

# IBM Case Manager: New Features in ICM 5.2.1 - Lab

## Create the Solution

For this exercise you will create a new solution: Retail Banking Solution.

### *Overview of the Retail Banking Solution*

#### **Scenario**

A person goes into a Bank Branch Office and asks the Teller to open a New Bank Account. The Teller refers the customer to the New Accounts Desk, where the Customer Service Representative (CSR) works with new customer to create an account. The CSR gets the person's

- First Name
- Last Name
- SSN
- Address
- City
- State
- Country
- Date of Birth
- Gender

The CSR then asks the customer to complete or provide the following documents:

- The New Account Application Form
- A recent photo
- A signature card
- A proof of address (Driver's License or Passport)

The documents are verified.

The new customer then asks the CSR for a debit card to use with the new account. The CSR creates a debit card request. This task will send a request to create a debit card.

#### **Create a New Solution**

- Open Case Builder and log on using P8Admin/filenet.
- Click on Add Solution, and create a new solution as follows:

**Add a solution**


---

Define a unique identity for this solution. The prefix helps to uniquely identify documents that belong to cases in this solution.

\* Name:

\* Solution prefix:

Description:

Solution icon:  


---

- Fill in the following properties: Name – Retail Banking Solution, Prefix – RB, Description –Retail Banking Solution
- Click OK.

## ***Add Case Properties***

- Click on the Properties tab, then Add Property, and New

Create the following case properties in the solution as New (not Reused). Click OK after adding each one.

- LastName - String
- Sex - String
- Date of Birth - DateTime
- Address - String

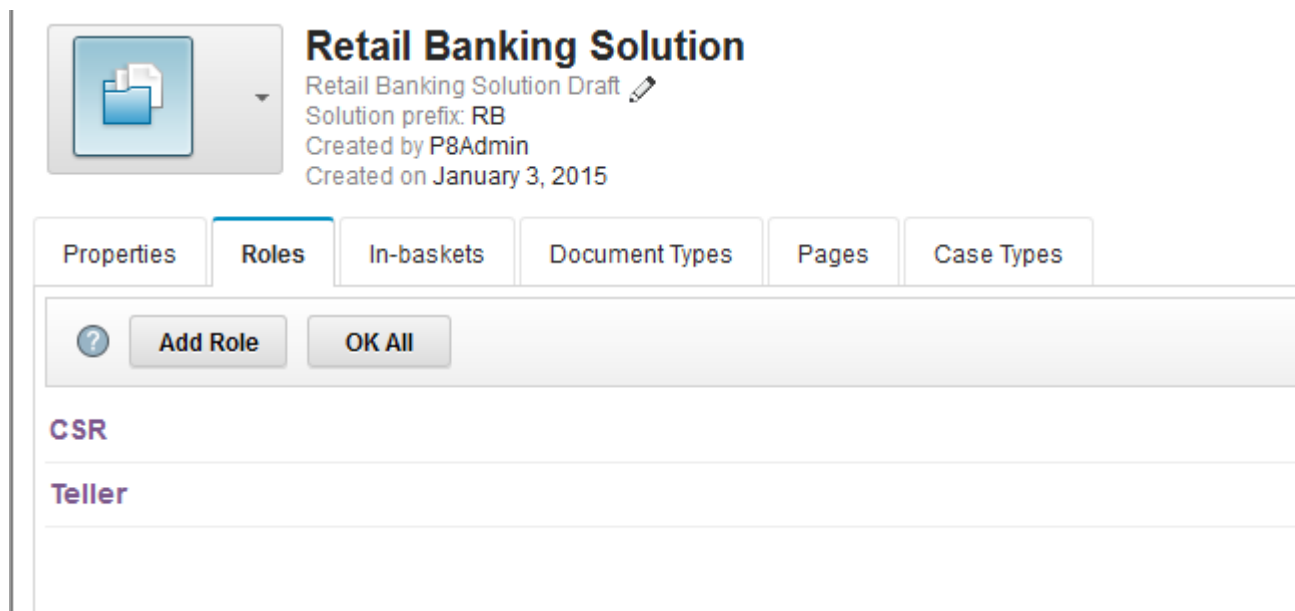
- City - String
- State - String
- Country - String
- SSN - String
- DepositAmount – Float

Click OK All. The resulting properties should look like this:

| Properties Roles In-baskets Document Types Pages Case Types |          |               |
|---|----------|---------------|
| <div> <span>?</span> Add Property OK All </div>             |          |               |
| Name ^  | Type     | Description   |
| Address   | String   |               |
| City  | String   | City          |
| Country   | String   | Country       |
| Date of Birth   | DateTime | Date of Birth |
| DepositAmount   | Float    | DepositAmount |
| FirstName   | String   | FirstName     |
| LastName  | String   | LastName      |
| Sex   | String   | Sex           |
| SSN   | String   | SSN           |
| State   | String   | State         |

## Add Roles

- Click on the Roles tab. Create the following roles. Use the Default values.



**Retail Banking Solution**  
Retail Banking Solution Draft ✎  
Solution prefix: RB  
Created by P8Admin  
Created on January 3, 2015

Properties Roles In-baskets Document Types Pages Case Types

? Add Role OK All

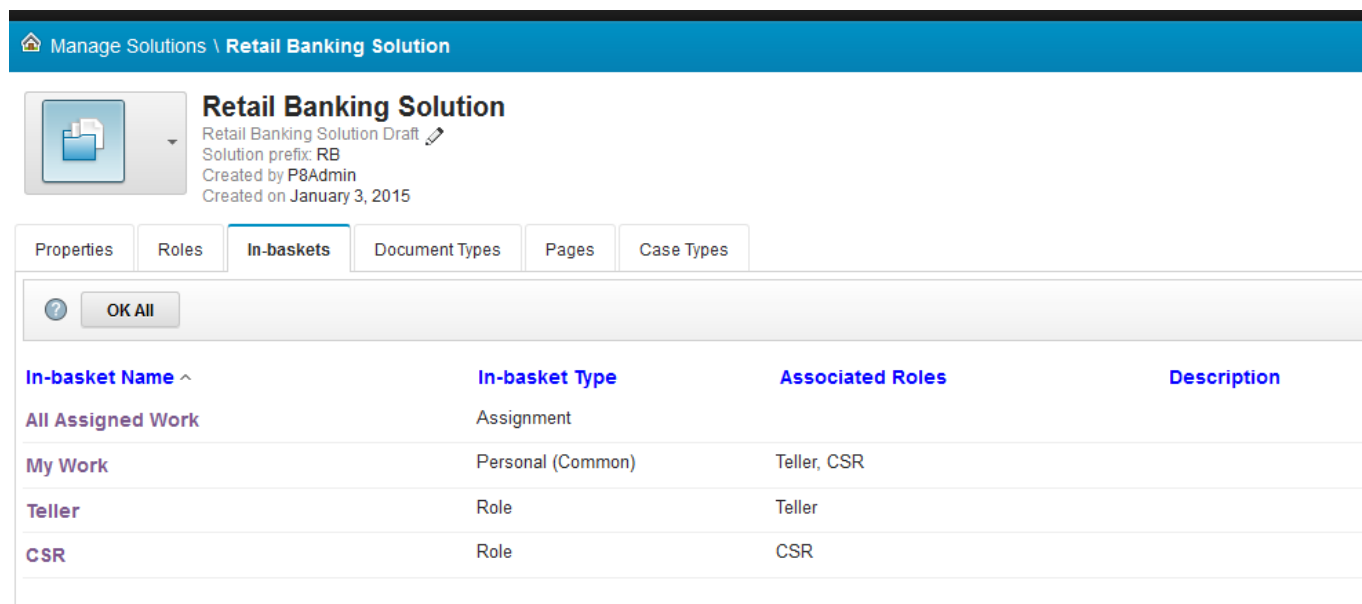
CSR

Teller

- Click “OK All”

## Check In-baskets

- Click on the In-baskets tab
- Notice that the associated roles have corresponding In-baskets configured.



Manage Solutions \ Retail Banking Solution

**Retail Banking Solution**  
Retail Banking Solution Draft ✎  
Solution prefix: RB  
Created by P8Admin  
Created on January 3, 2015

Properties Roles In-baskets Document Types Pages Case Types

? OK All

| In-basket Name ^  | In-basket Type    | Associated Roles | Description |
|-------------------|-------------------|------------------|-------------|
| All Assigned Work | Assignment        |                  |             |
| My Work           | Personal (Common) | Teller, CSR      |             |
| Teller            | Role              | Teller           |             |
| CSR               | Role              | CSR              |             |

- Click on the CSR In-basket and select the following properties in the in-basket columns

| Name:         | Unique ID:       |
|---------------|------------------|
| Address       | RB_Address       |
| Assigned To   | F_BoundUser      |
| City          | RB_City          |
| Country       | RB_Country       |
| Date of Birth | RB_DateofBirth   |
| DepositAmount | RB_DepositAmount |
| FirstName     | RB_FirstName     |
| LastName      | RB_LastName      |

- Rearrange the columns: FirstName, LastName, DepositAmount and Country should be after the Subject

| Name          | Sortable                 |
|---------------|--------------------------|
| Step Name     | <input type="checkbox"/> |
| Time Created  | <input type="checkbox"/> |
| Subject       | <input type="checkbox"/> |
| FirstName     | <input type="checkbox"/> |
| LastName      | <input type="checkbox"/> |
| DepositAmount | <input type="checkbox"/> |
| Country       | <input type="checkbox"/> |

## Create Document Types

- Click on the Document Types tab. Create the following Document Types.
- Fill in the document type name and Click OK.

