



Product Implementation Training (PIT)

IBM Case Manager 5.2.1

Using external documents in a case and as attachments

Course Roadmap



- ➔ External Documents Overview
 - Configuring and using external repositories
 - Enabling external repositories using Case Builder
- Adding external documents to a Case
- Working with external documents in a Case
- Using external documents as Attachments
- Known issues and trouble shooting guidelines
- Course Summary

External Documents: Overview

- What is an external document?
 - An external document is an artifact that resides in an external repository.
 - An external repository is an IBM Content Navigator repository that is different from the current Target Object Store.
- Supported repository types
 - *IBM FileNet P8 (same domain such as DOS and cross-domain)*
 - *IBM Content Manager V8.4.3 and V8.5 (CM8)*
 - *IBM Content Manager OnDemand V9.0*
 - *CMIS based repositories configurable via IBM Content Navigator*
 - *Alfresco*
 - *SharePoint*
 - *FN-CMIS etc*

External Documents: Overview

- Case Manager 5.2 and below only supported documents from a single repository.
 - In ICM on P8 environments, a case could only contain documents and folders from the current TOS.
 - When enabled for CM8 integration, Case Manager supported documents from a single CM8 repository.
- Case Manager 5.2.1 now supports using documents from multiple external repositories.
 - External documents can be added to a case or as attachments to a work item
 - All documents will continue to reside in the external repository
 - Proxy document references are created in TOS and filed into the case
 - Attachments will contain a reference to the original document ID

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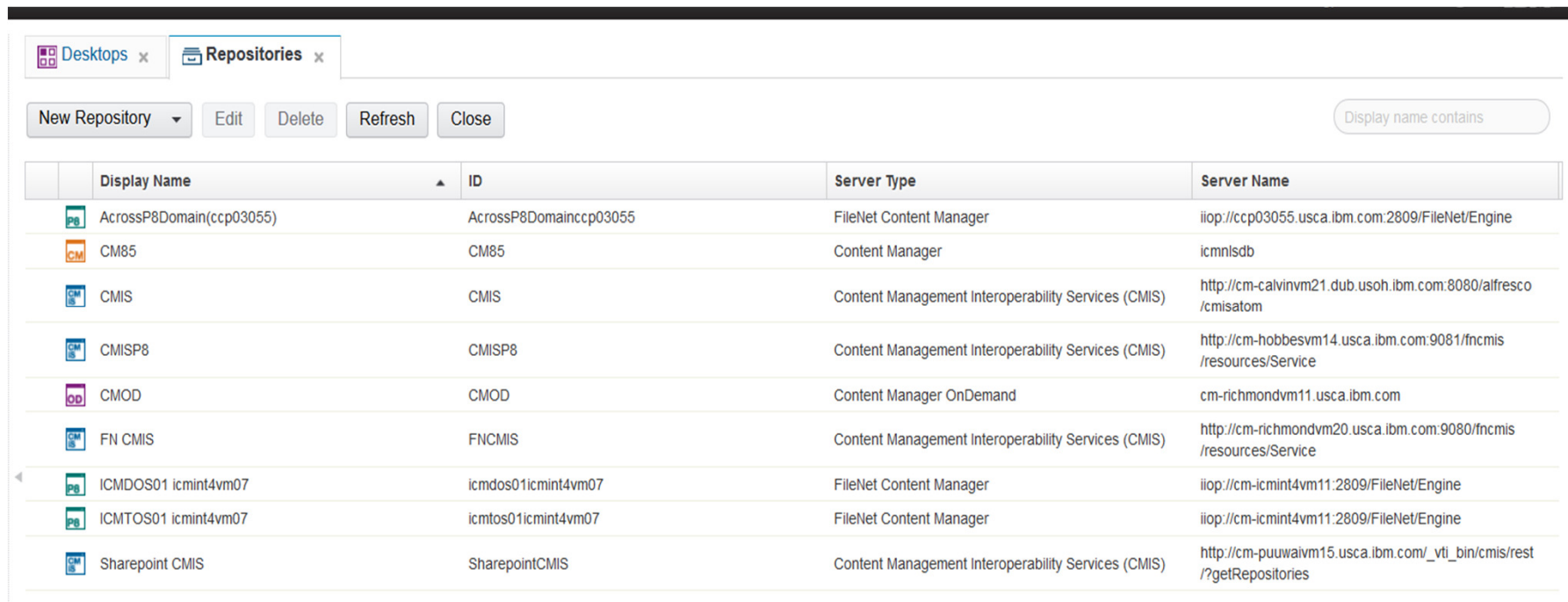
Configuring and using external repositories










