- Gai Li
- Using Page Designer to Customize Case Client layout
- 2013.9.11

Product Maintenance Training (PMT)

IBM Case Manager 5.2

Using Page Designer to customize Case Client layout

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Introduction

- **Course Overview**
  - Using Page Designer to customize Case Client layout in Case Builder

- **Target Audience:**
  - Solution designer

- **Suggested Prerequisites:**
  - Familiar with Case Builder

- **Version Release Date: September, 2013**

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Course Objectives

After this course you will be able to:

- Learn how pages are classified in ICM5.2.

- Learn how to design page.

- Learn how to customize widget settings.

- Learn how to customize widget toolbars and menus.

- Learn how to wiring widgets and page.

- Learn how to integrate custom widget.

- Learn how to localization custom input string.

Course Roadmap

➔ Page Management in Case Builder

– Page Designer Overview

– Page Function Features

– Configuration settings for OOTB widgets

– Custom widgets and widgets' properties definition

– Localization of page/widget custom input strings

Page Management in Case Builder

- The default pages in Case Builder:

  - Solution Pages

    Work,   Cases

  - Case Details Pages

    Case Details,   Case Details Form

  - Add Case Pages

    Add Case,   Add Case Form
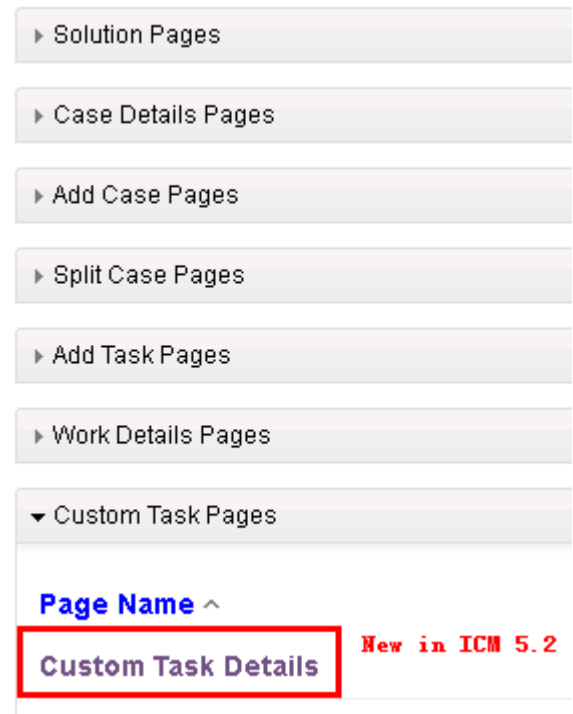
  - Split Case Pages

