to The Contracts Processing Site - Home - Windows Internet Explorer

http://base-win2k8x64:81/sites/F

Welcome to The Contracts P...

Home Documents Recent Service Contracts Contracts Site Contents Inbox EDIT LINKS

Search this site

Welcome to The Contracts Processing Site

Browse (IBM Content Navigator)

General

Save in:

Connection to SharePoint Contracts

- Contracts
- Documents
- Service Contracts
- Site Assets
- Site Collection Documents
- Style Library

OK Cancel

Add to Microsoft SharePoint

The values that you enter for the document properties can be used to find the document later.

Add Cancel

Copy to SharePoint from Content Navigator

Add the doc

Windows Internet Explorer

SharePoint

System Account

BROWSE PAGE

SHARE FOLLOW SYNC EDIT

focus CORPORATION

Welcome to The Contracts Processing Site

Inbox EDIT LINKS

Search this site

Welcome to The Contracts Processing Site

Browse (IBM Content Navigator)

General

* Save in: **Contracts**

Overwrite existing files

Properties

Content Type: Document

Title: ?

Add to Microsoft SharePoint

The values that you enter for the document properties can be used to find the document later.

Add

Cancel

Copy to SharePoint from Content Navigator

The document is now in SharePoint



The screenshot shows a Windows Internet Explorer browser window displaying a SharePoint site. The address bar shows the URL `http://base-win2k8x64:81/sites/F`. The page title is "Contracts - All Documents". The SharePoint interface includes a navigation sidebar on the left with links for Home, Documents, Recent, Service Contracts, Contracts (highlighted), Site Contents, and Inbox. The main content area features a "Welcome to The Contracts Processing Site" message, a search box, and a "new document or drag files here" prompt. Below this is a table of documents:

✓	Name	Modified	Modified By
	Atec - Partner Agreement - 2012	January 09	<input type="checkbox"/> System Account
	Really Clean 2010 Contract Agreement	September 09	<input type="checkbox"/> System Account
	Requesting a new Project ✱	A few seconds ago	<input type="checkbox"/> Dan Misawa

Use SharePoint as Source in Content Navigator

View documents

The screenshot shows a web browser window with a single tab titled "Copy Review". The browser's address bar and navigation buttons are visible. The main content area displays a SharePoint interface for a document library named "SharePoint 2013 Contracts". The interface includes a left-hand navigation pane with a home icon and a search icon. The main area features a toolbar with "Refresh", "Add Document", "New Folder", and "Actions" buttons. Below the toolbar is a table listing documents in the library.

Name	Modified	Author	Class
 Atec - Partner Agreement - 2012.doc	1/9/2014, 3:15 AM	System Account	Document
 Really Clean 2010 Contract Agreement.doc	9/9/2014, 2:49 PM	System Account	Document

Use SharePoint as Source in Content Navigator

Preview

The screenshot shows a web browser window with the address bar displaying 'Copy Review'. The page content is a SharePoint library view for 'SharePoint 2013 Contracts'. The interface includes a top navigation bar with 'Refresh', 'Add Document', 'New Folder', and 'Actions' buttons. A left sidebar contains navigation icons. The main content area lists two documents:

- Atec - Partner Agreement - 2012.doc**
Name: Atec - Partner Agreement - 2012.doc | Modified: 1/9/2014, 3:15 AM
| Author: System Account | Title: Atec - Partner Agreement - 2012
- Really Clean 2010 Contract Agreement.doc**
Name: Really Clean 2010 Contract Agreement.doc |
Modified: 9/9/2014, 2:49 PM | Author: System Account |
Title: Copied from ICN

The first document is selected, and its preview is shown on the right. Below the preview, the 'Properties' and 'System Properties' sections are visible:

Properties

Class:	Document
Name:	Atec - Partner Agreement - 2012.doc
Title:	Atec - Partner Agreement - 2012

