

Create new document types in IBM Connections Content Manager

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Introduction

By default there is only one document type in a CCM Library, the type “document”; Filenet, the base of CCM, has the possibility of defining various document types which can have various kinds of metadata associated. In this article I explain how to create a new document type in CCM.

Some definitions:

class

In object-oriented design or programming, a model or template that can be used to create objects with a common definition and common properties, operations, and behavior. An object is an instance of a class.

property template

A template for creating one or more custom properties that can be assigned to one or more classes.

custom property

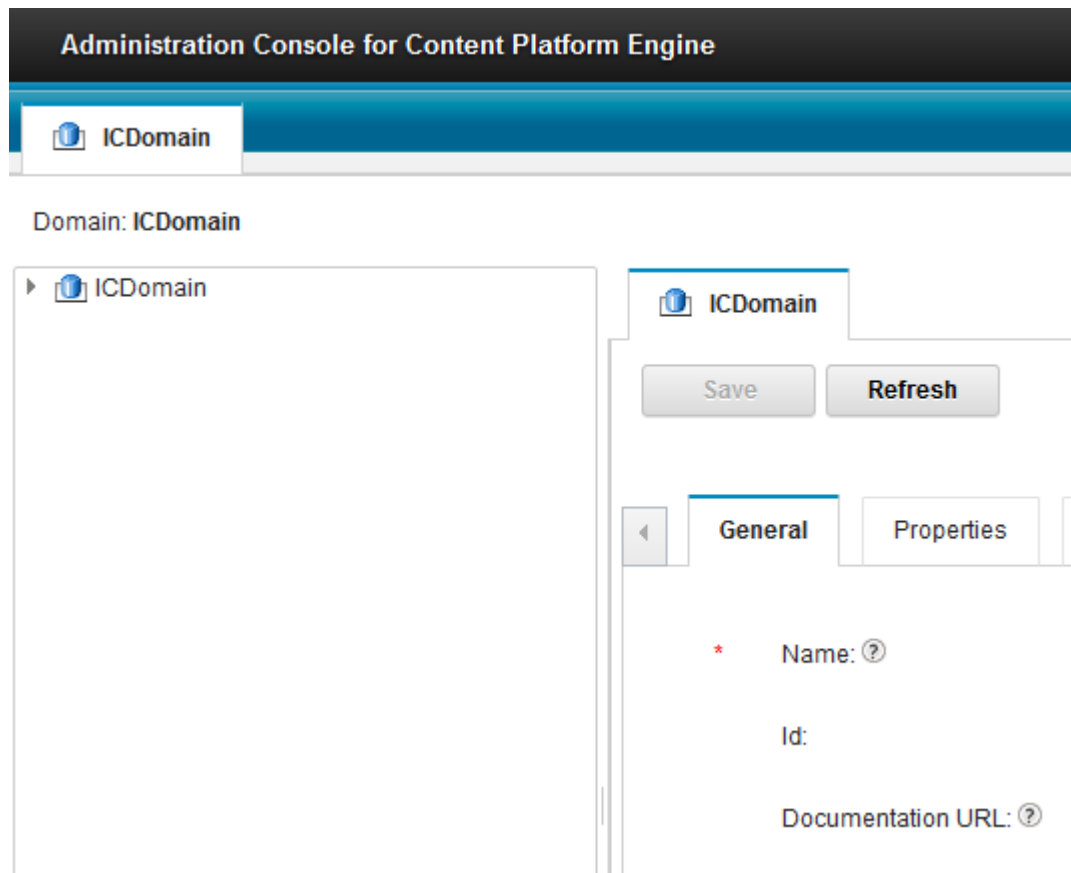
A user-defined property, as opposed to a system-defined property. The user can assign custom properties to a class

In order to create a new document type, we will have to define first some new Property Templates that will define the various metadata of the document type, then create a new Class and associate the properties we want the document to have.

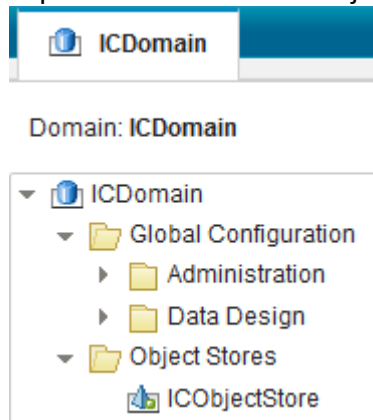
In this exercise I will create a document type “Project” with three properties associated, project code, project status, due date.

