

IBM FileNet Portlets for WebSphere Portal

Presented by:



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1 FileNet Portlet(s) Solution Overview

The FileNet Solution presented by Streebo consists of a set of standard portlets for WebSphere Portal that readily integrates with FileNet Server. These assets are JSR 168/286 compliant and further run on all versions of WebSphere Portal 6.x. They use the Web-Services integration approach and hence require FileNet version 4.x. These portlets can be customized to use the EJB protocol and Java API integration as well. They have been designed to be easily extensible. Further, these portlets readily integrate both with the Content Engine and the Process Server and surface the following services:

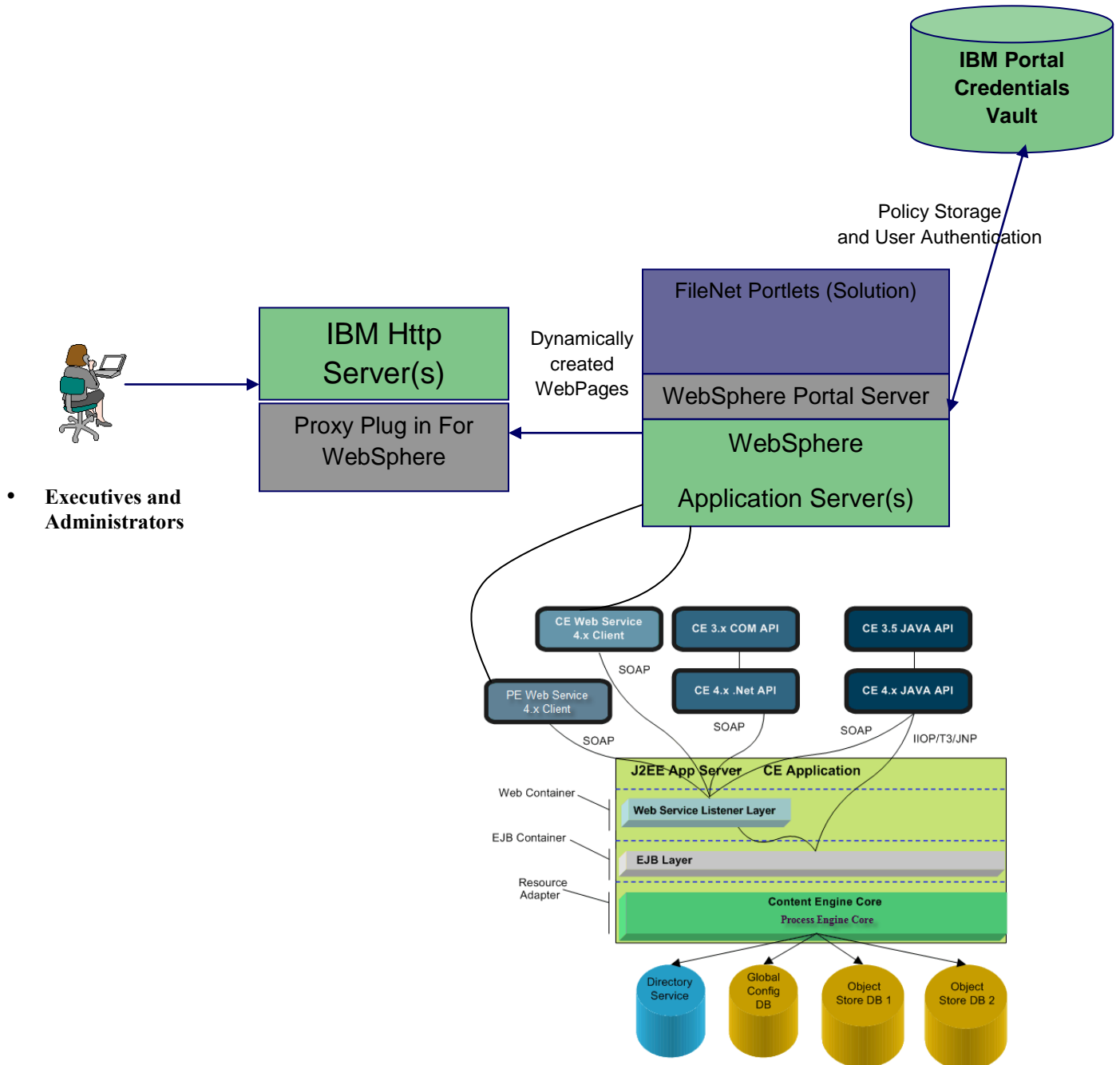
- Generic Inbox/Queue portlet
- Active workflow portlet
- Folder view portlet
- Search Documents portlet
- FileNet Document Management Portlets (Support for Check-in, Check-out, Upload, Update and Delete documents right from the Portal)

