



IBM Case Manager 5.2.1 Case Manager Builder

Business Partner Field Enablement Workshop

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Module Overview

- Demonstrate how to use Case Builder to develop, deploy and test a case solution
 - We will walk through a simple scenario of setting up a case for managing the logistics around organizing a course to teach the use of the Case Builder
- Develop a familiarity with the Case Builder artifacts and terminology
- Following the presentation, you will have a chance to explore the Case Builder. Later you will have a chance to create something more substantial.

ICM Phases and Owners



IT Administrator



IT Administrator

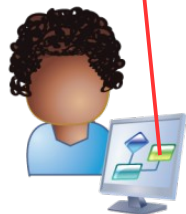
**Installation &
Configuration**

**Solution
Design
(Case Builder)**

**Solution
Development
(Enterprise
Integration)**

**Solution
Deployment**

Run Time



Business Analyst



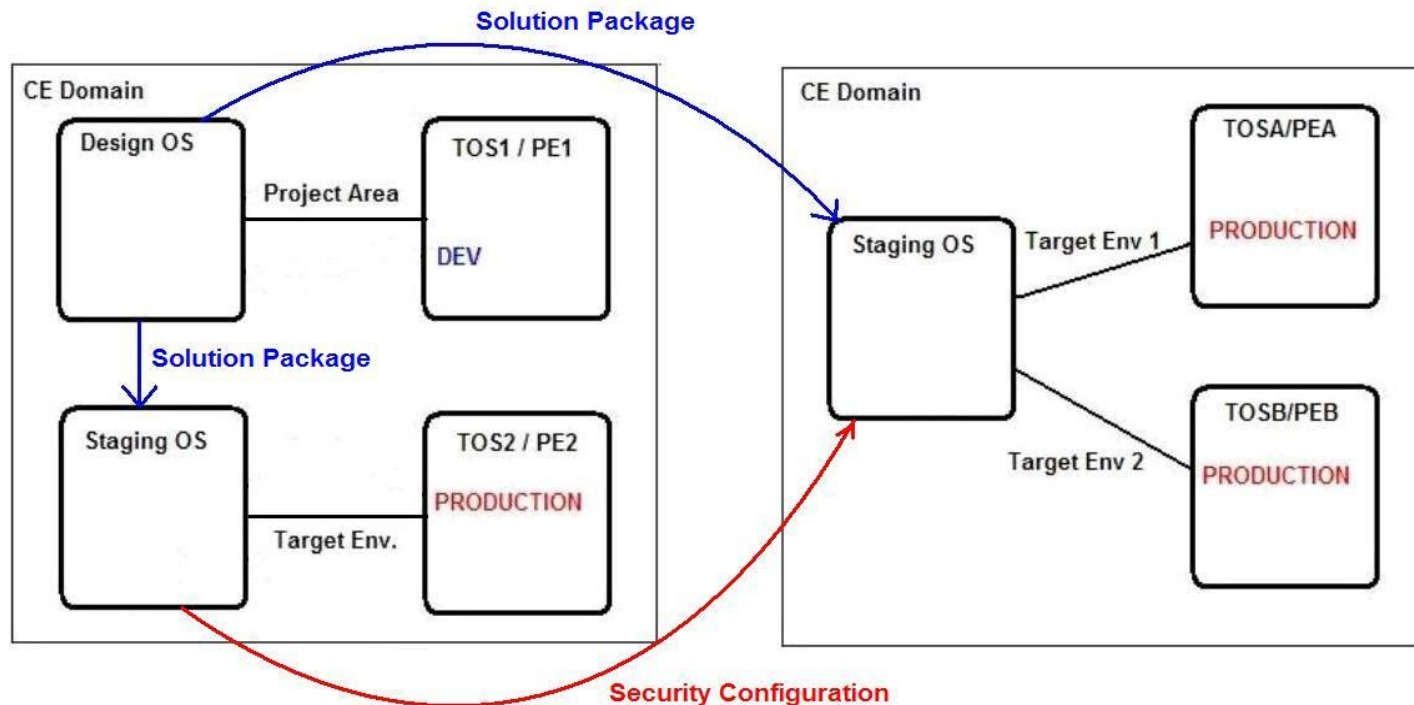
Developer



Case Worker

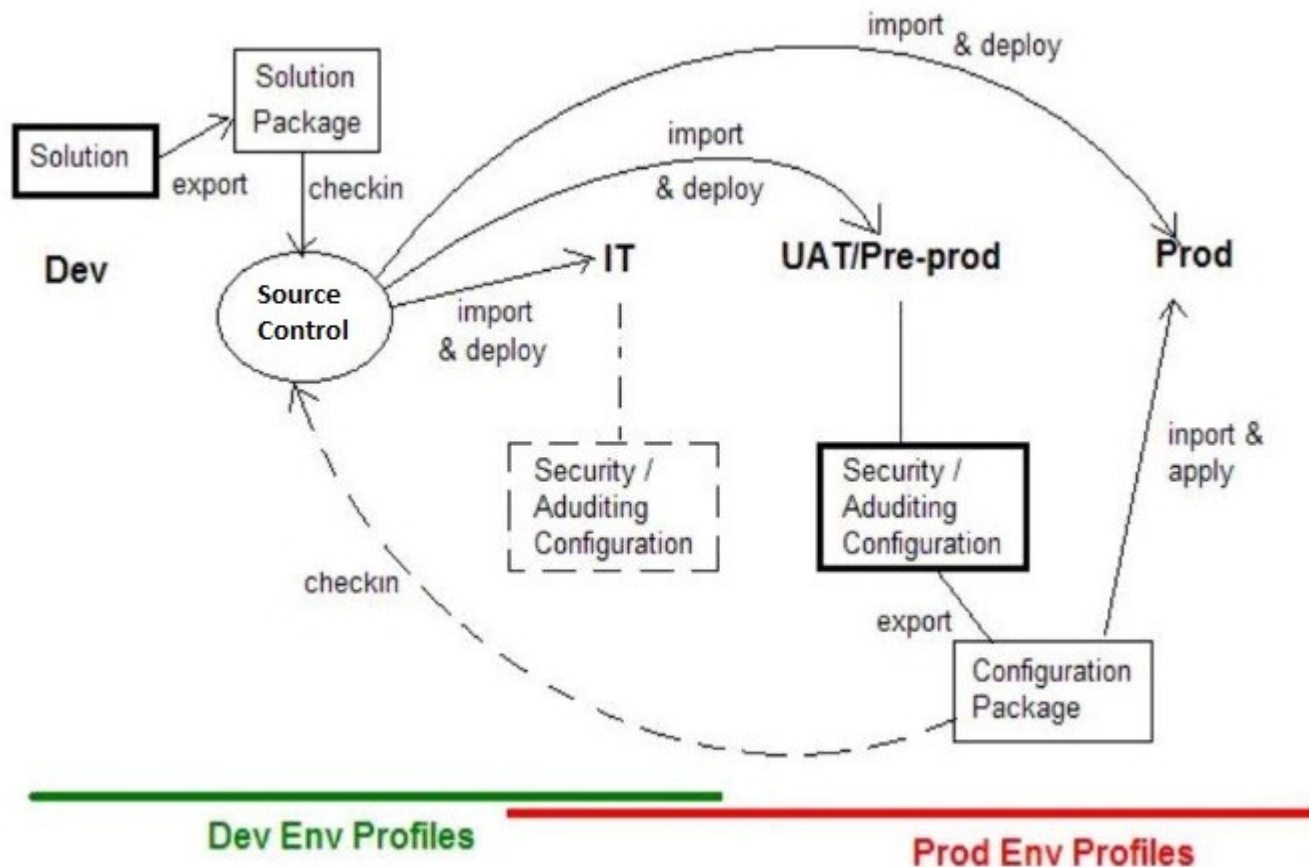
Deployment Environments

- Development Environment and Production Environment (IT/UAT) can be within same CE Domain or multiple Domains
- Exercise solution and configuration migration properly
- Configure security for a deployed solution as if it is in a production system and use proper end user accounts for security tests
 - Do not sign in as administrator into Case Client



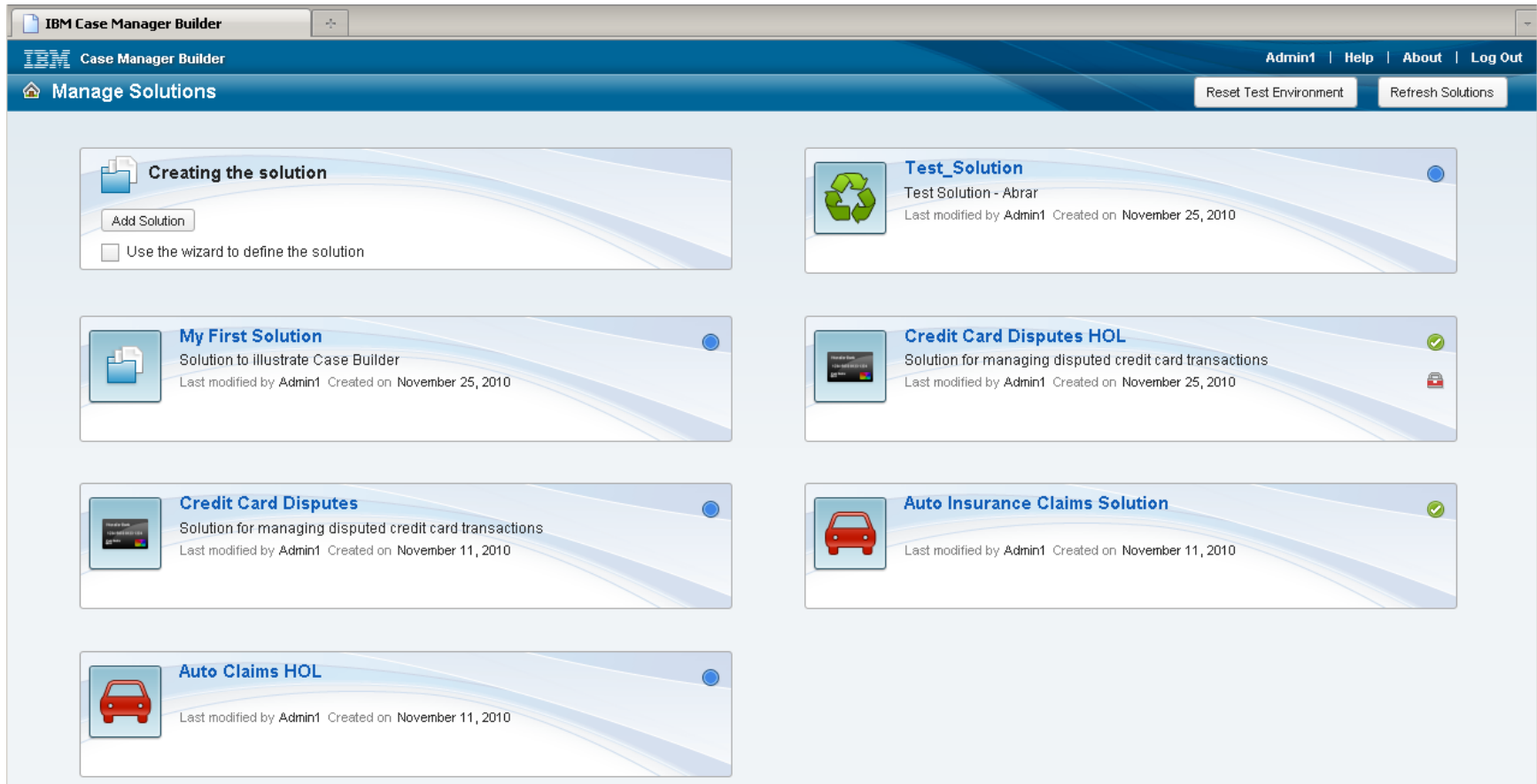
Stages of Target Environments

- Solution Package coming from Development Environment
- Security and auditing are configured/tested early via production environment profile



What is Case Builder ?

