IBM Case Manager 5.2.1 Enablement

Lab

Case Client customization using Case Model API

Contents

Before You Begin

Introduction

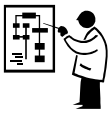
This hands on lab for Case Client Customization using Case Model API is meant for the Application Developer to learn about how to interact and customize a case solution with the new IBM Case Manager V5.2.1 out of the box widgets.

Documentation Conventions

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

Convention	Explanation
Bold	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.
italics	In addition to book titles, italics are used to emphasize certain words, especially new terms when they are first introduced.
Note	This signifies information that emphasizes or supplements important points of the main text.
 **Important**	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.
 **Caution**	This alerts you to follow a recommended procedure carefully. Failure to do so may result in installation or configuration problems or other preventable conditions.
 **Tip**	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.

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

Hands on Lab

Case Client Customization using Case Model API

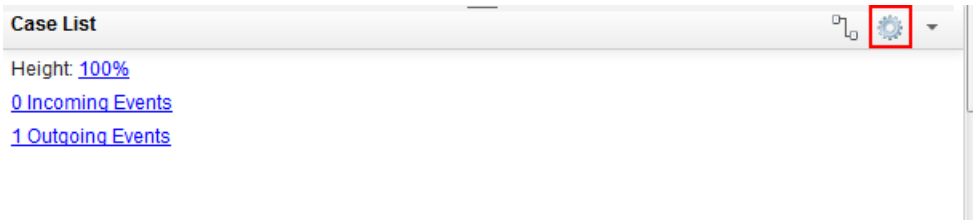
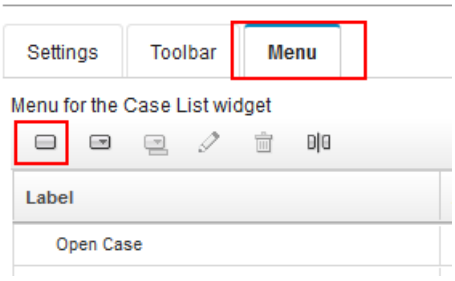
In the labs for this unit you will customize and work with out of the box (OOTB) widgets in IBM Case Manager 5.2.1.

What you'll learn in this section:

1. How to customize out of the box widgets in the IBM Case Manager v5.2.1
2. Extend functionality from out of the box widgets using toolbar
3. Extend functionality from out of the box widgets using actions
4. Explore the new widgets in IBM Case Manager v5.2.1

Exercise 1 – Adding a custom menu action

In this exercise, you will learn about how to add a custom script action using the menu item on the Case List out of the box widget. This custom script action is one way to execute a script within one of the out of the box widgets like Case List.

Step	Action
1	Go to Case Manager Builder and click **Edit** on your newly created solution, **Credit Card Disputes HOL**, from the previous lab. The Case Manager Builder URL is: http://localhost:9081/CaseBuilder Login as **p8admin** with the password **filenet**
2	Click on the **Pages** tab and then under **Solution Pages**, click on the **Cases** page.
3	Click on the **Settings** button for the Case List widget. 
4	Click on the **Menu** tab, then click on the **Add Menu Item** button. 

Step	Action

5	Select **Script Action** as the action and then write **Script Action Custom** as your label. Then, fill in the following JavaScript for the **execute section.** This script checks against the Case Title to see if it matches with a variable set. In this script below, we are grabbing the value of the case from the Case List widget using this.getActionContext("CaseReference");. Then, we are performing a simple if statement to check against the first element in the array that is given from the function call this.getActionContext("CaseReference");.
	
	`var x = this.getActionContext("CaseReference");`
	`var c = "CCD2_ManageDispute_000000100001";`
	
	`if(c == x[0].getCaseTitle())`
	`{`
	`alert("This is a special case, please review this case.");`
	`}`
	`else`
	`{`
	`alert("This is a normal case, please proceed.");`
	`}`
	
	Then scroll down and select **OK.**

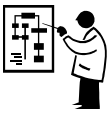
6	You should see your Script Action Custom in the list of menu actions for the Case List widget. Click the **OK** button to exit out of the Case List dialog window.
7	Click the **Save** button then the **Close** button at the top right of the Page Designer window.
8	Click the **Save and Close** button on the solution to exit the solution editor.
9	Hover the mouse over the solution and click **Deploy**. Click the **Deploy** button on the confirmation dialog window. Wait for the green check mark to appear next to the solution.
10	Hover the mouse over the solution and click **Test** to open Case Client.

Step	Action
11	Now we can validate the new custom action that we added to the Case List out of the box widget. In the Search text box of the Search widget, enter **%** and click the **Search** button.  If your search does not reveal any already created cases, please go ahead and make a new case then re-do this step.
12	Notice that your newly created case from the previous lab shows up in the Case List widget. We will validate your custom script action. Right click on the case and select **Script Action Custom**. Note that the dialog box shows up. Close the dialog box.
13	Click the **Add Case** button and select **Manage Disputes**.
14	Enter values for the newly created case and click **Add** to add the case.
15	Click the S**earch** button again with **%** as the value to search on. Validate that you now see two cases on the Cases page. Right click and select **Script Action Custom** on the second newly created case. Notice that there is a new dialog message.
16	Close the Case Client window.

Summary

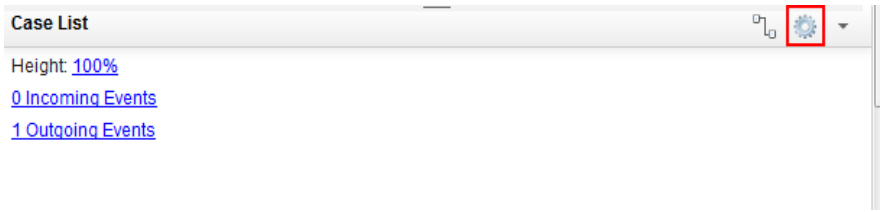
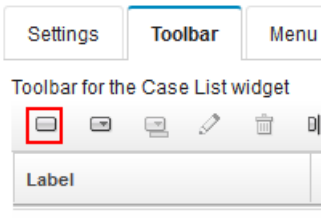
In this section you:

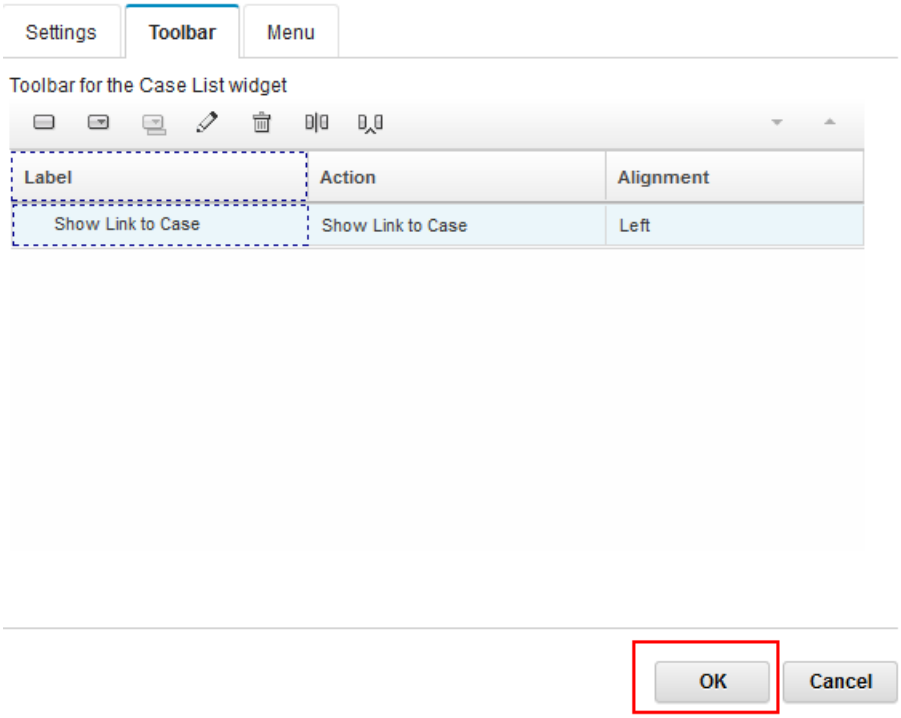
- Added a custom menu action using a script

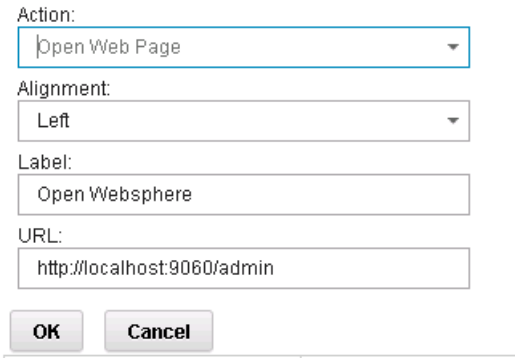


Exercise 2 – Adding a custom toolbar action

In this exercise, we will add a custom toolbar action. This exercise demonstrates one way to customize the toolbar to add functionality. In this exercise, it is a simple way to add a button to open a web page within the toolbar.

