



IBM ECM UK UserGroup 2008

Connecting the ECM Community



IBM FileNet Connectors for Microsoft SharePoint

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Agenda

- **Microsoft SharePoint and Lotus Quickr are defined by analysts as “Basic Content Services” (BCS)**
 - What is BCS?
 - Why integrate BCS with ECM?
- **Introduction to IBM FileNet Connector for SharePoint**
- **Quick demonstration**
- **Your Questions**

Basic Content Services (BCS) Defined

Basic Content Services: Will Be a Common Element of the Future Workplace

Basic content services (BCS): Basic document library services, imaging, document collaboration, document routing and Web publishing capabilities. Priced for mass deployment.



The mass adoption of BCS represents a significant technical and market discontinuity.

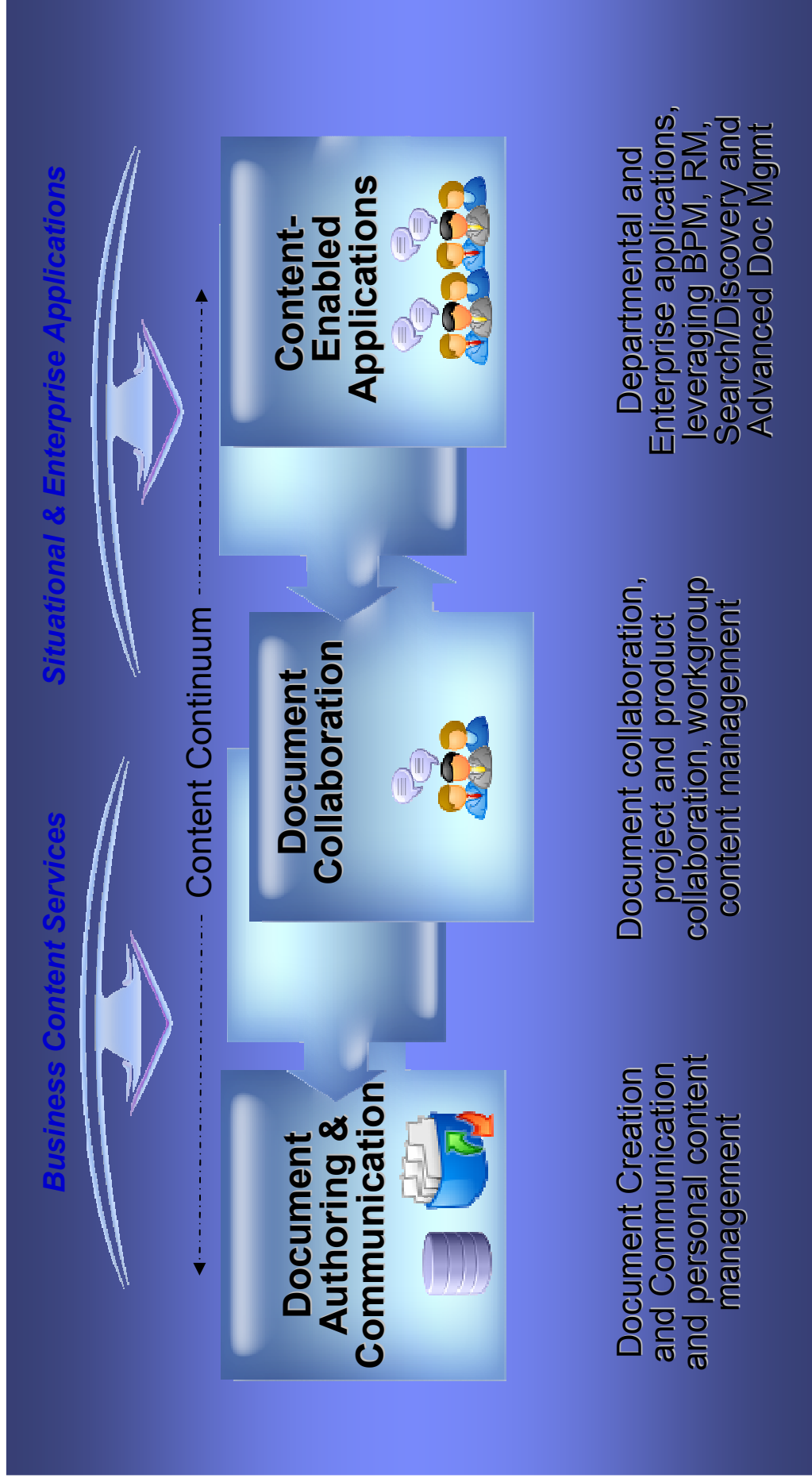
Action Item: Prepare now for BCS in your strategy.

