

IBM Content Navigator
Version 2 Release 0

User's Guide



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Note

Before using this information and the product it supports, read the information in "Notices" on page 37.

Edition notices

This edition applies to version 8, release 5 of later of IBM Content Manager OnDemand for Multiplatforms (product number 5724-J33), version 8, release 5 or later of IBM Content Manager OnDemand for z/OS (product number 5697-N93), version 7, release 1 or later of IBM Content Manager OnDemand for i (product number 5770-RD1), version 8, release 4 or later of IBM Content Manager Enterprise Edition (program number 5724-B19), version 8, release 4 or later of IBM Content Manager for z/OS (program number 5697-H60), version 5 release 0 or later IBM FileNet Content Manager (program number 5724-R81) and to all subsequent releases and modifications until otherwise indicated in new editions.

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Contents

Getting started with IBM Content Navigator	1	Holding content (IBM Content Manager OnDemand).	23
Content organization	3	Processing workflows (IBM FileNet P8)	25
Teamspaces	3	Processing documents in a workflow (IBM Content Manager).	27
Scenario: Creating a teamspace	4	Tips for working in IBM Content Navigator	29
Teamspace templates	4	Accessibility features of IBM Content Navigator	31
Scenario: Creating a teamspace template	5	Notices	37
Content security	7	Trademarks	39
Roles	9	Index	41
Search tips	11		
Searching for content across repositories (IBM FileNet P8)	14		
Entry templates (IBM FileNet P8)	17		
Versions (IBM FileNet P8).	19		

Getting started with IBM Content Navigator

Start here to learn how you can use IBM® Content Navigator to collaborate in teamspaces, search, and work with your items.

“Content organization” on page 3

To find items in your repository more quickly, you can use folders and teamspaces to organize your content.

“Content security” on page 7

The security settings for items such as teamspace templates, documents, folders, and searches determine who can view and modify content and properties. Your administrator determines whether you can view or change security permissions for these items. If you have the appropriate permission, you can edit the security permissions to give other users access to these items.

“Search tips” on page 11

To narrow your search results, you can define exact matches, use wildcard characters, exclude terms, and define how close or far words are in a document. Depending on the search engine configuration for your repository, some of the search options or operators might be available.

“Entry templates (IBM FileNet P8)” on page 17

You can use entry templates to add a document to and create a folder in a repository.

“Versions (IBM FileNet P8)” on page 19

The documents that you work with can require many changes during their lifetime. They are first created and then modified many times. Information about versions helps you manage your content. The versions of a document provide a history of the changes that the document had from the time it was initially created.

“Holding content (IBM Content Manager OnDemand)” on page 23

Documents in Content Manager OnDemand are retained for a specified time, after which they are removed.

“Processing workflows (IBM FileNet P8)” on page 25

When a workflow is launched, each work item in the workflow is automatically placed in a personal or public in-basket. The workflow definition, which is created by the workflow process designer, determines where and when work items are routed and processed.

“Processing documents in a workflow (IBM Content Manager)” on page 27

You can manage documents by using a document routing workflow process.

“Tips for working in IBM Content Navigator” on page 29

Hints and tips provide helpful information about searching and working with items.

Content organization

To find items in your repository more quickly, you can use folders and teamspaces to organize your content.

Folders help you find items more quickly because those items are in one location. You can also use a teamspace to complete tasks or projects that require multiple items and collaboration from other users.

A teamspace template makes it easier to create teamspaces by providing predefined choices for teamspace users. Teamspace users can then specify items that they want to include in their teamspace, such as documents, folders, and searches.

“Teamspaces”

Teams create teamspaces to organize and share content. Teamspaces provide a focused view of the relevant documents, folders, and searches that the team needs to complete their tasks.

“Teamspace templates” on page 4

A teamspace template provides a predefined set of choices for creating a teamspace.

Parent topic: “Getting started with IBM Content Navigator” on page 1

Teamspaces

Teams create teamspaces to organize and share content. Teamspaces provide a focused view of the relevant documents, folders, and searches that the team needs to complete their tasks.

Teamspaces are created from a teamspace template. They are used for projects that recur regularly, such as month-end closing activities in an accounting department. Specific items like documents, folders, and searches that are needed for the project are included in the teamspace. For example, users that are working in the June month-end teamspace can locate the documents they need. They can also include the appropriate people to complete the different tasks for the project. Everything the team members need is in one place. They do not need to manually locate all of the items in the repository each time they do month-end closing.

You can customize most of the choices that are included in the teamspace. How you customize the teamspace might depend on how the teamspace template was defined. However, you cannot modify the roles that are included in the teamspace. You can assign team members to the defined roles in the teamspace. The roles determine the permissions each user has in the teamspace.

You can use classes or entry templates to add documents or folders to the teamspace. If the template that you selected requires you to use classes to add documents, add to or remove classes from the teamspace. If you have the appropriate permissions, you can modify the list of classes in the teamspace.

FileNet P8 If the template that you selected requires you to use entry templates to add documents, add to or remove entry templates from the teamspace. You can

also specify the default entry template that is selected when users add documents to the teamspace. If you have the appropriate permissions, you can modify the list of entry templates in the teamspace.

In addition, when you add documents and folders to the teamspace, you can specify which properties are displayed for the documents and folders.

“Scenario: Creating a teamspace”

IBM Content Navigator provides an example of creating a teamspace for the month-end activities in an accounting department.

Parent topic: “Content organization” on page 3

Related concepts

“Teamspace templates”

A teamspace template provides a predefined set of choices for creating a teamspace.

Scenario: Creating a teamspace

IBM Content Navigator provides an example of creating a teamspace for the month-end activities in an accounting department.

Near the end of June, the accounting department is preparing for their month-end report. Renate, the bookkeeper, uses the month-end teamspace template and creates the June month-end teamspace. Renate assigns the Owner role to herself, Eva, the controller, and Pablo, the accountant. Renate, Pablo, and Eva can add new members to the June month-end teamspace and add content. She assigns the Member role to the other bookkeepers, Henry and Siobhan. They can add and edit content, such as employee tax documents and transaction reports. The Reviewer role is assigned to the department managers. They can review the accounting information for June, but they cannot edit the content.

