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:

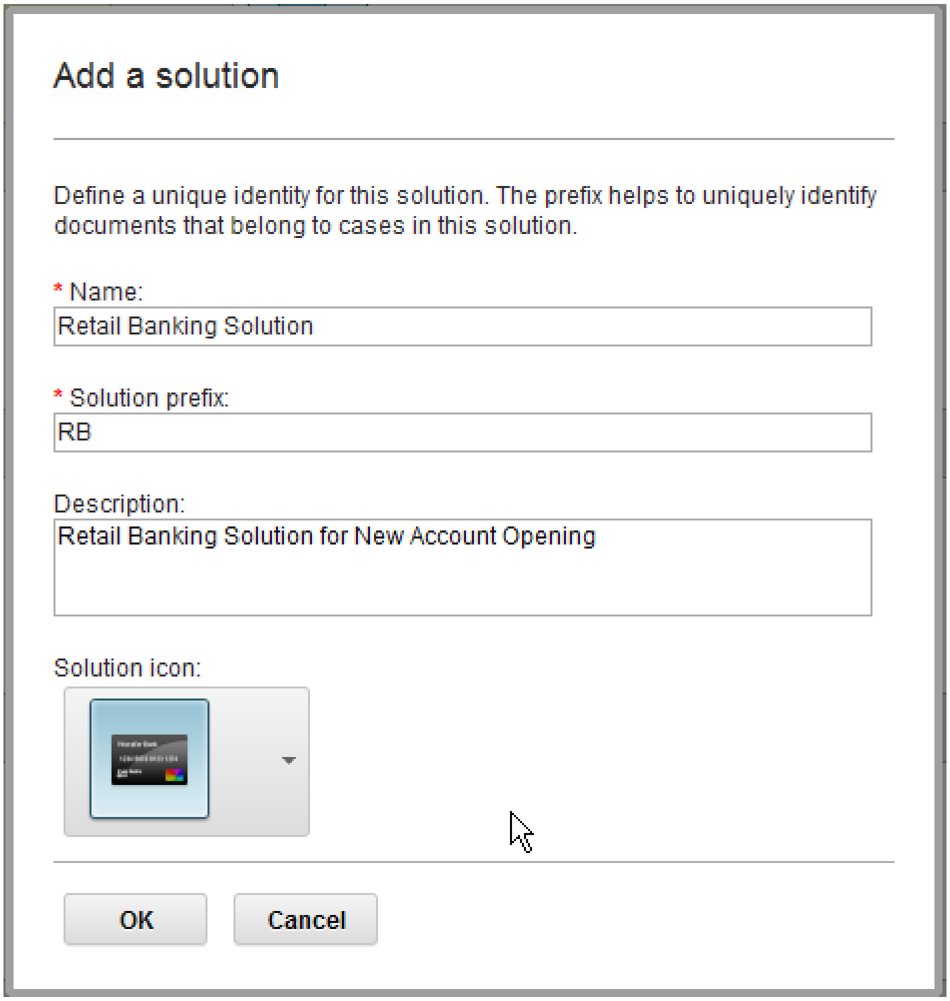
- The New Account Application Form
- A recent photo
- A signature card
- A proof of address (Driver's License or Passport)

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:



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

Add Case Properties

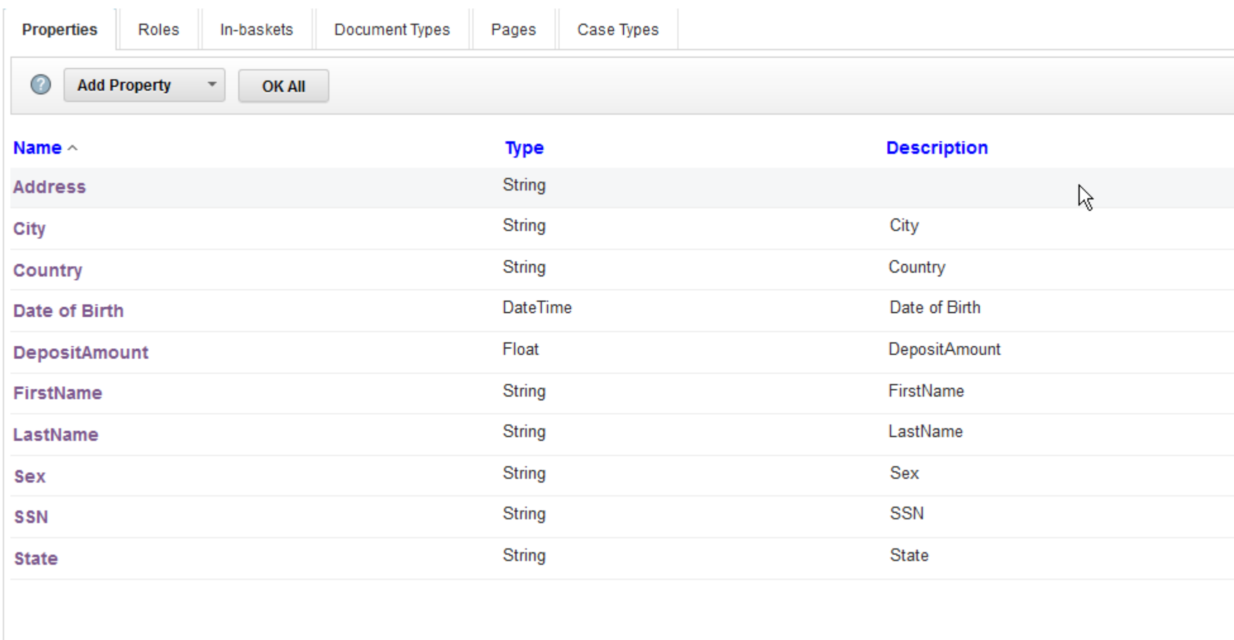
- Click on the Properties tab, then Add Property, and New

