IBM Enterprise Content Management Platform

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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
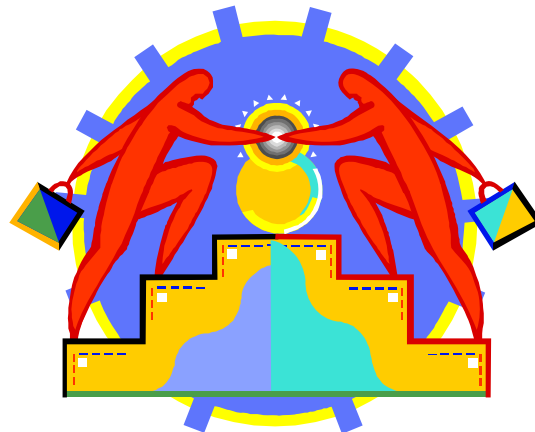
Use Cases for Integrated BCS/ECM

- 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

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:
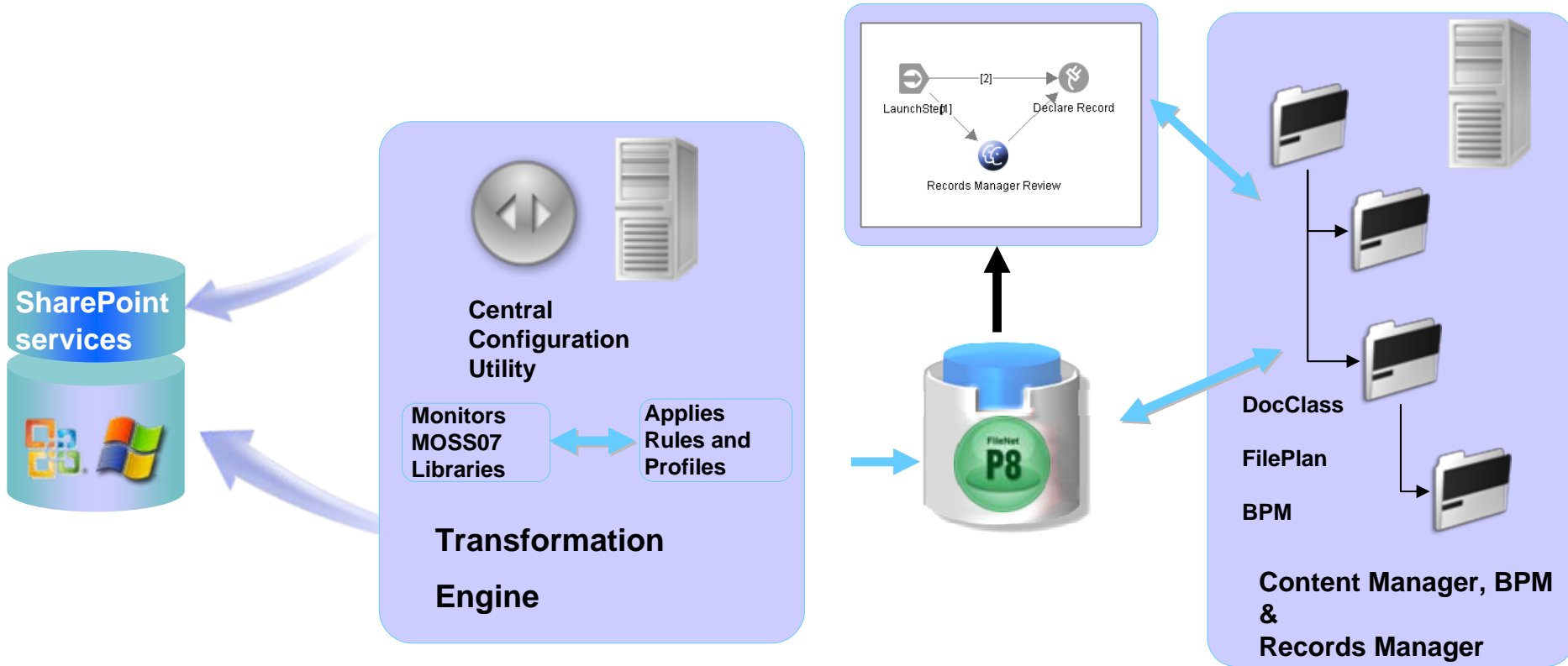- WSS 3.0, MOSS 2007, SharePoint 2010
- IBM FileNet P8 4.x, 5.x
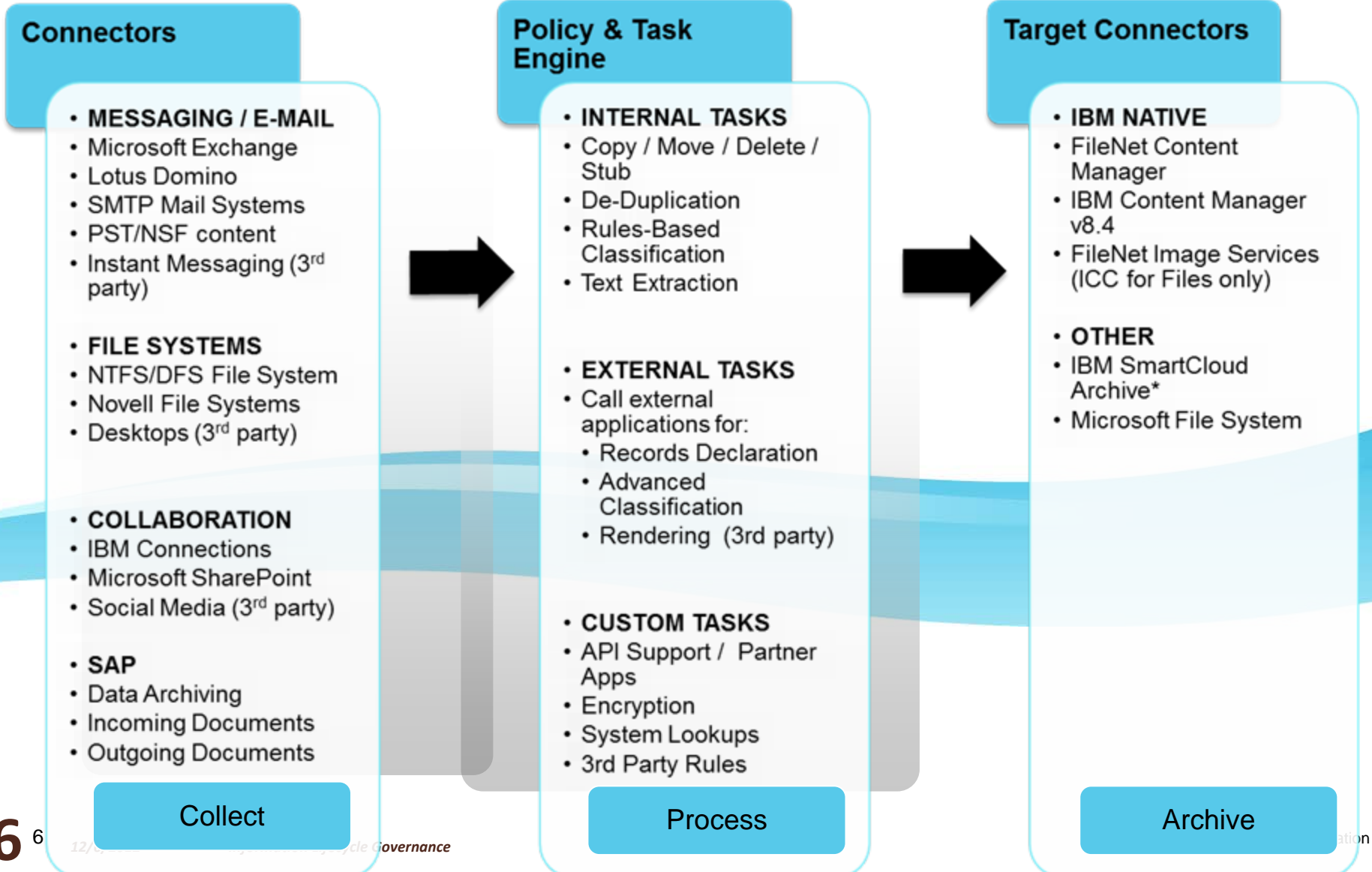
SharePoint

© 20__ ___oration

SharePoint Integration

Delivering ECM to all Information Workers

SharePoint services

Central Configuration Utility

Monitors MOSS07 Libraries ⟷ Applies Rules and Profiles

Transformation Engine

LaunchStep[1] [2] Declare Record

Records Manager Review

FileNet P8

DocClass

FilePlan

BPM

Content Manager, BPM & Records Manager

- Deliver information that is unified, accurate and in context with critical business processes and policy management.