■ IBM Content Navigator Configuration

- All external repositories must be configured via IBM Content Navigator's Administration desktop.
 - <http://<host>:<port>/navigator/?desktop=admin>
- After the external repositories are configured, they must be added to the “Case Manager” desktop or “icm” desktop.

Configuring and using external repositories

Configure external repositories via IBM Content Navigator's Administration desktop.



	Display Name	ID	Server Type	Server Name
	AcrossP8Domain(ccp03055)	AcrossP8Domainccp03055	FileNet Content Manager	iiop://ccp03055.usca.ibm.com:2809/FileNet/Engine
	CM85	CM85	Content Manager	icmnlbdb
	CMIS	CMIS	Content Management Interoperability Services (CMIS)	http://cm-calvinvm21.dub.usoh.ibm.com:8080/alfresco/cmisatom
	CMISP8	CMISP8	Content Management Interoperability Services (CMIS)	http://cm-hobbesvm14.usca.ibm.com:9081/fncmis/resources/Service
	CMOD	CMOD	Content Manager OnDemand	cm-richmondvm11.usca.ibm.com
	FN CMIS	FNCMIS	Content Management Interoperability Services (CMIS)	http://cm-richmondvm20.usca.ibm.com:9080/fncmis/resources/Service
	ICMDOS01 icmint4vm07	icmdos01icmint4vm07	FileNet Content Manager	iiop://cm-icmint4vm11:2809/FileNet/Engine
	ICMTOS01 icmint4vm07	icmtos01icmint4vm07	FileNet Content Manager	iiop://cm-icmint4vm11:2809/FileNet/Engine
	Sharepoint CMIS	SharepointCMIS	Content Management Interoperability Services (CMIS)	http://cm-puuwaivm15.usca.ibm.com/_vti_bin/cmris/rest/?getRepositories

Configuring and using external repositories

Add external repositories to the “Case Manager” desktop or “icm” desktop

Save and CloseSaveResetClose

Desktop: **Case Manager**

• General

• **Repositories**

• Layout

Appearance

• Menus

Workflows

Mobile

Specify which repositories you want users to have access to from this desktop. You must configure your repositories before you can add them to the desktop.

Tip: You can limit which repositories are available for each feature when you configure the desktop layout.

Filter

Available Repositories

➔

⬅

Selected Repositories

ICMTOS01 icmint4vm07

ICMDOS01 icmint4vm07

AcrossP8Domain(ccp03055)

CM85

CMIS

CMISP8

CMOD

FN CMIS

Sharepoint CMIS

Configuring and using external repositories

- Run one of the following tasks
 - IBM Case Manager Configuration Tool
 - Configure Case Management Object Stores task
 - OR Case Manager Administration Client
 - Update Object Stores task.
- These tasks will create a database table in the Case Manager Target Object Store to store the proxy documents in P8
- Details will be covered in PxT for Upgrade

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Case Builder: Enabling external repository support

- Enable Case Types to support external documents
- Do not use the original Document Title (unchecked by default)

Manage Solutions \ External Doc... \ External Doc...

