Business Partner Field Enablement Workshop

IBM Case Manager 5.2.1 New Feature Overview

ICM 5.2.1

Include Content From Other Repositories

Include External Data in Property Views

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File Tracking, Favorites and Desktop Sync

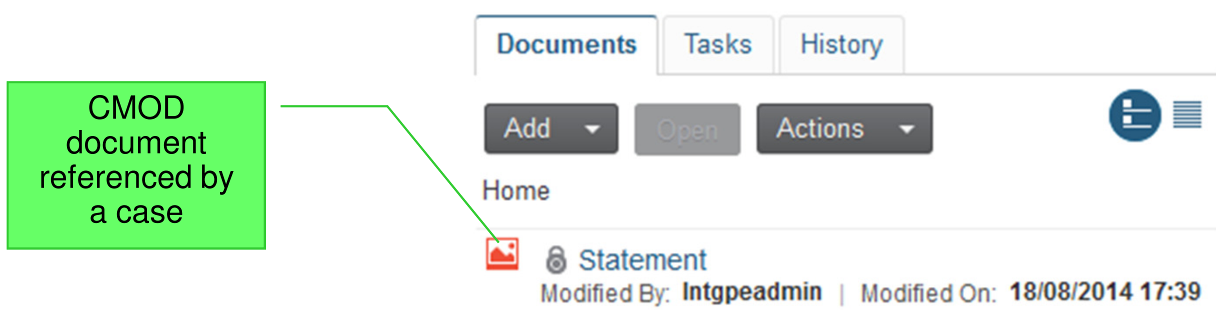
Expanded Platform Support

Include Content From Other Repositories

- General Use Case
  - *Many organizations store their documents in multiple repositories*
  - *This is often due to:*
    - *Specialized storage such as IBM CMOD*
    - *Departmental partitioning*
    - *Mixed vendor products*
    - *Legacy repositories still in use*
  - *Cases often contain an aggregation of documents from many sources*
- Specific Use Case
  - *A banking customer opens a credit card dispute case*
  - *The case contains a scan of the customer's invoice*
  - *It also includes the customer's credit card statement that resides in CMOD*
  - *Case knowledge workers can interact in the same way with both these documents regardless of their actual source*
  - *External documents do not need to be copied (duplicated) into the case*

Include Content From Other Repositories

- From Case Builder, a Solution Creator can
  - Mark a case type as allowing external documents to be filed or added as attachments
- From ICN Admin, an Administrator can
  - Configure a Desktop to include the repositories where users can file external documents from – including all repository types supported by ICN (CM8, CMIS, other P8 object stores, CMOD)
- From Case Client, a Case Worker can
  - Search for documents from another repository to add them to the case or attach to a workflow
  - Interact directly with the document, such as modifying properties, viewing the content, versioning, and interacting with the document as an attachment

