



---

# IBM Case Manager 5.2.1 Enablement

Lab

Adding External Documents in  
Case and Attachments

---

# Contents

<b>Before You Begin.....</b>	<b>3</b>
Introduction.....	3
Documentation Conventions.....	3
<b>Adding External Documents to a Case.....</b>	<b>5</b>
Exercise 1 – Configure a CMIS repository.....	6
Exercise 2 – Enable the Case management solution to include external documents.....	12
Exercise 3 – Create a case and include external documents in the case.....	14



# Before You Begin


## Introduction

This hands on lab for Adding External Documents to a Case is meant for Business Analysts and Solution developers who want to reference documents from external repositories such as CM8, CMOD or CMIS enabled repositories in the case. In this lab, we will integrate a Case Management Solution with Alfresco CMIS repository and add documents from Alfresco to a case folder.

## Documentation Conventions

The following documentation conventions are used to assist in performing each task:

Convention	Explanation
<b>Bold</b>	Words that appear in boldface represent menu options, buttons, icons, or any object you click to cause the software to perform a task.  This typeface also represents anything that you must type or enter.
<i>italics</i>	In addition to book titles, italics are used to emphasize certain words, especially new terms when they are first introduced.
<b>Note</b>	This signifies information that emphasizes or supplements important points of the main text.
 <b>Important</b>	This signifies information essential to the completion of a task. You can disregard information in a note and still complete a task, but you should not disregard an important note.
 <b>Caution</b>	This alerts you to follow a recommended procedure carefully. Failure to do so may result in installation or configuration problems or other preventable conditions.

<b>Tip</b>	This suggests alternative methods that may not be obvious and helps you understand the benefits and capabilities of a feature or function. A tip is not essential to the basic understanding of the text.
	This symbol indicates the end of a note, caution, or tip.

<b>Convention</b>	<b>Explanation</b>
<b>Presentation</b>	The presentation provides conceptual information and background knowledge. Presentations take many forms: formal presentations, instructor lecture, or discussion.
<b>Exercise</b>	These are hands-on exercises used to reinforce the concepts and information covered in a presentation.

---

## Adding External Documents to a Case

In the labs for this unit you will configure a CMIS repository, make it available to the Case Management desktop and configure the solution to allow documents from the CMIS repository to be part of a case.

**What you'll learn in this section:**

1. How to configure a CMIS repository (Alfresco) in Content Navigator and Add the CMIS repository to the case manager desktop
2. Enable a case management solution to allow external documents in the case
3. Create a case and add documents from Alfresco repository to the case

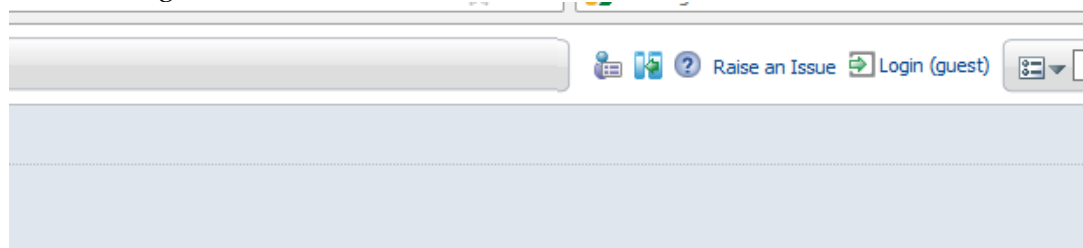
## Exercise 1 – Configure a CMIS repository

1. Start Alfresco by running the batch file on the desktop. First we will test Alfresco and create a user in the Alfresco repository.