Created by P8Admin  
Created on October 14, 2014

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

No properties are defined.

## Create Case Type

- Click on the Case Type tab. Create the following Case Type by clicking on Add Case Type and entering the details as shown below:

\* Case type name:  
Savings Account

\* Case type unique identifier:  
RB\_ SavingsAccount

Case type description:

Starting document type:  
AccountApplication  ☐ Map document

External repository:

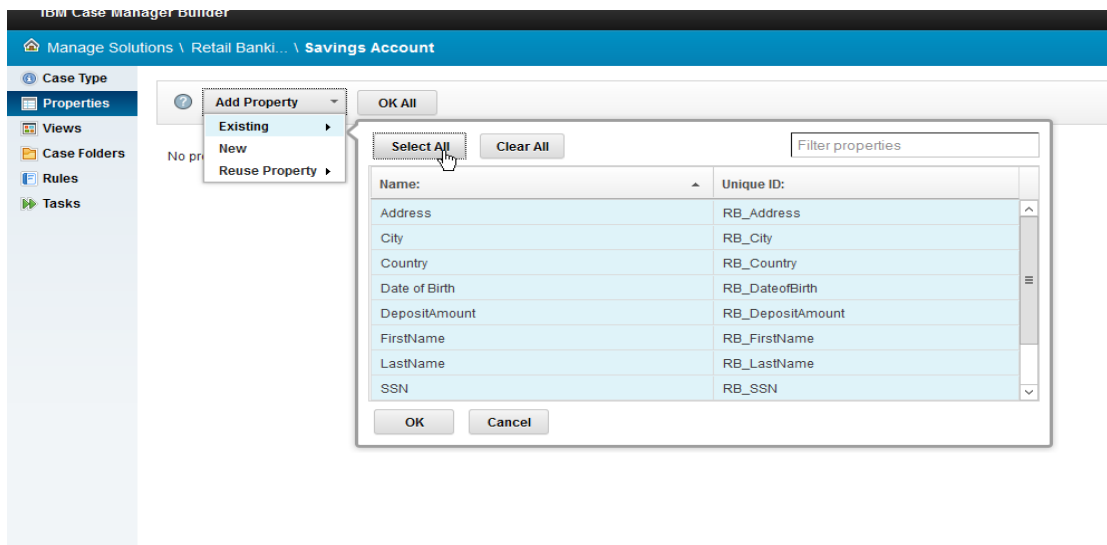
☐ Allow documents and attachments from repositories other than the case r  
☐ Display system-generated titles initially instead of the original document ti  
☐ Enable case workers to create custom tasks

Default layout for Add Case page:  
Add Case

- Click Save in the upper right-hand corner.

## **(Case Type) Properties**

- We will add all the properties that we made available to the solution to this case type. Click on the Properties menu on the left and click on Add Property -> Existing -> Select All.



- After all the properties are presented, click the OK All button.

## **Views**

- Select the Views to configure the Search properties, Layouts and Summary views.

## **Case Summary**

- In Case Summary, we will show the First Name, Last Name and Date of Birth. Select these properties and add them to the Case Summary View as shown below:



Case Title Property: Case ID

Case Summary Properties Layout Case Search

Available Properties

Select All Clear All Add to View Filter properties

Name: ▲

- Added On
- Added by
- Address
- Case Identifier
- Case State
- Case Type
- City
- Country
- DepositAmount

Properties in the Case Summary view

- Date of Birth
- FirstName
- LastName

## Case Search

- Select the SSN, First Name and Last Name properties in the Case Search view as shown below:

Case Title Property: Case ID

Case Summary Properties Layout Case Search

Available Properties

Select All Clear All Add to View Filter properties

Name: ▲


- Added On
- Added by
- Address
- Case Identifier
- Case State
- City
- Country
- Date of Birth
- DepositAmount
- Modified On
- Modified by
- Sex

Properties in the Case Search view

- FirstName
- SSN
- LastName

## Properties Layout

- Click on Add View to create a new layout view for arranging the case properties as shown below:


Case Title Property: Case ID 

Case Summary **Properties Layout** Case Search

Add View OK All

| View Name ^                        | Description ^                              |
|------------------------------------|--|
| * Name:<br>CustomView              | Description:<br>Custom View for properties |
| * Unique Identifier:<br>CustomView |  |

- Click Ok and then open the CustomView layout.

Case Title Property: Case ID 

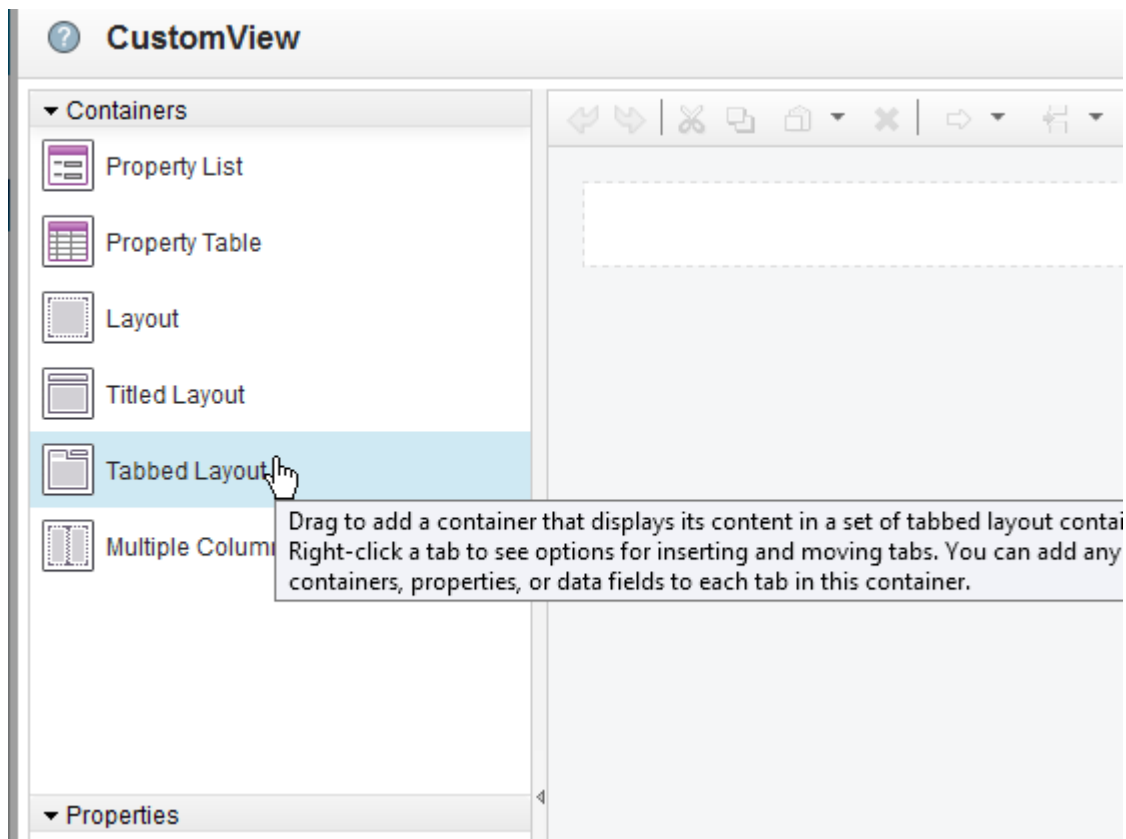
Case Summary **Properties Layout** Case Search

Add View OK All

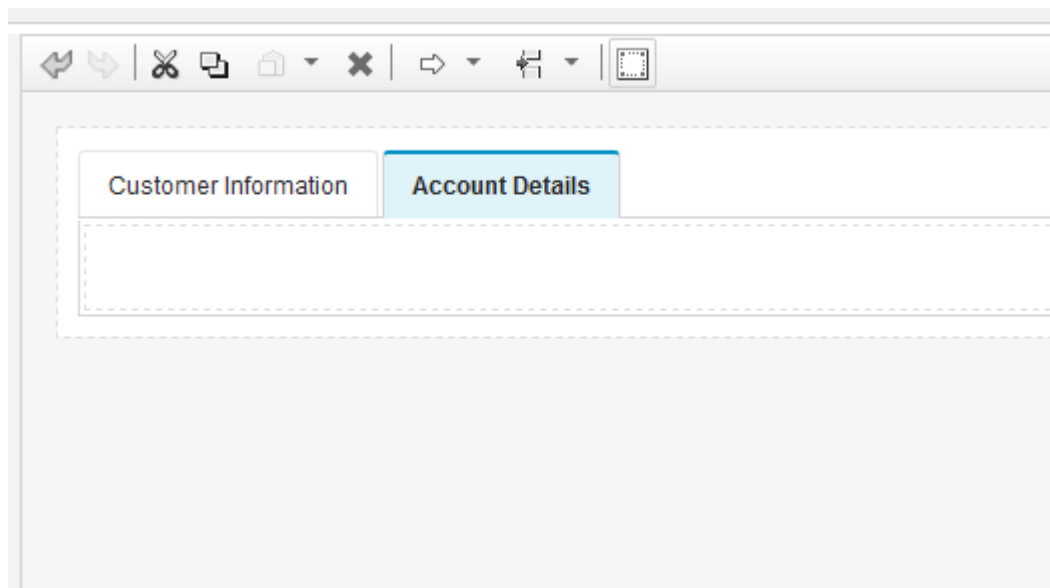
| View Name ^       | Description ^              |
|-------------------|----------------------------|
| <u>CustomView</u> | Custom View for properties |

CustomView

- Select the Tabbed Layout and drag and drop it in the working area pane in the center.



