



# IBM Case Manager 5.2: Solution Implementation

F219  
Course Abstract

## Course description

This course provides a comprehensive guide to designing, developing, securing, and deploying a Case Manager solution. You work with a fully functioning IBM Case Manager system to practice the skills you learn. The system includes two IBM Case Manager Environments, development and User Acceptance Test (UAT environment).

## Duration

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5 days

## Delivery Method

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Instructor-led (Classroom), Instructor-led Online

## Audience

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- Solution architects design, build, and validate Case Manager Solutions within the development environment. They have full control of all the tools within that development environment.
- System administrators migrate, secure, and maintain Case Manager Solutions in QA and production environments. They have control of environment access and are responsible for moving solutions between environments.

## Prerequisites

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- Familiarity with FileNet Content Manager.
- Ability to use IBM Content Navigator for navigating object stores, working with content.

## Course Objectives

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Upon completion of this course, participants will be able to:

- **Introduction to IBM Case Manager**
  - Describe the uses of IBM Case Manager
  - Identify components of IBM Case Manager
  - Create and process a case
  - Review and split a case
  - Explore and identify parts of a solution
  - Describe solution design principles
  - Create a Custom Task
  - Identify add-on components and describe what they are used for
- **Build a Case Manager Solution**
  - Create properties, document types, roles and in-baskets
  - Create a case type and task
  - Create a Workflow
  - Deploy and Test a Solution

- Use Preconditions and Sets
  - Use Business Rules
  - Use Process Designer Integration Capabilities
- **Customize the Client Display**
  - Create custom pages
  - Work with widgets
  - Wire events
  - Customize properties views
- **Security**
  - Manage solution security in development and production environments.
- **Integrated Rules**
  - Create business rules using the integrated rules engine.

## Topics

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### Volume 1:

#### **Introduction to IBM Case Manager**

Introduction to IBM Case Manager  
Create and Process a Case  
Review and Split a Case  
Explore and Identify Parts of a Solution  
Use Solution Design Principles  
Create a Custom Task  
Overview of Add-on Functions

#### **Build a Case Manager Solution**

Create Properties and Document Types  
Create Roles and In-baskets  
Create a Case Type and Task  
Create a Workflow  
Deploy and Test a Solution  
Use Preconditions and Sets  
Use Business Rules  
Use Process Designer Integration Capabilities

#### **Customize the Client Display**

Create Custom Pages  
Work with Widgets  
Wire Events  
Customize Properties Views

## **Volume 2:**

### **Security**

- Overview of Security Deployment
- Work with project areas
- Solution Security
- Create a Security Configuration
- Configure Target Object Store Security
- Configure Deployed Solution Security
- Customize a Privilege Definition
- Use Security Proxies
- Automate Case Security Changes
- Additional Security Configurations

### **Integrated Rules**

- Why use Business Rules
- Create a simple rule
- Create a table-based rule
- Create a complex text-based rule
- Add Parameters to a rule
- Export a rule

## **Appendix**

### **Volume 1: Appendix**

- Appendix
  - Solutions to Exercises

### **Volume 2: Appendices**

- Appendix for Security Unit
  - Solutions to Written Exercises
- Appendix for Rules Unit
  - Knowledge Check Answers
  - Configure Business Rules
  - Start and Stop System Components
  - Troubleshooting
  - Issues and Resolutions