    Split Case

  - Add Task Pages

    Add Task,   Add Task Form

  - Work Details Pages

    Work Details, Work Details Form,   Form Attachment Work Details,

  - Custom Task Pages

    Custom Task Details

▶ Solution Pages

▶ Case Details Pages

▶ Add Case Pages

▶ Split Case Pages

▶ Add Task Pages

▶ Work Details Pages

▼ Custom Task Pages

Page Name ^

Custom Task Details   New in ICM 5.2

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Page Management in Case Builder
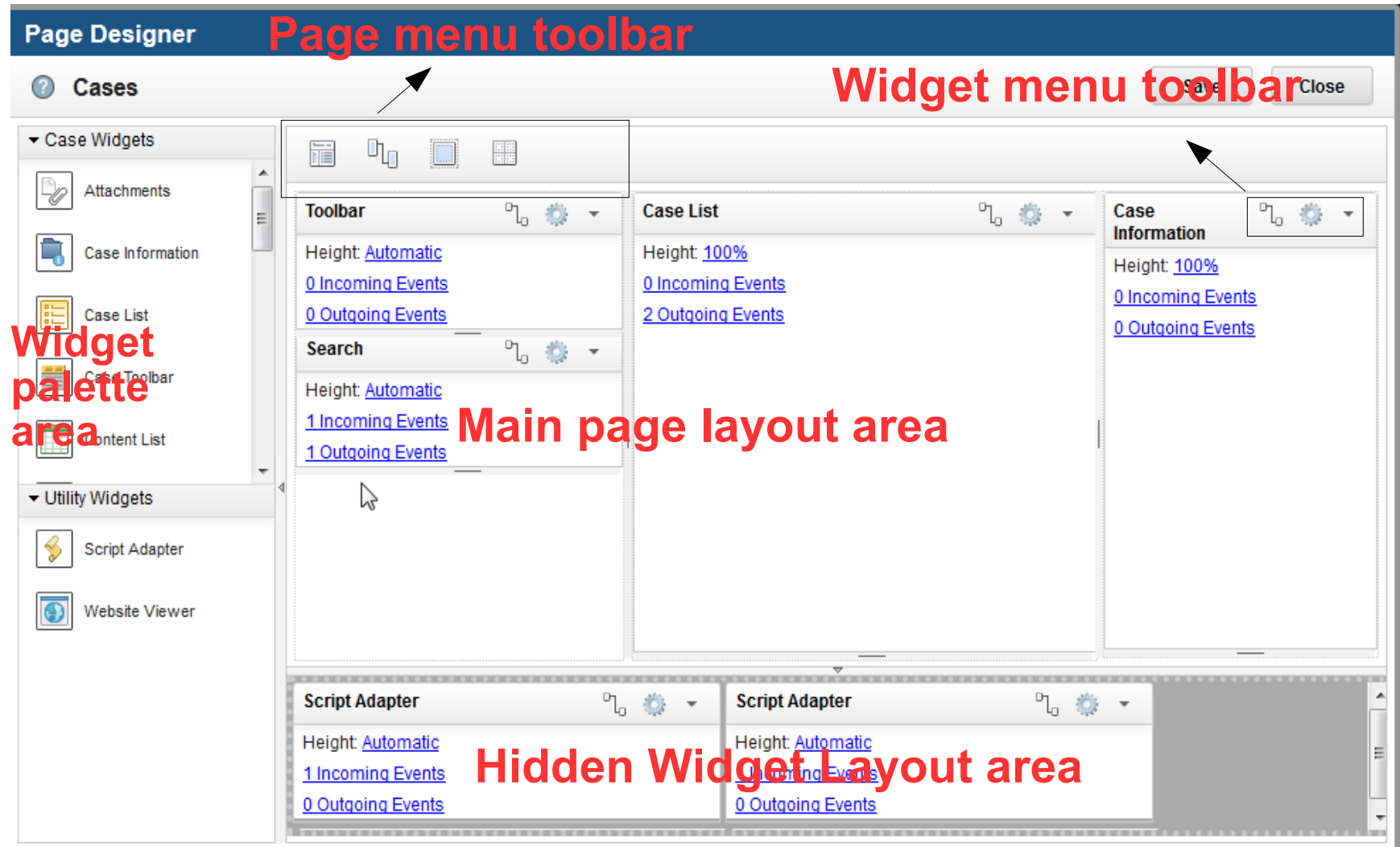
Page Management in Case Builder

Course Roadmap

– Page Management in Case Builder

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Page Designer Overview

- New page designer tool in Case Builder to design the page
  - Page UI design
    - Page layout design
      - 8 layout type provided in ICM 5.2
      - Layout region design (width in pixel or percentage, collapsible)
    - Page title/Page border
    - Page level event wiring
  - Widget design and configuration
    - Widget position and style
    - Widget properties configuration
    - Event wiring and configuration

Page Designer Overview

Course Roadmap

- Page Management in Case Builder

- Page Designer Overview

➜ Page Function Features

- Configuration settings for OOTB widgets

- Toolbar and menu customization

- Extension points for widgets and actions

Page Function Feature – Page layout options

- Page title
- Page layout: 8 layout types can be used to design a page.
  - Region width
  - Region collapsible setting

Page options

Page Options

Change the width of the columns in the page and indicate whether each column is collapsed by default.

Page Title

a

Layout Style

Select Layout

Measuremen
- Pixels
- Percent

1 Column
2 Row
2 Column
3 Column
3 Column Header
2 Column Header/Footer
2 Column Header
2 Column Footer

Column width:
33 Percent
Collapsible
Collapsed by default

OK   Cancel

Page Function Feature – Other Page Functions

- Page event wiring/Broadcast event management
- Hidden widget Management
- Page border setting

Hidden widget

Page event management

Page border setting

Wire Events

Widget [Page Container ▼]

Event Wiring | Event Broadcasting

Add wires to establish communication between widgets. A

Incoming Events for the Page Container

Drag and drop widgets into this area.

Course Roadmap

- – Page Management in Case Builder
- – Page Designer Overview
- – Page Function Features
- ➔ Configuration settings for OOTB widgets
- – Custom widgets and widgets' properties definition
- – Localization of page/widget custom input strings

Configuration settings for OOTB widgets

- Page widgets list under different categories.
- The OOTB Widgets:
  - Case Widgets:

Attachments,	Case Information,
Case List,	Case Toolbar,
Content List,	Form,
In-baskets,	**Instruction**,
Original Case,	Process History
Properties,	Search,
Select Case Documents,	Split Case,
Timeline Visualizer,	Toolbar,
Viewer,	Work Item Toolbar

  - Utility Widgets:

Script Adapter,	Website Viewer

Case Widgets

- Attachments
- Case Information
- Case List
- Case Toolbar
- Content List
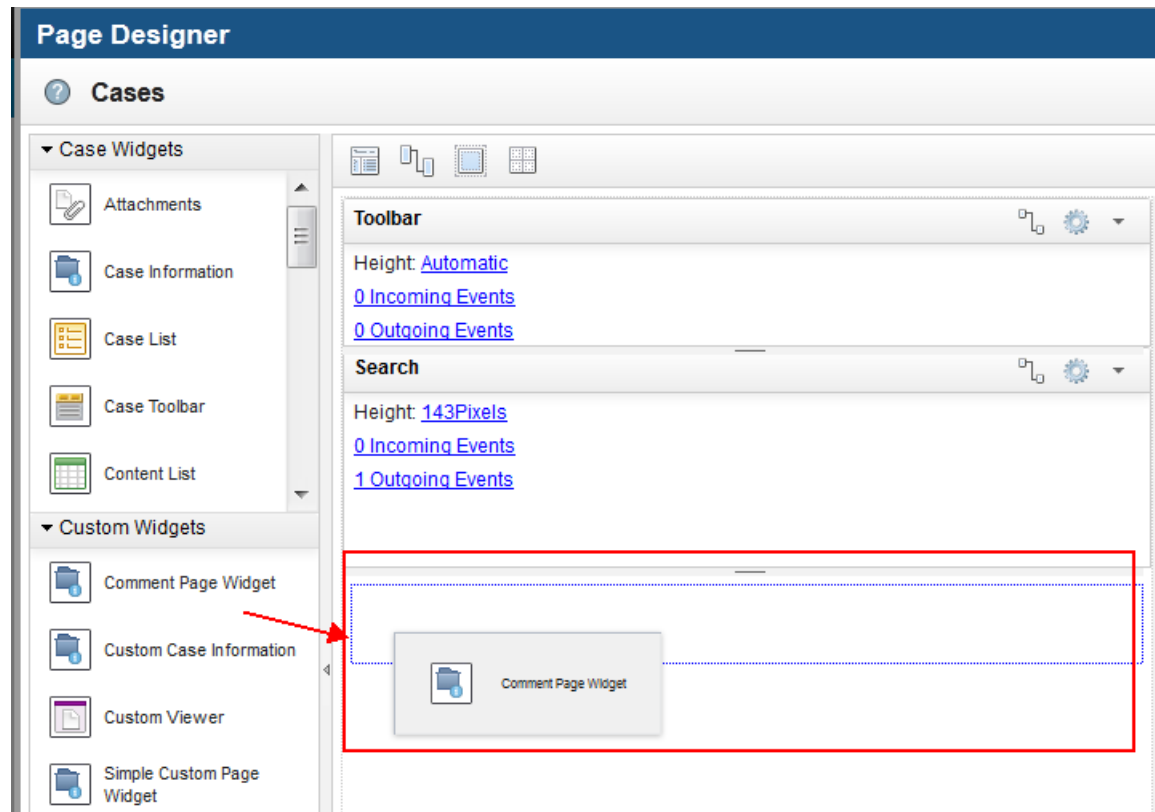- Form
- In-baskets
- Instruction