Step 1 – Create the properties

Log on to the Administration Console for Content Platform Engine at the address <http://youserver.yourdomain.com/acce>

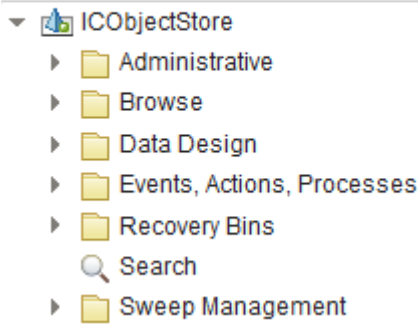


Expand ICDomain then Object Stores, you will find the object store used by ICCM

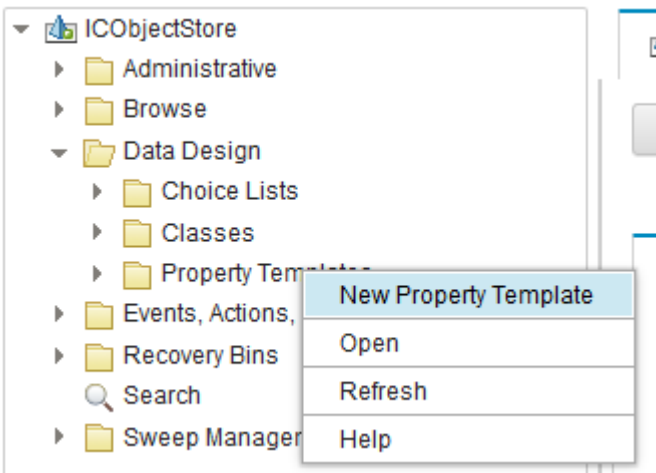


select the ICObjectStore

Object Store: IObjectStore



Expand Data Design and right click on Property Templates, select New Property Template



A wizard will start, that will guide you through the various steps needed.

We need to define a name, type "Due Date" in the Display name, by default the Symbolic name will automatically inherit the same value, if you want you can change it.



Name and Describe the Property Template

A property template is a collection of metadata properties that globally define custom properties. You can assign properties to classes of an object store. Within a class family.

* Display name:

Existing names:

- Active Review
- Activity Stream Extended Settings
- Activity Stream Gadget URL
- Activity Stream Generation Enabled
- Activity Stream HTTP Endpoint URL
- Activity Stream Ignored User Ids
- Activity Stream Object Date Created
- Activity Stream Object Id
- Activity Stream Retrieval URL

* Symbolic name:

Click Next
Select the Data type

[< Back](#) [Next >](#) [Finish](#) [Cancel](#)

Select the Data Type

The data type defines the kind of data the property template will contain. You cannot change this after the property template is created.

* Data type: ?

- Binary
- Boolean
- Date Time
- Float
- ID
- Integer
- Object
- String

In our case select Date Time

[< Back](#) [Next >](#) [Finish](#) [Cancel](#)

Select the Data Type

The data type defines the kind of data the property template will contain. You cannot change this after the property template is created.

* Data type: ?

Date Time

Click Next

Select Single value in the next screen

[< Back](#) [Next >](#) [Finish](#) [Cancel](#)

Single or Multi-Value?

Choose whether the object property can hold a single value or multiple values. Most properties are single value, but if the property will contain a list, then choose multi-value.

Single or multi-value:

Single ?

Multi ?

List order:

Non-unique and ordered values (such as lines in address) ?

Unique and ordered values (such as the list of primary colors) ?

Set other attributes ?

