



Business Partner Field Enablement Workshop

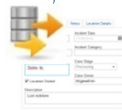


IBM Case Manager 5.2.1 New Feature Overview

ICM 5.2.1



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From Other
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Favorites and
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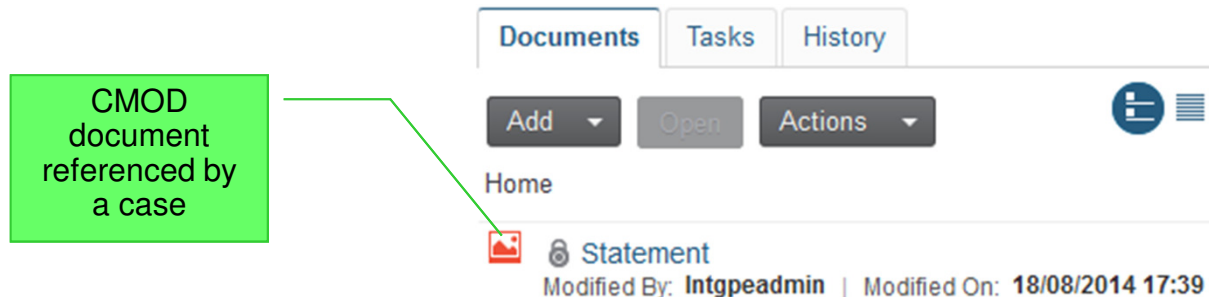
Expanded
Platform Support

Include Content From Other Repositories

- General Use Case
 - *Many organizations store their documents in multiple repositories*
 - *This is often due to:*
 - *Specialized storage such as IBM CMOD*
 - *Departmental partitioning*
 - *Mixed vendor products*
 - *Legacy repositories still in use*
 - *Cases often contain an aggregation of documents from many sources*
- Specific Use Case
 - *A banking customer opens a credit card dispute case*
 - *The case contains a scan of the customer's invoice*
 - *It also includes the customer's credit card statement that resides in CMOD*
 - *Case knowledge workers can interact in the same way with both these documents regardless of their actual source*
 - *External documents do not need to be copied (duplicated) into the case*

Include Content From Other Repositories

- From Case Builder, a Solution Creator can
 - Mark a case type as allowing external documents to be filed or added as attachments
- From ICN Admin, an Administrator can
 - Configure a Desktop to include the repositories where users can file external documents from – including all repository types supported by ICN (CM8, CMIS, other P8 object stores, CMOD)
- From Case Client, a Case Worker can
 - Search for documents from another repository to add them to the case or attach to a workflow
 - Interact directly with the document, such as modifying properties, viewing the content, versioning, and interacting with the document as an attachment



Include External Data in Property Views

- General Use Case
 - *Most organizations maintain several “systems of record” data sources*
 - *These data sources often contain the most current “single source of truth”*
 - *Easy access to this information helps case workers complete their work*
 - *It is often necessary, and efficient, to access this data live and not store a copy*
- Specific Use Case
 - *While working a claim for a customer, an agent opens the case details*
 - *Along side the claim specific data, the agent sees the customer’s contact information, pulled live from their client database*
 - *A list of past transactions is also conveniently displayed, saving the agent from having to access another system*

Include External Data in Property Views

- Placeholder added to a property view
- A script is added to the page that gets data from another system based on one of the existing case properties
- The returned data is mixed into the view with the case properties
- The external property is never persisted with the case data itself and is always accurate
- External properties can be both read-only and read-write

The screenshot displays the IBM Case Manager interface. At the top, a 'Settings' panel is open, showing 'External Property Settings'. The 'Collection ID' is set to 'External', the 'Property ID' is 'EXT_ContactPhone', the 'Type' is 'String', and 'Multiple values' is unchecked. The 'Property Settings' section shows the 'Label' as 'Contact Phone'. Below this, a property view is shown with a 'Contact Phone' field containing 'No value'. A green box with the text 'External property placeholder added to view' points to this field. At the bottom, the 'Overview' tab is selected, showing a form with fields for 'Contact Name' (Dave), 'Contact email' (dperman@ca.ibm.com), 'Location', 'Contact Phone' (949-555-1212), 'Incident Date' (30/07/2014), and 'Incident Category'. A green box with the text 'External property value set at runtime' points to the 'Contact Phone' field in the form.

