



- 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

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

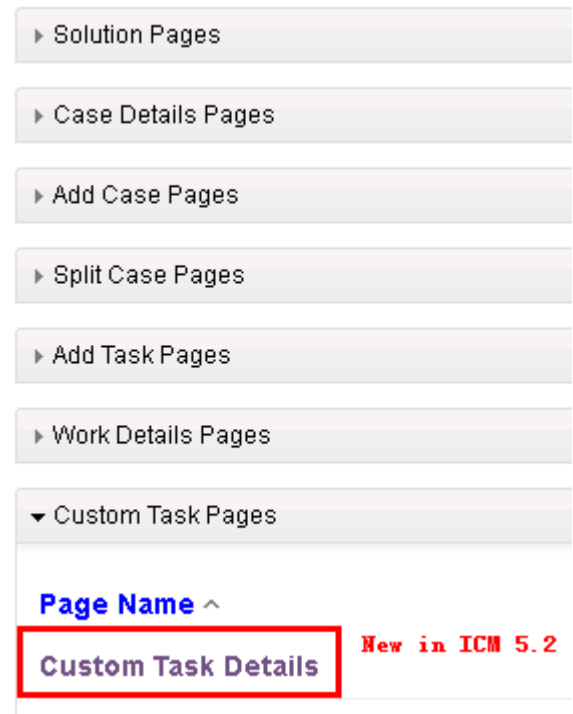
Add Task, Add Task Form

- Work Details Pages

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

- Custom Task Pages

Custom Task Details



Page Management in Case Builder

IBM Case Manager Builder

p8admin

Manage Solutions \ BVT0703

Show Locked Items Validate Save Save and

BVT0703

Edit solution description
Solution prefix: B0703
Created by p8admin
Created on July 3, 2013

Properties Roles In-baskets Document Types **Pages** Case Types

Add Page OK All

Link and menu to launch page designer

Page Name ^	Description ^
Case Details	View and update the properties for a case, add d...
Case Details Form	View and update the properties for a case by using th...

Page Management in Case Builder

IBM Case Manager Builder

Manage Solutions \ **Credit Card Dispute Management** Show Locked Items Validate Save Save and Close

Credit Card Dispute Management
Solution for managing disputed credit card transactions.
Solution prefix: CCDM
Created by p8admin
Created on July 27, 2013

Properties Roles In-baskets Document Types Pages Case Types

Add Role OK All

* Role: Customer Service Representative Description: First point of contact for the customer. OK Cancel