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

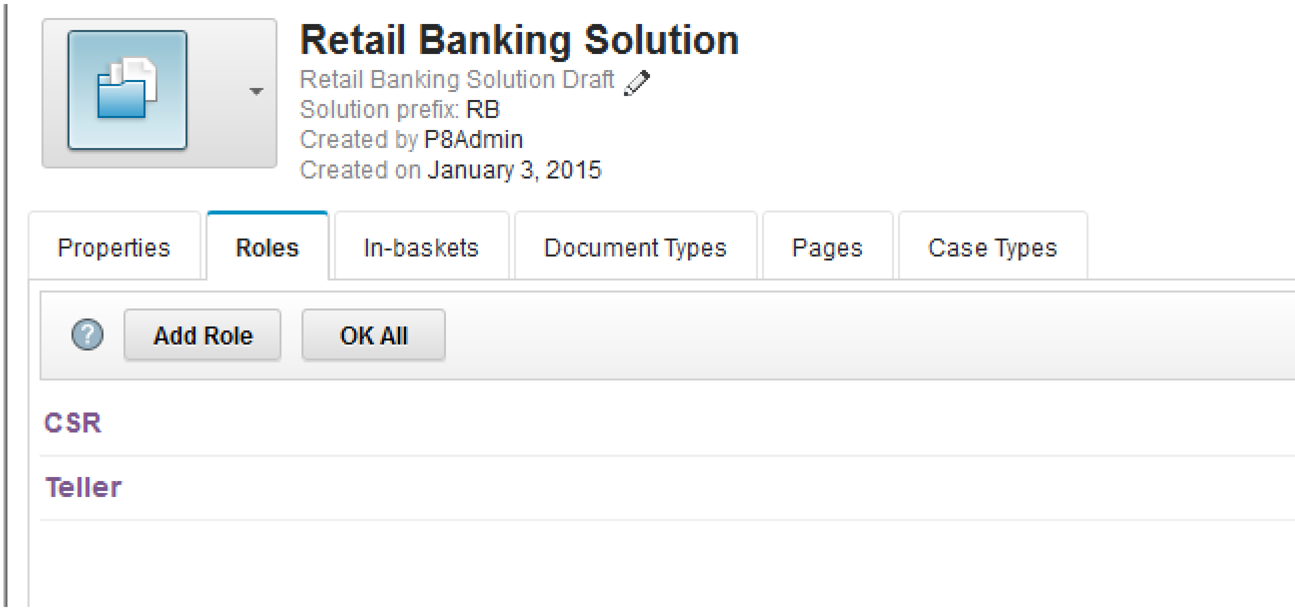
Click OK All. The resulting properties should look like this:



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.



- Click "OK All"

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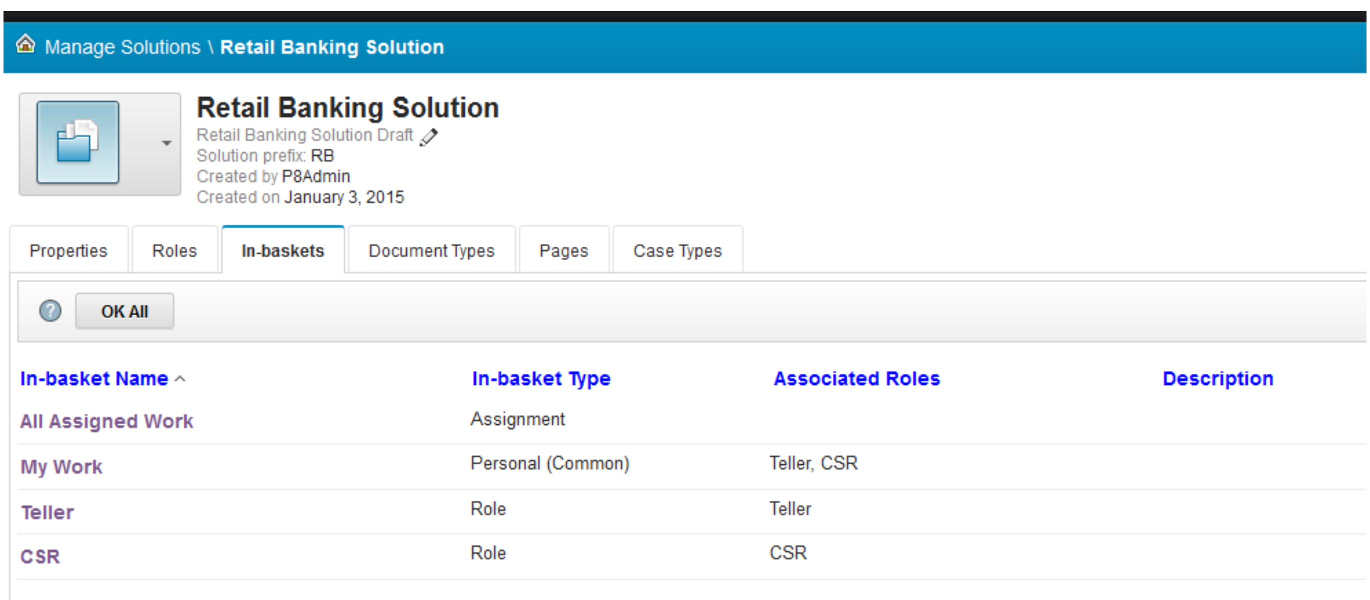
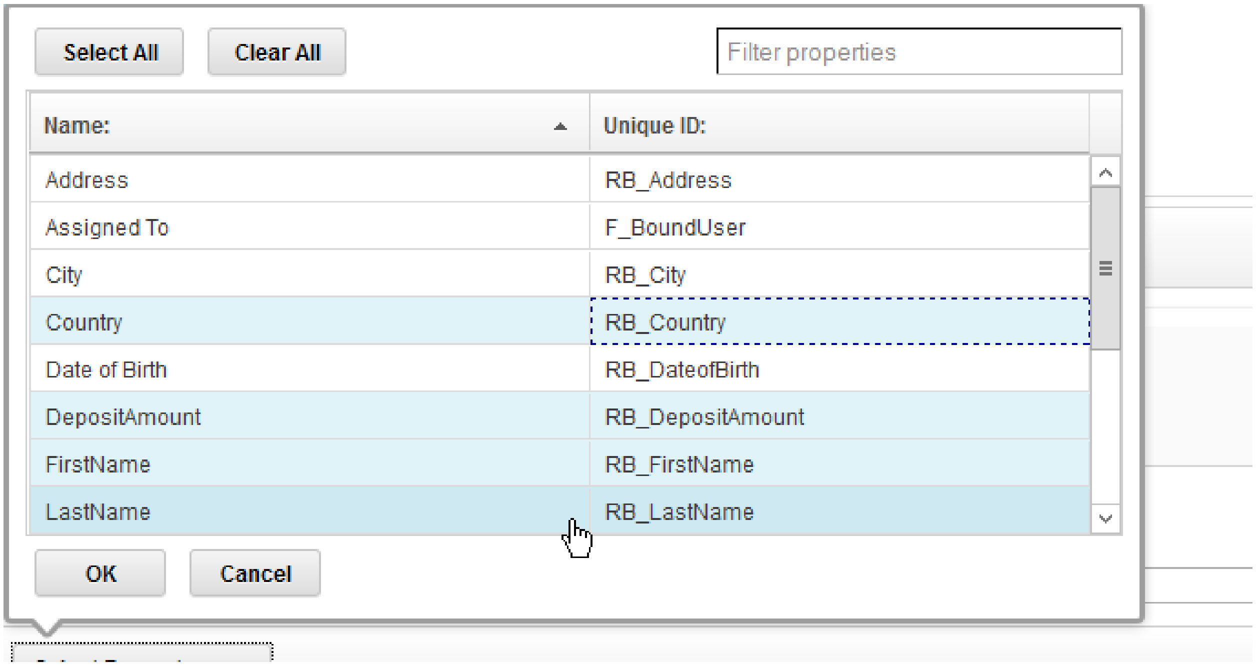
Check In-baskets