Push In-baskets

- General Use Case
 - *Teams of heads down task workers process items from shared queues of work in support of driving a case to completion*
 - *Some of these workers may decide to open items of lower priority or ones that, from their experience, are easier to complete*
 - *Hiding the list of items and delivering them in a prioritized way ensures work is being performed in an optimal way*
- Specific Use Case
 - *An insurance claims processor's performance is measured by number of claims they review*
 - *Experienced processors are able to recognize claims that typically take longer to process*
 - *Providing a simple "get next" button that hands out the next item in the sorted queue ensures an even distribution of work*

Push In-baskets

- Work items are not shown in the in-basket
- Users click a button to start processing work
- Ordering of delivered items is controlled by in-basket configuration
- Works in conjunction with the step's "Get next" feature

IBM Case Manager

Intgpeadmin

Cases Call Center Work

Incident Management | Call Center

Manage Roles Add Case Start Processing Work

Call Center (3) My Work (0)

Please click the **Start Processing Work** button above to get your first work item.

Have a great day!

Add your own custom message

Add your own custom message

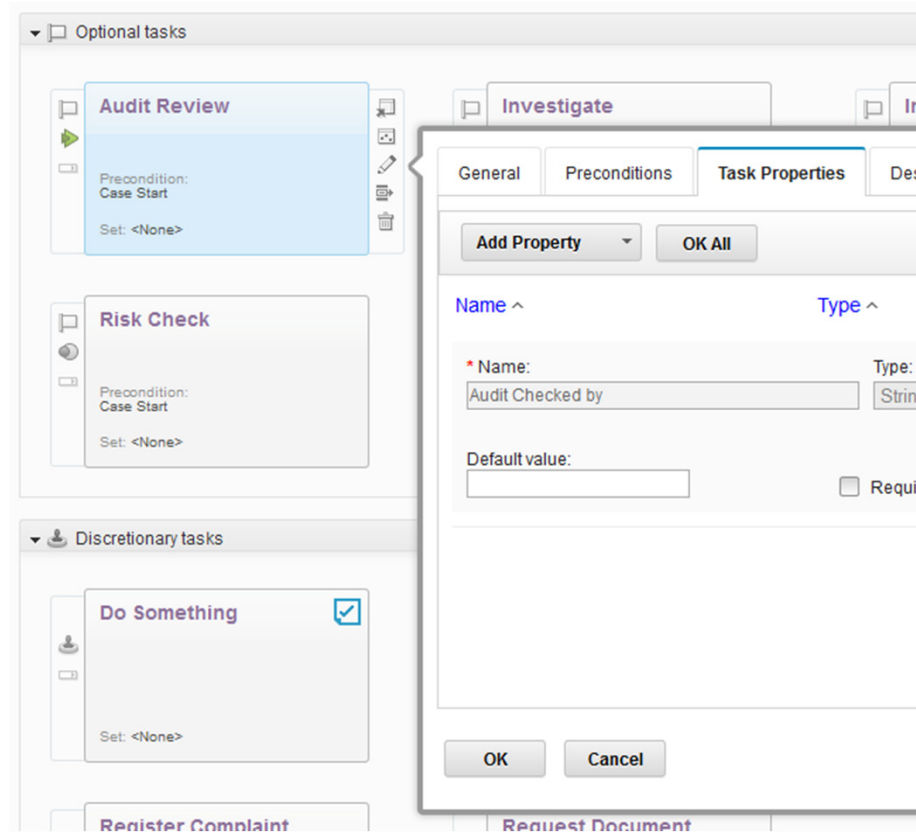
Hide list contents configuration option

Task Properties

- General Use Case
 - *Case tasks, particularly ones that might repeat, may need to capture and store data specific to that task for reporting or auditing*
 - *Various complex workarounds were often used, resulting in the data being persisted in unique ways*
- Specific Use Case
 - *A repeatable task is used to automate the arrival and review of documents added to the case folder*
 - *During the review steps, some information about the document is entered in task property fields that are displayed to the end user*
 - *When the task and its workflow complete, the data is already stored with the task object with no additional development work required*

Task Properties - Design

- Can be added to any task type
- Add to property views like any other case or workflow data field
- Task property data can be accessed in Process Designer using the `F_CaseTask.taskProp` notation in pre or post assignment expressions



Task Properties - Runtime

- Displayed in any property view as designed along with other case properties or workflow data fields

The screenshot shows the IBM Case Manager interface for an 'Audit Review' task. A vertical sidebar on the left contains icons for navigation, including a gear icon. Two green callout boxes with lines pointing to the sidebar provide context:

- Case properties stored on the case folder**: Points to the gear icon in the sidebar.
- Task property stored on the task instance**: Points to the 'Audit Checked by' field in the form.