Rename the tabs as Customer Information and Account Details by Clicking on the tab and in the property pane to the right, set the Title



Save Close

▼ Settings

Layout Container Settings

Title: ? Account Details

Layout direction: ? Vertical

Label position: ? Above

Label width: ? pixels

Uniform labels: ? ☐

Automatically include: ? None

Show when empty: ? ☐

Padding: ? ☒

Click on the Customer Information and drag the Multiple Column Layout as shown:

Property List

Property Table

Layout

Titled Layout

Tabbed Layout

Multiple Column Layout

Customer Information Account Details

Drag to add a container that displays its content in a set of columns. Each column is a layout container. Right-click a column to see options for inserting and moving columns. You can add any containers, properties, or data fields to each column this container.

Properties

Case

Drag the following properties from the Properties pane to the Customer Information tab and re-arrange them in the layout as shown below:

Click on the Date of Birth property and change the Editor to Date text box

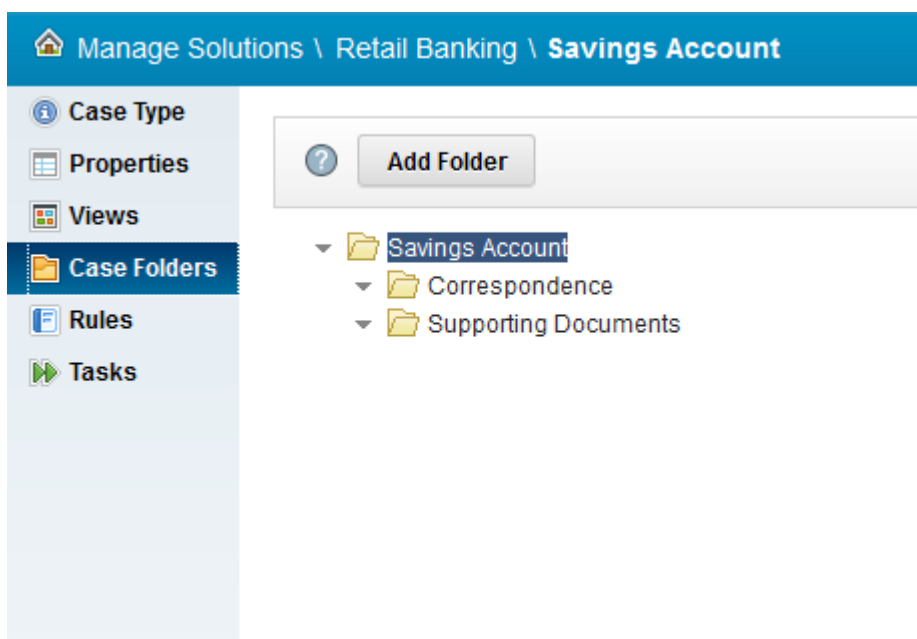
In Account Details tab, add the SSN and Deposit Amount

The screenshot shows a web form layout editor. At the top, there is a toolbar with various icons for editing. Below the toolbar, there are two tabs: 'Customer Information' and 'Account Details'. The 'Account Details' tab is selected and active. Inside this tab, there are two input fields: 'DepositAmount' and 'SSN'. The 'SSN' field is currently selected, indicated by a blue border and a blue highlight. The form is displayed within a larger window that has a light gray background.

Save the Layout and Close it.

### **Case Folders**

Create 2 folders in the Savings Account case folder -> Correspondence and SupportingDocuments.



## Tasks:

### Open New Account:

Click on the Tasks icon, then click on the Add Tasks button. Select Tasks from the list. Create the New Account tasks as shown below:

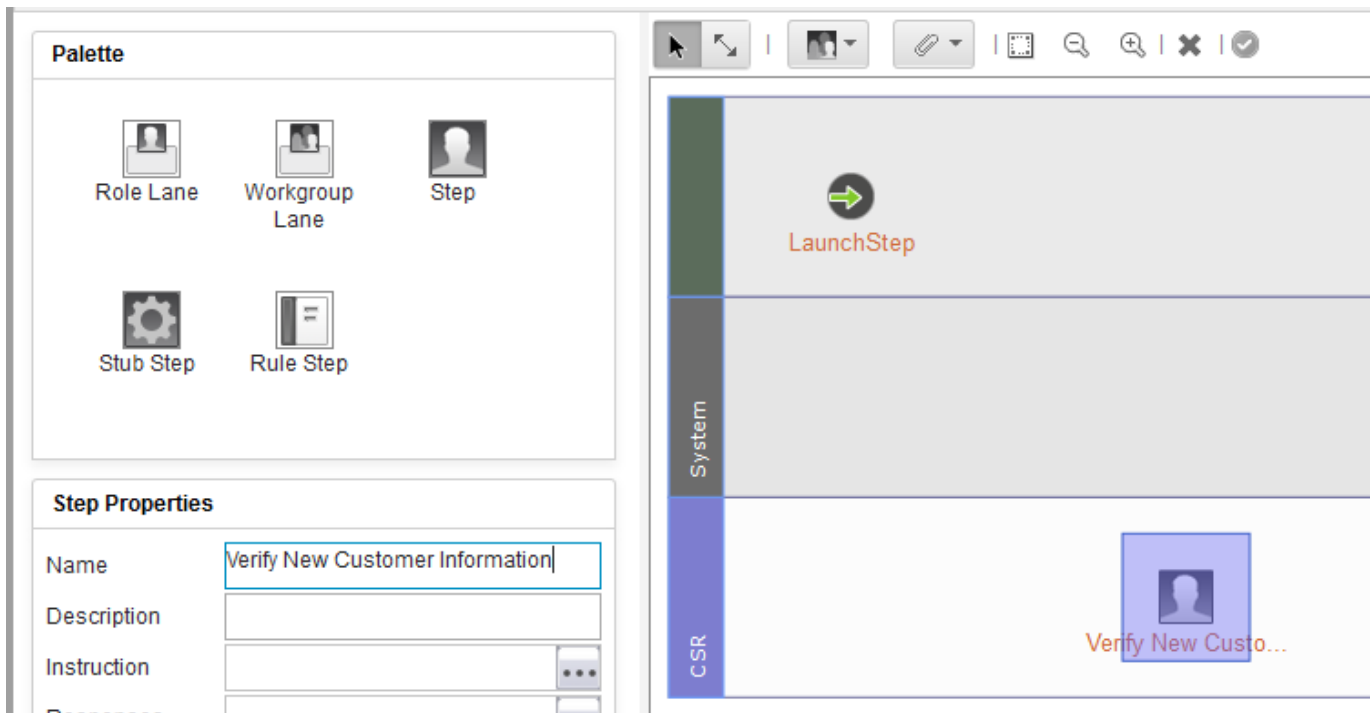
#### Add a task

The screenshot shows the 'Add a task' dialog box with the following configuration:

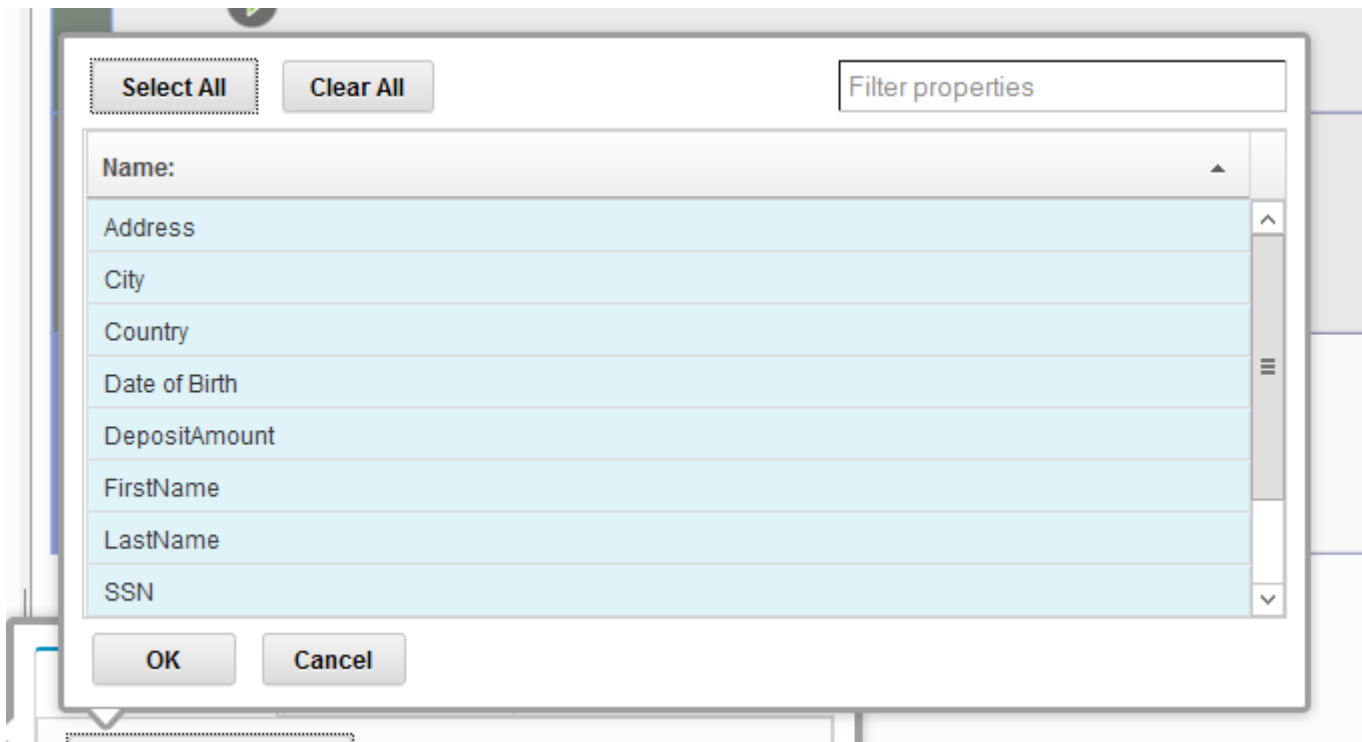
- General Tab:**
  - Name:** New Account
  - \* Unique Identifier:** RB\_NewAccount
  - Description:** (empty text area)
  - This task starts:**
    - ☒ Automatically
    - ☐ Manually
    - ☐ Discretionally
  - This task is:**
    - ☐ Hidden
    - ☒ Required
    - ☐ Automatically completed when the case completes
  - Assign to set:**
    - Dropdown menu: <None>
    - Button: Manage Sets
- Buttons:** OK, Cancel

Click OK.

Click on the Step Designer icon in the upper left corner of the New Account task. In the Step Editor, add a Role lane and set the Role to CSR. Add a Step to the CSR Role lane, and name it Verify New Customer Information.



Click on the Properties edit button for the step, and Select All properties. Click OK twice.



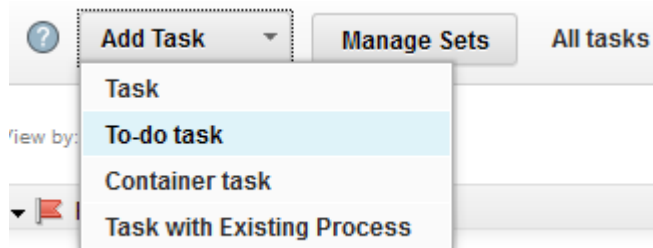
Connect the Launch Step to the Verify New Customer Information Step. Save and Close the Step Designer.



### To-do Task List:

In this section, the CSR role will be presented with a task list of documents to verify. This will ensure that the role can follow a list of item that need to be verified.

Click on the Add Task button, and select the To-do Task.



Fill in the values as shown below:

### Add a to-do task

| General   | Preconditions | Task Properties | Design Comment |
|---|---------------|-----------------|----------------|
| <p>* Name:<br/> <input type="text" value="Checklist"/></p>  |               |                 |                |
| <p>* Unique Identifier<br/> <input type="text" value="RB_Checklist"/></p>   |               |                 |                |
| <p>Description:<br/> <input type="text" value="Checklist for documents to verify"/></p>   |               |                 |                |
| <p>This task starts:</p> <p> <input checked="" type="radio"/> Automatically           <input type="radio"/> Discretionally         </p> |               |                 |                |
| <p>This task is:</p> <p> <input type="checkbox"/> Hidden<br/> <input type="checkbox"/> Required         </p>                            |               |                 |                |
| <p>Assign to set:</p> <p> <input type="text" value="&lt;None&gt;"/> <input type="button" value="Manage Sets"/> </p>                     |               |                 |                |
| <p>OK Cancel</p>  |               |                 |                |

Click on the Task Properties tab. Create 3 new properties:

- ApplicationFormVerified
- PhotoandSignatureVerified
- ProofofAddressVerified

### Add a to-do task

The screenshot shows the 'Task Properties' dialog box with the following configuration:

- Tab:** Task Properties
- Name:** ApplicationFormVerified
- Type:** Boolean
- Description:** (empty)
- Define Property Values:**
  - ☒ A single value
  - ☐ Multiple values
- \* Unique Identifier:** RB\_ApplicationFormVerified
- Default value:**
  - ☒ True
  - ☐ False
- Required:** ☐
- Hidden:** ☐

Buttons at the bottom: OK, Cancel.

All the properties are Boolean data type.

| General                            | Preconditions | Task Properties | Design Comment |
|------------------------------------|---------------|-----------------|----------------|
| <div> Add Property ▼ OK All </div> |               |                 |                |
| Name ^                             | Type ^        | Description ^   |                |
| ApplicationFormVerified            | Boolean       |                 |                |
| PhotoandSignatureVerified          | Boolean       |                 |                |
| ProofofAddressVerified             | Boolean       |                 |                |

Click OK to complete the Add To-do List process. Click on the Open To Do View Designer:

IBM Case Manager Builder

Manage Solutions \ Retail Banki... \ Savings Account

Case Type

Properties

Views

Case Folders

Rules

Tasks

?

Add Task ▼
Manage Sets
All tasks

View by: Priority | Set | Name

Required tasks

New Account

Precondition:  
Case Start
Set: <None>

Optional tasks

Checklist

Checklist for documents to verify
Precondition:  
Case Start
Set: <None>

Open To-d

In the View Designer, drag and drop a Titled Layout and change the name of the layout to Document Verification List. From the list of Properties, drag and drop the 3 properties to the Titled layout as shown below:

▼ Document Verification List

- ☐ ApplicationFormVerified
- ☐ PhotoandSignatureVerified
- ☐ ProofofAddressVerified

Save and close the View Designer. Click the Save button at the top of the page, then the Back button.

### **Verification Work Details page:**

Click on the Pages tab, and open the Work Details Page section. Make a copy of the Work Details page.

▼ Work Details Pages

| Page Name ^                  | Description ^                 |
|------------------------------|-------------------------------|
| Work Details Form            | View, update, or complete a : |
| Form Attachment Work Details | Save a form data document a   |
| Work Details                 | View, update, or complete a v |

► Custom Task Pages

Set the new page name as Verification Work Details and click the OK button.

Page Name ^

Description ^

\* Name:

Description:

\* Unique Identifier:

Open the Verification Work Details page to design the Page Designer. Click on Edit Settings of the Properties widget:



Click on Add and set the Select View to CustomView for the Savings Account Case Type:

## Properties

Settings

☐ Show the label "Properties" for this widget in the client

Add the property layout views that are to be used on this page. You can specify a diffe each case type.
 

+

Select case type:
 

Savings Account

Select view:
 

CustomView

OK

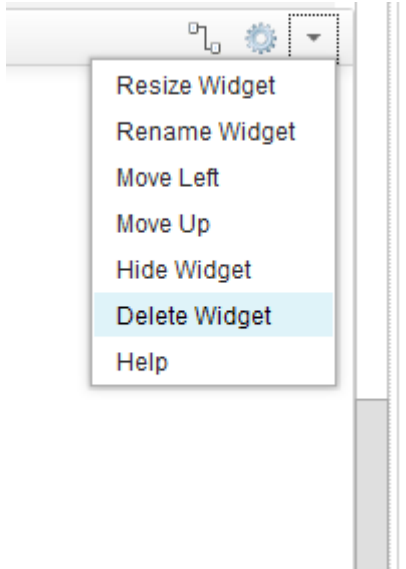
Cancel

| Case Type | View Name |
|-----------|-----------|
|-----------|-----------|

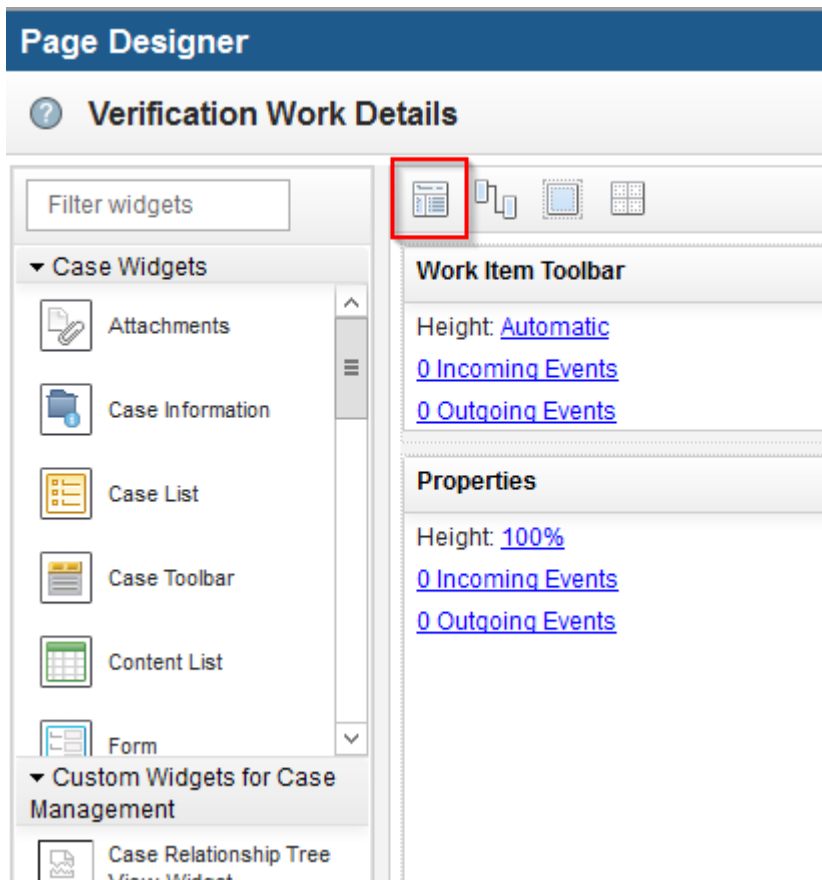
Click O.K. and O.K. Save and Close the Page Designer.