Renate must send out the employee paychecks. She uses the search that is provided in the teamspace to find employee timecards. The timecards are filed in different folders in the repository. She opens the Payroll folder that is defined in the teamspace and copies all of the employee timecards for the last two weeks of June to that folder. She processes the timecards and asks all of the department managers to review their employee timecards before she creates the paychecks.

Henry is monitoring customers who are more than 30 days late in paying the company. He uses the customer accounts search that is provided in the teamspace, but the search results include customer accounts that are both current and delinquent. He creates another search that finds all of the customer accounts that are delinquent. He creates a Customer Accounts folder in the teamspace and files all of delinquent customer accounts in that folder. Henry then downloads a copy of the customer form letter that is provided in the teamspace and drafts letters to all of the customers who are delinquent in their payments.

Pablo and Eva are also monitoring the company sales revenue and expenses. Renate creates a Reports folder and the bookkeepers add all of the financial statements and reports to that folder. Pablo and Eva analyze all of the financial reports in the Reports folder to determine the profit or loss for June.

Parent topic: “Teamspaces” on page 3

Teamspace templates

A teamspace template provides a predefined set of choices for creating a teamspace.

You create a teamspace template to specify the default documents, folders, searches, and user roles that a teamspace user needs to complete a project or task. The teamspace created from the teamspace template provides a focused view of the items, such as documents and searches, that are accessible to the team. When you create a template, you must provide all of the necessary roles that users need to complete their work. For example, you can give teamspace users the ability to add documents and folders to the teamspace. To add documents, users must have the Add to folders permission. To add folders, users must have the Create subfolders permission.

You can specify whether you want the teamspaces that are created from this teamspace template to use classes or entry templates to add content to the teamspace. Use classes if the repository that you are connected to always uses classes to manage adding new documents.

FileNet P8 If the repository that you are connected to includes entry template and classes, you can also use classes to manage adding new documents. Use entry templates in the following situations:

- The repository that you are connected to always uses entry templates to manage adding new documents.
- The folders in the repository that you are connected to have entry templates associated with them to manage adding new documents.
- The repository that you are connected to includes entry templates, and you want to use them to manage adding new documents.

You can manage your teamspace template when the needs of your team changes. For example, you can modify the searches or folders that you initially included in the teamspace template or make the teamspace template unavailable to other users. By default, the teamspace template is available to users after you create it. However, you can make it unavailable to other users when you are updating it.

“Scenario: Creating a teamspace template”

IBM Content Navigator provides an example of creating a teamspace template for an accounting department.

Parent topic: “Content organization” on page 3

Related concepts

“Teamspaces” on page 3

Teams create teamspaces to organize and share content. Teamspaces provide a focused view of the relevant documents, folders, and searches that the team needs to complete their tasks.

Scenario: Creating a teamspace template

IBM Content Navigator provides an example of creating a teamspace template for an accounting department.

Pablo is an accountant who is responsible for creating a teamspace template that helps him manage some of the accounting information for his company. He creates the month-end teamspace template for his bookkeepers. Therefore, for example, the teamspace template guides the bookkeeper who creates the June month-end teamspace. The template also ensures the necessary documents and folders that are related to payroll, purchase orders, invoices, and tax information are collected. Each month, the bookkeepers can consistently manage the items for monthly reports.

He adds specific searches to the teamspace template for finding folders that contain bookkeeping information, such as employee timecards, tax filings, and customer accounts. To ensure that the documents added to the repository are assigned the appropriate properties for month-end activities, Pablo selects the payroll class and accounts class. The class ensures that the information the bookkeepers provide for each document includes consistent information.

Pablo also includes the Payroll folder and Purchasing folder in the teamspace template. The bookkeepers need access to employee information to process paychecks, invoices to pay vendors, and customer accounts in those folders. He adds a link to the company policy for handling delinquent vendor and customer accounts. For notifying customers and vendors, who are late in paying the company, Pablo adds two form letters as copies in the teamspace template. The bookkeepers can use the customer or vendor form letter as a template when they notify vendors and customers about delinquent accounts.

The bookkeepers and accountants who are working on the month-end closing tasks must be assigned roles in the June month-end teamspace. The roles determine what the bookkeepers and accountants can do in the June month-end teamspace. Pablo assigns the Owner, Member, and Reviewer roles to the teamspace template. For example, the Owner role allows a user to add new members, assign roles to members, and add accounting information to the June month-end teamspace. Users who have the Member role can add and edit accounting information. Users who have the Reviewer role can review the accounting information, but they cannot add or edit it.

Parent topic: "Teamspace templates" on page 4

Content security

The security settings for items such as teamspace templates, documents, folders, and searches determine who can view and modify content and properties. Your administrator determines whether you can view or change security permissions for these items. If you have the appropriate permission, you can edit the security permissions to give other users access to these items.

FileNet P8

IBM FileNet® P8 content security

Typically, when you first create an item, it acquires the default security settings that your administrator defined for the class. These settings identify which users and groups can access the item.

The default security for an item can also be determined by:

- An entry template
- A security policy
- Folder inheritance in which a folder with inheritance security that is defined by your administrator is applied to the item
- Property masks that control which properties you can view and edit, and control the values that you can select from choice lists
- Security markings that restrict access to individual items that use the markings
- A security proxy in which the document inherits its security settings from another document

If you have the appropriate permissions, you can add or modify permissions when you create or edit the item.

For example, when you add a document, the permissions for the document is based on the security that the administrator sets for the class. If you have the appropriate permissions, you can give another user access to the document by sharing the document with that user. When you share the document, you specify the access permission that the user is to have.

The permission level that you specify determines the tasks that the user can perform as follows. You can further limit access to the document by using the advanced options to remove specific tasks from a permission set of the user.

