Course Guide

IBM Case Manager Essentials (V5.3.2)

Course code F2900G ERC 1.0

IBM Training

March 2018

NOTICES

This information was developed for products and services offered in the USA.

IBM may not offer the products, services, or features discussed in this document in other countries. Consult your local IBM representative for information on the products and services currently available in your area. Any reference to an IBM product, program, or service is not intended to state or imply that only that IBM product, program, or service may be used. Any functionally equivalent product, program, or service that does not infringe any IBM intellectual property right may be used instead. However, it is the user's responsibility to evaluate and verify the operation of any non-IBM product, program, or service. IBM may have patents or pending patent applications covering subject matter described in this document. The furnishing of this document does not grant you any license to these patents. You can send license inquiries, in writing, to:

IBM Director of Licensing
IBM Corporation
North Castle Drive, MD-NC119
Armonk, NY 10504-1785
United States of America

The following paragraph does not apply to the United Kingdom or any other country where such provisions are inconsistent with local law: INTERNATIONAL BUSINESS MACHINES CORPORATION PROVIDES THIS PUBLICATION "AS IS" WITHOUT WARRANTY OF ANY KIND, EITHER EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF NON-INFRINGEMENT, MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. Some states do not allow disclaimer of express or implied warranties in certain transactions, therefore, this statement may not apply to you.

This information could include technical inaccuracies or typographical errors. Changes are periodically made to the information herein; these changes will be incorporated in new editions of the publication. IBM may make improvements and/or changes in the product(s) and/or the program(s) described in this publication at any time without notice.

Any references in this information to non-IBM websites are provided for convenience only and do not in any manner serve as an endorsement of those websites. The materials at those websites are not part of the materials for this IBM product and use of those websites is at your own risk.

IBM may use or distribute any of the information you supply in any way it believes appropriate without incurring any obligation to you. Information concerning non-IBM products was obtained from the suppliers of those products, their published announcements or other publicly available sources. IBM has not tested those products and cannot confirm the accuracy of performance, compatibility or any other claims related to non-IBM products. Questions on the capabilities of non-IBM products should be addressed to the suppliers of those products.

This information contains examples of data and reports used in daily business operations. To illustrate them as completely as possible, the examples include the names of individuals, companies, brands, and products. All of these names are fictitious and any similarity to the names and addresses used by an actual business enterprise is entirely coincidental.

TRADEMARKS

IBM, the IBM logo, ibm.com, FileNet, and WebSphere are trademarks or registered trademarks of International Business Machines Corp., registered in many jurisdictions worldwide. Other product and service names might be trademarks of IBM or other companies. A current list of IBM trademarks is available on the web at “Copyright and trademark information” at www.ibm.com/legal/copytrade.shtml.

Adobe, and the Adobe logo, are either registered trademarks or trademarks of Adobe Systems Incorporated in the United States, and/or other countries.

Java and all Java-based trademarks and logos are trademarks or registered trademarks of Oracle and/or its affiliates.

Microsoft, Windows, and the Windows logo are trademarks of Microsoft Corporation in the United States, other countries, or both.

Contents

Course overview

Preface overview

This course is an introduction to IBM Case Manager, concepts, functions, and architecture. Participants use an IBM Case Manager system to practice the skills that are required by case workers to process cases and create runtime tasks.

Intended audience

This course is for solution architects, solution designers, administrators, product managers, or anyone who needs to learn the essentials of IBM Case Manager.

Topics covered

Topics covered in this course include:

- Introduction to IBM Case Manager
- Create and process a case
- Review a case
- Structure of a solution
- Add runtime tasks
- IBM Case Manager integration options

Course prerequisites

Participants should have:

- None

Document conventions

Conventions used in this guide follow Microsoft Windows application standards, where applicable. As well, the following conventions are observed:

- **Bold**: Bold style is used in demonstration and exercise step-by-step solutions to indicate a user interface element that is actively selected.
- **`Bold style + Courier New font`** is used for text that must be typed by the participant.
- *Italic*: Used to reference book titles and highlighting names in text paragraphs.
- CAPITALIZATION: All file names, table names, column names, and folder names appear in this guide exactly as they appear in the application.
  To keep capitalization consistent with this guide, type text exactly as shown.

Exercises

Exercise format

Exercises are designed to allow you to work according to your own pace. Content contained in an exercise is not fully scripted out to provide an additional challenge. Refer back to demonstrations if you need assistance with a particular task. The exercises are structured as follows:

The business question section

This section presents a business-type question followed by a series of tasks. These tasks provide additional information to help guide you through the exercise. Within each task, there may be numbered questions relating to the task. Complete the tasks by using the skills you learned in the unit. If you need more assistance, you can refer to the Task and Results section for more detailed instruction.

The task and results section

This section provides a task based set of instructions that presents the question as a series of numbered tasks to be accomplished. The information in the tasks expands on the business case, providing more details on how to accomplish a task. Screen captures are also provided at the end of some tasks and at the end of the exercise to show the expected results.

Additional training resources

Visit the IBM Skills Gateway (www.ibm.com/training/) for details on:

- Instructor-led training in a classroom or online
- Self-paced training that fits your needs and schedule
- Comprehensive curricula, learning journeys, and training paths that help you identify the courses that are right for you
- IBM Professional Certification Program (http://www-03.ibm.com/certify/)
- For other resources that will enhance your success, bookmark the IBM Analytics Skills Gateway (https://www-03.ibm.com/services/learning/ites.wss/zz-en?pageType=page&c=C067650S63836C42)
- Find IBM Case Manager videos and information refer to the IBM Case Manager on Cloud Learning Center (http://ibmtvdemo.edgesuite.net/software/analytics/learning-centers/case-manager-cloud/index.html)

IBM product help

Help type	When to use	Location
Task-oriented	You are working in the product and you need specific task-oriented help.	IBM Knowledge Center https://www.ibm.com/support/knowledgecenter/SSCTJ4_5.3.2/com.ibm.casemgmttoc.doc/casemanager_5.3.2.htm
Books for Printing (.pdf)	You want to use search engines to find information. You can then print out selected pages, a section, or the whole book. Use Step-by-Step online books (.pdf) if you want to know how to complete a task but prefer to read about it in a book. The Step-by-Step online books contain the same information as the online help, but the method of presentation is different.	Start/Programs/*IBM Product*/Documentation
IBM on the Web	You want to access any of the following: • IBM Skills Gateway • Online support • IBM Web site	 • https://www-03.ibm.com/services/learning/ites.wss/zz-en?pageType=page&c=a0011023 • https://www.ibm.com/support/home/ • http://www.ibm.com

Unit 1 Introduction to IBM Case Manager

IBM Training

Introduction to IBM Case Manager

IBM Case Manager V5.3.2

IBM Training

Unit objectives

- Describe the uses of IBM Case Manager
- Identify components of IBM Case Manager

Introduction to IBM Case Manager

Unit objectives

IBM Training

What is case management?

- Case management is the coordination of services on behalf of a party.
- Case management is:
  - driven by outside events
  - human-centric
  - content and process
  - often long-lived
- Case management is NOT:
  - linear
  - predictable
  - automatic

Introduction to IBM Case Manager

What is case management?

Case management was developed because certain business applications that are performed by knowledge workers require a great deal of flexibility, adaptability, control, and collaboration to achieve successful outcomes. Case management is built around the concept of processing a case, which is a collection of information and coordinated activities by knowledge workers or case workers. A person can be considered a case in different settings such as health care, nursing, rehabilitation, social work, disability insurance, employment, and law.

Often the subject of a case is a client or customer, not a product. The workers of the case must use their human faculties and judgments to complete the case to the satisfaction of the client.

A case can continue for months or years before closing.

No single path exists from the beginning of a case to the end. The case is closed when the case handler decides that no more needs to be done with it.

Each case is unique and can involve a different set of tasks.

A case might have some automated steps, but a knowledge/case worker, who decides which tasks must be done, drives the case.

IBM Training

What is a case management solution?

- A case management solution is the application of case management technology to a particular business problem in a particular domain.
- You can use case management solutions in scenarios such as:
  - customer complaint management
  - employee benefits enrollment
  - legal cases for a defendant
  - healthcare claim reimbursement
  - credit card dispute management

Introduction to IBM Case Manager

What is a case management solution?

A case management solution bundles the case information, documents, rules and all the tasks that might be required to solve the business problem.

IBM Training

What makes case management unique?

- Case management:
  - looks at repeatable business problems from the perspective of the knowledge workers
  - empowers the knowledge worker to solve those problems

Introduction to IBM Case Manager

What makes case management unique?

Case solutions are goal-oriented, but a business goal can be achieved in multiple ways, and not all of them can be predetermined. Therefore, case workers require flexibility to decide how the goal will be achieved. The focus of a case management solution is the goal-oriented nature of the problem being solved. All the detailed aspects of the solution work to achieve that goal. Whether it is a rule, a document, a task, or simply a group of data elements, these characteristics all work to help bring the case to its end state.

IBM Training

Case Management versus Business Process Management

Case Management	BPM
The main goal is to optimize case outcomes	The main goal is to optimize efficiency
Focused on why tasks are completed	Focused on how tasks are completed
Relies on knowledge workers to determine when a business goal is reached	Relies on the system to determine when a business goal is reached
More flexible	More efficient
A case consists of pieces that are chosen to fit the situation	A process consists of steps that apply to every situation
Case workers have considerable control over which tasks must be done	knowledge workers have little control over which tasks must be done
Cases are flexible, driven by case workers, development not required	Adding complexity to the workflow design requires development changes

Introduction to IBM Case Manager

Case Management versus Business Process Management

Case Management is related to Business Process Management (BPM), but there are important differences in their organization.

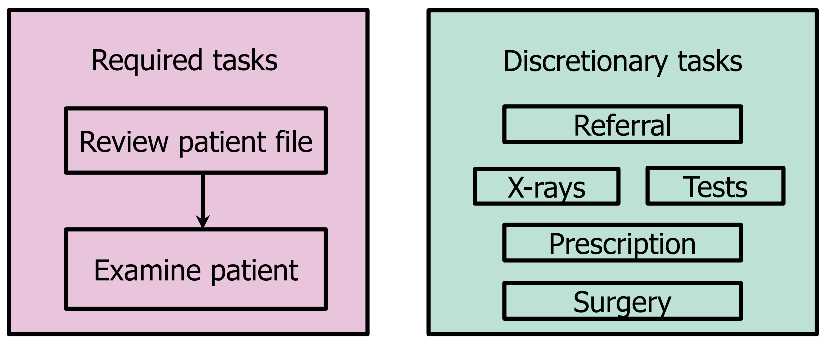
The table lists differences between Case Management and BPM.

If you come from a BPM background, it is important to understand the differences between Case Management and BPM to design efficient case management solutions.

IBM Training

Case management illustration

- A case usually involves:
  - creating a case file
  - following a process to ensure the delivery of services



Tasks that are associated with a visit to a doctor's office

Case management illustration

A case is comprised of tasks.

An example of case management is a visit to a doctor’s office.

The case revolves around the patient.

The case includes a small set of required tasks.

The case also includes a selection of discretionary tasks, which the doctor determines.

The tasks can be completed in any order that makes sense to the doctor.

The case is closed when the doctor and patient agree that all of the required and appropriate discretionary tasks are completed.

IBM Training

What is IBM Case Manager?

- IBM Case Manager is:
  - IBM's implementation of case management
  - a software solution for managing cases
- IBM Case Manager brings together:
  - content
  - process
  - people
- With IBM Case Manager, you can:
  - design/build/deploy a solution
  - handle case management work

Introduction to IBM Case Manager

What is IBM Case Manager?

IBM Case Manager was developed from a need to organize and gain control over business activities that did not fit the BPM workflow paradigm. With IBM Case Manager, you can quickly design, build, and deploy a solution that is flexible enough to handle case management work.

IBM Case Manager uses IBM FileNet Content Manager for managing documents that are part of a case. IBM FileNet Content Manager provides document security, updating capabilities, and automatic event-handling. For example, you can launch a process automatically when a document is added to a document repository.

Content includes:

- content repositories for case-related documents
- metadata
- content-related events

Process includes:

- task routing
- task tracking

People includes:

- knowledge workers or case workers that control the case and determine what tasks to process and it what order
- collaboration

IBM Training

Benefits of IBM Case Manager

- IBM Case Manager provides benefits for case workers, business analysts or solution designers.
- Benefits for case workers:
  - human control of the case flow
  - structure for case work with fewer restrictions
  - 360-degree view of the case
- Benefits for business analysts or solution designers:
  - flexible design characteristics that allow for quick:
    - solution design
    - prototyping
    - deployment
  - capture and reuse business processes
  - options for automation

Introduction to IBM Case Manager

Benefits of IBM Case Manager

IBM Case Manager introduces a new process framework that is more flexible than BPM workflow. This flexibility allows for faster development because the complex decisions can be handled by the case workers instead of the workflow. This flexibility also provides case workers with more freedom to perform case tasks within the case management framework.

IBM Case Manager provides benefits for case workers, business analysts, or solution designers.

Other benefits for case workers are:

- integrated content management
- better customer service
- better regulatory compliance
- case history at a glance
- discretionary and custom tasks

IBM Training

What is an IBM Case Manager Solution?

- An IBM Case Manager Solution is a system of:
  - case types
  - tasks
  - steps
  - other components
- Case workers use a solution to process cases

Introduction to IBM Case Manager

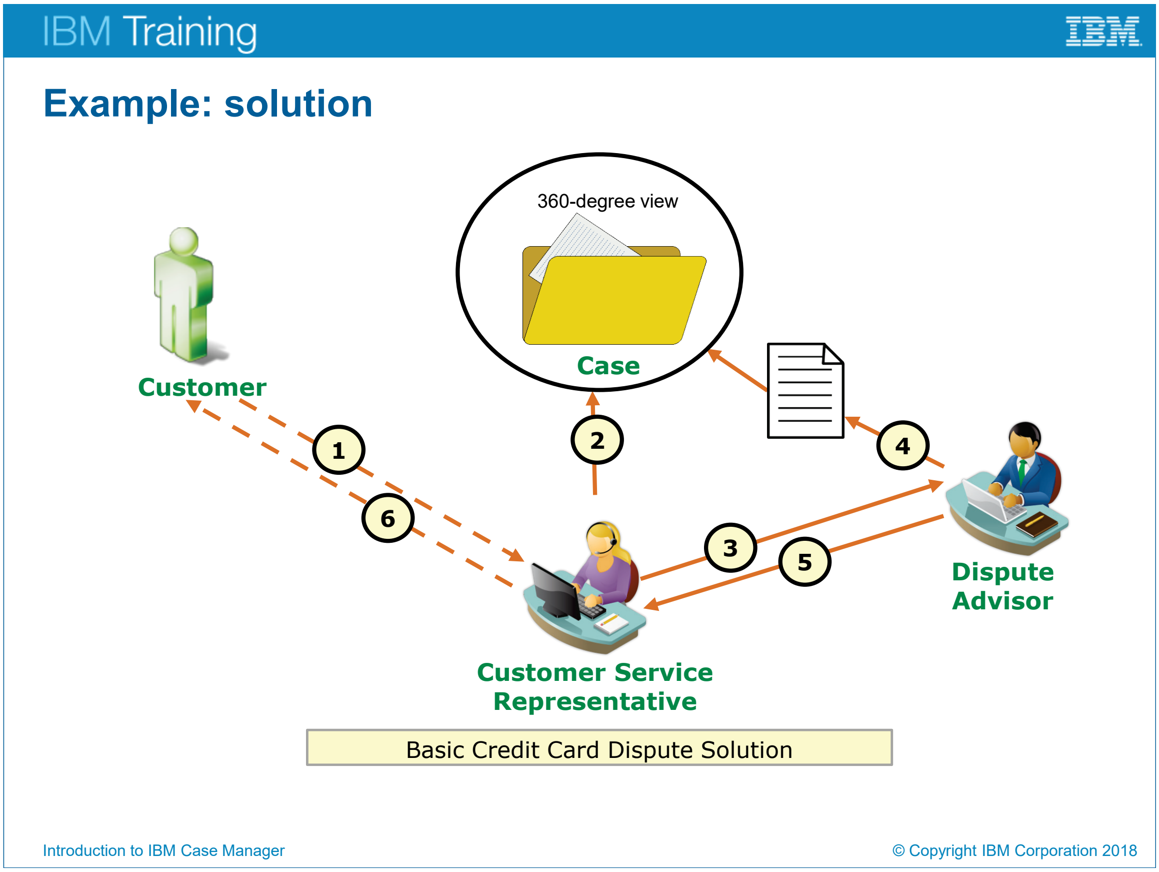
What is an IBM Case Manager Solution?

Solutions are the basis for all case management assets in IBM Case Manager.

A solution is created with IBM Case Manager Builder and then migrated and deployed into production. All case management assets belong to a solution.

Examples of solutions:

- auto insurance claims
- health insurance claims
- loan processing



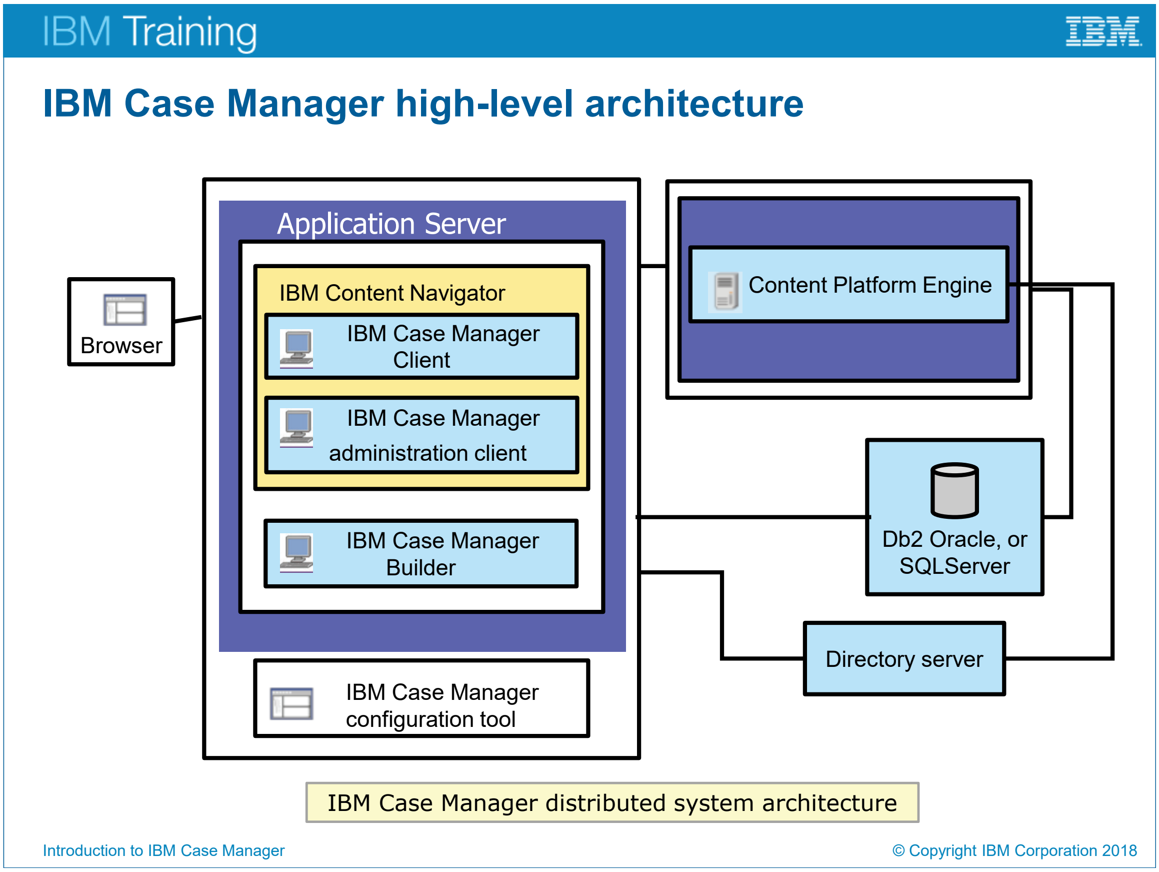
Example: solution

The diagram illustrates the tasks of a basic Credit Card Dispute solution.

1. A Customer calls in and speaks to the Customer Service Representative to report a credit card dispute.

   The diagram shows this step with a dashed line because it is included as an illustration only.
2. The Customer Service Representative creates a case for the customer and adds the dispute information.
3. The Customer Service Representative sends the case to the Dispute Advisor for review.
4. The Dispute Advisor reviews the dispute, and adds the invoice from the credit card transaction to the case.
5. The Dispute Advisor, sets the flag to close the case, and approves the chargeback.
6. The Customer Service Representative communicates with the customer and closes the case.

All the case workers that have access to the case, can view and possibly edit the information for the case. Each case worker has a 360-degree view of the case.



IBM Case Manager high-level architecture

The graphic shows the typical architecture of IBM Case Manager in a distributed development environment.

You can also install IBM Case Manager in a distributed architecture where IBM Case Manager is installed on a separate system from FileNet P8. The IBM Case Manager tools, IBM Case Manager Builder is a Java application that runs on a supported Java application server, such as IBM WebSphere Application Server. IBM Content Navigator is required and must run on the same application server as IBM Case Manager. IBM Case Manager Client and IBM Case Manager administration client are desktop applications built on top of the IBM Content Navigator Framework.

IBM Case Manager requires the Content Platform Engine (Core engine of IBM FileNet Content Manager).

IBM Case Manager can use either DB2, Oracle, or SQL Server as the database and any directory server that FileNet P8 supports.

IBM Training

IBM Case Manager components

- Java application server
- IBM Case Manager Client
- IBM Case Manager Builder
- IBM Content Navigator
- Directory server
- Database engine
- IBM Case Manager administration client
- Content Platform Engine
- IBM Case Manager configuration tool

Introduction to IBM Case Manager

IBM Case Manager components

The list of components that comprise IBM Case Manager are:

- A Java application server which hosts all the Java applications. Several popular application servers, including IBM WebSphere Application Server are supported.
- IBM Case Manager Client is a web-based application that provides the user interface for the case worker. It runs as an IBM Content Navigator desktop.
- IBM Case Manager Builder is a web-based application that provides the design interface for IBM Case Manager solutions.
- IBM Content Navigator is a framework that provides a common look and feel to user interfaces.
- Directory server is any LDAP directory server that FileNet P8 Platform (IBM FileNet Content Manager) supports.
- Database engine provides the databases that are used by the Content Platform Engine, IBM Case Manager, IBM Content Navigator and any other repository stores. Oracle, IBM Db2 and Microsoft SQL Server are supported.

- IBM Case Manager administration client is an application that administrators use for configuring and administering IBM Case Manager.
- Content Platform Engine provides the design and target repositories that store the solution assets and runtime cases and documents. Content Platform Engine also provides workflow capabilities, such as routing and business logic.

Apply your knowledge

Use the questions in this section to test your knowledge of the course material. For each question, indicate the correct answer or the best answer.

Question1: Which component provides the user interface for processing case work?

A. IBM Case Manager Builder
B. IBM Content Navigator
C. Content Platform Engine
D. IBM Case Manager Client

Question 2: Which component provides the user interface for creating Case Management solutions?

A. IBM Case Manager Builder
B. IBM Case Manager administration client
C. Content Platform Engine
D. IBM Case Manager Client

Question 3: Which component provides the user interface for configuring the Case Management environment?

A. IBM Case Manager Builder
B. IBM Content Navigator
C. IBM Case Manager administration client
D. IBM Case Manager Client

Question 4: Why is it expensive to model Case Management with a BPM system?

A. BPM systems are expensive.
B. Adding complexity to a workflow adds to development costs.
C. Workflow designers are paid more than business analysts.
D. BPM systems are not designed for efficiency.

Question 5: IBM Case Manager provides benefits for?

A. Case workers, solution designers, and developers
B. Business analysts, solution builders, and developers
C. Administrators, case workers, and business analytics
D. Case workers, business analysts and solution designers

Question 6: The main goal of case management is to optimize efficiency? (True or False)

Answers to questions

Answer 1: D. IBM Case Manager Client

Answer 2: A. IBM Case Manager Builder

Answer 3: C. IBM Case Manager administration client

Answer 4: B. Adding complexity to a workflow adds to development costs

Answer 5: D. Case workers, business analysts and solution designers

Answer 6: False

IBM Training

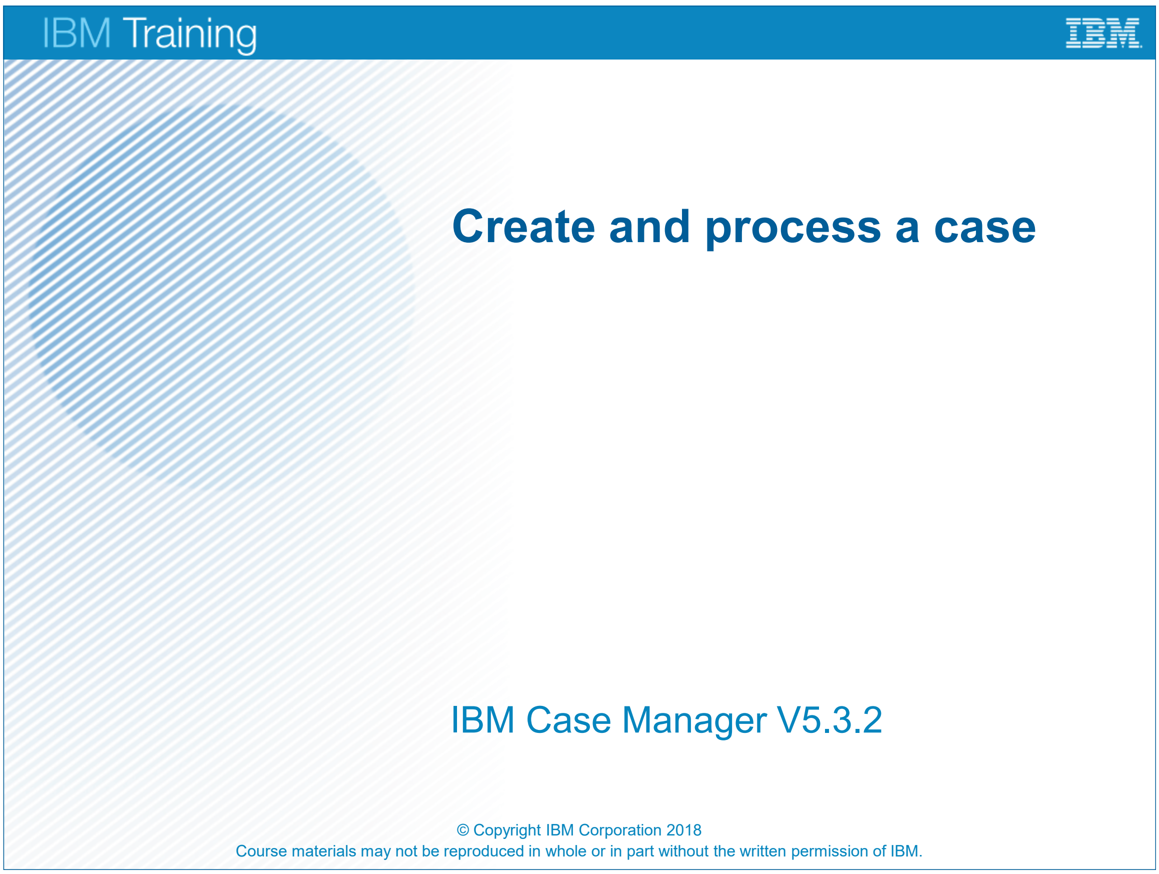
Unit summary

- Describe the uses of IBM Case Manager
- Identify components of IBM Case Manager

Introduction to IBM Case Manager

Unit summary

Unit 2 Create and process a case



IBM Training

Unit objectives

- Identify a case
- List the components of a case type
- Describe the IBM Case Manager Client
- Add a case and process a work item

Create and process a case

Unit objectives

IBM Training

What is a case?