System Properties

Author:	System Account
Created:	12/17/2013, 9:58 AM
Modified:	1/9/2014, 3:15 AM
cmis:isVersionSeriesC	False

Use SharePoint as Source in Content Navigator

Act on documents

Firefox

Copy Review

Copy Review

SharePoint 2013 Contr

SharePoint 2013 Contracts

Refresh Add Document New Folder Actions

SharePoint 2013 Contracts

Name	Modified	Author	Class
...	1/9/2014, 3:15 AM	System Account	Document
...	9/9/2014, 2:49 PM	System Account	Document

- Open
- Preview
- Properties
- Download
- Add to Favorites
- Export
- Delete
- Check Out
- Check In
- Cancel Check Out
- Link
- Add to Microsoft SharePoint
- Send Email
- Send to IBM QuickFile
- Folders
- Print

Content Navigator - Cross-Repository Search

Adding Repositories

The screenshot shows the 'New Cross-Repository Search' configuration page in the Content Navigator. The interface includes a sidebar with search filters, a main configuration area with a table of repositories, and a mapping table at the bottom.

Search Scope Configuration:

Repository	Search Scope	Class	Object Type and Version
IBM FileNet and Connections	Entire Repository	Document (Including subclasses)	Documents, Released version
SharePoint 2013 Contracts	Entire Repository	cmis:document	Documents, Current version

Mapping Table:

Mapping Name	Type	Repositories
No items to display		

Footer: 9/9/2014, 5:51 PM - 1 items were found.

Content Navigator - Cross-Repository Search

Adding Mapping

Firefox Copy Review

https://base-win2k8x64.ecmdemo.ibm.com/navigator/?desktop=CopyReview

Copy Review p8admin IBM

New Search

Name contains

Recent Searches

- SharePoint and ECM C
- SharePoint Contracts i
- All Deals
- EmployeeRatings
- Compare Invoices
- All policies and proced
- AllProjectDocumentsA
- SearchFolderName
- New Ad Copy
- HR Documents

All Searches

SharePoint and ECM Contracts

Search Scope

Add Repository Edit Repository Remove

Repository	Search Scope	Class	Object Type and Version
SharePoint 2013 Contracts	Entire Repository	Document	Documents, Current version
IBM FileNet and Connections	Entire Repository	Document (Including subclasses)	Documents, Released version

Add Mapping Edit Delete

Mapping Name	Type	Repositories
Author	Text string	SharePoint 2013 Contracts, IBM FileNet and Connections
Created	Date	SharePoint 2013 Contracts, IBM FileNet and Connections
Editor	Text string	SharePoint 2013 Contracts, IBM FileNet and Connections
Modified	Date	SharePoint 2013 Contracts, IBM FileNet and Connections
Name	Text string	SharePoint 2013 Contracts, IBM FileNet and Connections
Title	Text string	SharePoint 2013 Contracts

Search

9/10/2014, 8:26 AM - The selected document was checked out.

Content Navigator - Cross-Repository Search

Result Set

Firefox Copy Review
https://base-win2k8x64.ecmdemo.ibm.com/navigator/?desktop=CopyReview

Copy Review p8admin IBM

New Search
Name contains

Recent Searches

- SharePoint and ECM C
- SharePoint Contracts i
- All Deals
- EmployeeRatings
- Compare Invoices
- All policies and proced
- AllProjectDocumentsA
- SearchFolderName
- New Ad Copy
- HR Documents