Single-Sign-On (SSO) with FileNet is supported using IBM's credential Vault.

These portlets were built using IBM's standard automated tooling to create Portlets (Portlet Factory) and were developed in-line with IBM Best Practices. They are currently deployed and live (in Production) at various customer locations. The solution package includes the portlet war(s), actual source code of each of the portlets and knowledge transfer sessions to ensure that your team can take over the ongoing customization or enhancement (if any)

2 Logical Architectural Layout

The diagram below depicts the overall layout (logical) and interaction of the Portal server with IBM FileNet Server. As depicted below the Portal readily integrates with FileNet server using the Web-Services integration approach. FileNet credentials for the individual user are stored in the Credential vault thus giving an SSO experience upon subsequent logins.



3 Solution Description

The solution consists of a set of standard portlets that readily integrate with FileNet server and run on the WebSphere Portal platform. Brief Description of each of the portlets and services are listed below:

Generic Inbox/Queue set of portlet(s) calls FileNet process engine web services and display the Inbox or Queue from FileNet server to the login user.

The generic Inbox/Queue portlet allows admin to configure Queue entries and manage their attributes, Processor type, Number of entries per page, Server URL and WSDL URL for development, testing and production environment.

Active Workflow portlet calls FileNet process engine web services and display the user's active workflow on the FileNet server.

The Active workflow portlet allow admin to configure number of entries per page, Server URL and WSDL URL for various environments (development, testing, production etc.)

Folder View portlet allow users to see files and folders on the FileNet server by calling FileNet content engine web services. It displays all the files and folder on the basis of logon user id. It also allows user to navigate through the folder.

The Folder view portlet allow admin to configure folder SQL Query for the folder selection, FileNet URL and WSDL URL for various environments

Search Agreement documents portlet calls FileNet content engine web services to search the agreement type document with search criteria and allow user to perform operations to the selected document.

FileNet Document Management Portlet This portlet also allow user to add agreement type document to the folder configured by administrator. The operations for the document are Check-In, Quick Check-In, Checkout, Delete, Cancel Checkout and Delete.

The Administrator can configure various options within the FileNet Document Management Portlet that include items such as display Properties of Add/Update Button and whether to hide or show the Check In File Upload, Quick Check-In Link, Download Link, Check out Link, Delete Link, Check in Link. The document management further allows the admin to configure the WSDL URL and the FileNet URL

Each of these portlets support Single-Sign-On. Further, they have been designed so customers can easily extend this to use the Java API (in lieu of web-services) and/or use the IIOP protocol (in lieu of Http).

4 Solution Visual Overview

My Inbox Portlet

My Inbox_

Inbox

Refresh

Subject	Comment	Received On	Launched On	Launched By
Streebo Active Workflow Test		11/5/09 4:09 PM	11/4/09 10:39 PM	tmguser7
Admin Test Route to any Queue or Inbox		12/3/09 10:32 AM	12/3/09 10:32 AM	tmguser7
Test 2		12/3/09 11:14 AM	12/3/09 11:14 AM	tmguser7

1 2 Next Last

My Inbox on FileNet server

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My Inbox

Filter inbox based on field where:

Name

Apply Filter | Clear

Item #	Item Name	Status	Received On
1	Admin Test Route to any Queue or Inbox	In Progress	12/3/09 12:32 PM
2	Admin Test Route to any Queue or Inbox	In Progress	12/3/09 6:56 PM
3	Test 2	In Progress	12/3/09 6:56 PM
4	Streebo Active Workflow Test	In Progress	11/5/09 6:09 PM
5	Test 2	In Progress	12/3/09 1:14 PM

My Inbox Customizer

Queue names from FileNet

Attributes of Inbox from FileNet

My Inbox_

Select Queue: Inbox

Manage Attrib

Name

NextStep_Part

Email_Subject

Email_Recipients

ProjectAttachme

NextStep

F_Subject

F_Comment

ReceivedOn

LaunchedOn

LaunchedBy

URL

Queue Title: Inbox

Processor Type: step

Number of Entries per Page: 3

Server URL: http://fnetp8dev.tmg.local:9080/Workplace

WSDL URL: http://fnetp8dev.tmg.local

Number of Entries:

OK Cancel

FileNet Server URL for development or production

WSDL URL for Web Services call configuration

My Active Workflow

Active Workflows_

My Active Workflows Refresh

Name	StepName	LaunchedOn
Admin Test Route to any Queue or Inbox	Assign Work	12/3/09 4:06 PM
Test 2	Assign Work	12/3/09 11:14 AM
Streebo Active Workflow Test	Assign Work	11/4/09 10:39 PM
Setup: bills test 1 (New Customer) (dd)	Credit Review	12/3/09 3:24 PM
Admin Test Route to any Queue or Inbox	Assign Work	12/3/09 10:32 AM

1 2 Next Last

Active Workflow Portlet

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My Active Workflows

Items Found: 6

Name	Step Name	Launch Time
Admin Test Route to any Queue or Inbox	Assign Work	12/3/09 6:06 PM
Admin Test Route to any Queue or Inbox	Assign Work	12/3/09 12:32 PM
Sara Test	Assign Work	12/3/09 6:06 PM
Setup: bills test 1 (New Customer) (dd)	Credit Review	12/3/09 5:24 PM
Streebo Active Workflow Test	Assign Work	11/3/09 12:39 AM
Test 2	Assign Work	12/3/09 1:14 PM

My Active Workflow on FileNet server

My Active Workflow Customizer

Active Workflows_

Number of Entries per Page:

Server URL:

WSDL URL:

FileNet WSDL URL for Web Service call

FileNet server URL to choose environment

Generic Folder View Portlet

The screenshot shows the 'Generic Folder View Portlet' interface. It features a 'Folder View' section at the top with a dropdown menu set to 'Public'. Below this, the path is shown as 'Path: TMGOS > Public > StreeboTestFolder'. A list of items is displayed, including 'TI Doc 2', 'Public Document 1', 'Pcard Request v2', 'Public document 2', 'Add Content', 'Launch a Workflow', 'Search for Content', 'StreeboTestFolder', and 'View Reference Documents'. A 'Refresh' button is located next to the folder name 'Public'. The path is also shown as 'Object Stores > Public'. A table below the list shows details for three items:

Title A	Content Size	Modified By	Modified On	Major Version
Public Document 1	1983	plabrin	10/15/09 3:59 PM	1
Public document 2	1423483	plabrin	10/15/09 4:01 PM	1
TI Doc 2	668	plabrin	10/15/09 4:09 PM	1

Callouts point to various features: 'Folder name' points to 'Public'; 'Page Navigation using Breadcrumbs' points to 'Object Stores > Public'; 'Documents and Folders in the Public folder from FileNet server' points to the list of items; 'Document Link to FileNet server' points to the 'TI Doc 2' link; 'Folder Link to its subfolder and documents' points to the 'StreeboTestFolder' link; and 'Folder view on FileNet server' points to the main application window.