Role Settings Pages

Assign Page

Name
Cases
Work

IBM Case Manager

Cases Work

Add Case

Search:
Assigned Date
8/3/2013
Search Advanced Search

Credit Card Dispute Management | Customer Service Representative

No items to display

Course Roadmap

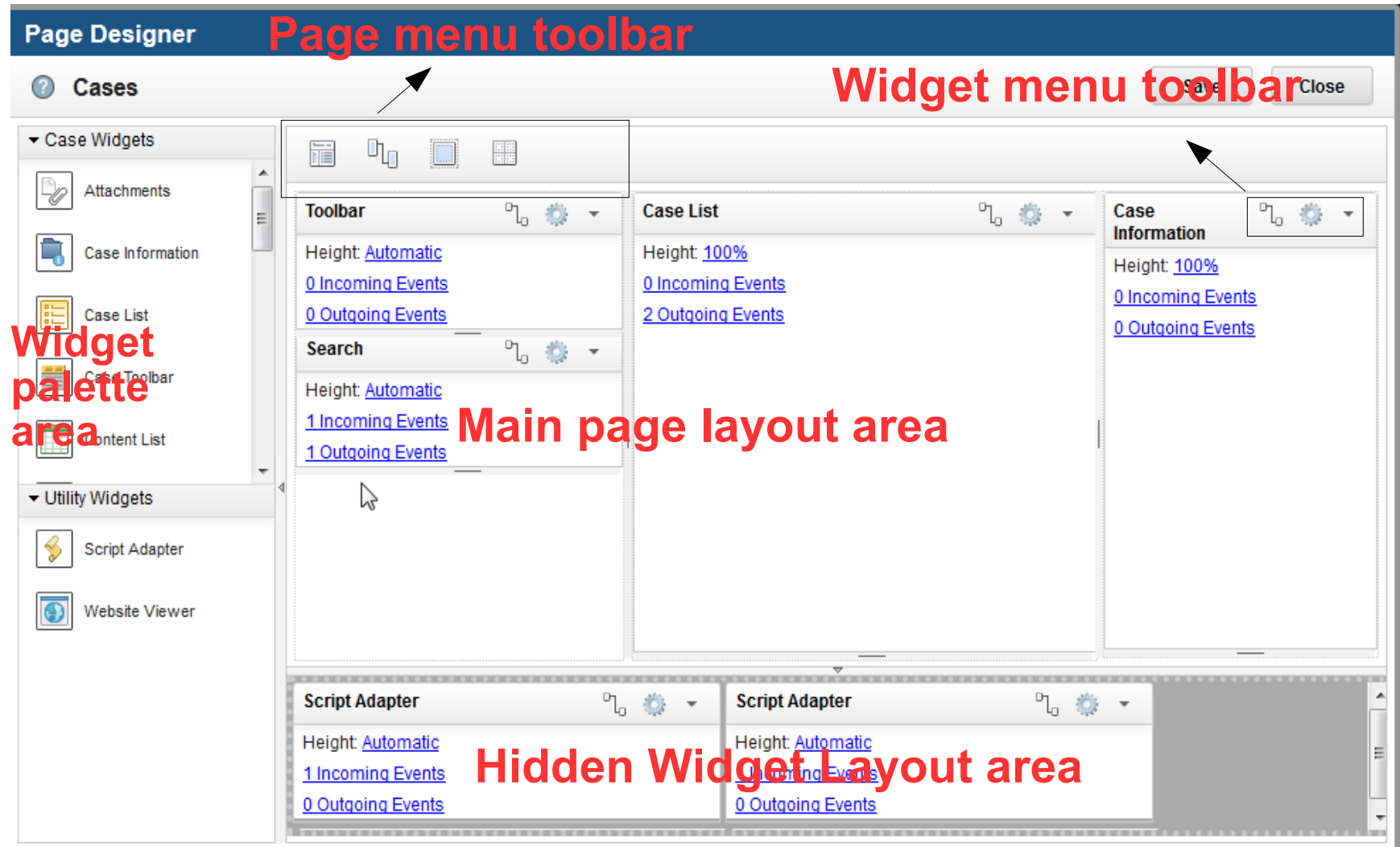
- Page Management in Case Builder
- ➔ Page Designer Overview
- Page Function Features
- Configuration settings for OOTB widgets
- Custom widgets and widgets' properties definition
- Localization of page/widget custom input strings

Page 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

Layout Style

Select Layout

Measurement
☐ 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:
 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

The diagram illustrates the relationship between a set of icons and three different settings windows. A central row of four icons is shown: a document with a list, a document with a flowchart, a document with a circuit board, and a document with a grid. Arrows point from these icons to three windows:

- An arrow from the first icon (document with a list) points to the 'Wire Events' window.
- An arrow from the second icon (document with a flowchart) points to the 'Hidden widget' window.
- An arrow from the third icon (document with a circuit board) points to the 'Page border setting' window.

The 'Wire Events' window is titled 'Wire Events' and contains a 'Widget' dropdown menu set to 'Page Container'. Below this are two tabs: 'Event Wiring' (selected) and 'Event Broadcasting'. The 'Event Wiring' tab shows a section for 'Add wires to establish communication between widgets. Ar'. The 'Hidden widget' window is titled 'Hidden widget' and contains a large area with the text 'Drag and drop widgets into this area.' The 'Page border setting' window is titled 'Page border setting' and contains a large area with the text '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:

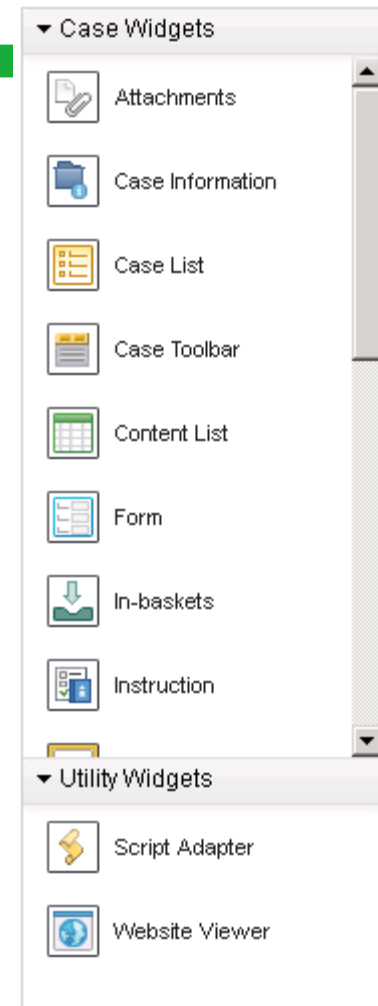
- Case Widgets:

Attachments,
Case List,
Content List,
In-baskets,
Original Case,
Properties,
Select Case Documents,
Timeline Visualizer,
Viewer,

Case Information,
Case Toolbar,
Form,
Instruction,
Process History
Search,
Split Case,
Toolbar,
Work Item Toolbar

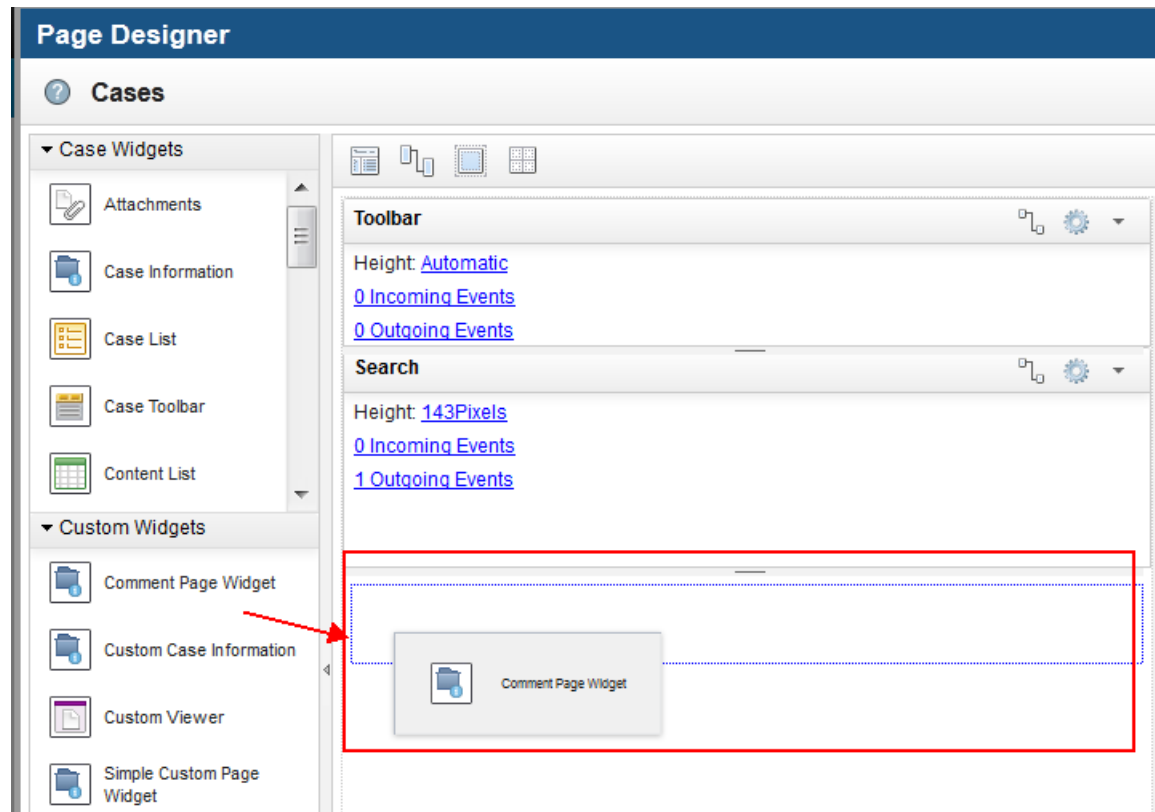
- Utility Widgets:
Script Adapter,

Website Viewer



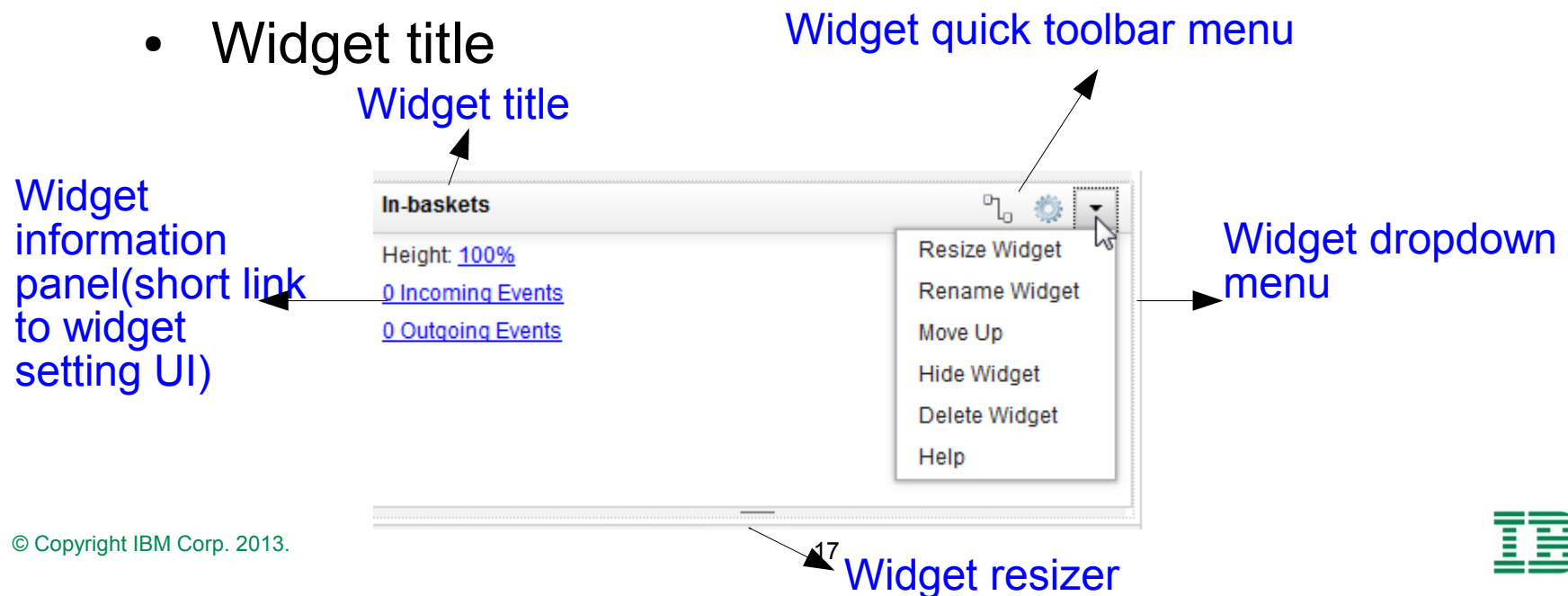
Configuration settings for OOTB widgets

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