Gartner

BCS Definition continued ...

- What are Basic Content Services?
Research analysts at Gartner describe BCS as "systems designed to handle the growing demand for scalable, 'good enough' content infrastructures that offers basic document management and Web publishing or other content management capabilities at a price that enables mass deployment." Gartner predicts that BCS will become a "birthright" collaborative tool within the majority of enterprise organizations over the next three years.
- Despite being championed as "the everyday knowledge worker's content collaboration tool", Gartner does not expect BCS to replace ECM applications, but instead cooperate and integrate with them by leveraging open-standards based technology.

Convergence of the Content Continuum



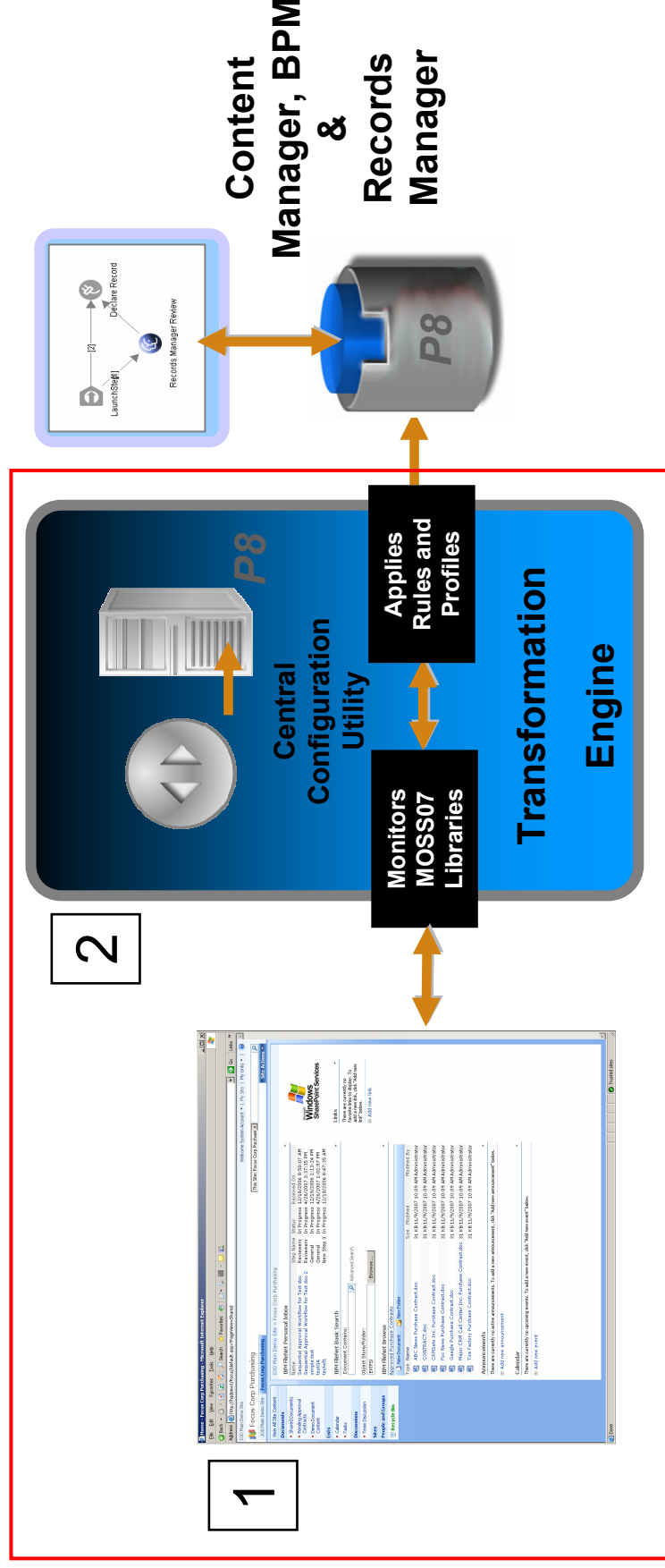
BCS and ECM – Why Integrate

- **BCS (Lotus Quickr & SharePoint)**
 - Enhanced team productivity through collaboration
 - Consistent user experience
 - Reduced training costs
 - Easier access and discovery
- **ECM**
 - Discipline and controls (e.g. retention and compliance)
 - Business process management
 - Central management (e.g. archival and backup)
 - Scalability



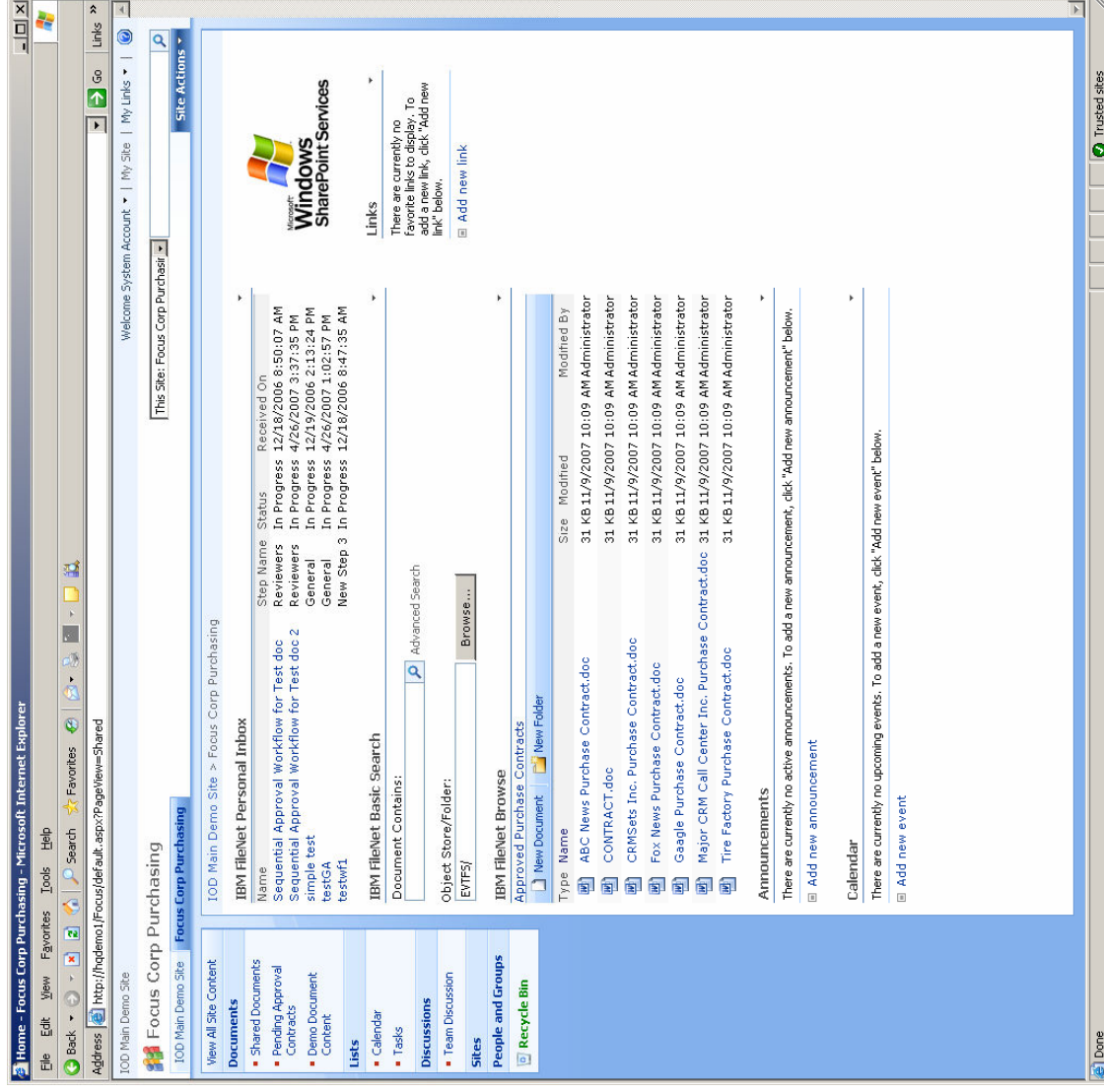
Introduction to IBM FileNet Connectors for SharePoint (V2.2)