Step	Action
1	Click **Edit** on the Credit Card Disputes HOL solution.
2	Click on the **Pages** tab and then under **Solution Pages**, click on the **Cases** page.
3	Click on the **Settings** button for the Case List widget. 
4	Go to the **Toolbar** tab and select the **Add Button** button. 
5	Select **Show Link to Case** as the action and add **Show Link to Case** as the label. Then click **OK**.

Step	Action
6	Validate that you see your newly added toolbar action. Then click **OK** at the bottom to exit the Case List settings dialog window. 
7	Click the settings button next to the Toolbar widget. We are now going to edit the settings for one of the out of the box widgets, Toolbar. 

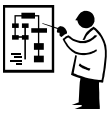
Step	Action
8	Click the **Add Button** button in the Toolbar widget dialog box 
9	Click the drop down menu under **Action** and select **Open Web Page**. Then give the value **Open Websphere** to the **Label** and the value "http://localhost:9060/admin" to the **URL**. 
10	Then click **OK** and validate that you see your newly added toolbar action.
11	Click **OK** at the bottom of the Toolbar dialog window to exit it.
12	Click the **Save button** and then the **Close button** at the top of the screen.
13	Click the **Save and Close button** on the solution to exit the solution editor.

Step	Action
14	Hover the mouse over the Credit Card Dispute HOL solution and click **Deploy**. Click the **Deploy** button on the confirmation dialog window. Wait for the green check mark to appear next to the solution.
15	Hover the mouse over the Credit Card Dispute HOL and click **Test** to open Case Client.
16	After Case Client opens, in the Search widget, enter **%** and click the **Search** button.
17	Highlight a case in the Case List widget and click the **Show Link to Case** button. Validate that you get a dialog with the direct link to the case by opening a new browser tab and copy and pasting the URL into the new tab.
18	Next, click on the button **Open Web Page** and validate that the **WebSphere Integrated Solutions Console** opens in a new browser tab.
19	Close the new browser tabs and the case client window.

Summary

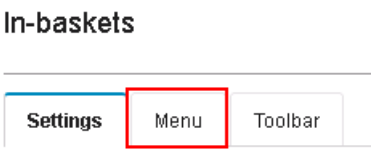
In this section you:

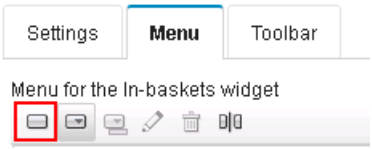
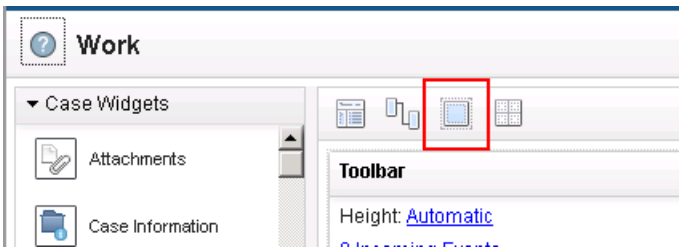
- Added a new toolbar action to open a web page

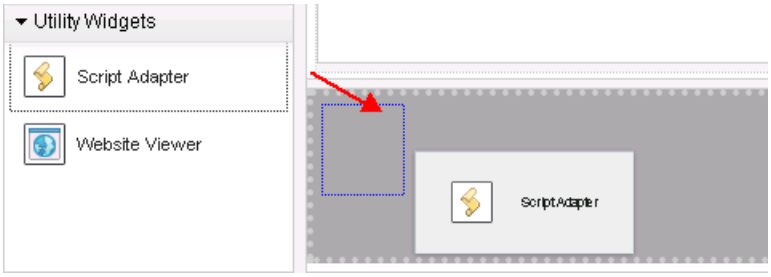


Exercise 3 – Event action to open multiple work items

In this exercise, we will use the script adapter and custom actions to open multiple work items with a single action. We can open multiple work items simultaneously in one action. This is one way to customize the script adapter widget with the in-basket widget.

Step	Action
1	Open Case Builder if it is not already open by navigating to the following URL: http://localhost:9081/CaseBuilder
2	Log in as **P8Admin** with the password **filenet** if necessary.
3	Hover your mouse over Credit Card Disputes HOL and select **Edit** to open the solution editor.
4	Navigate to the **Pages** tab by clicking on it.
5	Click **Solution Pages** to expand it, then click on **Work** to open Page Designer.
6	Click on the Settings icon of the In-baskets widget. 
7	Click the Menu tab in the In-baskets settings dialog window. 

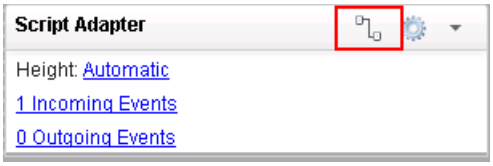
Step	Action
8	Click the Add Menu Item icon. 
9	Click the drop down menu for Action and then select **Event Action**.
10	There are several options that pop up after you select Event Action. For Label, enter **Open All**.
11	For Menu Identifier, enter **open_all**.
12	For Event_Name, enter **open_all_event**.
13	For Event Type, click the drop down and select **Broadcast**.
14	Scroll down and click the **OK** button.
15	Validate that your newly added Event Action has been added on the In-baskets settings dialog window.
16	Then, click the **OK** button at the bottom of the dialog window.
17	Now, click the Show or Hide hidden widgets button. Notice that a grey section appears on the bottom of the main layout area. 

Step	Action
18	Drag and drop the Script Adapter item from palette to the main layout area. 
19	Click on the Edit Settings icon on the Script Adapter widget. 

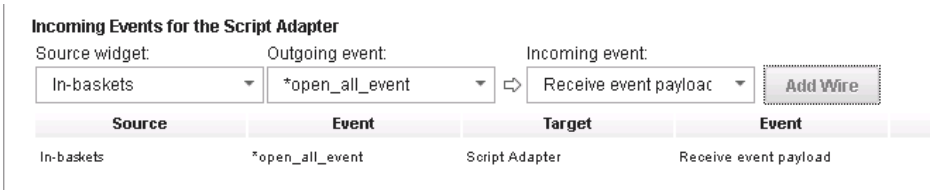
20	In the dialog window that opens, clear the text in the JavaScript text box. Then, copy and paste the following code into the Javascript text box. The script below allows us to select multiple work items and open them by iterating through the payload.
	`for (var i in payload.WorkItem){`
	`var w = payload.WorkItem[i];`
	`var h = new icm.util.WorkItemHandler(this, true);`
	`w.retrieveStep(function(workItem){`
	`h.handleWorkItem(workItem);`
	`});`
	`}`

21	Click the **OK** button at the bottom of the dialog window. Notice, that if you have any errors in the JavaScript, the OK button will not be enabled, and you should see an error message indicating the issue.

Step	Action
22	Click the Edit Wiring icon for the Script Adapter widget.



23	Underneath the Incoming Events, click the drop down and select **In-baskets** for the Source widget.
24	Click the drop down select ***open_all_event** for the Outgoing event.
25	Click the drop down and select **Receive event payload** for the Incoming event.
26	Click the **Add Wire** button.
27	Validate that you have the correct wiring as shown below.



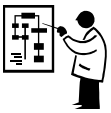
28	Click the **OK** button at the bottom of the Wire Events dialog window.
29	Click the **Save** button then the **Close** button to close Page Designer.
30	Click the **Save and Close** button to exit the solution editor.
31	Click Deploy on Credit Card Dispute HOL and click the Deploy button again to confirm.
32	Hover your mouse over Credit Card Dispute HOL and click **Test** to open Case Client.

Step	Action
33	Navigate to the **Work** tab.
34	We are going to make two cases to validate that we can open multiple work items with the new event action. Click on the **Add Case** button on the Cases page and create two new cases.
35	Switch to the **Work** tab. Then, switch to the **Customer Representative** role and click on the in-basket tab to refresh the in-basket widget to view your two newly created work items.
36	Click once on the first work item and then hold the shift key and click once on the second work item. Make sure not to click on the step name hyperlink or the work item details page will open instead.
37	Validate that both cases are highlighted then right click on the second work item and select **Open All**.
38	Validate that both work items are now open in separate tabs in Case Client.
39	Close the Case Client window.