The form itself contains the following fields and values:

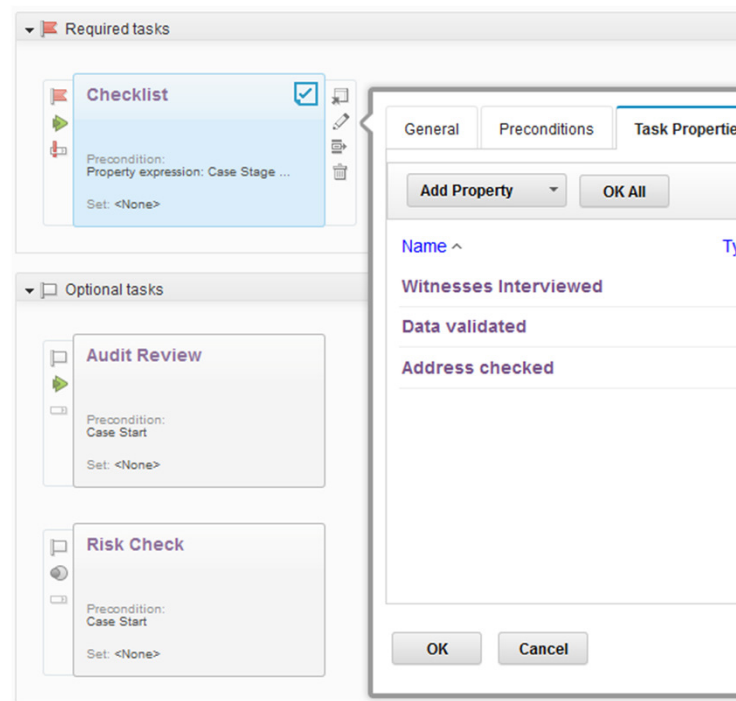
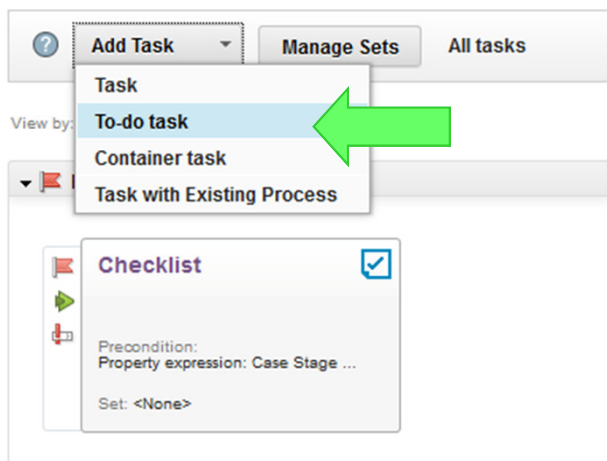
Audit Review Audit Review	
Comments Meeting	
Overview	Witnesses Notes Location
Contact Name	Incident Date
Mike	12/08/2014
Contact email	Incident Category
mike@mymail.com	
Location	* Case Stage
Columbus, OH	Investigating
<input checked="" type="checkbox"/> Location Visited	Case Owner
	Intgpeadmin
Description	
Lost ball	
Audit Checked by	
Dave	

To-do Tasks

- General Use Case
 - *Cases typically have a set of things that need to be done to successfully move a case to completion*
 - *Some of these things can be as simple as “check that a specific document is included”*
 - *These “to-do” items require no workflow behind them*
 - *They simply need to be easily visible and available when viewing the case*
 - *You do want to be able to control when certain to-dos are visible or required*
 - *You also want to track in the case’s history when a to-do was completed and by whom*
- Specific Use Case
 - *When an incident case type specifies that the incident type was an accident, a set of extra data is required to capture things like “Was there a witness?”, “Was the accident site visited?”, etc*

