



# Top 10 Tips for Getting the Most Out of Your IBM Content Manager OnDemand System



Ensure you get the maximum value from your IBM® Content Manager OnDemand (CMOD) investment with these helpful hints and tips.

## 1 FIX THOSE PESKY TRIGGER PROBLEMS

When creating report object definitions, use Record Range for trigger 2 onwards. This enables you to deal with inconsistent data and solves the problem of trigger 1 appearing beyond the page boundary (on page 2, for example). It also prevents page 1 from being discarded.

**Here's how it works:** Carriage control is trigger 1, but the report number (RPT NO:) appears on page 2 where you want to capture the report date, number, etc. (sometimes it appears on line 2, 3 or 4). For example, if the first page has 8 lines you would typically define:

```
Trigger1=*,10,'RPT_NO:',(TYPE=GROUP)
Indexstartby=2
```

The problem with this definition is that page 1 is discarded. To get around this, you need to make carriage control trigger 1 and RPT\_NO: trigger 2 utilizing record range. However, **the graphical indexer will not execute when the record range exceeds a page boundary**. So here's what you need to do:

- Set CC=NO when you open the file using sample data
- Set Trigger1=\*,1,'1',(TYPE=GROUP)
- Set Trigger2=\*,\*,'RPT\_NO:',(TYPE=GROUP,RECORDRANGE=(5,20))
- Collect all the fields you need and assign them to indexes
- Before saving the application, change to CC=YES

Voilà- problem solved!

## 2 PREVENT REPORT IDENTIFICATION ISSUES

Report titles change as time goes on due to input file changes, yet report numbers remain the same. To avoid problems identifying reports due to frequently changing titles, **hard code the report title** (using the Constant line in the "add a field" panel) and combine it with the report number index. This ensures report name consistency when the input file changes.

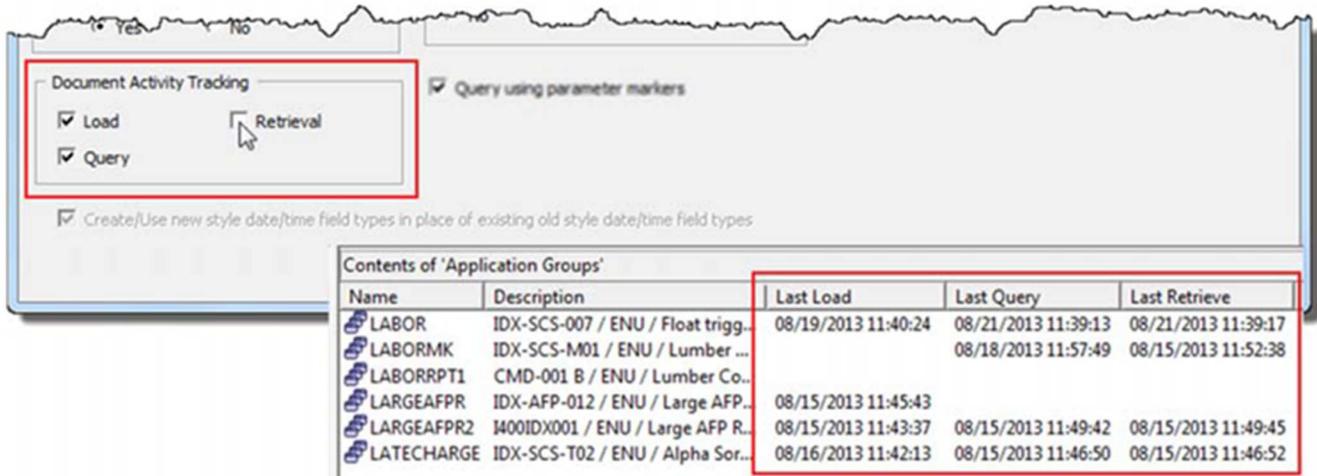
## 3 EXPEDITE ACCESS TO NEW REPORTS

If you have a new CMOD client/end user with legacy data that will eventually be loaded into CMOD, separate application groups should be created for the "go forward" (current) reports and for the legacy reports.

This enables the user to go "live" with the current reports almost immediately. The legacy reports can come later because experience tells us that input files change over time. This means application indexing must be adjusted as legacy files are loaded. Because the legacy reports are in their own application group, they can be updated as input files change, enabling the live applications to continue loading without interruption.