Summary

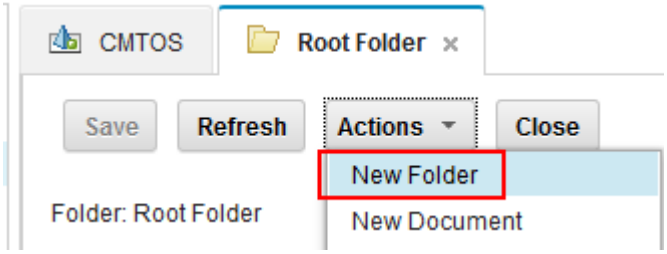
In this section you:

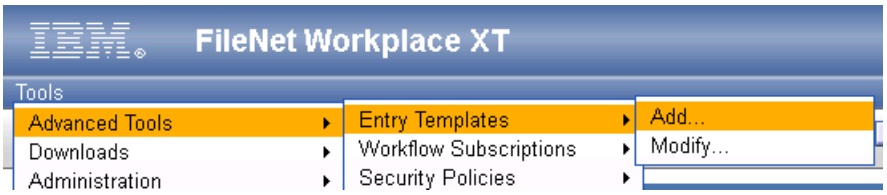
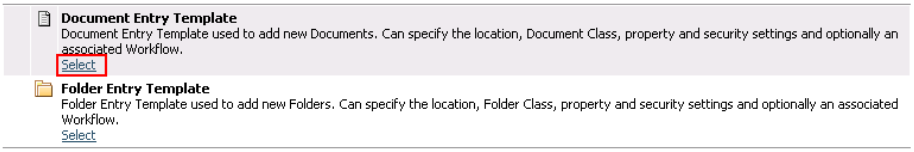
- created a script adapter customization to open multiple work items

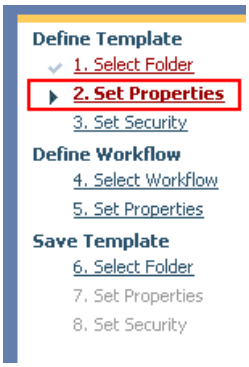
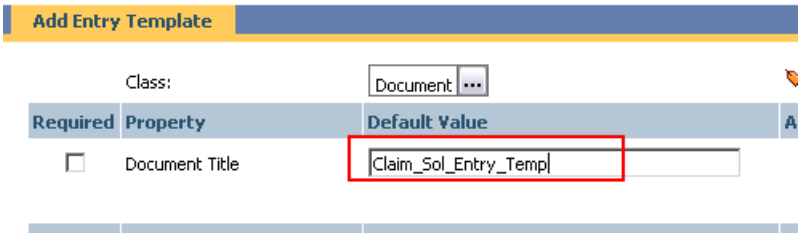
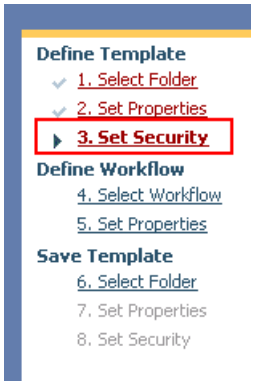


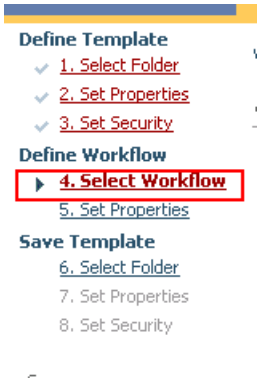
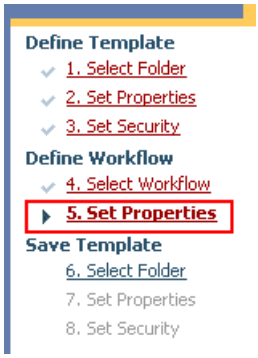
Exercise 4 – Creating a custom toolbar action for IBM Content Navigator action

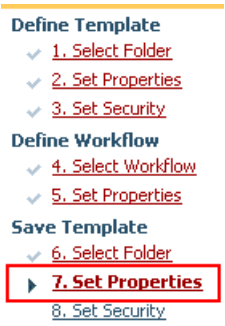
In this exercise, we will create a custom toolbar action to open an ICN action for an entry template. We are using WorkPlaceXT to create the entry template then we are adding the entry template version series id to our custom toolbar action to invoke the ICN action.

Step	Action
1	Open a new tab in Firefox and navigate to the IBM Administration Console for Content Platform Engine (ACCE). Log if necessary with **p8admin / filenet.** The URL is: http://localhost:9080/acce/ **Note:** There is link on the desktop.
2	Click on **CMTOS** under Object Stores.
3	Navigate to **Browse** then **Root Folder**. Click on Root Folder to open it. Click on **Actions** then select **New Folder**. 
4	Give the name **CC template assets** to Folder Name then click the **Next >** button.
5	On the Specify Settings for Retaining Objects window, click the **Next >** button.

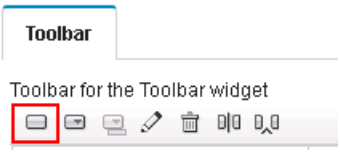
Step	Action
6	On the Summary window, click the **Finish** button.
7	Within Firefox, open a new browser tab and navigate to Workplace XT by entering the following URL: http://ecmdemo1.ecm.ibm.local:9080/WorkplaceXT If prompted, log in with **P8Admin** and the password **filenet**. **Note:** There is link on the desktop.
8	Click **Advanced Tools** under Tools, then **Entry Templates**, then **Add** to open the WorkplaceXT Entry Template Designer. 
9	Click **Select** under Document Entry Template. 
10	Click on **CMTOS** under Object Stores.
11	Click on **CC Template Assets** under Folders on the following window.
12	Validate that your path is Object Stores > CMTOS > CC Template Assets. Click on the **Next** button on the next dialog.

Step	Action
13	Note that you are on the Set Properties dialog window now.  Now, enter the value **Claim_Sol_Entry_Temp** for the default value for the Document Title. Leave the rest of the values as defaults. 
14	Scroll down the window and click the **Next** button.
15	Note that you are on the Set Security dialog window now.  We will leave the defaults on this screen. Scroll down and click the **Next** button.

Step	Action
16	Note that you are on the Select Workflow dialog window now.  We will leave the defaults on this screen. Click the **Next** button.
17	Note that you are on the Set Properties dialog window now.  We will leave the defaults on this screen. Click the **Next** button.
18	For the **Set Declare Records** step, we will leave the defaults on this screen. Click the **Next** button.
19	Note that you are on the Select Folder dialog window now. Click **CMTOS** underneath Object Stores.
20	Click on **CC Template Assets** under Folders on the following window.
21	Validate that your path is Object Stores > CMTOS > CC Template Assets. Click on the **Next** button on the next dialog.

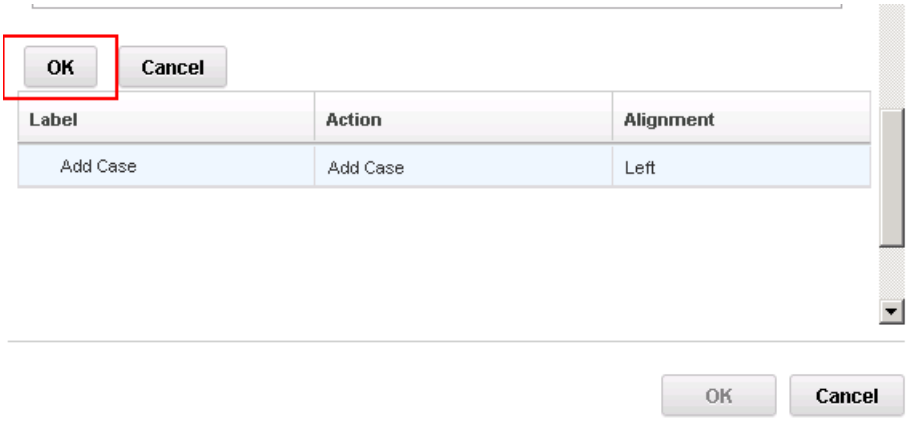
Step	Action
22	Note that you are on the Set Properties dialog window under Save Template now.  Now, enter the value **Claim_Sol_Entry_Temp** for the value for the Document Title. Leave the description blank. Click the **Next** button.
23	Click the **Finish** button on the Set Security dialog window.
24	Click the **OK** button on the Add Confirmation window.
25	Close the WorkplaceXT browser tab.
26	Open a new browser tab in Firefox and navigate to IBM Administrative Console for Content Engine by entering the following URL: http://localhost:9080/acce Log in as the user **P8Admin** with the password **filenet**.
27	Click on **CMTOS** underneath the Object Stores folder in the left navigation tree.
28	Click the **Browse** folder to expand it in the left navigation tree.
29	Click the **Root Folder** folder to expand it in the left navigation tree.
30	Click the **CC Template Assets** folder to open it.
31	Double click on **Claim_Sol_Entry_Temp.xml** under the column Containment Name to open the entry template.