- **Divided into 2 parts:**
 1. User Experience (Web Parts)
 2. Document Libraries connector (Rules engine)



1. User Experience Integration

- Host ECM applications with BCS user experience
- Search, browse, view, check-in, check-out, delete, inbox functions
- Attractive UI platform for ECM applications



2. Document Libraries connector

- **BCS-created content is moved or copied into, and managed by, ECM repository**
- **Further access to content via ECM or SharePoint applications**
- **Builds on user-experience integration**
 - Single version of truth, in system of record
 - Enables secure compliance, BPM, reuse, scalability



Quick demonstration – Documents in SharePoint

The screenshot shows a Microsoft Internet Explorer browser window displaying a SharePoint site. The address bar shows the URL: `http://hqdemo1/Contracts/Purchase%20Contracts/Forms/Purchase%20Contracts.aspx`. The page title is "Purchase Contracts" under the "Contract Processing" site. The breadcrumb trail is "Team Site > Contract Processing > Purchase Contracts".

The main content area displays a list of purchase contracts with the following columns: Type, Name, Vendor_SP, Cost_SP, Agent_SP, and Date Submitted_SP. The list contains four items, each marked as "NEW":

Type	Name	Vendor_SP	Cost_SP	Agent_SP	Date Submitted_SP
ABC News - Purchase Contract	ABC News - Purchase Contract				
Call Center news and screen equip purchase contract	Call Center news and screen equip purchase contract	Focus Corp	\$28	Mary Smith	10/5/2007
Call Center Office Equipment Purchase Contract	Call Center Office Equipment Purchase Contract	Focus Corp	\$3000	Mary Smith	10/9/2007
CRMsets Inc. Purchase Contract	CRMsets Inc. Purchase Contract	CRM Sets Inc.	\$77,000	Mary Smith	10/5/2007