All Searches

SharePoint and ECM Contracts x

Search Scope

Search

Search Criteria

Search Results

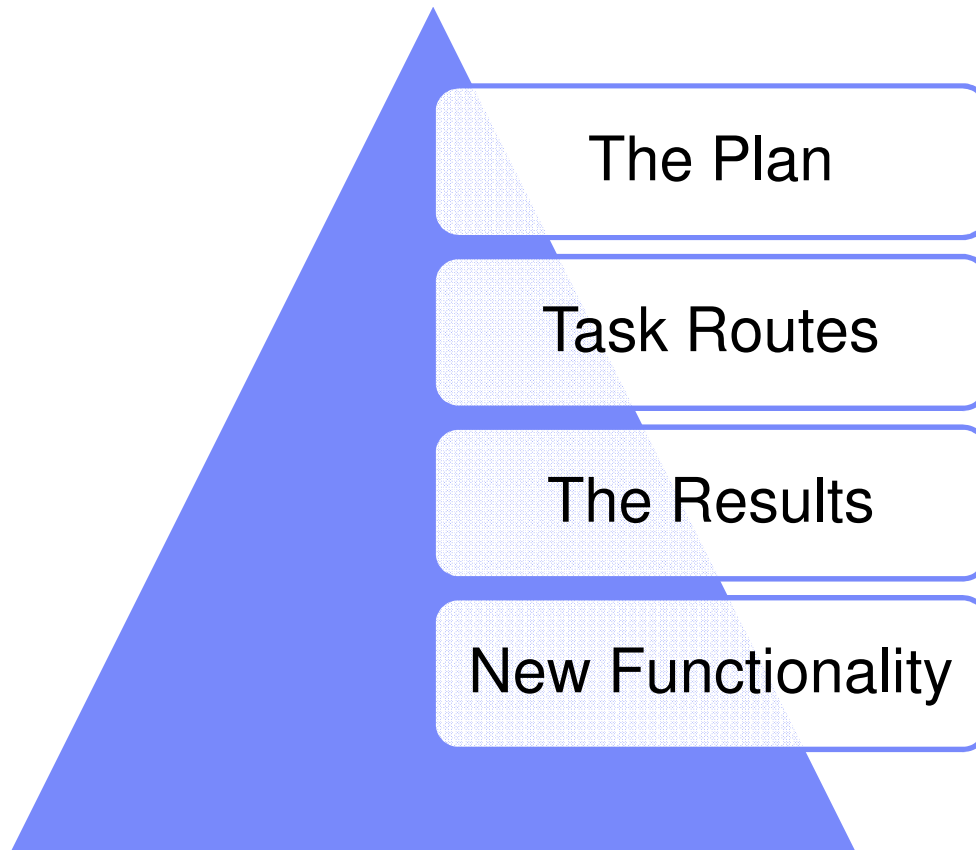
Refresh Add Document Actions

Showing results for: SharePoint and ECM Contracts

	Created	Author	Editor	Modified	Name	Title
	12/17/2013, 12:58 PM	System Account	System Account	1/9/2014, 6:15 AM	Atec - Partner Agreement - 2012.doc	Atec - Partner Agreement - 2012
	9/9/2014, 5:49 PM	System Account	System Account	9/9/2014, 5:49 PM	Really Clean 2010 Contract Agreement.doc	Copied from ICN
	9/3/2013, 1:04 PM	p8admin	p8admin	9/3/2013, 1:04 PM	Brian G Catering.pdf	
	9/3/2013, 1:06 PM	p8admin	p8admin	9/3/2013, 1:06 PM	Toppings Central 2013 Contract.pdf	
	9/10/2013, 9:30 AM	p8admin	p8admin	9/10/2013, 9:30 AM	MandAApprovalWorkflow	
	9/12/2013, 9:53 AM	p8admin	p8admin	9/12/2013, 9:53 AM	HR Documents	
	10/21/2013, 10:48 AM	p8admin	p8admin	10/21/2013, 10:48 AM	ENUS601-034.pdf	
	9/13/2013, 10:37 AM	p8admin	p8admin	9/13/2013, 10:37 AM	New Employee Letter.doc	
	9/13/2013, 10:55 AM	p8admin	p8admin	9/13/2013, 10:55 AM	John Eastman Employee Letter.doc	