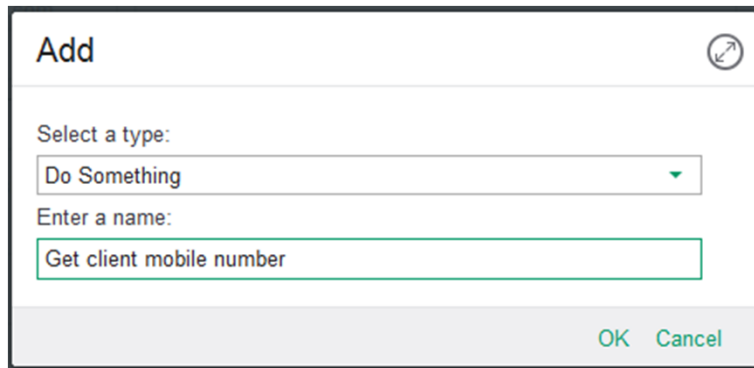
To-do Tasks - Design

- Created like any other task type
- Supports automatic and discretionary modes
- Uses task properties to store any optional data captured as part of the to-do task
- Does not have underlying workflow

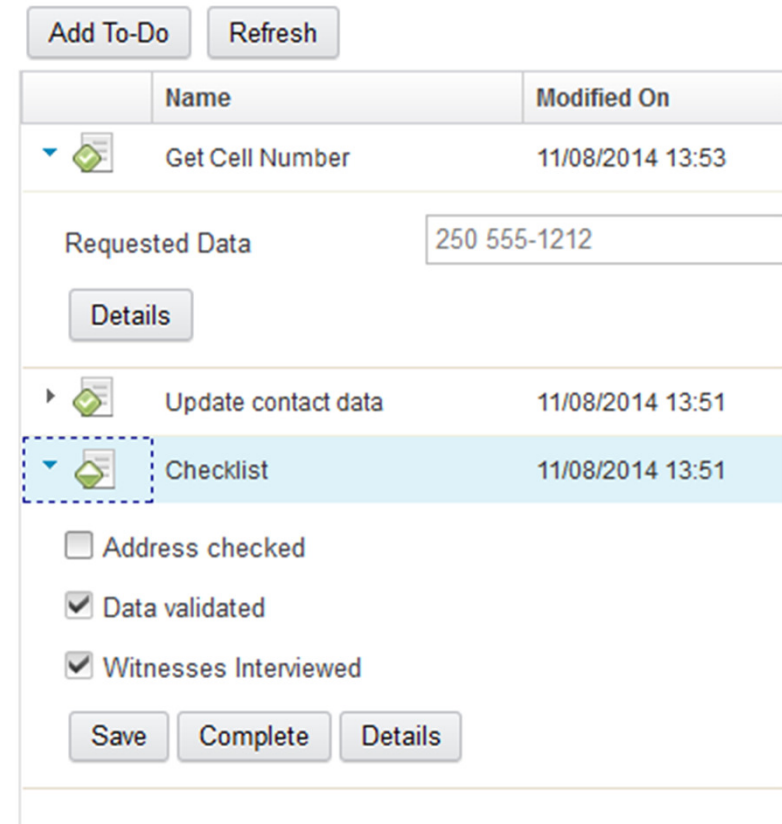


To-do Tasks - Runtime

- To-do tasks are displayed in their own To-do widget
- Customizable actions allow saving, completing, disabling, and enabling To-do items
- Case workers can add To-do items on the fly



The 'Add' dialog box is shown with a title bar and a close button. It contains two input fields: 'Select a type:' with a dropdown menu showing 'Do Something', and 'Enter a name:' with a text box containing 'Get client mobile number'. At the bottom, there are 'OK' and 'Cancel' buttons.