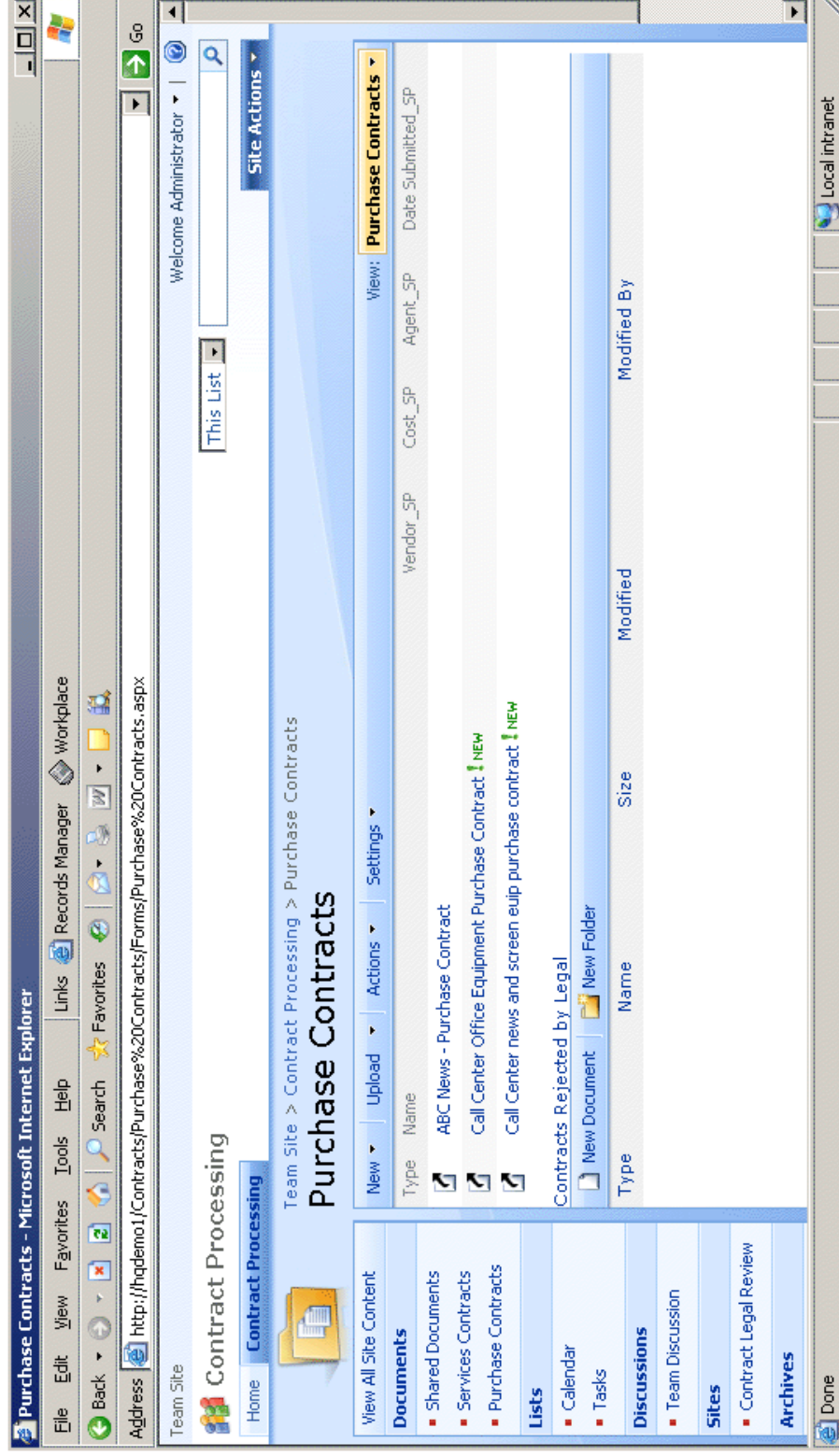
Below the list, there is a section for "Contracts Rejected by Legal" with a "New Document" button and a "New Folder" button. The left sidebar contains navigation links for Documents, Lists, Discussions, Sites, and Archives.

Quick demonstration – Rules applied in the background

The screenshot displays the UFI Configuration Manager interface. The main window shows a task route diagram for 'Purchase Contracts'. The diagram is divided into two main sections: '1. Internal Contracts' and '2. External Contracts'. The 'Internal Contracts' path starts with 'Store Internal Contract', followed by 'P8 4.x Modify Document Security', and 'File Internal Contract to Folder', which leads to 'Create Link in SharePoint'. The 'External Contracts' path starts with 'Get Versions', followed by 'Store External Contract (process launched)', and 'File External Contract', which leads to 'Delete from SharePoint'. Both paths converge at a final merge point. The right-hand pane shows the 'General' tab for the task route, with fields for Name ('Purchase Contracts') and Description. Below these are checkboxes for 'Include audit log task' and a list of 'Collectors' including 'SharePoint Connector', 'SharePoint Collector Purchase Contracts', 'Shared Legal Documents', and 'SharePoint Collector Service Contracts'.