- A case is an instance of a case type.
- A case type contains objects used to solve a business problem, such as:
  - tasks
  - document class
  - steps
  - roles
  - properties

Create and process a case

What is a case?

A case type is a template of a case. An example of a case type is a loan application. An instance of a loan application is the loan application of a client. The loan application contains detailed information such as correspondence, tasks, policies, and events that case workers collaborate on to resolve the case.

IBM Training

Components of a Case type

Component	Definition	Example
Task	A series of steps that are designed to achieve a goal	Process a loan
Task step	A single unit of work that is used to complete a task	Review a loan application
Property	A field that contains data about a case	Loan amount
Document class	A class of documents that is typically used in a case type	A loan application
Rule	An instruction to execute if certain conditions are met	If the loan amount > $5000, get manager approval

Create and process a case

Components of a Case type

A case type can include tasks, task steps, properties, document class, and rules. The table lists the possible case type components, a definition for each component, and an example.

IBM Training

What is a role?

- A role defines and groups case workers by the type of work that they do. Some example roles:
  - Loan Officer
  - Insurance Underwriter
  - Customer Service Representative
- Associate roles with steps in the tasks of a solution.

Create and process a case

What is a role?

To use IBM Case Manager Client to process cases, a user must belong to a role that is defined in the solution.

A solution builder defines roles for your solution.

Roles are defined at the solution level. You can reuse roles across all case types, or you can create a role that is applied only to a specific case type. When you create tasks or steps, you can assign roles to the task or step from roles that are already defined for the solution, or you can create a new role for the solution.

After you create and deploy the solution, you assign users and groups, to the roles.

The roles define which in-baskets case workers see when they are processing a case.

IBM Training

IBM Case Manager tools

- IBM Case Manager includes the following tools:
  - IBM Case Manager Client
  - IBM Case Manager Builder
  - IBM Case Manager administration client
  - IBM Case Manager configuration tool

Create and process a case

IBM Case Manager tools

IBM Case Manager includes the following tools for development environments:

- IBM Case Manager Client is used by case workers to process cases.
- IBM Case Manager Builder is used by solution builders to design and develop solutions to resolve business problems.
- IBM Case Manager administration client is used by administrators and solution builders to manage the case management system, during regular operations.
- IBM Case Manager configuration tool is used by administrators to do one-time configuration tasks. For example, setting up a new case management system or adding new features to an existing system.

This course focuses on IBM Case Manager Client, which is the tool that is used by the case workers.

IBM Training

What is IBM Case Manager Client?

- The IBM Case Manager Client is:
  - a web-based user interface (UI)
  - presented as a widgets application organized in pages
  - used by case workers to complete their case work
  - customizable

Create and process a case

What is IBM Case Manager Client?

IBM Case Manager Client is a web-based application that provides the user interface (UI) for case workers to process cases.

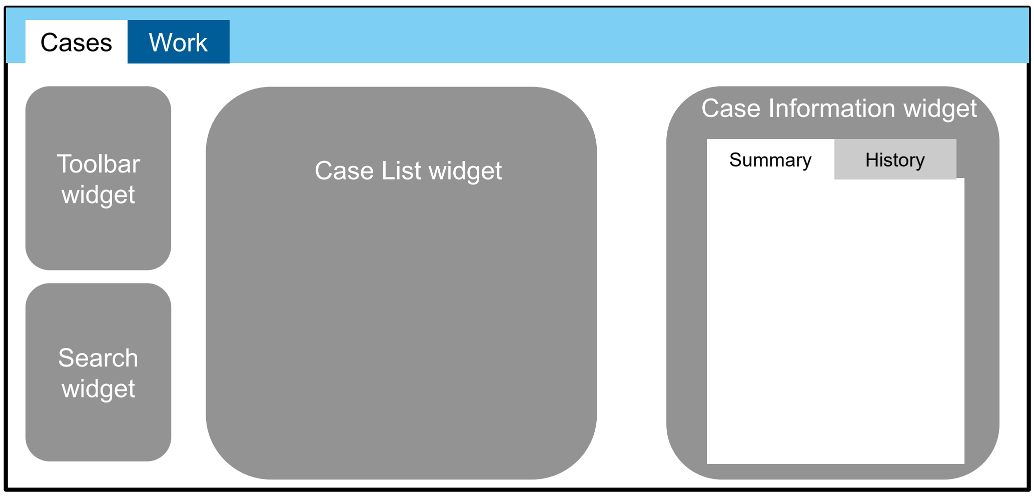
IBM Case Manager Client is a widgets application with a set of pages that are configured to work together, enabling case workers to manage cases and process work items.

IBM Case Manager Client is highly customizable. A solution builder, designs the views and in-baskets for IBM Case Manager Client. Solution builders can use the default pages and widgets, or they can customize IBM Case Manager Client by adding more pages or widgets or copying and modifying the default pages and widgets.

IBM Training

How does IBM Case Manager Client use widgets and pages?

- IBM Case Manager Client uses widgets to provide case workers with information and controls needed to work on a case.



Create and process a case

How does IBM Case Manager Client use widgets and pages?

Widgets are portable and reusable components that are used in web pages to manage content and process work items.

A page consists of a layout, widget configurations, and the communication between different widgets (the flow of events). For example, a loan officer might create and submit loan requests and notify customers when a decision is reached. So you add a page to create and submit loan requests.

The graphic shows how the widgets are laid out on the default Cases page. The Cases page is considered a solution page, which provides case workers with access to cases that are in a solution. The Cases page is used by case workers to search for cases and interact with them. When a user first opens the Cases page, the Case Information widget is hidden until the user selects a case.

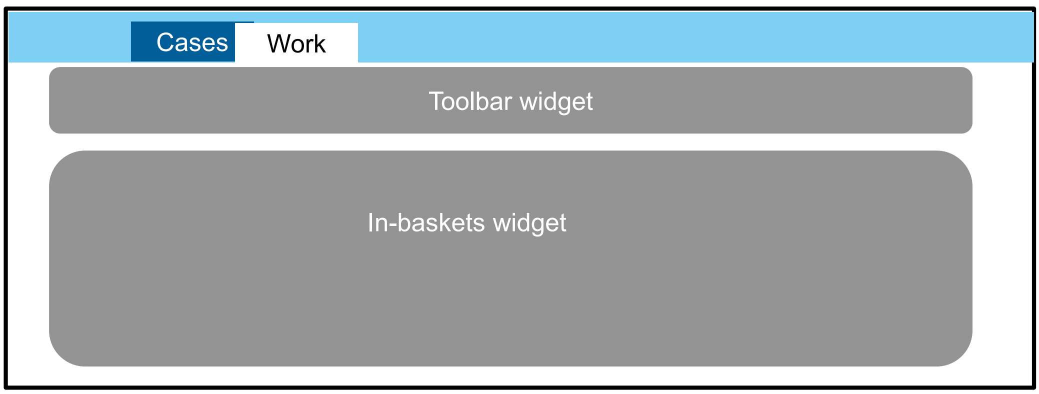
A solution builder can customize any of the pages as part of the solution design.

The demonstrations and exercises in this course primarily use the default pages. Your system might have pages that look differently.

IBM Training

Using the Work page

- The Work page is used for:
  - creating new cases
  - finding cases that are waiting to be processed
  - selecting the role for the In-basket that they want to process



Create and process a case

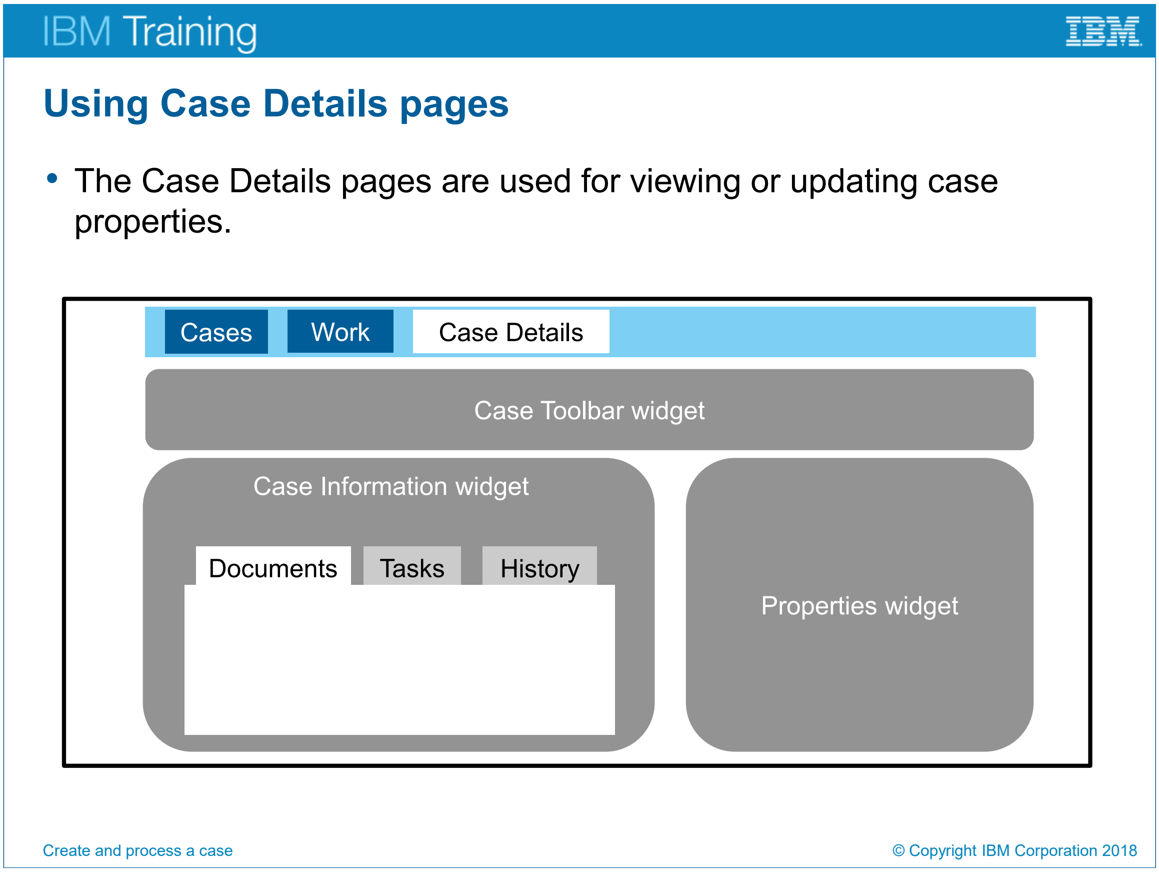
Using the Work page

The Work page is also a solution page. A case worker typically uses the Work page to create new cases, and access the in-baskets to view assigned work items.

By default, the Toolbar widget includes the Manage Roles and Add Case buttons.

The purpose of the Manage Roles button, is to assign users and groups to roles. This button is generally configured to display for supervisors or administrative roles.

The purpose of the Add Case button is to add a case instance of a specific case type.



Using Case Details pages

The Case Details pages are used by case workers to interact with specific cases. Case workers use the Case Details page to perform many case tasks, such as reviewing case history, adding or viewing documents, and adding tasks.

By default, the Case Details pages display when open a case.

By default, the Case Information widget shows:

- the documents that are attached to the case
- the tasks that completed, are processing, or are ready to start
- the history of the case

The Properties widget lists the properties of the case and their values.

The Case Toolbar widget includes the following buttons: *Add Custom Task*, *Add Task*, *Close*, *Comments*, *Create Package*, *Save*, and *Split Case*.

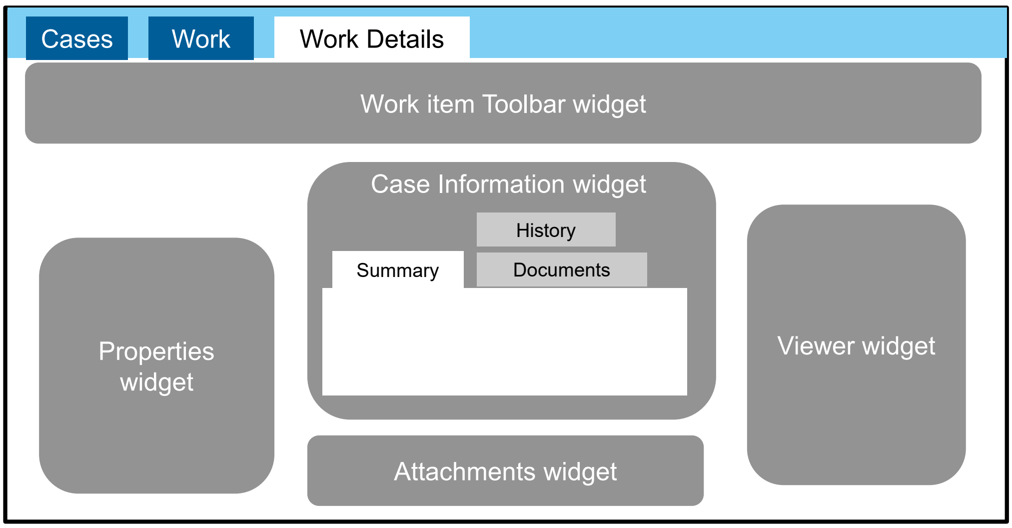
IBM Case Manager provides two default Case Details pages: the *Case Details page*, and the *Case Details Form page*.

The diagram shows the default Case Details page layout with the widgets that are included. The Case Details Form page looks the same, except that the Form widget is used to view and update the case properties, instead of the Properties widget.

IBM Training

Using Work Details pages

- The Work Details page includes step pages that display when a case worker opens a work item.



Create and process a case

Using Work Details pages

The Work Details pages are used by case workers to complete the work items that are assigned to them. The Work Details Pages open when you open a work item that is in an in-basket. The Work Details pages contain widgets to help you process a step in a case.

IBM Case Manager provides three default Work Details pages:

- Work Details page (for working on a work item)
- Work Details Form page (for working on a work item by using a form)
- Form Attachment Work Details page (for working on a form-based work item).

The diagram shows how the widgets are laid out on the default Work Details page.

Prepare your environment

Start IBM Case Manager components

The environment that is provided with this course requires that you start the IBM WebSphere Application servers that host the IBM Case Manager components. The WebSphere Admin folder, found on the desktop, includes the scripts that you need to run to start the components:

1. On the desktop, open the **WebSphere Admin** folder.
2. Right-click **_1 Start server1.bat**, and then select **Run as administrator**.
   Wait for the command window to close.
3. Right-click **_2 Start ICNserver.bat**, and then select **Run as administrator**.
   Wait for the command window to close.
4. Verify that IBM Case Manager is operational.
   - Open a Mozilla Firefox browser window.
   - On the Course Portal Links page, under **System Health**, click **Case Manager Ping**.
   - Log in as `p8admin`/`FileNet1`.
   - The **IBM Case Manager Context (Ping Page)** is displayed. You see a two-column table with information like: Product name, Case Management Build, and Operating System.
   - Close the browser window.

Troubleshooting

If you do not see the IBM Case Manager Context (Ping Page), verify that the following two services are running:

- IBM WebSphere Application Server V9.0 - Dmgr
- IBM WebSphere Application Server V9.0 - Node01

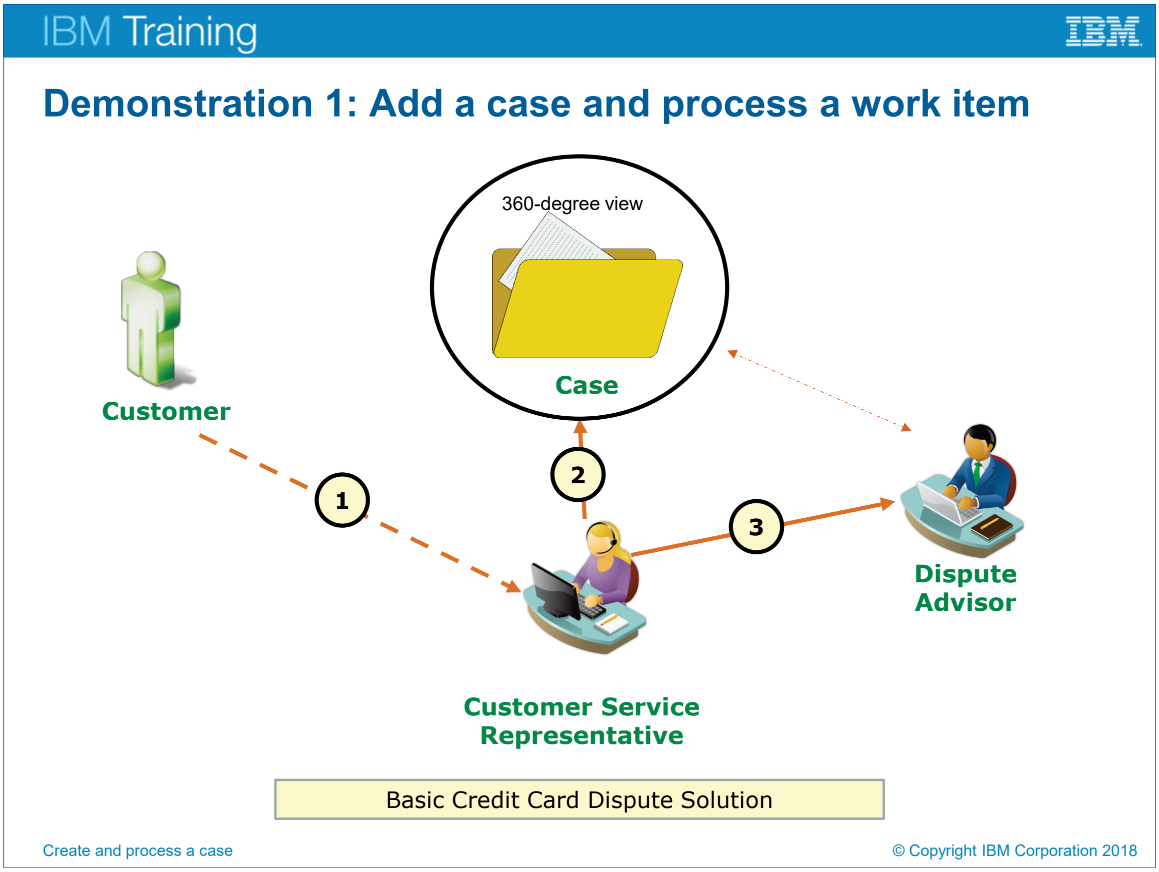
  Stop and start the components.

  In the WebSphere Admin folder, stop the two application servers and restart them. The steps are:

  - Right-click **_3 Stop ICNserver.bat** and then select **Run as administrator**. Wait for the command window to close.
  - Right-click **_4 Stop server1.bat** and then select **Run as administrator**. Wait for the command window to close.

- Right-click **_1 Start server1.bat** and then select **Run as administrator**. Wait for the command window to close.
- Right-click **_2 Start ICNserver.bat** and then select **Run as administrator**. Wait for the command window to close.

Do not start the next script until the command window closes for the previous script. Verify that IBM Case Manager is operational.



Demonstration 1: Add a case and process a work item

The diagram illustrates the first three steps of the basic Credit Card Dispute solution. In this demonstration, you use IBM Case Manager Client to complete steps 2 and 3.

1. A Customer calls in and speaks to the Customer Service Representative to report a credit card dispute.

   The diagram shows this step with a dashed line because it is included as an illustration only.
2. The Customer Service Representative creates a case for the customer, and adds the dispute information.
3. The Customer Service Representative sends the case to the Dispute Advisor for review.

Demonstration 1: Add a case and process a work item

Purpose:
A customer is disputing a credit card transaction. As the Customer Service Representative, you create and start to process a credit card dispute case for the customer.

Before you do the demonstrations in this course, you need to need to ensure that the IBM Case Manager components in your environment have been started. To do this, follow the steps in the **Prepare your environment** section, on page 2-13.

Task 1. Add a case.

1. Open a Mozilla Firefox browser window.
2. On the **Course Portal** links page, click the **Case Client** link to open IBM Case Manager Client.
3. Log in as the **Customer Service Representative**.
   - User name: `Addington`, password: `FileNet1`
4. Click **Add Case**, and then select **Manage Dispute Item**.
   This creates a case of Manage Dispute item case type.
5. In the **Customer Name** field, type `John Jacobs` and then click **Add**, on the upper right.

Task 2. Process a work item.

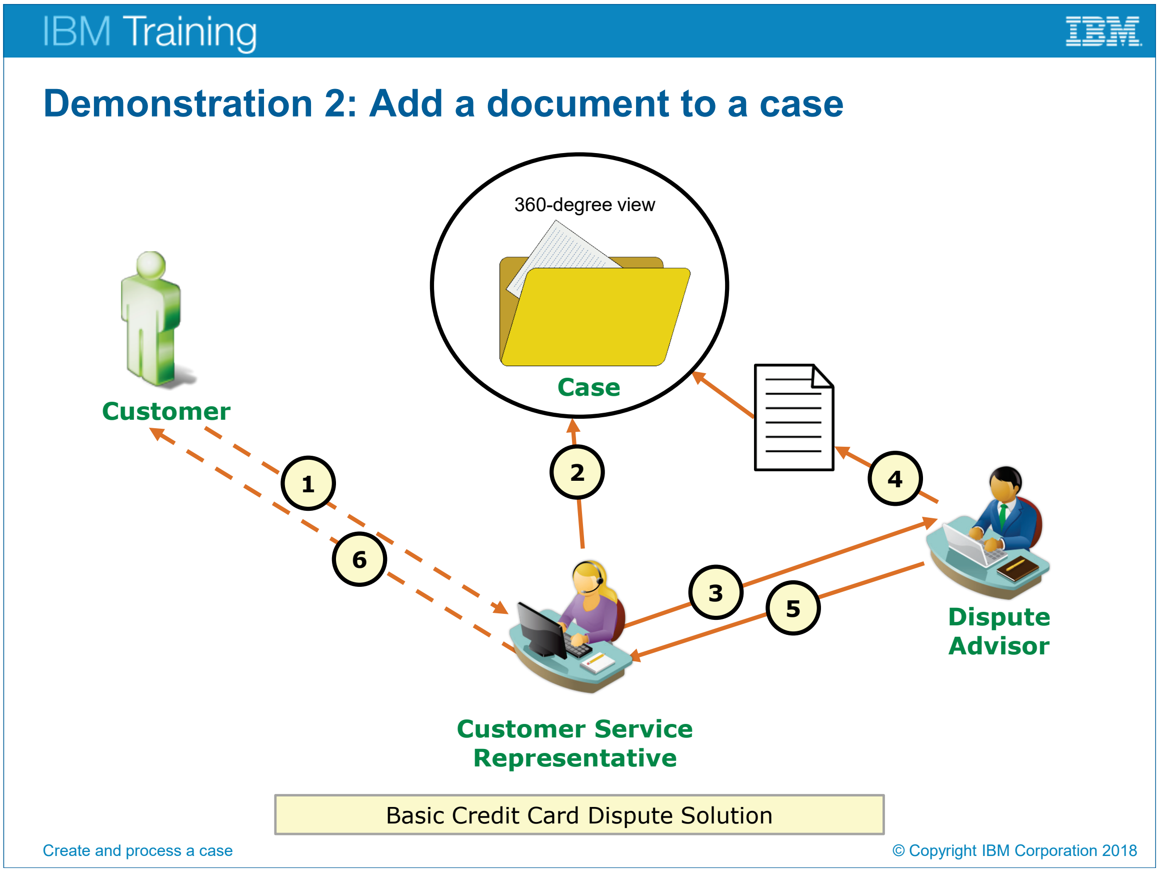
To process a work item, you open a work item from your in-basket.

1. Click the **Work** tab, on the upper-left, to see your in-basket.
2. Click the **Gather Dispute Information** step to open the work item.
3. Add the following information about the customer:
   - Credit Card Number: `1234-3445-3333-7777`
   - Contact Phone Number: `232-333-4444`
   - Dispute Description: `Never received product`
   - Dispute Amount: `125.00`
   - Merchant Name: `ACME`

4. Choose the option **Send to Dispute Advisor**.
5. Log out of IBM Case Manager Client.

   Click **Addington** on the upper right corner, and then select **Log Out**.

Results:
As the Customer Service Representative, you created and started to process a credit card dispute case for a customer that reported a dispute, on a credit card transaction.



Demonstration 2: Add a document to a case

The diagram illustrates steps 1 to 6 of the basic Credit Card Dispute solution. In this demonstration, you use IBM Case Manager Client to continue processing the case, and complete steps 4 to 6. You log on as different users to assume different roles.

1. A Customer calls in and speaks to the Customer Service Representative to report a credit card dispute.
2. The Customer Service Representative creates a case for the customer and adds the dispute information.
3. The Customer Service Representative sends the case to the Dispute Advisor for review.
4. The Dispute Advisor reviews the dispute, and adds the invoice from the credit card transaction to the case.
5. The Dispute Advisor, sets the flag to close the case, and approves the chargeback.

   When the Dispute Advisor sets the flag to close the case, a Close Case task is automatically started which creates a work item for the Customer Service Representative.
6. The Customer Service Representative communicates with the customer and closes the case.

Demonstration 2: Add a document to a case

Purpose:

As the Dispute Advisor, you find a Review Dispute work item in your in-basket and open it. After reviewing the dispute information, you add an invoice to the case. You set a flag to close the case and approve the charge back. As the Customer Service Representative, you complete the case.

Task 1. Add a document to a case.

1. In IBM Case Manager Client, log in as the Dispute Advisor.
   - User name: **`Sue`**, password: **`FileNet1`**
2. Click the **Work** tab to view the **Dispute Advisor** in-basket.
3. Click the **Review Dispute** step to open the work item.

   The Dispute Advisor reviews the customer's credit card account, and adds a copy of the invoice.
4. On the right, click **Supporting Documents** to add the invoice to that folder.
5. Click **Add** > **Add Document from Local System**.
6. Click **Browse**.
7. Browse to **C:\Training\F2900** folder, select **ACME invoice 1234.pdf**, and click **Open**.
8. On the lower right corner, click **Add**.

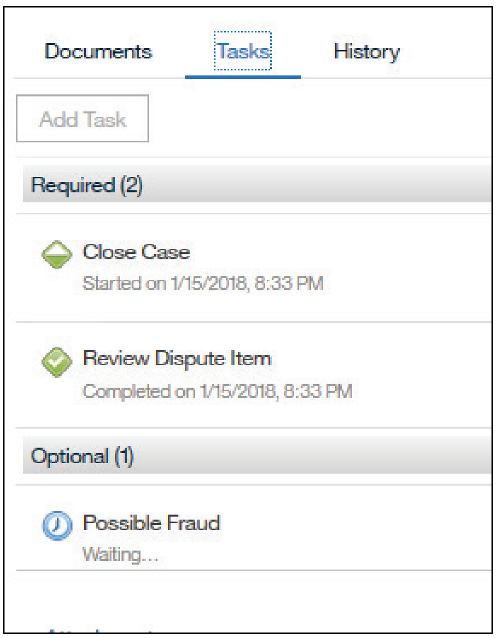
   The Dispute advisor marks the case to close and approves the charge back.
9. On the left, scroll down to the **Flags** section and select **Close the case**.
10. On the right, choose the option **Charge back Approved**.
11. Log out of IBM Case Manager Client.