Click Next, a summary of the selected options will appear

< Back

Next >

Finish

Cancel

Summary

Name	Value
Display name	Due Date
Symbolic name	DueDate
Description	Due Date
Data type	Date Time
Single or multi-value	Single
List order	Non-unique and ordered values (such as lines in address)
Set other attributes	False

Click Finish



ICObjectStore



New Property Template x

Open

Close

Success

Start time: May 31, 2013 5:03:04 PM GMT+02:00

End time: May 31, 2013 5:03:06 PM GMT+02:00

Elapsed time: 1 seconds

100%

Created "Due Date"

Now perform again the same steps to create the Property Templates Project Code

Name and Describe the Property Template

A property template is a collection of metadata properties that globally define custom properties. You can assign properties to classes of an object store. When within a class family.

* Display name: ?

Existing names:

- Active Review
- Activity Stream Extended Settings
- Activity Stream Gadget URL
- Activity Stream Generation Enabled
- Activity Stream HTTP Endpoint URL
- Activity Stream Ignored User Ids
- Activity Stream Object Date Created
- Activity Stream Object Id
- Activity Stream Retrieval URL

* Symbolic name: ?

ICObjectStore | New Property Template x | **New Property Template * x**

< Back | Next > | Finish | Cancel

Select the Data Type

The data type defines the kind of data the property template will contain. You cannot change this after the property template is created.

* Data type: ?

< Back | Next > | Finish | Cancel

Select Choice List or Marking Set

Assign a choice list of a string data type to the property template. The string data type is for choice lists that contain text or that include characters such as numbers, letters, symbols, or spaces.

[Learn more...](#)

Assign choice list ?

Assign marking set ?

[< Back](#) [Next >](#) [Finish](#) [Cancel](#)

Single or Multi-Value?

Choose whether the object property can hold a single value or multiple values. Most properties are single value, but if the property will contain a list, then choose multi-value.

Single or multi-value:

Single ?

Multi ?

List order:

Non-unique and ordered values (such as lines in address) ?

Unique and ordered values (such as the list of primary colors) ?

Set other attributes ?

[< Back](#) [Next >](#) [Finish](#) [Cancel](#)

Summary

Name	Value
Display name	Project code
Symbolic name	Projectcode
Description	Project code
Data type	String
Assign choice list	False
Assign marking set	False
Single or multi-value	Single
List order	Non-unique and ordered values (such as lines in address)
Set other attributes	False

[Open](#) [Close](#)

Success

Start time: May 31, 2013 5:08:50 PM GMT+02:00

End time: May 31, 2013 5:08:52 PM GMT+02:00

Elapsed time: 1 seconds

100%

Created "Project code"

Now perform again the same steps to create the Property Templates Project Status

Name and Describe the Property Template

A property template is a collection of metadata properties that globally define custom properties. You can assign properties to classes of an object store, within a class family.

* Display name: [?](#)

Existing names:

- Active Review
- Activity Stream Extended Settings
- Activity Stream Gadget URL
- Activity Stream Generation Enabled
- Activity Stream HTTP Endpoint URL
- Activity Stream Ignored User Ids
- Activity Stream Object Date Created
- Activity Stream Object Id
- Activity Stream Retrieval URL

* Symbolic name: [?](#)

Select the Data Type

The data type defines the kind of data the property template will contain. You cannot change this after the property template is created.

* Data type: [?](#)

Now we want to create a list of the possible statuses, so check Assign Choice list and click New

Select Choice List or Marking Set

Assign a choice list of a string data type to the property template. The string data type is for choice lists that contain text or that include characters such as numbers, [Learn more...](#)

[Assign choice list ?](#)

[Assign marking set ?](#)

Name the list "Status List"

Define Choice Lists

A choice list is a collection of predefined property values that can simplify the process of entering information for users. Choice lists can prevent users from entering values not defined by the design of an application. [Learn more...](#)

Specify the values that are used to identify the choice list in this object store.

* Display name: [?](#)

Status List

Existing names:

ClbFollowingChoiceList
ClbReviewCommentStatus
ClbReviewModeChoices
Lista stati

Click Next

Select String as data type for the list



Select Data Types

The data type defines the format of the values of the choice list. You can choose string or integer as your data type for your choice list. For example, if you select integer, you cannot change the data type after you create the choice list.

Choice list data type:

String [?](#)

Integer [?](#)

Click Next

Click New Items



Add Choice List Items

You can add new items to the choice list and optionally group the items.

