



# IBM Case Manager 5.2

## Customize and Extend the Features

**F217**  
**Course Abstract**

### Course description

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This course explores different options for customizing and extending the features of IBM Case Manager including developing widgets.

### Duration

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3 days

### Delivery Method

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Instructor-led (Classroom or Online), SPVC (Self-paced virtual course)

### Audience

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- Developers who are responsible for
  - Customizing and extending the IBM Case Manager features by developing widgets
  - Building a customized user interface for IBM Case Manager
- Anyone who needs to know the IBM Case Manager customization.

### Prerequisites

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- Intermediate level expertise in the following technologies:
  - Java
  - Dojo
  - JavaScript
  - JSON
  - HyperText Markup Language (HTML 5)
  - Cascading Style Sheets (CSS3)
- Experience with Eclipse IDE for developing applications
- Familiarity with deploying applications in WebSphere Application Server
- Familiarity with Case Management concepts
- Recommended prerequisite courses:
  - F248: IBM Case Manager 5.2: Solution Building
  - F122 - IBM Content Navigator 2.0.2: Plug-ins and External Data Services

## Course Objectives

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

- **Customize the Case Manager Client User Interface**
  - Customize the banner and the login page
  - Associate a custom icon for a MIME type
  - Modify labels in the IBM Case Manager Client
  - Create a Viewer Map for PDF files
  - View the Microsoft Word documents in the FileNet Viewer
  - Edit the existing help topics
  - Create a help plug-in
  - Customize the toolbar to implement actions
  - Add a custom action as a menu item
- **Use Scripts to Customize Case Manager Client**
  - Use Script Adapter to customize the Case client
  - Create a toolbar button to start a task
  - Dynamically add a choice list to a case property
  - Validate the data based on a step response
  - Create a case custom workbench page
    - Configure your system for the workbench page
    - Add a Script Adapter to filter In-baskets
    - Add a Script Adapter to filter cases
- **Develop Custom Widgets**
  - Create an IBM Content Navigator plug-in project in Eclipse
  - Create catalog and widget definition JSON files
  - Implement a custom widget (Custom search)
  - Build and register the widget package
  - Test the custom widget
  - Create a Java project in Eclipse for a widget package
  - Implement toolbar and menu for your widget
  - Define widget properties, and add event handling for your widget
  - Build and deploy the widget package with an EAR file
  - Troubleshoot
  - Update an existing widgets package with new widgets (Custom case comment widget as an example)
  - Uninstall a custom widget package in IBM Case Manager
- **Implement External Data Services (EDS)**
  - Check the sample EDS configuration
  - Change the field status dynamically for a property
  - Add an external choice list with EDS

- Create dependent choice lists with EDS
- Implement case property validation
- Prefill an initial value for a case property
- Set the case property field status as required
- Appendix: Steps to set up the sample External Data Service

## Topics

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### **Customize the Case Manager Client User Interface**

Customize the Case Manager Client appearance

Customize the Banner appearance

Customize the login page

Change Icons for the client

Modify the labels in the Case Manager Client

Specify Viewers for File Types

Viewer Maps

Add custom help topics

Creating a help plug-in

Toolbar widgets

### **Use Scripts to Customize Case Manager Client**

IBM Case Manager Development Architecture

IBM Case Manager API toolkits

IBM Content Navigator APIs

IBM Case Manager JavaScript API

Collaborative editing of objects

Script Adapter widget

Adding discretionary tasks

IBM Case Manager classes and events for adding tasks

Adding a choice list to a case property

IBM Case Manager classes for adding a choice list

Data Validation based on a step response

Case custom workbench pages

Filter In-basket SA - Script Adapter widget

Filter Search SA - Script Adapter widget

Tips for the labs and lab overview

### **Develop Custom Widgets**

Custom widget development overview

Developing case management applications

Creating a custom page widget and actions package

IBM Content Navigator plug-in for the custom widget package

Setting up the development environment for plug-ins

Create registry files for the custom widget package

Catalog JSON file

Page widget definition JSON file

IBM Case Manager custom page widget development

Implementing a page widget

Files used to implement a page widget

Contents in a custom page widget package

Options for widget package deployment and registration

Folder structure for the custom widget project

Implement toolbar and menu for your widget

Build and deploy a widget as an EAR file

Widget package structure

Custom case comment widget

Update an existing widget package with new widgets

## **Implement External Data Services (EDS)**

Case data from an external data source

Sample external data service

Java code in the sample EDS service

External Data Configuration in the sample

## **Appendix**

Start and Stop System Components

Debugging and troubleshooting

Additional Information and links