    When you are processing a work item, if you cannot complete the step, you can save and close the step. You can come back later and continue working where you left off. If you are authorized, you can reassign the step to someone else. The reassigned step is moved to the recipient's personal in-basket, instead of the Work in-basket.

Task 2. Customer Service Representative completes the case.

1. Log in as **`Addington/FileNet1`** to IBM Case Manager Client.
2. In the **Work** tab, under the **Customer Service Representative** in-basket, open the **Communicate with Customer** step.
3. Click **Tasks** tab in the main screen, to review the Tasks.

   The results appear as follows:

   The Close Case task is processing. The Review Dispute Disputed Item task is complete. The Possible Fraud task is optional and waiting, which means it is available to start if necessary.
4. Click **Complete**.
5. Log out of IBM Case Manager Client.

Results:
As the Dispute Advisor, you opened a Review Dispute work-item. After reviewing the dispute information, you added an invoice to the case. You set a flag to close the case and approved the charge back. As the Customer Service Representative, you completed the case.

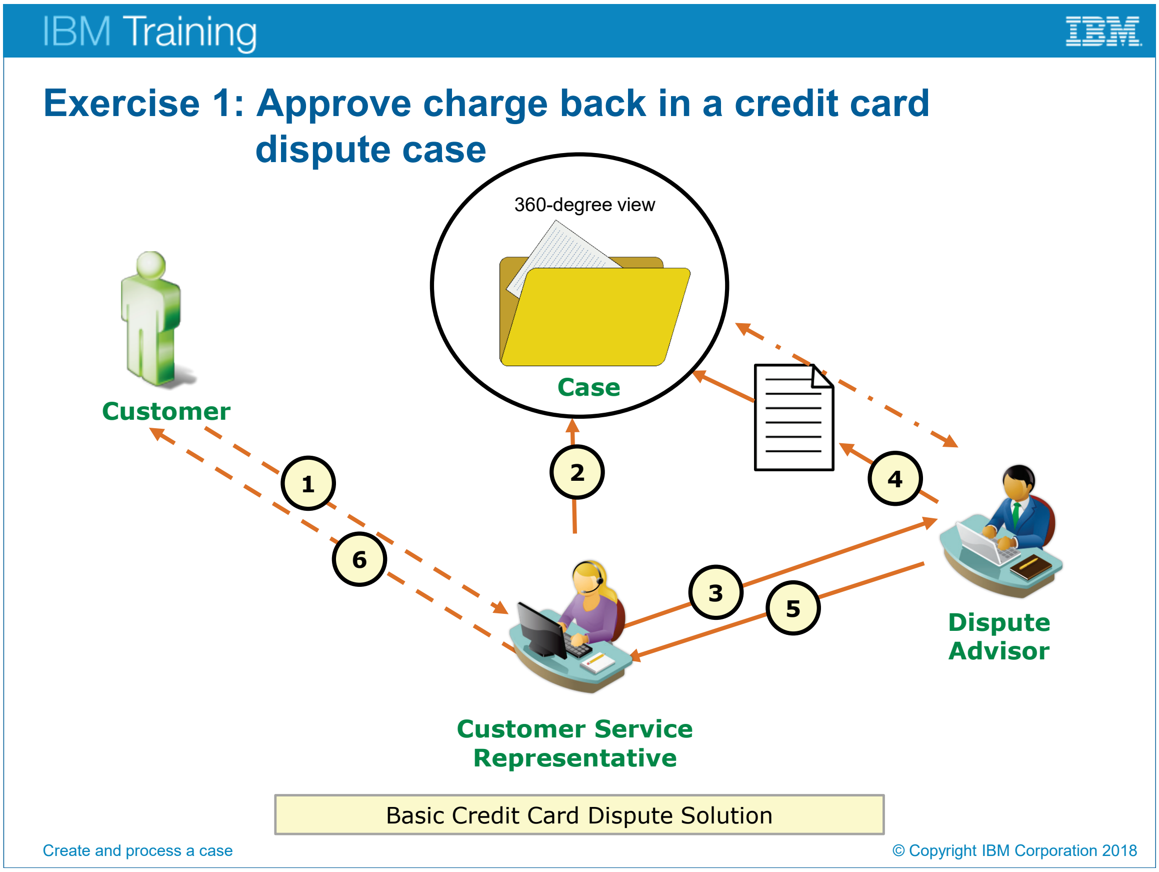
IBM Training

Unit summary

- Identify a case
- List the components of a case type
- Describe the IBM Case Manager Client
- Add a case and process a work item

Create and process a case

Unit summary



Exercise 1: Approve charge back in a credit card dispute case

The diagram illustrates steps 1 to 6 of the basic Credit Card Dispute solution.

In this exercise, you use IBM Case Manager Client to complete steps 2 to 6. You log on as different users to assume the different roles, so you can see how the case moves from one task to another.

1. A Customer calls in and speaks to the Customer Service Representative to report a credit card dispute.

   The diagram shows this step with a dashed line because it is included as an illustration only.
2. The Customer Service Representative creates a case for the customer and adds the dispute information.
3. The Customer Service Representative sends the case to the Dispute Advisor for review.
4. The Dispute Advisor reviews the dispute, and adds the invoice from the credit card transaction to the case.

5. The Dispute Advisor, sets the flag to close the case, and approves the chargeback.
6. The Customer Service Representative communicates with the customer and closes the case.

   The diagram shows this step with a dashed line, because you do not communicate with the customer. The step is included as an illustration only.

Exercise 1:
Approve charge back in a credit card dispute case

A customer, named Jane Good, contacts a Customer Service Representative with a credit card dispute. The customer provides the following dispute information:

- Credit Card Number: **`2222-3333-4444-5555`**
- Contact Phone Number: **`222-333-4444`**
- Dispute Description: **`Merchant double charged`**
- Dispute Amount: **`85.00`**
- Merchant Name: **`ACME`**

The Customer Service Representative creates a case for the customer. After entering the dispute information, the Customer Service Representative sends the case to the Dispute Advisor. The Dispute Advisor, reviews the customer's credit card account and completes the following steps:

- verifies the double charge
- sets the Close the case flag
- chooses Charge back Approved

The Customer Service Representative opens the *Communicate with Customer* step. The representative communicates with the customer and completes the case.

User credentials:

- Customer Service Representative: **`Addington/FileNet1`**
- Dispute Advisor: **`Sue/FileNet1`**

IBM Case Manager Client URL:

- http://vclassbase:9081/navigator/?desktop=icm

Exercise 1: Tasks and results

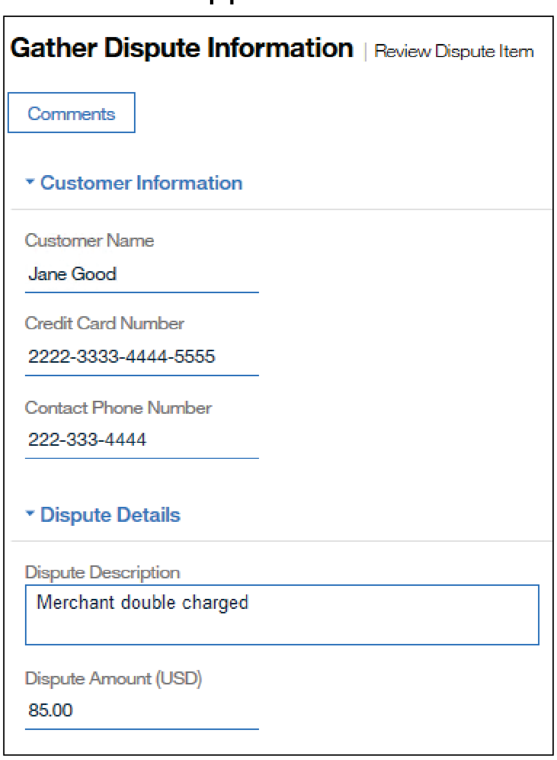
The IBM Case Manager components must be started before you can complete the exercises in this course. If you have not already started the components, follow the steps in the **Prepare your environment** section, on page 2-13.

Task 1. Add a case of case type, Manage Dispute Item.

- Open IBM Case Manager Client.
- Log in as **`Addington/FileNet1`**.
- Add a case of case type, **Manage Dispute Item**.
- For **Customer Name**, type **`Jane Good`** and then click **Add**.
- Click the **Work** tab, and then open the **Gather Dispute Information** step.

  If you have more than one step that is listed, choose the one with the most recent time stamp.
- Enter the dispute information, provided in the exercise introduction.

  The results appear as follows:



- Click **Send to Dispute Advisor**.
- Log out of IBM Case Manager Client.

Task 2. Dispute Advisor accepts the charge back.

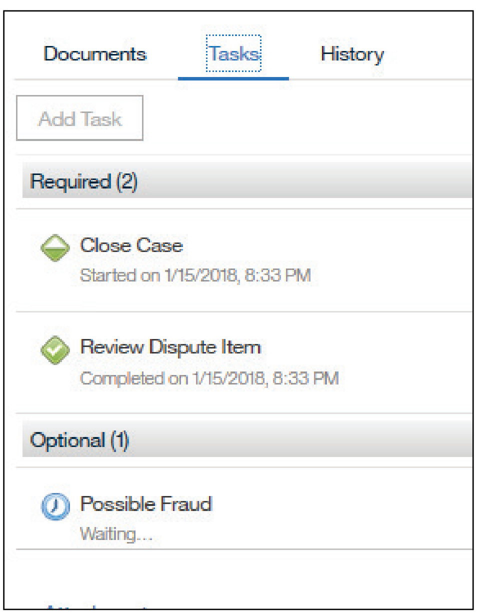
- Log in as **`Sue`**/**`FileNet1`** to IBM Case Manager Client.
- Click the **Work** tab, and then open the **Review Dispute** step.
- Set the **Close the case** flag.

  Setting this flag automatically starts the Close Case task.
- Select **Charge Back Approved**.
- Log out of IBM Case Manager Client.

Task 3. Customer Service Representative completes the case.

- Log in as **`Addington`**/**`FileNet1`** to IBM Case Manager Client.
- In the **Work** tab, open the **Communicate with Customer** step.
- Review the Tasks.

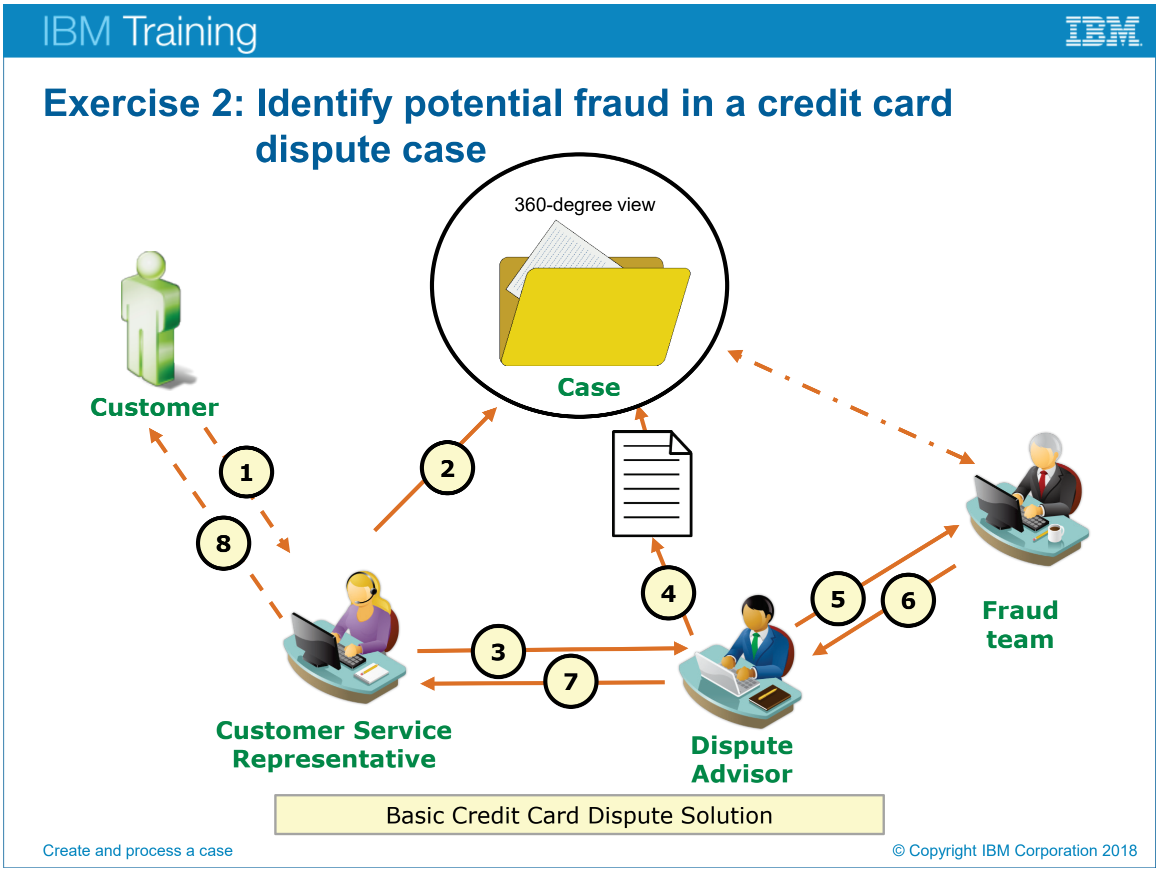
  The results appear as follows:



The Close Case task is processing. The Review Dispute Item task is complete. The Possible Fraud task, is optional and waiting, which means it is ready to start when needed.

- Click **Complete**.
- Log out of IBM Case Manager Client.

At the end of the exercise, the Communicate with customer step, that you opened, is no longer listed in the Customer Service Representative's in-basket.



Exercise 2: Identify potential fraud in a credit card dispute case

The diagram illustrates the steps of the basic Credit Card Dispute solution. The diagram shows the optional route where the Dispute Advisor sends the dispute to the Fraud team to investigate a possible fraud; step 5.

In this exercise, you use IBM Case Manager Client to complete steps 2 to 8. You log on as different users to assume the different roles.

1. A Customer calls in and speaks to the Customer Service Representative to report a credit card transaction dispute.
2. The Customer Service Representative creates a case for the customer and adds the dispute information.
3. The Customer Service Representative sends the case to the Dispute Advisor for review.
4. The Dispute Advisor reviews the dispute, and adds the invoice from the credit card transaction to the case.
5. The Dispute Advisor, sets the potential fraud flag, and chooses the option Possible Fraud.

6. A member of the Fraud team reviews the dispute case, adds a comment that no fraud exists and clears the potential fraud flag.
7. The Dispute Advisor reviews the comment from the Fraud team, sets the close case flag, and completes the work item.
8. The Customer Service Representative communicates with the customer and completes the case.

Exercise 2: Identify potential fraud in a credit card dispute case

A customer, named Jerry Sprouts, contacts the Customer Service Representative with a credit card transaction dispute. The customer provides the following dispute information:

- Credit Card Number: **`3333-4444-5555-6666`**
- Contact Phone Number: **`333-444-5555`**
- Dispute Description: **`Item was broken upon arrival`**
- Dispute Amount: **`200.00`**
- Merchant Name: **`Tiny Toy Company`**

The Customer Service Representative creates a case for the customer. After entering the dispute information, the Customer Service Representative sends the case to the Dispute Advisor. The Dispute Advisor reviews the customer's credit card account, and sees some suspicious items. The Dispute Advisor sets the Potential_Fraud flag and selects the Possible Fraud option to send the case to the Fraud Team.

A member of the Fraud Team sees a step in their in-basket to investigate possible fraud. They open the work item and review the case. When the investigation is complete, they add a comment to the case; **`I completed my investigation and do not see fraud.`** The Potential_Fraud flag is cleared, and the No Fraud option is selected.

The Dispute Advisor opens the Fraud Investigation Results step and reads the comment from the Fraud team. The Dispute Advisor sets the flag to close the case and completes the work item.

The Customer Service Representative opens the Communicate with Customer step. The Customer Service Representative completes the case.

User credentials:

- Customer Service Representative: **`Addington/FileNet1`**
- Dispute Advisor: **`Sue/FileNet1`**
- Fraud Team member: **`Fred/FileNet1`**

IBM Case Manager Client URL:

- http://vclassbase:9081/navigator/?desktop=icm

Exercise 2: Tasks and results

Task 1. Add a case of case type, Manage Dispute Item.

As the Customer Service Representative, you add a credit card dispute case for the customer, Jerry Sprouts.

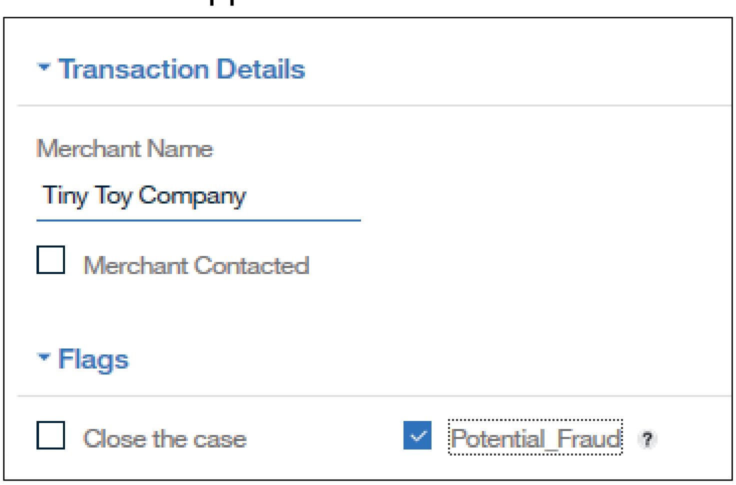
- In IBM Case Manager Client, log in as, `Addington/FileNet1`.
- Add a case of case type, **Manage Dispute Item**.
- In the **Customer Name** field, type `Jerry Sprouts`.
- Click **Add**.
- Click the **Work** tab and open the step **Gather Dispute Information**.

  If you have more than one, choose the one with the most recent time stamp.
- Enter the dispute information, provided in the exercise introduction, and send the case to the Dispute Advisor.
- Log out.

Task 2. Dispute Advisor identifies a possible fraud.

- Log in as `Sue/FileNet1` to IBM Case Manager Client.
- Click the **Work** tab and open the **Review Dispute** step.
- Set the flag, **Potential_Fraud**.

  The results appear as follows:

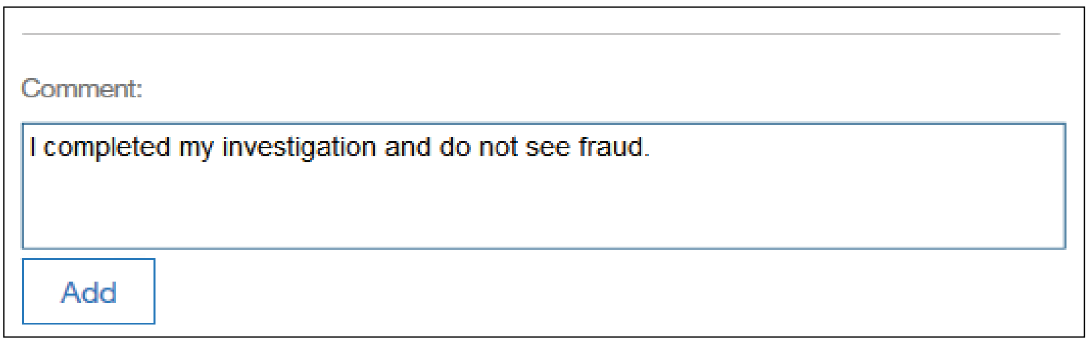
  Setting the Potential_Fraud flag triggers the Potential Fraud task to start.
- Click **Possible Fraud** on the upper right corner of the page.
- Log out.

Task 3. The Fraud team finds no fraud.

- Log in as **`Fred`**/**`FileNet1`** to IBM Case Manager Client.

  Fred is a member of the Fraud team.
- In the **Work** tab, open the **Investigate possible fraud** step.
- Click the **Comments** on the upper left, and then type, **`I completed my investigation and do not see fraud.`**

  The results appear as follows:



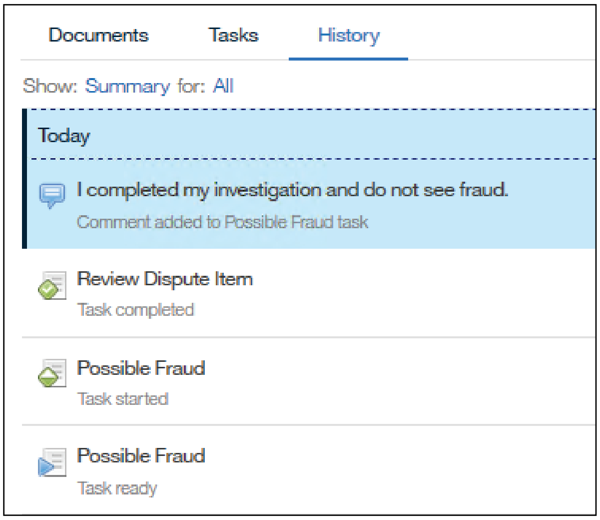
- Click **Add**, and then click **Close**.
- Clear the **Potential_Fraud** flag.
- Select the **No fraud** option.
- Log out.

Task 4. The Dispute Advisor completes the Fraud Investigation Results step.

- Log in as **`Sue`**/**`FileNet1`** to IBM Case Manager Client.
- In the **Work** tab, open the **Fraud Investigation Results** step.
- Review the comment added by the fraud team.

- Select the **History** tab to see the comment.

  The results appear as follows:



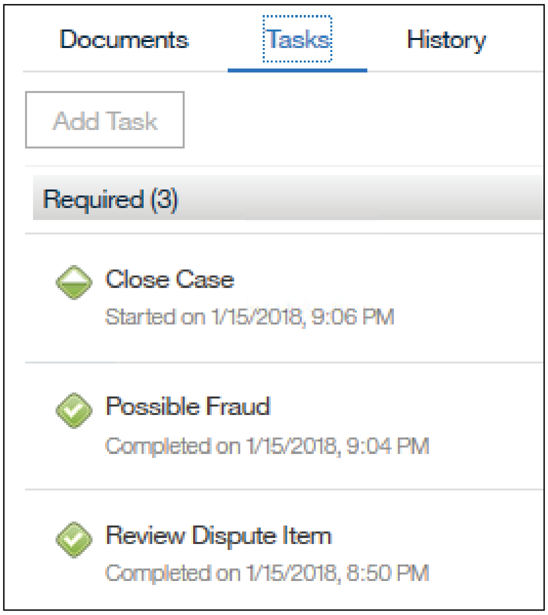
- Set the **Close the case** flag.
- Click **Complete**.
- Log out.

Task 5. Customer Service Representative completes the case.

- In IBM Case Manager Client, log in as **`Addington/FileNet1`**.
- In the **Work** tab, open the **Communicate with Customer** step.

- Select the **Tasks** tab.

  The results appear as follows:

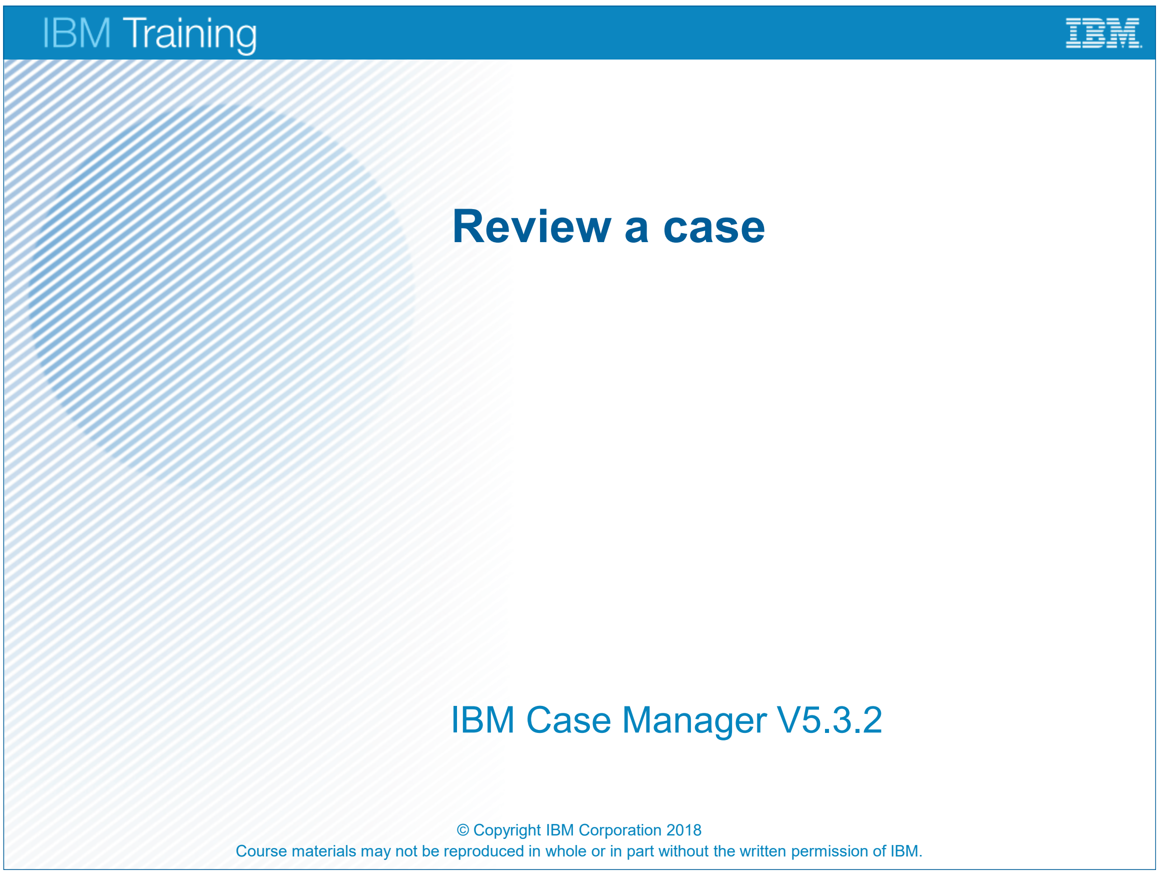


  In the Tasks list, you see that two tasks are complete, Possible Fraud and Review Dispute Item. The Close Case task is processing.

- Click **Complete**.
- Log out.
- Close the **browser window**.

At the end of the exercise, the Communicate with Customer step that you opened is no longer listed in the Customer Service Representative's in-basket.