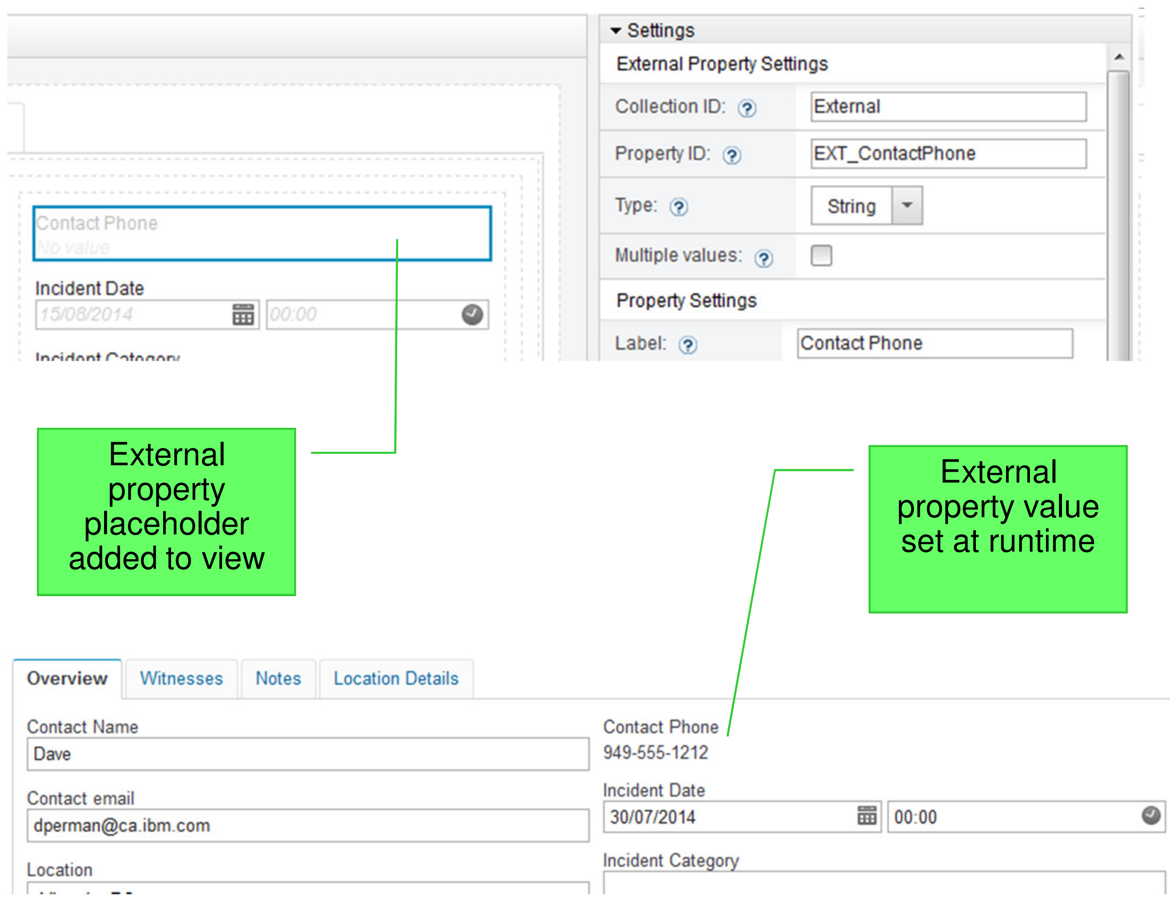


Include External Data in Property Views

- General Use Case
  - *Most organizations maintain several "systems of record" data sources*
  - *These data sources often contain the most current "single source of truth"*
  - *Easy access to this information helps case workers complete their work*
  - *It is often necessary, and efficient, to access this data live and not store a copy*
- Specific Use Case
  - *While working a claim for a customer, an agent opens the case details*
  - *Along side the claim specific data, the agent sees the customer's contact information, pulled live from their client database*
  - *A list of past transactions is also conveniently displayed, saving the agent from having to access another system*

Include External Data in Property Views

- Placeholder added to a property view
- A script is added to the page that gets data from another system based on one of the existing case properties
- The returned data is mixed into the view with the case properties
- The external property is never persisted with the case data itself and is always accurate
- External properties can be both read-only and read-write

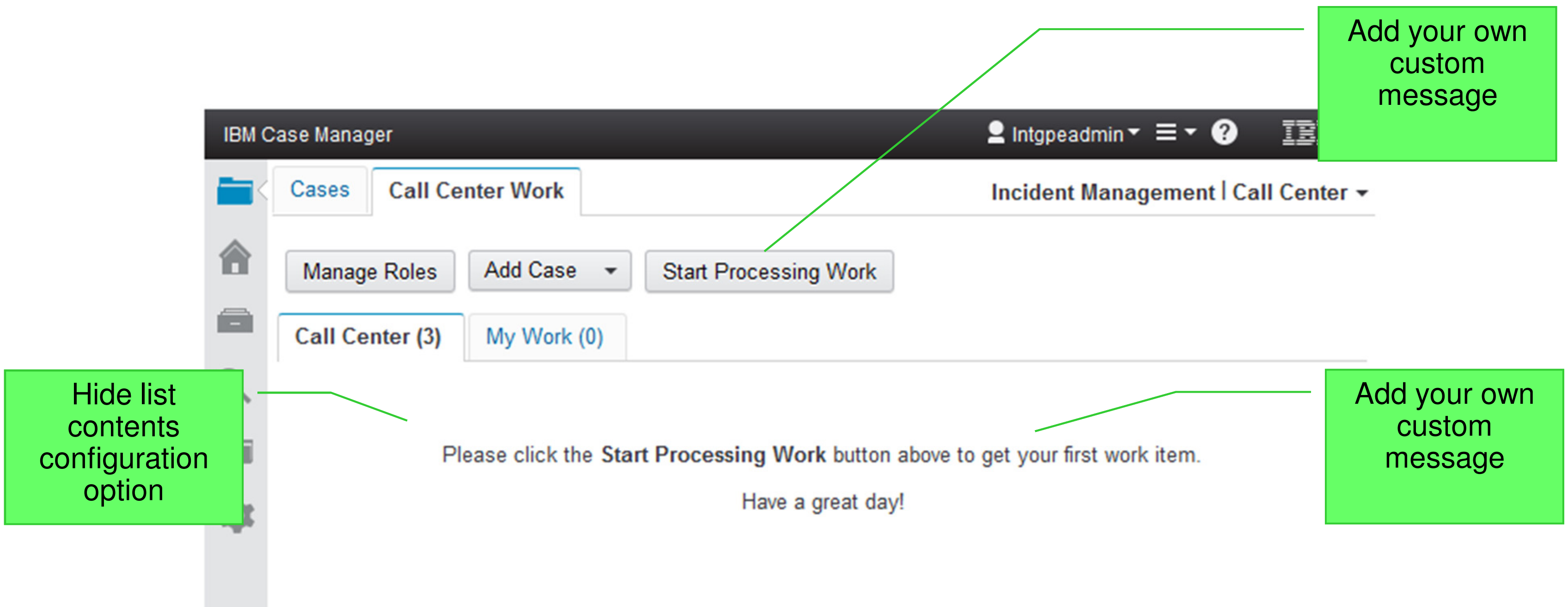


Push In-baskets

- General Use Case
  - *Teams of heads down task workers process items from shared queues of work in support of driving a case to completion*
  - *Some of these workers may decide to open items of lower priority or ones that, from their experience, are easier to complete*
  - *Hiding the list of items and delivering them in a prioritized way ensures work is being performed in an optimal way*
- Specific Use Case
  - *An insurance claims processor's performance is measured by number of claims they review*
  - *Experienced processors are able to recognize claims that typically take longer to process*
  - *Providing a simple "get next" button that hands out the next item in the sorted queue ensures an even distribution of work*