Owner

A user with owner permissions can:

- Manage the document security
- Delete the document
- Promote the document to a major version
- Edit the document
- Edit the document properties
- View the document
- View the document properties

Author

A user with author permissions can:

- Promote the document to a major version
- Edit the document
- Edit the document properties
- View the document
- View the document properties

Reader

A user with reader permissions can:

- View the document
- View the document properties

No access

A user with no access is prevented from accessing the document.

Content Mgr**IBM Content Manager content security**

When you first create an item, it acquires the default security that is defined for the class. These settings identify which users and groups can access the item. If the class is enabled for item-level security and you have the appropriate permissions, you can add or modify permissions when you edit the item.

For example, you can give another user access to the document by sharing the document with that user. When you share the document, you specify the access permission that the user is to have.

Owner

A user with owner permissions can:

- Manage the document security
- Delete the document
- Edit the document
- Edit the document properties
- View the document
- View the document properties

Author

A user with author permissions can:

- Edit the document
- Edit the document properties
- View the document
- View the document properties

Reader

A user with reader permissions can:

- View the document
- View the document properties

OnDemand

IBM Content Manager OnDemand content security

Your IBM Content Manager OnDemand administrator determines your security settings for an item. You cannot change these settings in IBM Content Navigator.

“Roles”

Roles are included in every teamspace that is created from a teamspace template. *Roles* determine which activities users can do in a teamspace if they also have the necessary permissions and access to the associated repository content.

Parent topic: “Getting started with IBM Content Navigator” on page 1

Roles

Roles are included in every teamspace that is created from a teamspace template. *Roles* determine which activities users can do in a teamspace if they also have the necessary permissions and access to the associated repository content.

Each role has a set of associated permissions. Select roles that fit the profile of the users who will be using the teamspace that is created from the teamspace template.

Users cannot modify the roles that are included in a teamspace. When you create a template, you must provide all of the necessary roles that users need to complete their work.

IBM Content Navigator provides three roles:

- Owner
- Member
- Reviewer

You cannot modify or delete these roles.

If you must provide roles with different permissions, you can create new roles or modify existing roles that you created. These roles are specific to the template and can be used only by the teamspaces that are created from that template. To reuse new or modified roles in other templates, you must share the roles by selecting them in the **Available roles** list and clicking **Make Available**. To delete a role that you created, right-click it and click **Delete**.

You might establish a teamspace template for teams who create your annual report. Teamspace owners can add new members to the teamspace, assign roles to members, and add content. Members can add and edit content. Reviewers can search for and review content but not add or edit it. Each year as the annual report work begins, the leader of the team can create a teamspace from the template, and specify herself and another team member as the Owner of the teamspace. All content writers are assigned the Member role, and reviewers are assigned Reviewers. You might also need an Editor role for the person who edits the full report. The editor can edit any content, but cannot create folders or move content to another folder.

Repository security and roles

The permissions that are associated with an assigned role do not supersede the privileges or access control set in the repository.

Deirdre has the role Editor, which allows her to view or edit any document in the teamspace. The documents in the teamspace are stored in IBM FileNet Content Manager. In the repository, Deirdre has access to some folders but not others. Specifically, she can access the Annual report folder, but not the Payroll folder. She has permission to view documents, but not to edit them. With this combination of teamspace role, access control, and privileges, from IBM Content Navigator Deirdre can find all content in the Annual report folder, but not content from the Payroll folder. Even though she has the teamspace role of editor, she cannot edit any content because she does not have permission to edit documents in the repository. Deirdre must ask the IBM FileNet Content Manager administrator, Michelle, to give her edit permission for the folders that she can access from the teamspace.

Content Mgr

Attention: In addition, if a user has super access privileges in IBM Content Manager, but is not assigned a role in a teamspace, the user can still view the teamspace and its contents. The user cannot do anything in the teamspace, because they do not have permission, but the user can find documents that he or she cannot open or change.

Parent topic: “Content security” on page 7

Search tips

To narrow your search results, you can define exact matches, use wildcard characters, exclude terms, and define how close or far words are in a document. Depending on the search engine configuration for your repository, some of the search options or operators might be available.

Matching terms exactly

FileNet P8 **Content Mgr** Surrounding a name or phrase with double quotation marks (") returns search results that contain that exact phrase in the order that the words are displayed in the query. For example, if you want to see documents with the phrase credit card fraud 2012 and you do not want matches for fraud committed in 2011 or earlier, enclose the query inside double quotation marks. Term variants, such as credit cards and credit card frauds, are not considered matches for exact match search. The query "credit card fraud 2012" does not match credit card frauds 2012. Also, no other terms can appear between any two terms in the phrase, so credit card online fraud 2012 does not match. The search is not case sensitive, so it will match Credit Card Fraud 2012. Also, punctuation is ignored, so credit card, fraud 2012 matches.

Table 1. Example of exact match search

Find this	Sample query in the search box
The phrase Justice Department without related phrases.	"Justice Department"
All of the information for a 2011 company annual report for a specific year and not the reports for previous years.	"2011" annual report

Searching for unknown or variable characters or terms

Wildcard characters, such as an asterisk (*) or question mark (?), are useful when you are not sure of the spelling, exact name, or variations of a term. Use the asterisk (*) to match none or multiple characters, but only one term. Use the question mark (?) for a single character.

For example, the query czech* returns documents with the terms czech, czechoslovakia, czechoslovakian, and other words starting with the characters czech, including the word czech without any following characters.

You can also use the wildcard characters in a phrase search. For example, the query John * Kennedy returns documents with the terms John Fitzgerald Kennedy and John F Kennedy.

An asterisk (*) wildcard character behaves differently on different repositories:

- **FileNet P8** **Content Mgr** In IBM FileNet P8 and IBM Content Manager, an asterisk (*) matches any number of characters, including no characters, within a single term. It does not match across a word separator (two or more terms), and there must be a term that contains at least one character for it to match. For example, Jo*dy does not match John Kennedy (two terms).