A web-based GUI for designing and composing the Case artifacts that make up a Case Solution.



Planning

You don't need programming skills to develop a solution or use Case Builder, instead you need to:

- Understand the business scenario and capture the domain expertise and business practice to facilitate building a case solution
 - What are you solving?
 - Who is involved?
 - Where is the information kept?
 - How are you solving it and driving to closure?
 - When do various procedures need to be done?
 - Why do they need to be done?

Business Problem Analysis (cont.)

- What are the problem scenarios to be solved
 - A problem scenario usually maps to a Case Type, then each case instance will be driven to completion
 - Multiple Case Types within an ICM solution
- Who the players are for driving the case to resolution collaboratively
 - Roles
 - Heads-down case workers (inbasket driven and pulling work from a work queue for the same role) vs. Case Owner/Workers/Supervisors (work with case and make case decisions based on the whole case context)
 - What should they see to facilitate their work (various pages and views, exposed step parameters and attachments during a process)
- What other case information and assets need to be collected as part of the case
 - Case properties
 - Document Types
 - runtime Comments

Business Problem Analysis (cont.)

- What needs to be done to drive the case to resolution
 - Tasks (required, optional, discretionary or even worker defined custom task)
 - How are the tasks triggered or related (preconditions, inclusive/exclusive, container vs. subtasks)
- What processes does the Task perform and how each role is involved
 - Task processes, Steps and Roles
- What other external information system or business decision facility need to be integrated
 - WebServices callouts, component step/integrator, rule integration, etc.
- Security model is also an intrinsic part of the solution design
 - What each role can do and what kind of rights are needed
- What are the auditing/governance requirements to be tracked
 - Both CE Auditing and PE Event logging to Case History/Visualizer as well as for Case Analyzer/Monitor

Terminology Related to Case Builder

Let's look at the key artifacts in Case Manager, as used in Case Builder:

- Solution = Case Manager implementation of a framework for managing a set of business problems through case management
 - Can contain multiple Case Types
- Page = UI presentation which in turn contain widgets
- Case Type = particular type of business problem to be managed; an instance is a Case
 - Can contain multiple Properties, Tasks, Views, and Rules
- Document Type = a Document Class in P8 Content Engine
- Property = data that is stored as part of a Case or Document
- Task = list of items that need to be completed in the context of a case
 - Can have preconditions, automatic/manual/discretionary, required, hidden, etc.
 - Can contain a Process with multiple Steps
- Task Step = one of the actions in a process flow for a task
- Set = an optional grouping of Tasks where all must be completed (Inclusive), or only one is allowed (Mutually Exclusive)
- Container Task and SubTasks

Terminology Review (cont.)

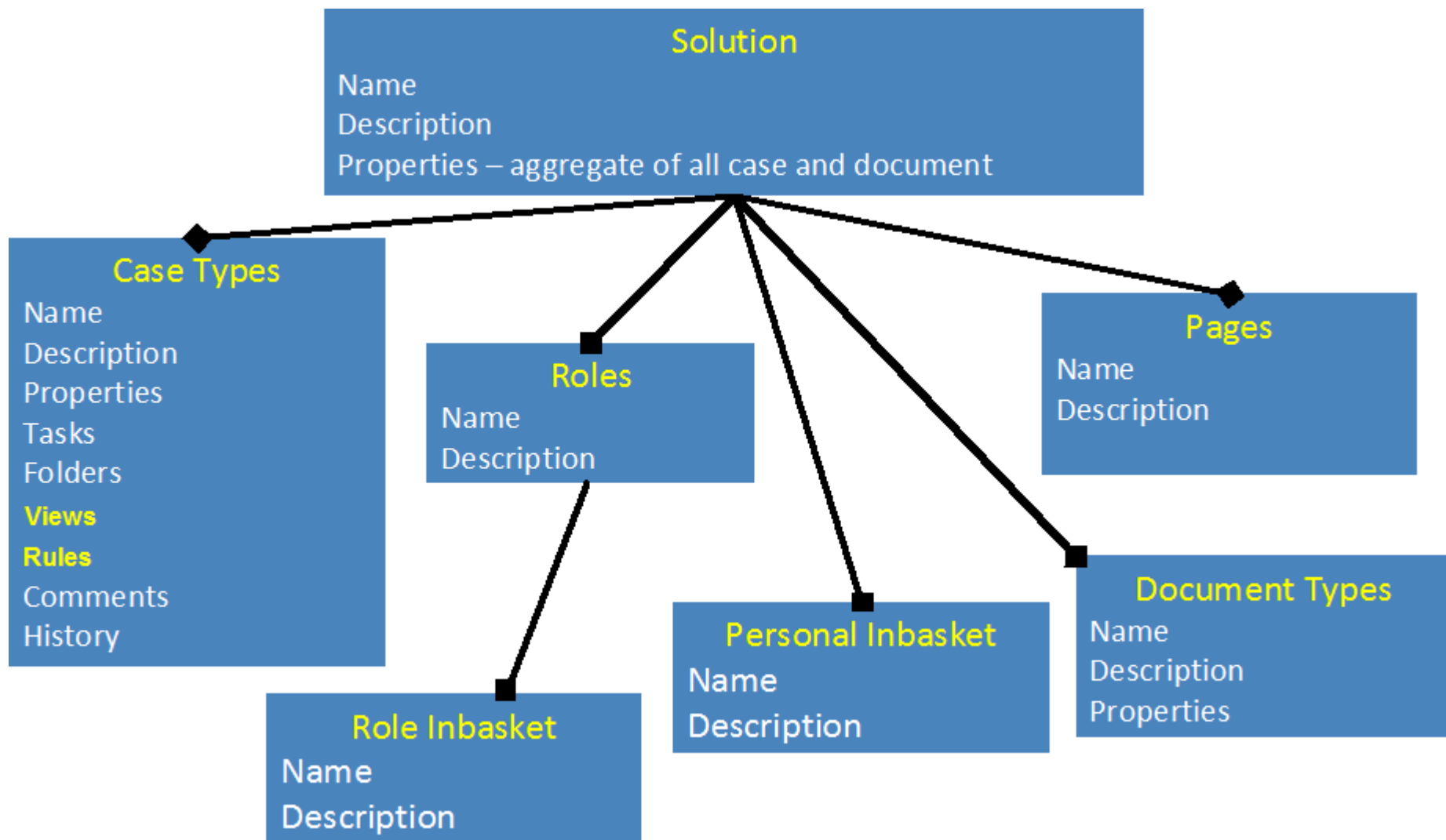
Now, the artifacts reflecting the “Who” and “When” of managing the cases