Push In-baskets

- Work items are not shown in the in-basket
- Users click a button to start processing work
- Ordering of delivered items is controlled by in-basket configuration
- Works in conjunction with the step's "Get next" feature

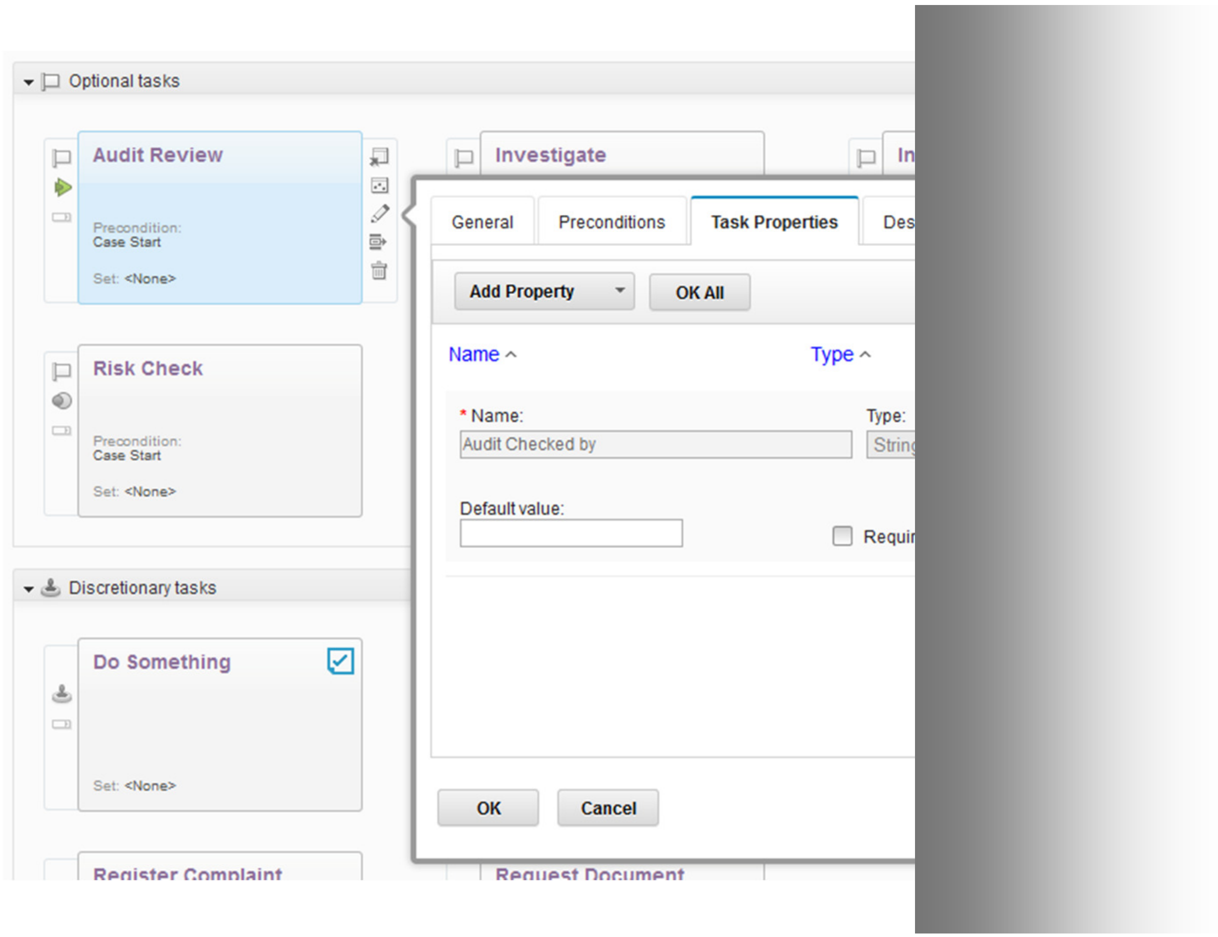


Task Properties

- General Use Case
  - *Case tasks, particularly ones that might repeat, may need to capture and store data specific to that task for reporting or auditing*
  - *Various complex workarounds were often used, resulting in the data being persisted in unique ways*
- Specific Use Case
  - *A repeatable task is used to automate the arrival and review of documents added to the case folder*
  - *During the review steps, some information about the document is entered in task property fields that are displayed to the end user*
  - *When the task and its workflow complete, the data is already stored with the task object with no additional development work required*

Task Properties - Design

- Can be added to any task type
- Add to property views like any other case or workflow data field
- Task property data can be accessed in Process Designer using the `F_CaseTask.taskProp` notation in pre or post assignment expressions