## ***Redesigning and Customizing the Verification Work Details Page:***

Open the Verification Work Details page in Page Designer. Remove the Case Information widget and the Attachment widget from the page. Click the Action dropdown and select Delete Widget.





Click on Page Options in the upper left toolbar:



Rearrange the page layout by selecting the layout as shown below:

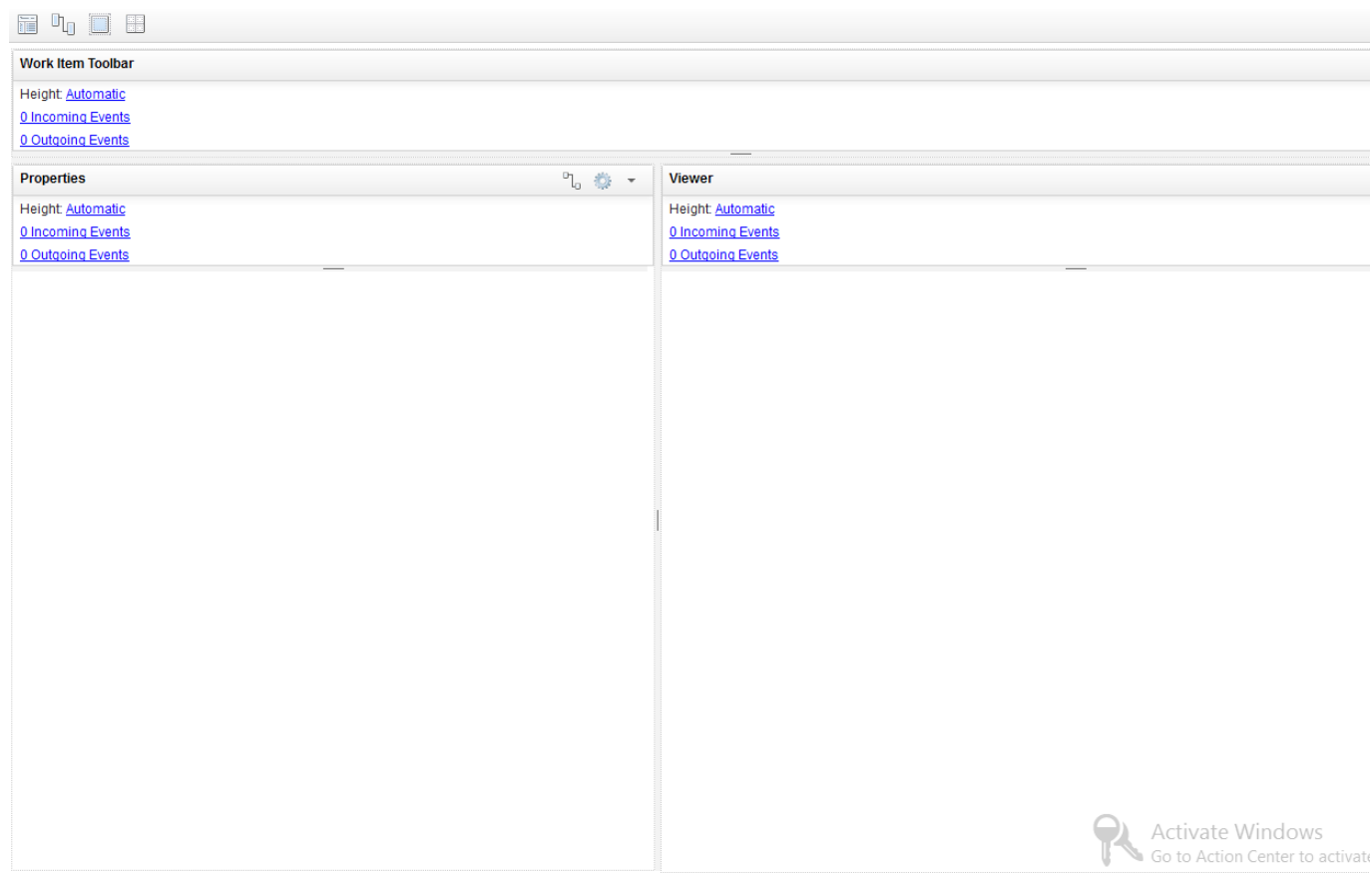
## Page Options

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

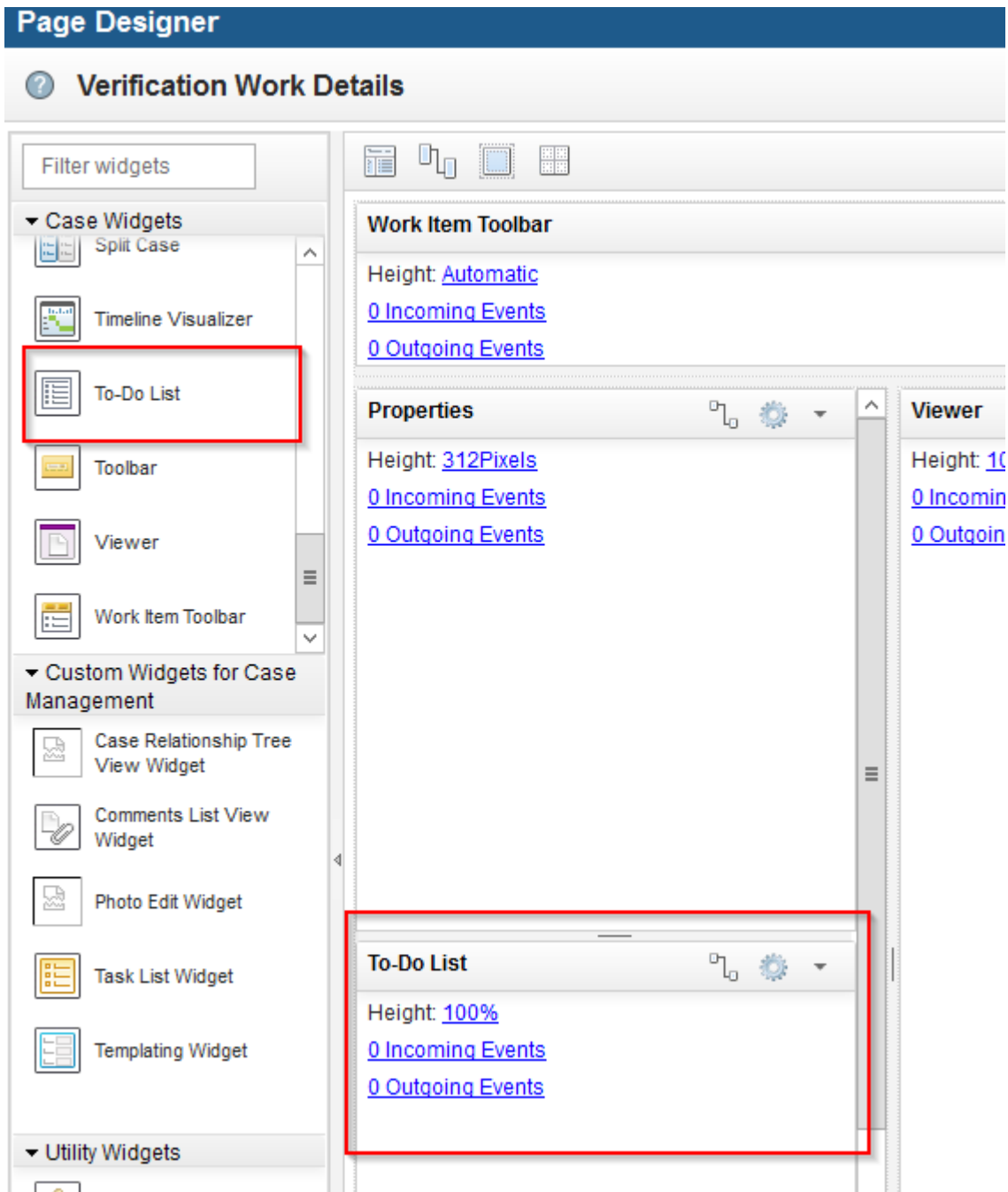
|   |  |
|---|--|
| <p><b>Page Title</b></p> <p>Verification Work Details</p> <p>Space ( )</p> <p>Step name</p> | <p><b>Layout Style</b></p> <p>Select Layout </p> <div style="display: flex; align-items: center;">  <div style="margin-left: 10px;"> <p>Height is determined by the widgets in the area.</p> <p><input type="checkbox"/> Collapsible</p> <p><input type="checkbox"/> Collapsed by default</p> </div> </div> |
|---|--|

OK Cancel

Click O.K. and Save page. Your page should look like this:



Drag and drop a To-Do List widget to the page as shown. The To Do List widget is found in the left top palette of the ICM widget. Drop this widget below the Properties widget.