- Role = a collection of accounts (users and/or groups) associated with a specific business function. These are used to control access to case assets or steps in a work queue.
- Workgroup: similar to Role, refer to table of differences below
- In-Basket = a container giving you access to work items assigned to you or others
 - Personal: contains items assigned directly to you, or to your workgroup
 - Role: contains items assigned to the role
- Swimlane = map to a role as a partition in the Step Editor for organizing the responsibilities for steps.

Table 1. Differences between roles and workgroups

Roles	Workgroups
Roles are created at the solution level and can be reused for more than one task or case type.	Workgroups are created at the task level and are not shared. If you want to reuse a workgroup name, you must create the workgroup manually in each task.
Each role is assigned an in-basket at the solution level.	Workgroups do not have in-baskets. Work assigned to workgroup members is located in the personal in-basket for the member.
The Process Engine creates a work queue for each role in the solution.	Workgroups are not assigned to a queue. Each member of the workgroup receives the work item. When a work item (step) is assigned to a workgroup to complete, all members of the work group must process and complete the item.


ICM Solution Model Overview




Case Builder UI

IBM Case Manager Builder

Manage Solutions \ Steven Security Test 3



Steven Security Test 3

Steven Security Test 3 

Solution prefix: SST3

Created by pwtest370

Created on July 20, 2013

Properties


Roles

In-baskets

Document Types

Pages

Case Types



Add Role

OK All

Partner

outside worker

Worker

back office worker

* Role:

Description:

Supervisor

back office supervisor

Role Settings

Pages

Assign Page

Name

Cases

Work

Reports

Description

Search for cases, view...

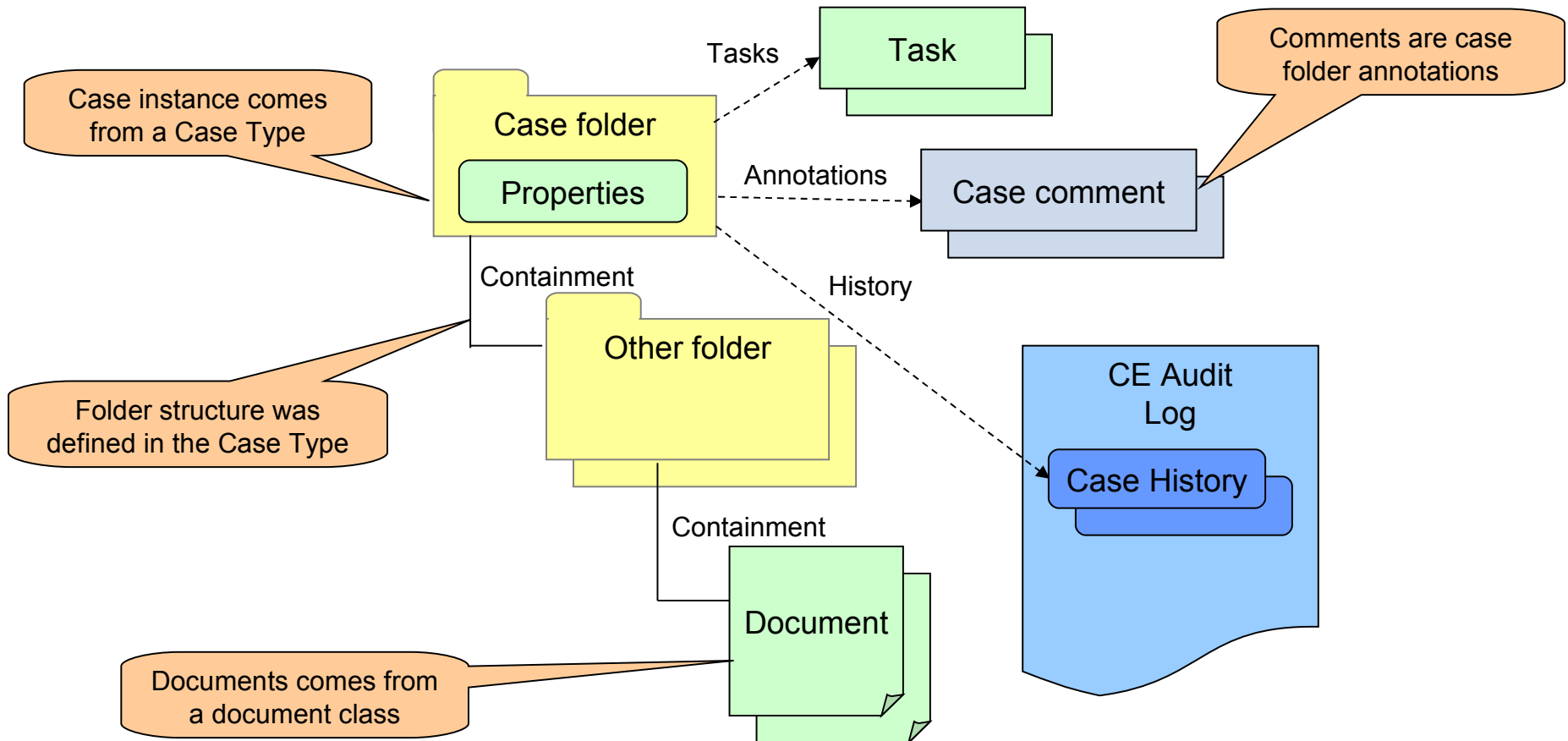
View and work with wor...