Utility Widgets

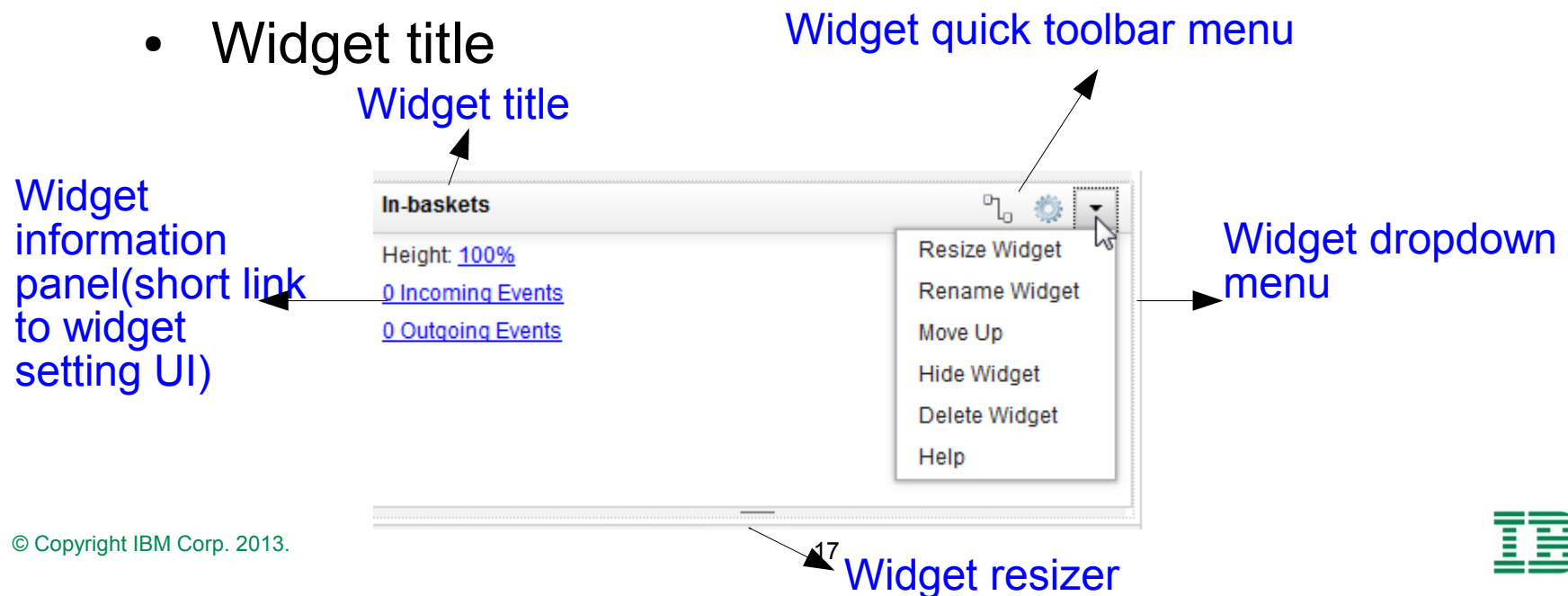- Script Adapter
- Website Viewer

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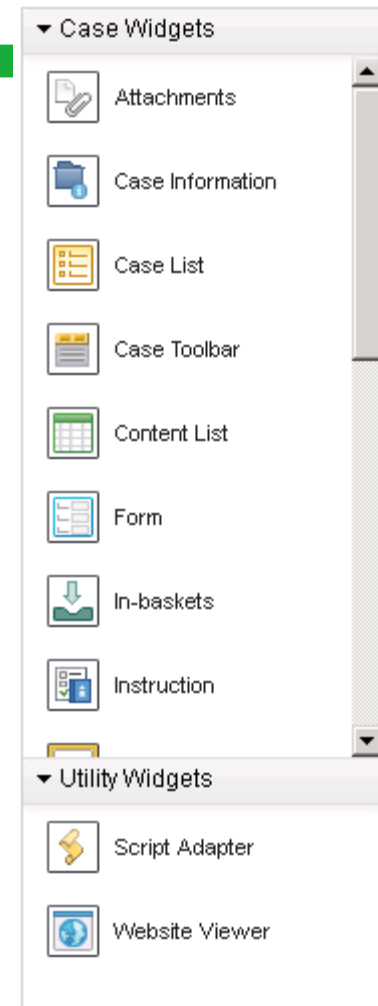
Configuration settings for OOTB widgets

- Widgets can re-arranged on the screen by dragging and dropping from the widget palette into page layout.

Configuration settings for OOTB widgets

- A widget object put in page layout is editable for:
  - Configure the widget properties
  - Wiring event between widgets or between widgets and page
  - Broadcast event disable/enable
  - Widget style
    - Height
    - Widget title

Widget quick toolbar menu

Widget title

Widget information panel(short link to widget setting UI)

In-baskets

Height: 100%

0 Incoming Events

0 Outgoing Events

Resize Widget
Rename Widget
Move Up
Hide Widget
Delete Widget
Help

Widget dropdown menu

Widget resizer

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Configuration settings for OOTB widgets

- Widget height can be resized specifically by mouse cursor in pixel.