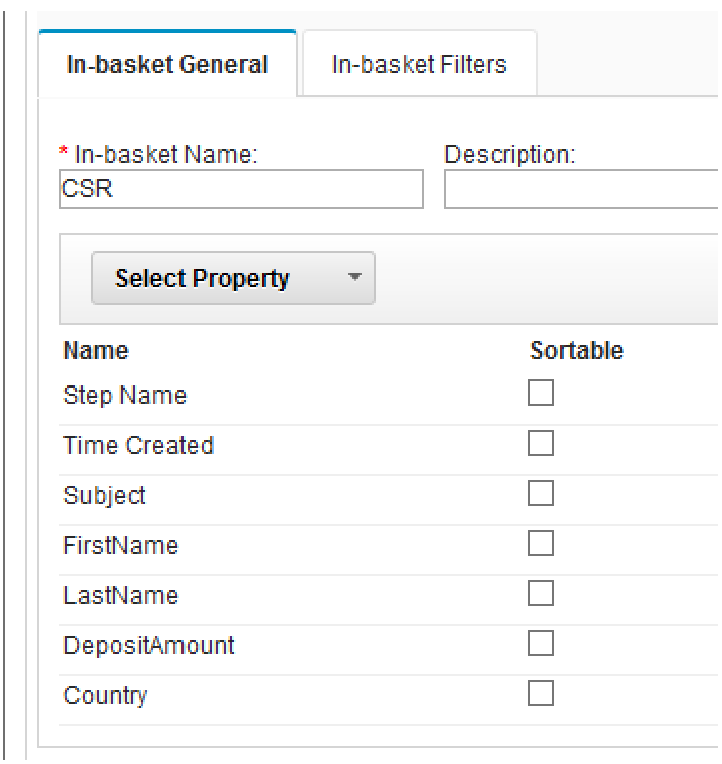
- Click on the In-baskets tab
- Notice that the associated roles have corresponding In-baskets configured.



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

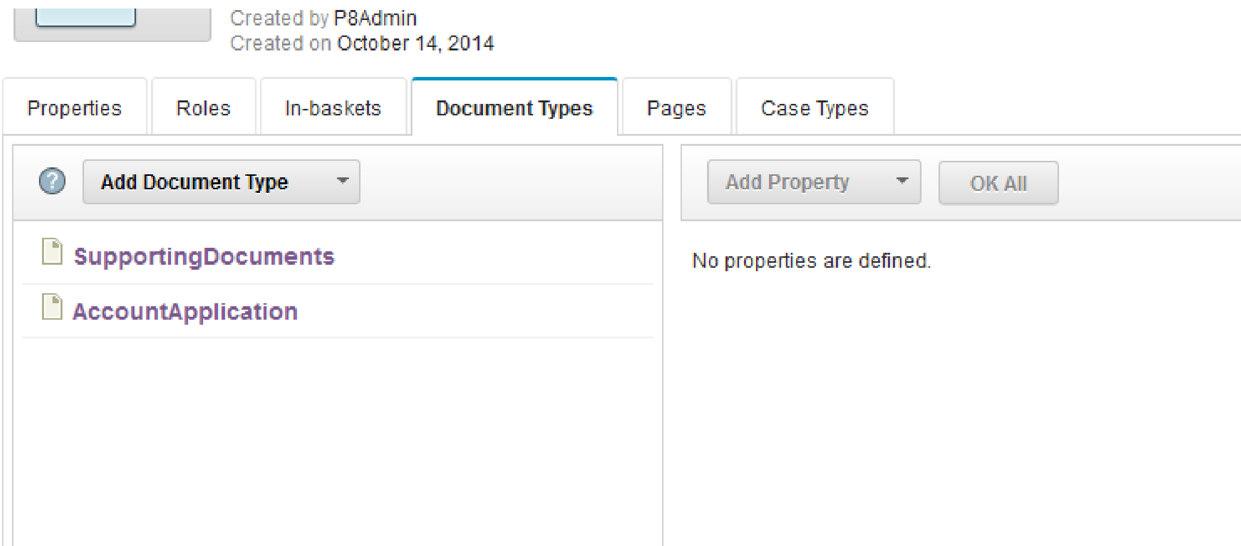


- Rearrange the columns: FirstName, LastName, DepositAmount and Country should be after the Subject