Generic Folder View Customizer

The screenshot shows the 'Generic Folder View Customizer' dialog box. It contains three input fields: 'Folder SQL', 'FileNet URI', and 'WSDL URL'. The 'Folder SQL' field contains the query: 'SELECT [id], [Name], [ClassDescription] FROM Folder W'. The 'FileNet URI' field contains: 'http://fnetp8dev.tmg.local:9080/Workplace/'. The 'WSDL URL' field contains: 'http://fnetp8dev.tmg.local:9080/wsi/FNCEWS40DIME/'. There are 'OK' and 'Cancel' buttons at the bottom. Callouts explain: 'FileNet WSDL URL for Web Service call' points to the 'WSDL URL' field; 'SQL statement for the Folders' points to the 'Folder SQL' field; and 'FileNet server URL to choose environment' points to the 'FileNet URI' field.

FileNet Search Center

The screenshot shows the FileNet Search Center interface. At the top, there's a navigation bar with 'Launch a Workflow' and 'Search for Content' options. Below this, there are search filters for 'Public' and 'Object Stores'. A red box highlights the 'Object Stores' section, which includes 'Public Documents', 'IT.Business', 'IT.ESS', 'IT.Business.Search', and 'IT.Business.Search'. A large red arrow points from this section towards the main search view below.

The main search view is titled 'Search View' and shows a search template for 'Public Documents'. It includes various search criteria such as 'Key Words', 'Document Title', 'Business Process', 'IT System', 'Program Name', 'Customer Name IT', 'IT Document Type', 'Added On', and 'Modified By'. A callout box with a blue background and white text says: "Search Center Launched and attributes are available to refine search".

Document Operations on FileNet Search Portlet

The screenshot shows the FileNet Search Center interface with a document operation dialog box open. The dialog box is titled 'FileNet - Add/Update Document' and contains the following information:

- Document Class: Agreement
- Document Title: foo
- Document Type: Amendment
- Customer: Streebo1234
- Contract File#: 12345
- Contract Date: 1/9/2010
- Expiration Date: 1/9/2011

At the bottom of the dialog box, there are several action links: [Check in](#), [Check out](#), [Cancel Check out](#), [Delete](#), and [Download](#). A red box highlights these links. A callout box with a blue background and white text says: "Document Operations on Form Dialog".

On the right side of the screenshot, there is a list of actions available for the document:

- Download
- Check Out
- Cancel Check Out
- Check In
- Quick Check In
- Save Content
- File
- Unfile
- Delete Versions
- Delete
- Delete Content
- Move
- Demote Version
- Launch
- Change Compound
- Publish
- Show Hyperlink

A callout box with a blue background and white text says: "Document Operations on FileNet Server".

Below the dialog box, there is a table with the following columns: 'Document Title', 'Customer Name', 'Created', 'Date Created', and 'Checked Out'. The table contains one row with the following data:

Document Title	Customer Name	Created	Date Created	Checked Out
foo	Streebo1234		10/09/09	

Create Document on FileNet Search Portlet

The image shows a screenshot of the FileNet Search Portlet interface. The main window displays a search results table with one document found. A red circle highlights the 'Properties Add/Update' link in the table. A blue arrow points from this link to a larger 'Add Document' dialog box. This dialog box contains the following fields:

- Document Class: Agreement
- Document Title: [Empty]
- Document Type: Terminating Services Agreement
- Customer: [Empty]
- Contract File#: [Empty]
- Contract Date: [Empty]
- Expiration Date: [Empty]
- File Upload: [Browse...]

Below the dialog box, there is a table with the following data:

Minor Version	Creator	Date Created	Checked Out
0	p8admin	10/09/09	✓

Two callout boxes provide additional information:

- A callout box on the left states: "Form Dialog after click on 'Add Document'" with an arrow pointing to the 'Add Document' dialog.
- A callout box on the right states: "Add Document by Adding document properties and file."
- A callout box at the bottom states: "Add Document window in FileNet Server" with a plus sign (+) next to it.

The bottom-left corner shows a smaller screenshot of the 'Add Document' window in a browser, showing the 'Properties' tab with various fields like 'Document Title', 'Contract Date', and 'Contract Expiration Date'.