The screenshot shows a 'To-do' widget with 'Add To-Do' and 'Refresh' buttons. Below is a table of tasks:

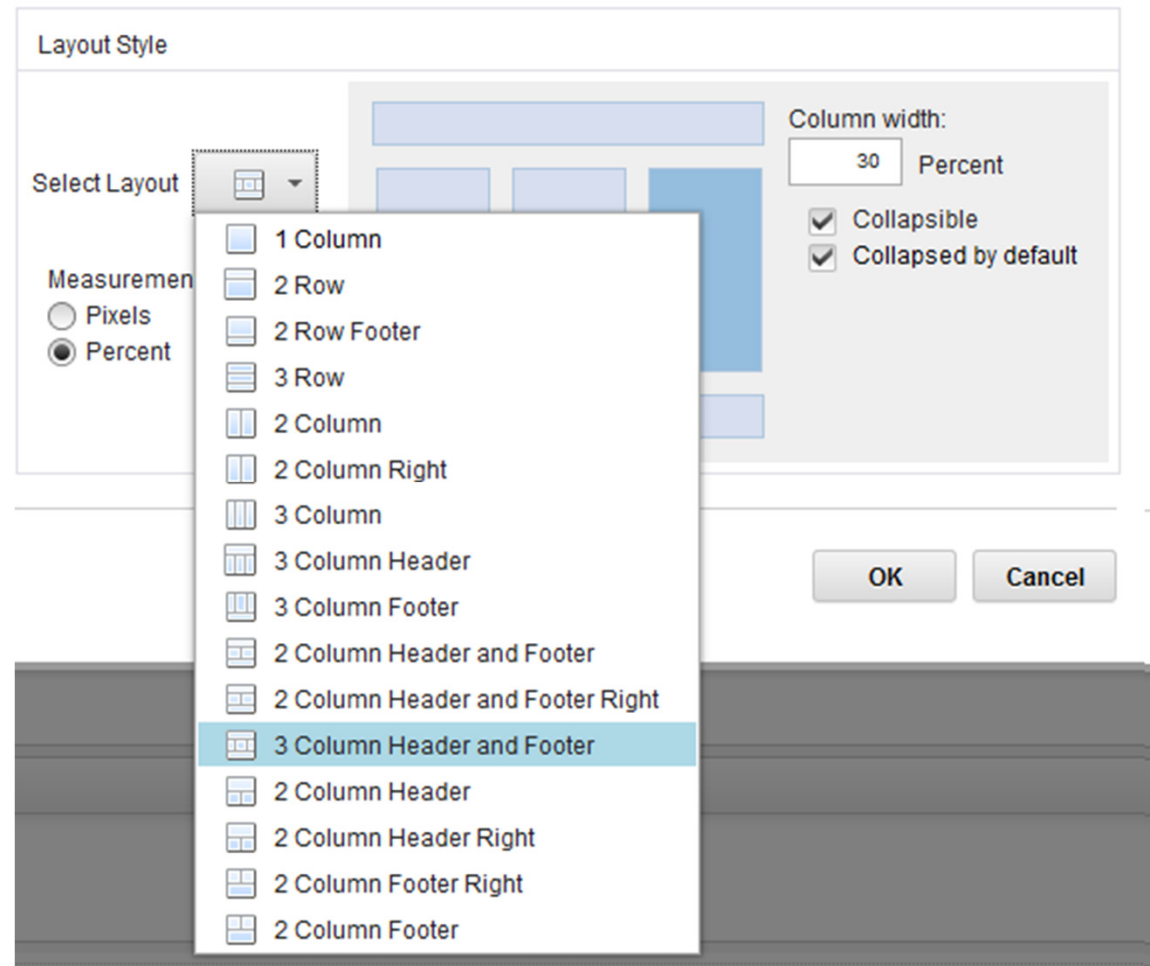
	Name	Modified On
▼	Get Cell Number	11/08/2014 13:53
Requested Data		250 555-1212
Details		
▶	Update contact data	11/08/2014 13:51
▼	Checklist	11/08/2014 13:51
<input type="checkbox"/> Address checked		
<input checked="" type="checkbox"/> Data validated		
<input checked="" type="checkbox"/> Witnesses Interviewed		
Save Complete Details		

Additional Page Layout Configurations

- General Use Case
 - *For solutions that require UIs with many out-of-the-box or custom widgets, flexible page layouts are key to ensuring case data is presented in an efficient, intuitive way*
- Specific Use Case
 - *Create a two column layout for the work page with the In-basket on the left and a collapsible Case Information widget on the right*

Additional Page Layout Configurations

- Provides eight additional layout combinations
- Supports collapsible left/right columns, headers and footers
- Collapsible columns can be shown/hidden with a simple wiring event