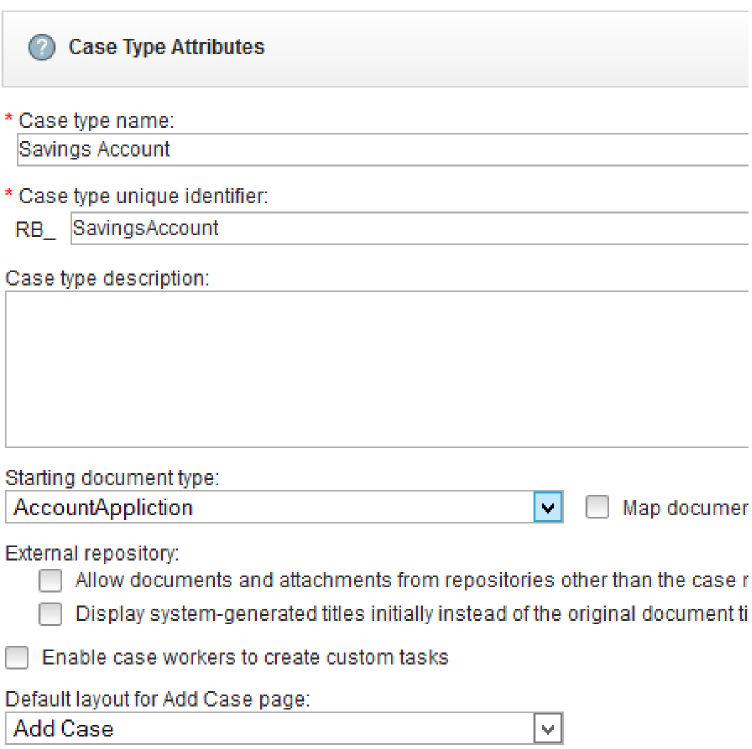
Create Document Types

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



Create Case Type

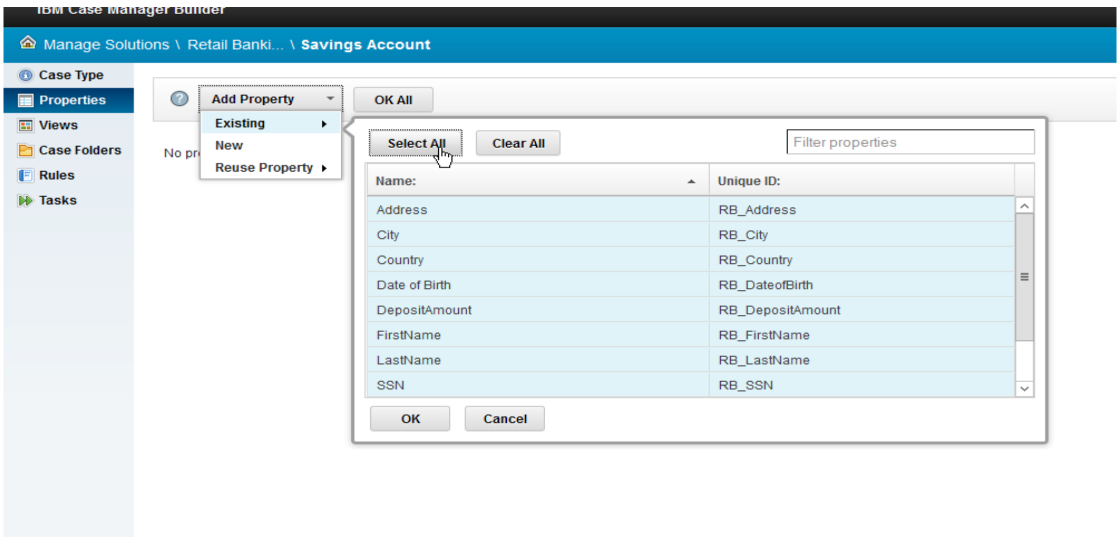
- Click on the Case Type tab. Create the following Case Type by clicking on Add Case Type and entering the details as shown below:



- 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.



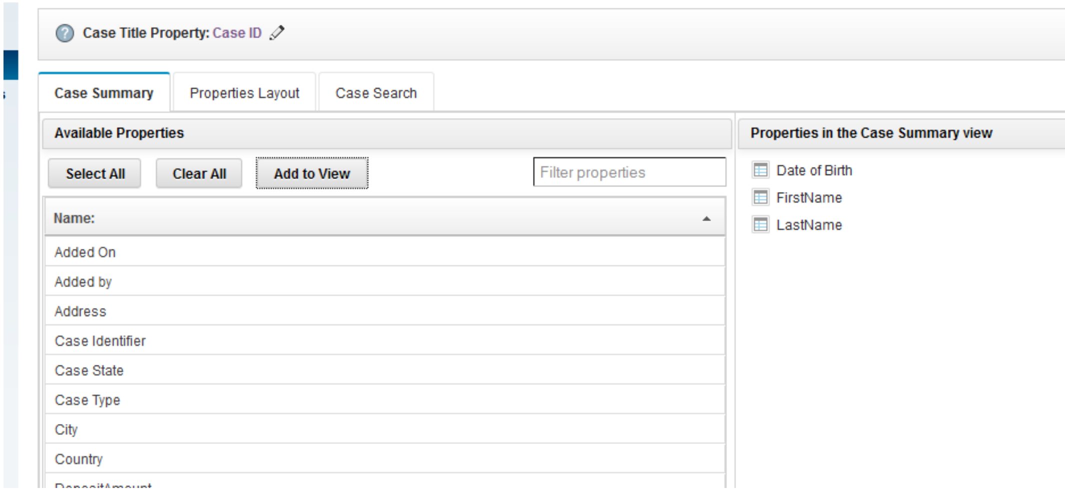
- After all the properties are presented, click the OK All button.