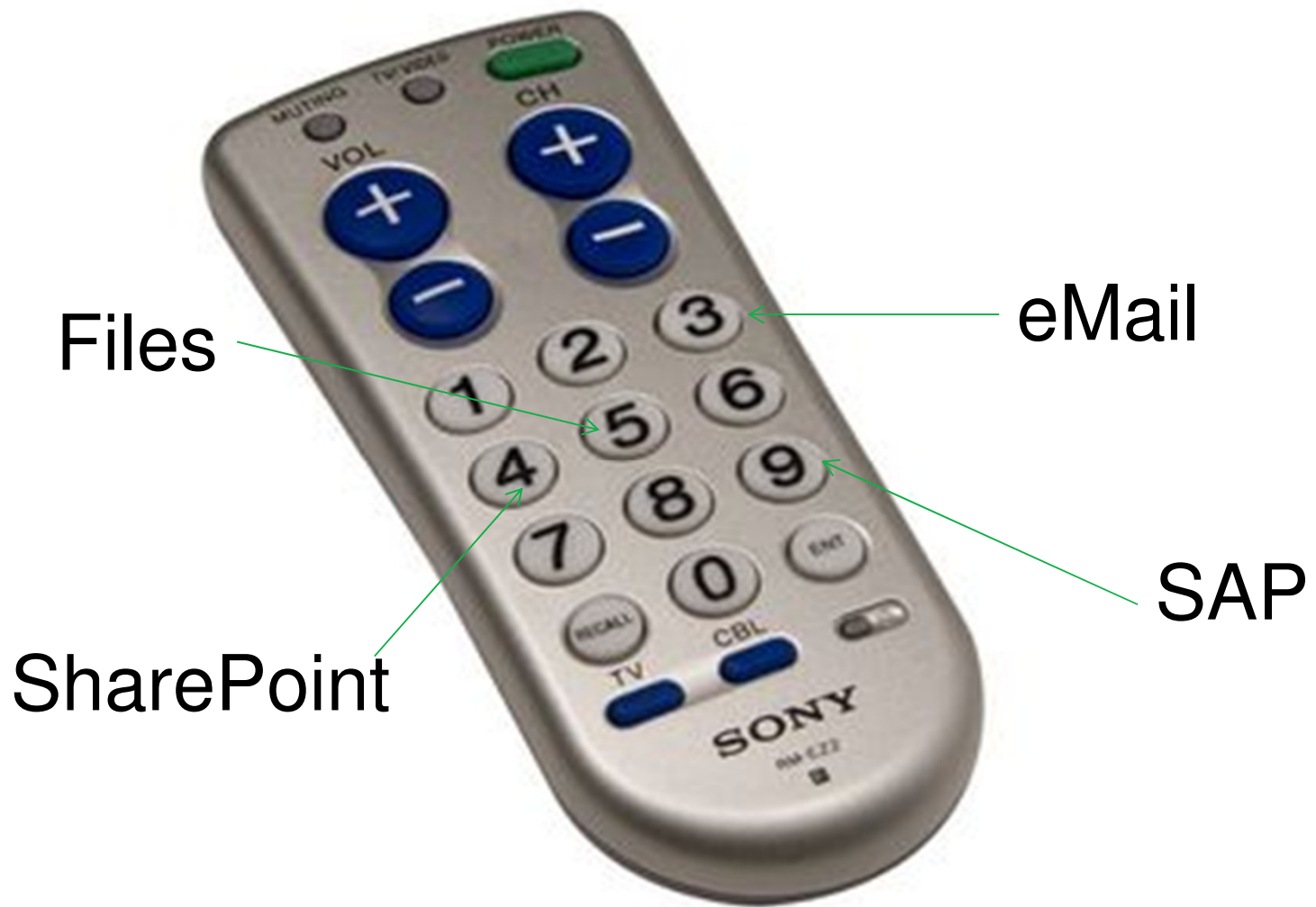
9/10/2014, 8:27 AM - The search returned 83 items.

ICC for SharePoint demo



ICC for SharePoint





Resources

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



Thank you and Questions?

Susan Noonan

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ICC Architecture