New APIs for Creating Custom Data Editors

- General Use Case
 - *The ICM user interface includes several standard controls for entering case data of various data types*
 - *Some solutions may require various specific controls that help users enter the correct values*
- Specific Use Case
 - *A case solution has a boolean property that can be used to enter values like “Yes/No”, “True/False”, checked / unchecked*
 - *These values can often contain a third state; that being “I have not answered this yet”*
 - *A more explicit control is needed to clearly indicate this potentially ambiguous state*

New APIs for Creating Custom Data Editors

- Custom property editors can be created as Navigator plug-ins
- They provide not only custom UI for a property, but optional configuration settings for that UI
- They are registered into ICM using a CMAC task
- Once registered, they appear as additional choices for a property editor

Custom editor displayed in view designer

The screenshot shows a form in a view designer. The 'Location Visited' property is highlighted with a blue border, indicating the custom editor is active. Other visible fields include 'Incident Category', 'Case Stage', and 'Similar Notifications'.

The screenshot shows the configuration settings for the custom editor. The 'Editor' dropdown is set to 'Custom Yes No Check Box Editor'. Other settings include 'Read-only', 'Required', 'Hidden', and 'Default Value'.

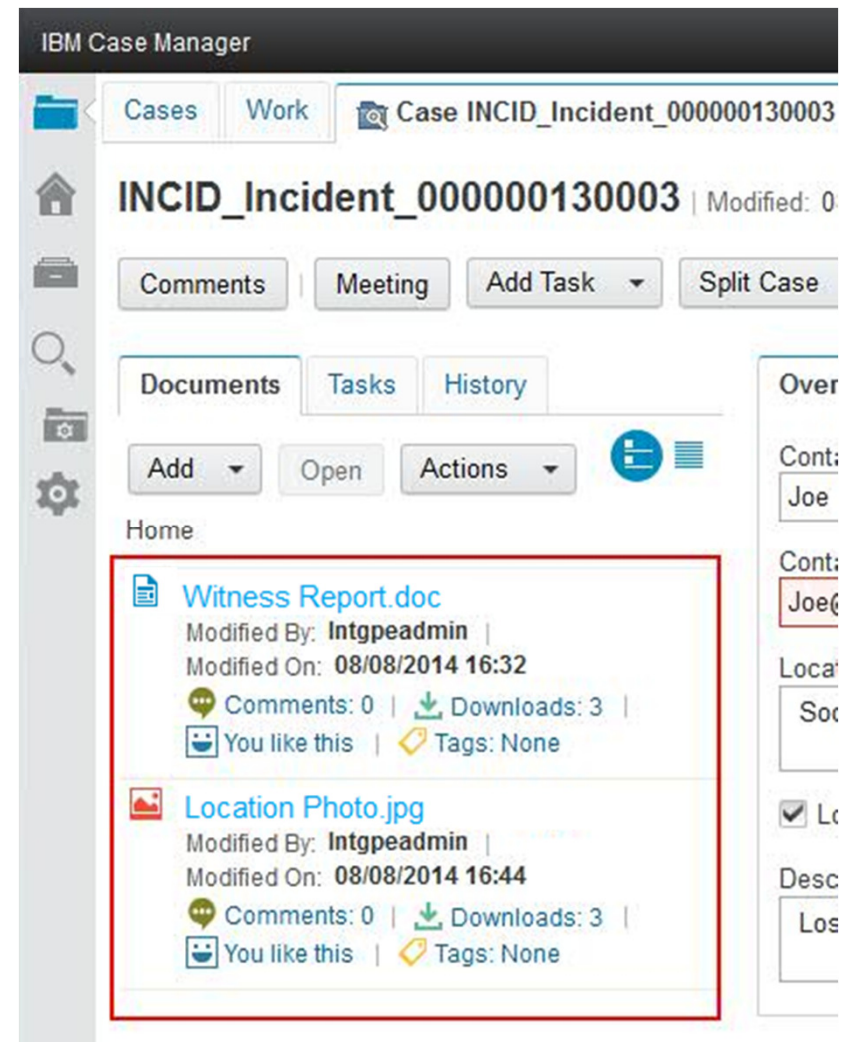
Custom editors are registered once and available for any solution

Social Information for Case Documents

- General Use Case
 - *When collaborating on a case with a team of knowledge workers, it is often helpful to know when case documents have been downloaded or liked*
 - *Tagging provides a quick way of categorizing related documents; making them easier to find later*
- Specific Use Case
 - *A case worker has added a set of documents to a case folder*
 - *Over the next several days, the worker is able to see who downloaded the documents, who liked the content, and tag it with keywords that can help other users of the content locate it quickly*