## 4 TURN ON TRACK LAST LOAD, QUERY & RETRIEVAL FOR APPLICATION GROUPS

Fields including Track Last Load, Query and Retrieval provide information on system usage such as who is accessing reports, when a report was last loaded, etc. You can view this information by turning on the application group via the Advanced button on the application group general tab.



## 5 CREATE ACCURATE TRIGGER & FIELD DEFINITIONS IN PDF INDEXER

Use the zoom function of the Graphical Indexer within the PDF Indexer to quickly get the most accurate coordinates for creating trigger and field definitions. For example, a zoom factor of 1000% is applied in the PDF data stream shown below. This enables the correct values for the Report Name field to be easily selected.

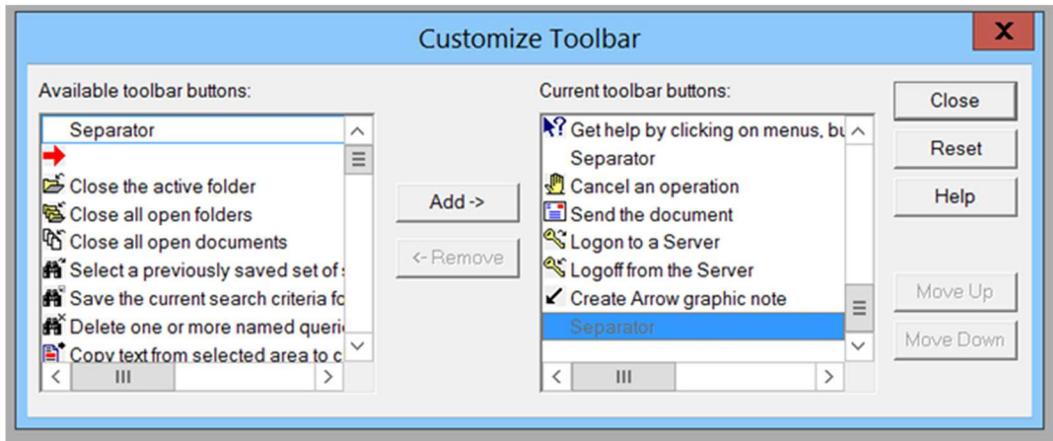


## 6 MAKE USERS MORE PRODUCTIVE WITH CUSTOM TOOLBARS

Make your users' lives easier and more productive by customizing the tool bar with the Windows client *before* you give them the zipped Windows client file for installation.

*Tip continued on next page.*

To update the toolbar, simply select the Customize Toolbar item under the Options field.



To add new toolbar buttons, select a button name from the left hand box and click Add. The button name will then appear in the Current toolbar buttons list. Click Close to update the toolbar with the new buttons.

## 7 DON'T BOTHER MEMORIZING CMOD DATE FORMATS

When setting date format fields in the [?load tab application group field definition tab?](#), select the Help button to quickly view different formats and examples of how to express them in CMOD.

There is also a link to instructions on how to set up custom date formats. Best practices are to use the new date/timestamp field types for all new applications (V9.X and higher) and display all dates using a four digit year.

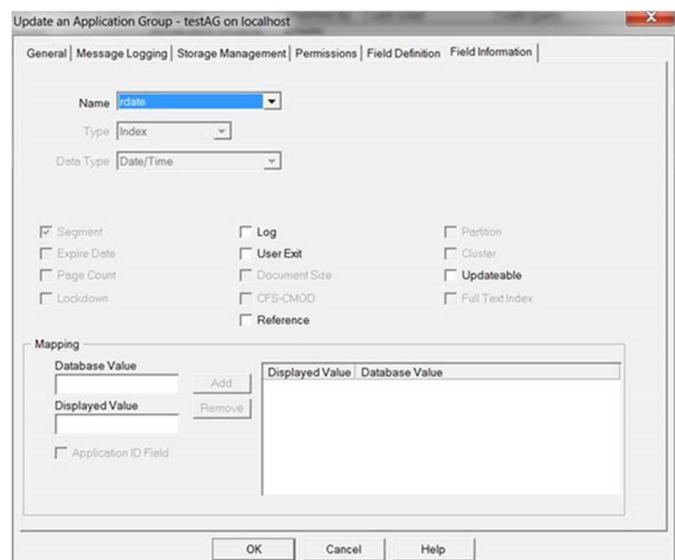
## 8 QUICKLY IDENTIFY FIELDS FOR SCRIPTING PURPOSES

For scripting purposes sometimes you need to identify which field is being used as the segment date, which field is the application ID field, etc. Field identification can be time consuming – if you don't know where to look.