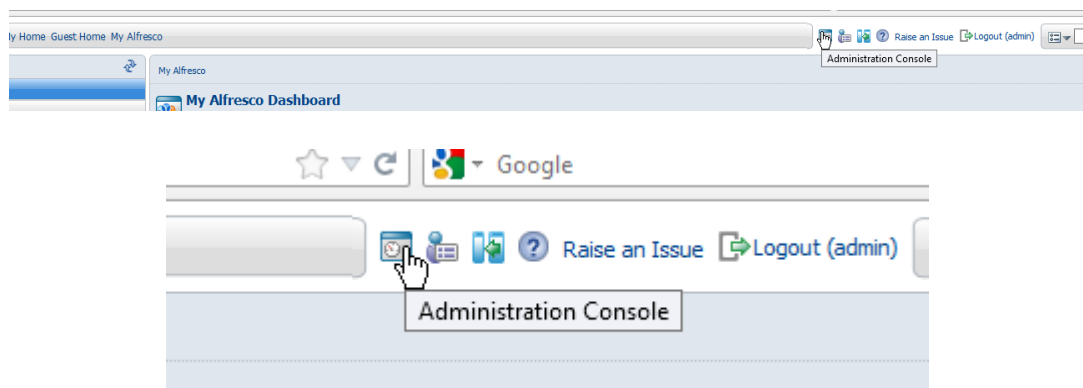


Step	Action
1	Navigate to the Alfresco URL to ensure that the server is accessible: <a href="http://localhost:8080/alfresco">http://localhost:8080/alfresco</a> Click on Login link
2	Enter the credentials to login: admin/filenet. After logging in, click on the Administration Console icon to create a new Alfresco user
3	Click on Manage System Users

- 1



- 2

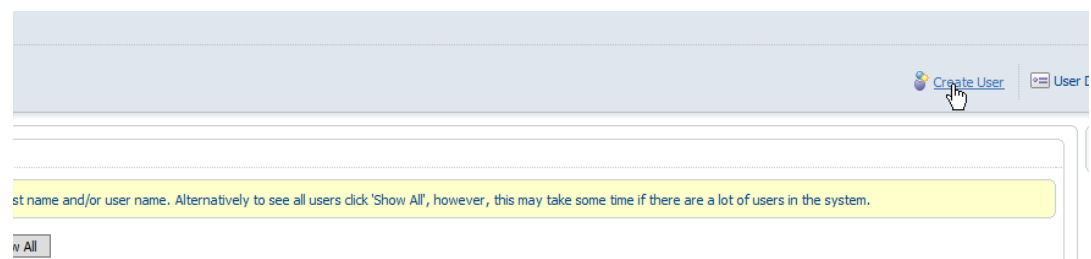


- 3

4



Click on Create User



5 Enter the details as shown below and click Next

**Step One - Person Properties**  
Enter information about this person.

Person Properties	
First Name:	P8Admin
Last Name:	P8Admin
Email	p8admin@ecm.ibm.local

- 6 Enter username as P8Admin and password filenet. Set the Home Space Name to P8Admin and click Next

**Step Two - User Properties**  
Enter information about this user.

**User Properties**

User Name:

Password:

Confirm:

**Home Space**

Home Space Location:

Home Space Name:

To continue click Next.

Review the Summary and click Finish

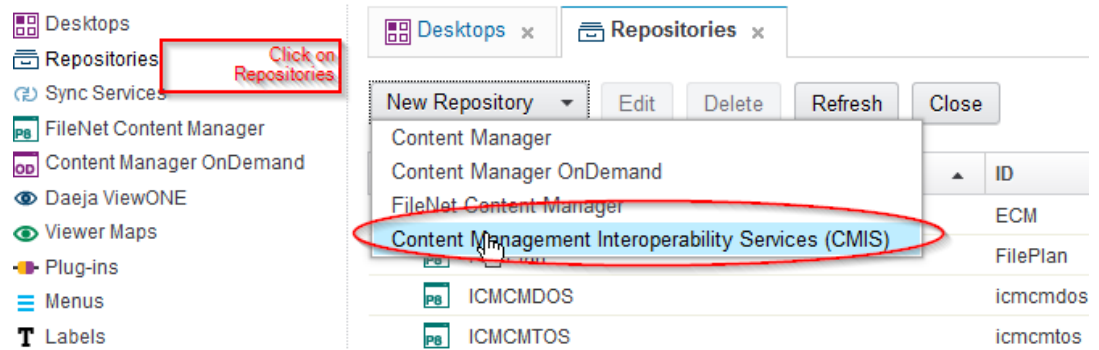
**Summary**  
The information you entered is shown below.

<b>Name:</b>	P8Admin P8Admin
<b>User Name:</b>	P8Admin
<b>Password:</b>	*****
<b>Home Space:</b>	P8Admin
<b>Email:</b>	p8admin@ecm.ibm.local
<b>Organization:</b>	
<b>Job Title:</b>	
<b>Location:</b>	
<b>Presence Username:</b>	
<b>Quota:</b>	

- 7 Login to the admin desktop of IBM Content Navigator:  
<http://ecmdemo1.ecm.ibm.local:9080/navigator?desktop=admin>  
using credentials P8Admin/filenet



## 8 Click on Repositories and create a new CMIS repository as shown below



## 9 Enter the details as shown below and click Connect.

### Content Management Interoperability Services (CMIS) repository: **New Repository**

**General** Configuration Parameters System Properties Browse Search

You must connect to the repository before you configure parameters, system properties, folders, and so on.

