



Course title: IBM Case Foundation 5.2.1: Manage Work in Progress

F234
Course Abstract

Course description

This course is for anyone who is responsible for day-to-day operations of a production IBM Case Foundation workflow application.

Duration

1 day

Delivery Method

Instructor-led (Classroom), Instructor-led Online and SPVC (Self Paced Virtual course)

Audience

- A Workflow System Administrator is responsible for day-to-day operations of a production IBM Case Foundation workflow application.
- A Workflow System Administrator is typically required to help workflow participants to do the following tasks:
 - Locate work and complete workflows.
 - Respond to management decisions that require changes to work items.
 - Gather information about workflow activity to help management make business decisions.
- During the production phase, the Workflow System Administrator manages operation of the workflow application and communicates with users and managers. In the workflow application deployment phase, the Workflow System Administrator coordinates activities with the Workflow Author to plan and control workflow application implementation into the production environment.

Prerequisites

Prerequisite skills and knowledge for this unit are:

- Familiarity with Windows 2008 operating systems.
- Familiarity with Java and Java Virtual Machines.
- General knowledge of relational database management systems.
- General knowledge of P8 Platform security concepts.
- General workflow terminology:
 - Workflow
 - Workflow definitions
 - Queues

- Rosters.
- Start a P8 Platform system.
- Familiarity with P8 Platform administration interfaces, including:
 - Administration Console for Content Platform Engine
 - IBM Content Navigator

Recommended training path:

- F230 IBM Case Foundation 5.2.1: Introduction
- F231 IBM Case Foundation 5.2.1: Configure the Workflow System
- F232 IBM Case Foundation 5.2.1: Security
- F233 IBM Case Foundation 5.2.1: Maintain the Workflow System
- F234 IBM Case Foundation 5.2.1: Manage Work in Progress

Course Objectives

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

- Use Case Foundation tools to search for work with basic and advanced search criteria.
- Modify work items.
- Process and manage work.
- Manage a workflow exception.

Topics

Search for work

Process Administrator
 Search options
 Viewing workflows and work items
 View and customize search results
 Ways to refine a search for work
 Use exposed fields in searches
 Use the Criteria tab to filter a search
 Search user queues
 View workflow history in Process Tracker

Modify work

Reasons to modify work
 Tools for modifying work
 Work item status
 Locking work
 About workflow properties
 Modify data field values
 Modify workflow groups
 Open workflow or work item in Process Tracker
 Modify an attachment reference

Considerations for modifying work

Process and manage work

Tools for processing and managing work

Ways to complete work items

Assign or reassign work to participants

Terminate work

Delete work

Designate a substitute participant

Unlock work

Add and remove trackers

Manage workflow exceptions

About workflow exceptions

Conductor queue

Get information about workflow exceptions

View the information stack

Modify workflows and work items