What Files Does Case Builder Create?

- Case Builder's output is stored in the Case Manager Design Object Store (CMDOS) and used to deploy to the Case Manager Target Object Store (CMTOS), Workflow System region and Rule Repository
- Creating (and saving) a Solution in Case Builder results in these files in the CMDOS:
 - a Solution Definition (sdf.xml)
 - a PE Configuration (config.xml)
 - Workflow Definitions (Global Workflow Collection as well as a Workflow Definition xpd file for each Case Type that has Tasks defined)
 - Pages
 - Views and Rules for each Case Type
 - To see these in ACCE/FEM: open the CMDOS object store, expand Root Folder, go to IBM Case Manager → Solutions → <solution name>
- Deploying a Solution in Case Builder results in:
 - In the CMTOS: property templates, class definitions, associated event handlers and subscriptions, UI elements like pages, views, etc.
 - In PE isolated region (CMTOS DB): application space, roster, queue, and data fields
 - In Rule Repository: compiled rulesets

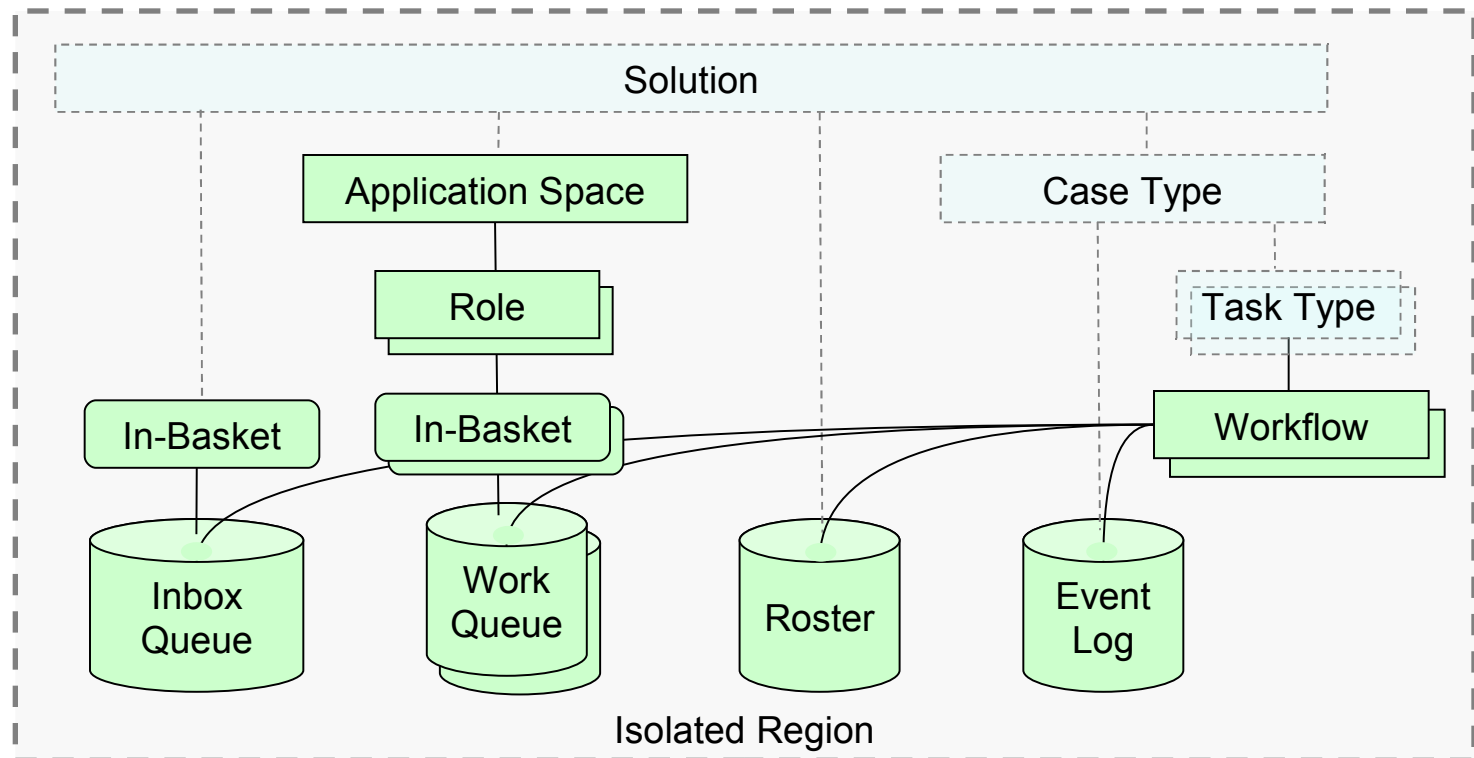
Case Infrastructure

- Cases, tasks, documents, and comments are persisted in CE
- Case data lives on long beyond any process and workflow data



Case Infrastructure (cont.)