Views

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

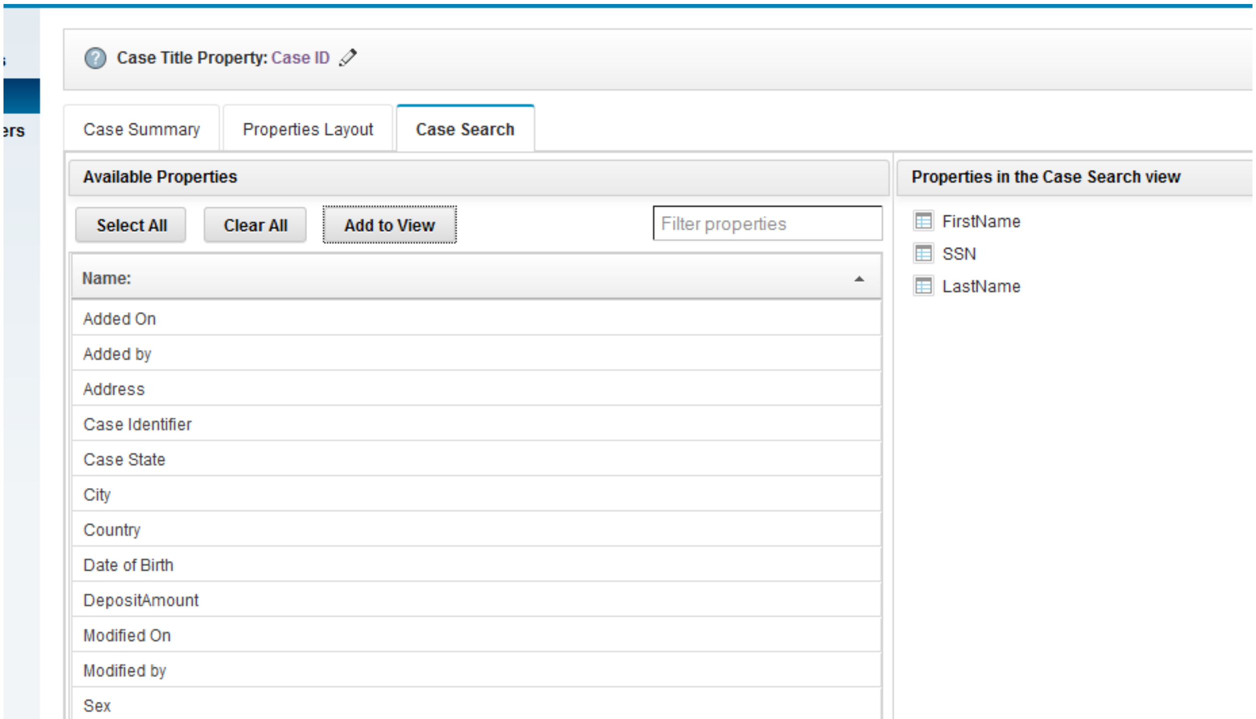
Case Summary

- 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:



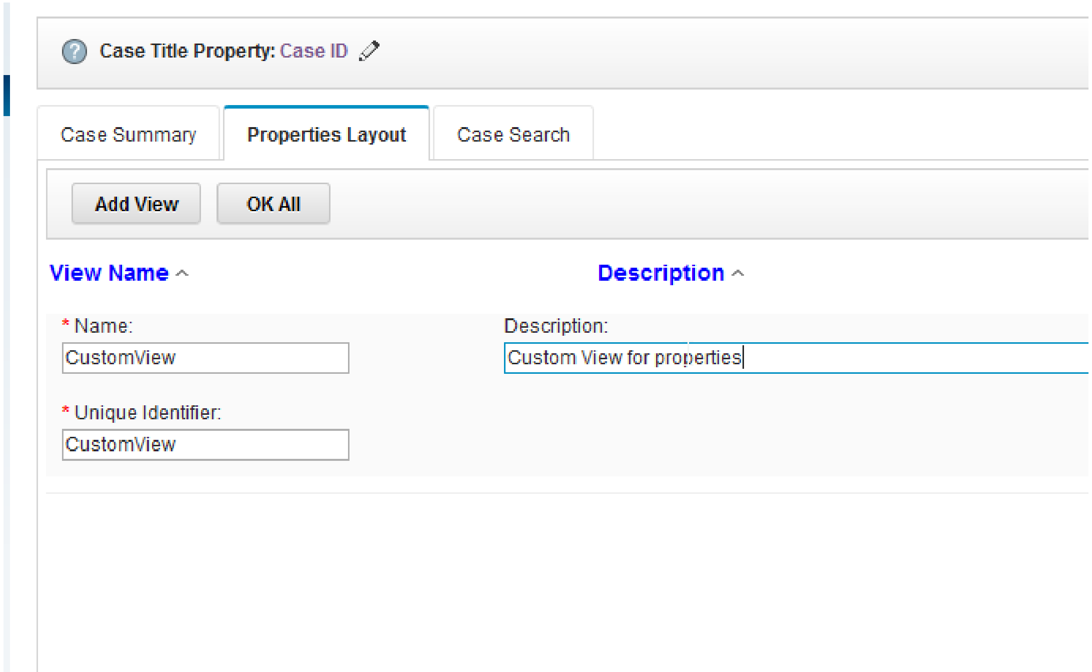
Case Search

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

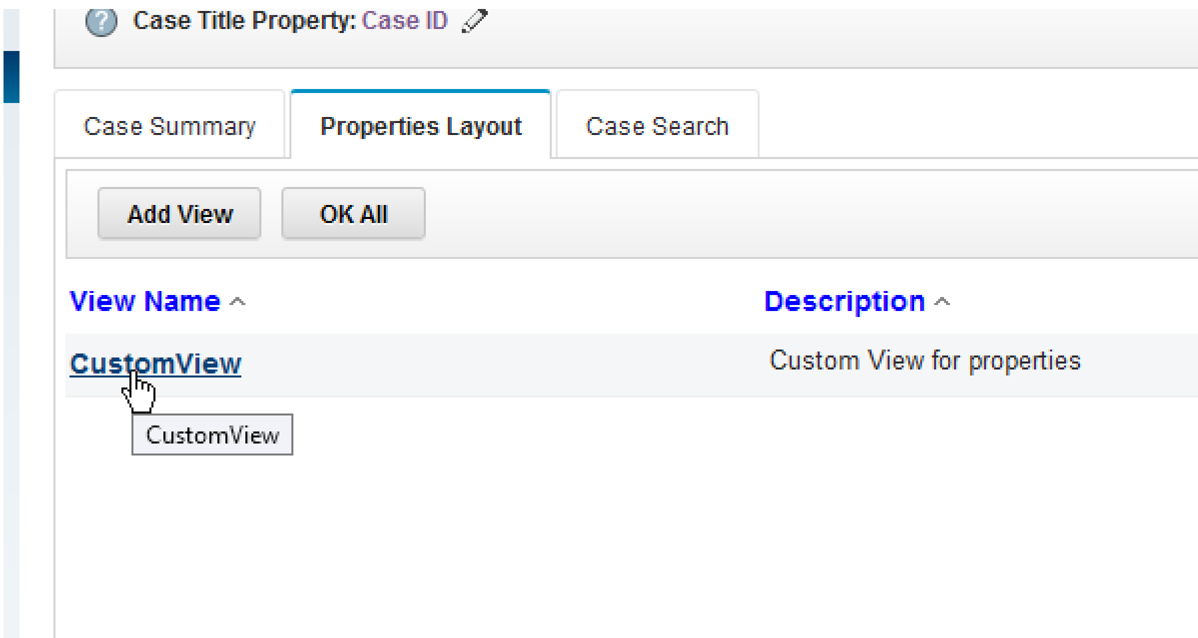


Properties Layout

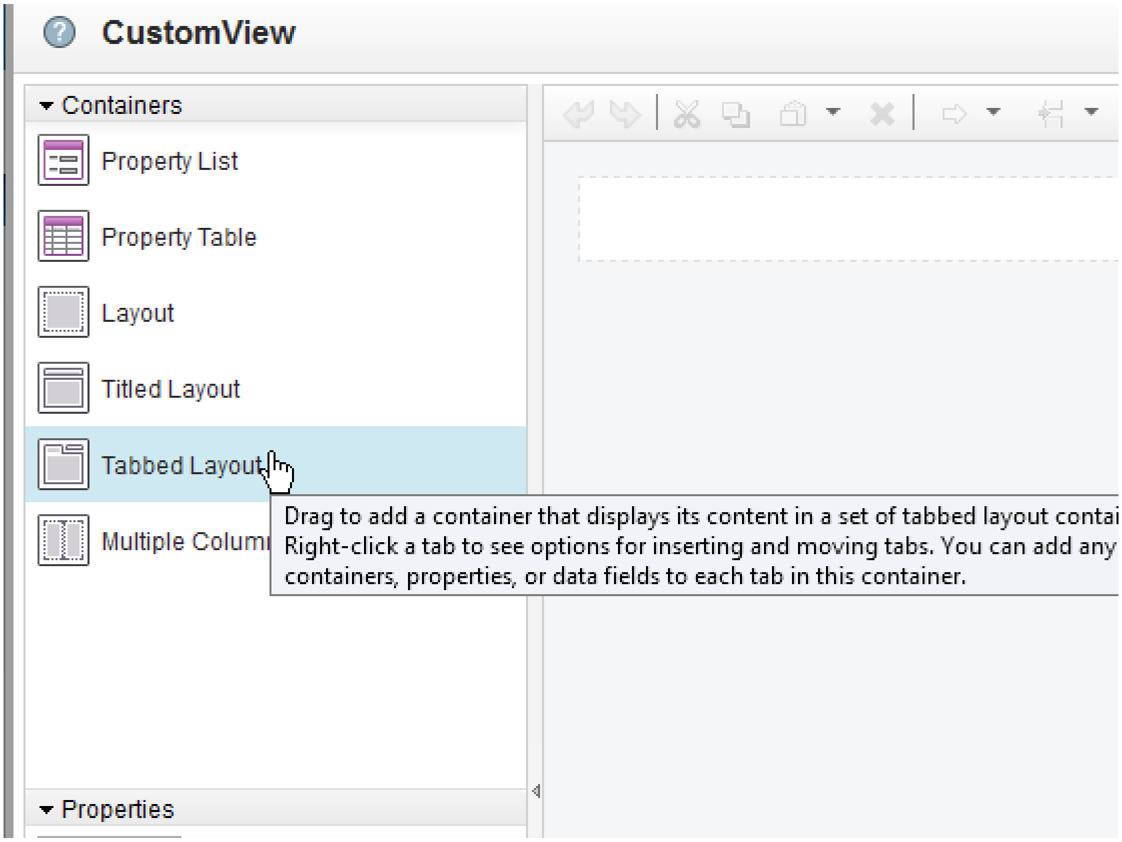
- Click on Add View to create a new layout view for arranging the case properties as shown below:



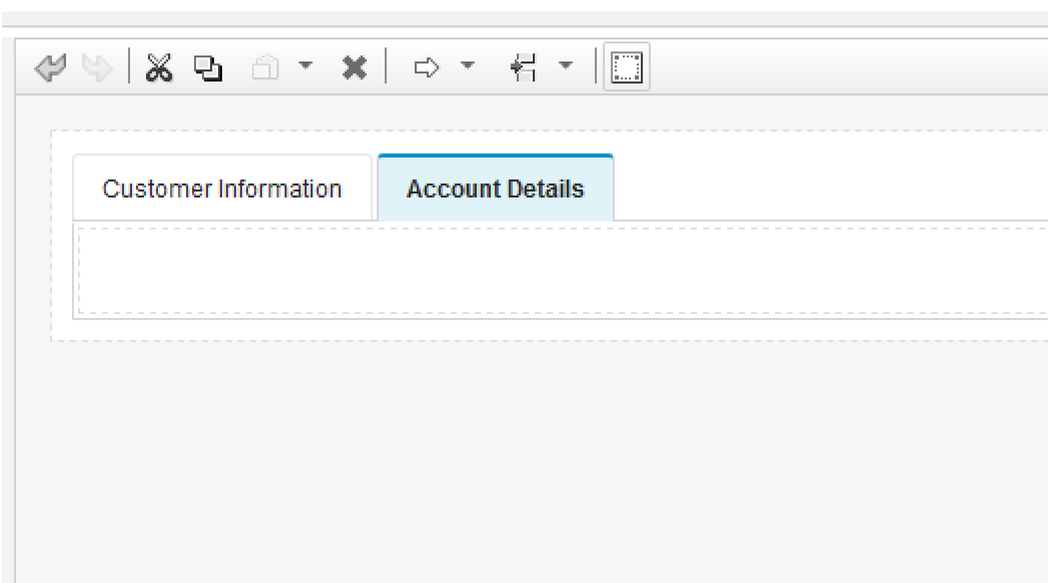
- Click Ok and then open the CustomView layout.

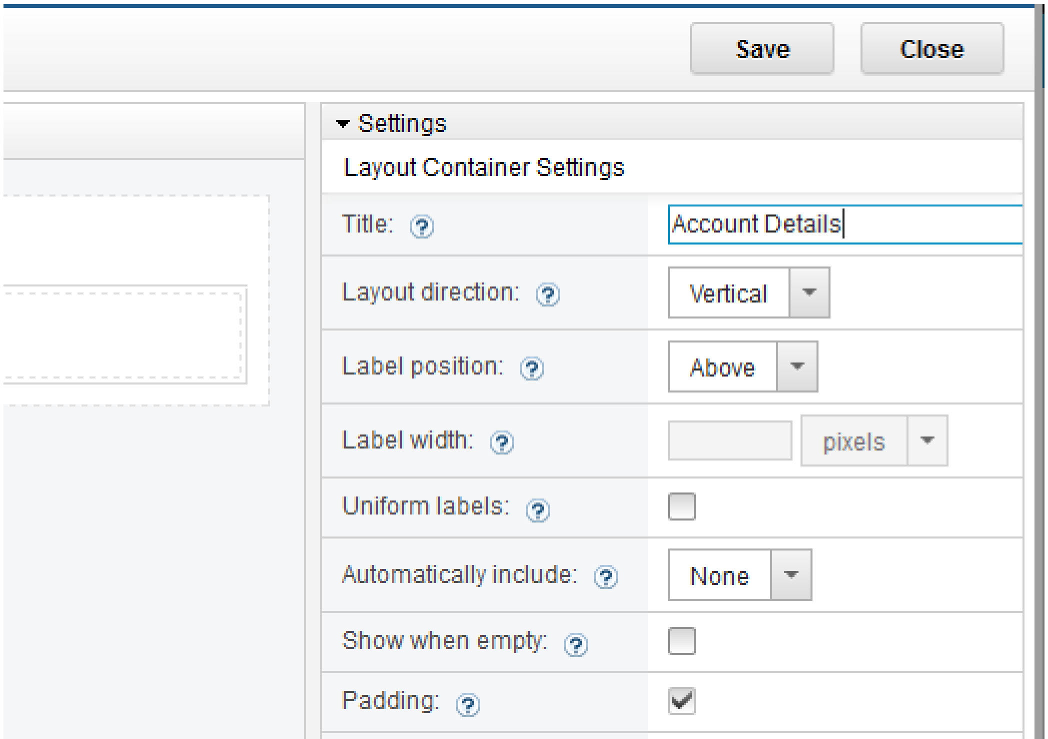


- Select the Tabbed Layout and drag and drop it in the working area pane in the center.