- **OnDemand** In IBM Content Manager OnDemand, an asterisk (*) matches any number of characters, including no characters, within a single term. It matches across a word separator (two or more terms), and there must be a term that contains at least one character for it to match. For example, Jo*dy matches John Kennedy (two terms).

The query term fin*int matches fingerprint but not fine print.

The search term ra?or matches razor or rasor, but not raptor. Multiple question marks in a row stand for the same number of characters as there are question marks. For example, psych????y matches either psychology or psychiatry but not psychotherapy.

Adding a wildcard character to the beginning of a query (for example, *zech) might cause the search engine to take longer to return results. The search engine must search every character of each potential match at least until it finds zech. For a more efficient search, place the asterisk after czech* to limit the size of information that needs to be searched. The search engine can eliminate all results that do not start with c and then eliminate all results whose second character is not z.

Table 2. Examples of wildcard search

Find this	Sample query in the search box
Information about the judicial court system, such as court documentation, court dockets, or docking court hours.	doc* court
All reports generated by the legal defense departments in both America and Canada. The file names for the reports include the word defense or defence and you remember that the word is spelled differently in both countries.	legal defen?e
The name Mikhail Gorbachev.	Mi*1 Gorbachev

Searching within a specific proximity of words

FileNet P8 To further narrow your search, you can restrict the search results to terms that appear within a range of words. Terms that are close to each other are more likely to be related than terms that are far apart in a document. For example, a smaller number returns documents where there is a strong connection between term A and term B. A larger number returns documents that contain both terms, but their relationship is not as close.

Table 3. Examples of proximity search

Find this	Sample query in the search box
You are reviewing statistics for the crime rates that involves certain vehicles in a specific part of a city. You want to find insurance claims that include information about crimes involving minivans and are handled by specific police precincts.	north police reports minivans car jacking Enter 15 words for the proximity search so that you get fewer results that are a closer match.

Table 3. Examples of proximity search (continued)

Find this	Sample query in the search box
You are gathering research for possible side effects that occurred in diabetes drug trials in the United States and Canada. Your first task is to locate medical records for patients in North America and who are in drug trials for diabetes within a range of words.	North America diabetes drug trials Enter 1000 words for the proximity search so that you get a wider range of results.

Excluding terms

FileNet P8 **Content Mgr** Use the minus sign (-) to exclude items that contain certain terms. The minus sign (-) applies to a term and its variants.

Table 4. Examples of excluding terms

Find this	Sample query in the search box
Documents about the philosopher Calvin and not the cartoon character Calvin.	Calvin -Hobbes.
Documents and images about the original Star Trek series and not about Voyager and Star Trek: The Next Generation.	Star Trek -Voyager -"Next Generation".

Tip: **FileNet P8** To use the minus sign (-) before your search terms, click **Text options > Advanced operators**.

Requiring terms

Content Mgr Use the plus sign (+) to find the items that contain all of the terms that you enter and not just some of them. Placing the plus sign (+) at the front of a term ensures that both terms are included in the search results. Requiring terms is slightly different from an exact match. The exact match is typically used to find phrases where the terms are in a specific order. Requiring terms does not require multiple terms to be in a specific order.

Table 5. Examples of requiring terms in search results

Find this	Sample query in the search box
Only documents that mention landing failures on Mars.	Mars +landings +failures
Insurance claims for house fires in specific cities in Washington.	house fires +claims +Seattle +Vancouver

Expanding or limiting property searches

You can further limit or expand your search by selecting one or more operators. The search operators are based on properties that are commonly used when searching for items. The operators are shortcuts to commonly selected criteria, such as ownership (Created by me) or modification date (Added in the last month). Selecting one or more properties and operators limits the search results.

FileNet P8 Use the Contains operator to search for any word or phrase within a particular property. The operator is available if the property you select is enabled

for content-based retrieval (CBR). You can combine your text search criteria with your property searches when you use the Contains operator. However, you cannot select the Property options to match all or any of the properties in your search.

Searching for special characters

You can include special characters, such as " \ (), spaces, or Boolean operators (AND, OR, NOT), as literal terms in a search query by preceding the special character with a backslash (\), which is an escape character. If the escape character (\) precedes a character that is not special, the escape character \ is ignored.

Single characters that require the escape character include Unicode characters, for example, + - () : ^ @ [] \ { } ~ * ? < > = !. However, the only special characters that require the escape character when they are included in a query between double quotation marks are * ? " \.

If you want to search for words or characters that are also operators in search queries, such as Boolean operators, proximity operators, or mathematical symbols such as <=, >=, !=, , insert a backslash (\) before the character or word. Special character sequences consisting of more than one symbol, such as <= and >=, must escape each symbol. Special character sequences that consist of alphabetical characters, such as SENTENCE, require only one escape character, such as, \SENTENCE.

Table 6. Examples of search with special characters or words

Find this	Sample query in the search box
The symbols for less than or equal to: <=.	\<=\
The words car and not.	car AND \not
The parenthetical phrase (but not here).	\(but not here\)

“Searching for content across repositories (IBM FileNet P8)”

You can search for items that are stored in a repository that is different from the one you are working in.

Parent topic: “Getting started with IBM Content Navigator” on page 1

Related reference

“Tips for working in IBM Content Navigator” on page 29

Hints and tips provide helpful information about searching and working with items.

Searching for content across repositories (IBM FileNet P8)

You can search for items that are stored in a repository that is different from the one you are working in.

About this task

Searching for content across repositories is useful when you do most of your work in one repository, but you need other items in a different repository. For example, your financial statements are in Repository A, but you are currently working in Repository B. Repository B is where you do most of your work, and you cannot always remember the folder that contains your financial statements in Repository A.

To make the search easier, you create a search in Repository B and configure the search to find the statements in Repository A. Your search results are displayed in Repository B. If you frequently search for those statements, you can save that search criteria to run it later.