Unit 3 Review a case



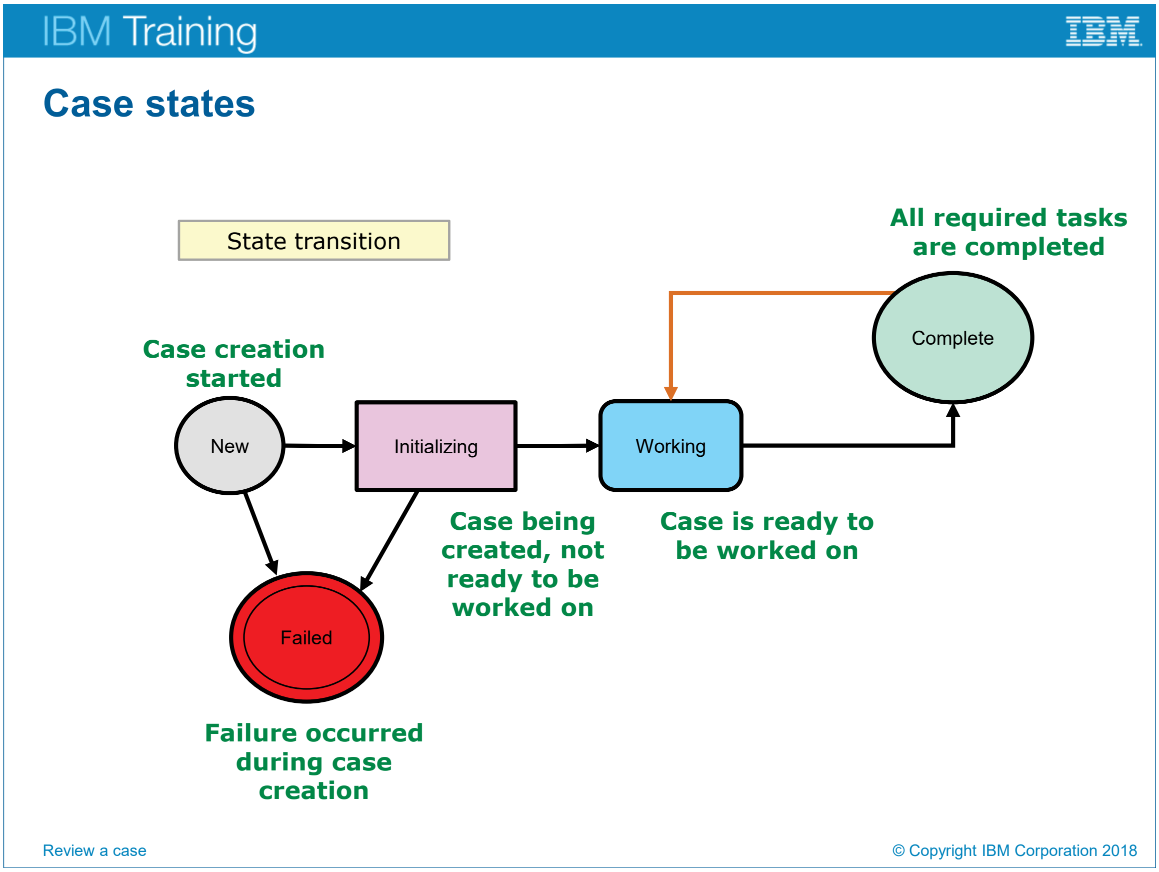
IBM Training

Unit objectives

- Search for a case
- Review a case
- Add annotations and comments to a case
- Split a case

Review a case

Unit objectives



Case states

A case goes through several states during its existence. After a case is completed, you can still find it and reopen it to work on it again.

This diagram shows how a case moves between states.

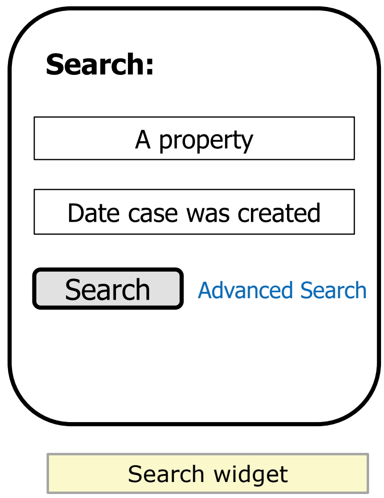
A case can be in any of the following states:

- New: case creation started
- Initializing: the case is being created, but is not yet ready to be worked on
- Working: the case was created and is ready to be worked on
- Complete: all required tasks in a case, are completed
- Failed: a failure occurred during case creation

IBM Training

Search for a case

- Use the Search widget to provide case workers with a way to search for cases based on selected property values.



Search for a case

You can conduct a basic or advanced search. Use the basic search to search across all case types by a case property, such as case ID, case title, or date created. Use advanced search to search for a case within a specific case type or to specify more complex criteria. For example, you can search for cases of a certain type that were added by a specific user between specified dates.

IBM Training

Review a case

- You might need to review a case when a new development in the case arises.
  - Example: You might need to review a case when a client is interested in a detail about the case.
- When you search for a case, you can open the case in the Case Details page. From there, you can perform several operations as needed.

Review a case

Review a case

You can review a case while it is in the Working or Completed state.

When you search for a case, you can open the case in the Case Details page. From the Case Details page, you can perform many operations. For example:

- review the case history
- add a comment to the case
- add a document to the case
- view case documents
- add a discretionary task
- add a custom task

IBM Training

Display documents in a case

- You use the Viewer widget to display documents in a case.
- IBM Content Navigator viewer allows users to view and annotate image documents.
- To configure the Viewer widget:
  - use the IBM Content Navigator administration tool to configure a viewer map for the Viewer widget

Review a case

Display documents in a case

The Viewer widget displays the Case Manager Viewer, which uses the IBM Content Navigator Viewer.

IBM Training

Annotating documents

- You can use the Viewer to annotate documents.
- Types of annotations:
  - text messages
  - arrows
  - highlights
  - stamps (date and time stamps, Rejected, Accepted, or others)
  - lines
  - polygons
  - freehand drawn lines
  - redaction

Review a case

Annotating documents

Add annotations to documents when you need to attach additional information to a file, like a time stamp, or approval stamp.

Annotations are secured separately from the documents that they are attached to. This fact has the following effects:

- Users who can view documents might not be able to view all the annotations.
- Users need permission to add annotations to a document.

IBM Training

Add case comments

- Case comments are a convenient way for case workers to communicate with one another about case details.
- Case comments are stored as case folder annotations.
- You can view the comments with the History view of the Case Information widget.

Review a case

Add case comments

IBM Training

Why split a case?

- You split a case to create a second case that is based on an existing case.
- The new case contains the same case data as the original case.

Review a case

Why split a case?

For example, you have a simple insurance claim that goes to the Arbitration stage. You can initiate a separate Arbitration case with the same data from the original case.

IBM Training

Demonstration 1: Review a case

- Tasks completed:
  - search for an existing case using a case property
  - review the widgets in the default Case Details page
    - Case Toolbar widget
    - Case Information widget
    - Properties widget
    - Timeline Visualizer widget

Review a case

Demonstration 1: Review a case

Demonstration 1: Review a case

Purpose:
A Dispute Advisor needs to search for a credit card dispute case for the customer John Jacobs. The Dispute Advisor needs to get familiar with the IBM Case Manager client to be able to find and review the information stored in the case.

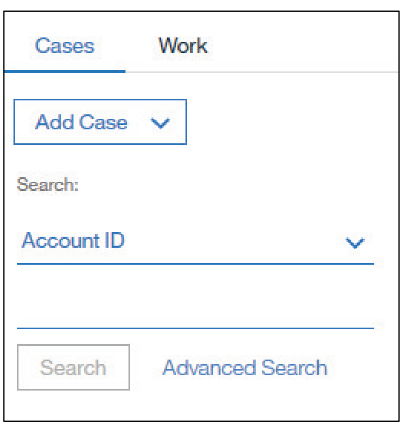
Task 1. Search for an existing case by Customer Name.

1. Open a Mozilla Firefox browser window.
2. On the Course Portal links page, click the **Case Client** link.
3. Log in as the Dispute Advisor.

   User/Password: **`Sue/FileNet1`**

   The default Cases page opens.

   - The Add Case button is contained in the Toolbar widget, which is displayed on the left of the page, in the upper half.
   - On the lower half, the Search widget is displayed.

   The Solution Builder can customize what properties are available to search on, during solution design.
4. In the **Search widget**, click the arrow to the right of **Account ID**, and then select **Customer Name**.
5. Type **`John`** on the blank line, and then click **Search.**

   You searched using the property, Customer Name.

   At the center of the Cases page**,** the search results display in the Case List widget. You see one case listed.
6. Click **title link** to open the case.

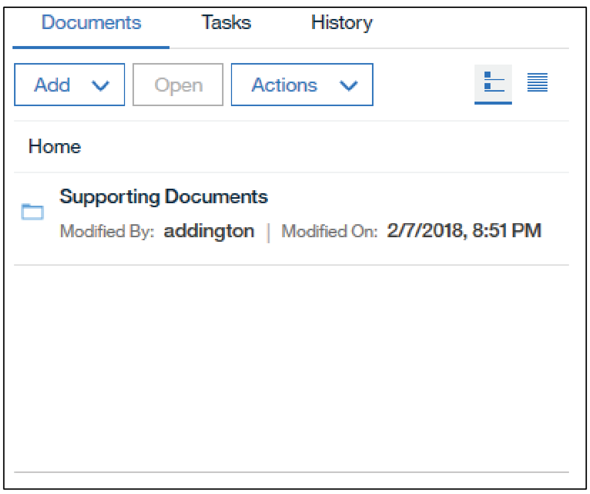
Task 2. Review the Case Toolbar widget.

1. You are on the default Case Details page.

   You see the Case Toolbar widget, on the upper left, which contains the options available, based on the user's privileges. You will explore some of these options in later demonstrations.

Task 3. Review the Case Information widget.

1. The Case Information widget has the **Documents** tab selected. You see the folder **Supporting Documents**.

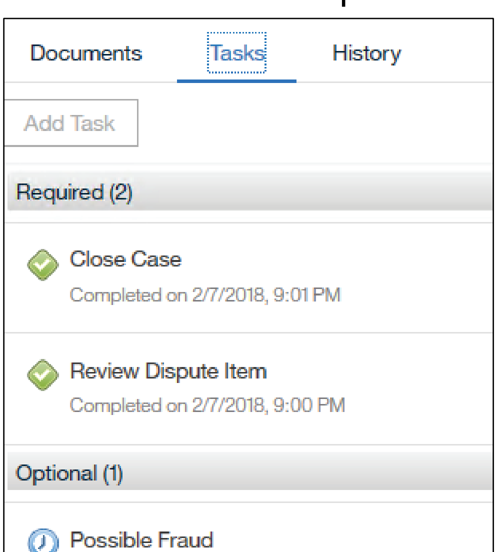


2. Click the **Supporting Documents** folder to see the contents.

   One file is listed.

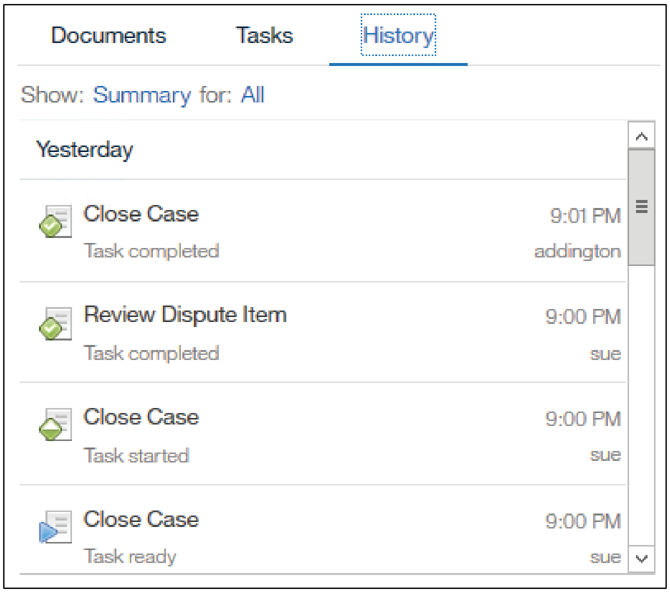
3. In the Case Information widget, click the **Tasks** tab.

   You see the list of required and optional tasks and their state.



4. Click the **History** tab.

   You see a history of the case. The action, who performed the action and the time is listed.



5. Click the scroll bar to scroll to the bottom of the case history.
6. Gradually scroll up to view the history chronologically.

   - Which user created the case?

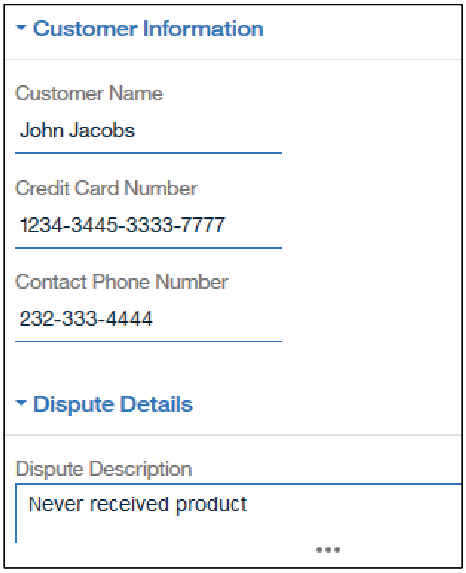
     The answers to the questions are in the Results section at the end of the demonstration.

   When a case is created, all the tasks defined for that case type are created. All the created tasks show addington as the user.

   - Who filed the document ACME invoice 1234.pdf in the Supporting Documents folder?
   - Who is assigned to starting the Close Case task?
   - What task did Addington complete?

Task 4. Review the Properties widget.

1. On the right you see the Properties widget.



2. Click the scroll bar on the far right to view all the properties.
   - What is the value of the Merchant Name?
3. Click the arrow to the left of **Customer Information**. Scroll up if necessary.

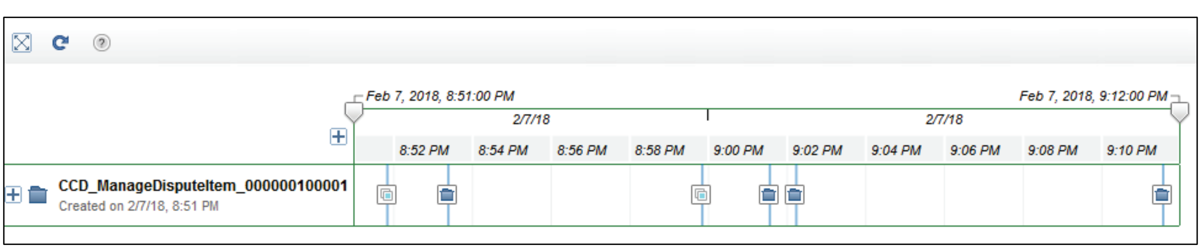
   The Customer Information section is collapsed.
4. Click on the other sections and collapse and expand them.

   The layout for the properties is defined by the solution builder when the solution is created.

Task 5. Review the Timeline Visualizer widget

1. At the bottom, you see the Timeline Visualizer widget, which displays a visual representation of the extended history for a case.

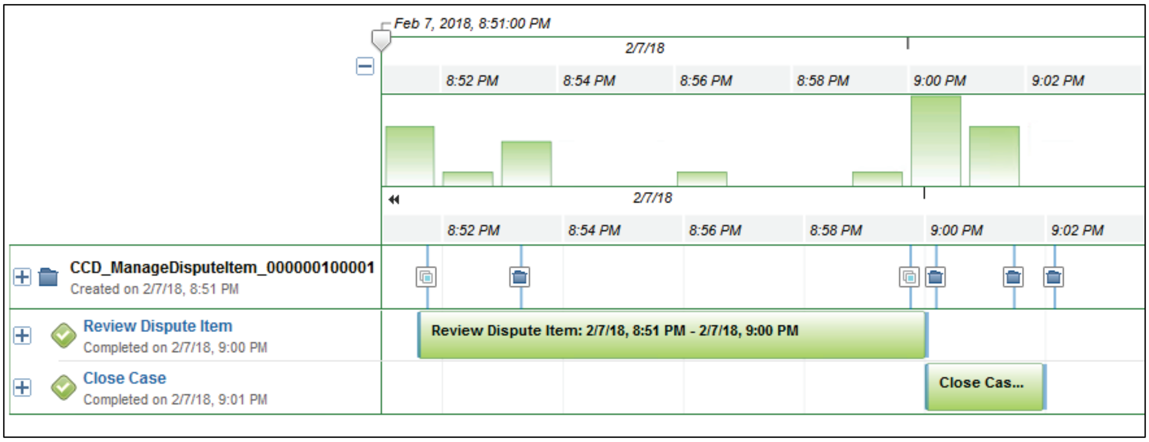
   The various icons show the progression of events, tasks, and work items over time for the case.



2. Click each of the icons in the timeline to view more information.

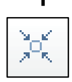
   The timeline shows the date and time that activities occurred. Clicking on an icon shows the tasks or events that occurred at that particular date and time.

3. Click **Maximize** icon  to view the visualizer in full screen mode.



You see 3 different graphs:

- The upper graph is a bar chart showing the number of events that occurred over time.
- The middle graph, is what you were looking at in step 2, which shows case specific actions.
- The lower graph shows each task, when it starts and when it completes.

4. On the lower graph, click the **Review Dispute Item** on the left.
   - What is the current status of the task?
   - Who completed the task?
5. Close the Review Dispute Item pop-up window.
6. Click **Restore** icon  to restore the window to its original size.
7. Leave the case open for the next demonstration.

   You can always use the Case Details page to review the status of any case, whether it is in a working or completed state.

Results:
As the Dispute Advisor, you searched for a credit card dispute case for the customer John Jacobs. You explored the various widgets in the Case Details page to get familiar with where to find the information stored in the case.
Answers to questions:

Task 3, step 6:	**addington, sue, sue, Close Case**
Task 4, step 2	**ACME**
Task 5, step 4	**Completed, sue**

IBM Training

Demonstration 2: Add an annotation to a document


ACME
December 12, 2017

Approved sue 2018
February 8

INVOICE #1234

Bill To	
Customer	John Jacobs
Customer ID#	1234-3445-3333-7777
Phone	232-333-4444
Payment Due	December 12, 2017

Document annotated with an Approved stamp

Review a case

Demonstration 2: Add an annotation to a document

Demonstration 2:
Add an annotation to a document

Purpose:
A Dispute Advisor needs to review a document that is filed in the credit card dispute case for the customer, John Jacobs. After reviewing the document, the Dispute Advisor adds an Approved stamp annotation.

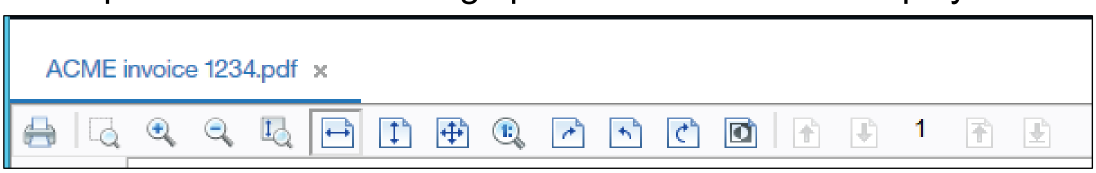
Task 1. Open the document in the viewer.

You are logged in as the Dispute Advisor and the case from the previous demonstration is opened.

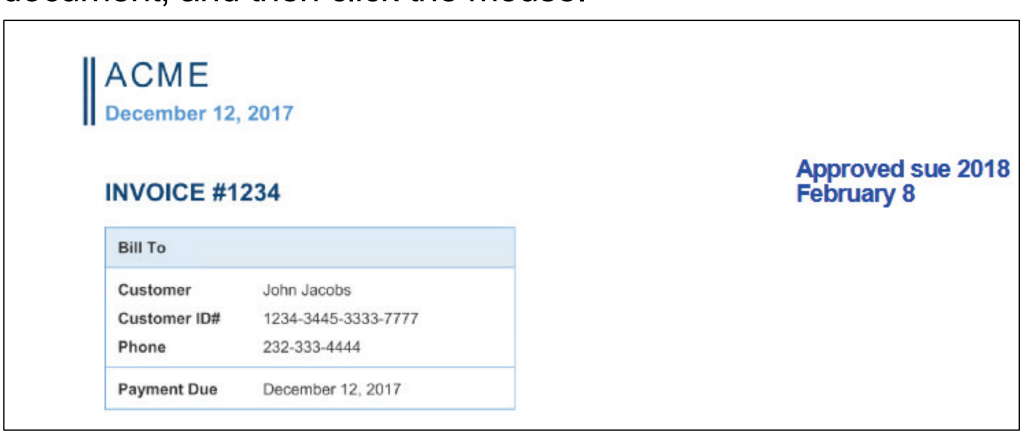
1. In the Case Information widget, click the **Documents** tab.
2. Click **Supporting Documents** to open the folder.
3. Open the **ACME invoice 1234.pdf**, by clicking the icon or the name of the file.
   The file is opened in the IBM Case Manager viewer.

Task 2. Explore the viewer

1. The top toolbar has formatting options for the window display.



2. Hover over the icons to see what they do.
3. The left toolbar lists the different annotations that you can add to the document.
4. Click the **Stamp** icon , and then select **Approved <user> <date>**.
5. Move the cross pointer where you want the annotation to appear on the document, and then click the mouse.

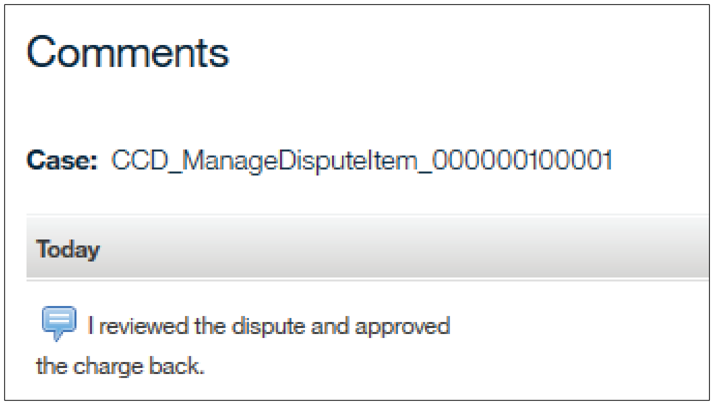


6. Click **Save** icon  on the left toolbar, to save the annotation.
7. Close the viewer.
8. Click **Save** on the upper-right**,** to save the changes to the case.
   Leave the case open for the next demonstration.

Results:
As the Dispute Advisor, you reviewed the invoice for the credit card dispute case for John Jacobs. You added an Approved stamp annotation to the invoice.

IBM Training

Demonstration 3: Add a comment to a case



Comment added to a case

Review a case

Demonstration 3: Add a comment to a case

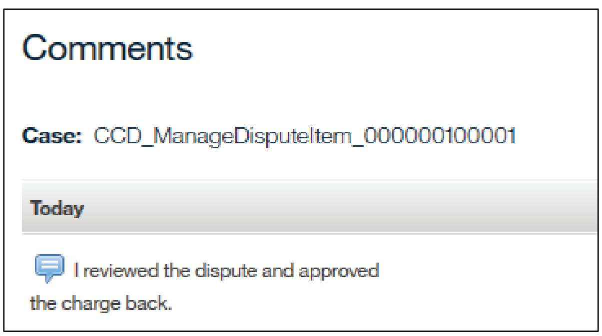
Demonstration 3: Add a comment to a case

Purpose:
A Dispute Advisor has reviewed a credit card dispute and approved the charge back. The Dispute Advisor wants to add a comment that will get recorded in the case.

Task 1. Add a comment.

You are logged in as the Dispute Advisor and the case from the previous demonstration is opened.

1. Click **Comments** in the **Toolbar widget**.
2. Type a comment. For example, **`I reviewed the dispute and approved the charge back`**.
3. Click **Add**.



4. Click **Close** on the Comments window.
5. **Save** and close the case.
6. Log out of the IBM Case Manager Client.
7. **Close** the browser window.

Results:
As the Dispute Advisor, you added a comment to a credit card dispute case.

IBM Training

Demonstration 4: Split a case

Title	Customer Name	Case Type	Case State
CCD_ManageDisputeItem_000000100003	Jerry Sprouts	Manage Dispute Item	Complete
CCD_ManageDisputeItem_000000110001	Jerry Sprouts2	Manage Dispute Item	Working

Case List widget showing two cases.
The first case is the original case.
The second case is created by the Split Case.

Review a case

Demonstration 4: Split a case

Demonstration 4: Split a case

Purpose:
A Dispute Advisor needs to flag a credit card dispute case, for the customer Jerry Sprouts, as potential fraud. The existing case is already complete. The Dispute Advisor will need to split the existing case flag the split case with the Potential_Fraud flag to start a fraud investigation task.

You are logged in as the Dispute Advisor.

Task 1. Search for a case.

1. In the Search widget, change `John` to `%`.

   The percent sign is a wild card character. You are searching for all cases. You can use **Account ID** to search as well.

   You see at least three cases listed in the Case List widget.

Title	Customer Name	Case Type
CCD_ManageDisputeItem_000000100001	John Jacobs	Manage Dispute Item
CCD_ManageDisputeItem_000000100002	Jane Good	Manage Dispute Item
CCD_ManageDisputeItem_000000100003	Jerry Sprouts	Manage Dispute Item

2. Open the case for **Jerry Sprouts**.

Task 2. Split the case.

1. In the Toolbar widget, click **Split Case**, and then select **Manage Dispute Item**.

   The Split Case action creates another case of the case type selected, copying all case data from the original case.
2. On the left, you see the case properties for the new split case you are creating and the original case.
3. Modify a few property values for the **Split Case**.
   - Modify the **Customer Name**. For example, type `Jerry Sprouts2`.
   - Clear the **Close the case** flag.
   - Set the **Potential_Fraud** flag.
4. Click **Add**.
5. Click **Close**.

6. Search for cases for **Jerry**.

   The original case and the new case that was created by the split case are displayed.

Title	Customer Name	Case Type	Case State
CCD_ManageDisputeItem_000000100003	Jerry Sprouts	Manage Dispute Item	Complete
CCD_ManageDisputeItem_000000110001	Jerry Sprouts2	Manage Dispute Item	Working

   Notice the Case State. The new case, created by the case split, is in a Working State. Setting the Potential_Fraud flag will trigger a fraud investigation task to start.

7. If you want, you can open the new case that you created and verify the modifications to the properties.
8. When you are done, close the case, and then log out.

Results:
As the Dispute Advisor, you opened an existing credit card case dispute case for the customer, Jerry Sprouts. You split the case to create a copy of the case, and set the Potential_Fraud flag on the split case.

IBM Training

Unit summary

- Search for a case
- Review a case
- Add annotations and comments to a case
- Split a case

Review a case

Unit summary

IBM Training

Exercise 1: Add an annotation and split a case

ABC COMPANY
December 1, 2017

Reviewed sue 2018 February 8

INVOICE #3345

Invoice with Reviewed stamp

Title	Customer Name	Case Type	Case State
CCD_ManageDisputeItem_000000100002	Jane Good	Manage Dispute Item	Complete
CCD_ManageDisputeItem_000000110002	Jane Good	Manage Dispute Item	Working

Case List widget showing two cases.
The first case is the original case.
The second case is created by the Split Case.

Review a case

Exercise 1: Add an annotation and split a case

Exercise 1:
Add an annotation and split a case

A Dispute Advisor is asked to review a Credit Card Dispute case for the customer, Jane Good, to determine if a new case needs to be sent to the Fraud team for investigation. The Dispute Advisor uploads the ABC invoice to the Supporting Documents folder and adds a Reviewed stamp annotation. The Dispute Advisor decides to Split the case and start a fraud investigation. In the split case the Dispute Advisor clears the Close the Case flag and sets the Possible_Fraud flag.