Step	Action
32	Click on the **Properties** tab.
33	Click on Property Name to organize the rows alphabetically. Scroll down to the Version Series row and double click on the Property Value cell.
34	Copy to your clipboard the Version Series ID from the dialog that opens.
35	Open the NotePad++ application and make a new text document. Paste your Version Series ID into NotePad++.
36	Close the browser tab for IBM Administrative Console for Content Engine.
37	Open a new browser tab and navigate back to Case Builder by entering the following URL: http://localhost:9081/CaseBuilder If necessary, log in as **P8Admin** with the password **filenet**.
38	Hover your mouse over **Credit Card Disputes HOL** click **Edit.**
39	Click the **Pages** tab and click on **Solution Pages** to expand it.
40	Then, click on **Cases** to open Page Designer.
41	Click on the settings icon for the Toolbar widget. 

Step	Action
42	Click the Add Button icon. 
43	Click the drop down for Action and select **Script Action**.
44	Change the Label value to be **Add Entry Template**. 

Step	Action
45	Copy and paste the following code into the **Execute** text box. Leave the **Show this script action** and **Enable this script action** text boxes blank. This script allows you to open a dialog window to add an entry template that is invoked as an ICN action. The script below calls the Navigator action through ecm.model.desktop.getActionsHandler(lang.hitch(this, function(actionsHandler). We are able to display the entry template through the version series ID and the respository ID.

```
var entryTemplateId = "YOUR VERSION SERIES ID HERE";
var repositoryId = this.getWidget().getSolution().getTargetOS().id;
require([
  "dojo/_base/declare",
  "dojo/_base/lang"
  ], function(
    declare,
    lang
    ) {
      ecm.model.desktop.getActionsHandler(lang.hitch(this, function(actionsHandler) {
        var repository = ecm.model.desktop.getRepository(repositoryId);
        repository.retrieveItem(entryTemplateId, function(item) {
          if (item && item.mimetype) {
            switch (item.mimetype) {
              case "application/x-filenet-documententrytemplate":
              case "application/x-filenet-folderentrytemplate":
              case "application/x-filenet-entrytemplate":
              case "application/x-filenet-customobjectentrytemplate":
              case "application/x-filenet-declarerecordentrytemplate":
              actionsHandler.actionView(repository, [
                item
              ]);
              break;
            }
          }
          }, "EntryTemplate", "current", entryTemplateId);
        }));
      });
```

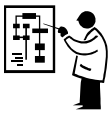
Step	Action
46	Navigate to NotePad++ and copy to the clipboard your Version Series ID.
47	Paste and replace the text **YOUR VERSION SERIES ID HERE** with your Version Series ID for the var **entryTemplateID** in the code you just pasted into the Execute textbox.
48	Scroll down and click the **OK** button. 
49	Note that your newly added Toolbar action now appears. Click the **OK** button to close the Toolbar dialog window.
50	Click the **Save** button. Then click the **Close** button.
51	Click the **Save and Close** button.
52	Hover your mouse over Claim Solution and click **Deploy**. Click the Deploy button on the Confirmation dialog.
53	Hover your mouse over Claim Solution and click **Test** to open Case Client.
54	Navigate to the Cases page and click the **Add Entry Template** button.

Step	Action
55	Validate that you get a dialog window that opens up. This is a customization of a Script Action to allow you to call the add entry template action in IBM Content Navigator.
56	Close the dialog window.
57	Close the Case Client window.

Summary

In this section you:

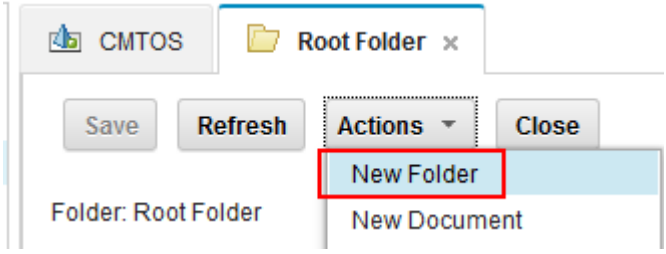
- created a custom toolbar action for ICN action

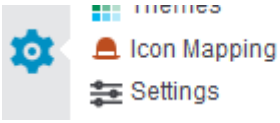
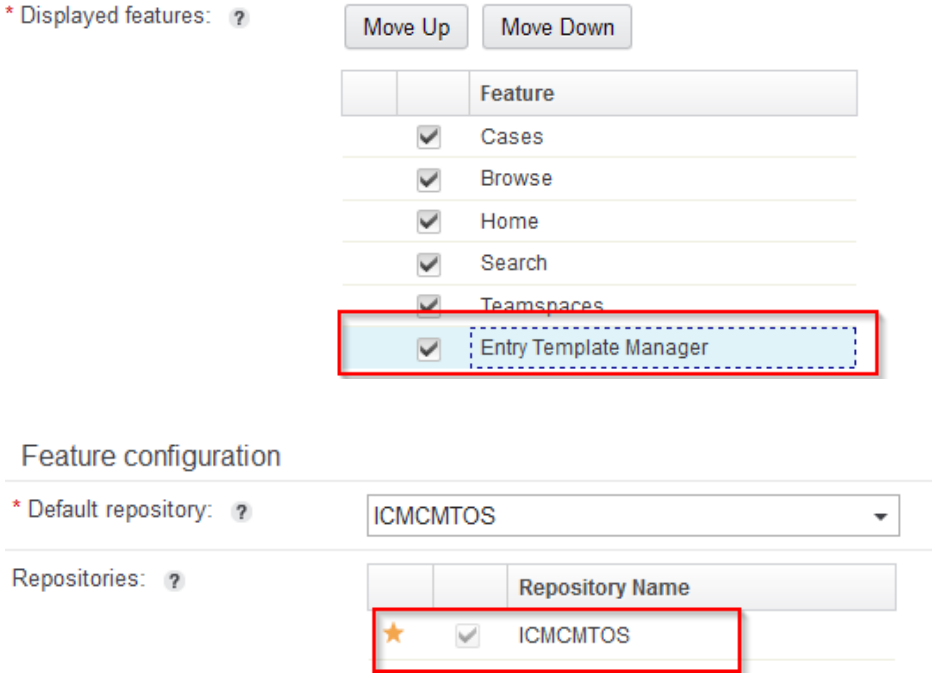


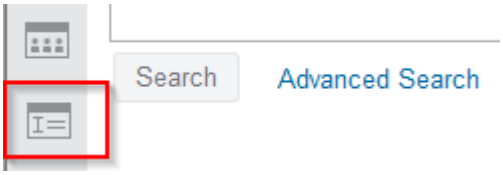
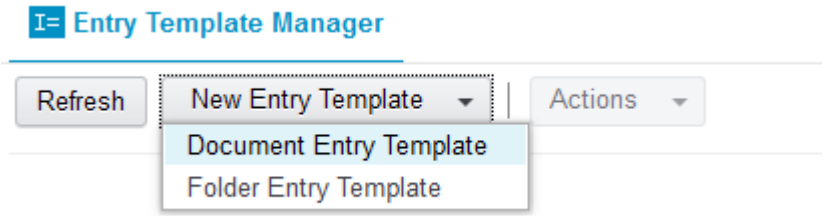
Exercise 5 – Creating a toolbar action for IBM Content Navigator action – ICN Entry Template

In this exercise, we will create a toolbar action to use an ICN entry template. Content Navigator 2.0.3 adds support for entry templates. We are using the IBM Content Navigator to create the entry template, and add the entry template version series id to our toolbar action to invoke the ICN entry template to add a document to a case.