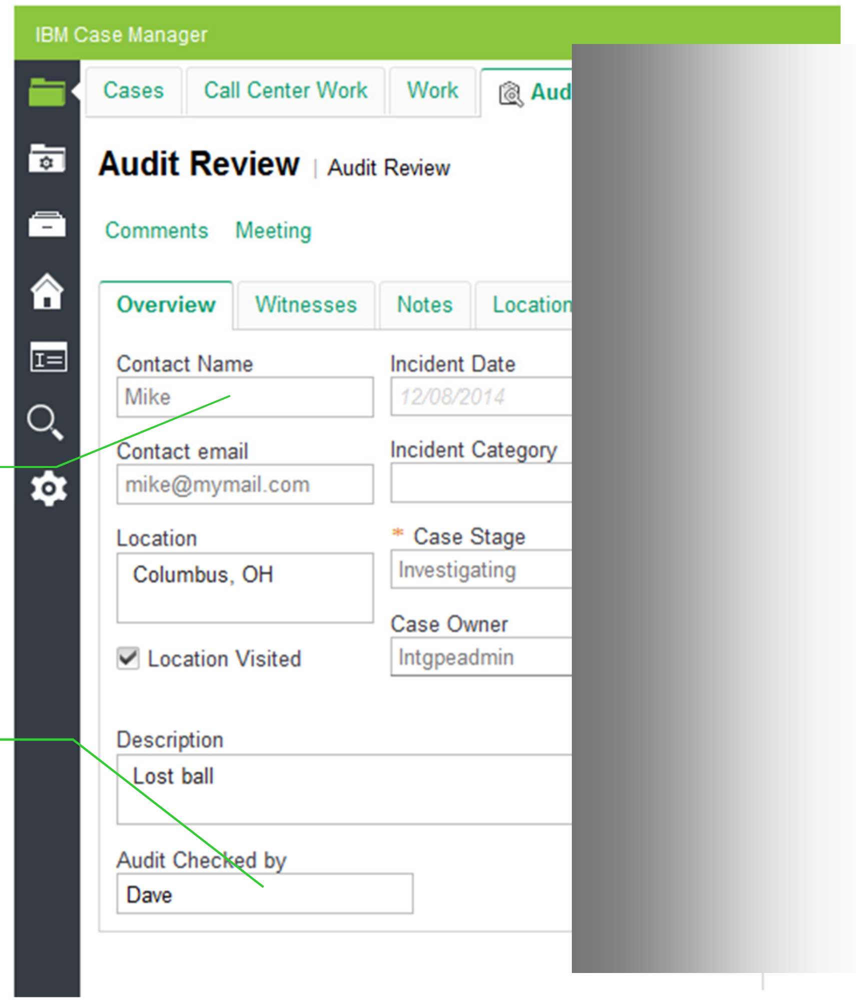


Task Properties - Runtime

- Displayed in any property view as designed along with other case properties or workflow data fields