Status List

New Items

New Groups

Edit

Remove

Move Up

Move Down

We now define the statuses that our Project can have.
Type "Not started" and click Add

New Items

Add the items that you want to include in the choice list. The data type of the value of the item must match the data type that you selected for the choice list. For example, if you selected an integer data type, you might enter the name of a city for the display name, and then enter the zip code of the city for the value.

Add items to:

Status List

* Display name: ?

Not started

Add

Value: ?

✓	Name	Value	

Remove

OK

Cancel

Now add "Started" and "Complete" and click OK. At the end the list will look like this

< Back

Next >

Finish

Cancel

Add Choice List Items

You can add new items to the choice list and optionally group the items.

- ▼ Status List
 - Not started(Not started)
 - Started(Started)
 - Complete(Complete)

New Items

New Groups

Edit

Remove

Move Up

Move Down

Click Next



Summary

Name	Value
Display name	Status List
Description	Status List
Choice list data type	String

Click Finish

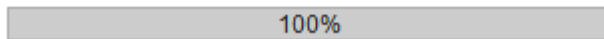


Success

Start time: May 31, 2013 5:25:56 PM GMT+02:00

End time: May 31, 2013 5:25:57 PM GMT+02:00

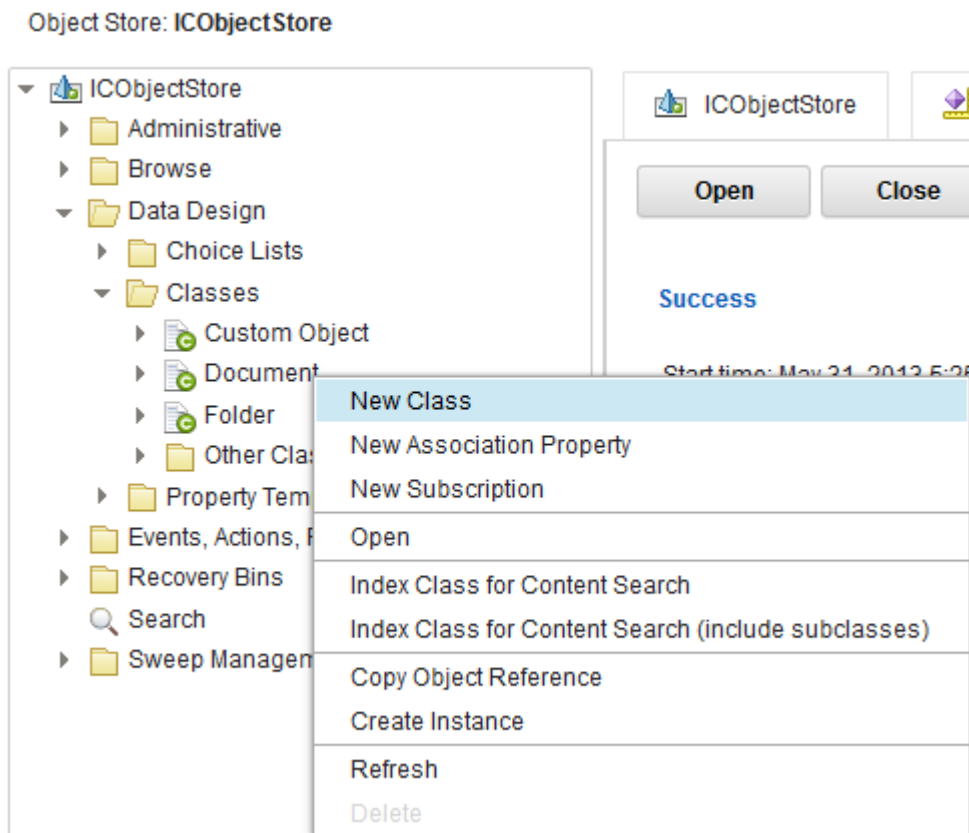
Elapsed time: 1 seconds



Created "Status List"

Step 2 - define the document type "Project".

In the navigator, expand Classes and right click on Document and select New Class



Type "Project"



Name and Describe the Class

The name describes the class and must be unique within an object store.

* Name: ?

Project

* Symbolic name: ?