Case Type

Properties

Views

Case Folders

Rules

Tasks

Case Type Attributes

* Case type name:
External Docs case

* Case type unique identifier:
ED2_ ExternalDocscase

Case type description:
Case supports external docs with default case details and work details

Starting document type:
<None>

External repository:

☒ Allow documents and attachments from repositories other than the case management object stores

☐ Display system-generated titles initially instead of the original document titles

☐ Enable case workers to create custom tasks

Default layout for Add Case page:
Add Case

Upper check box will affect dialogs used to add documents from repository and local system.

Once enabled user can select external repository to get document from or to save in.

Everything but TOS where case folder is found is external.

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Adding external documents to a Case

- External documents can be added to a case by
 - Selecting one or more existing documents from an external repository and filing them into the case
 - Uploading a document from the case worker's local file system to an external repository that supports Add Document and filing the newly added document into a case
- A proxy document with the following information is created in P8 for each selected external document that is filed into the case folder
 - Document ID of the external document
 - Document title (only if the "Display system generated title" checkbox has not been checked in Case Builder)
 - Server connection information to access the document

Adding external documents to a Case

- Selecting documents from external repositories
 - New searches can be defined for P8, CM8 and CMIS repositories
 - CMOD only supports cross repository searches pre-defined using IBM Content Navigator Search builder.

▼ Search Criteria

How do you want to find items to attach:

☒ New search
☐ Existing search

Search in: ICMTOS01 icmint4vm07 (Including subfol... Search options: Documents, Released version

Class:

Document Title

Add Property

Search Res

▼ Search Results

Search in:

Repository

ICMTOS01 icmint4vm07

AcrossP8Domain(ccp03055)

CM85

CMIS

CMISP8

FN CMIS

ICMDOS01 icmint4vm07

ICMTOS01 icmint4vm07

Sharepoint CMIS

► TranslationTest

► testcode

☒ Include subfolders OK Cancel

Adding external documents to a Case

- Selecting documents from external repositories
 - Only existing cross-repository searches pre-defined using IBM Content Navigator can be used to search CMOD repositories.

▼ Search Criteria

How do you want to find items to attach:

☐ New search

☒ Existing search

Repository: ICMTOS01 icmint4vm07 ▼

- ICMTOS01 icmint4vm07
- ICMDOS01 icmint4vm07
- AcrossP8Domain(ccp03055)
- CM85
- CMIS
- CMISP8
- CMOD**
- FN CMIS
- Sharepoint CMIS

► Search Results

Adding external documents to a Case

- Uploading a document from a local file system to an external repository
 - Save in field is now displayed in the Add document dialog
 - List of repositories displayed are P8, CM8 and CMIS
 - CMOD does **not** support document ingestion via this dialog. Documents are ingested into CMOD via bulk loading or using the command line data loading and indexing tool ARSLOAD.

The screenshot shows a web interface with two sections: 'General' and 'Properties'. In the 'General' section, the 'Save in:' field is highlighted with a red box. Below it, the text 'What do you want to save?' is displayed. In the 'Properties' section, the 'Class:' dropdown is set to 'Document'. A 'Document Title:' field is also visible. Overlaid on this is a 'Save in:' dialog box. This dialog has a 'Repository' dropdown menu, which is also highlighted with a red box. The dropdown list shows several options: 'ICMTOS01 icmint4vm07' (selected), 'AcrossP8Domain(ccp03055)', 'CM85', 'CMIS', 'CMISP8', 'FN CMIS', 'ICMDOS01 icmint4vm07', 'ICMTOS01 icmint4vm07', and 'Sharepoint CMIS'. Below the list are two folder icons labeled 'TranslationTest' and 'testcode'. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

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Working with external documents in a Case



- External documents are displayed in the “Documents” tab of the Case Information widget along with other P8 documents.
- On initial rendering and on refresh operations, the document is represented with a generic mime type icon identifying it is external.
- On selecting the row corresponding to the external document, the [actual document information and content](#) are retrieved and updated in the Documents list. This includes:
 - Updated mime type
 - Updated locked status
 - Updated information
- Note: On selecting the row, the case worker is prompted to login to the external repository if the external server is not configured for Single Sign-on. And the row is updated only if the logged in user has the right privileges to access the document. All privilege checks are made against that repository.