Case properties stored on the case folder

Task property stored on the task instance

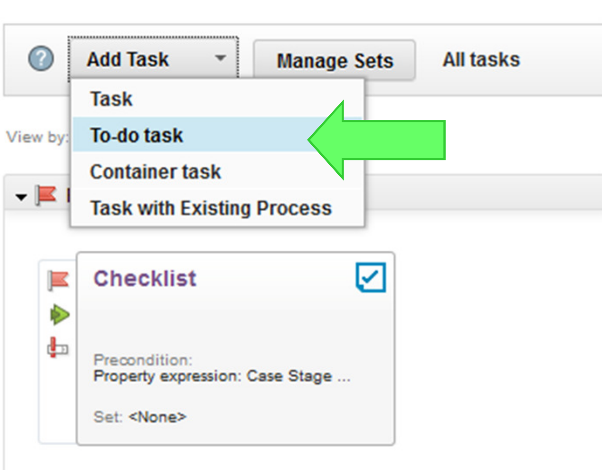


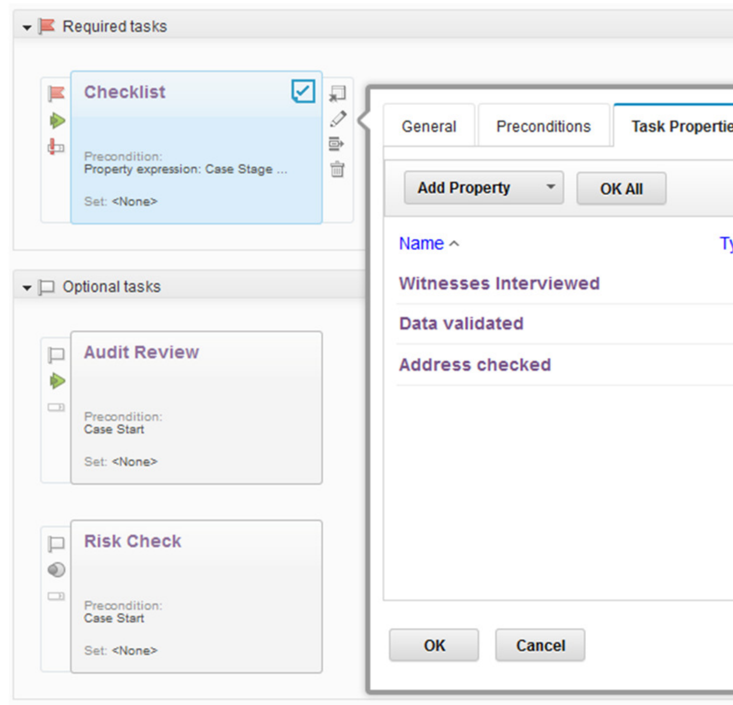
To-do Tasks

- General Use Case
  - *Cases typically have a set of things that need to be done to successfully move a case to completion*
  - *Some of these things can be as simple as "check that a specific document is included"*
  - *These "to-do" items require no workflow behind them*
  - *They simply need to be easily visible and available when viewing the case*
  - *You do want to be able to control when certain to-dos are visible or required*
  - *You also want to track in the case's history when a to-do was completed and by whom*
- Specific Use Case
  - *When an incident case type specifies that the incident type was an accident, a set of extra data is required to capture things like "Was there a witness?", "Was the accident site visited?", etc*

To-do Tasks - Design

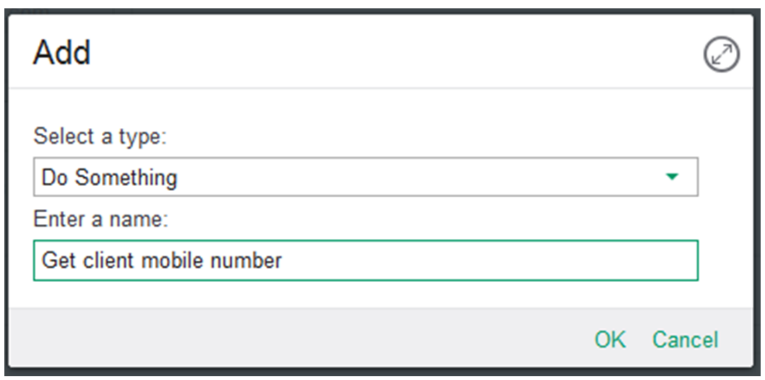
- Created like any other task type
- Supports automatic and discretionary modes
- Uses task properties to store any optional data captured as part of the to-do task
- Does not have underlying workflow

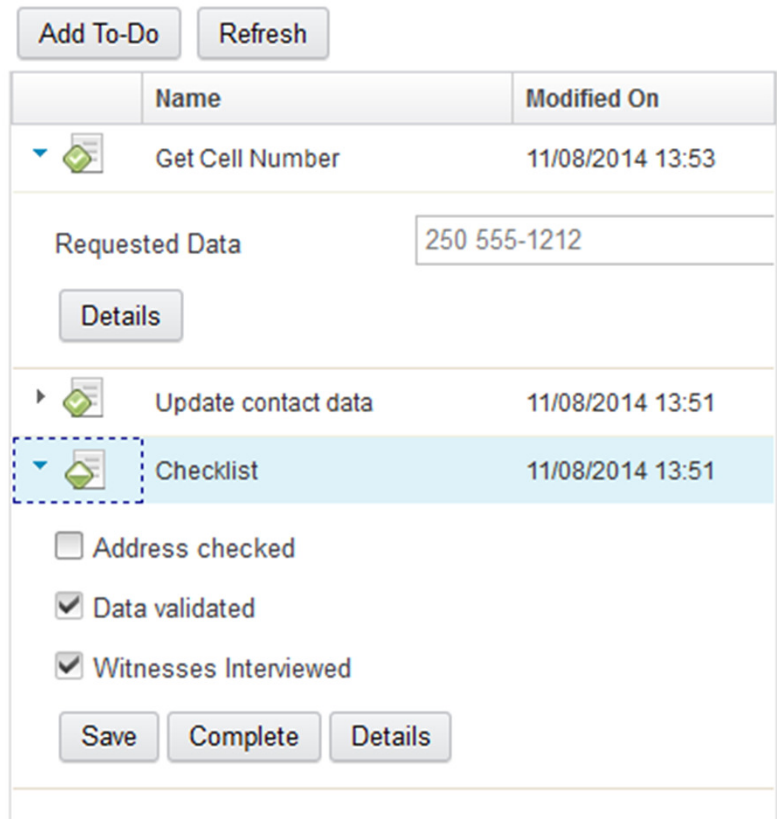




To-do Tasks - Runtime

- To-do tasks are displayed in their own To-do widget
- Customizable actions allow saving, completing, disabling, and enabling To-do items
- Case workers can add To-do items on the fly