- Manage risk with automated compliance, records management and legal discovery, and control security, access and authorization.

Collect, Process and Archive
Across multiple sources and targets

IBM

Connectors

- **MESSAGING / E-MAIL**
- Microsoft Exchange
- Lotus Domino
- SMTP Mail Systems
- PST/NSF content
- Instant Messaging (3rd party)

- **FILE SYSTEMS**
- NTFS/DFS File System
- Novell File Systems
- Desktops (3rd party)

- **COLLABORATION**
- IBM Connections
- Microsoft SharePoint
- Social Media (3rd party)

- **SAP**
- Data Archiving
- Incoming Documents
- Outgoing Documents

Policy & Task Engine

- **INTERNAL TASKS**
- Copy / Move / Delete / Stub
- De-Duplication
- Rules-Based Classification
- Text Extraction

- **EXTERNAL TASKS**
- Call external applications for:
  - Records Declaration
  - Advanced Classification
  - Rendering (3rd party)

- **CUSTOM TASKS**
- API Support / Partner Apps
- Encryption
- System Lookups
- 3rd Party Rules

Target Connectors

- **IBM NATIVE**
- FileNet Content Manager
- IBM Content Manager v8.4
- FileNet Image Services (ICC for Files only)

- **OTHER**
- IBM SmartCloud Archive*
- Microsoft File System

Collect

Process

Archive

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What's new for SharePoint in ICC 3.0?

- Collection levels and depth
- Library or list type filtering
- User filtering
- Column support enhancement
- Icon Mirroring
- Re-collection enhancements
  - No additional SP Connector required
  - re-collection is enabled automatically during the installation process
  - Restore from link

IBM Content Collector for Microsoft SharePoint

Identify and collect content from Microsoft SharePoint for compliance, storage management and long term retention of valuable content

Supports all list and library types

Enterprise wiki page library, Asset Library, Record Library…

Announcement, Contacts, Project Tasks, Discussion Boards, Surveys….

Define collection at multiple levels & determine depth

Farm, Web Application, Site Collection, Sub-site
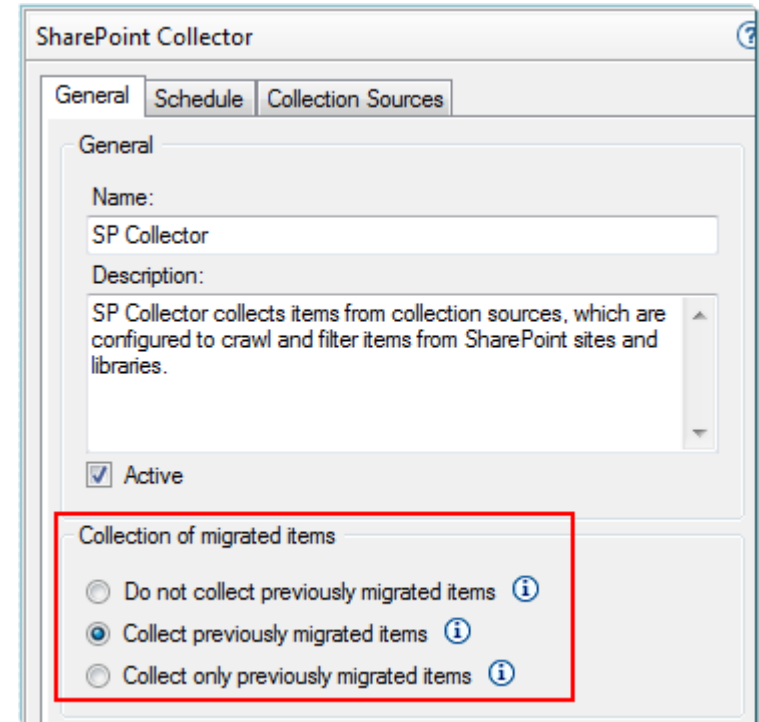
Configuration options available for archiving and re-collection of restored items

Cleanup links in SharePoint when content deleted from the repository

SharePoint Collector

General | Schedule | Collection Sources

General

Name:
SP Collector

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

☑ Active

Collection of migrated items
○ Do not collect previously migrated items ⓘ
◉ Collect previously migrated items ⓘ
○ Collect only previously migrated items ⓘ

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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

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

"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*

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.

Demo

Resources

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

Questions?

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