Procedure

To search for content across repositories:

1. Do one of the following tasks to search across repositories:

Task	Procedure
Create a search in one repository and specify a different repository in which the search will run.	<ol style="list-style-type: none">1. From the Search in drop-down list, select a different repository in which you want your search to run.2. Enter the rest of the search criteria.
Save a search to a different repository.	<ol style="list-style-type: none">1. Enter the search criteria.2. Click Save and assign a name to the search.3. From Save in drop-down list, select a different repository in which you to save your search.4. Complete the rest of the information for saving a search.

2. Run the search to find the specified content.

Parent topic: "Search tips" on page 11

Entry templates (IBM FileNet P8)

You can use entry templates to add a document to and create a folder in a repository.

Entry templates save you time when the items that you are adding to a repository require the same information. For example, entry templates can specify predefined values, such as the location, class, property values, or security for the items. The information that you enter is consistently applied to all of the items that you add. Entry templates are defined in the IBM FileNet Workplace XT Entry Template Designer. The user who designs the entry template determines what you might see and do when you add an item:

Folders

An entry template might be associated with a folder. When you add a document to a folder, you are required to use the entry template associated with that folder. If more than one entry template is associated with the folder, you can select the entry template you want to use.

Classes

The Add Document and Create New Folder pages behave differently. You cannot change the class for the document or folder because the entry template specifies the class. The properties might be predefined, hidden, reordered, or specified as required. Some sections of the pages might be hidden and the security might be predefined.

Workflows

A workflow might be associated with the entry template. When you add a document, the workflow starts.

Scenario: adding documents by using entry templates

The members of the claims department of an insurance company frequently add status reports to the Insurance Claims repository. These documents are always filed in the same folder, and they use the same class with the same security. The only information that changes is property values for the project name and the date of the report.

Marie designs an entry template that automatically provides the information for the repository, the folder, the default property values, and the security. When Rolf adds a document by using that entry template, he sets only the property values for the project name and the date of the report, which helps him more quickly add documents to the repository.

Parent topic: “Getting started with IBM Content Navigator” on page 1

Related concepts

“Versions (IBM FileNet P8)” on page 19

The documents that you work with can require many changes during their lifetime. They are first created and then modified many times. Information about versions helps you manage your content. The versions of a document provide a history of the changes that the document had from the time it was initially created.

Related tasks

 [Entry template designer](#)

Use the IBM FileNet Workplace XT Entry Template Designer to create an entry template. The template can specify the location, class, property values, and security for new items.

Versions (IBM FileNet P8)

The documents that you work with can require many changes during their lifetime. They are first created and then modified many times. Information about versions helps you manage your content. The versions of a document provide a history of the changes that the document had from the time it was initially created.

A version represents the document as it existed at a particular time in its history. Different versions of a document become the version series for the document. Document versions are created when you check a document in and out of a repository. In addition, when you first add a document to a repository, the **Major version** check box is displayed only for classes that are configured for two-level versioning. When two-level versioning is available, you can use all of the following versioning states:

Released

When a document is in a released state, it is a major version that is typically available to all users.

In Process

When a document is in an in-process state, it is checked in or added as a minor version. This document is still a draft and available only to a restricted set of authors and reviewers.

Reservation

When a document is in a reservation state, its content is being edited. The author who is editing the document reserved it for his or her own use.

Superseded

When a document is in a superseded state, the major or minor version of that document is no longer the most recent version. A major released version is replaced when a more recent major released version exists. A minor version is replaced when there is a more recent minor in-process version. Many superseded major and minor versions can exist in a version series. For example, Jaime adds a document to a repository as a minor version (0.1). The document is in the in-process state. Helen checks out that document and edits it. The document remains a minor version (0.2) and moves into the reservation state. After Helen checks the document back in, the minor version (0.1) is superseded by the minor version (0.2) Helen updated.

Depending on how your system administrator configures your security policies, documents can move automatically between the draft states, which are In Process, Reservation, and Superseded. The draft states have limited access. The Released state has general or public access.

With two-level versioning, you use both major and minor versions, where major versions are new whole numbers and minor versions are new decimal numbers. For example, version 3.2 is major version 3 and minor version 2. Minor version 2 is the second incremental version in the major version 3.

For example, editors and contributors are working on creating a company policy. They use the major and minor versions and the different versioning states to help

them determine the significance of the changes made by others. The versions and versioning states distinguish formal, final versions of documents from working or in-progress versions.

Version promotion and demotion

During the lifecycle of a document, you might need to promote or demote a document version. If you and other contributors to a document are working on a draft of a company policy, that document remains a minor version. After one or more reviews and final approval, you promote the version to a major version. That document version is released and available to everyone. However, if the company policy that you released must be modified, you can demote the major version to a minor version. You and other contributors can revise the document before it is released again.

You can promote the current minor version to a major version or demote the current major version to a minor version without checking the document out or in. When you promote the version, the major version number is incremented by one and the minor version number is set to zero. For example, if version 2.5 is promoted, the version number becomes version 3.0. When you demote the version, the major version number is decremented by one and the minor version number is incremented by one. For example, if version 1.0 is demoted and there is an existing minor version 0.22, the version number becomes version 0.23

Scenario: document versioning that is used for company policies

Claire in human resources writes the new company policy and adds it as a new minor version document (0.1). The next day, her supervisor, Elena, checks out the document to add new information to the policy document. She checks the document back in as a minor version (0.2) and saves her edits. The policy document is still a minor version. Both Claire and Elena are modifying the document and the document is in process and not ready to be released to the rest of the company.

After collaborating on the document with Claire, Elena is satisfied with the changes. She promotes the document to a major version (1.0) and sends a copy to Ivan, the vice president of human resources for review and comments. Ivan checks out the document, adds his changes, and then checks the document back in as a minor version (1.2). He tells Elena that he is satisfied with the company policy and decides it is ready for formal approval from the company president. Marge, the executive assistant to the president, checks out the policy document and promotes the policy document to a major version (2.0). The new company policy is now available and released to the entire company.