Click on Save and Close the Page Designer. Go to the Add Case page and open it in the Page Designer. In the Properties widget, click on the Edit Settings icon. Click the plus button to add a setting

## Properties

Settings

☐ Show the label "Properties" for this widget in the client

Add the property layout views that are to be used on this page. You can specify a different view for each case type.

+

| Case Type | View Name |
|-----------|-----------|
|-----------|-----------|

OK

Cancel

Select Savings Account and CustomView as the Case Type and Select View. Click OK twice. Click on Save and Close the Page Designer. Go to the task New Account (Case Type Saving Account, Tasks) and open the Step Designer. Highlight the step Verify New Customer Information. Change the page layout to Verification Work Details. Save and Close the Step Designer.

**Step Properties**

|             |                                 |
|-------------|---------------------------------|
| Name        | Verify New Customer Information |
| Description |                                 |
| Instruction |                                 |
| Responses   |                                 |
| Reassign    | Yes                             |
| Deadline    |                                 |
| Properties  | Read and write                  |
| Workgroups  |                                 |
| Attachments |                                 |
| Data fields |                                 |
| Page Layout | Work Details                    |
| Swimlane    | Work Details Form               |
| Split       | Verification Work Details       |
| Join        | Form Attachment Work Details    |
|             | Work Details                    |
|             | AUTO                            |

Save and Close the solution and deploy it (commit it as well). When ready, click the Test link and open the Case Client. Create a new case by clicking the Add Case button, and selecting Savings Account as the Case Type. Fill in the property values:

### Savings Account

| Customer Information                                    | Account Details  |
|---|--|
| FirstName<br><input type="text" value="Iris"/>          | Address<br><input type="text" value="0987 Brille St"/> |
| LastName<br><input type="text" value="Chen"/>           | City<br><input type="text" value="Kansas City"/>       |
| Date of Birth<br><input type="text" value="1/31/1986"/> | State<br><input type="text" value="MO"/>               |
| Sex<br><input type="text" value="Female"/>              | Country<br><input type="text" value="U.S."/>           |

Click Add.


On the Work page, click the CSR tab to refresh the workitem list. Click on the workitem for the case that you created. Notice that you are in the Verification Work Detail page, and the workitem is for the Verify New Customer Information step of the New Account task. Below the property widget is the To-do List widget, Checklist. Click to the triangle on the left of the widget to open the checklist.

The screenshot displays the IBM Case Manager interface. At the top, the breadcrumb trail shows 'Work' > 'Cases' > 'Verification Work Details Verify New Customer Information'. Below this, the title bar reads 'Verify New Customer Information | New Account'. A 'Comments' button is visible. The main form is divided into two tabs: 'Customer Information' (active) and 'Account Details'. The 'Customer Information' tab contains fields for 'FirstName' (Iris), 'Address' (0987 Brille St), 'LastName' (Chen), 'City' (Kansas City), 'Date of Birth' (1/31/1986), 'State' (MO), 'Sex' (Female), and 'Country' (U.S.). Below the form is a 'To-do List' widget with 'Add To-Do' and 'Refresh' buttons. The widget contains a table with one item, 'Checklist', which is highlighted. The table has columns for 'Name' and 'Modified O'. A small triangle icon is visible on the left side of the 'Checklist' row.

| Name      | Modified O |
|-----------|------------|
| Checklist | 1/13/2015, |

Click on the checkboxes for the items, then click on the Complete button:

Add To-Do Refresh

| Name  | Modified O |
|---|------------|
|  Checklist | 1/13/2015, |

Document Verification List

☒ ApplicationFormVerified  
☒ PhotoandSignatureVerified  
☒ ProofofAddressVerified

Save Complete

Notice that the Checklist is now in read-only mode, and cannot be changed. Click the complete button for the work item in the upper right corner to complete the step. Go to the Case tab. In the Search field for the FirstName property, put and % and click on the Search button. A list of cases should be displayed:

IBM Case Manager

Work Cases

Add Case

Search:

FirstName

%

Search Advanced Search

| Title                          | FirstName | Case State | Modified By | Modifie |
|--------------------------------|-----------|------------|-------------|---------|
| RB_SavingsAccount_000000100001 | Jason     | Working    | P8Admin     | 1/12/20 |
| RB_SavingsAccount_000000100002 | Margaret  | Working    | P8Admin     | 1/12/20 |
| RB_SavingsAccount_000000110001 | Iris      | Complete   | P8Admin     | 1/13/20 |

Double-click on the case title that you just completed. Click on the History tab, and review the history of this case. Notice that the Checklist To-do list was completed during the work on the Verify New Customer Information step of the New Account task. By adding the To-do List widget to the Verification Work Detail page, the Checklist becomes a part of the the Verify New Customer Information step processing, combining the two tasks.

Close the case, and close the Case Client.

### ***More on Task Properties:***

Task properties can be useful as properties that are needed to assist in completing a task, but are not part of the meta-data for a case. Task properties persist workflow parameters information and make it available after the workflow is completed.

In the Case Builder, open the Retail Banking Solution and click on the Properties tab. Add a new Choice List. Click the Manage Choice Lists button and name the choice list Debit Card Request Type. Click the Add Choice Items button to add the following choices:

- New
- Existing
- College Student

### **Manage Choice Lists**

Add Choice List

Choice List ^

No choice lists are defined.

Choice list type:

String

\* Name:

Debit Card Request Type

\* Display Name

\* Value

New

New

Existing

Existing

College Student

College Student

Add Choice Item

Clear List

OK

Cancel

Close

Leave the Choice list type as String. Click OK, and Close.

Go to Case Type, Savings Account and select Tasks. Click on the Add Task button to add a new task, Debit Card Request:

**General**   Preconditions   Task Properties   Design Comment

\* Name:  
Debit Card Request

\* Unique Identifier  
RB\_DebitCardRequest

Description:

This task starts:  
☐ Automatically   ☒ Manually   ☐ Discretionally

This task is:  
☐ Hidden  
☐ Required  
☐ Automatically completed when the case completes

Assign to set:  
 <None>

Click on the Task Properties tab. We will add task properties to this task. Add the following properties:

New - Debit Card Request Type   String   Debit Card Request Type Choice List

New - Debit Card Request Date   DateTime

New - Debit Card Mailing Date   DateTime

Click OK All.

General Preconditions **Task Properties** Design Comn

Add Property ▼ OK All

| Name ^                  | Type ^   |
|-------------------------|----------|
| Debit Card Request Type | String   |
| Debit Card Request Date | DateTime |
| Debit Card Mailing Date | DateTime |


OK Cancel


Click OK. Open the Debit Card Request task in the Step Designer. Add a Role Lane and set the Role to CSR. Add a step to the Role Lane, and name the step Request Debit Card:


## Step Designer


### Debit Card Request


**Palette**

 Role Lane

 Workgroup Lane


 Step

 Stub Step

 Rule Step


**Step Properties**

|             |                    |
|-------------|--------------------|
| Name        | Request Debit Card |
| Description |                    |
| Instruction |                    |
| Responses   |                    |
| Reassign    | Yes                |
| Deadline    |                    |

 LaunchStep
   

System

CSR

 Request Debit Ca...

Add Properties to the step. Click on the “...” button next to the Properties field. Under the Case Properties tab, click the Select Property button, and Select All. Click OK. Set the case properties to Read only.



Case Properties Task Properties

Select Property ▼

|               |                                  |                       |
|---------------|----------------------------------|-----------------------|
| FirstName     | <input checked="" type="radio"/> | <input type="radio"/> |
| SSN           | <input checked="" type="radio"/> | <input type="radio"/> |
| State         | <input checked="" type="radio"/> | <input type="radio"/> |
| City          | <input checked="" type="radio"/> | <input type="radio"/> |
| Address       | <input checked="" type="radio"/> | <input type="radio"/> |
| Sex           | <input checked="" type="radio"/> | <input type="radio"/> |
| DepositAmount | <input checked="" type="radio"/> | <input type="radio"/> |
| Country       | <input checked="" type="radio"/> | <input type="radio"/> |
| LastName      | <input checked="" type="radio"/> | <input type="radio"/> |
| Date of Birth | <input checked="" type="radio"/> | <input type="radio"/> |

OK Cancel

Click on the Task Properties tab. Select Properties, Select All, and leave the properties as Read and Write.