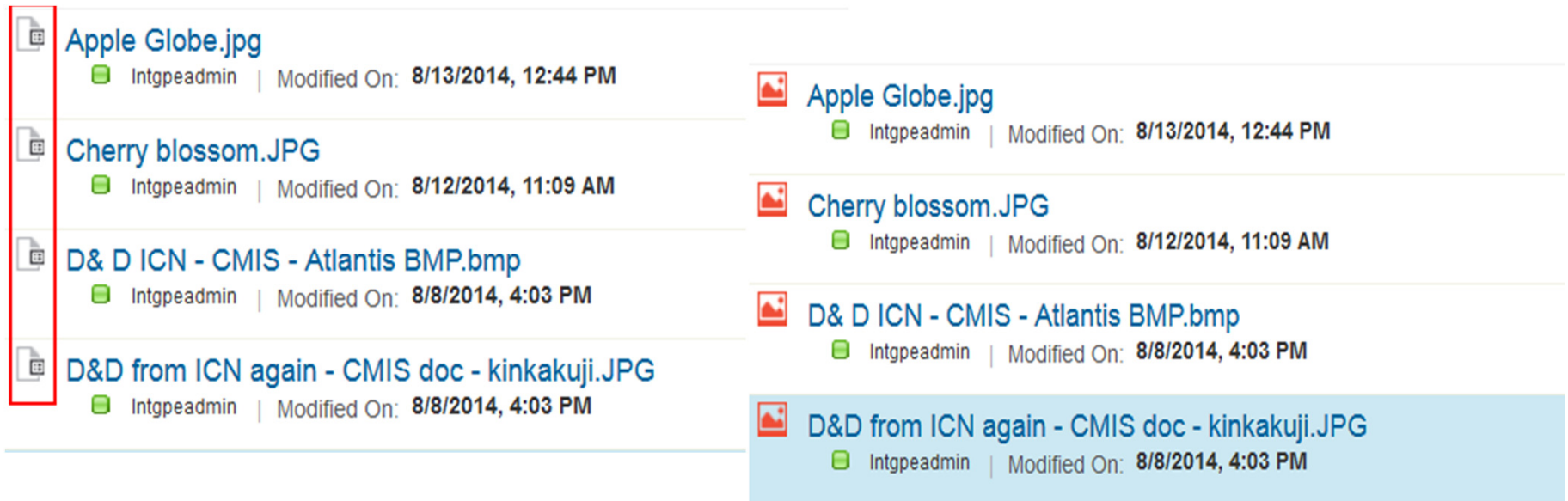
Working with external documents in a Case

- After the document is retrieved and the row is updated, the context menu for the actual document gets enabled.
- The context menu actions that display are based on the selected document and its repository type
 - E.g. A document from a CMOD repository will not cause the Check in/Check out and versioning related actions to be enabled
- Some actions are followed by a refresh on the current folder. The refresh operation resets the external document state to that of the proxy.

Working with external documents in a Case

External documents are displayed with generic mime type icon (on the left)

More details added after selecting the row



The screenshot displays a list of four external documents. The left side shows the initial state where all rows have a generic document icon. The right side shows the state after selecting the last row, 'D&D from ICN again - CMIS doc - kinkakuji.JPG', which is highlighted in blue and now features a red image icon. Each entry includes the filename, the user 'Intgpeadmin', and the modification date and time.