\* Display name: ?

\* ID: ?

\* CMIS AtomPub binding service document URL: ?

\* CMIS Repository ID: ?

Enter the user credentials to connect to the Alfresco repository as P8Admin/filenet

- 10 Upon successful connection, you will notice the remaining tabs enabled in Content Navigator. Click on the tabs and view the configuration settings. Click Save and Close to save the repository settings



### Content Management Interoperability Services (CMIS) repository: **New Repository**



You must connect to the repository before you configure parameters, system properties, folders, and

\* Display name: ?

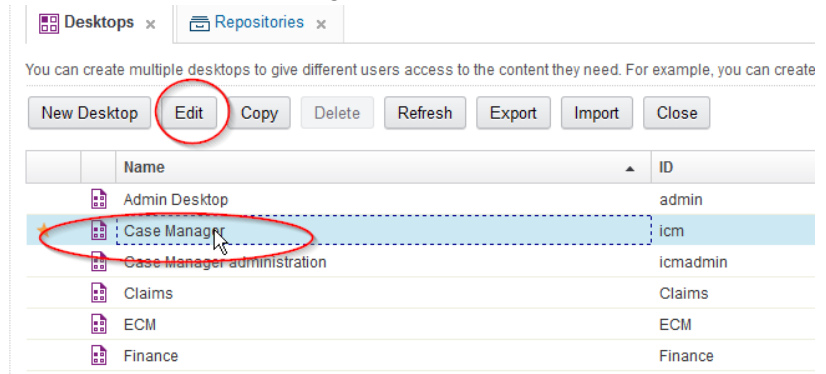
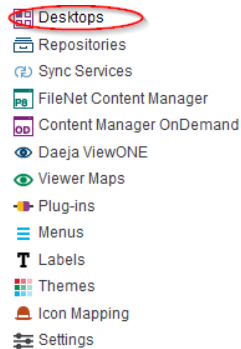
\* ID: ?

\* CMIS AtomPub binding service document URL: ?

The Next step is to expose the CMIS Alfresco repository to the Case Manager desktop.

## Step Action

- 11 Click on Desktop and choose the Case Manager desktop and click Edit



- 12 Click on the Repositories tab, and move the Alfresco repository from the Available list to the Selected list.

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
Alfresco	ICMCMTOS
ECM	
File Plan	
ICMCMDS	

Add

Save and Close Save Reset Close

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
ECM	ICMCMTOS
File Plan	Alfresco
ICMCMDS	

Click on Save and Close to save the configuration changes.

## Exercise 2 – Enable the Case management solution to include external documents

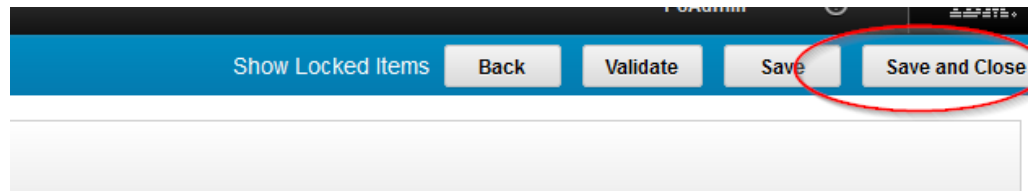
In the previous exercise we configured the Alfresco repository and added it to the Case Manager navigator desktop. The Case manager navigator desktop is the Case client application. In this exercise, we will configure the solution to allow case workers to add documents from the Alfresco CMIS repository.

In this exercise, we will work with the Abyss Spill Claims Management Solution.