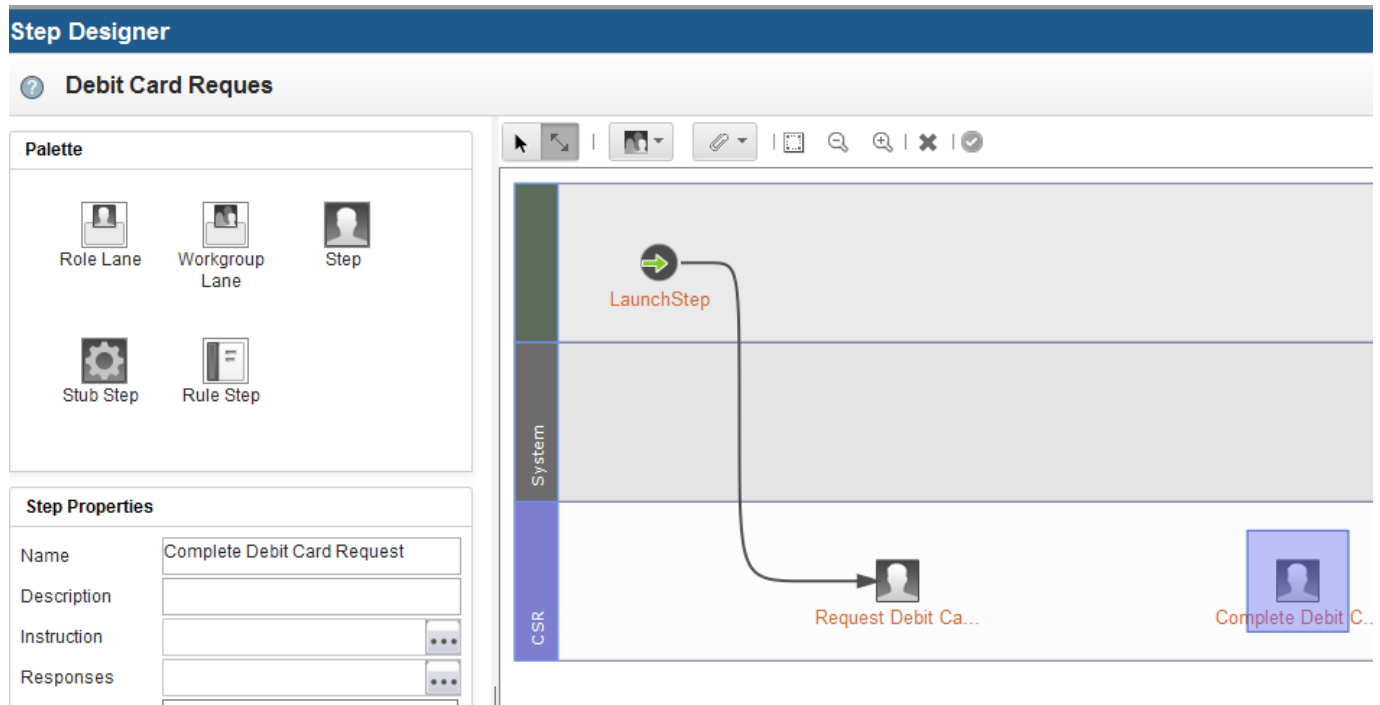
Case Properties Task Properties

Select Property ▼

| Task Properties         | Read only             | Read and write                   |
|-------------------------|-----------------------|----------------------------------|
| Debit Card Mailing Date | <input type="radio"/> | <input checked="" type="radio"/> |
| Debit Card Request Date | <input type="radio"/> | <input checked="" type="radio"/> |
| Debit Card Request Type | <input type="radio"/> | <input checked="" type="radio"/> |

OK Cancel

Click OK. Set the Page Layout field to Verification Work Details. Add a connector between the Launch Step and the Request Debit Card step. Next add another step to the CSR Role Lane, and name the step Complete Debit Card Request:



Add properties to this step as we previously did in the Request Debit Card step. . Under the Case Properties tab, click the Select Property button, and Select All. Click OK. Set the case properties to Read only.

| Property      | Read only                        | Read and write        |
|---------------|----------------------------------|-----------------------|
| FirstName     | <input checked="" type="radio"/> | <input type="radio"/> |
| SSN           | <input checked="" type="radio"/> | <input type="radio"/> |
| State         | <input checked="" type="radio"/> | <input type="radio"/> |
| City          | <input checked="" type="radio"/> | <input type="radio"/> |
| Address       | <input checked="" type="radio"/> | <input type="radio"/> |
| Sex           | <input checked="" type="radio"/> | <input type="radio"/> |
| DepositAmount | <input checked="" type="radio"/> | <input type="radio"/> |
| Country       | <input checked="" type="radio"/> | <input type="radio"/> |
| LastName      | <input checked="" type="radio"/> | <input type="radio"/> |
| Date of Birth | <input checked="" type="radio"/> | <input type="radio"/> |

Click on the Task Properties tab. Select Properties, Select All, and leave the properties as Read and Write.

| Task Properties         | Read only             | Read and write                   |
|-------------------------|-----------------------|----------------------------------|
| Debit Card Mailing Date | <input type="radio"/> | <input checked="" type="radio"/> |
| Debit Card Request Date | <input type="radio"/> | <input checked="" type="radio"/> |
| Debit Card Request Type | <input type="radio"/> | <input checked="" type="radio"/> |

Click OK. Set the Page Layout field to Verification Work Details. Add a connector between the Request Debit Card step and the Complete Debit Card Request step. Save and close the task.

Click on Views, and the Properties Layout tab. Click on CustomView and open the Properties View Designer. Under the Properties palette, select the Debit Card Request task. The following task properties will be displayed. Drag and drop these three task properties under the Account Details tab:

The screenshot displays the IBM Case Manager Properties View Designer interface. On the left, the 'Containers' pane lists various layout options: Property List, Property Table, Layout, Titled Layout, Tabbed Layout, and Multiple Column Layout. Below this, the 'Properties' pane shows the selected task, 'Debit Card Request', with a filter input and a list of available properties: Debit Card Mailing Date, Debit Card Request Date, and Debit Card Request Type. The main workspace on the right shows a tabbed layout with two tabs: 'Customer Information' and 'Account Details'. The 'Account Details' tab is active, displaying a form with the following fields: DepositAmount (text input), SSN (text input), Debit Card Request Type (dropdown menu), Debit Card Request Date (date and time picker showing 1/15/2015 12:00 AM), and Debit Card Mailing Date (date and time picker showing 1/15/2015 12:00 AM). The 'Debit Card Request Date' and 'Debit Card Mailing Date' fields are highlighted with a blue border.

Save and Close the Properties View Designer. Click Save and Close. Deploy (and Commit) the solution. Click Test to open the Case Client. If necessary, click the Retail Banking Solution link in the upper right-hand corner and assign p8admin to the CSR role.

Click Add Case, Savings Account, and add a case. Fill in the Customer Information and

Account Details. Notice that the Account detail tab does not contain any task properties:

The screenshot shows a web form titled "Savings Account". It has two tabs: "Customer Information" and "Account Details". The "Account Details" tab is selected. Below the tabs, there are two input fields. The first is labeled "DepositAmount" and contains the value "55,000". The second is labeled "SSN" and contains the value "987-25-3265".

Click Add. In the Work tab, locate the work item Verify New Customer Information, and click on the link. In the Properties widget, notice that the Task Properties for the Debit Card are not displayed in the Account Details tab. The Debit Card Task Properties are only assigned to the Request Debit Card task, and are not Case Properties, so they do not appear in the Add Case property widget or the New Account task steps property widget in the Verification Work Details page.

Check the three To-do items in the To-do list widget and click Complete. Complete the Verify New Customer Information step. Click on the Cases tab, put an % in the search field, and click the Search button. Double click on the case that you just created.

Under the Task tab, Start the Debit Card Request task. Click Yes to confirm. Notice that none of the Debit Card task properties are displayed in the properties widget. Close the case.

Click on the Work tab, and open the Request Debit Card work item. Under the Account Details tab, you will see the Debit Card task properties. Set the Debit Card Request Type to New, and the Debit Card Request Date to today's date.

The screenshot shows the 'Account Details' tab in the IBM Case Manager interface. The 'Customer Information' section contains the following fields:

- \* DepositAmount**: A text input field containing the value '55,000'.
- SSN**: A text input field containing the value '987-25-3265'.
- Debit Card Request Type**: A dropdown menu with 'New' selected.
- Debit Card Request Date**: A date and time field showing '1/15/2015' and '12:00 AM' with a confirmation icon.
- Debit Card Mailing Date**: A date and time field showing '1/15/2015' and '12:00 AM' with a confirmation icon.

At the bottom of the form, there are two buttons: 'Add To-Do' and 'Refresh'.

Complete the step, and return to the Work page. Open the Complete Debit Card Request work item, go to the Account Details tab. Notice that the values for Debit Card Request Type and Debit Card Request Date have been retained and carried forward to this step in the task. Update the Debit Card Mailing date to next week.