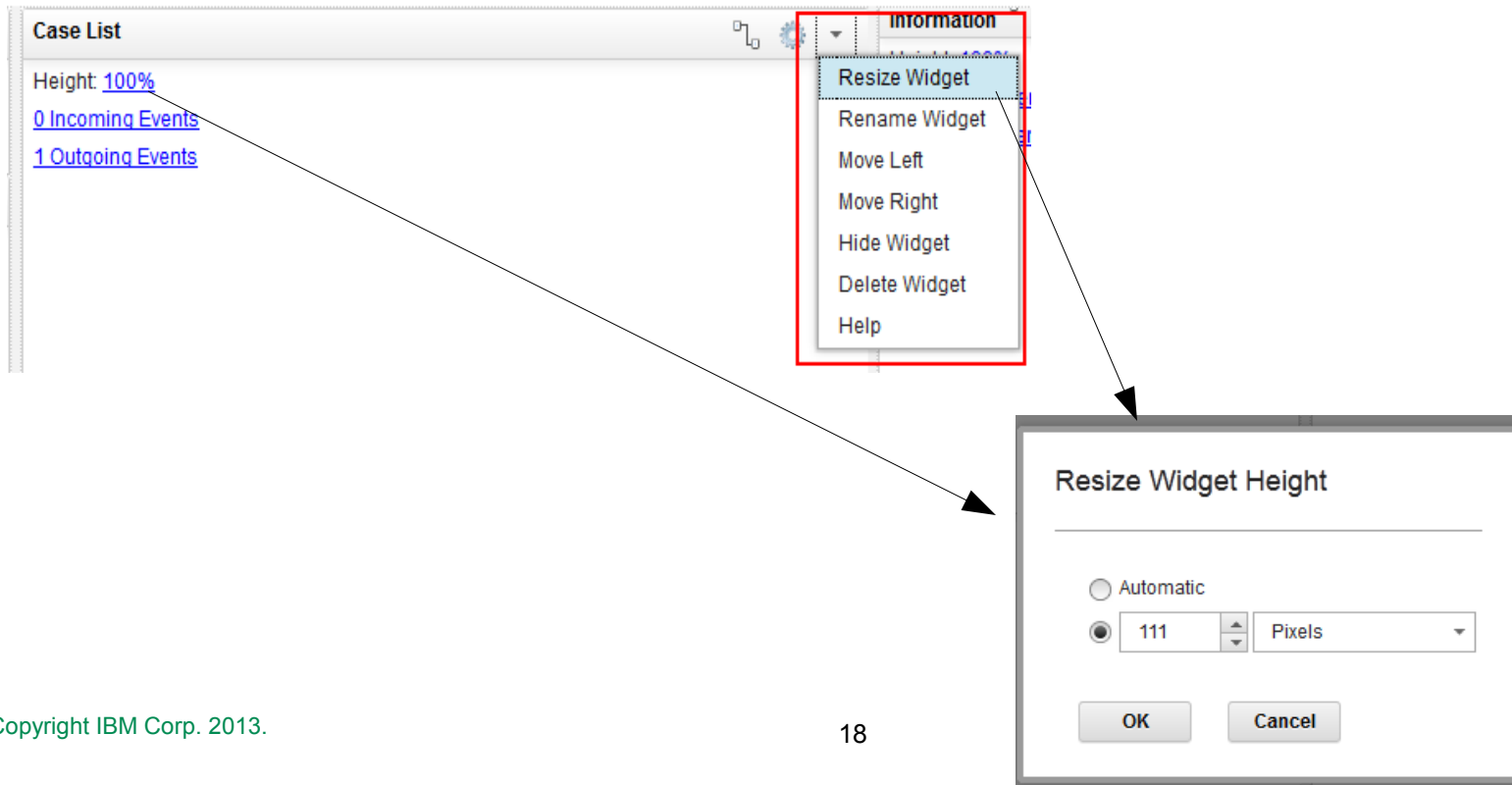
Configuration settings for OOTB widgets

- 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



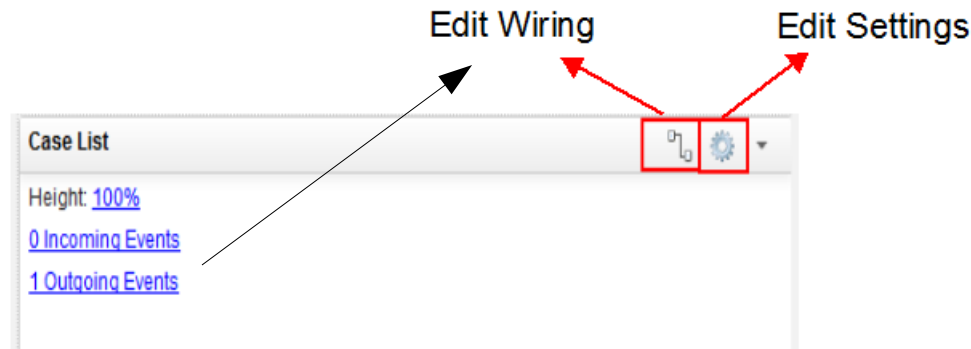
Configuration settings for OOTB widgets

- 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

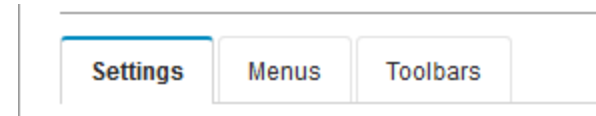
- In ICM 5.2, you are able to “Edit Settings” and “Edit Wiring” by widget toolbar menu or short cut information link in widget panel.
- Widget toolbar menu item will disappear if related property is not available in current widget.
 - For example, no visible widget property defined, then the Edit Settings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

Editing Settings of Widgets

Case Information

Settings | Menu | Toolbars

Select the views to display in the Case Information widget and view. [Learn More](#)

☒ Display the case ID in the Case Information widget

Available Views:

Set tab visibility and set tab order:

<input checked="" type="checkbox"/>	Summary	↑ ↓
<input type="checkbox"/>	Documents	
<input type="checkbox"/>	Tasks	
<input checked="" type="checkbox"/>	History	

▼ Documents

Select the default view:

Details View

☒ Allow user to switch between views
☐ Open documents in a separate browser window

Case Information

Settings | **Menu** | Toolbars

Menu for:

Documents view (Documents)

Label	Action
Open	Open
Preview	Preview
Download	Download
Download All	Download All
Properties	Edit Properties
Comments	Add Comment to Document
-----	Separator
Print	Print

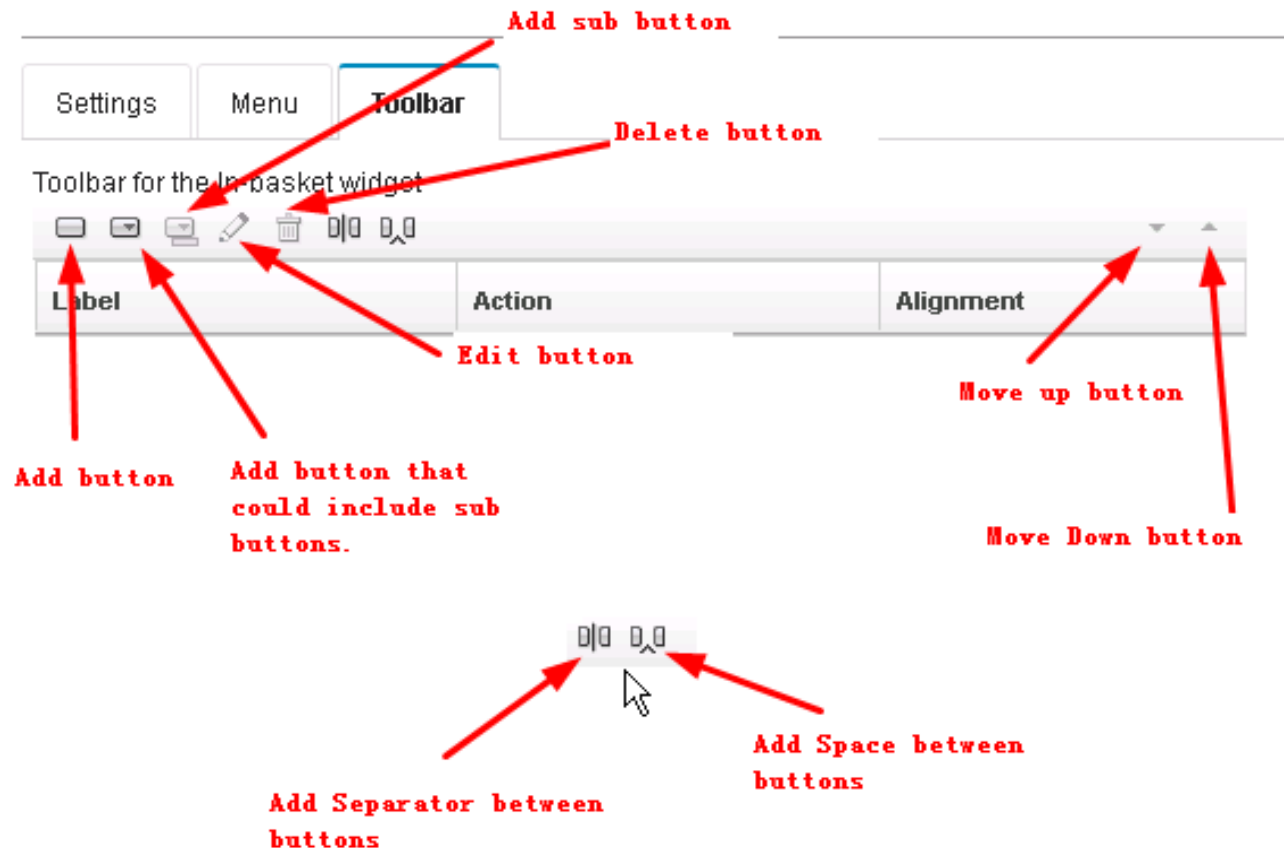
OK

Cancel

Toolbar and menu customization

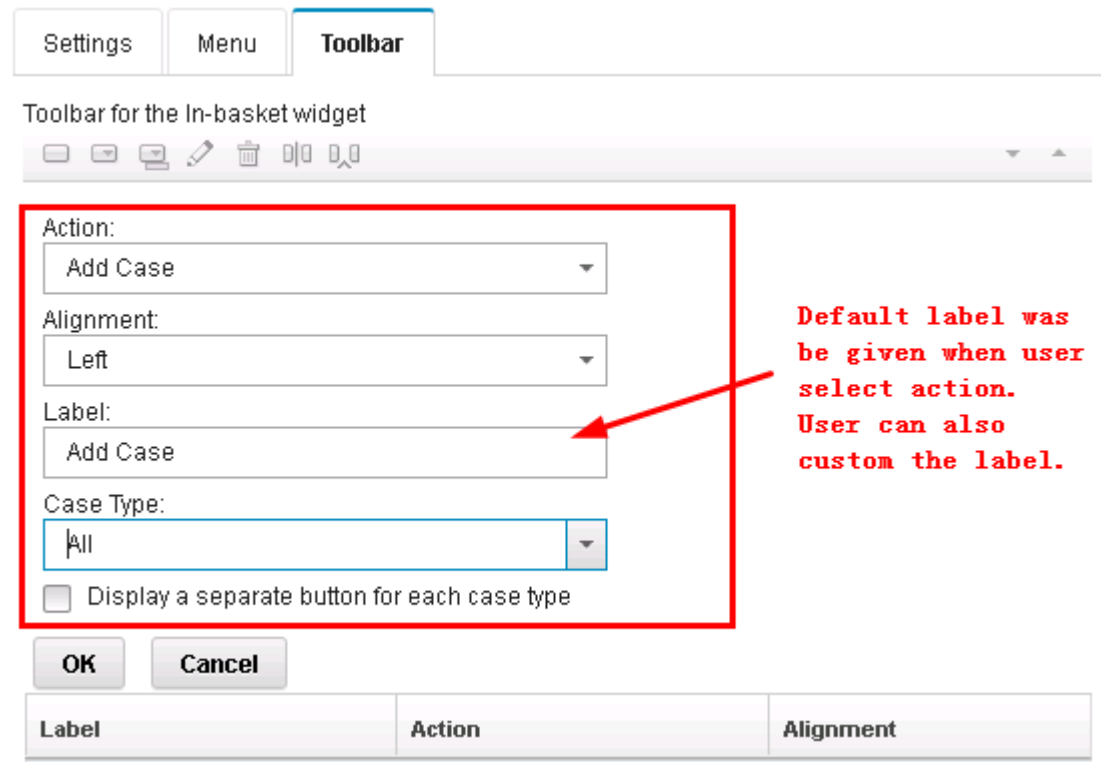
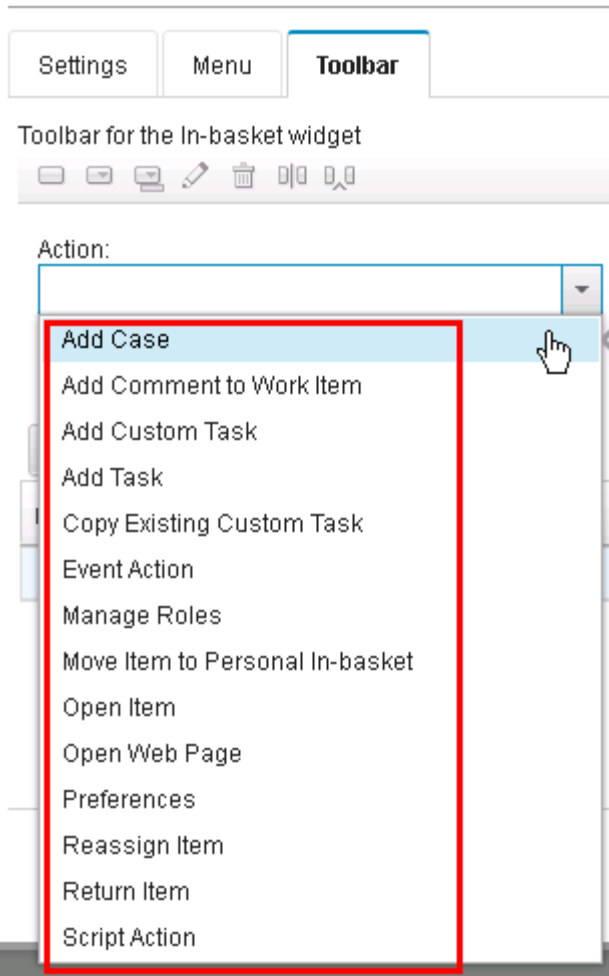
- User can use the following buttons to edit Toolbar/Menu.