Step	Action
1	Login to the Case Builder by going to the URL: <a href="http://ecmdemo1.ecm.ibm.local:9080/CaseBuilder">http://ecmdemo1.ecm.ibm.local:9080/CaseBuilder</a> and use credentials p8admin/filenet
2	Open the Abyss Spill Claims solution and click on the Case Types → Boat Damage case type: <div data-bbox="399 787 1421 1533" data-label="Image"> </div>
3	Enable the check box to allow documents from external repository to be included in the case as shown below:

Step	Action
ers	<p>Case type name: Boat Damage</p> <p>* Case type unique identifier: ASC_ BoatDamage</p> <p>Case type description: Injury to or economic loss resulting from damage to a boat (a subset of property damage).</p> <p>Starting document type: &lt;None&gt;</p> <p>External repository:</p> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Allow documents and attachments from repositories other than the case management object stores</li> <li><input type="checkbox"/> Display system-generated titles initially instead of the original document titles</li> <li><input type="checkbox"/> Enable case workers to create custom tasks</li> </ul> <p>Default layout for Add Case page: Add Case</p>

#### 4 Click on Save and Close



### Summary

In this section you:

- Configured the Case Type to include external documents in the case

## Exercise 3 – Create a case and include external documents in the case

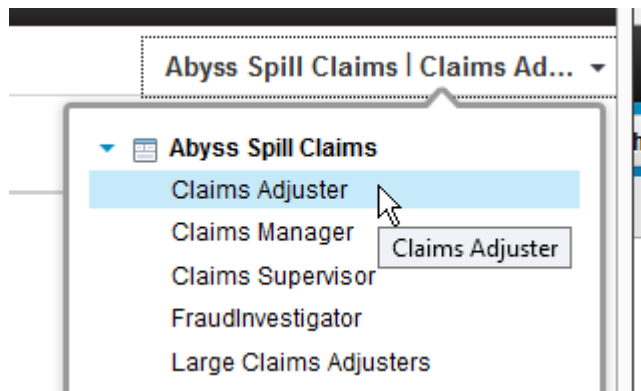
In this step, we will deploy the solution after making the required changes in Exercise 2, create a case and search for a document to be included in the case. Although we are directly adding documents to the case, tasks with attachments can reference documents in the external repository as well.

Step	Action
------	--------

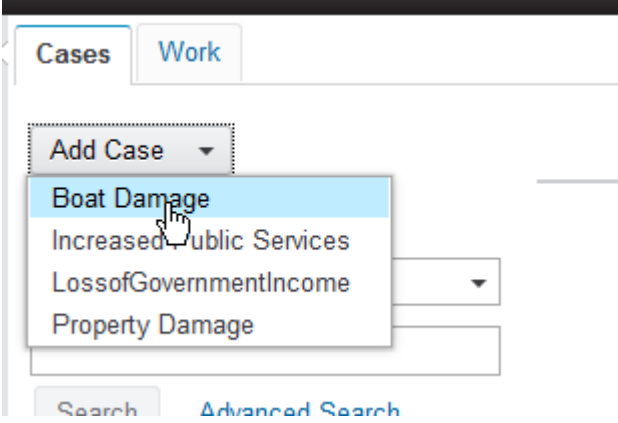
- |   |   |
|---|---|
| 1 | Deploy the Abyss Spill Claims solution: |
|---|---|



- |   |  |
|---|--|
| 2 | After successful deployment, click on the Test link to launch the Case Client. Switch role to Claims Adjuster: |
|---|--|



- |   |  |
|---|--|
| 3 | Click on the Cases tab and click on Add Case → Boat Damage |
|---|--|

Step	Action
	

4 Enter the following Case Details in the Add Case Page:

▼ Claimant Information

First Name	<input type="text" value="John"/>
Last Name	<input type="text" value="Adams"/>
Address	<input type="text" value="100 Main Ave"/>
City	<input type="text"/>
State	<input type="text" value="Louisiana"/>
Zipcode	<input type="text"/>
Contact Number	<input type="text"/>

---

Step	Action
------	--------

---

▼ Claim Information

Claim Property Name

ABC Vessel

Incident Date

1/7/2015



12:00 AM



Make

Honda

Model

Year

2,010

Claim Amount

50000

Click on Add to create a case

5

Search for the newly created case in the Cases Page

Cases Work

Add Case ▼

Search:

First Name ▼

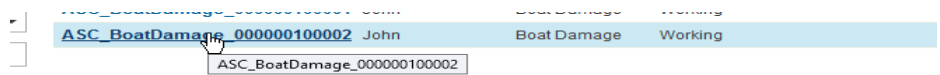
John

Search Advanced Search

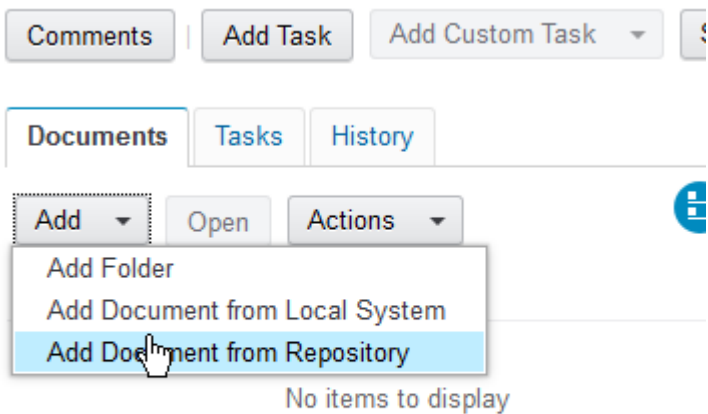


Step	Action
------	--------

6 Open the Case to view the Case Details:



7 In the Documents tab, select the Claims Submission folder and click on the Add → Add Document from Repository:

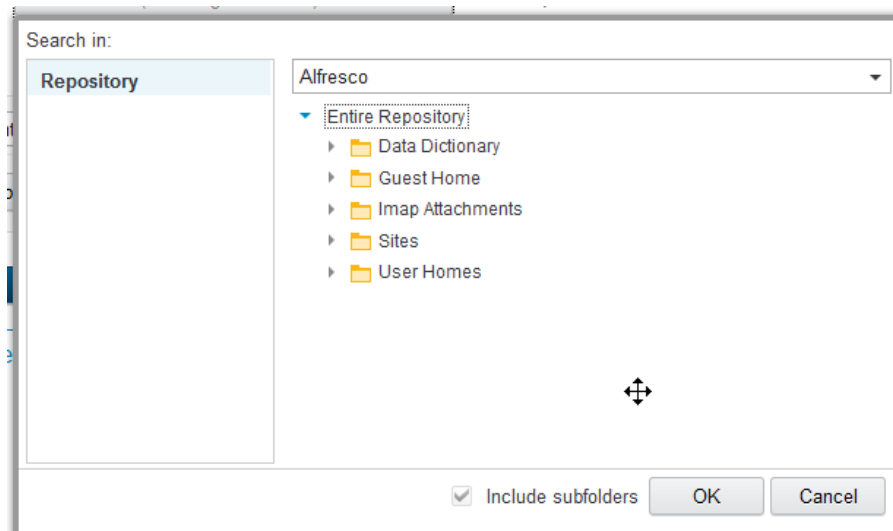
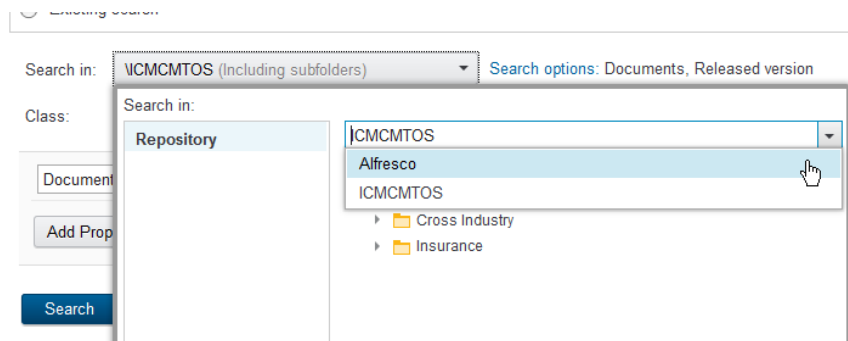


---

Step	Action
------	--------

---

6	Select the Alfresco repository to search documents and click OK
---	---



---

7	Under the selection criteria, choose the Name property
---	--

---

Step	Action
------	--------

Class:	cmis:document
--------	---------------

Find items with the following terms: ?

*Use a combination of terms and operators: \* ? or ""*

Base Type Id	?	Equals	
--------------	---	--------	--

Base Type Id  
Content Stream Filename  
Content Stream Length  
Content Stream MIME Type  
Created by  
Creation Date  
Last Modified By  
Last Modified Date  
**Name**  
Object Id  
Object Type Id

Properties  
Property options: Match all  
Results Display  
☐ Keep search criteria open

8	Enter the search criteria as below and click on Search
---	--

Find items with the following terms: ?