Work Cases  Verification Work Details Complete

## Complete Debit Card Request | Debit Card I

Comments

Customer Information

Account Details

\* DepositAmount

55,000

SSN

987-25-3265

\* Debit Card Request Type

New

Debit Card Request Date

1/15/2015

12:00 AM

Debit Card Mailing Date

1/22/2015

12:00 AM

Add To-Do

Refresh

Name

Modified O

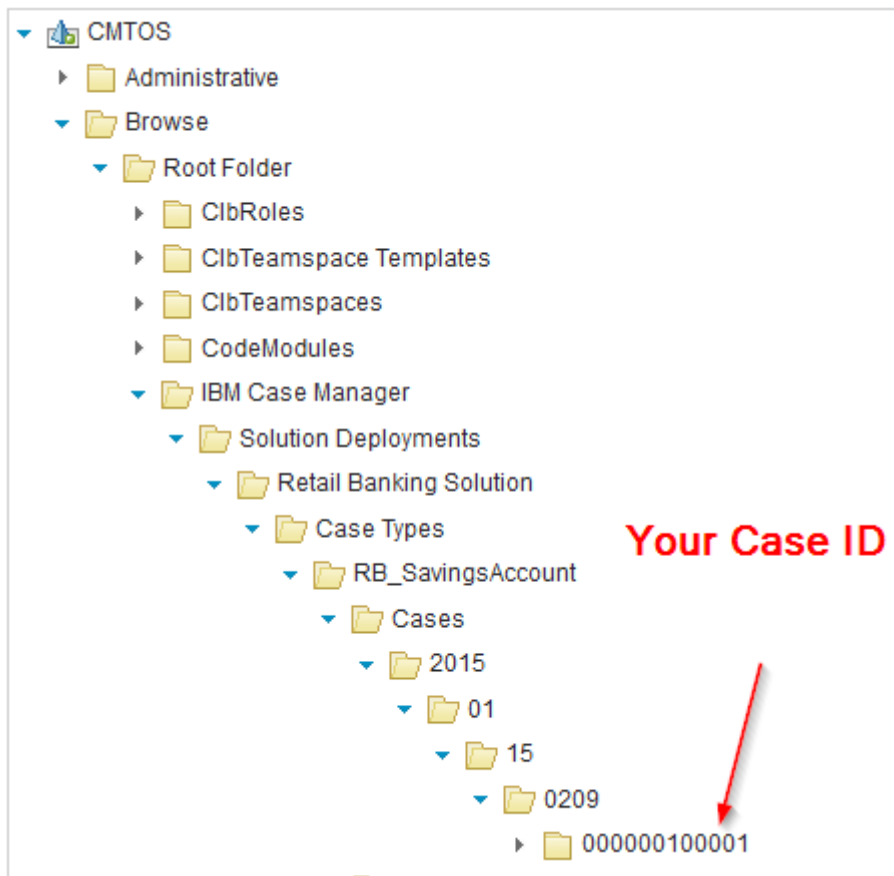


Checklist

1/15/2015,

Complete the step. Under the Cases tab, put an % in the search field, and click Search. Open the Case that you just completed. Write down, or cut and paste the Case ID (like RB\_SavingsAccount\_000000100001). Close the case, and Close the Case Client.

Open the ACCE Client (there is a short-cut on the Windows desktop). Under Object Stores, double-click on CMTOS. Go to Browse, Root Folder, and follow the folder chain to your case folder, with the case ID that you copied. Double-click on the folder.



Click on the Tasks tab, and open the Debit Card Request task. Click on the Properties tab, and scroll to the bottom. You will see the Debit Card Task Properties and their values.



CMTOS 00000010000... x Debit Card ... x

Save Refresh Actions Copy Object Reference Close

Task: Debit Card Request

General Properties Security

[Learn more...](#)

| * ▼ | Property Name                | Property Value                                     |   |
|-----|------------------------------|--|---|
|     | Is Container                 | False  | ▼ |
|     | Last Restart Date            |  | ▼ |
|     | Restart Count                |  | ▼ |
|     | Excluded For Case Completion | False  | ▼ |
|     | Is ToDo                      | False  | ▼ |
|     | Debit Card Request Date      | January 15, 2015 at 12:00:00 AM Pacific Standard T | ▼ |
|     | Debit Card Request Type      | New  | ▼ |
|     | Debit Card Mailing Date      | January 22, 2015 at 12:00:00 AM Pacific Standard T | ▼ |

These properties are not Case properties, and they are not stored as properties of the Case folder. As task properties, the values are stored with the task instance. Also, if you add these properties to other tasks, these values are not available, and the other task will store only property values within its task instance. In order to have Case properties or other task properties carry the same values, you need to use the Process Designer to Assign work item

properties to Case properties.

### ***Configuring the In-baskets for Push notification:***

By configuring the In-baskets for the CSR role in Push Notification, we will provide the user the ability to process work items automatically without having to pick one from the queue. This is a very common scenario for “heads down” knowledge workers.

Open the Retail Banking Solution in the Case Builder. Under the Pages tab, open the Work page in the Page Designer. Click on the In-baskets widget -> Edit Settings button.



In the Settings tab, configure the Select the work mode to “Hide work items in role in-baskets” and Provide the instructions to worker to process the work items:

#### **In-baskets**

Settings

Menu

Toolbar

Specify the role for the in-basket and the work items that are to be included in the in-basket. [Learn More](#)

Role:

☐ Show work item counts for all in-baskets

☐ Hide the tab if there is only one in-basket for the role

☐ Do not populate the in-basket until the dynamic filter is received

Select the work mode

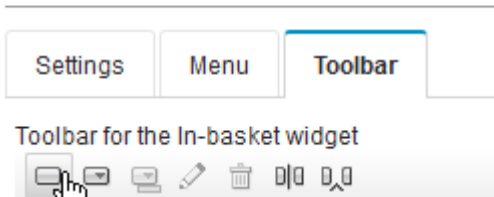
Hide work items in role in-baskets

Provide instructions for the user to process the next work item:

Click the Process Work items button to process work items

In the Toolbar tab, click on the Add button:

## In-baskets



Select the action as “Open Next Work item” and set the Label to Process work items:

\* Action:

Alignment:

\* Label:

OK Cancel

Click OK twice and Save and Close the page.

Open the Verification Work Details page in the Page Designer. Click on Edit Settings of the Work Item Toolbar. In the Toolbars tab, select the Complete label and click on Edit (the pencil icon):

Toolbar for:

| Label    | Action                   |
|----------|--------------------------|
| Comments | Add Comment to Work Item |
| Complete | Dispatch Work Item       |
| Save     | Save Work Item           |
| Close    | Close Work Details Page  |

Check the selection for getting the next work item automatically

Action:

Dispatch Work Item

Alignment:

Right

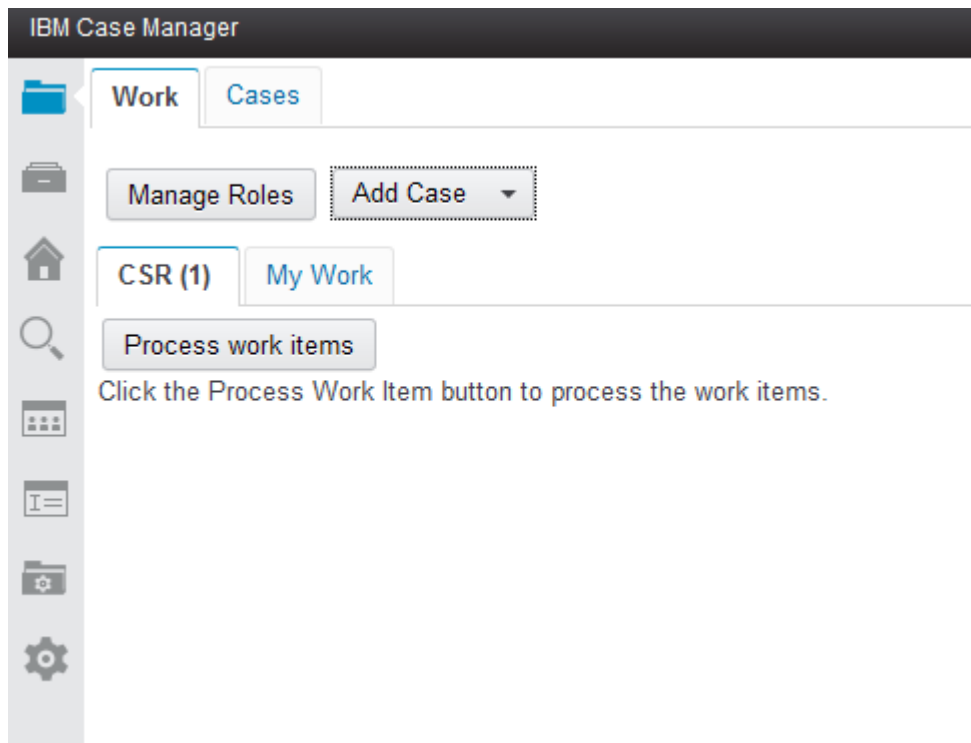
\* Label:

Complete

☒ Automatically get the next work item

☒ Display a separate button for each response

Click O.K. twice, then Save and Close the page. Save and Close the solution, and deploy the solution. Test the solution by launching the Case Client (click on the Test link in the Case Builder solution listing) and in the CSR inbasket, you will see that the modified inbasket displaying the instructions and the button to process it.



Since we enabled the checkbox to hide work item listings, the inbasket does not show any work items but does show the count -> CSR(1). To test this functionality, you will need at least 2 entries in your inbasket. Create two or three new cases using Add Case button.

Return to the Work page. Click on Process work items button and the first work item will be opened. Complete the Checklist, and Click on Complete. The system will automatically open the next work item without the user having to open a work item from the inbasket. After all work

items are finished, you will receive a message stating there are no more work items.

You have completed the lab.