- User/Password: **`Sue/FileNet1`**
- Invoice: C:\Training\F2900\ABC invoice.pdf

The Dispute Advisor searches for cases for Jane Good to verify that a new case was created and the case is in the working state.

For more information about where to work and the exercise results, refer to the Tasks and Results section that follows. If you need more information to complete a task, refer to earlier demonstrations for detailed steps.

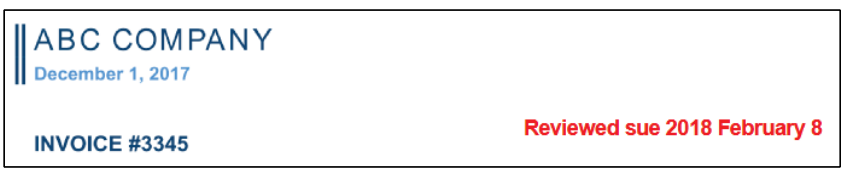
Exercise 1:
Tasks and results

Task 1. Search for the customer case.

- Open the IBM Case Manager Client and log in as `Sue`/`FileNet1`.
- In the Search widget, search for the customer `Jane Good`.
- Open the case.

Task 2. Add an invoice and annotate it as reviewed.

- Add the document **ABC invoice.pdf** to the **Supporting Documents** folder.
  The file is located in the folder **C:\Training\F2900**.
- Open the invoice.
- Add a **Reviewed <user> <date>** stamp annotation.



- Save the document, close the viewer, and save the case.

Task 3. Split the case and start a fraud investigation task.

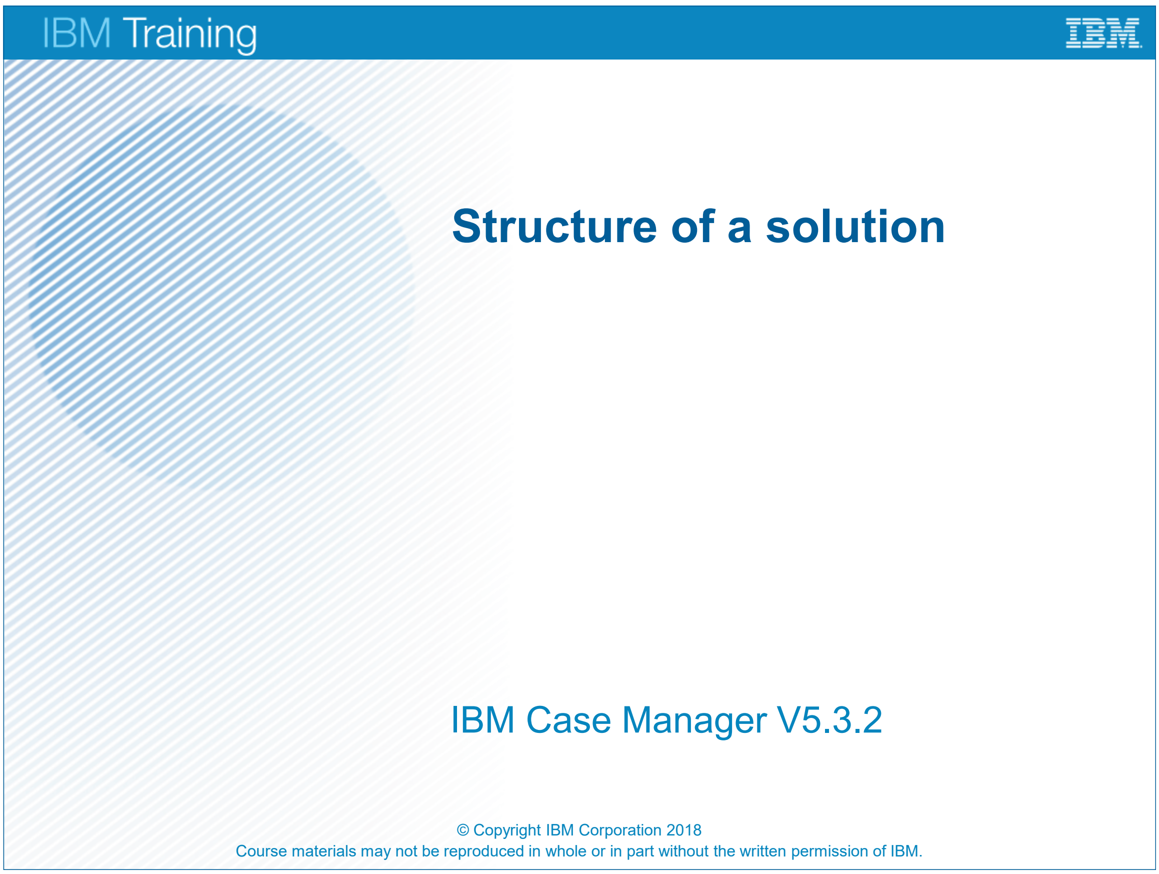
- Click **Split Case**, and then select **Manage Dispute Item**.
- In the **Split Case**, clear the **Close the case** flag.
- Set the **Potential_Fraud** flag.
- Click **Add**.
- Close the original case.
- Search for cases with **Customer Name** equal to `Jane`.

At the end of the exercise, the results appear as follows:

Title	Customer Name	Case Type	Case State
CCD_ManageDisputeItem_000000100002	Jane Good	Manage Dispute Item	Complete
CCD_ManageDisputeItem_000000110002	Jane Good	Manage Dispute Item	Working

Two cases are listed. The original case has a Case State of Complete, and the new case, which was created when the case was split, has a Case State of Working.

Unit 4 Structure of a solution



IBM Training

Unit objectives

- Describe IBM Case Manager solutions and their assets
- Identify IBM Case Manager environments
- Explore the IBM Case Manager Builder Step Designer

Structure of a solution

Unit objectives

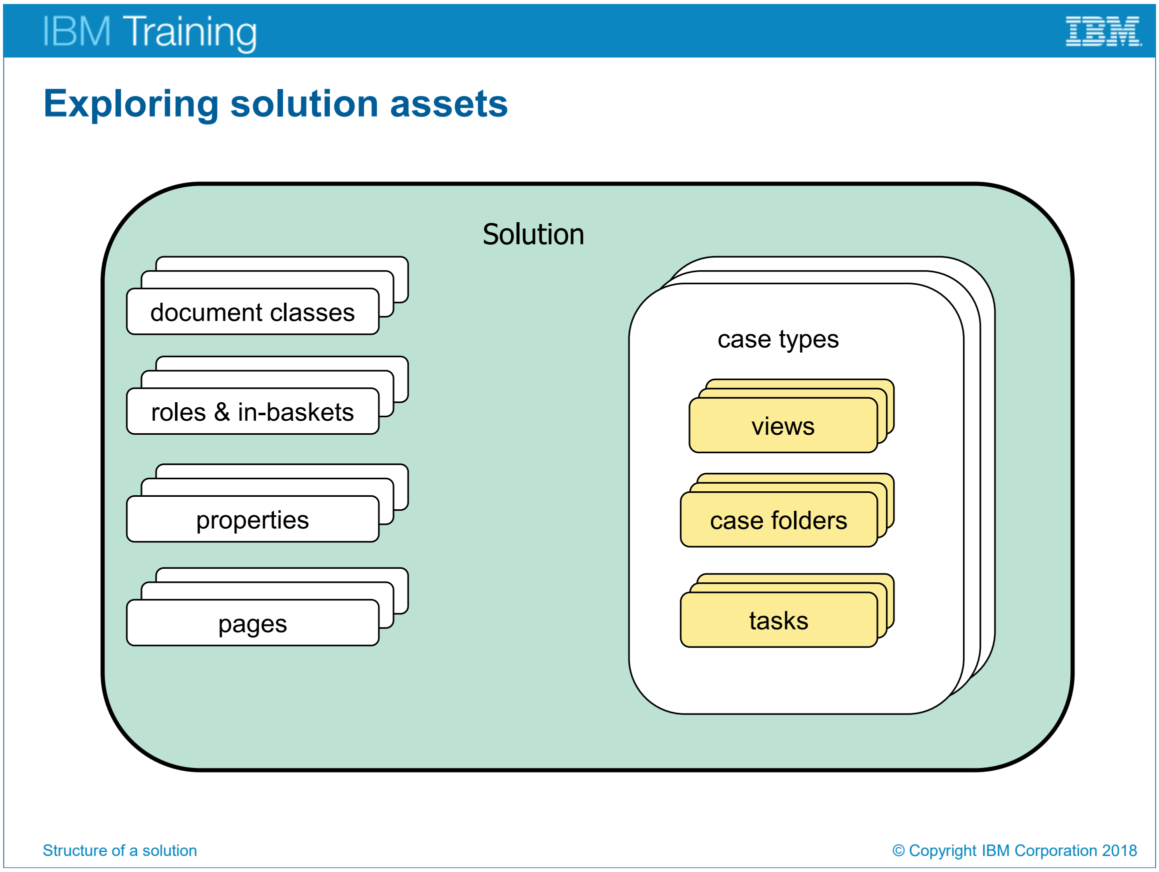
IBM Training

What is an IBM Case Manager solution?

- An IBM Case Manager solution:
  - provides the structure for the management of cases
  - consists of a user interface with solution assets

Structure of a solution

What is an IBM Case Manager solution?



Exploring solution assets

The pieces of a solution are called solution assets.

The solution assets, shown in this diagram, are created with IBM Case Manager Builder. These assets are referred to in this course as IBM Case Manager Builder assets.

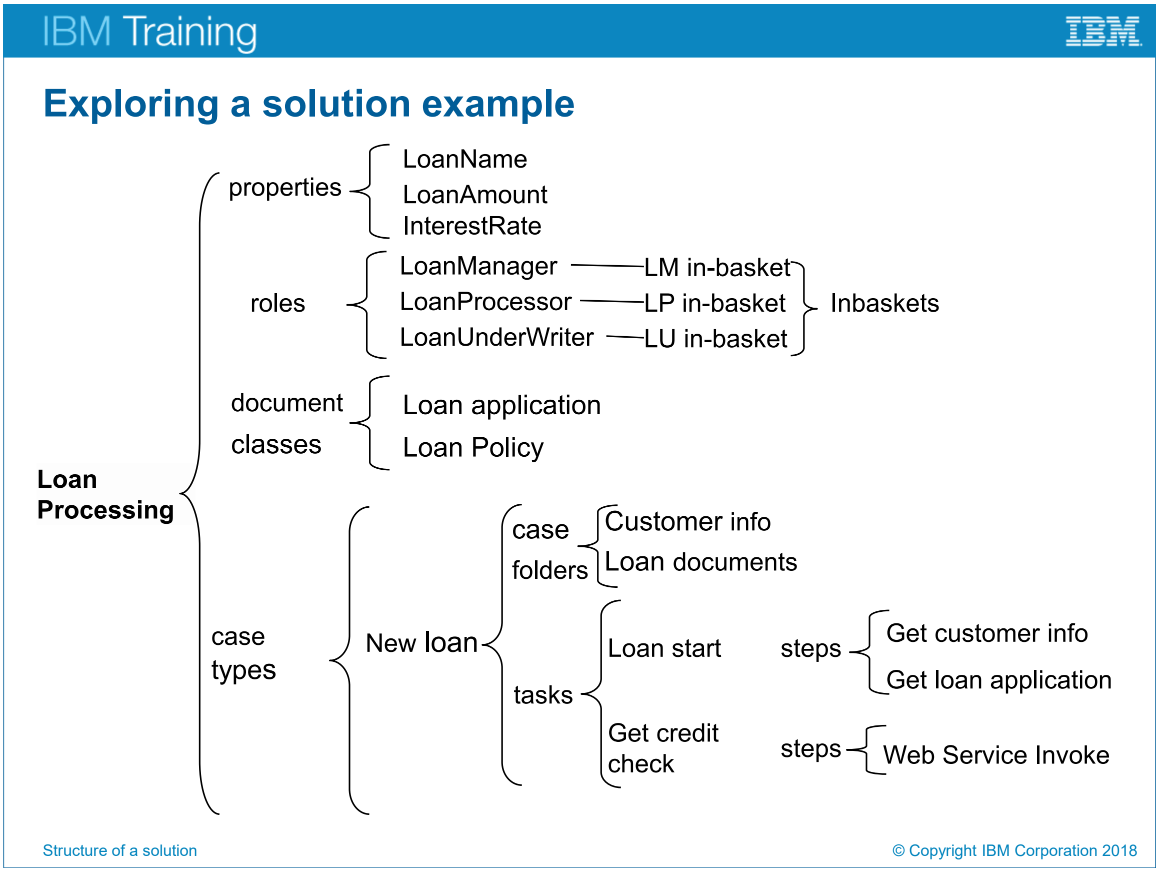
Solution Builders can create IBM Case Manager Builder assets for quick prototyping. A solution can link to external assets as well, which are developed with other tools.

Each solution can handle a number of different case types. For example, the Complaints Management system must handle customer complaints, internal employee complaints, and customer feedback. The solution might have a case type for each of these inputs.

Each solution has metadata such as; properties, document classes, and roles.

Each case type can have a number of tasks. A task has one or more steps that must be completed. A task can also start external processes.

The different types of cases within a solution are related, but have different tasks that must be completed to complete the case. Roles are defined at the solution level so case workers with roles in a solution can work with the different case types that are part of the solution.



Exploring a solution example

This diagram shows the structure of an example solution: Loan processing. The diagram shows one case type, New Loan. The solution can have as many case types as needed.

This solution has:

- three properties: LoanName, LoanAmount, and InterestRate
- three roles: LoanManager, LoanProcessor, and LoanUnderWriter
- two document classes: Loan application, and Loan Policy

Each case type can have a number of tasks. A task has one or more steps that must be completed.

The New Loan case type has two tasks:

- Loan start which has two steps; Get customer info, and Get loan application.
- Get credit check, which has one step, Web Service Invoke.

Each case type can have case folders. The New Loan case type has two case folders:

- Customer info
- Loan documents

IBM Training

Enhancing a solution with solution application assets

- A solution design can be enhanced, beyond the current capabilities of the Case Manager Builder tool, by using other tools.
  - Sometimes these assets are called solution application assets.
- Examples of solution application assets:
  - custom widgets
  - forms
  - stored searches
  - reused business processes
  - reused document properties and classes
  - external components

Enhancing a solution with solution application assets

IBM Training

Where are the solution assets stored?

- IBM Case Manager stores its solution assets and case data in repositories called object stores.
- Each IBM Case Manager environment contains two object stores:
  - design or staging: stores solution asset definitions
  - target: stores executable solutions and case data

Structure of a solution

Where are the solution assets stored?

IBM Case Manager uses FileNet P8 object stores for creating, storing, and deploying case solutions.

Each IBM Case Manager environment contains two object stores.

- A design or staging object store, which stores the solution asset definitions.
- A target object store where the solution definitions are deployed, to create executable solutions. The data for the cases created are also stored in this object store.

When IBM Case Manager is first installed and configured, you have a choice of two types of environments:

- development environment which contains a design object store and a target object store
- test and production environments which contain a staging object store and a target object store

IBM Training

Development environment for solution development

- The development environment is where solutions are developed.
- Development environment:
  - is typically in a dedicated FileNet P8 domain
  - includes a design object store and multiple target environments
  - includes IBM Case Manager Builder

Structure of a solution

Development environment for solution development

The development environment is typically in a dedicated FileNet P8 domain and includes a design object store where solution definitions are stored. You use IBM Case Manager Builder to define solutions, which are then saved and versioned in the design object store. You can have multiple project areas in the design object store to group solutions and minimize the effects of using the Reset Test Environment feature.

After you design a solution, you deploy the solutions into a target environment, which contains a target object store and a workflow isolated region. You use IBM Case Manager Client, a custom IBM Content Navigator desktop, to do basic functional testing of your solution and to customize the user interface.

Refer to the development environment diagram in the IBM Knowledge Center (https://www.ibm.com/support/knowledgecenter/en/SSCTJ4_5.3.2/com.ibm.casemgmt.installing.doc/acmpi044.htm).

IBM Training

Test environment for pre-production testing

- A test environment is used for testing solutions that are created in the development environment.
- A test environment:
  - can be in a different FileNet P8 domain or in the same FileNet P8 domain as the development environment
  - contains a staging object store and target environments
  - does not include IBM Case Manager Builder

Structure of a solution

Test environment for pre-production testing

Multiple test environments are possible, for example a Quality Assurance test environment and a User Acceptance test environment.

A test environment can be in a different FileNet P8 domain or in the same FileNet P8 domain as the development environment, but with a different set of object stores to use for the staging and target object stores. No project areas are used in a test environment, but multiple target environments are supported, as in the development environment. Solutions built in the development environment are imported into the test environment.

A test environment does not have the design tool, IBM Case Manager Builder. IBM Case Manager administration client is used to:

- import the solutions, that are exported from a development environment's design object store into a staging object store in the test environment
- deploy the solutions to the target environment

Refer to the test environment diagram in the IBM Knowledge Center (https://www.ibm.com/support/knowledgecenter/en/SSCTJ4_5.3.2/com.ibm.casemgmt.installing.doc/acmpi044.htm).

IBM Training

Production environment for business applications

- A production environment is where solutions are deployed to handle the business needs.
- A production environment:
  - is in a dedicated FileNet P8 domain
  - includes a staging object store and target environments

Structure of a solution

Production environment for business applications

A production environment is where a solution is deployed into production for case workers to process cases.

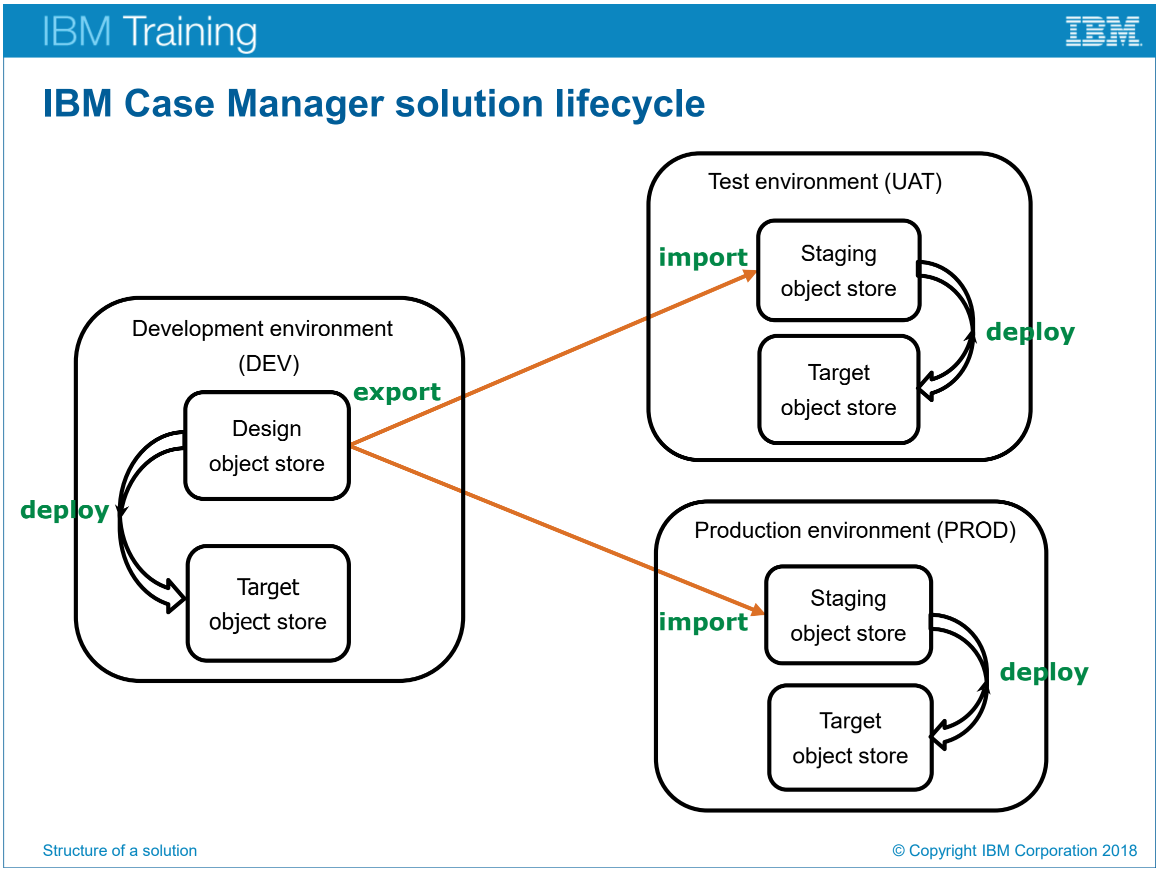
A production environment, includes:

- a staging object store where solutions are imported to and deployed from, similar to the test environment.
- target environments to deploy the solutions to. Many solutions can be deployed into a single target environment.

Like the test environment, the production environment does not include IBM Case Manager Builder. IBM Case Manager administration client is used to import and deploy the solutions.

Refer to the production environment diagram in the IBM Knowledge Center (https://www.ibm.com/support/knowledgecenter/en/SSCTJ4_5.3.2/com.ibm.casemgmt.installing.doc/acmpi044.htm).

The image that supports the activities for this course has a development environment.



IBM Case Manager solution lifecycle

The diagram shows the solution lifecycle used in IBM Case Manager.

A traditional application/solution lifecycle, involves at least three environments:

- development (DEV)
- user acceptance testing (UAT) or quality assurance (QA)
- production (PROD)

A given application moves in stages through those environments. For example, DEV > UAT > PROD.

If an issue is found in the UAT environment, a correction to the application can be applied and tested directly in the UAT environment. Once the user acceptance tests have passed, the application is often migrated directly from the UAT environment to the PROD environment.

In IBM Case Manager solutions, the same recommendations for environment separation and other best practices apply. However, the lifecycle for an IBM Case Manager solution differs in one important way from the traditional application lifecycle. To better control versions of the solution definition, the solution design tool, IBM Case Manager Builder, is only available in the development environment. This ensures that the solution follows a well-controlled modification process. The solution definition is governed using well-defined procedures with a “one source” approach. The development environment manages the solution definition. The solution definition is exported from the development environment and imported into the other environments. The solution definition is deployed from the design or staging object stores to the target environments.

Any issues found in UAT that require changes to the solution, must be resolved and tested first in the development environment. Then, the solution is migrated to the UAT staging object store and redeployed to the UAT target environment for verification and further testing. Thus, the solution moves through the environments in stages, DEV > UAT, DEV > PROD.

IBM Training

Solution development summary

- During solution development:
  - configuration, files are created in the design object store
- During solution deployment:
  - objects are created in the target object store, according to the specifications in the configuration files
- During solution testing:
  - case folders, related objects, and workflows are created in the target object store and the workflow isolated region

Structure of a solution

Solution development summary

When you create a solution with IBM Case Manager Builder, you are creating files on the design object store in a development environment. Each file contains a different set of information about the solution.

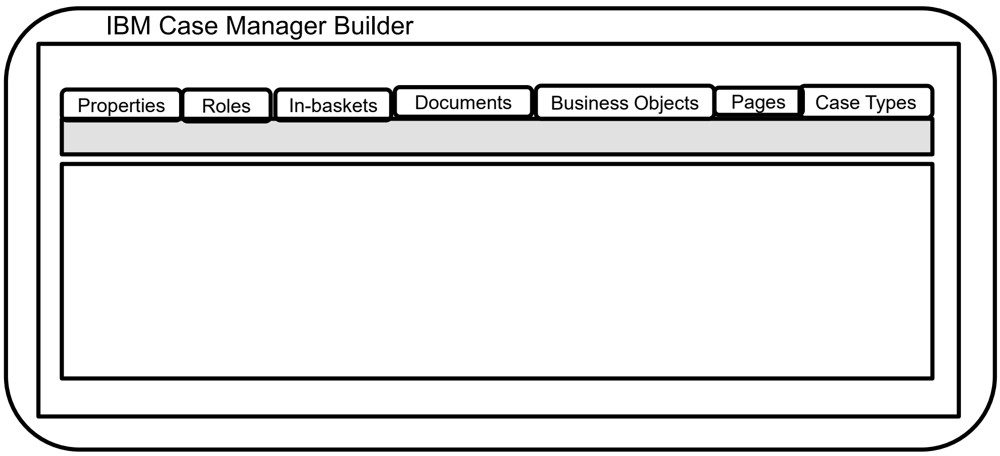
When you deploy the solution, the data in the configuration files are used to create objects in the target object store. Before deployment, these objects do not exist except as entries in the configuration files.

After a solution is deployed, when a case is added, a new case folder is created in the target object store to store all the data for the given case instance.

IBM Training

IBM Case Manager Builder

- Use IBM Case Manager Builder to design and edit solutions.
- The interface includes tabs for each type of asset.



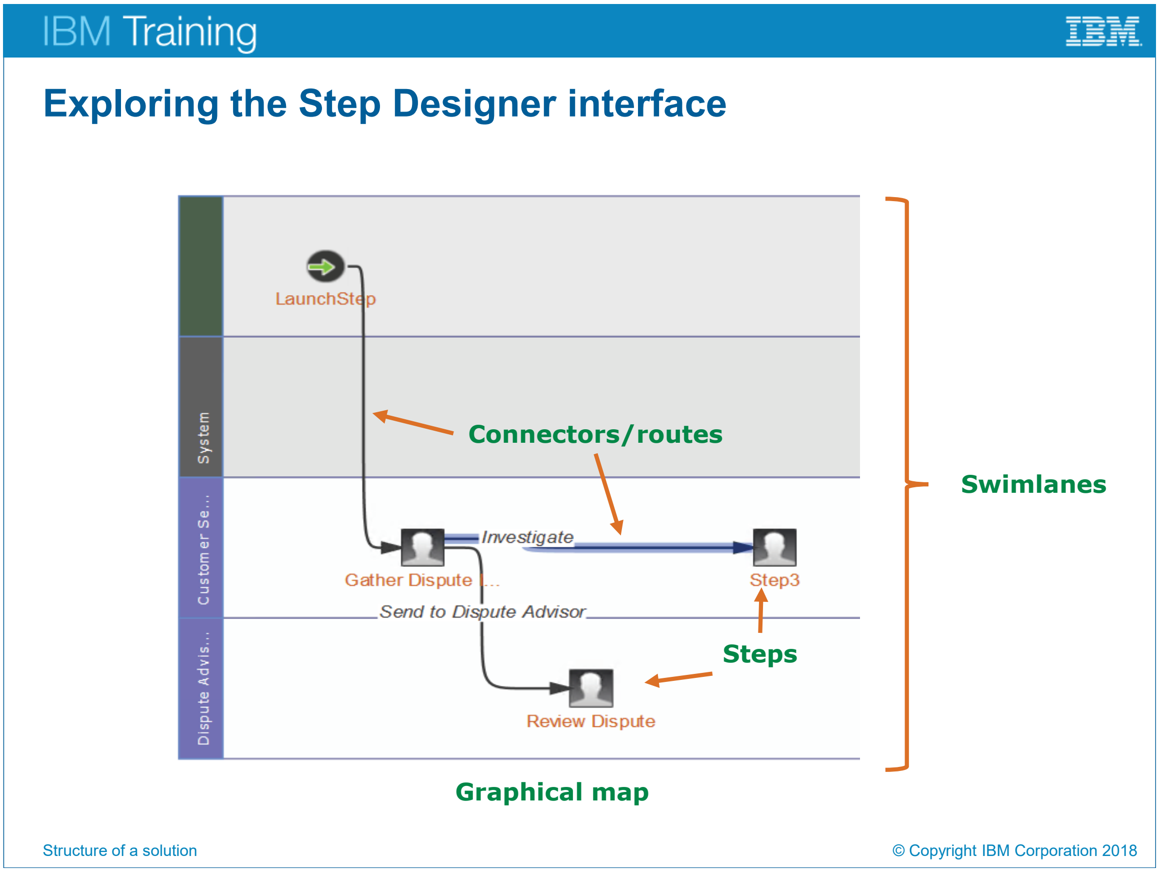
Structure of a solution

IBM Case Manager Builder

IBM Case Manager Builder is used to design and edit solutions in a development environment.