A year later, Ivan decides to revise the company policy. Marge demotes the released version to a minor version (1.2). Claire and Elena modify the company policy, and then promote the document to a major version (2.0) for Ivan to review. Ivan checks out the document to review the changes and modifies it. He checks the document back in as a minor version (2.1). He tells Elena that he is satisfied with the revised company policy and it is ready for formal approval from the company president. Marge checks out the policy document and promotes the policy document to a major version (3.0). The revised company policy is now available and released to the entire company.

Parent topic: “Getting started with IBM Content Navigator” on page 1

Related concepts

“Entry templates (IBM FileNet P8)” on page 17

You can use entry templates to add a document to and create a folder in a repository.

Related tasks

 [Entry template designer](#)

Use the IBM FileNet Workplace XT Entry Template Designer to create an entry template. The template can specify the location, class, property values, and security for new items.

Holding content (IBM Content Manager OnDemand)

Documents in Content Manager OnDemand are retained for a specified time, after which they are removed.

About this task

Sometimes you might need to keep certain documents beyond the normal retention period. For example, in some business sectors companies are required by law to maintain certain classes of documents for a specified length of time. You can retain documents by placing a hold on those documents to prevent them from being deleted. Documents on which holds are placed are never deleted, and if you no longer want to retain them you delete the hold. You can place holds on individual documents or all documents in a load. Documents can also later be added to existing holds. You create holds by using the **Apply Hold** menu option. For each hold, you specify the name of the hold and its description.

Parent topic: “Getting started with IBM Content Navigator” on page 1

Processing workflows (IBM FileNet P8)

When a workflow is launched, each work item in the workflow is automatically placed in a personal or public in-basket. The workflow definition, which is created by the workflow process designer, determines where and when work items are routed and processed.

Procedure

To process your work items:

1. Click **Work** to access your assigned work items and to access public in-baskets.
2. Locate the in-basket that contains the list of work items that are assigned to you.

You might see one or more of the following types of in-baskets:

Personal in-basket

A list of your assigned work items.

Public in-basket

A public list of unassigned work items.

Tracker in-basket

An in-basket that is used to monitor the status of the workflows.

Tip: Use the filter to quickly find work items.

Tip: When a user opens a work item from a public or personal in-basket, the work item is locked and displays the lock icon.

3. Select and open a work item.
4. Edit the properties of a work item by clicking the **Properties** tab.
5. Work with attachments in the **Attachments** tab. You can view, attach, check in, check out, or delete attachments. Follow your business processes and required tasks for any attachments on the work item.
6. Specify the next action to take on the selected work item.
 - If you are finished processing your work item, complete the step or select one of the appropriate responses required to finish processing the work item.
 - If there are other actions required to process in the work item, select the next appropriate action:

Reassign

Reassign a work item to another user. After you reassign the work item, the work item is updated in the in-basket and in the inbox of the new work item owner.

Return

Return a work item to the sender or originating source. For example, you might want to return an item if there are insufficient details in the work item, so that the sender of the work item can add more information.

Move to In-basket

Move a work item from the public in-basket into your personal in-basket. When a work item is in your personal in-basket, no other users can work on that work item.

Continue processing the work item until you can close the work item.
Parent topic: "Getting started with IBM Content Navigator" on page 1

Processing documents in a workflow (IBM Content Manager)

You can manage documents by using a document routing workflow process.

Procedure

To process documents by routing them in a workflow process:

1. Select one or more items from search results or favorites.
2. Click **Launch Workflow**.
3. Specify the following values:

Workflow name

Select the workflow on which to launch the document.

Priority

Assign an appropriate priority to the document. The value must be between 1 and 32000. The priority of the document determines how quickly a work item is processed.

Owner

Type or select the name of a user.

4. Click **Work** to work with the work items in the worklist.
5. Specify an action to take on the selected work item:

Continue

Continue the work item to the next step in the workflow. If you are working on an assigned work item, the item moves to the next step in the workflow.

Work Item Properties

Edit the workflow properties of the work item. You can:

- Change the workflow that the item is on.
- Change the priority level.
- Change the owner of the work item.

Suspend

Suspend the work item from further processing. You can:

- Suspend the item until you choose to resume processing.
- Suspend the item for a selected time period.
- Suspend the item until a specified date and time.

Remove

Remove the work item from the workflow. This action removes the work item from the workflow. You can retrieve the item in search results or when you browse the tree.

Resume

Resume processing of a suspended item.

Parent topic: "Getting started with IBM Content Navigator" on page 1

Tips for working in IBM Content Navigator

Hints and tips provide helpful information about searching and working with items.

Saving search criteria

If you use a specific search criteria frequently or plan to search at a later time, consider saving the search criteria that you defined. By saving the search criteria, you do not need to specify the same search criteria repeatedly.

Dragging to add a document to the repository

You can add content to the repository by dragging content from your workstation into IBM Content Navigator and thus into the repository. You can drag a document onto the search results area and anywhere in Browse.

Restriction: You cannot drag a selection of multiple documents to IBM Content Navigator. You can drag only one document at a time.

Drag a document to a folder in search results or to any folder in Browse. The document is added to the folder.

Drag a document to the search results, but not in a folder. The document is added to the current repository.

Drag a document directly into a folder in the search results. If the search results are a list of documents, you can drag the document to the results. However, if you searched across IBM FileNet Content Manager repositories, you must select the repository, class, and folder where you want to add the item. If you drag a document to these search results, the Add Document wizard is invoked in the current repository.

Dragging to move items around the repository

You can move multiple documents or folders by dragging the items to other locations.

Tip: To select multiple items, press Ctrl and click each item that you want to move. To select a group of items, press Shift and click the first and last item.

In Browse, you can drag items from the tree to the content list and from the content list to the tree.

Refreshing your view

In Browse or Search, if you cannot see a folder or document that you expect to see, click **Refresh** or run the search again.