- Resize Widget Height dialog can be launched either from drop down menu or short cut link in widget panel.
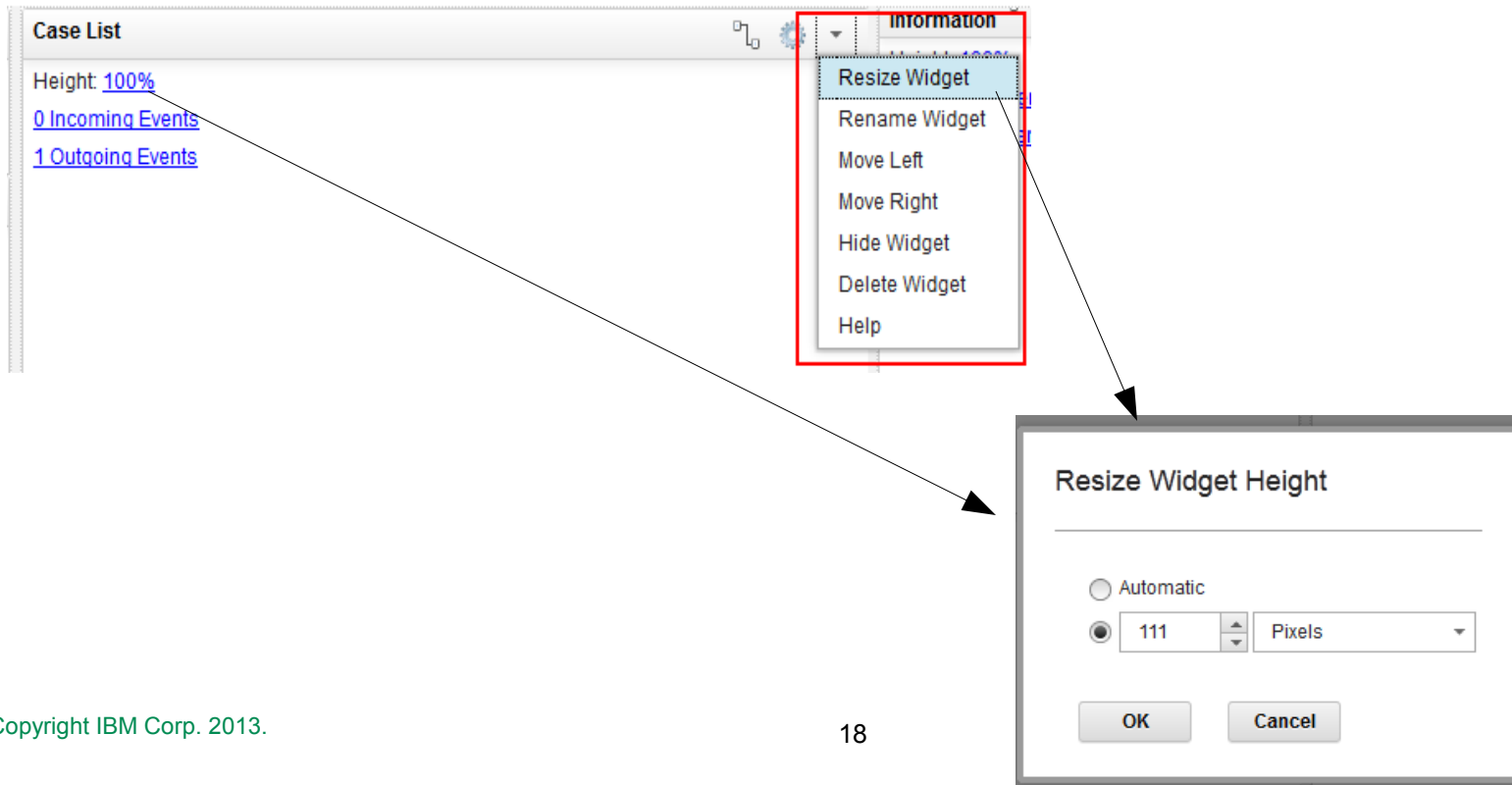
# Configuration settings for OOTB widgets

- In ICM 5.2, you are able to "Edit Settings" and "Edit Wiring" by widget toolbar menu or short cut information link in widget panel.
- Widget toolbar menu item will disappear if related property is not available in current widget.
  - For example, no visible widget property defined, then the Edit Settings menu item will not display.
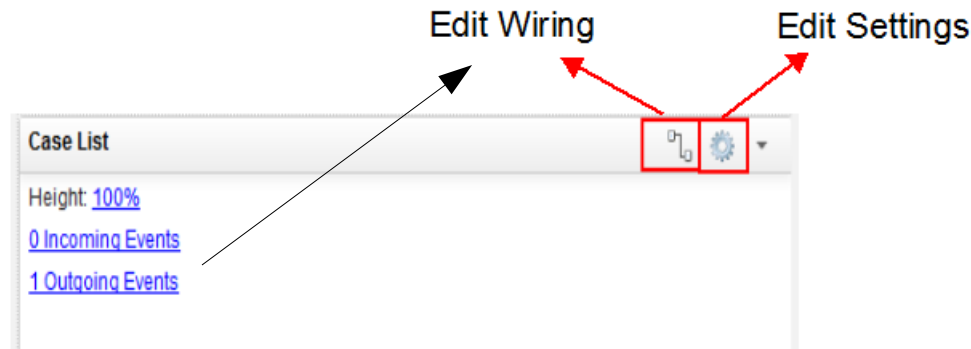
Editing Settings of Widgets

- ICM OOTB widget has an standard widget setting UI.

  - Settings

  - Menus

  - Toolbars
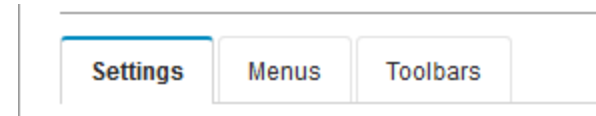
- Widget properties and setting UI are defined in widget definition file (JSON).