- A solution has a Roster, and each Case Type has a Event Log
- A solution also has an Application Space, Roles are defined within an application space
- Each Role has a corresponding work queue, and inbaskets are like views of the queues



Getting Started

Start Case Builder by opening `http://<server>:<port>/CaseBuilder`

Use one of these approaches for starting to create a Solution in Case Manager Builder:

- 1) Create a solution
 - Tabs for defining all of the components of the Solution
 - Same screens as when you choose Edit after initially creating the Solution
- 2) Create a solution from template
 - A solution can be promoted to become a template
 - Templates can also be made available on the web or via partner and prepared/staged within Design OS
- 3) Copy an existing solution

Developing a Solution with Case Builder

- Use Case Builder to define the basic initial subset of the solution components:
 1. Create one or more Case Types
 - Name
 - Description
 - Define tasks
 2. Create Roles
 3. Create Document Types
- Further build out the Solution definition:
 4. Enhance the Case Types
 - Define custom properties
 - Create folder structure for content
 - Refine tasks and add processes
 5. Refine in-baskets
 6. Build additional pages, and Case Type views and rules
 7. Deploy the solution
 8. Test the solution
- Rework the solution by repeating steps until the solution works as desired

Solution Building Demo

- Start a skeleton solution
- Commit and open up for multi-user editing
- Solution lock management
- Commit the various BA changes, and Deploy the solution
- Test the solution
- Further build out the solution
- Step Editor and Process Designer roundtripping
- Repeating steps until the solution works as desired

Page Management in Case Builder

- The default pages in Case Builder:

- Solution Pages

Work, Cases

- Case Details Pages

Case Details, Case Details Form

- Add Case Pages

Add Case, Add Case Form

- Split Case Pages

Split Case

- Add Task Pages

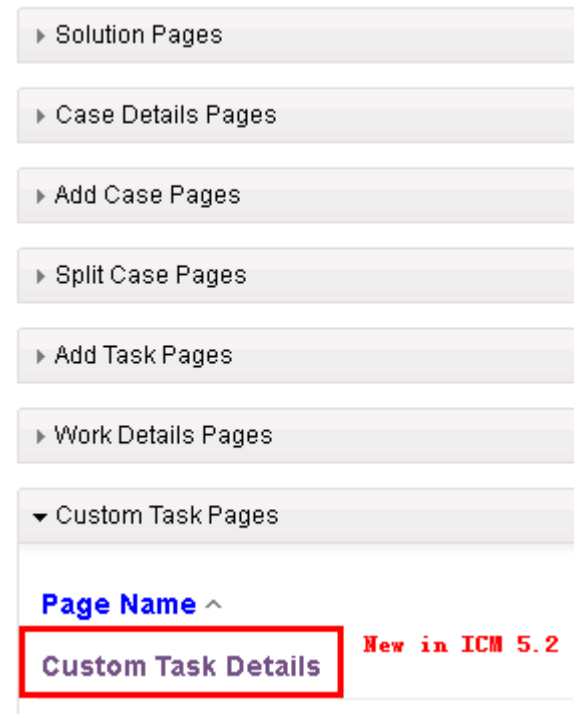
Add Task, Add Task Form

- Work Details Pages

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

- Custom Task Pages

Custom Task Details



Page Management in Case Builder

IBM Case Manager Builder

Manage Solutions \ BVT0703

Show Locked Items Validate Save Save and

BVT0703
Edit solution description
Solution prefix: B0703
Created by p8admin
Created on July 3, 2013

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

Add Page OK All

Link and menu to launch page designer

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

Page Management in Case Builder

IBM Case Manager Builder

Manage Solutions \ Credit Card Dispute Management

Show Locked Items Validate Save Save and Close

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

Properties Roles In-baskets Document Types Pages Case Types

Add Role OK All

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

Role Settings Pages

Assign Page

Name
Cases
Work

IBM Case Manager

Cases Work

Add Case

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

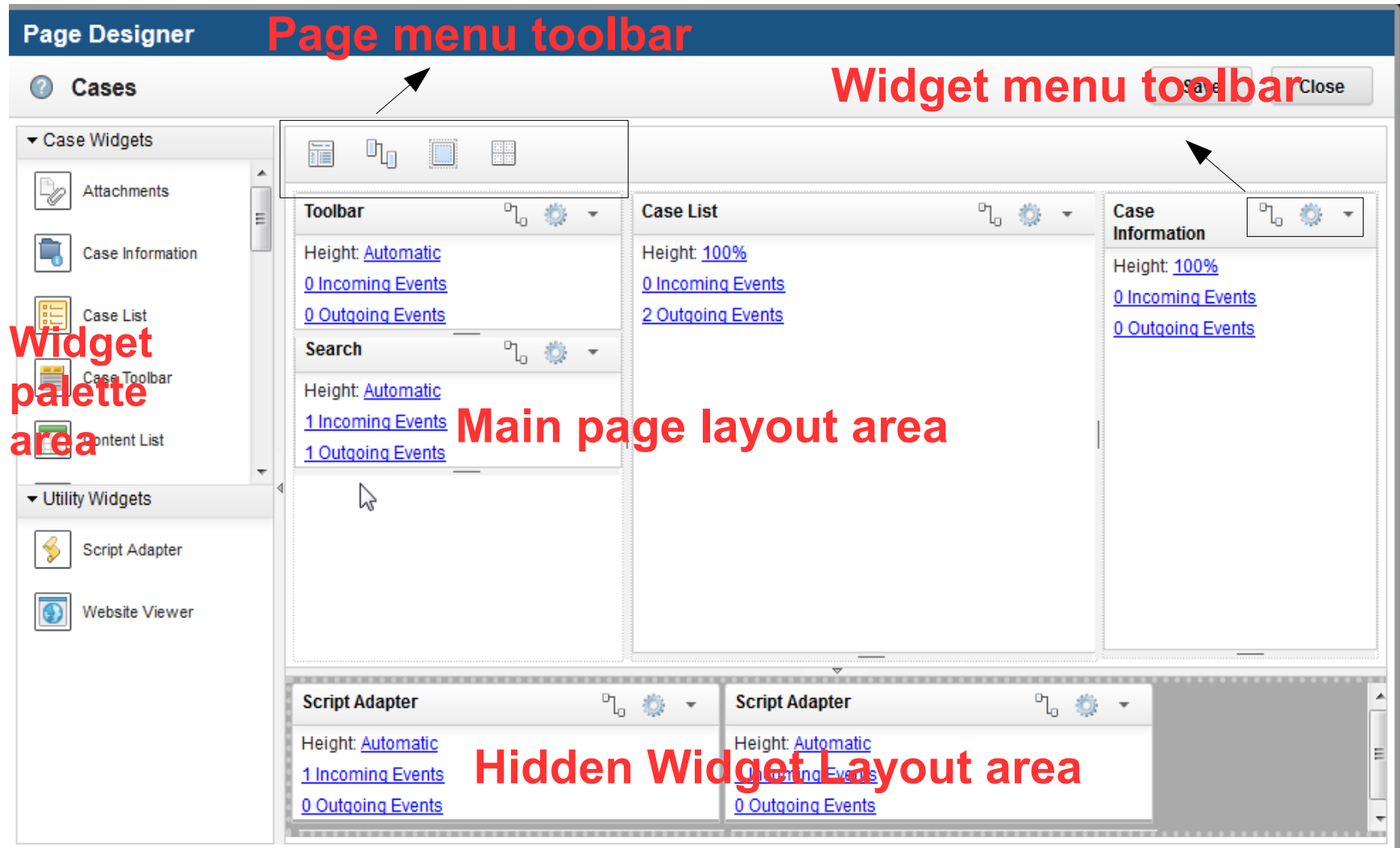
Credit Card Dispute Management | Customer Service Representative