If you cannot see an item or data that another user has made available, you might need to log out of your web client session and log in again.

Parent topic: “Getting started with IBM Content Navigator” on page 1

Related reference

“Search tips” on page 11

To narrow your search results, you can define exact matches, use wildcard characters, exclude terms, and define how close or far words are in a document. Depending on the search engine configuration for your repository, some of the search options or operators might be available.

Accessibility features of IBM Content Navigator

IBM Content Navigator includes features that make it more accessible for people with disabilities.

Important: The accessibility features are supported on Microsoft Windows operating systems and Mozilla Firefox web browsers only.

Keyboard input and navigation

The following features are available for keyboard input and navigation:

Keyboard input

You can use the keyboard instead of a mouse to operate the web client. To use any button on the user interface, move to the button and press the Enter key. To enter data, move to the input field, enter data, and press Enter or press the Tab key to exit the field.

Keyboard focus

The position of the keyboard focus is outlined or highlighted, indicating which area of the window is active and where your keystrokes will have an effect.

Keyboard Navigation

You can use the Tab key, Shift+Tab, and Arrow keys to move around the major elements of a page, view, or specialized section. For certain elements, such as tree views or the calendar date picker, you can also use the Home, End, Page Up, and Page Down keys. Pressing Ctrl+Shift+Down Arrow on the browse page navigates through the banner, the toolbar, the tree view, and the list view.

Click versus tab focus

To navigate efficiently using the keyboard, it is important to understand the distinction between click focus and tab focus. If you only use the mouse to navigate, tab focus is unimportant; however, tab focus is essential to using keyboard shortcuts.

- Tab focus is indicated by the dotted square around an item. You can change tab focus by using the tab and arrow keys, or by clicking on an item with the mouse.
 - When you navigate using the tab key, you move the tab focus sequentially from one item to the next, and the click focus does not change. At the end of a section of the page, the tab key moves to the first item in the next section.
 - When you use the arrow keys, you move the tab focus and the click focus from one item to the next, within the same screen section.
- Click focus is indicated by the colored highlighting surrounding an item. You can change click focus by clicking on an item with the mouse, by using the arrow keys, or by moving the tab focus to an item and pressing **Enter**.

When IBM Content Navigator opens a new window, such as a specific action, or displays a dialog box that displays warnings or errors, focus is

set back to the top of the page after closing the dialog box or window. Use **Ctrl+Shift+Down Arrow** and **Up Arrow** or use the **Tab** key to get back to your original focus location.

Silent installation

For an accessible version of the installation, you must use the silent installation feature.

Keyboard shortcut keys

You can use the keyboard to access all of the functions of the IBM Content Navigator web client.

In general, keyboard access conforms to standard Microsoft Windows guidelines.

Keyboard access differs from standard Microsoft Windows guidelines in the following ways:

Access keys, tabbing, and tables

Access keys are provided only for buttons and menu items. Press the **Tab** key to reach all fields.

Press the **Tab** key to move the cursor into a table. Press the **Tab** key again to move the cursor to the next cell in a table. To move out of the table to the next field, hold down the **Ctrl** key and press **Tab**. When the cursor is in a table, pressing **Enter** is not equivalent to clicking **OK** to close the window; you must move out of the table first.

If you want to edit a cell in a table that contains a combo box, press **F2**, use the **Down** or **Up** arrow key to move to an item, and press **Enter** to select it.

Tabs and paging

Switch between tabs by using the **Left** and **Right Arrow** keys.

Switch to the first tab by using the **Home** key. You can navigate to the last tab by using the **End** key.

Go to the next page by pressing the **Ctrl** key with **Page Down**, then pressing **Ctrl+Tab**.

Go to the previous page by pressing the **Ctrl** key with **Page Up**, then pressing **Ctrl+Shift+Tab**.

Combination boxes

Use the **Up** and **Down Arrow** keys to move to an item. Then, press **Enter** to select it.

Context menus

On Windows, open a context menu by pressing **Shift+F10** or by pressing the Windows context menu key.

In Mozilla Firefox on the Macintosh, open a context menu by pressing **Ctrl+Spacebar**.

In Safari 4 or Chrome on the Macintosh, open a context menu by pressing **VO+Shift+M**.

Navigate menu items by using the **Up Arrow** and **Down Arrow** keys. Then, press **Enter** or the **spacebar** key to activate a menu item or to open a submenu.

Close a context menu or submenu by pressing Esc or the Left Arrow key.

Tree views

Typing characters or pressing Backspace while in the tree does not select an item.

If you have Java 2 Software Development Kit 1.4 on your system, you can press a letter key and the next item in the tree that begins with that character is selected.

You can navigate tree views by using the following keys:

Table 7. Tree view navigation

Action	Key
Navigate into tree	Tab
Navigate to the next sibling	Up Arrow
Open a subtree	Right Arrow
Close a subtree	Left Arrow
Navigate to an open subtree	Right Arrow
Navigate to parent node	Left Arrow
Activate a tree item	Enter
Navigate to first tree node	Home
Navigate to last visible tree node	End

List boxes, check boxes, and radio buttons

In a list box, press the Down Arrow and Up Arrow keys to browse an item and press the Enter key to select an item. To select multiple sequential items, hold down the Shift key while pressing the Down or Up Arrow key.

If you have Java 2 Software Development Kit 1.4 on your system, you can press a letter key to select items within a list box, combination box, or table.

In list boxes, you can select individual radio buttons by pressing the Tab key and then the spacebar key or by using the access keys. Arrow keys do not select radio buttons within a group.

Calendar date picker

Navigate through the date cells by using the Left, Right, Up, and Down arrow keys.

Switch to the same day in the next month by using the Page Down key.

Switch to the same day in the previous month by using the Page Up key.

Switch to the same day in the next year by pressing Ctrl+Page Down.

Switch to the same day in the previous year by pressing Ctrl+Page Up.

Navigate to the first day in the month by using the Home key.