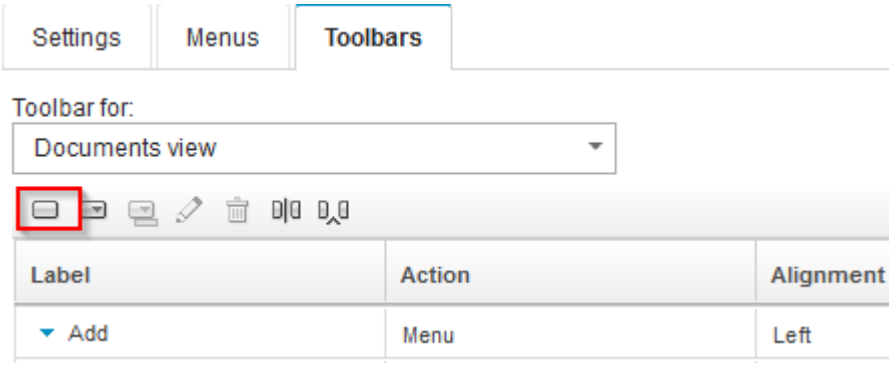
Step	Action
1	Open Firefox and navigate to the IBM Administration Console for Content Platform Engine (ACCE). Log if necessary with **p8admin / filenet.** The URL is: http://localhost:9080/acce/ **Note:** There is link on the desktop.
2	Click on **Global Configuration > Data Design > Add-ons.**

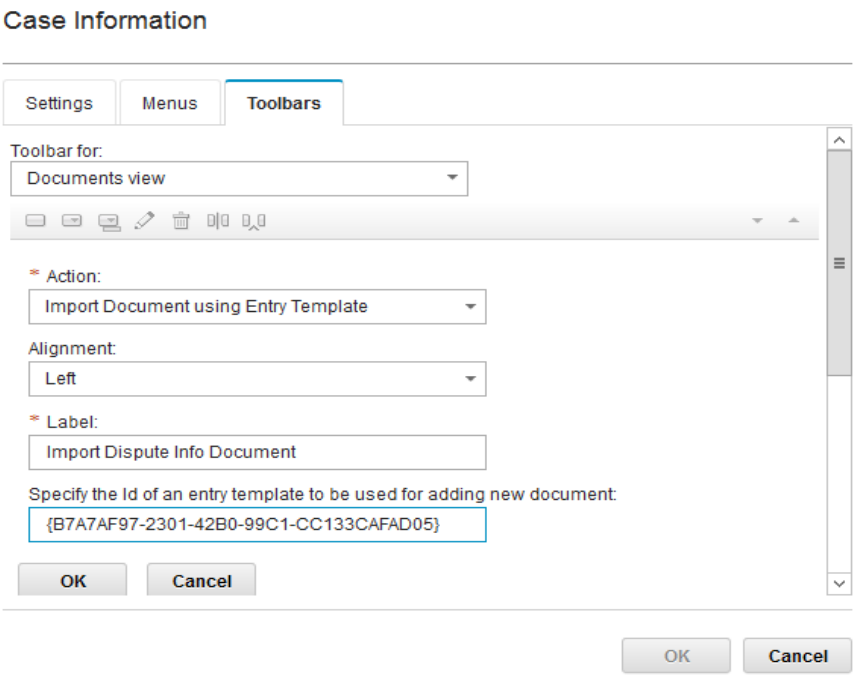
Step	Action
3	Scroll to the bottom and you will see an entry for the IBM Content Navigator 2.0.3 Entry Template Extensions. These extensions must be installed in order to use the new ICN Entry Templates.  Close the Add-ons tab.
4	Click on **CMTOS** under Object Stores.
5	Navigate to **Browse** then **Root Folder**. Click on Root Folder to open it. Click on **Actions** then select **New Folder**. 
6	Give the name **ICN template assets** to Folder Name then click the **Next** button.
7	On the **Specify Settings for Retaining Objects** window, click the **Next** button.
8	On the Summary window, click the **Finish** button.
9	Within Firefox, open a new browser tab and navigate to IBM Content Navigator by entering the following URL: http://ecmdemo1.ecm.ibm.local:9080/navigator/?desktop=ECM If prompted, log in with **P8Admin** and the password **filenet**. **Note:** There is link on the desktop.

Step	Action
10	Open the **Content Navigator admin page**, click on **Repositories**, and edit the ICMCMTOS repository. Connect using p8admin and filenet as the id and password. Under the **Configuration Parameters** tab, scroll to the bottom,and make sure that the entry template management is  enabled. (You can also administer the entry template roles in this section of the page.)
11	Close the ICMCMTOS and the Repositories tabs, highlight the **Case Manager desktop** entry under the Desktop tab, and click the **Edit** bottom.
12	In the **Layout** tab, make sure that the Entry Template Manager display feature is checked and the ICMCMTOS repository is entered. 

Step	Action
13	Close the Content Navigator, and open the Case Client in a browser. The is a shortcut on the desktop. Log on with p8admin and filenet as the id and password.
14	Click on the Entry Template View icon on the left of the page. 
15	Click on the New Entry Template drop down and select Document Entry Template. 
16	Enter **Dispute_Info_Entry_Temp** into the Name property.
17	Save in **ICMCMTOS > ICN template assets**.
18	Under **Set the Item Properties**, make sure **Document Class** is **Document**. (This can also be a document type defined for your solutions. For this exercise, we will use the Document class.)
19	Review the remainder of the page, but do not make any further changes. Click the **Save and Close** button. Log out of the Case Client and close the browser.

Step	Action
20	Open a new browser tab in Firefox and navigate to IBM Administrative Console for Content Engine by entering the following URL: http://localhost:9080/acce The is a shortcut on the desktop. Log in as the user p**8admin** with the password **filenet**.
21	Click on **CMTOS** underneath the Object Stores folder in the left navigation tree.
22	Click the **Browse** folder to expand it in the left navigation tree.
23	Click the **Root Folder** folder to expand it in the left navigation tree.
24	Click the **ICN template assets** folder to open it.
25	Double click on **Dispute_Info_Entry_Temp.xml** under the column **Containment Name** to open the entry template.
26	Click on the **Properties** tab.
27	Click on Property Name to organize the rows alphabetically. Scroll down to the Version Series row and double click on the Property Value cell.
28	Copy to your clipboard the Version Series ID from the dialog that opens.
29	Open the NotePad++ application and make a new text document. Paste your Version Series ID into NotePad++.
30	Close the browser tab for IBM Administrative Console for Content Engine.
31	Open a new browser tab and navigate back to Case Builder by entering the following URL: http://localhost:9081/CaseBuilder If necessary, log in as **P8Admin** with the password **filenet**.
32	Hover your mouse over **Credit Card Disputes HOL** click **Edit.**

Step	Action
33	Click the **Pages** tab and click on **Case Details Pages** to expand it.
34	Then, click on **Case Details Pages** to open Page Designer.
35	Click on the **Settings** icon for the **Case Information** widget. 
36	Click the Add Button icon in the Toolbars tab. 
37	Click the drop down for Action and select **Import Document using Entry Template**.

Step	Action
38	Change the Label value to be **Import Dispute Info Document**  Add the Version Series ID. Click OK. Click OK again.
39	Click the **Save** button. Then click the **Close** button.
40	Click the **Save and Close** button.
41	Hover your mouse over Claim Solution and click **Deploy**. Click the Deploy button on the Confirmation dialog.
42	Hover your mouse over Claim Solution and click **Test** to open Case Client.
43	Navigate to the Cases page, put a "%" in the search field, and list the cases. Select a case, and in the Case Detail page, fine the Import Dispute Info Document button in the Case Information widget. Click on the button.
44	Validate that you get a dialog window that opens up.
45	Click on the Browse button and find a document. Select the document, and click the open button.

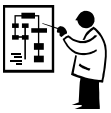
Step	Action
46	Leave the rest of the setting, and click Add in the lower right corner of the page. The document is now imported.
47	Close the Case Client window.
48	In the Case Builder, hover your mouse over **Credit Card Disputes HOL** click **Edit.**
49	Click the **Pages** tab and click on **Case Details Pages** to expand it.
50	Then, click on **Case Details Pages** to open Page Designer.
51	Click on the **Settings** icon for the **Case Information** widget. 
52	Click the Toolbars tab and highlight the Import Dispute Info Document toolbar, and click on the Edit icon.
53	Remove the Version Series ID, and click OK. Click OK again.
54	Click the **Save** button. Then click the **Close** button.
55	Click the **Save and Close** button.
56	Hover your mouse over Claim Solution and click **Deploy**. Click the Deploy button on the Confirmation dialog.
57	Hover your mouse over Claim Solution and click **Test** to open Case Client.
58	Navigate to the Cases page, put a "%" in the search field, and list the cases. Select a case, and in the Case Detail page, fine the Import Dispute Info Document button in the Case Information widget. Click on the button.

Step	Action
59	Validate that you get a dialog window that opens up. Notice that you need to select the entry template from a choice list. Select the Dispute_Info_Entry_Temp template.
60	Browse to a document and click open. Click add to add the document.
47	Close the Case Client window.

