

IBM Content Navigator Administration V3.0.6

WF270 (Classroom)

ZF270 (Self-paced)

Course description

This course provides technical professionals with the skills that are needed to configure, customize, and administer the IBM Content Navigator web client for IBM FileNet Content Manager.

The course begins with an introduction to IBM Content Navigator. You learn how to view, add, modify, and search for content in the web client. You learn how to connect to repositories, create new desktops, define cross-repository searches, create teamspace, configure IBM Content Navigator Sync services and Edit services client, define role-based redactions, and build entry templates. You also configure external share to securely share documents with users outside of your organization. You learn how to customize the desktop appearance, modify menus, icons, and labels, create a viewer map, and register a plug-in.

IBM Content Navigator can be used to manage content from different types of repositories such as IBM FileNet Content Manager, IBM Content Manager, IBM Content Manager OnDemand, CMIS, and Box. This course focuses on IBM FileNet Content Manager.

Through instructor-led presentations and hands-on lab exercises, you learn about the core features of IBM Content Navigator.

The lab environment for this course uses Windows Server 2016 Standard Edition.

For information about other related courses, see the IBM Training website:

**ibm.com**/training

General information

Delivery method

Classroom or self-paced virtual classroom (SPVC)

Course level

ERC 1.0

Product and version

IBM Content Navigator V3.0.6

Audience

This course is intended for administrators of IBM Content Navigator.

Learning objectives

After completing this course, you should be able to:

* Identify the capabilities of IBM Content Navigator
* View, add, modify and search for repository content
* Connect to repositories
* Configure an IBM Content Navigator desktop
* Define cross-repository searches
* Create teamspace templates and teamspaces
* Configure role-based desktop administration
* Customize the desktop appearance
* Modify menus, icons, and labels in the client
* Create viewer maps
* Register a plug-in
* Configure entry template management
* Build and manage entry templates to add documents
* Associate entry templates with a folder
* Customize property layouts for entry templates
* Configure and work with role-based redactions
* Configure IBM Navigator Sync services and Sync client
* Work with IBM Content Navigator Edit services
* Configure external share and securely share content with external users

Prerequisites

* Familiarity with content management concepts
* Recommended course or equivalent knowledge: IBM FileNet P8 Platform Essentials (V5.5.x) (F2800G)

Duration

4 days

Skill level

Intermediate

Notes

The following unit and exercise durations are estimates, and might not reflect every class experience. If the course is customized or abbreviated, the duration of unchanged units will probably increase.

This course is an update of the following previous courses:

* IBM Content Navigator 2.0.3.6: Introduction (F270)
* IBM Content Navigator 2.0.3.6: Configuration (F271)
* IBM Content Navigator 2.0.3.6: Sync Services (F273)
* IBM Content Navigator 2.0.3.6: Entry Templates (F274)
* IBM Content Navigator 2.0.3.6: Customize a Desktop (F275)

Course agenda

|  |
| --- |
| Course introduction  Duration: 15 minutes |

|  |  |
| --- | --- |
| Unit 1. Introducing IBM Content Navigator  Duration: 2 hours | |
| Overview | This unit introduces IBM Content Navigator and describes its capabilities. |
| Learning objectives | After completing this unit, you should be able to:   * Identify the capabilities of IBM Content Navigator * Describe the graphic user interface (GUI) elements in IBM Content Navigator * View and search for repository content, add content to repositories, and merge and split documents |

|  |  |
| --- | --- |
| Exercise 1. Working with repository content  Duration: 3 hours and 15 minutes | |
| Overview | In this exercise, you learn how to manage the repository content in IBM Content Navigator. |
| Learning objectives | After completing this exercise, you should be able to:   * View repository content * Add content to a repository * Search for content in a repository * Merge and split documents |

|  |  |
| --- | --- |
| Unit 2. IBM Content Navigator Configuration  Duration: 2 hours | |
| Overview | This unit teaches you how to configure various components for an IBM Content Navigator desktop |
| Learning objectives | After completing this unit, you should be able to:   * Identify the components in the IBM Content Navigator administration tool * Configure a repository * Create an IBM Content Navigator desktop * Find content with a cross-repository search * Create and manage teamspaces * Configure role-based desktop administration |

|  |  |
| --- | --- |
| Exercise 2. Configuring an IBM Content Navigator desktop  Duration: 4 hours | |
| Overview | In this exercise, you learn how to configure various components for an IBM Content Navigator desktop. |
| Learning objectives | After completing this exercise, you should be able to:   * Configure a repository * Create an IBM Content Navigator desktop * Find content with a cross-repository search * Create and manage teamspaces * Configure role-based desktop administration |

|  |  |
| --- | --- |
| Unit 3. Customizing an IBM Content Navigator Desktop  Duration: 2 hours | |
| Overview | This unit shows you how to customize various components for an IBM Content Navigator desktop. |
| Learning objectives | After completing this unit, you should be able to:   * Customize a desktop banner, login page, and theme * Modify menus, icons, and labels * Create a viewer map * Register a plug-in |