Document Name	User	Modified On
Apple Globe.jpg	Intgpeadmin	8/13/2014, 12:44 PM
Cherry blossom.JPG	Intgpeadmin	8/12/2014, 11:09 AM
D& D ICN - CMIS - Atlantis BMP.bmp	Intgpeadmin	8/8/2014, 4:03 PM
D&D from ICN again - CMIS doc - kinkakuji.JPG	Intgpeadmin	8/8/2014, 4:03 PM

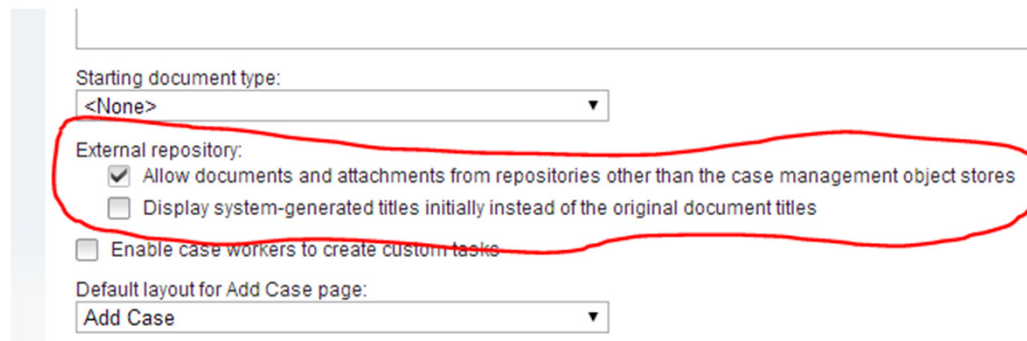
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Using external documents as Attachments

- Use the Attachment widget to attach documents from external repositories to a work item
- Attachment widget functionality reflects the configuration applied to the case type in Case Builder



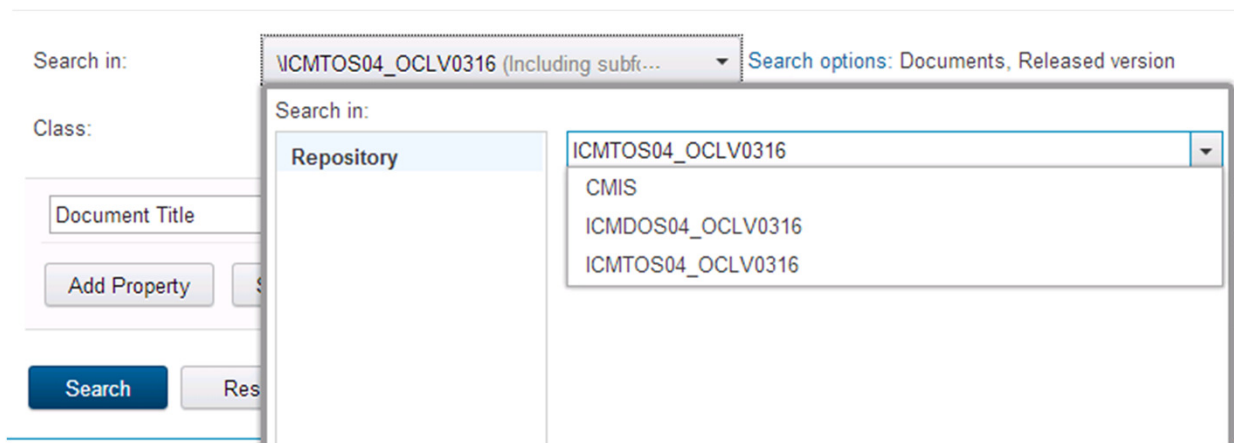
The screenshot shows a configuration panel for the Attachment widget. The 'External repository' section is highlighted with a red circle. It contains the following settings:

- Starting document type: <None>
- External repository:
 - ☒ Allow documents and attachments from repositories other than the case management object stores
 - ☐ Display system-generated titles initially instead of the original document titles
 - ☐ Enable case workers to create custom tasks
- Default layout for Add Case page: Add Case

- Users can attach documents directly from the external repository
- Alternatively attach documents from the local system and save them in the external repository (with exception of CMOD)