Project

Existing symbolic names:

Annotation
AsyncUpgradeQueueItem
AuditConfigurationEvent
CancelCheckoutEvent
ChangeClassEvent
ChangeStateEvent
CheckinEvent
CheckoutEvent
ChoiceList

Click Next

A summary will appear, click Finish

Summary

Name	Value
Name	Project
Symbolic name	Project
Description	Project

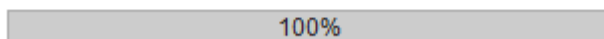
When finished you will see this. Click "Open"

Success

Start time: May 31, 2013 5:36:52 PM GMT+02:00

End time: May 31, 2013 5:36:54 PM GMT+02:00

Elapsed time: 2 seconds



Created "Project"

Select the tab "Property Definitions"

Class Definition: Project

Navigation tabs:

Fields:

- Display name:
- Symbolic name:
- Description:
- Superclass definition:
- Immediate subclasses:

Click "Add"

Save Refresh Actions Close

Class Definition: Project

General Properties Property Definitions Default

Add Remove

Inherited properties ?
 System properties ?

<input type="checkbox"/>	Property	Data Type	Is Na
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From the list of Properties select "Project Code", "ProjectStatus" and "Due Date"

Add Properties

<input type="checkbox"/>	Property	Data Type	Id
<input type="checkbox"/>	Originator	String	{F089DB50-BB29-4424-9195-DDC4C4F755BB}
<input type="checkbox"/>	Privileges	Binary	{E59F45DA-2D07-44C8-827E-98E3FE65CD43}
<input checked="" type="checkbox"/>	Project code	String	{40424FF9-1B95-4AF2-8E1A-B4370C936BCE}
<input checked="" type="checkbox"/>	ProjectStatus	String	{11815C69-B0C5-47FE-8C36-A8C0D6B58DE1}
<input type="checkbox"/>	Promote On Approval	Boolean	{3B5360CD-32F5-4C07-B571-0CE996EFCF59}

OK Cancel

Click "Save"

Save Refresh Actions Close

Class Definition: Project

General Properties **Property Definitions** Def

Add Remove

Inherited properties ?
 System properties ?

<input type="checkbox"/>	Property	Data Type	Is I
<input type="checkbox"/>	Due Date	Date Time	
<input type="checkbox"/>	Project code	String	
<input type="checkbox"/>	ProjectStatus	String	

Close the Administrative Console

Using the new Document type

Create a Library in a Community in Connections and in the properties of the Library select to allow users to change document type

CCM Library

Edit Library Settings

* Name:

Roles: ? Community members have access to files and folders as:

- Reader
- Contributor (upload, create, and maintain editor access on files they have added)
- Editor (upload and edit all files and folders)

Document list sort: Select a column and sort order to apply to the compact list of documents and folders.

Sort column:

[Restore Defaults](#)

Document types: ? Default document type: Documento [Change...](#)

Allow members to change the Document Type on files added to this Library widget. ?

Draft Review: ?

- Do not require review
- Require review

* Required

Upload a file

Upload File

*File: ?

*File name: ?

Tags: ?

Description:

Document type: Documento [Change...](#)

As you can see we can now change the document type. Click on Change and select Project

Choose Document Type

Click the document type to select it.

1-4 of 4 Previous | Next

Name ^

- Commissa
- Documento
- Progetto
- Project**

Show 10 | 25 items per page Previous | Next

The new upload file box will show

Upload File

*File: ?

*File name: ?

Tags: ?

Description:

Document type: Project [Change...](#)

Document Type Properties

Show only required fields

Show inline help text

▼ **Project**

Due Date:

Project code:
This field accepts numbers, letters, and special characters.

ProjectStatus: ▼

Now, click on Due Date

▼ **Project**

Due Date:

Project code:

ProjectStatus:

May						
S	M	T	W	T	F	S
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8
2012		2013	2014			

id special characters.

Type something in the Project Code field and click on Project Status

Upload File

*File: ?

*File name: ?

Tags: ?

Description:

Document type: Project [Change...](#)

Document Type Properties

- Show only required fields
 Show inline help text

▼ Project

Due Date:

Project code:
This field accepts numbers, letters, and special characters.

ProjectStatus:

Using this technique you can create as many document types and properties as you like.