Social Information for Case Documents

- Social information like comments, tags, likes and download counts are maintained natively in an object store by the Content Platform Engine.
- This information is optionally displayed directly in the document magazine view or in a document's property page



Zero Download Viewer Support

- General Use Case

- *Viewing a document that resides in a content repository used to require an initial acceptance and download of a large viewer java applet*
- *Although feature rich, the viewer applet may not be required by all users*
- *The viewer applet may also not be supported on all user devices*

- Specific Use Case

- *A case folder has a spreadsheet document filed in it that a user needs to review quickly*
- *When they click the document, it is rendered on the server and quickly delivered to the case's Viewer widget*
- *No long applet downloads or startup is required to view the spreadsheet*

Zero Download Viewer Support

- ICM Viewer page widget now supports the new Navigator zero download document viewer
- Documents that are part of a case can be viewed directly on the page without requiring a download of the viewer applet
- Documents of many formats are rendered quickly on the server and delivered for viewing to the client

Office document
rendered on server
and displayed in
the ICM Viewer
widget



Add Case Documents With Entry Templates

- General Use Case
 - *Adding documents into a content repository can often be time consuming and confusing if doc class, doc properties, and security is required*
 - *A user must also know to select the correct document class in the first place*
- Specific Use Case
 - *A user is adding an incident report document into their case*
 - *The solution has a document class defined for that type of document that includes several pieces of meta data that need to be entered by the end users*
 - *An Entry Template is created that uses the case's incident report doc class*
 - *It also sets default security and predefines any default meta data values*
 - *An ICM toolbar button or menu named "Add Incident Report" is added to the case details page using ICM's new Entry Template action*
 - *The user is now taken directly into the correct Entry Template, reducing clicks and the chance of error*

Add Case Documents With Entry Templates

- Navigator 2.0.3 has a new Entry Template design feature
- In ICM, a new menu action allows you to invoke the Entry Template and also have the resulting document filed in the case

The screenshot displays the 'Entry Template Manager' interface on the left and the 'Case Information' dialog on the right.

Entry Template Manager: This panel shows a list of templates. The 'New Entry Template' button is highlighted with a red circle. Below it, a dropdown menu is open, showing 'Document Entry Template' and 'Folder Entry Template'. The list includes templates like 'VSID_ICN Demo ET', 'WPET with no ET at checkin', and 'WP_NoET_at_checkin', each with details for Description, Class Name (BVT_Doc1), and Template Type (document).

Case Information Dialog: This dialog has tabs for 'Settings', 'Menus', and 'Toolbars'. The 'Toolbars' tab is active. It shows a 'Toolbar for:' dropdown set to 'Documents view'. Below this is a toolbar with various icons. The 'Action:' dropdown is set to 'Import Document using Entry Template'. The 'Alignment:' dropdown is set to 'Left'. The 'Label:' field contains 'VSID_AddFromLocalUsingTemplate'. At the bottom, there is a text field for 'Specify the Id of an entry template to be used for adding new document:' with the value '{BABB0E4A-EE0D-4F9B-A29F-D5FC9BADA53E}'. 'OK' and 'Cancel' buttons are at the bottom.

File Tracking, Favorites and Desktop Sync

- General Use Case
 - *Working with documents that reside in a content repository often requires extra user actions*
 - *Users would like to streamline the number of clicks needed, while still benefiting from an ECM environment*
- Specific Use Case
 - *A user checks out and downloads a document from a case that they are going to edit on their local machine*
 - *The system remembers where they like to keep their downloaded files*
 - *When the user checks the file back in, the system remembers where the document was downloaded and does not make you search for it*
 - *When a user is actively working on a set of favorite files, the system can keep the online and offline files automatically synchronized so the latest version is always available in both places*

File Tracking, Favorites and Desktop Sync

- File Tracking and desktop synchronization are part of the new Content Navigator 2.0.3 release and available to Case Manager which is built on the Navigator framework
- There is a new ICM menu action that allows you to identify case documents, folders, and from the Case List, the entire case folder itself as Favorites
- Once in the Navigator favorites, the user can configure synchronization