No items to display

Page Designer Overview

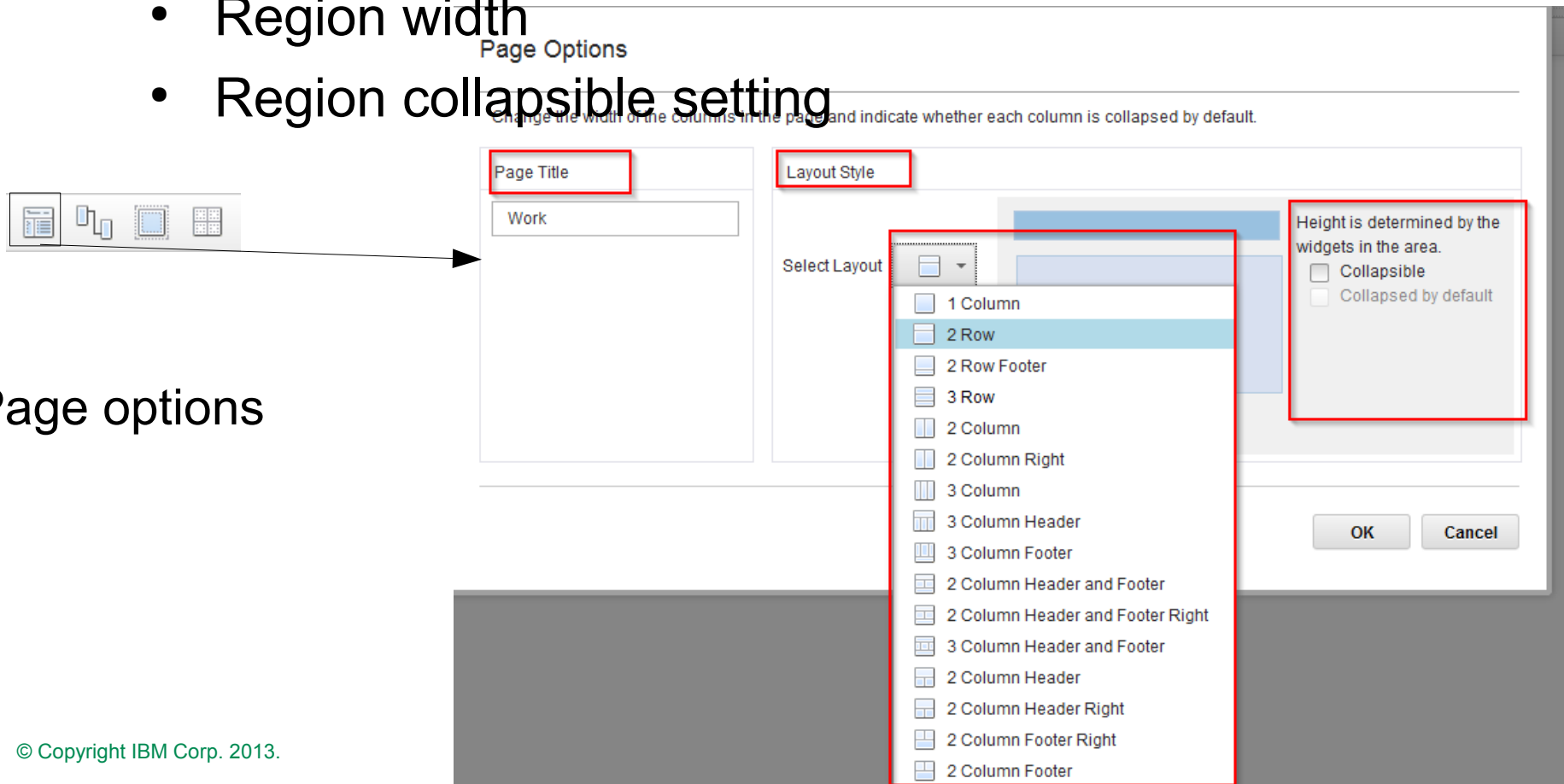
- Page designer tool in Case Builder to design the page
 - Page UI design
 - Page layout design
 - 8 layout types provided in ICM 5.2
 - Additional 8 layouts provided in ICM 5.2.1
 - Layout region design (width in pixel or percentage, collapsible)
 - Page title/Page border
 - Page level event wiring
 - Widget design and configuration
 - Widget position and style
 - Widget properties configuration
 - Event wiring and configuration

Page Designer Overview



Page Function Feature – Page layout options

- Page title
- Page layout: 16 layout types can be used to design a page.
 - Region width
 - Region collapsible setting



Page Function Feature – Other Page Functions

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

The diagram illustrates the functionality of three icons in the top-left toolbar:

- Hidden widget:** An arrow points from the icon showing a grid with a dashed border to a panel titled "Wire Events".
- Page event management:** An arrow points from the icon showing a document with a lightning bolt to a panel titled "Wire Events".
- Page border setting:** An arrow points from the icon showing a grid with a solid border to a panel titled "Wire Events".