- Custom widget can define special widget setting UI

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Editing Settings of Widgets

Toolbar and menu customization
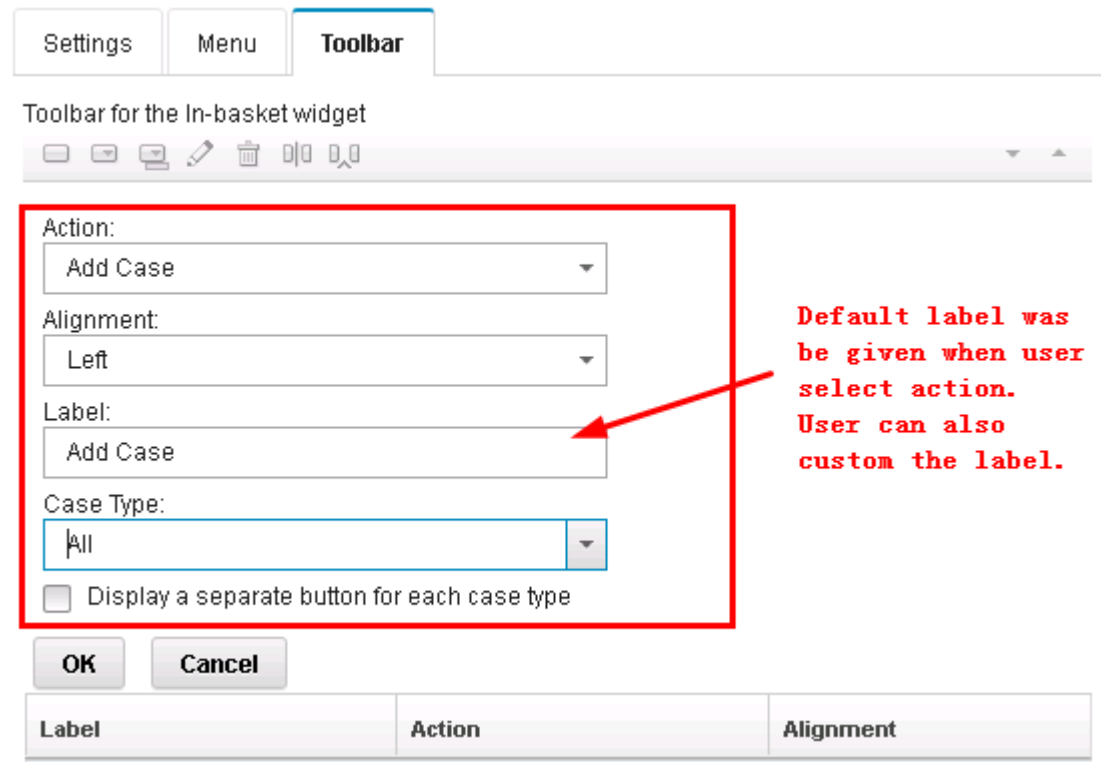
- User can use the following buttons to edit Toolbar/Menu.
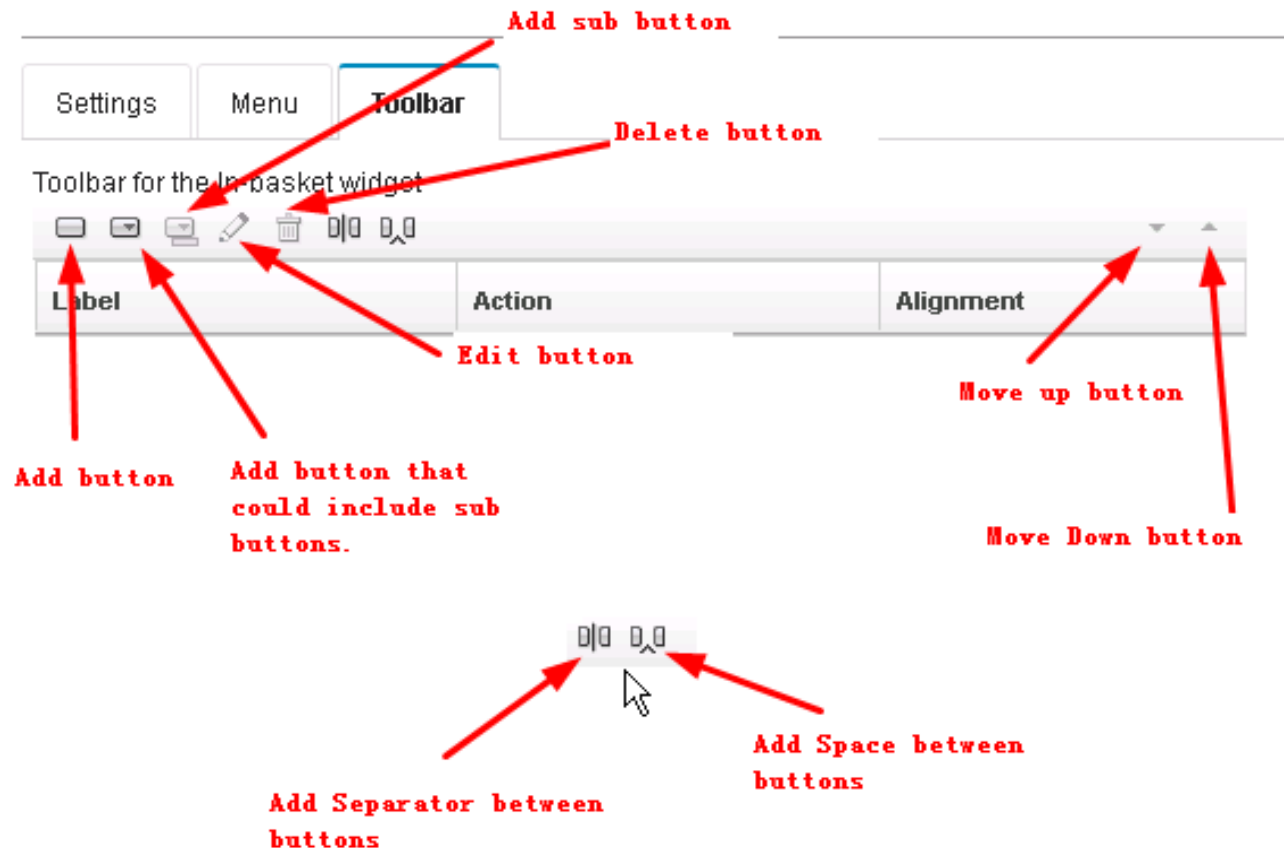
Toolbar and menu customization