IBM Case Manager Builder provides tabs to use for creating or editing the solution assets. You can click any tab to open the configuration page for that type of asset. The diagram shows an example of the tabs that might be displayed.

If you want to learn how to use IBM Case Manager Builder to design solutions, refer to the courses, F2910 or F2919 Build Case Manager Solutions and F2940 or F2949 Customize the IBM Case Manager Client User Interface.



Exploring the Step Designer interface

You use IBM Case Manager Builder Step Designer to design the sequence of steps in a task that must be completed for a business process.

The Step Designer interface includes:

- a graphical map: the graphical map shows the sequence of steps that must be completed for the business process. Each step represents a specific action in the business process.
- Swimlanes: swimlanes identify who or what is responsible for a given step. Each task includes an unlabeled swimlane with a LaunchStep and a System swimlane. The System swimlane can contain rule steps and system steps, such as component steps and submap steps. Steps in the System swimlane are usually not editable in the Step Designer. You can add role lanes and work group lanes. The diagram shows two role lanes: Customer Service Representative, and Dispute Advisor. The role names are truncated.
- Steps: steps are added to swimlanes. You can add several types of steps. The diagram shows three steps: Gather Dispute, Review Dispute, and Step 3. You add details for each step: required attachments, case properties, what responses the participant can choose, deadlines, and other step properties.

- Connectors: connect steps and include route logic which specifies how work moves from one step to the next. Routing can branch based on the user responses, or it might be straight from one step to the next. Routes can cross swimlanes to permit workers in different roles or workgroups to complete the steps.

Apply your knowledge

Use the questions in this section to test your knowledge of the course material. For each question, indicate the correct answer or the best answer.

Question 1: Which of the following assets are part of an IBM Case Manager solution?

A. properties, roles, and workflows
B. document classes, roles, properties, and pages
C. document classes and workflows
D. roles, in-baskets, reusable business processes

Question 2: In a development environment, where are the solution definitions stored?

A. staging object store
B. target object store
C. design object store
D. target environment

Question 3: How many object stores does an IBM Case Manager development environment have?

A. No more than three object stores
B. A minimum of two, but more can be added.
C. Four, two for the design and two for the target.
D. Two, one for the design and one for the target

Question 4: Which tool do you use to export and import solutions?

A. IBM Case Manager Builder
B. IBM Case Manager administration client
C. IBM Case Manager Client
D. IBM Content Navigator

Question 5: In a development environment, which tool is used to deploy the solutions to the target environment?

A. IBM Case Manager Builder
B. IBM Case Manager administration client
C. IBM Case Manager Client
D. IBM Content Navigator

Question 6: How would you describe the IBM Case Manager solution lifecycle?

A. DEV > UAT > PROD
B. DEV > UAT> QA > PROD
C. DEV > UAT, DEV > PROD
D. DEV > PROD

Question 7: Where is a deployed solution stored?

A. design object store
B. staging object store
C. workflow region
D. target environment

Answers to questions

Answer 1: B. document classes, roles, properties, and pages

Answer 2: C. design object store

Answer 3: D. 2

Answer 4: B. IBM Case Manager administration client

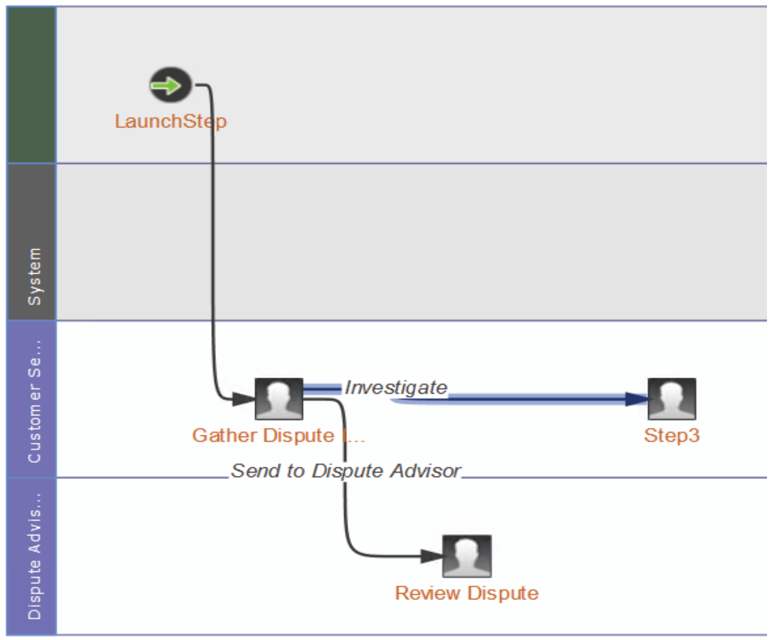
Answer 5: A. IBM Case Manager Builder

Answer 6: C. DEV > UAT, DEV > PROD

Answer 7: D. target environment

IBM Training

Demonstration 1: Explore the Step Designer



Structure of a solution

Demonstration 1: Explore the Step Designer

Demonstration 1: Explore the Step Designer

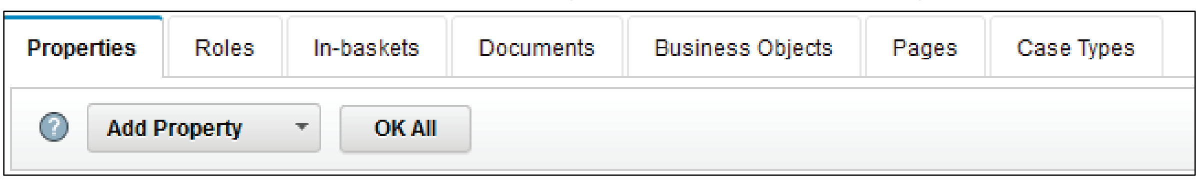
Purpose:
You are a solution builder new to IBM Case Manager. You are going to be defining solutions, so you need to see how IBM Case Manager Builder Step Designer is used.

Task 1. Open IBM Case Manager Builder Step Designer.

1. Open a Mozilla Firefox browser.
2. In the Course Portal Links, click **Case Builder**.

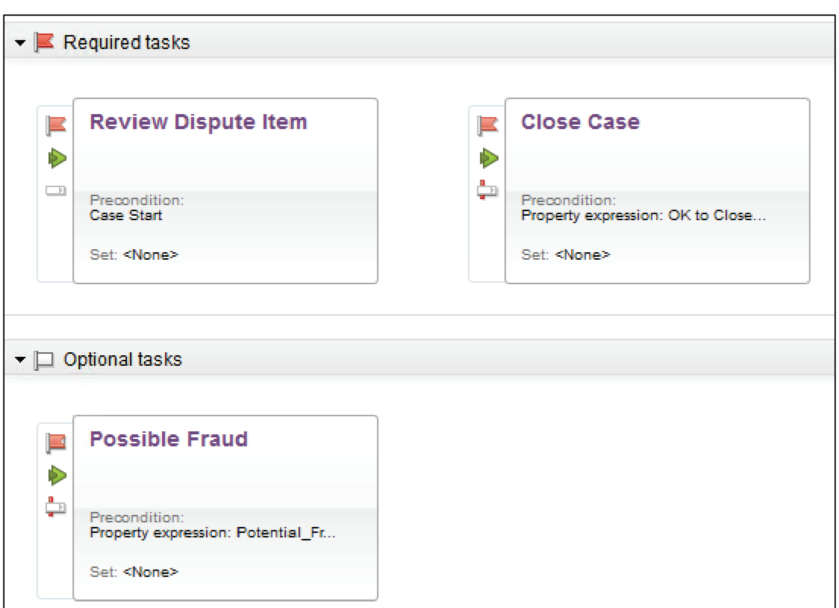
   IBM Case Manager Builder URL: http://vclassbase:9081/CaseBuilder
3. Log in as `p8admin/FileNet1`.
4. Open the **Credit Card Dispute** solution, by clicking on the credit card icon or the name.

   You see the tabs in the top-level page of IBM Case Manager Builder.



5. Click the **Case Types** tab.

   The Step Designer is used to define tasks, which exist within a case type.
6. Click **Manage Dispute Item** to open the case type.
7. Click **Tasks**.



8. Hover your mouse over the **Review Dispute Item** task so the right icons are visible.

9. Click the **Edit Steps** icon  in the upper-right corner.

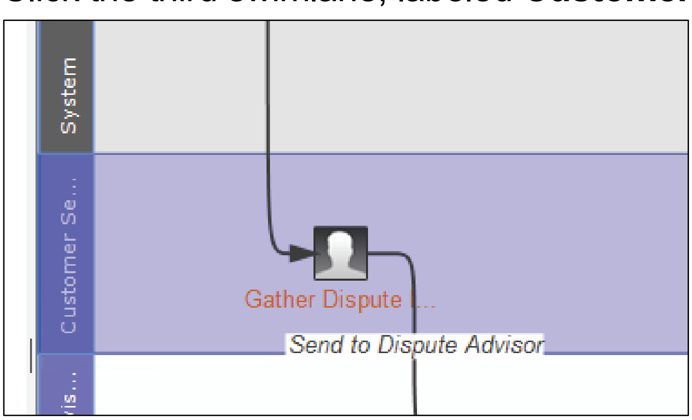
   The Step Designer opens, showing the details of the **Review Dispute Item** task.

Task 2. Explore the Step Designer.

1. On the left is the **Palette**, which contains the different types of objects that can be added to a task.

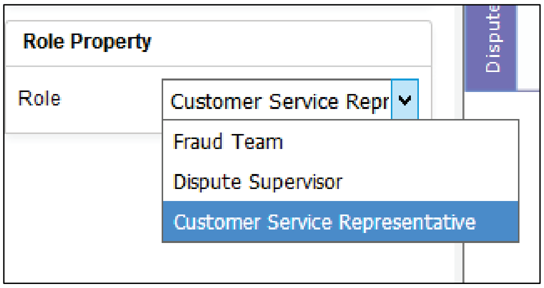
   On the main map, the swimlanes and steps are displayed. The first two swimlanes are automatically created when you create a task.

2. Click the third swimlane, labeled **Customer Service**.



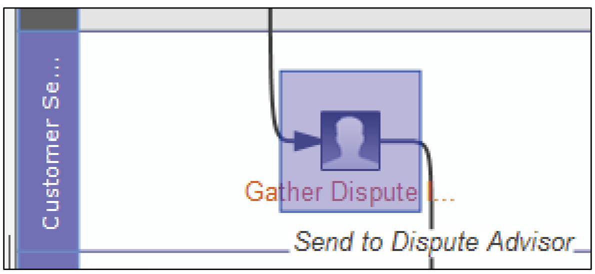
   This swimlane is called a Role Lane. You create a role lane by dragging the Role Lane icon from the Palette and dropping it onto the main map. You then assign a role to the lane.

3. On the left, under **Role Property**, click the arrow to select the **Role**.



You assign a role to the swimlane, with the selection menu, which contains the roles defined in the solution. The role assigned to the role lane determines who needs to process the step. Don't change the role.

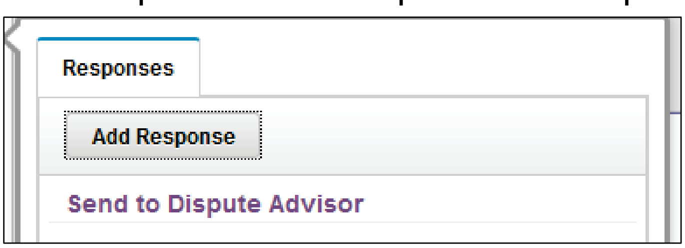
4. Click the **Gather Dispute Information** step.



On the left, you see the **Step Properties**.

5. Click the **Name** field. This field creates the label for the step that is shown on swimlane.
6. Click the ellipsis by the **Responses** Field.

The Responses wizard opens. One response is defined for this step.

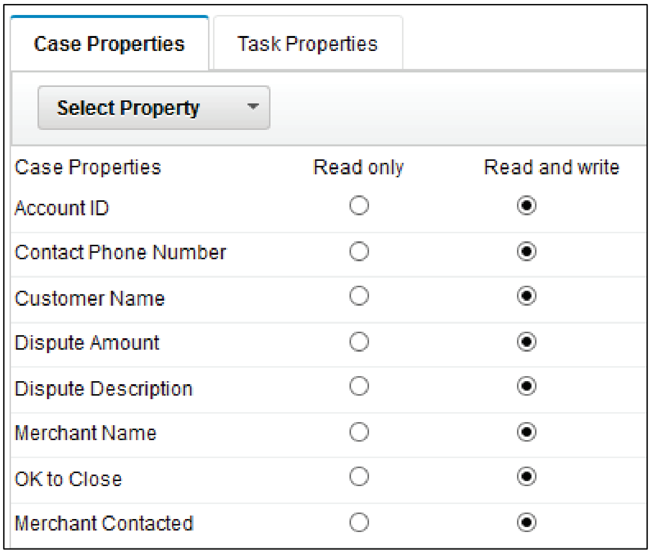


A response becomes an option, in IBM Case Manager Client, that a case worker can choose.

7. Click **Cancel**.

8. Click the ellipsis by the **Properties** field.

   The Properties wizard opens. This step has 8 case properties defined, and no task properties.



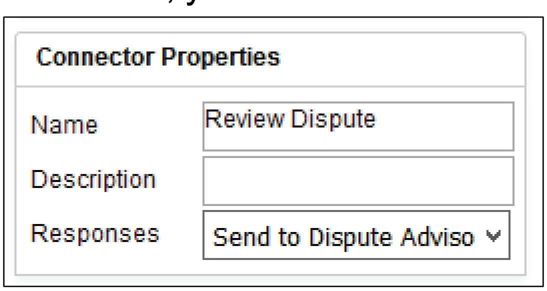
   All the case properties are set to **Read and write**, which means that the case properties can be modified at this step. If a case property is **Read only** then it cannot be modified.

9. Click **Cancel**.

10. On the main map, click the connector between the **Gather Dispute Information** and **Review Dispute** steps.

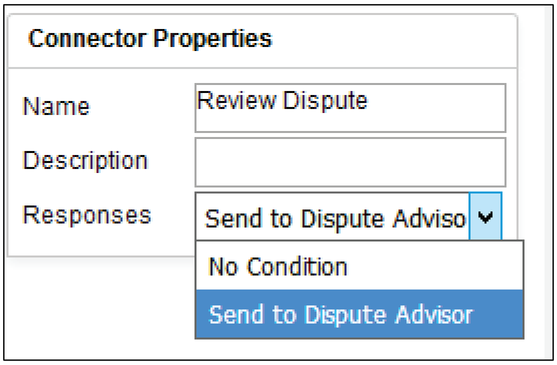
    You will know it is selected because the connector gets a blue outline.

    On the left, you see the **Connector Properties**.



    A connector defines how the work flows between steps. The label of the connector on the map is determined by the destination step.

11. Click the **Responses** selector.



You see two possible responses: **No Condition** and **Send to Dispute Advisor**. In this solution, when a case worker chooses the option **Send to Dispute Advisor**, the next work item will be the **Review Dispute** step, which is assigned to the role **Dispute Advisor**.

Task 3. Add a step to the Customer Service Role Lane.

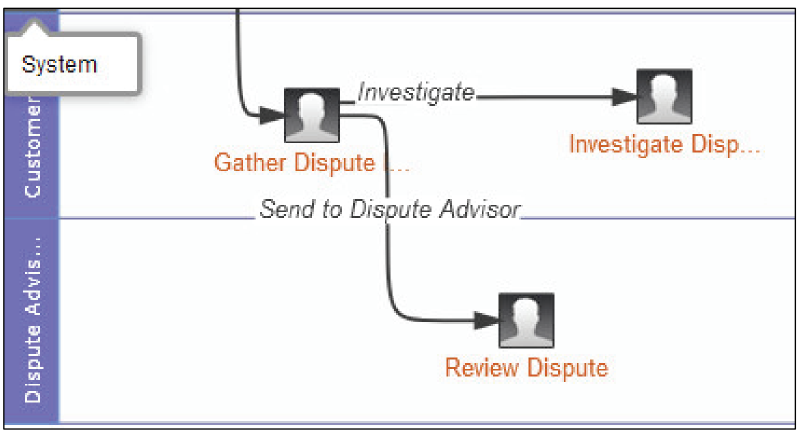
1. In the Palette, click the **Step** icon and hold down the mouse as you drag and drop it in the **Customer Service** swimlane, to the right of the existing step.
2. In the **Step Properties**, set the **Name** to **Investigate Dispute**.
3. Click the ellipsis by the **Properties** field.
4. Click **Select Property**, and then click **Select All**.
5. Click **OK**.
6. Click **OK** again.

Task 4. Add a response to a step.

1. Click the **Gather Dispute Information** step.
2. Click the ellipsis by the **Responses** field.
3. Click **Add Response**.
4. In the **Response name** field, type **Investigate**.
5. Click **OK** to add the response to the responses field.
6. Click **OK** to add the responses to the step.

Task 5. Add a connector to connect two steps.

1. In the toolbar above the main map, click the **Add connector between steps** icon .
2. To connect the **Gather Dispute Information** to **Investigate Dispute**, complete these steps:
   - Click the **Gather Dispute Information** step, until you see a cross bar.
   - Hold down the mouse and drag the mouse to the center of the **Investigate Dispute** step.
   - Release the mouse.
3. In the **Connector Properties**, click the arrow in the **Responses** field, and then select **Investigate**.



4. Click **Close** on the upper-right corner.
5. On the warning pop-up, choose **Discard**.
6. Click **Back**.
7. Click **Close**.
8. Log out.

Results:
As a solution builder, you added a step, a response, and a connector to an existing solution to get familiar with IBM Case Manager Builder Step Designer.

IBM Training

Unit summary

- Describe IBM Case Manager solutions and their assets
- Identify IBM Case Manager environments
- Explore the IBM Case Manager Builder Step Designer

Structure of a solution

Unit summary

Unit 5 Add runtime tasks

IBM Training

IBM

Add runtime tasks

IBM Case Manager V5.3.2

IBM Training

Unit objectives

- Add a custom task
- Add a quick task

Add runtime tasks

Unit objectives

IBM Training

What are custom tasks?

- Custom tasks enable case workers to create tasks for activities that are not defined in the solution.
- Case workers add custom tasks to a case during run time.

Add runtime tasks

What are custom tasks?

Custom tasks provide case workers with the flexibility to create tasks for activities that are not already defined in the solution. For example, you might add a custom task to review a document that is not typically associated with a case.

Custom tasks are included in the case history.

You do not need access to IBM Case Manager Builder to add a custom task. The custom task is not added to the solution definition.

You use IBM Case Manager Client to create custom tasks.

When a custom task is added, it is included in the list of optional tasks for the case. When the task is started, it is included in the list of required tasks for the case.

A case worker must have Create Case privileges in order to start a task.

IBM Training

Adding a custom task

- To add a custom task, you:
  - search for an existing case instance
  - open the case instance
  - in the Case Details page, select Add Custom Task
  - use the Custom Task Editor to add the task

Add runtime tasks

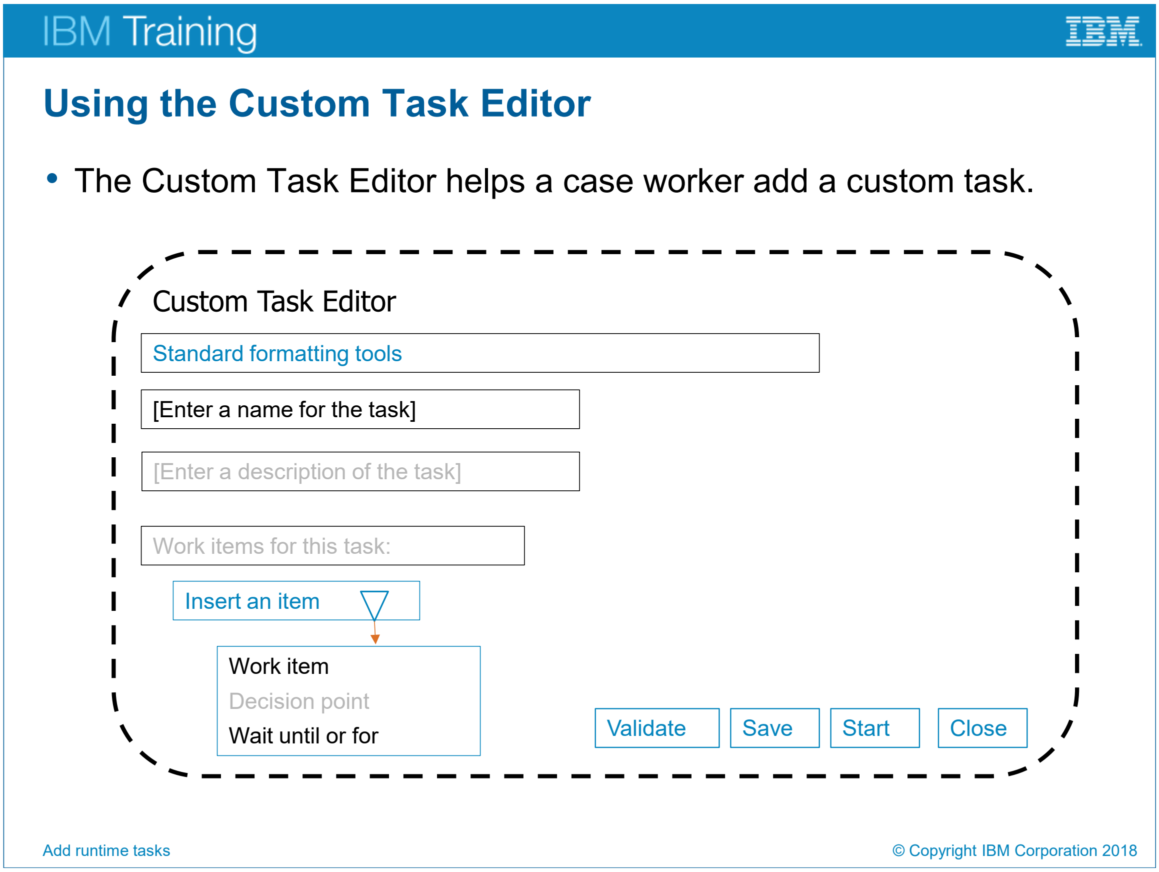
Adding a custom task

Case workers use IBM Case Manager Client to add a custom task.

You add a custom task to an existing case instance. You search for the case that you want and open it.

The default Case Details page includes the Add Custom Task button. A solution builder can change this default behavior. When you select, Add Custom Task, the Custom Task Editor opens and guides you through the steps to successfully add a custom task.

You can add a new custom task or copy an existing custom task. If you select an existing custom task, you can either save it to a new name, or update the existing one.



Using the Custom Task Editor

The diagram shows the basic elements of the Custom Task Editor.

The Custom Task Editor helps a case worker to successfully add a custom task.

At the top is a toolbar of standard formatting tools.

The required steps are displayed in a darker font. The optional steps are greyed out.

You must enter a name for the task. A description of the task is optional.

Then, you insert an item to add activities to the task.

The first work item cannot be a decision point. You must add a work item before you can add a decision point.

When you choose a work item, you are prompted for:

- title for the work item

  When you start typing the title of the work item additional icons display on the right to:

  - select the properties that can be edited in the work item
  - set a deadline, in minutes, hours, days or weeks, to complete the work item

- who to assign the work item to
- optional instructions for the work item

After you add at least one work item, you can add a decision point. You use a decision point when an assigned user must enter a response to a work item. For example, you might create a decision point to approve a document that the user is to review. If you add a response, then you must add a child work item to that response, so the system knows what to do, and who to route it to when the response is selected.

The Custom Task Editor lets you add either a child work item or a new work item. It is easy to distinguish the two by the numbering. Each work item is numbered, 1,2,3, and so on. Child work items use outline numbering, for example 1.1, 1.1.1, or 1.2, and so forth.

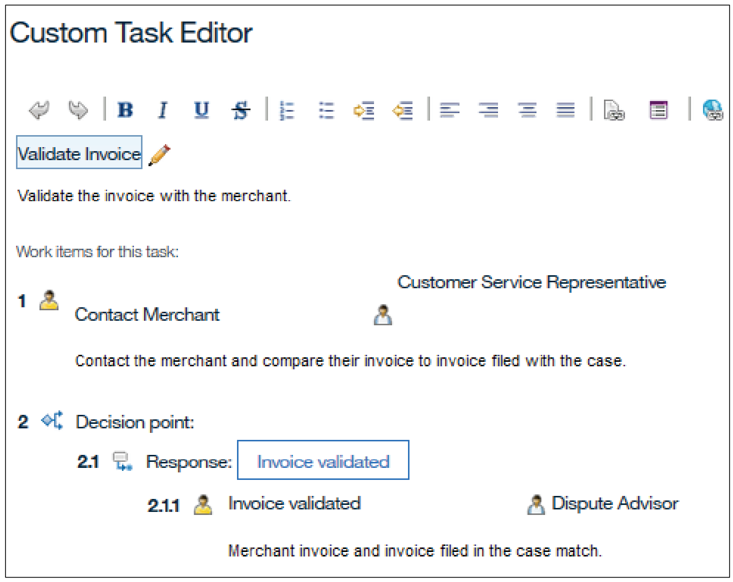
By default, the work items are run in the order they are entered. You can change the order by clicking the arrows to move the work items up or down.

The Custom Task Editor provides four options on the lower right. The options are:

- Validate: validates that the workflow is structured properly. Explicit error messages display to help you resolve any issues.
- Save: saves the custom task.
- Start: starts the custom task (the custom task can also be started later, from the Tasks tab of the Case Information widget).
- Close: close the custom task.

IBM Training

Demonstration 1: Add a custom task



Add runtime tasks

Demonstration 1: Add a custom task

Demonstration 1: Add a custom task

Purpose:
You are a Dispute Advisor for a bank and you are investigating a customer's credit card dispute. You want to assign the Customer Service Representative a task to contact the merchant and compare the merchant's invoice with the invoice filed in the case. However, the solution does not have such a task defined. You create a custom task and assign it to the Customer Service Representative.

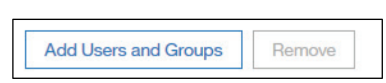
Task 1. Add an administrative account to multiple roles.

If you log in as a user that has administrative access to a solution, you can use the Manage Roles feature to add users to roles at runtime. You are going to add the administrative user, p8admin, to the Dispute Advisor and Customer Service Representative roles, so that you do not have to keep logging out and logging in to switch between the roles.