Summary

In this section you:

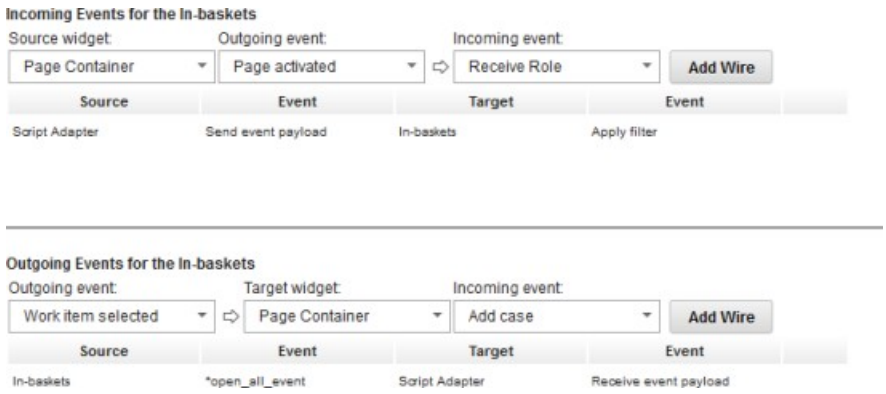
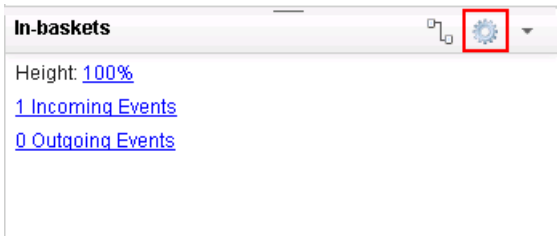
- created a toolbar action that uses an IBM Content Navigator Entry Template.



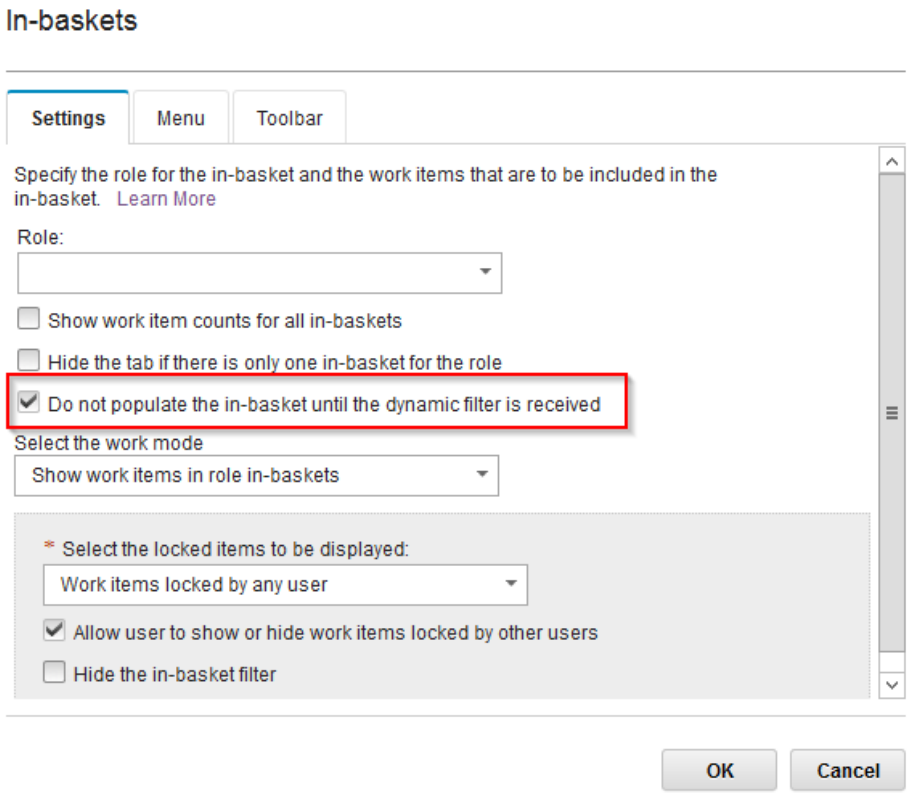
Exercise 6 – Adding an in-basket dynamic filter

In this exercise, we will add an in-basket dynamic filter and show how we can edit the settings of the out of the box in-basket widget to populate the in-basket when the filter is received. We are filtering by a case property that we make and adding the in-basket dynamic filter to a custom page.

Step	Action
1	Open Case Builder if it is not open already. Click **Edit** on the solution Credit Card Dispute HOL using the user p8admin.
2	Click on the **Pages** tab.
3	Click on **Work** under Solution Pages in the Pages tab of Case Builder.
4	Click the **Show or Hide Hidden Widgets icon** to show the Script Adapter widget.
5	Drag and drop the out of the box script adapter into the hidden widget area.
6	Click the **Edit Wiring icon** on the Script Adapter widget. 
7	Under the Script Adapter Incoming Events section, select: 1. **Page Container** as Source widget 2. **Page Activated** as Outgoing event 3. **Receive event payload** as Incoming event Then, click the **Add Wire button**.
8	Under the Script Adapter Outgoing Events section, select:

Step	Action
	1. **Send event payload** as Outgoing Event 2. **In-baskets** as Target widget 3. **Apply filter** as Incoming event Then, click the **Add Wire button**.
9	Click the **OK button** at the bottom to exit the Wire Events window for Script Adapter.
10	Click the **Edit Wiring** icon for the In-basket widget.
11	Validate that the wiring is set for the incoming event:  Then, click **OK** to exit the edit wiring window for in-basket. You may want to clear any existing event wiring that you have in the in-basket event wiring window here to avoid confusion and mismatching event wirings.
12	Click the **Edit Settings** icon for the In-basket widget. 

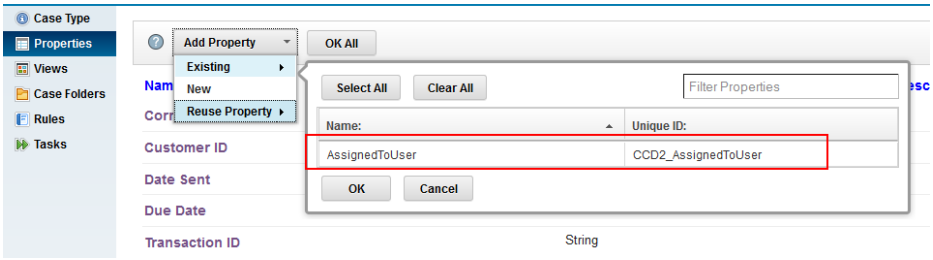
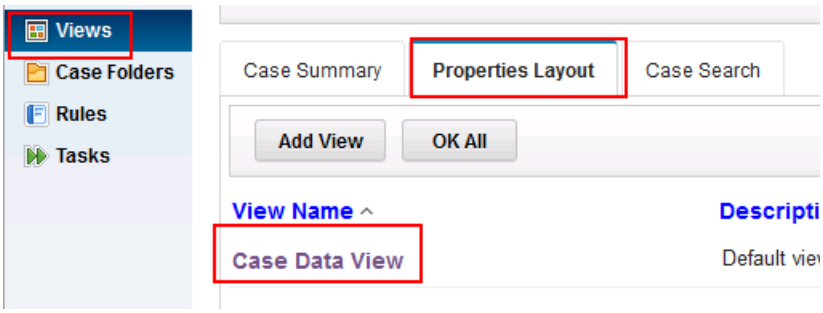
Step	Action
13	Check the box labeled **Do not populate the in-basket until the dynamic filter is received**



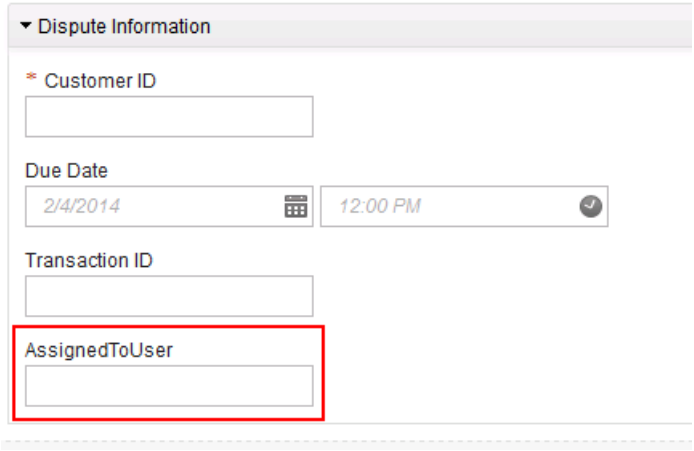
14	Click the **OK button** to exit the edit settings dialog for the in-basket widget.
15	Click the **Edit Settings icon** on the Script Adapter widget.