- User can select the action from action list as button/menu, and give the button label and set other action properties.

Default label was be given when user select action. User can also custom the label.

Event Wiring of Widgets

- Wiring Event
- Disable/Enable broadcast event

Event Wiring of Widgets

- Action (button/menu)'s event will be managed in parent widget.
- If Action was added to Widget toolbar/menu list, the action event will be seen in widget outgoing event list and be with prefix *.

Outgoing Events for the Case Information

Outgoing event:		Target widget:	Incoming event:
Document selected	▼ ⇨	Page Container ▼	Add case ▼

	Event	**Target**	

Document selected
Document opened
Folder opened
Folder selected
Task selected
Send case history
Task status updated
*Document comment added
*Open add task page

Actions Event will be with prefix *.

Event name: *Document comment added
Event description: The new document comment was saved to the case.
Event type: Wiring
Action name: Add Comment to Document

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- Localization of page/widget custom input strings

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Using custom widget in page designer

- Customize widget can be registered by CMAC task or ACCM client
  - Definition of Custom widget in Widget Package
    - Widget Catalog file (JSON) → catalog.json
    - Widget Definition (JSON) → [widgetname].json
      - Widget metadata
      - Widget properties definition
        - Customization of widget property setting UI
      - Widget Outgoing event and incoming event(event handler)
    - Globalization of Widget Definition

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Sample of a widget package catalog (Json)
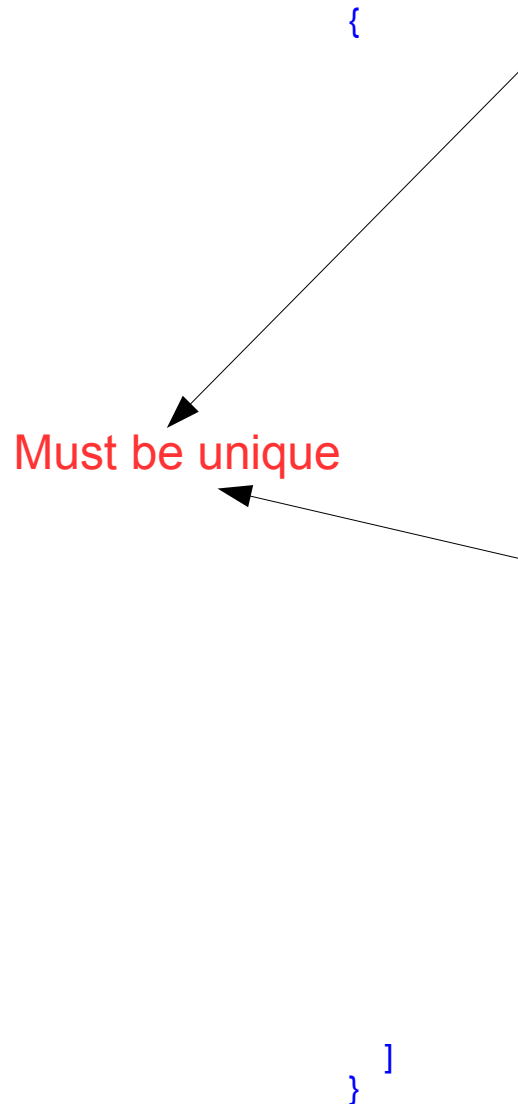
```json
{
    "Name":"IBM Case Manager custom widget package",
    "Description":"IBM Case Manager custom widget package",
    "Locale":"",
    "Version":"5.2",
    "Categories":[
        {
            "id":"CustomWidgets",
            "title":"Custom Widgets"
        }
    ],
    "Widgets":[
                    {
                    "id":"MyScriptAdapter",
                    "title":"My Script Adapter",
                    "category":"CustomWidgets",
                    "description":"A Script Adapter with different widget setting properties.",
                    "definition":"CustomSAWidget.json",
                    "preview": "images/caseinfo_preview.png",
                    "icon": "images/caseinfo_icon.png",
                    "runtimeClassName":"icm.pgwidget.scriptadapter.ScriptAdapter",
                    "help": "http://w3.ibm.com",
                    "previewThumbnail":"images/caseinfo_thumb.gif"
                    }
                ]
}
```