1. Open a Mozilla Firefox browser.
2. In the **Course Portal** Links, click **Case Client** to open IBM Case Manager Client.
3. Log in as a user with administrative access to the Credit Card Dispute solution.
   - User/Password: **`p8admin/FileNet1`**

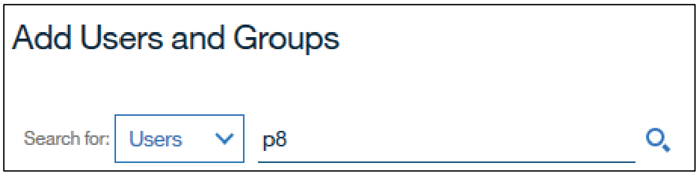
   In the Cases page, you see the message;

   You are not a member of a role that is associated with the following solution: Credit Card Dispute.

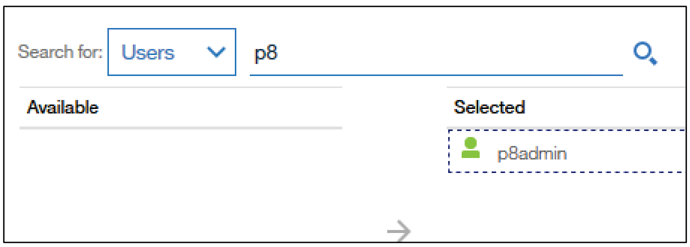
   This message appears because the p8admin user was not associated with any roles in the solution.
4. Click the arrow by **Credit Card Dispute**, on the upper right corner, and then select **Manage Roles**.
5. To add p8admin to the Dispute Advisor role, complete the following steps:
   - In the **Roles** selection panel, on the left, click **Dispute Advisor**.
   - On the main panel, click **Add Users and Groups** 

.

- To the right of the Users selector, type **`p8`**.



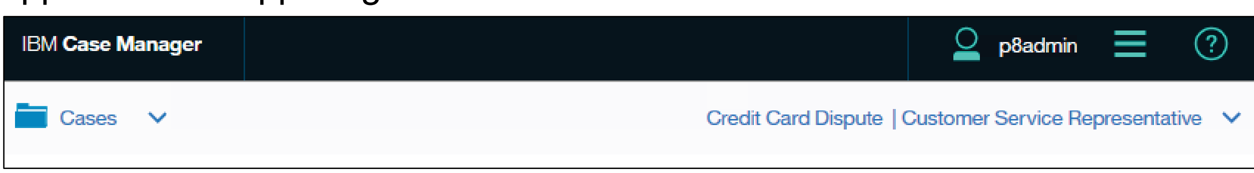
- Click the search icon on the right.
- Click the blue arrow, that is pointing right, to move p8admin from **Available** to **Selected**.



- Click **Add**.

6. Repeat Step 5 for the **Customer Service Representative** role.
7. Click **Save**.

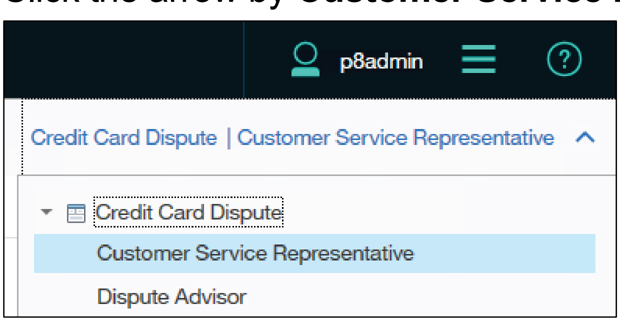
   The screen changes and you are in the Cases tab of Cases page. The role appears in the upper-right corner.



The Manage Roles feature is available by default, but a solution builder can customize the pages so the feature is not available.

Task 2. Search for the case as the Dispute Advisor.

1. Click the arrow by **Customer Service Representative**, on the upper-right.



2. Select the **Dispute Advisor** role.
3. Search for cases where **Customer Name** is **`Jerry`**.
4. In the resulting list, select the case that is in the **Complete** state.

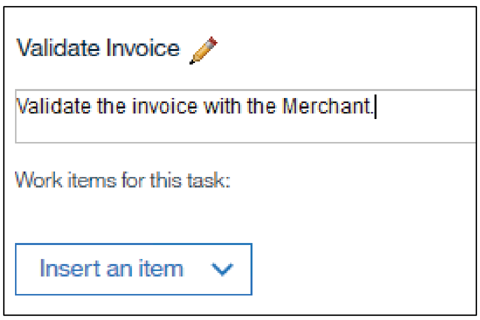
Task 3. Add a custom task and complete some basic fields.

In this task, you are going to add a custom task. Custom tasks are added from the Case Details page by default. The page can be customized by a solution builder.

1. In the toolbar, click **Add Custom task > New**.

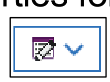
   The Custom Task Editor opens.

2. Click **[Enter a name for the task]** and type, `Validate invoice`.
3. For the description type, `Validate the invoice with the Merchant`.

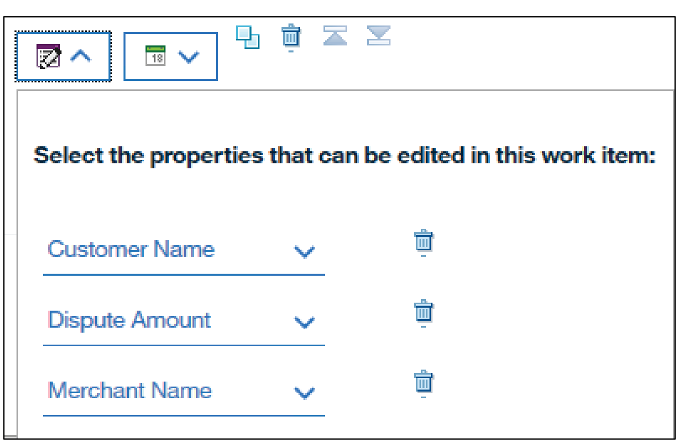


4. Click **Insert an item**, and then select **Work item**.
5. Click **[Click to enter title]** and type, `Contact merchant`.

   As soon as you start typing a title, more configuration options display.

6. Click **[Assign work item]** and click the arrow to select **Customer Service Representative**.
7. To select properties for this custom task, click **Editable properties for this work item** icon  to the right of the **Customer Service Representative** role, and click the arrow to select the following properties:

   - Customer Name
   - Dispute Amount
   - Merchant Name



8. Click **OK**.
9. Click the **Calendar** icon to add a deadline.
   - Set the deadline to **2 days**, and set a reminder for **1 day**.
   - Click **OK**.
10. Click **[Click to add instructions for this work item]** and type, **`Contact the merchant and compare their invoice to the invoice filed with the case.`**

    The field looks greyed out because it is an optional field.

    Leave the Custom Task Editor open for the next task.

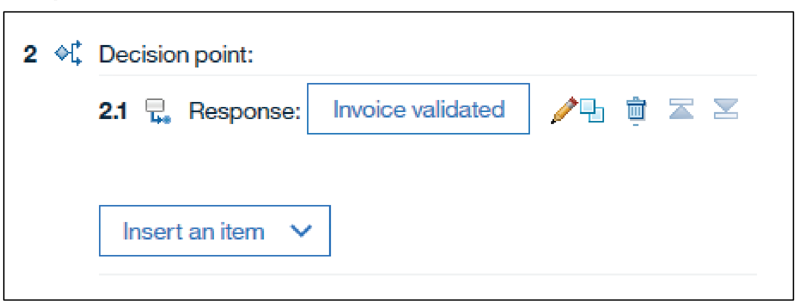
Task 4. Add a decision point to a custom task.

You can add a decision point to a custom task to configure responses for the work item.

1. Click **Insert an item** and select **Decision point**.
2. Click **Enter a button label**, and then type **`Invoice validated`**.

Now you define what action to take when the Invoice validated button is clicked.

3. Click item **2.1 Response**, then click **Insert an item** that is aligned with the response, and then select **Work item** to add a child work item.

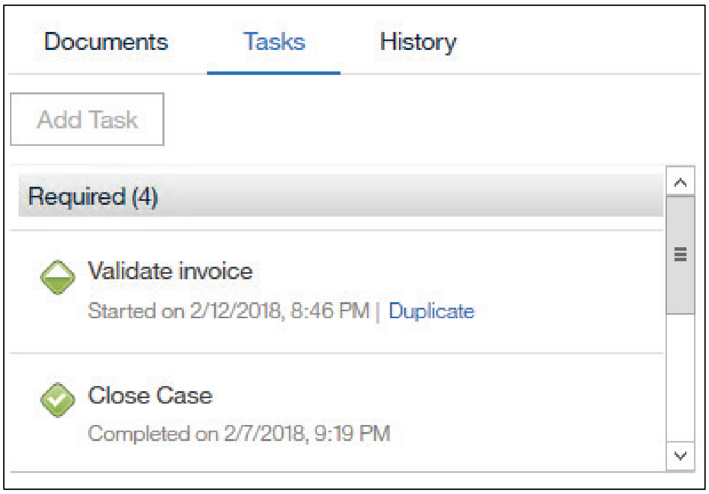


4. For the title type **`Invoice validated`**.
5. Assign the work item to the **Dispute Advisor**.
6. For the instructions type **`Merchant invoice and invoice filed in the case match`**.
7. Click **Save**, and then click **OK**.
8. Click **Validate** to validate the task.

   Make sure the message reads, *Validation succeeded*. If you get any errors, you need to resolve them. The error message should help you determine what needs to be fixed.
9. Click **OK**.

Task 5. Start the custom task.

1. Click **Start** to start the custom task.
2. Click **Yes** on the confirmation pop-up window.
3. In the Case Information widget, select the **Tasks** tab.
4. You see the **Validate Invoice** task processing.



5. Save and close the case.

Task 6. Process the custom task that you added.

1. Use the role selector to change roles to the **Customer Service Representative**.
2. Click the **Work** tab to access the Customer Service Representative in-basket.

   You see the **Contact merchant** step that was created by the custom task.
3. Open the **Contact Merchant** step.

   You see the instructions that you typed, the properties, and the response that you added to the custom task. For the sake of the demonstration, assume that you contacted the merchant and compared the two invoices.
4. Click the **Invoice validated** button.

   You created this button in the custom task.
5. Use the role selector to change roles to the **Dispute Advisor**.

   Since you assigned the work item to the Dispute Advisor, you need to check the Dispute Advisor's in-basket for work items.
6. Click the **Work** tab.
7. In the Dispute Advisor in-basket, open the **Invoice validated** step.

   You see in the instructions that the two invoices match. You do not see any properties, because you did not add any properties when you configured the work item.

8. Click **Complete**.
9. Log out of IBM Case Manager Client and close the browser window.

Results:
As the Dispute Advisor, you created a custom task to contact the merchant for a credit card dispute and assigned it to the Customer Service Representative.

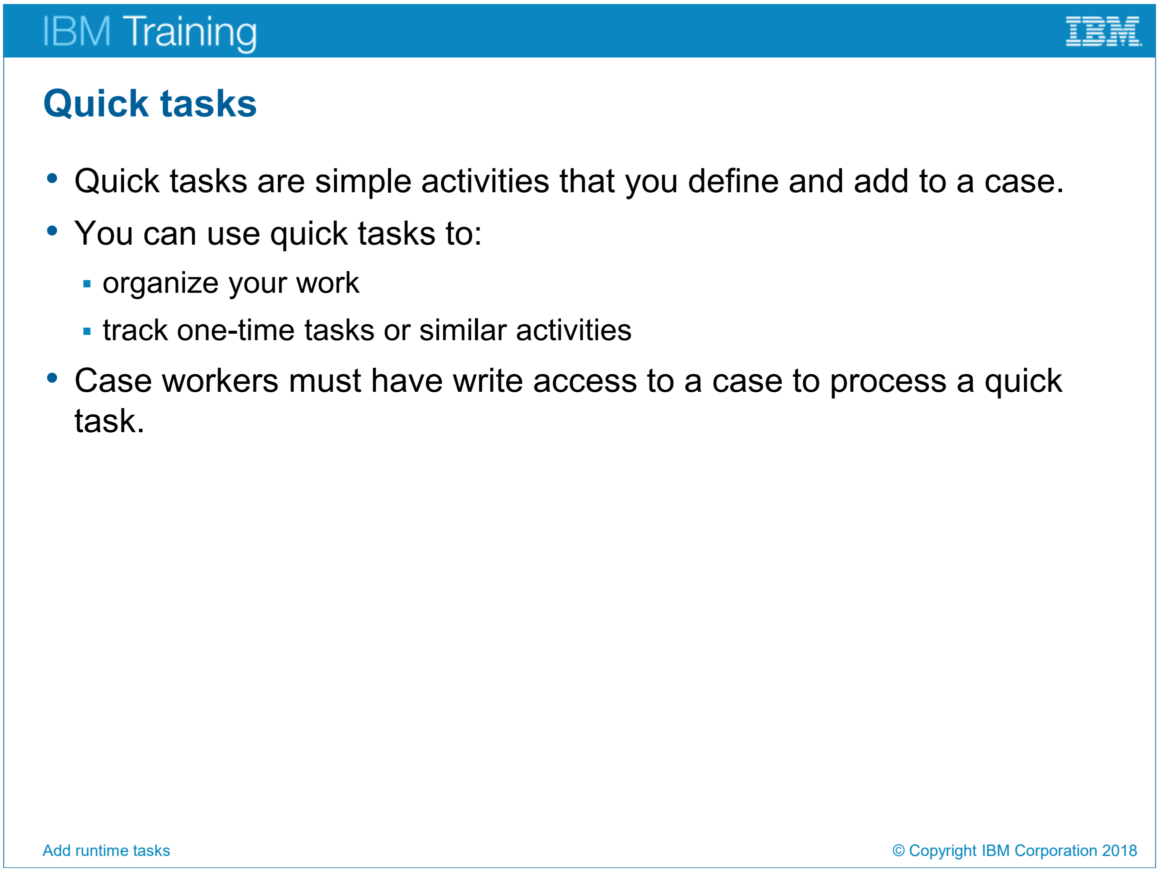
IBM Training

Enabling custom tasks

- The ability for case workers to create custom tasks is not enabled by default.
- The solution architect must enable custom tasks on each case type to allow case workers to create custom tasks.
- Case workers must have Create Case privileges to start the task.

Add runtime tasks

Enabling custom tasks



Quick tasks

For example, you might create a quick task to make a follow-up call to a client or to locate files that are needed for the case. Quick tasks are created within a case type.

Like custom tasks, a solution builder must enable quick tasks on each case type to allow case workers to create quick tasks.

IBM Training

Adding a quick task

- To add a quick task, you;
  - specify a name for the quick task
- After you add a quick task, you configure it.

Add runtime tasks

Adding a quick task

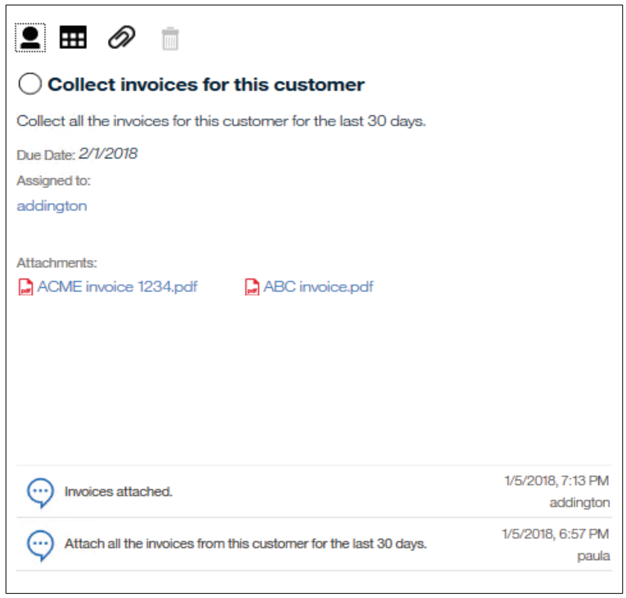
You add a quick task on the Case Details page. You enter a name for the quick task. You can repeat this step to add more quick tasks. After you create a quick task, then you need to configure it.

When you configure a quick task, you can:

- add a description
- set a due date
- assign the quick task
- add attachments

IBM Training

Demonstration 2: Add a quick task



Add runtime tasks

Demonstration 2: Add a quick task

Demonstration 2: Add a quick task

Purpose:
You are the Dispute Supervisor. You need the Customer Service Representative to attach all the invoices in the last 30 days to a case for a specific customer. The Credit Card Dispute solution does not have a task defined. You are going to create a quick task and assign it to the Customer Service Representative. You change roles to the Customer Service Representative, process the quick task, and complete it.

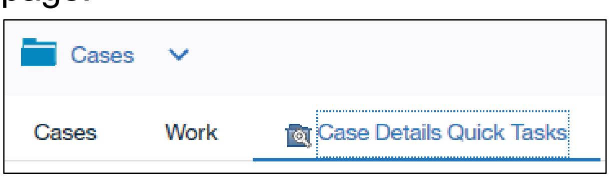
Task 1. Add a case of type Explore Quick Tasks.

1. Open IBM Case Manager Client.
2. Log in as the Dispute Supervisor,
   - User/Password: **`Paula/FileNet1`**
3. Add a case of case type, **`Explore Quick Tasks`**.
4. Set the **Customer Name** to **`John Jacobs`**.
5. Set the **Dispute Amount** to `275.00`.
6. Click **Add**.

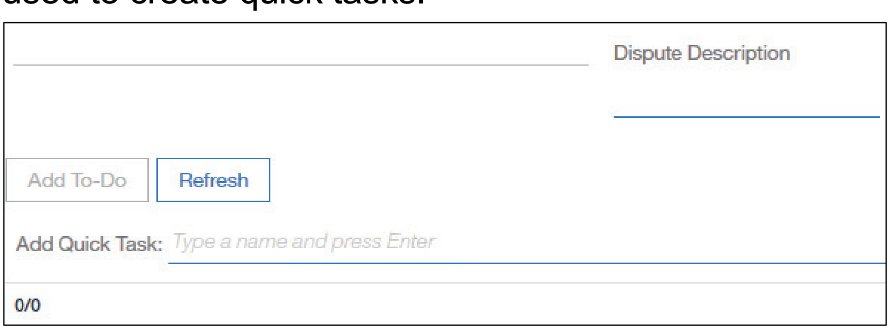
Task 2. Add a quick task to a case.

1. Search for a case where **Customer Name** is **`John`**.
2. Open the case with **Explore Quick Tasks** as the Case Type.

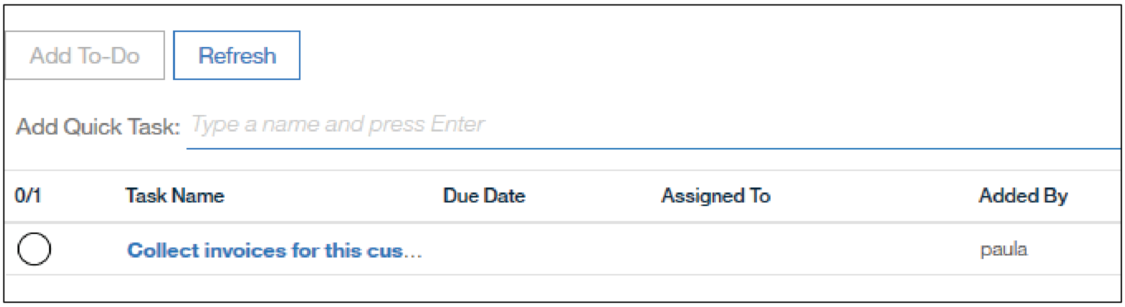
   The **Case Details Quick Tasks** page opens, this is a custom Case Details page.



   The Timeline Visualizer widget is replaced by the To-Do List widget, which is used to create quick tasks.

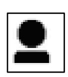


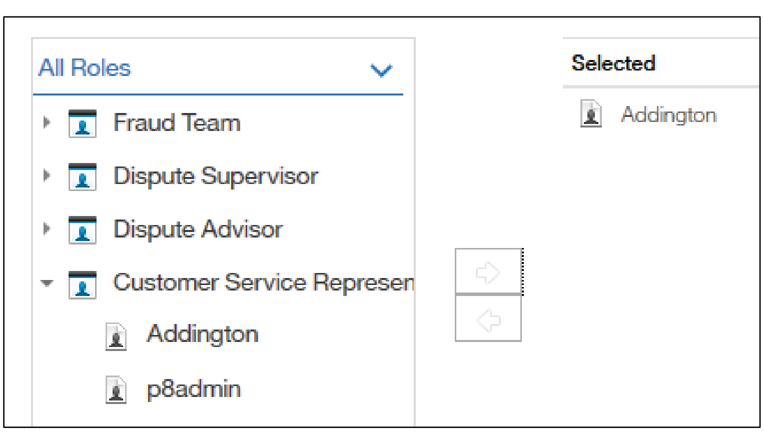
3. In the To-Do list widget, to the right of **Add Quick Task**, type `Collect invoices for this customer`.
4. Click **Enter**.
   The quick task that you added is listed.



5. Right-click the quick task that you created, and then select **open**.
   You can also click the quick task name.

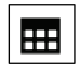
Task 3. Configure the quick task.

1. In the quick tasks wizard, click **Enter description**, and then type `Collect all the invoices for this customer for the last 30 days.`
   The field, Enter a description, is grey because it is not a required field.
2. To assign the task to the Customer Service Representative, complete the following steps:
   - Click the **Person** icon .
   - Click **select**.
   - In the window that displays, expand **Customer Service Representative**.
   - Select **Addington**, and move the user to the **Selected** column by clicking on the right arrow.



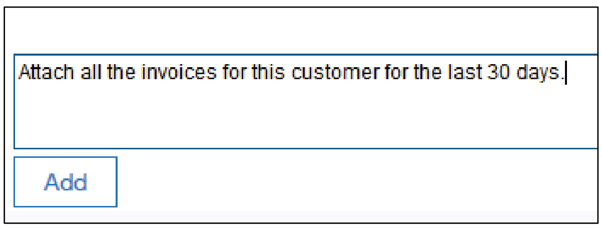
   - Click **OK**.

3. To assign a due date for the quick task, complete the following steps:

   - Click the **Calendar** icon .
   - Use the calendar selector to choose a date. For example, **April 1, 2018**.

   Write a comment for the Customer Service Representative.

4. In the lower part of the window, where it says Write a comment, type **`Attach all the invoices for this customer for the last 30 days.`**

5. Click **Add**.

   You see the comment added, with the date and time stamp and the user that created it.

6. Click **Done**.
7. Close the case.
8. Log out of IBM Case Manager Client.

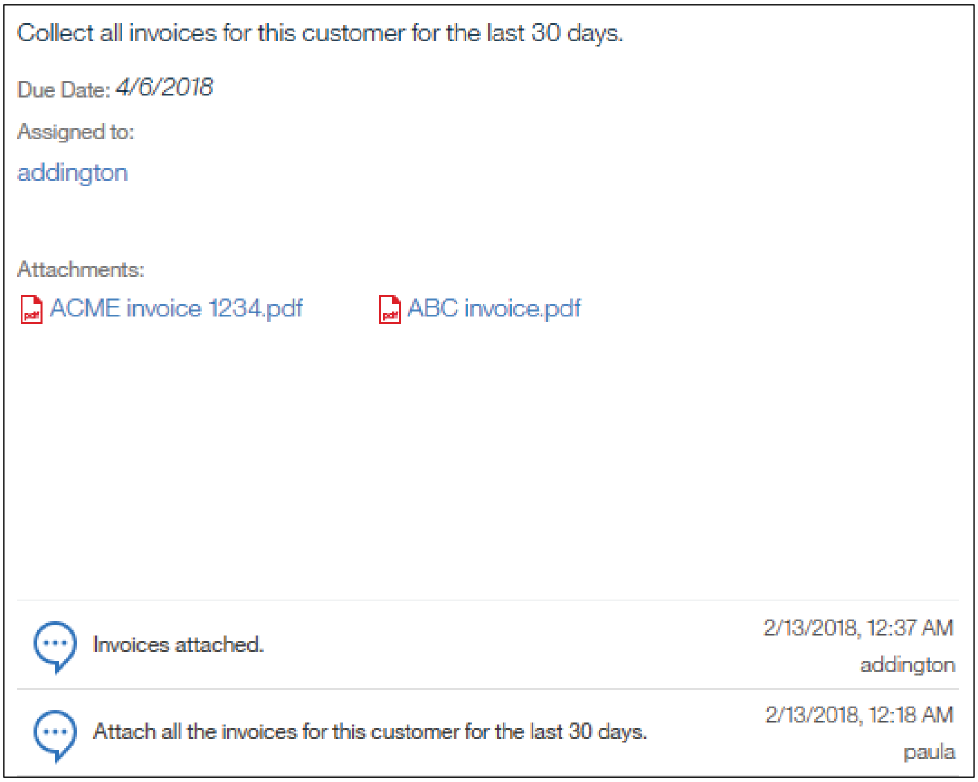
Task 4. Process the quick task.

1. Log in as the Customer Service Representative,
   - User/Password: **`Addington/FileNet1`**
2. Search for cases where **Customer Name** is **`John`**.
3. Open the case with **Explore Quick Tasks** as the Case Type.
4. In the To Do List widget, click the **Collect invoices for this customer** quick task.
5. Click the **Paperclip** icon , and then select **Add Document from Local System**.

   If you choose the Add Document from Case option, you can attach a document from the case. In this situation, the option is greyed out because the case does not have any documents.

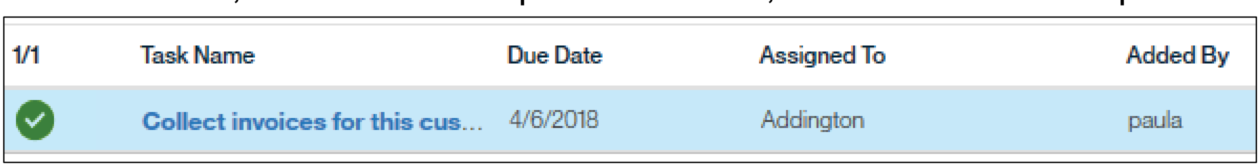
6. Browse to **C:\Training\F2900**.
7. Select the two pdf files, and then click **Open**.
8. Click **Add**.
9. In the comment box, add the comment **`Invoices attached`**.

10. Click **Add**.



The most recent comment is listed first.

11. Click **Done**.
12. Click the circle, to the left of the quick task name, to mark the task complete.



13. Close the case, log out of IBM Case Manager Client, and close the browser window.

Results:
As the Dispute Supervisor, you created a quick task and assigned it to the Customer Service Representative. As the Customer Service Representative, you processed the quick task, by attaching two invoices to the case, and completing the quick task.