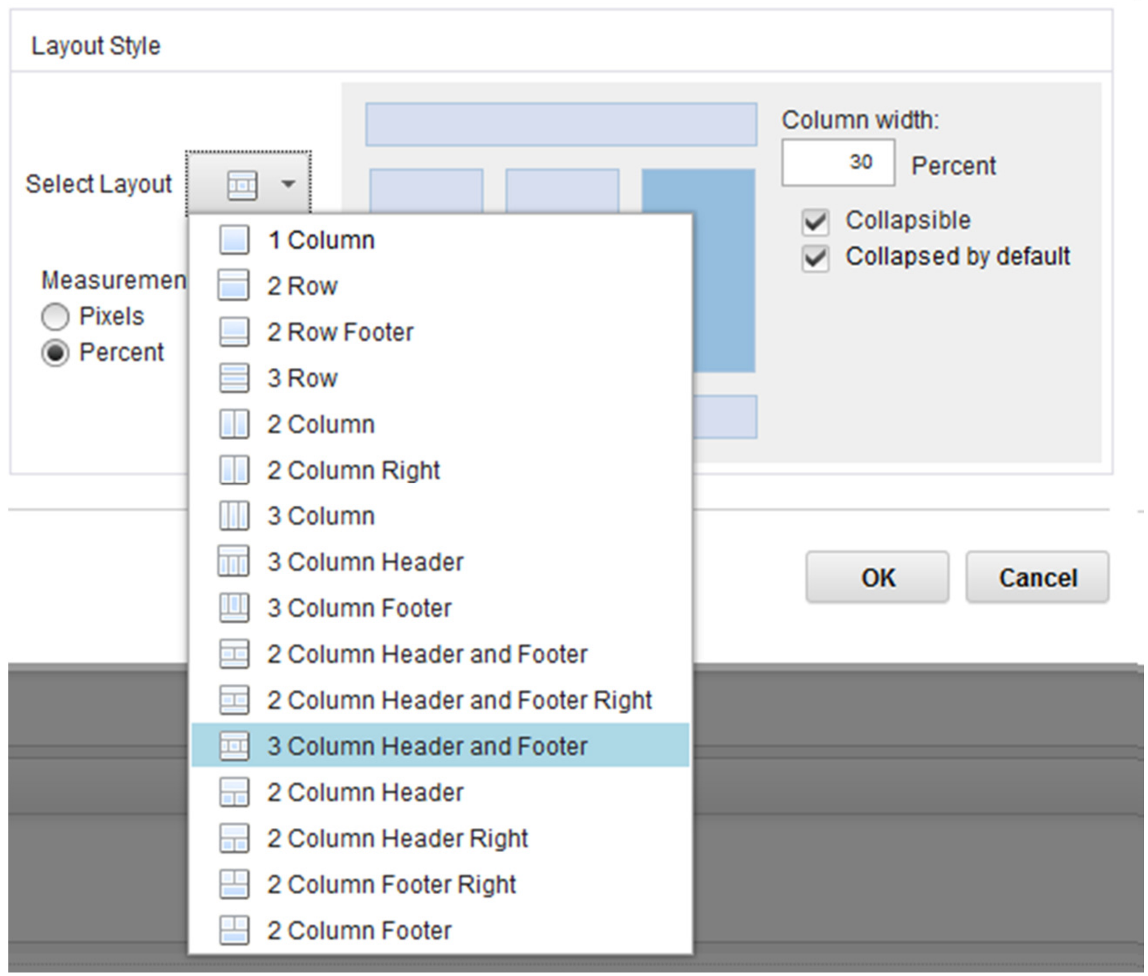


Additional Page Layout Configurations

- General Use Case
  - *For solutions that require UIs with many out-of-the-box or custom widgets, flexible page layouts are key to ensuring case data is presented in an efficient, intuitive way*
- Specific Use Case
  - *Create a two column layout for the work page with the In-basket on the left and a collapsible Case Information widget on the right*

Additional Page Layout Configurations

- Provides eight additional layout combinations
- Supports collapsible left/right columns, headers and footers
- Collapsible columns can be shown/hidden with a simple wiring event



New APIs for Creating Custom Data Editors

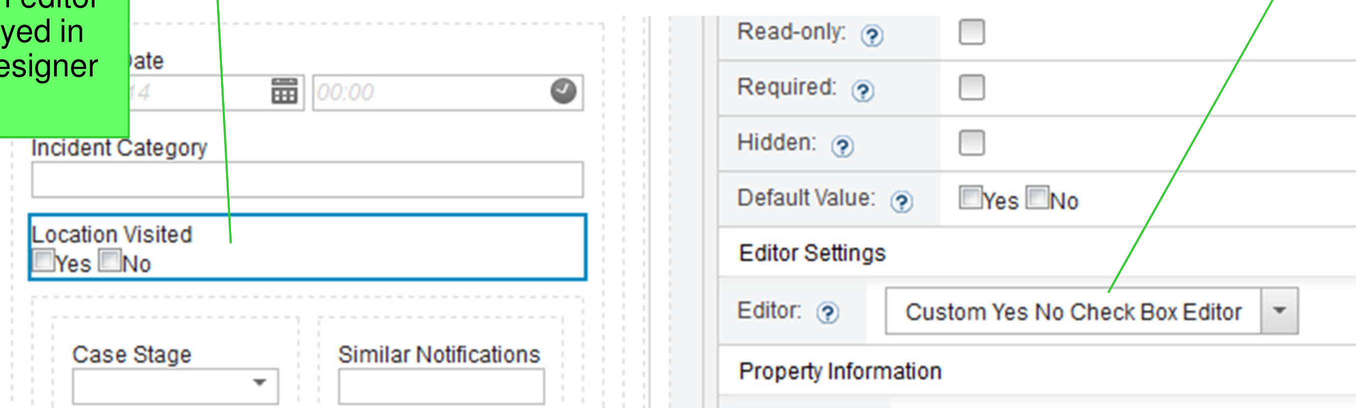
- General Use Case
  - *The ICM user interface includes several standard controls for entering case data of various data types*
  - *Some solutions may require various specific controls that help users enter the correct values*
- Specific Use Case
  - *A case solution has a boolean property that can be used to enter values like "Yes/No", "True/False", checked / unchecked*
  - *These values can often contain a third state; that being "I have not answered this yet"*
  - *A more explicit control is needed to clearly indicate this potentially ambiguous state*