Must be unique

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Sample of a widget definition (Json)

```json
{
    "id":"MyScriptAdapter",
    "title":"My Script Adapter",
    "category":"CustomWidgets",
    "description":"A Script Adapter with different widget setting and more widget pro
    "definition":"CustomSAWidget.json",
    "preview": "images/caseinfo_preview.png",
    "icon": "images/caseinfo_icon.png",
    "runtimeClassName":"icm.pgwidget.scriptadapter.ScriptAdapter",
    "help": "http://w3.ibm.com",
    "previewThumbnail":"images/caseinfo_thumb.gif",
    "properties":[
        {
            "propertyType":"property",
    "type":"boolean",
    "id":"blockOutboundEvent",
    "defaultValue":false,
    "required":false,
    "visibility":true,
    "title":"BlockOutboundEvent_title"
    }
    ],
    "events":[
        {
    "id":"icm.SendEventPayload",
                            "type":"wiring",
    "title":"events_SendEventPayload_title",
    "direction":"published",
    "description":"events_SendEventPayload_description"
    }
    ]
}
```

Must be unique

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Widget property type supported in ICM5.2

- **Simple type**
  - Integer
  - String
  - Boolean
  - Float
  - Datetime
- **Action Container Type**
  - ContextualMenu
  - Toolbar
- **Solution metadata type**
  - CaseType
  - Task
  - View/ViewList
  - Role
  - Solution

- **Complex type**
  - Choicelist
  - Textarea
  - Scripts
  - Label
  - order

- **Group type**
  - Tab
  - Section
  - PropertyPanel
  - dropdown

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More samples of widget definition files

The Location of ICM OOTB Widget definition files after finishing installation and configuration:

[CaseManagerHome]/configure/properties/WidgetsPackage/[DOS_Name]/IBM Case Manager Widget package/

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Localization of strings in page

- Additional page resource file
  - The default resource file will be generated after deployment, customer can use it as the reference to provide localized resource files for different locales.
- Which kinds of string we can localize in page?
  - Page title
  - Toolbar button label
  - Menu label

Localization of strings in page

1. Using IBM® Content Navigator or IBM FileNet® Workplace XT, browse to the design_or_staging_object_store_name/IBM Case Manager/Solutions/solution_name/nls folder.

2. Download the Resources.js file.

3. Create your target locale directory in the original directory. For example, if your target locale is French, create the following directory: design_or_staging_object_store_name/IBM Case Manager/Solutions/solution_name/nls/fr. For a list of the supported non-English locales, see Planning for non-English installations. The locale values are not case sensitive. Use hyphen separators instead of underscores in the locale values. For example, specify en-us instead of en_us. If your solution locale is French and you want to translate the solution to English, use locale en.

4. Edit the downloaded Resources.js file. Change the value for the custom string to the translated value for your locale. For example, change the English value for a customized page title: "New Work": "New Work" to a localized title: "New Work":"Nouveau Travail"

5. Attention: The encoding of the Resources.js file must be set to UTF-8 or UTF-8 without BOM.

6. Make the same changes for any other customized strings that you want to translate.

7. Add the translated Resources.js file to the design_or_staging_object_store_name/IBM Case Manager/Solutions/solution_name/nls/fr folder as a document of Document class and as a major version. The document title must be Resources.js.

8. Repeat these steps for each language you want to translate to.

9. Redeploy the solution.

Course Summary

You have completed this course and can:

- Know how pages are classified in ICM5.2.

- Know how to design page.

- Know how to customize widget settings.

- Know how to customize widget toolbars and menus.

- Know how to wiring widgets and page.

- Know how to define custom widget.

- Know how to localization custom input string.

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Contacts

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- Product Manager: Dave Perman (dperman@ca.ibm.com)
- Subject Matter Experts (SME)/Area of Expertise:
- Support: Ted Dullanty (tdullanty@us.ibm.com)
- And so on.

Product Help/Documentation/Resources

- Case Manager 5.2 Information Center

  ➔ http://pic.dhe.ibm.com/infocenter/casemgmt/v5r2m0/index.jsp

- P8 5.2 Information Center

  ➔ http://pic.dhe.ibm.com/infocenter/p8docs/v5r2m0/index.jsp

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