Step	Action
16	Clear the existing text in the JavaScript text box. Then, paste in the following code into the text box under the JavaScript label. The following script grabs the current username and constructs variables to pass to the icm.model.InbasketDynamicFilter.fromJSON(data); function to perform the dynamic filter.

```
var myUser = ecm.model.desktop.userDisplayName;
var data = {
        "queueName":"CCD2_CustomerServiceRep",
        "inbasketName":"CSR Work",
        "hideFilterUI":false,
        "queryFilter":"(CCD2_AssignedToUser = :A)",
        "queryFields":[
        {
        "name":"CCD2_AssignedToUser",
        "type":"xs:string",
        "value":"*"
        }
        ],
        "hideLockedByOther":"true"
};
data.queryFields[0].value = myUser;
var model = icm.model.InbasketDynamicFilter.fromJSON(data);
console.log(model);
var modelArray = [];
modelArray.push(model);
return {"dynamicFilters":modelArray};
```

Step	Action
17	Click the **OK button** to exit the Script Adapter window.
18	Click the **Save button** and then the **Close button** at the top of the Page Designer window.
19	Click the **Properties** tab and click the **Add Property** drop down button, then click **New**.
20	Set the **Name** of the new property to **AssignedToUser** and do not change the other fields.
21	Click the **OK button** to add the new property.
22	Click the **Case Types** tab and then click **Manage Dispute**.
23	Add AssignToUser property to the case type properties: 
24	Click the OK button on the right.
25	Click **Views** and then click the Properties Layout tab then click on **Case Data View**. 
26	Drag and drop the AssignedToUser property into the Dispute

Step	Action
	Information container.



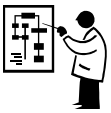
27	Click the **Save** button and then the **Close** button.
28	Click on **Back** button.
29	Click on In-basket tab,and open the **CSR Work** in-basket.
30	Add the **AssignedToUser** property to the **CSR Work** in-basket and click the **OK** button.
33	Click the **Save and Close** button to exit the editor of the solution.
34	Hover the mouse over the Credit Card Dispute HOL Solution and click **Deploy**.
35	Click the **Deploy** button again for the Confirmation window. Then wait for the green check mark next to the Credit Card Dispute HOL.
36	Hover the mouse over the Credit Card Disputes HOL solution and click **Test** to open Case Client.
37	Go to the **Work** tab in Case Client.
38	Click on the **Add Case** drop down and select **Manage Dispute**.
39	Assign the value **P8Admin** to AssignedToUser. This property is case sensitive so be mindful to type P8Admin as it appears.

Step	Action
40	Add the rest of the values for the new case.
41	Click the **Add** button.
42	Click on the CSR Work tab for the in-basket to refresh the work queue to show your newly created case.
43	Click on the Manage Roles button and add "**Paula Small**" to the Customer Service Representative role. We will be logging as Paula Small or psmall in the upcoming steps.
44	Close the Case Client window.
45	Click on your username **P8Admin** in the top right of Case Builder and click **Log Off**. Then close the browser and re-open the browser.
46	Log into Case Builder as **psmall** with the password **filenet**.
47	Go to the **Work** tab in Case Client. Notice how your in-basket for Paula Small looks like before you add a new case.
48	Click on the **Add Case** drop down and select **Manage Dispute**.
49	Assign the value **Paula Small** to AssignedToUser. This property is case sensitive so be mindful to type **Paula Small** as it appears.
50	Fill the rest of the values in the case.
51	Click the **Add** button.
52	Click on the **CSR Work** tab to refresh the work queue to show your newly created case.
53	Validate that your newly created work item appears in the in-basket widget. We can now see the in-basket filter works to show the work items that are declared to each user in the case property AssignedToUser.
54	Close the Case Client window.

Summary

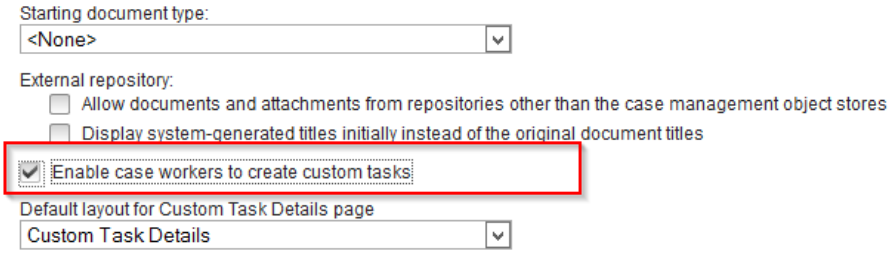
In this section you:

- Created a dynamic in-basket filter

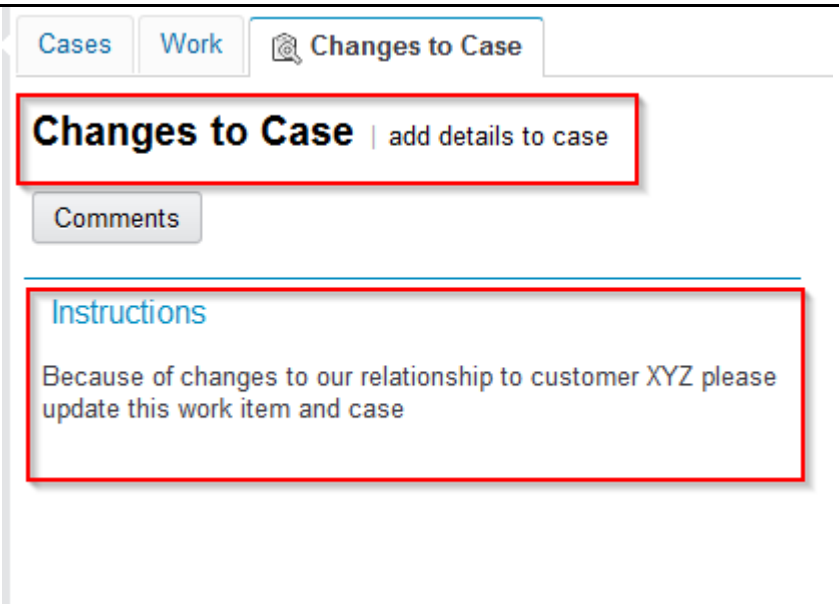


Exercise 7 – Instruction widget

In this exercise, we will interact with the Instruction Widget. The Instruction Widget allows us to send instructions to specific work items and create a custom task. This is one of the new out of the box widgets in IBM Case Manager 5.2.1.

Step	Action
1	Logon to the Case Builder using the user **p8admin** if it is not open already. Click **Edit** on the Auto Claims HOL Solution. Make sure to log off of psmall from the previous exercise.
2	Navigate to the **Case Types tab** and click on your case type.
3	Check the box labeled **Enable case workers to create custom tasks**.  This will enable us to set custom tasks to set for the new Instruction widget
4	Click **Save and Close button** at the top of the screen
5	Click **Deploy** on the solution and click the **Deploy** button again on the confirmation dialog window. Make sure you check the box labeled **Commit my changes and make them available for deployment**. Wait for the green check mark on the Auto Claims HOL Solution to show deploy was finished.
6	Hover your mouse over the Auto Claims HOL Solution and click **Test** to open Case Client.
7	If p8admin is not assigned to the roles for this solution, click on the Auto Claims HOL Solution link on the upper right of the page, and

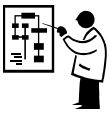
Step	Action
	click on Manage Roles. Add p8admin to each role (Agent, Adjuster, CSR). Select the CSR as the role.
8	In the Search widget, select Case Identifier, enter % , and click the **Search button** to pull up your case in the Case List widget below. If there are no cases, Click the add case button, and select the General Claims case type. Add a case.
9	On the **Cases** page, click on a case that you just created. This will bring up the cases detail page.
10	Click on the **Add Custom Task** button, then select **New**
11	You are now in the custom task editor. Please enter **add details to case** for the name and **please add details to this case for the customer XYZ** for the description In the work item section, please click **Insert an item** drop-down menu and select **Work Item**. Then enter the values: 1. **Changes to Case** for the title 2. **Because of changes to our relationship to customer XYZ please update this work item and case** for the instructions 3. select **Customer Service Representative** for the role.
12	Click the **Validate button**, then the **Save button**, and then the **Start button** at the top of the Custom Task Editor. If prompted to confirm, click the **Yes button**.
13	Navigate to the **Work** tab to open the Work page.
14	Click on the 2nd work item in the list  You may need to refresh the in-basket or click the Reset button on the In-basket widget to get this latest work item.

Step	Action
15	 Validate that the Instruction widget displays the text entered in the custom task editor in the steps earlier.
16	Click the **Close button** at the top right.
17	Close the Case Client window.