*Use a combination of terms and operators: \* ? or ""*

Name	?	Like	turbine
------	---	------	---------

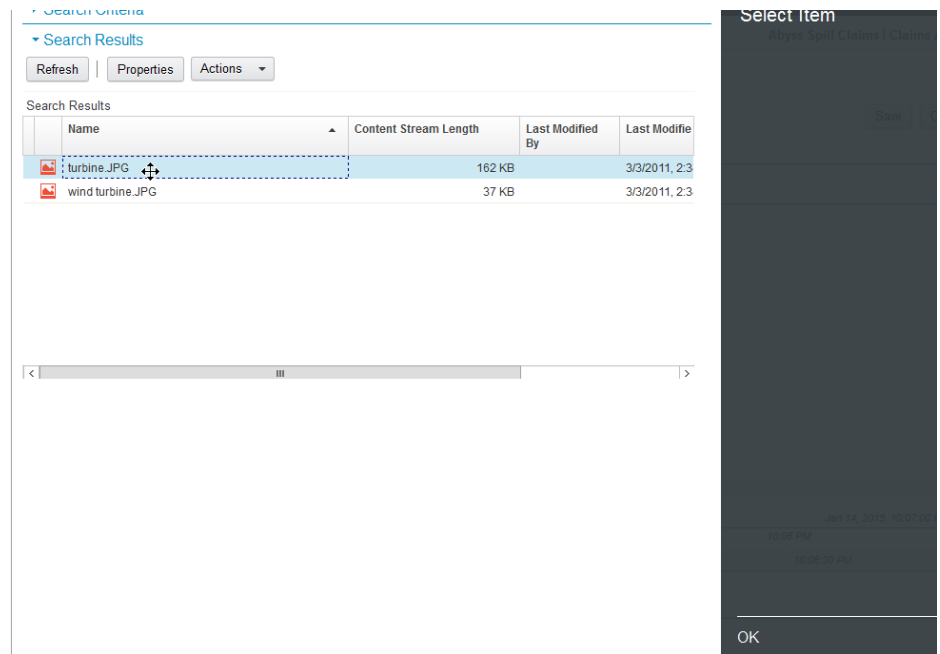
Property options: Match all

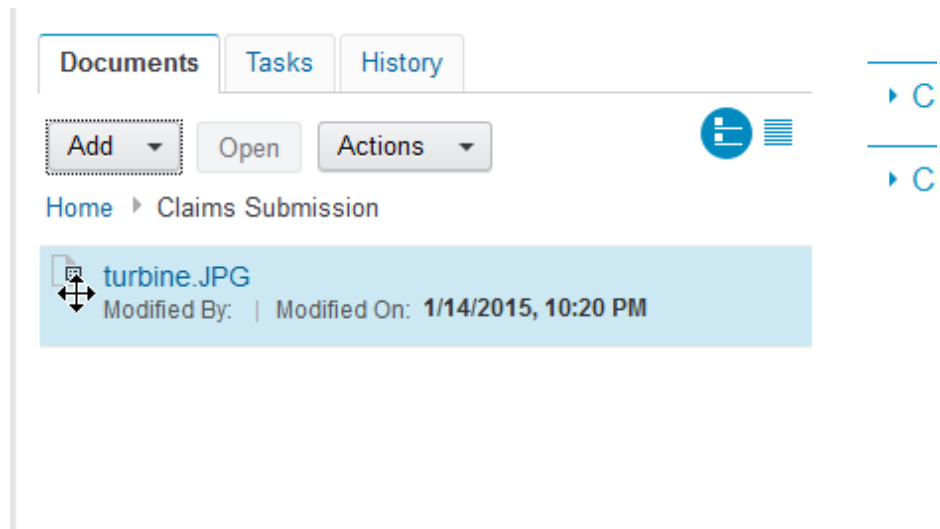
☐ Keep search criteria open

Step	Action
------	--------

9	Select the turbine.jpg and click OK
---	-------------------------------------



Notice, that the document is now added to the case.



Right click on the document to view and explore the menu options.  
Click on Save in the Case Details and close the Details page.

Stop the Alfresco application by running the Stop Alfresco server batch file from the desktop:



---

## Summary

---

In this section you:

- Created a case and added a document from the Alfresco CMIS repository to the case.
- 

## For additional references:

- IBM Case Manager V5.2 Information Center – Designing the case management client application topic  
<http://pic.dhe.ibm.com/infocenter/casemgmt/v5r2m0/topic/com.ibm.casemgmt.help.doc/acmwrh00.htm>
- Selected sessions from IBM Case Manager V5.2.1 Product Implementation and Maintenance Training (PIT / PMT):

02-ICM 5.2.1 External Documents in Case and Attachments.ppt