The "Wire Events" panel contains the following elements:

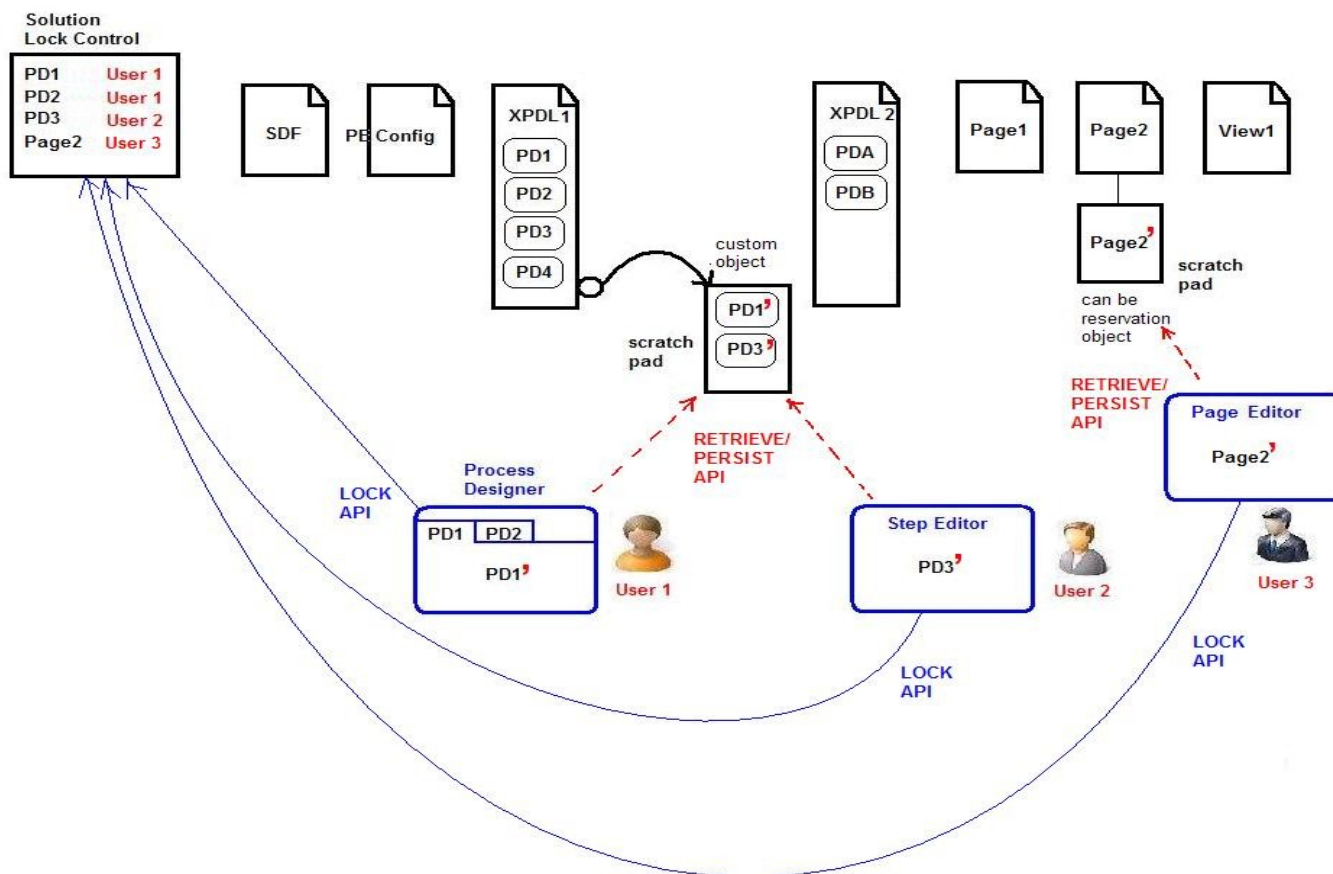
- Widget:** A dropdown menu currently set to "Page Container".
- Event Wiring:** A button labeled "Event Wiring" (highlighted with a blue border) and a button labeled "Event Broadcasting".
- Instructions:** "Add wires to establish communication between widgets. Ar"
- Footer:** "Incoming Events for the Page Container"

Two screenshots of a page editor are also shown:

- Top Screenshot:** A page layout with three columns. The middle column contains the text "Drag and drop widgets into this area." A dashed border is visible around the page content.
- Bottom Screenshot:** A page layout with three columns. The middle column contains the text "Drag and drop widgets into this area." A solid border is visible around the page content.

Multi-user Editing and Deployment

- In Case Builder, multiple Business Analysts and developers can work on the same solution collaboratively
- Solution deployment will use all the latest committed version from multiple BAs/developers



Reset Test Environment and Multiple Project Areas

- In Case Builder, the Reset Test Environment button allows you to reset your environment by going back to the state as if the clean Target Object Store and Region has been just initially configured
 - Deployed solutions and instances are removed
 - Connection Point's region is reinitialized
 - User-defined assets (search templates, form templates, etc.) are deleted
 - Keep a backup of these before Reset !
 - (Solution designs remain in the Design Object Store / Case Builder)
- Use Case Manager Administration Client to set up multiple project areas
 - Business Analyst groups/users can be assigned to project areas and own it
- Resetting a test environment applies only to one project area.

Questions