Using external documents as Attachments

- When support for external documents is enabled users can select an external repository, CMIS in screenshot below. There will be a prompt to provide CMIS (or other external repository) credentials



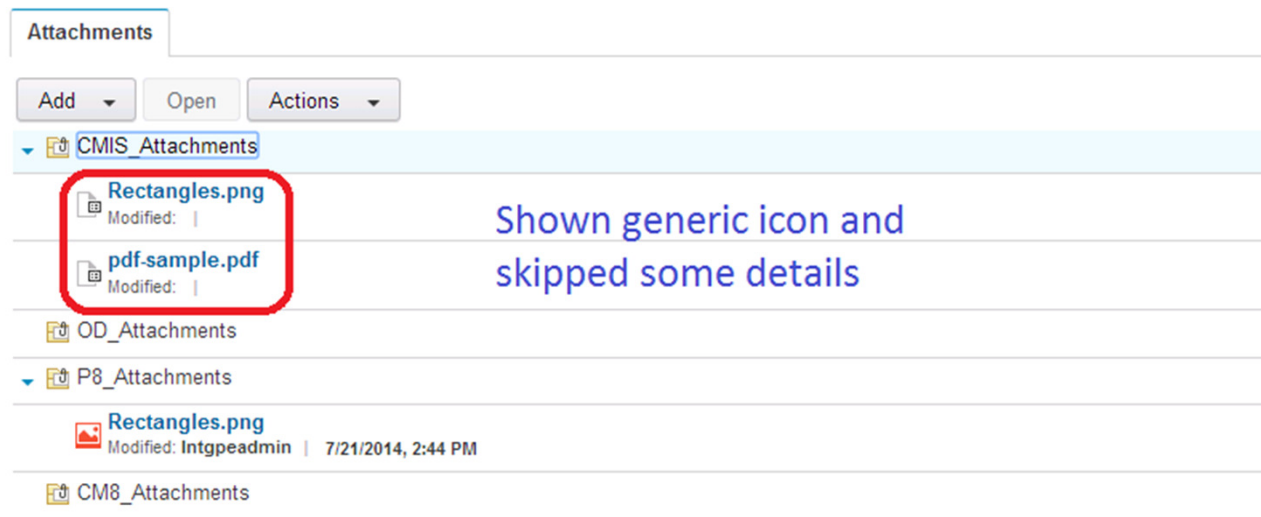
- Once external repository is selected steps to attach a document are the same as they would be for a repository that hosts case management object stores

Using external documents as Attachments

- 
- **Unlike in the scenario when handling external case documents we don't create a proxy that is saved in case folder. Attachment always references real document**
 - There are still differences in handling external and "internal" attachments in the Attachment widget UI. These are explained in next slide
 - When user opens Work Detail page the Attachment widget may have to render UI to represent mix of documents, some from local repository and others from external ones which results in their different initial representation and allowed actions