New APIs for Creating Custom Data Editors

- Custom property editors can be created as Navigator plug-ins
- They provide not only custom UI for a property, but optional configuration settings for that UI
- They are registered into ICM using a CMAC task
- Once registered, they appear as additional choices for a property editor

Custom editor displayed in view designer

Custom editors are registered once and available for any solution

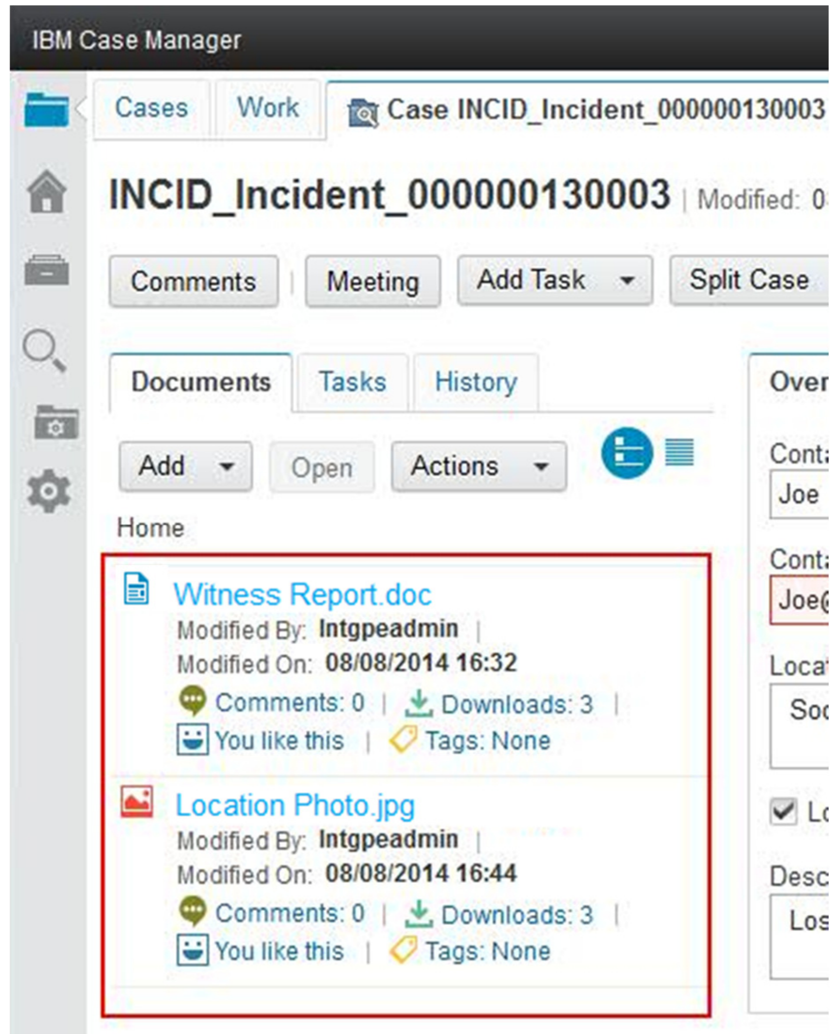


Social Information for Case Documents

- General Use Case
  - *When collaborating on a case with a team of knowledge workers, it is often helpful to know when case documents have been downloaded or liked*
  - *Tagging provides a quick way of categorizing related documents; making them easier to find later*
- Specific Use Case
  - *A case worker has added a set of documents to a case folder*
  - *Over the next several days, the worker is able to see who downloaded the documents, who liked the content, and tag it with keywords that can help other users of the content locate it quickly*

Social Information for Case Documents

- Social information like comments, tags, likes and download counts are maintained natively in an object store by the Content Platform Engine.
- This information is optionally displayed directly in the document magazine view or in a document's property page



Zero Download Viewer Support

- General Use Case
  - *Viewing a document that resides in a content repository used to require an initial acceptance and download of a large viewer java applet*
  - *Although feature rich, the viewer applet may not be required by all users*
  - *The viewer applet may also not be supported on all user devices*
- Specific Use Case
  - *A case folder has a spreadsheet document filed in it that a user needs to review quickly*
  - *When they click the document, it is rendered on the server and quickly delivered to the case's Viewer widget*
  - *No long applet downloads or startup is required to view the spreadsheet*