Summary

In this section you:

- Interacted with the Instruction widget

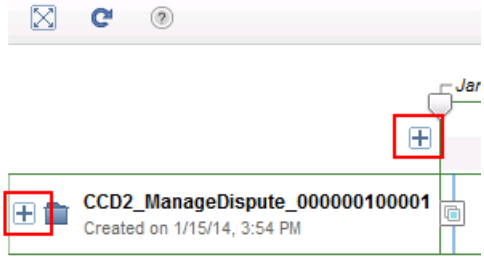


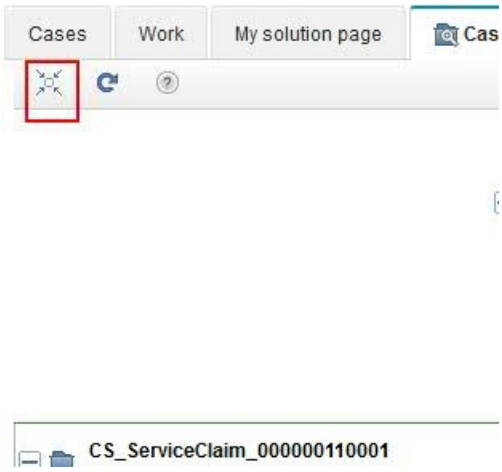
Exercise 8– Timeline Visualizer widget

In this exercise, we will interact with the Timeline Visualizer widget. The Timeline Visualizer widget allows us to view changes or actions that were done within a case. It shows us a breakdown of the case's history over time and requires some auditing settings and a case history store to be created. This is one of the new out of the box widgets in IBM Case Manager 5.2.1.

Step	Action
1	In your existing or a new Firefox session, navigate to the following URL to open the IBM Case Manager Administration Client: http://localhost:9080/navigator/?desktop=icmadmin If you need to log in, Note: There is a link to in the **Programs** folder, on the desktop.
2	Click on **CMDOS** under Object Stores in the left navigation tree.
3	Click on the **Solutions** folder to open it on the right of the screen.
4	Right click on **Credit Card Disputes HOL** and select Actions. Hover over the option **Manage** and click on **Configure Auditing**.
5	On the Create or edit an audit configuration screen, select **Create an audit configuration** in the **Options** section.
6	Click the **Next** button.
7	Enter **CCDM_HOL_solution_audit_manifest** as the Audit manifest name.
8	Click the **Next** button.
9	On the Add Properties to audit screen, click the **Add** button.
10	On the Select Properties screen, Select the properties, **Customer ID**, **Due Date**, **Transaction ID** and **Date Sent**.
11	Click the **addition icon** to add it to the selected properties icon.

Step	Action
12	Click the **OK** button to exit the Select Properties screen.
13	Click the **Next** button.
14	Check the box labeled **Apply audit configuration** on the Apply audit configuration screen.
15	Click the **Save button** then the **Apply** button.
16	Wait for the Success screen to come up. Then click the **Close** button.
17	Navigate to Case Builder by following the URL: http://localhost:9080/CaseBuilder
18	Hover your mouse over **Credit Card Disputes HOL** solution and click Test.
19	Navigate to the **Cases** page and click **Add Case** and select **Manage Dispute**.
20	Set **Customer ID** to **123-222 and Transaction ID** to **T2.** Then click the **Add button** to add the case.
21	Enter **%** into the Search Widget and click the **Search button** to retrieve all of the cases. Click the case you just created.
22	Notice that the Timeline Visualizer widget appears on the bottom of the Case details page. We want to start populating it with data by adding changes to the case. Change the **Customer ID** field to **123-333**. Then click the **Save** button.
23	Change the **Transaction ID** to **T3** and click the **Save button**.
24	Click the **Add Task** button to add a new **Case Review Request** task.
25	Navigate back to the **Cases** tab and select your newly created case.

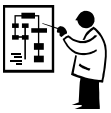
Step	Action
26	Wait for 3-5 minutes for the Timeline Visualizer widget to update itself. Click the Refresh icon to force refresh the Timeline Visualizer widget. 
27	Click the maximize icon on the Timeline Visualizer widget. 
28	Click the expand icon next to the case id and click the second expand icon near the date. 
29	Validate that you can see the tasks underneath the case id in the Timeline Visualizer widget when you click the expand icons.
30	Validate that you can see the case was modified on the timeline.  You may hover your mouse over these icons and expand to see details.

Step	Action
31	Click on the minimize icon to minimize the Timeline Visualizer widget. 
32	Close the Case Client page.

Summary

In this section you:

- interacted with the Timeline Visualizer widget



Do It Yourself Exercise 1 – Display case properties with API call

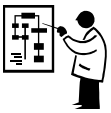
In this exercise, we continue what we did in exercise 1 of this hands on lab. You may have noticed that we are using an API call called this.getActionContext("CaseReference") to display case properties.

Following what you did in exercise one, output another element in the array from this.getActionContext("CaseReference") and replace the if statement in the code to check on another element. Use the script action under menu action for the Case list widget. As a reminder, in exercise 1, we only output the first element of the array.

Summary

In this section you:

- created a script using the script action in the Case list widget
- checked on other case properties using an API call



Do It Yourself Exercise 2 – Enumerate documents

In this exercise, we will add a way to enumerate the number of documents attached to a case by using a script adapter and wiring it to the Case List on the Cases page.

We want the user to select a case in the Case List widget and for a pop up to show the number of documents and to show the document id of each document in the root folder of the case. We want to use a script that will get the case folder ContentItem from the case editable object that is passed in the payload.

The script looks like this (make sure to fill your implementation where it says DOC TITLE HERE and DOC ID HERE). The script below gets the payload's case editable model objects and calls the Navigator function ecm.model.desktop.getActionsHandler function for case folder to retrieve the document ID and items.

```
var caseEditable = payload.caseEditable;
var caseObj = caseEditable.getCase();
var caseFolder = caseObj.caseFolder;
var actionsHandler = ecm.model.desktop.getActionsHandler();
if (actionsHandler) {
        actionsHandler.actionOpen(caseFolder,  function(caseFolder, resultSet) {
    alert("The selected case folder has " + resultSet.items.length + " items.");
            for (var i = 0 ; i < resultSet.items.length; i ++) {
                console.log("Document ID :  " + DOC ID HERE + "\n" + "Document Title: " + DOC TITLE HERE);
        alert("Document ID :  " + DOC ID HERE + "\n" + "Document Title: " + DOC TITLE HERE );
            }
        });
}
return payload;
```

After adding the script to the script adapter, add a few documents to a case and validate that you see the pop up window that enumerates the documents.

Summary

In this section you:

- created a script to enumerate the documents in a case
- added the script to the cases page and validated the pop up

Additional eLearning Resources

- IBM Case Manager V5.2.1 Knowledge Center – Designing the case management client application topic
  http://www-01.ibm.com/support/knowledgecenter/SSCTJ4_5.2.1/com.ibm.casemgmt.development.doc/acmdv000.htm
- Selected sessions from IBM Case Manager V5.2 Product Implementation and Maintenance Training (PIT / PMT) (220246):

  03-ICM 5.2 Custom Tasks PIT PMT (18 minutes)

  11-ICM 5.2 Timeline Visualizer PIT PMT (1 hour)

  14-ICM 5.2 Event Wiring Examples-Debugging Tips PIT PMT (36 minutes)

  16-ICM 5.2 Building a Custom Action PIT PMT (40 minutes)

Troubleshooting

Q: What is the solution to do it yourself exercise #1?
A: Using the same script in exercise 1 in this lab, change the text "CHANGEME" in this if statement if(c == x[CHANGEME].getCaseTitle()) to a number other than 0. Notice that a different element in the array is given based on the number.

Q: What is the solution to do it yourself exercise #2?
A: Here are the items that you should fill in based on the script in the do it yourself exercise #2.

```
var caseEditable = payload.caseEditable;
var caseObj = caseEditable.getCase();
var caseFolder = caseObj.caseFolder;
var actionsHandler = ecm.model.desktop.getActionsHandler();
if (actionsHandler) {
        actionsHandler.actionOpen(caseFolder,  function(caseFolder, resultSet) {
    alert("The selected case folder has " + resultSet.items.length + " items.");
            for (var i = 0 ; i < resultSet.items.length; i ++) {
                console.log("Document ID :  " + resultSet.items[i].id + "\n" + "Document Title: " + resultSet.items[i
].name);
        alert("Document ID :  " + resultSet.items[i].id + "\n" + "Document Title: " + resultSet.items[i].name);
            }
        });
}
return payload;
```