IBM Training

Unit summary

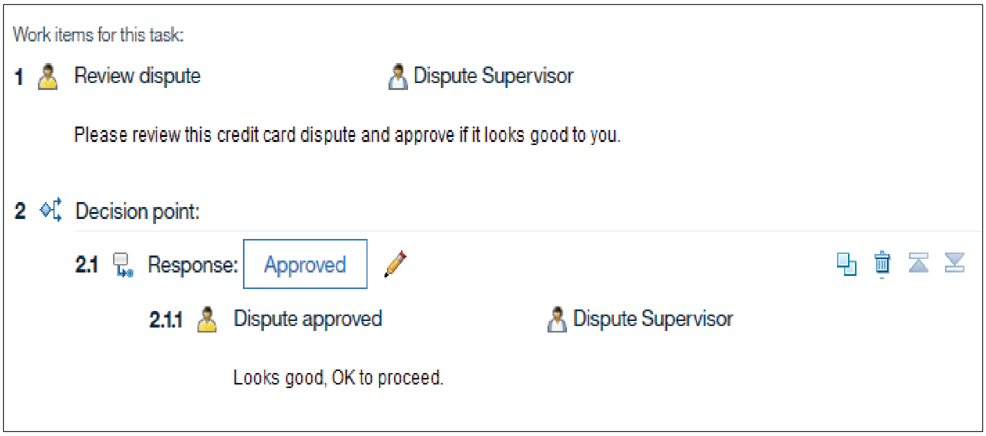
- Add a custom task
- Add a quick task

Add runtime tasks

Unit summary

IBM Training

Exercise 1: Add a custom task



Add runtime tasks

Exercise 1: Add a custom task

Exercise 1: Add a custom task

A customer, named Janice Jenkins, contacts the Customer Service Representative with a credit card dispute. The customer provides the following dispute information:

- Credit Card Number: **`1234-3434-5656-6767`**
- Contact Phone Number: **`777-777-7777`**
- Dispute Description: **`Merchant double charged.`**
- Dispute Amount: **`250.00`**
- Merchant Name: **`ABC Company`**

The Customer Service Representative creates the case. Then, completes the Gather Dispute Information step by adding the information provided by the customer and sends the case to the Dispute Advisor.

The Dispute Advisor opens the new work item in the in-basket. After reviewing the dispute, the Dispute Advisor wants the Dispute Supervisor to review the dispute and approve it, before continuing to process the work item. The Dispute Advisor creates a custom task using the following data:

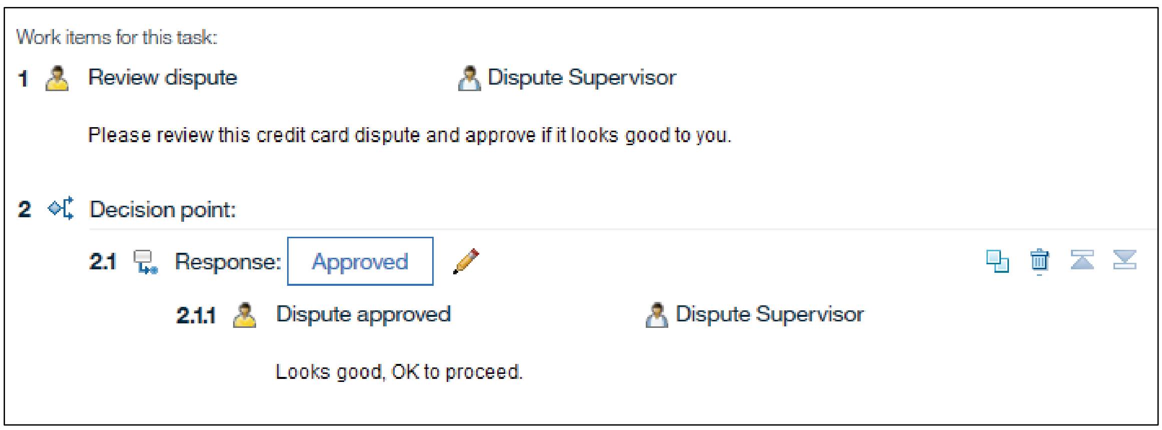
- Custom task name: **`Review and approve`**
- Description: **`Review and approve credit card dispute.`**

The Dispute Advisor adds a work item to the custom task using the following data:

- Title: **`Review dispute`**
- Assign to: **`Dispute Supervisor`**
- Properties: **`Account ID`**, **`Customer Name`**, **`Dispute Amount`**, **`Dispute Description`**, **`Merchant Name`**
- Deadline: **`2 Days`**
  - Set reminder: **`1 Days`**
- Instructions: **`Please review this credit card dispute and approve if it looks good to you.`**

The Dispute Advisor adds a decision point for the Dispute Supervisor to respond, using the following data:

- Response: **`Approved`**
- Work item:
  - Title: **`Dispute approved`**
  - Assign to: **`Dispute Supervisor`**
  - Instructions: **`Looks good, OK to proceed.`**



The Dispute Advisor starts the custom task.

The Dispute Supervisor finds a Review dispute work item in the in-basket.

User Accounts:

- Administrative User/Password: **`p8admin/FileNet1`**
- Dispute Supervisor User/Password: **`Paula/FileNet1`**

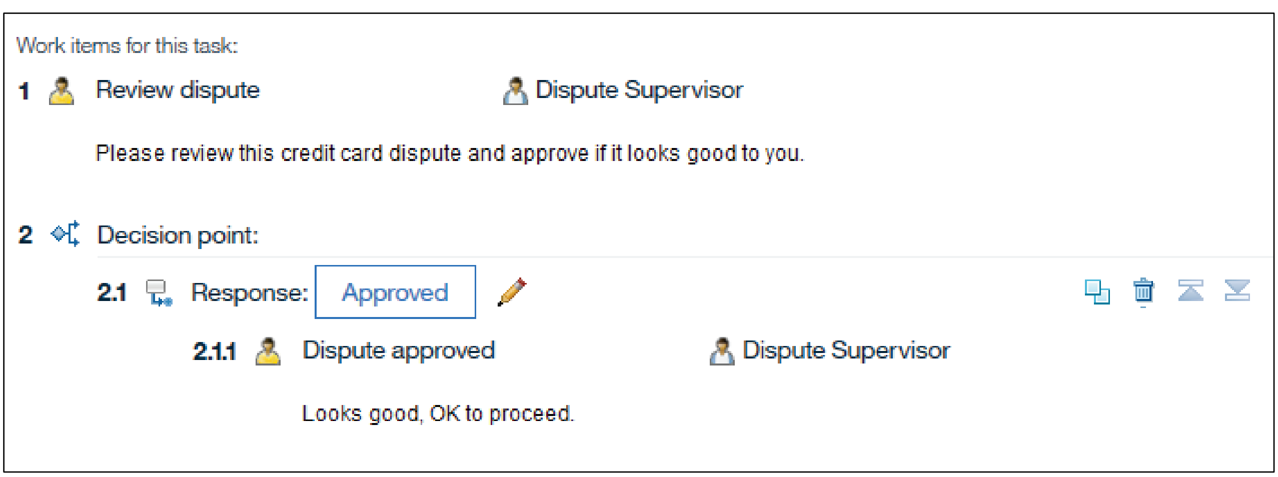
Exercise 1: Tasks and results

Task 1. Add a Credit Card Dispute case.

- Open IBM Case Manager Client and log in as `p8admin/FileNet1`.
- Set the role to **Customer Service Representative**.
- Add a case of type, **Manage Dispute Item** for the customer, `Janice Jenkins`.
- Process the **Gather Dispute Information** step using the data provided in the exercise introduction, and then send the case to the **Dispute Advisor**.

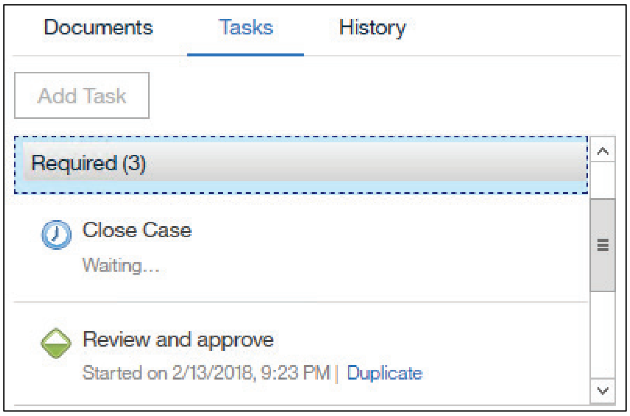
Task 2. Add a custom task.

- Switch role to **Dispute Advisor**.
- In the **Cases** tab, search for cases where **Customer Name** starts with **Janice**.
- Add a custom task:
  - Name: `Review and approve`
  - Description: `Review and approve credit card dispute.`
- Add a work item to the custom task using the data provided in the exercise introduction.
- Add a decision point to the custom task using the data provided in the exercise introduction.



- **Save**, **Validate**, and **Start** the custom task.

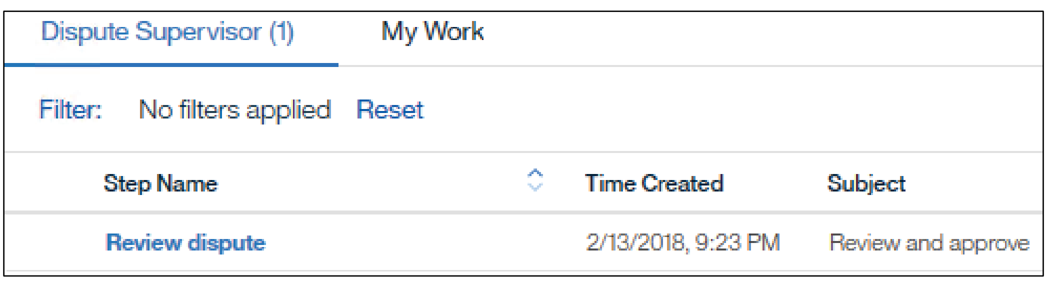
- Verify that the task started in the **Tasks** tab of the Case Information widget.



- Log out.

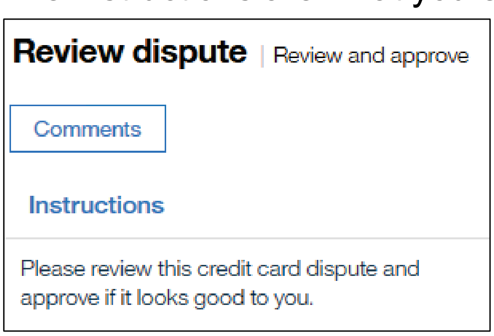
Task 3. Verify that the task is in the Dispute Supervisor's in-basket.

- In IBM Case Manager Client, log in as `Paula/FileNet1`.
- In the Work tab, verify that you have a **Review dispute** work item.

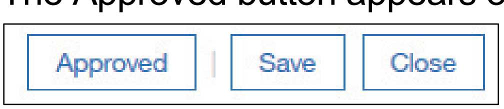


- Open the work item and verify the results.
- At the end of the exercise, the results appear as follows:

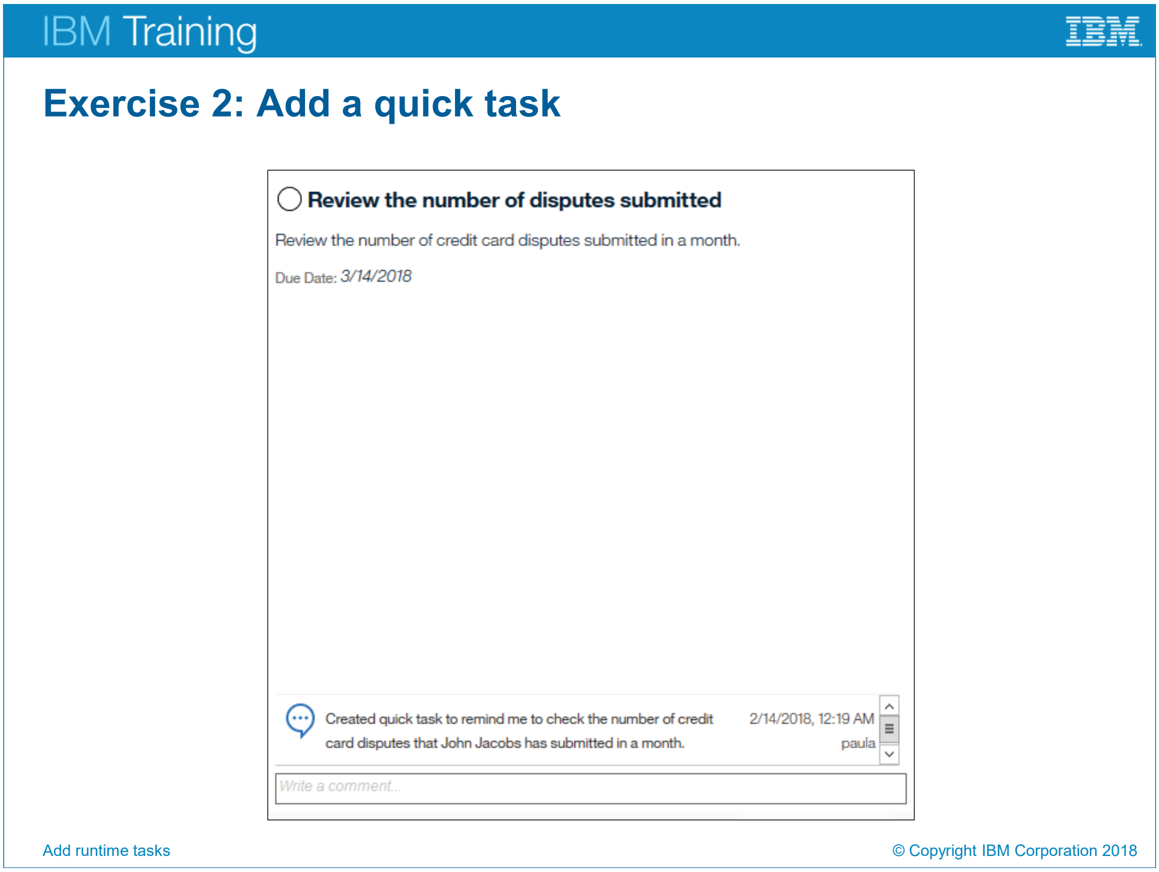
  The instructions are what you entered for the custom task.



  The Approved button appears on the upper right.



- Close the case and log out.



Exercise 2: Add a quick task

Exercise 2:
Add a quick task

The Dispute Supervisor of a bank is concerned that a certain customer might be submitting fraudulent credit card disputes. The Dispute Supervisor decides to create a quick task reminder to check, in a month, how many invoices the customer opened.

- Dispute Supervisor User/Password: **`Paula/FileNet1`**

The Dispute Supervisor searches for an existing case, with the case type, Explore Quick Tasks, for John Jacobs. The Dispute Supervisor adds a quick task to the case, using the following data:

- Quick task name: **`Review the number of disputes submitted`**
- Description: **`Review the number of credit card disputes submitted in a month.`**
- Deadline: Select a date one month from the current date.
- Comment: **`Created quick task to remind me to check the number of credit card disputes that John Jacobs has submitted in a month.`**

Exercise 2: Tasks and results

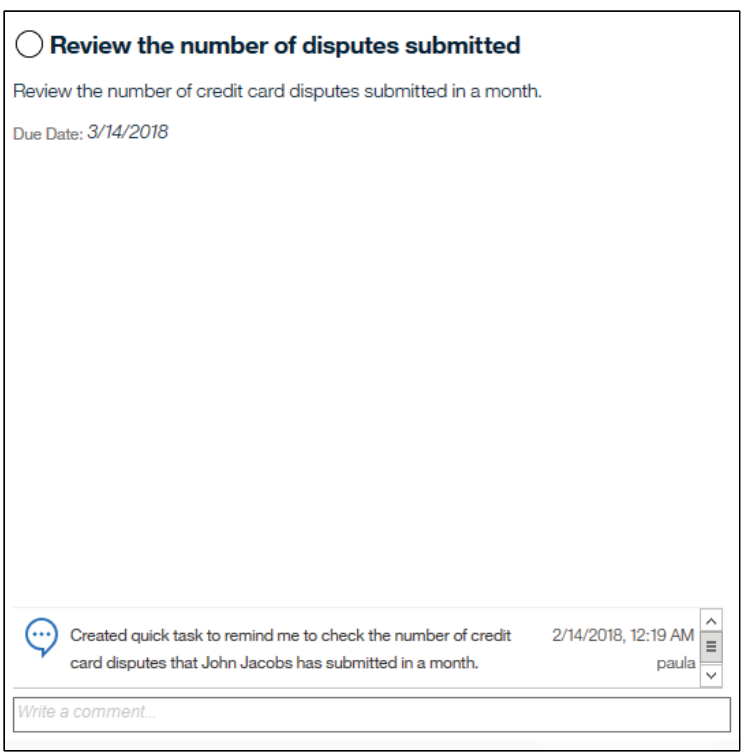
Task 1. Add a quick task to an existing case.

- In IBM Case Manager Client, log in as, **`Paula/FileNet1`**.
- Search for cases with Customer Name starting with **`John`**.
- Open the case with **Explore Quick Tasks** as the Case Type.
- Add a quick task with name: **`Review the number of disputes submitted`**

Task 2. Configure the quick task.

- Open the quick task you added.
- Use the data provided in the exercise introduction to add a description, deadline, and comment.

  At the end of the exercise, the results appear similar to the following:



- Click **Done**.
- Save and close the case.
- Log out.
- Close the browser window.

Unit 6 IBM Case Manager integration options

IBM Training

IBM Case Manager integration options

IBM Case Manager V5.3.2

IBM Training

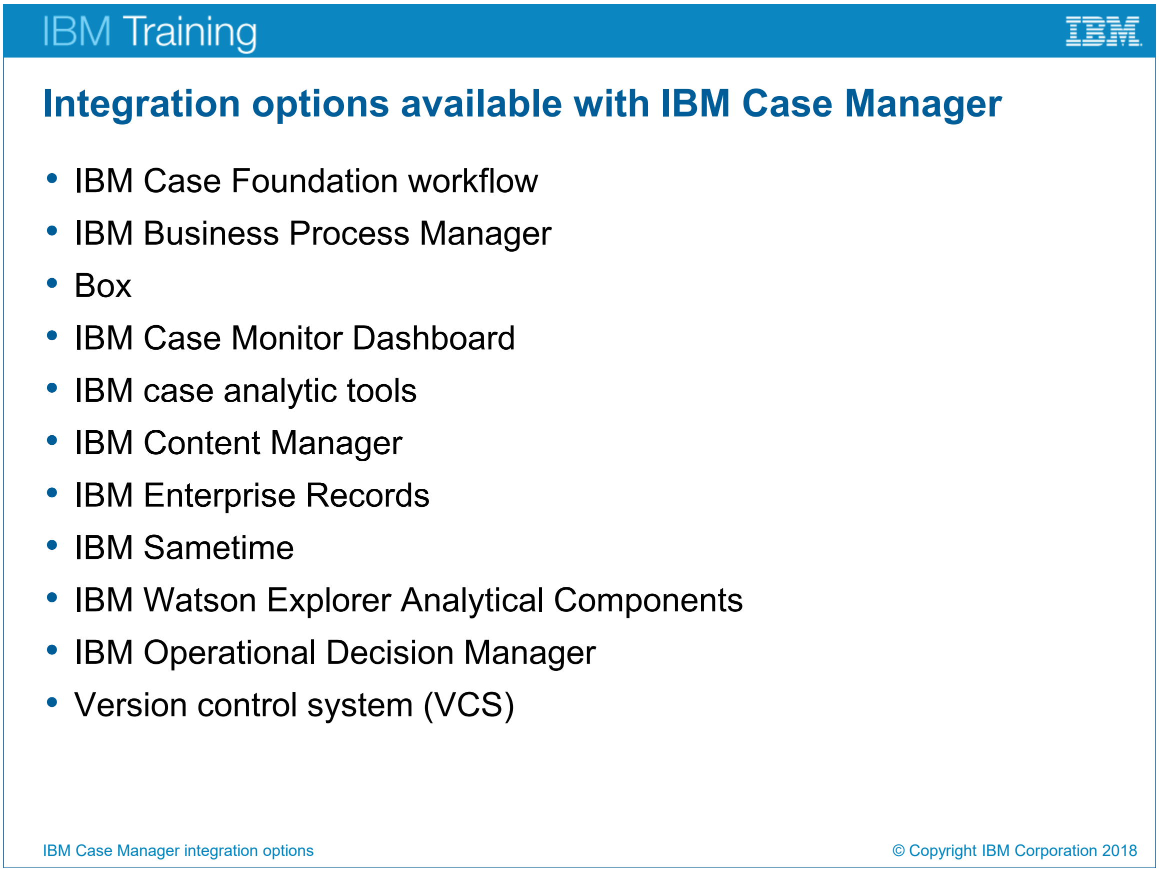
Unit objectives

- Identify IBM Case Manager integration options

IBM Case Manager integration options

© Copyright IBM Corporation 2018

Unit objectives



Integration options available with IBM Case Manager

You can further enhance your case management solution by integrating add-on products.

IBM Training

IBM Case Foundation workflow integration

- Two ways to use IBM Case Foundation workflow integration:
  - Extend an existing task by editing the task with Process Designer
    - add a custom component
    - call an external web service
  - Define existing IBM Case Foundation workflows as tasks in your solution

IBM Case Manager integration options

IBM Case Foundation workflow integration

IBM Training

IBM Business Process Manager integration

- You can map a task in IBM Case Manager to an existing IBM Business Process Manager (BPM) process.
- Case workers can view IBM Case Manager and IBM BPM work items simultaneously from the same integrated view.

IBM Case Manager integration options

IBM Business Process Manager integration

IBM Case Manager integrates with IBM Business Process Manager. You can use existing IBM Business Process Manager (BPM) workflows in your IBM Case Manager solutions. In IBM Case Manager, you define a task to map to the IBM Business Process Manager workflow.

IBM Training

Box integration

- The Box integration enables case workers to collaborate with external users.
- Two ways to set up the Box integration:
  - Box collaboration
    - case workers and external users can use Box to exchange documents
  - Use Box as an external repository for IBM Case Manager
    - enable case types to support external documents
    - share case documents or attachments

IBM Case Manager integration options

Box integration

If you enable the Box integration, case workers can associate a case with a Box folder so that internal and external users can exchange content. For example, a customer service representative at an automobile insurance company receives a new claim request. The customer service representative creates a Box collaboration folder for the case, and invites the claimant to be a collaborator on the folder. The customer service representative copies a claims form to the Box folder and then assigns a task to the claimant to complete and return the claims form.

IBM Training

IBM Case Monitor Dashboard integration

- Use IBM Case Monitor Dashboard to view business activity data for IBM Case Manager solutions.
- IBM Case Monitor dashboard:
  - is an IBM Content Navigator desktop
  - contains widgets that display case and task activity across solutions

IBM Case Monitor Dashboard integration

You can use IBM Case Monitor Dashboard to view business activity data that is specific to case management systems. You can use this data to review volume, find and eliminate bottlenecks, and ensure that operations are working efficiently and effectively.

IBM Case Monitor Dashboard retrieves data about the solutions that are deployed to a target object store from the Case Analyzer store that you configure for that object store. In the dashboard, users can switch between Case Analyzer stores to obtain information about solutions in different target object stores.

IBM Training

IBM case analytic tools integration

- IBM case analytic tools help you monitor and manage your daily business operations.
- The following tools use the data that is extracted by the Case Analyzer services:
  - Case Analyzer Excel Reports
  - Cognos Business Intelligence

IBM Case Manager integration options © Copyright IBM Corporation 2018

IBM case analytic tools integration

The tools can also provide historical trend information that enables you to adjust future operations as needed.

With the data extracted by Case Analyzer services, you can generate real-time reports and historical data analysis by analyzing case, task, and workflow events. The Case Analyzer component integrates with Cognos Business Intelligence to provide web-based analytic and reporting capabilities. It also supports using Microsoft Excel as a thick client-based analytic and reporting solution.

IBM Training

IBM Content Manager integration

- Integrating with IBM Content Manager, lets you use documents that are stored in IBM Content Manager in your IBM Case Manager solutions.
- You can create cases, add documents to cases, and delete documents from cases based on actions that are done on IBM Content Manager items.

IBM Case Manager integration options

IBM Content Manager integration

For example, you can configure a solution so that when a case worker creates a document with an IBM Content Manager item type, a new case is created in IBM Case Manager.

IBM Training

IBM Enterprise Records integration

- Use the IBM Enterprise Records integration to declare IBM Case Manager documents as records.

IBM Case Manager integration options

IBM Enterprise Records integration

The record is stored in the IBM Enterprise Records file plan object store.

IBM Training

IBM Forms integration

- You can integrate IBM Forms with IBM Case Manager to use forms with your solutions.
- IBM Forms can provide:
  - customizable interfaces
  - automation features such as:
    - custom field formats
    - custom field validation
    - calculation engine
  - form templates
  - form data documents
- You can configure solutions to use the Form widget instead of the Properties widget.

IBM Case Manager integration options

IBM Forms integration

If you use the IBM Forms integration, you can use forms developed in IBM Forms to enable case workers to view and edit property values for a case or a work item.

IBM Training

IBM Sametime integration

- Use the IBM Sametime integration to enable case workers to:
  - check whether other workers, who are involved in a case, are logged in to the application
  - chat with other case workers in an instant messaging window

IBM Sametime integration

IBM Training

IBM Watson Explorer Analytical Components integration

- Use the IBM Watson Explorer Analytical Component integration to provide unstructured analytics based on textual pattern discovery.
  - includes a crawler that is specific to case management solutions

IBM Case Manager integration options

IBM Watson Explorer Analytical Components integration

IBM Training

IBM Operational Decision Manager integration

- Use the IBM Operational Decision Manager integration to add external business rules to your IBM Case Manager solutions
- Supports dynamically changing the business rules independent of the solution design

IBM Case Manager integration options

IBM Operational Decision Manager integration

If you integrate your IBM Case Manager system with IBM Operational Decision Manager (ODM), you manage your business rules from IBM ODM. IBM ODM provides more sophisticated decisions and a full range of management capabilities. You can change the business rules, independent of the solution design.

IBM Training

Version control system integration

- You can integrate IBM Case Manager with a version control system (VCS) such as:
  - IBM Rational Team Concert
  - PTC Integrity
- You can keep a record in the VCS of the changes made to a solution over time.

Version control system integration

Apply your knowledge

Use the questions in this section to test your knowledge of the course material. For each question, indicate the correct answer or the best answer.

Question 1: What does the Box integration with IBM Case Manager support?

A. Chatting with other case workers that are involved in a case.
B. Collaborating with external users within a case.
C. Mapping a task in IBM Case Manager to a task in Box.
D. Viewing business activity data for IBM Case Manager solutions.

Question 2: What is the benefit of integrating IBM Case Manager with IBM Content Manager?

A. You can manage IBM Case Manager solutions from the IBM Content Manager user interface.
B. You can use documents that are stored in IBM Content Manager in your IBM Case Manager solutions.
C. You can create the IBM Case Manager design object store as an IBM Content Manager repository
D. You can save your IBM Case Manager solutions in IBM Content Manager repositories.

Question 3: Which IBM Case Manager integration enables you to monitor your daily business operations?

A. IBM Business Process Manager
B. IBM Case Monitor Dashboard
C. IBM Enterprise Records
D. IBM case analytic tools

Question 4: The IBM Operation Decision Manager integration with IBM Case Manager supports adding business rules to your IBM Case Manager solutions. (True or False)?

Answers to questions

Answer 1: B. Collaborating with external users within a case.

Answer 2: B. You can use documents that are stored in IBM Content Manager in your IBM Case Manager solutions.

Answer 3: D. IBM case analytic tools

Answer 4: True

IBM Training

Unit summary

- Identify IBM Case Manager integration options

IBM Case Manager integration options

Unit summary

IBM Training