Quick demonstration – Result of rules shown in SharePoint





Quick demonstration – Contract ready for legal review

Home - Contract Legal Review - Microsoft Internet Explorer

Address: http://hqdemo1/Contracts/LegalReview/default.aspx

Documents

- Lists**
 - Calendar
- Discussions**
 - Team Discussion
 - Contract Review discussion
- Sites**
 - People and Groups
 - Recycle Bin

Public Inboxes > Legal

Name	Step Name	Status	Received On
Contract Approval - Legal Review	Legal review	In Progress	9/8/2008 10:01:44 AM

Contracts in PG Pending Legal Review

Type	Name	Size	Modified By
Document	CRMSets Inc. Purchase Contract.doc	35 KB	9/8/2008 10:01 AM

Legal Documentation

Type	Name	Modified By
Document	COM221-Contract-for-services-by-self-employed-person	Administrator
Document	PTN001-Partnership-agreement	Administrator

Members

Groups

- Contract Legal Review Owners
- Legal
- Add new user

Contract Review discussion board

Subject: Contractor's obligation discussion



Quick demonstration – Legal reject the contract

Workplace: Step Approval – Microsoft Internet Explorer

Approver:	
Cost:	\$77,000
DateApproved:	7/16/08 12:44 PM <input type="button" value="Clear (MM/d/yy h:mm a)"/>
DateSubmitted:	10/5/07 12:00 AM <input type="button" value="Clear (MM/d/yy h:mm a)"/>
Department:	Purchasing
Vendor:	CRM Sets Inc.

Attachments:

Contract

* Responses:

Comments: Incorrect terms are included within this contract, I have included comments on page 4.

Summary:
Launched by: *Administrator*
Launched on: *9/8/08 10:01 AM*
Received on: *9/8/08 10:01 AM*

Done Local intranet



Quick demonstration – Rejected contract visible again

The screenshot shows a web browser window displaying a 'Purchase Contracts' application. The browser's address bar shows the URL: `http://hdemo1/Contracts/Purchase%20Contracts/Forms/Purchase%20Contracts.aspx`. The application header includes 'Contract Processing' and 'Purchase Contracts'. A navigation menu at the top contains 'New', 'Upload', 'Actions', 'Settings', and 'View: Purchase Contracts'. Below the header, there is a list of contracts with columns for 'Type', 'Name', 'Vendor_SP', 'Cost_SP', 'Agent_SP', and 'Date Submitted_SP'. The list includes three entries: 'ABC News - Purchase Contract', 'Call Center Office Equipment Purchase Contract', and 'Call Center news and screen eup purchase contract'. The third entry is marked with a green 'NEW' icon. Below the list, there is a section titled 'Contracts Rejected by Legal' with a 'New Folder' button. A table below this section shows a single entry: 'CRMSets Inc. Purchase Contract.doc' with a size of '35 KB' and a modification date of '9/8/2008 10:01 AM'. On the left side of the application, there is a 'View All Site Content' section with sub-sections for 'Documents', 'Lists', 'Discussions', 'Sites', and 'Archives', each containing a list of items.

Summary

- **Basic Content Services are being seen by analysts as an important piece of document collaboration and the ECM user experience.**
- **IBM has made significant investment in this space and offers integration technology to bridge the gap between BCS and ECM environments**

IBM Connector for SharePoint Home

<http://www-01.ibm.com/software/data/content-management/filenet-connector-sharepoint/>

IBM Quickr Home Page

<http://www-01.ibm.com/software/lotus/products/quickr/>





Your Questions