Navigate to the last day in the month by using the End key.

Press Enter to select a date.

Browse and search views

To open the **Actions** menu for actions related to the currently selected item, press Ctrl+M.

To move forward and backward through the major elements of the page, or through a specialized section such as a folder selector pane, press Ctrl+Shift+Down arrow (forward). Press Ctrl+Shift+Up arrow (backward).

Tip: Press the Tab key to move the tab focus to the first item in the section.

Search template

To add a folder to the selected folders list, with the tab and click focus on a folder in the folder tree view, press Enter.

To remove a folder from the selected folders list, with the tab and click focus on a folder in the selected folders list, press Delete.

To select or clear the **Include subfolders** check box, with the tab and click focus on a folder in the selected folders list, press the spacebar.

Add document

To activate the **Browse** button, move the tab focus to the **Browse** button and press the spacebar.

Class selection and Folder selection

To select a class or folder, with the tab and click focus on an item in the selection tree view, press Enter.

Hover help

Use the Tab key to move to a field or item that has hover help. Then, press Ctrl+F1 to invoke the hover help.

IBM Content Navigator supports standard keyboard shortcuts. See your browser documentation for more information about the keyboard shortcuts available to you.

Navigating pop-up windows

At various times, IBM Content Navigator displays information or error messages in a pop-up window. This section explains how to navigate each type of window using the keyboard, and other accessibility information.

Table 8. This table describes the keys necessary to navigate pop-up windows without a mouse.

Pop-up window type	Keyboard options
Information	To close, press Esc .
Search	To cancel the search, press Esc .
Alert	To close, tab to the available buttons in the window. (For Search only) When the alert box indicates that one or more errors occurred, the screen reader reads all errors, even though they aren't displayed in the alert window. When you close the window, the focus automatically resets to the first error.
Error	To view the full error message, tab to Error output and press Enter . Then tab to the error message. To close, press Esc . Note: In Virtual PC Cursor mode, the focus resets to the top of the current page after the pop-up windows is closed.

Table 8. This table describes the keys necessary to navigate pop-up windows without a mouse. (continued)

Pop-up window type	Keyboard options
Input	Type the requested information. To close, tab to OK or Cancel , and press Enter .

Features for accessible display

The web client has the following features that enhance the user interface and improve accessibility for users with low vision. These enhancements include support for high-contrast settings and customizable font properties.

High-contrast mode

In Windows systems, the client supports the high-contrast mode option that is provided by the operating system. This feature supports a higher contrast between background and foreground colors.

Font settings

In Windows systems, the client inherits the system settings that you specify for the color, size, and font for the text in menus and dialog windows. The client allows you to select the font for the document list.

Non-dependence on color

You do not need to distinguish between colors to use any function of this product.

Compatibility with assistive technologies

The web client is compatible with the JAWS screen reader application. The web client has the properties that are required for JAWS to make on-screen information available to visually impaired users.

Requirement: You must start the JAWS screen reader by using the **java** command instead of the **javaw** command; if you start the screen reader with the **javaw** command, the screen reader does not work properly.

Product documentation

Documentation for this product is available in accessible formats.

Documentation is available in an accessible Eclipse information center in HTML format. With the HTML format, you can view documentation according to the display preferences set in your browser. It also allows the use of screen readers and other assistive technologies.

Documentation is also available in PDF format.

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Parent topic: “Notices” on page 37

Index

A

- accessibility
 - documentation 31
 - keyboard shortcuts 31
 - screen readers, compatible 31

C

- content
 - folders 3
 - holding 23
 - organizing 3
 - teamspace 3

D

- documents
 - adding 19
 - adding to the repository 29
 - adding with entry templates 17
 - checking in 19
 - dragging from your workstation 29
 - holding 23
 - routing in a workflow process 27
 - versions 19

E

- entry template designer
 - creating entry templates 17
- entry templates
 - adding documents 17
 - associating with folders 17
 - entry template designer 17
 - starting workflows 17

F

- folders
 - adding with entry templates 17
 - entry templates 17
 - organizing content 3

H

- holds
 - applying 23
 - new 23
 - removing 23

I

- in-baskets
 - finding work items 25

K

- keyboard
 - shortcuts 31

M

- major versions
 - adding documents 19
 - checking in documents 19
 - demoting 19
- minor versions
 - adding documents 19
 - checking in documents 19
 - promoting 19

O

- operators
 - sample search queries 11
 - special characters in search queries 11
 - wildcard characters in search queries 11

R

- repositories
 - saving searches 14
 - searching across 14
- routing
 - documents in a workflow process 27

S

- saving
 - different repository 14
 - search criteria 14
 - searches 14
- search
 - finding work items 27
- search criteria
 - saving 14, 29
 - search operators 11
- search queries
 - excluding terms 11
 - matching exact terms 11
 - proximity 11
 - refining search criteria 11
 - requiring terms 11
 - sample queries 11
 - special characters 11
 - tips 11
 - wildcard characters 11
- search tips
 - excluding terms 11
 - matching terms 11
 - proximity search 11
 - requiring terms 11
 - sample search queries 11

- search tips (*continued*)
 - special characters 11
- searches
 - repositories 14
 - saving 14
- searching
 - different repository 14
- session timeout
 - adjusting 31

T

- teamspace templates 3
 - creating 5
 - creating teamspaces 3
 - managing 5
 - scenario 5
 - sharing 5
 - teamspace 5
- teamspace
 - creating 5
 - folders 3
 - organizing content 3
 - overview 3
 - scenario 4
 - sharing 3
 - teamspace templates 3, 5

V

- versioning states
 - in process 19
 - released 19
 - reservation 19
 - superseded 19
- versions
 - adding documents 19
 - checking in documents 19
 - demote 19
 - major 19
 - minor 19
 - promoting 19

W

- wildcard characters
 - sample search queries 11
 - search tips 11
- work items
 - processing 25
 - searching 27
- workflows
 - finding work items 27
 - processing 25
 - routing documents 27



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