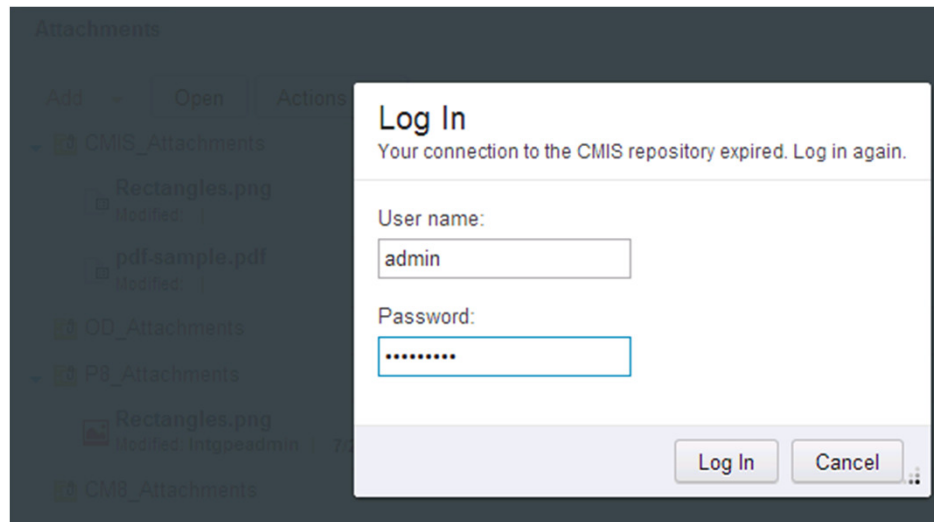
Using external documents as Attachments

- When rendering the page the user is not prompted to enter credentials and log in to retrieve attachments from any external repositories
- For this reason the resulting UI is incomplete like in the scenario related to case documents even though attachments don't use proxies



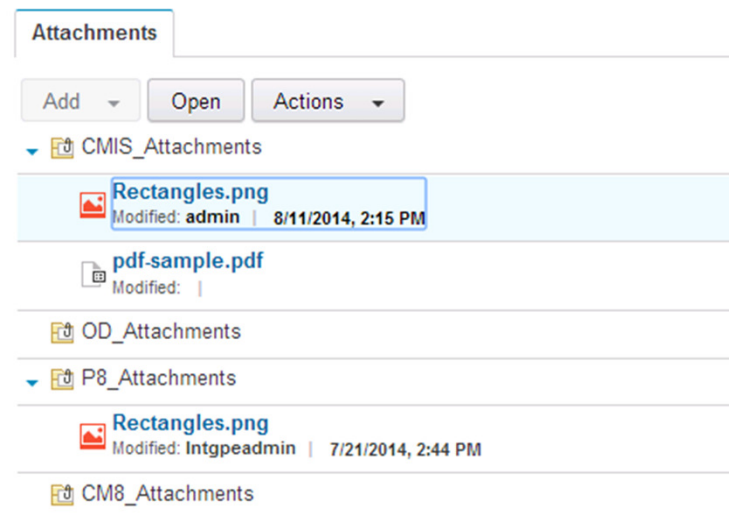
Using external documents as Attachments

- When the user clicks on the attachment, if it is from an external repository, a Content Navigator log in dialog pops up



Using external documents as Attachments

- After successful log in, all the attributes of the external attachment is retrieved and UI is updated



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Known issues and trouble shooting guidelines

- If an external document is deleted in its original repository after being added to a case, the document cannot be unfiled/removed from Case using the Case Client. In such cases, the proxy document will continue to show up until it is deleted from the TOS using tools such as FileNet Enterprise Manager (FEM).
- Documents from Alfresco CMIS repositories do not support Cancel Checkout operation from Case Client.
- If you run into issues and cannot work with an external document in a case folder, validate that IBM Content Navigator is able to connect to the repository and find the document.
- User will have to make extra click on external attachment to enable all supported actions in context menu.

Course Summary



You have completed this course and can:

- Understand how to work with documents from external repositories and add them to a case or as an attachment to a work item.

Contacts

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- Support: Ted Dullanty (tdullanty@us.ibm.com)

Product Help/Documentation/Resources



- IBM Case Manager 5.2.1 Knowledge Center: http://www-01.ibm.com/support/knowledgecenter/SSCTJ4_5.2.1/com.ibm.casemgmtoc.doc/casemanager_5.2.1.htm
- IBM Content Navigator 2.0.3 Knowledge Center: http://www-01.ibm.com/support/knowledgecenter/SSEUEX_2.0.3/contentnavigator_2.0.3.htm
- IBM FileNet P8 5.2 Knowledge Center: http://www-01.ibm.com/support/knowledgecenter/SSNW2F_5.2.0/com.ibm.p8toc.doc/filenetcontentmanager_5.2.0.htm?lang=en
- IBM Support: Fix Central <http://www-933.ibm.com/support/fixcentral/>