Zero Download Viewer Support

- ICM Viewer page widget now supports the new Navigator zero download document viewer
- Documents that are part of a case can be viewed directly on the page without requiring a download of the viewer applet
- Documents of many formats are rendered quickly on the server and delivered for viewing to the client

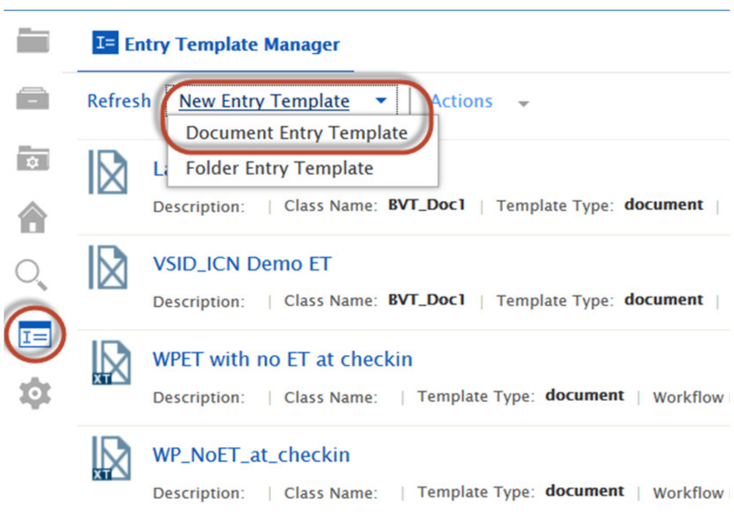
Office document rendered on server and displayed in the ICM Viewer widget

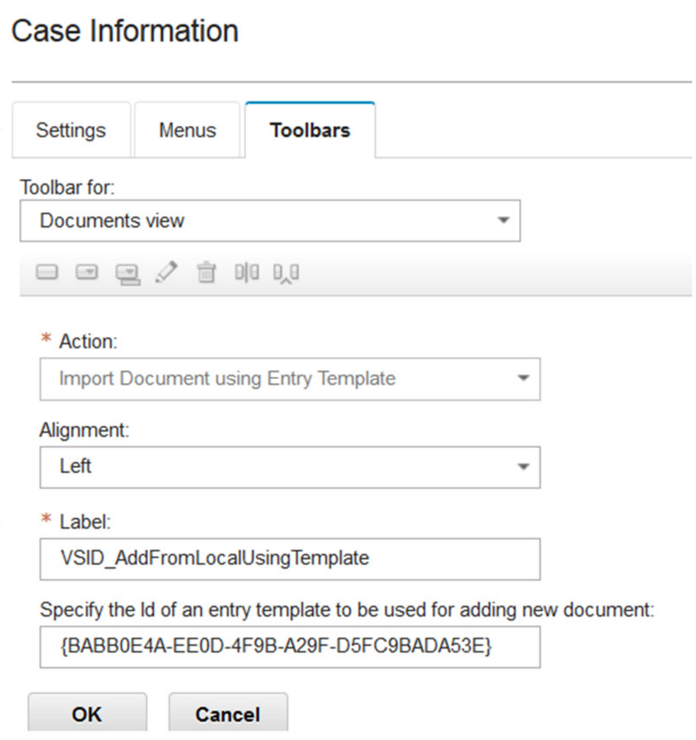
Add Case Documents With Entry Templates

- General Use Case
  - *Adding documents into a content repository can often be time consuming and confusing if doc class, doc properties, and security is required*
  - *A user must also know to select the correct document class in the first place*
- Specific Use Case
  - *A user is adding an incident report document into their case*
  - *The solution has a document class defined for that type of document that includes several pieces of meta data that need to be entered by the end users*
  - *An Entry Template is created that uses the case's incident report doc class*
  - *It also sets default security and predefines any default meta data values*
  - *An ICM toolbar button or menu named "Add Incident Report" is added to the case details page using ICM's new Entry Template action*
  - *The user is now taken directly into the correct Entry Template, reducing clicks and the chance of error*

Add Case Documents With Entry Templates

- Navigator 2.0.3 has a new Entry Template design feature
- In ICM, a new menu action allows you to invoke the Entry Template and also have the resulting document filed in the case





File Tracking, Favorites and Desktop Sync

- General Use Case
  - *Working with documents that reside in a content repository often requires extra user actions*
  - *Users would like to streamline the number of clicks needed, while still benefiting from an ECM environment*
- Specific Use Case
  - *A user checks out and downloads a document from a case that they are going to edit on their local machine*
  - *The system remembers where they like to keep their downloaded files*
  - *When the user checks the file back in, the system remembers where the document was downloaded and does not make you search for it*
  - *When a user is actively working on a set of favorite files, the system can keep the online and offline files automatically synchronized so the latest version is always available in both places*

File Tracking, Favorites and Desktop Sync

- File Tracking and desktop synchronization are part of the new Content Navigator 2.0.3 release and available to Case Manager which is built on the Navigator framework
- There is a new ICM menu action that allows you to identify case documents, folders, and from the Case List, the entire case folder itself as Favorites
- Once in the Navigator favorites, the user can configure synchronization