In-baskets



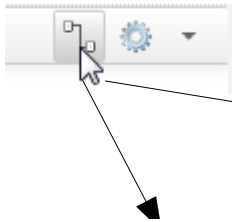
Toolbar and menu customization

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



Event Wiring of Widgets

- Wiring Event
- Disable/Enable broadcast event



Wire Events

Widget Case Information

Event Wiring Event Broadcasting

Add wires to establish communication between widgets. An asterisk (*) identifies an event related to an action. [Learn More](#)

Wire Events

Widget Case Information

Event Wiring **Event Broadcasting**

If you disable a broadcast event, you must provide an alternative way for the widget to communicate with other widgets. [Learn More](#)

Enabled	Event Title	Event ID
<input checked="" type="checkbox"/>	Document opened	icm.OpenDocument
<input checked="" type="checkbox"/>	*Open add task page	icm.AddTask

Incoming Events for the Case Information

Source widget: Page Container Outgoing event: Page Closed Incoming event: Send case information **Add Wire**

Source	Event	Target	Event
--------	-------	--------	-------

Outgoing Events for the Case Information

Outgoing event: Document selected Target widget: Page Container Incoming event: Add case **Add Wire**

Source	Event	Target	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:

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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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

Sample of a widget package catalog (Json)

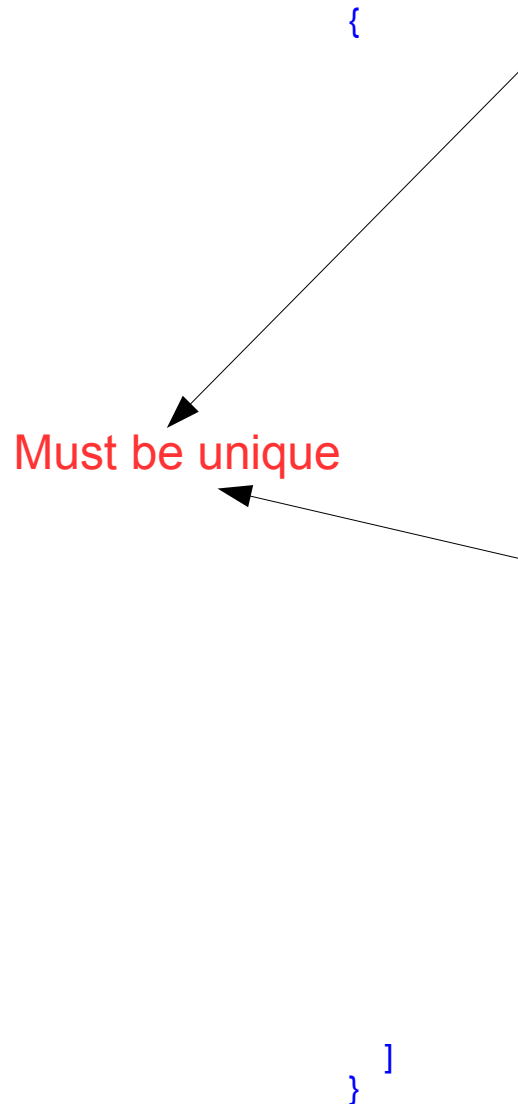
```
{
  "Name": "IBM Case Manager custom widget package",
  "Description": "IBM Case Manager custom widget package",
  "Locale": "",
  "Version": "5.2",
  "Categories": [
    {
      "id": "CustomWidgets",
      "title": "Custom Widgets"
    }
  ],
  "Widgets": [
    {
      "id": "MyScriptAdapter",
      "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

Sample of a widget definition (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



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

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/

Course Roadmap



- Page Management in Case Builder
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- ➔ Localization of page/widget custom input strings

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.

Contacts



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- Product Manager: [Dave Perman \(dperman@ca.ibm.com\)](mailto:dperman@ca.ibm.com)
- Subject Matter Experts (SME)/Area of Expertise:
- Support: [Ted Dullanty \(tdullanty@us.ibm.com\)](mailto: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>