|  |  |
| --- | --- |
| Exercise 3. Customizing an IBM Content Navigator Desktop  Duration: 2 hours and 30 minutes | |
| Overview | In this exercise, you learn how to customize various components for an IBM Content Navigator desktop. |
| Learning objectives | After completing this exercise, you should be able to:   * Customize a desktop banner, login page, and theme * Modify menus, icons, and labels * Create a viewer map * Register a plug-in |

|  |  |
| --- | --- |
| Unit 4. Entry Templates  Duration: 1 hour and 30 minutes | |
| Overview | In this unit, you learn how to configure entry template management, and how to build and use entry templates. |
| Learning objectives | After completing this unit, you should be able to:   * Describe the use of IBM Content Navigator entry templates * Configure entry template management * Build an entry template to add documents * Associate entry templates with a folder * Customize property layouts for entry templates |

|  |  |
| --- | --- |
| Exercise 4. Configuring Entry Templates  Duration: 1 hour and 30 minutes | |
| Overview | In this exercise, you learn how to configure entry template management and how to build and use entry templates. |
| Learning objectives | After completing this exercise, you should be able to:   * Configure entry template management * Build an entry template to add documents * Associate entry templates with a folder * Customize property layouts for entry templates |

|  |  |
| --- | --- |
| Unit 5. Role-based redactions  Duration: 1 hour | |
| Overview | This unit describes how to configure and implement role-based redactions. |
| Learning objectives | After completing this unit, you should be able to:   * Describe the advantages of role-based redactions * Enable role-based redactions for a repository * Configure redaction reasons, roles, and policies * Work with role-based redactions |

|  |  |
| --- | --- |
| Exercise 5. Configuring and working with role-based redactions  Duration: 1 hour and 30 minutes | |
| Overview | In this exercise, you learn how to configure role-based redactions and implement it for the documents. |
| Learning objectives | After completing this exercise, you should be able to:   * Enable role-based redactions for a repository * Configure redaction reasons, roles, and policies * Work with role-based redaction annotations |

|  |  |
| --- | --- |
| Unit 6. IBM Content Navigator Sync  Duration: 1 hour | |
| Overview | This unit teaches you how to configure IBM Content Navigator Sync and sync content across multiple devices. |
| Learning objectives | After completing this unit, you should be able to:   * Describe the IBM Content Navigator Sync feature * Configure IBM Navigator Sync * Sync content across multiple devices * Resolve sync conflicts |

|  |  |
| --- | --- |
| Exercise 6. Configuring and using IBM Navigator Sync  Duration: 1 hour and 30 minutes | |
| Overview | In this exercise, you learn how to configure IBM Navigator Sync and sync content across multiple devices. |
| Learning objectives | After completing this exercise, you should be able to:   * Configure IBM Navigator Sync * Sync content across multiple devices * Resolve sync conflicts |

|  |  |
| --- | --- |
| Unit 7. IBM Content Navigator Edit Service  Duration: 1 hour | |
| Overview | This unit teaches you how to configure the Edit Service client and use it to edit the documents in their native applications. |
| Learning objectives | After completing this unit, you should be able to:   * Describe the use of IBM Content Navigator Edit service * Configure the Edit Service client * Use the Edit Service client to edit repository documents |

|  |  |
| --- | --- |
| Exercise 7. Configuring and using the Edit Service client  Duration: 1 hour | |
| Overview | In this exercise, you learn how to configure the Edit Service client for IBM Content Navigator and use it to edit the documents in their native applications. |
| Learning objectives | After completing this exercise, you should be able to:   * Configure the Edit Service client * Use the Edit Service client to edit repository documents |

|  |  |
| --- | --- |
| Unit 8. External Share  Duration: 1 hour | |
| Overview | This unit explains how to configure external share and share the repository content in a secured manner with users from an external organization. |
| Learning objectives | After completing this unit, you should be able to:   * Describe how the external share works * Understand high-level requirements for external share * Configure external share in IBM Content Navigator * Share contents and manage shares as an internal user * Accept shares and view, download, and edit the shared documents as an external user |

|  |  |
| --- | --- |
| Exercise 8. Configuring and managing external share  Duration: 1 hour and 30 minutes | |
| Overview | In this exercise, you learn how to configure external share and share the repository content in a secured manner with users from an external organization. |
| Learning objectives | After completing this exercise, you should be able to:   * Configure external share in IBM Content Navigator * Share contents and manage shares as an internal user * Accept shares and view, download, and edit the shared documents as an external user |

For more information

To learn more about this course and other related offerings, and to schedule training, see **ibm.com**/training

To learn more about validating your technical skills with IBM certification, see **ibm.com**/certify