Selection criteria from the field information tab can be found in the mask column of the arsagfld table.

The mask column is a bitmask field defined as an integer in the arsagfld table. A bitmask assigns a meaning to each bit within the integer so that multiple values can be combined and stored as one column.

*Tip continued on next page.*



Arsagfld Table

Here are a few of the most common bitmask fields:

1	filter	64	user exit
2	not in database	1024	reference
4	segment	4096	page count
8	application id field	32768	updateable
32	log	65536	lockdown

For example, if the mask value for field rdate is equal to 32773, then that is 32768 + 4 + 1. This means it is a 'filter', a 'segment' field, and is 'updateable.'

Therefore, you could find the name of the segment field within a script by checking to see if that particular bit is turned on:

```
$ db2 "select name from arsagfld where agid in (select agid from arsag where name='REPORT1') and mod((mask-mod(mask,4))/4,2)=1"
```

```
NAME
-----
rdate
```

Similarly, to find the application ID field, you would use the value for that bit:

```
$ db2 "select name from arsagfld where agid in (select agid from arsag where name='REPORT1') and mod((mask-mod(mask,8))/8,2)=1"
```

## 9 MAKE DISTRIBUTION BUNDLE SETUP EASY

Before creating CMOD report objects such as Application Groups, Applications, Folders, and OnDemand Distribution Facility (ODF), take the time to understand how users need to access documents. Create a form to gather not only the retention/indexing requirements, but also the viewing requirements.

Once you have this information, determine your report and document distributions for the ODF. To assist with ODF definitions, create the following tables/spreadsheets:

- **Report information** – Provides the relationship between the Report ID, the application group and the application.

Report ID	Application group	Application
Daily sales invoices	Daily sales invoices	Daily sales invoices

*Tip continued on next page.*

- **Recipient information** – Provides the administrator with the user (employee) name, recipient name, recipient details (i.e. department number, address, region, email).

Employee name	Recipient name	Department number	Email address	Region
Andy Smith	ASMITH	Dept. 777	asmith@exampleco.com	sf
Thiago Ruiz	TRUIZ	Dept. 777	truiz@exampleco.com	nsf (North San Francisco)
Nadina Aleksandra	NALEKSAN	Dept. 777	naleksan@exampleco.com	wsf (West San Francisco)

- **Output information** – Specifies the format in which reports will be provided (i.e. hardcopy, email attachments, files). Provides information on the timing of the output and the specific report pages/ sections pertaining to the recipient’s region or authority.

Recipient	Report	Selection criteria	Type of output	Timing of output
Andy Smith	Daily sales invoices	Reports for Andy Smith, Thiago Ruiz, Nadina Aleksandra, Sandeep Kapoor, and Ellen Wu	Hardcopy	Every morning at 8 a.m.
Thiago Ruiz	Daily sales invoices	North San Francisco region	Email attachments	As soon as the reports arrive

With this information organized across three tables, setting up distribution bundles is a walk in the park!

## 10 PREVENT USER LOGIN FAILURES POST-LDAP

When a CMOD field is set to case “insensitive,” CMOD converts the field to all capitals and stores it in the database as all capitals. Therefore if LDAP (case sensitivity) is activated for user IDs and passwords, users must be instructed to enter these fields in all capitals to avoid a failed login.

### About enChoice

enChoice®, Inc. provides enterprise content management (ECM) software solutions that improve time-to-solution, the user experience and backup and recovery service levels. enChoice software solutions are complemented by end-to-end ECM services. The company is recognized industry-wide for its innovative, application-aware solutions for IBM FileNet, IBM Content Manager OnDemand and EMC Documentum. Founded in 1993, enChoice is an award-winning IBM Premier Business Partner and an EMC Technology Connect Select Partner.

### About the enChoice CMOD Practice

The enChoice team possesses over 100 years of combined CMOD experience and has performed over 100 installations for leading companies including Arizona Public Service, US Foods, and Winnebago. Services include consulting, installations, migrations, upgrades, remote system administration and managed services (support). enChoice is the only IBM-authorized education provider for CMOD V9.5. enChoice’s OnDemand University offers training courses for new and experienced CMOD users who want to learn how to get the most from their CMOD systems.

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