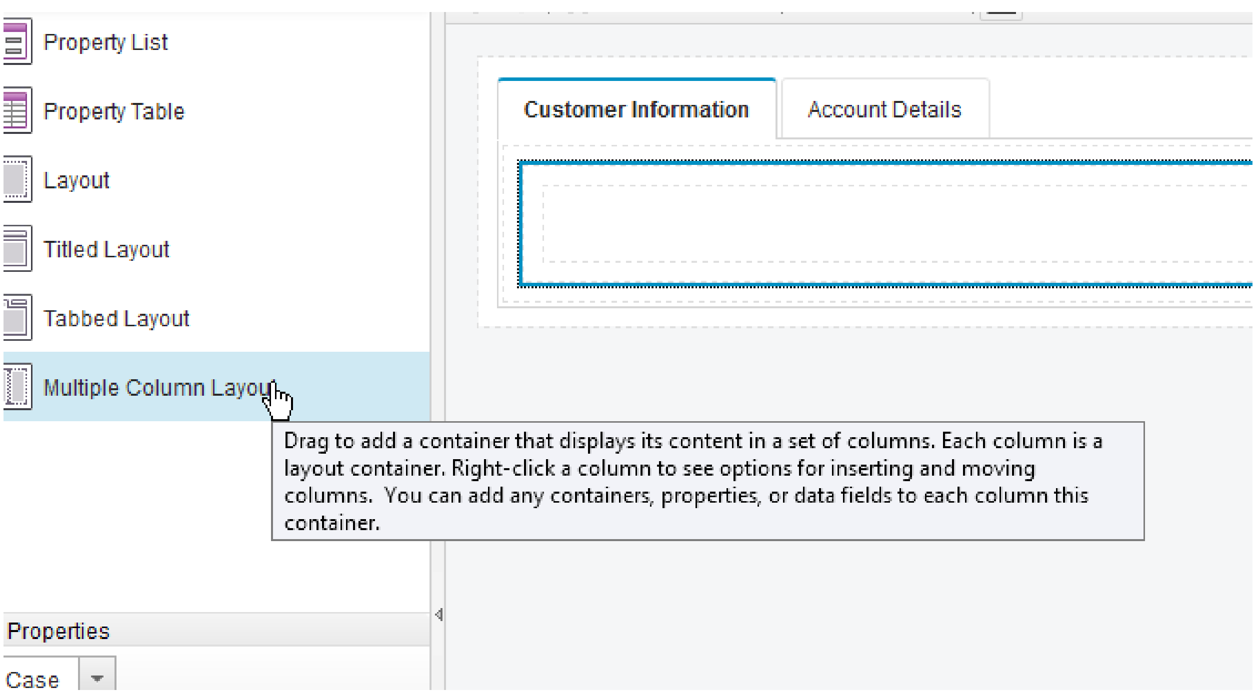


Rename the tabs as Customer Information and Account Details by Clicking on the tab and in the property pane to the right, set the Title

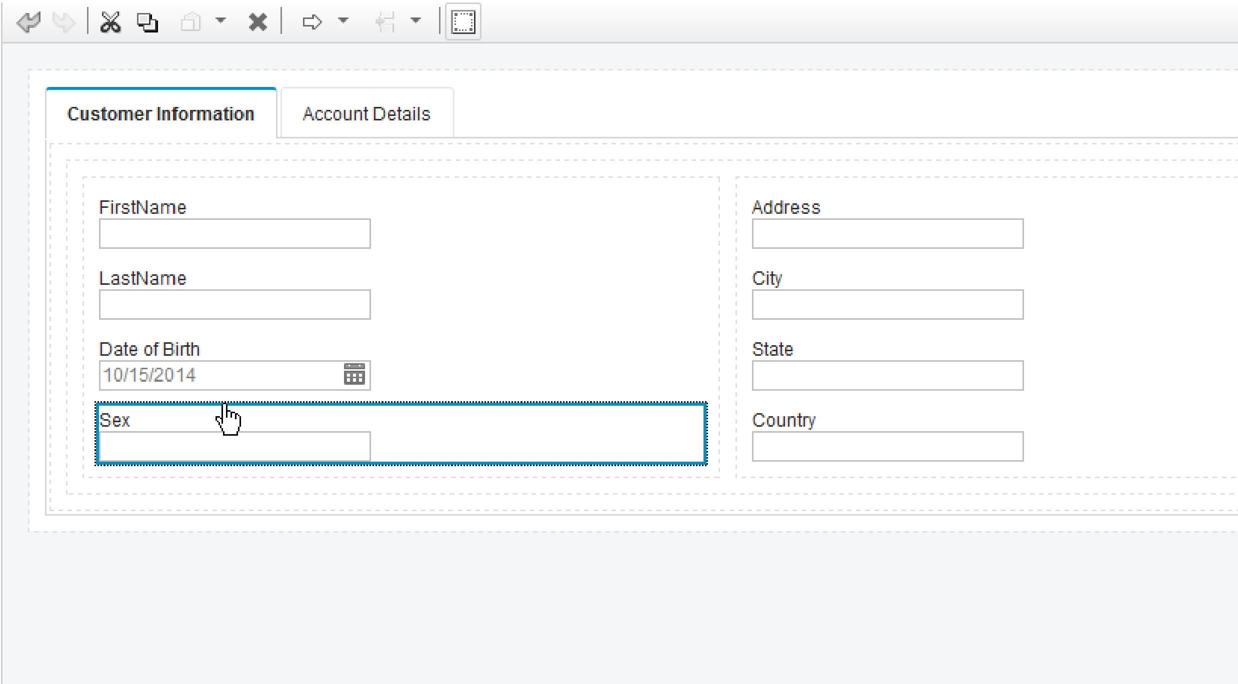




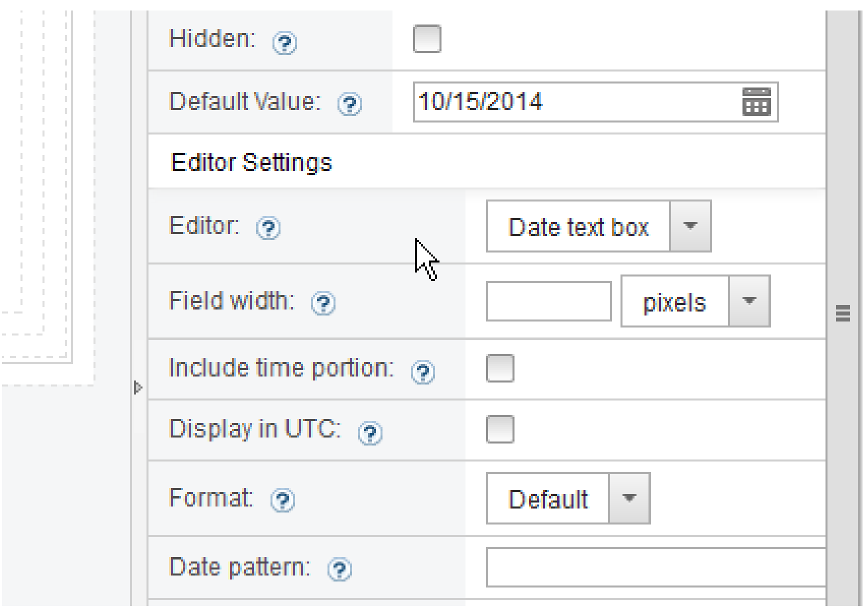
Click on the Customer Information and drag the Multiple Column Layout as shown:



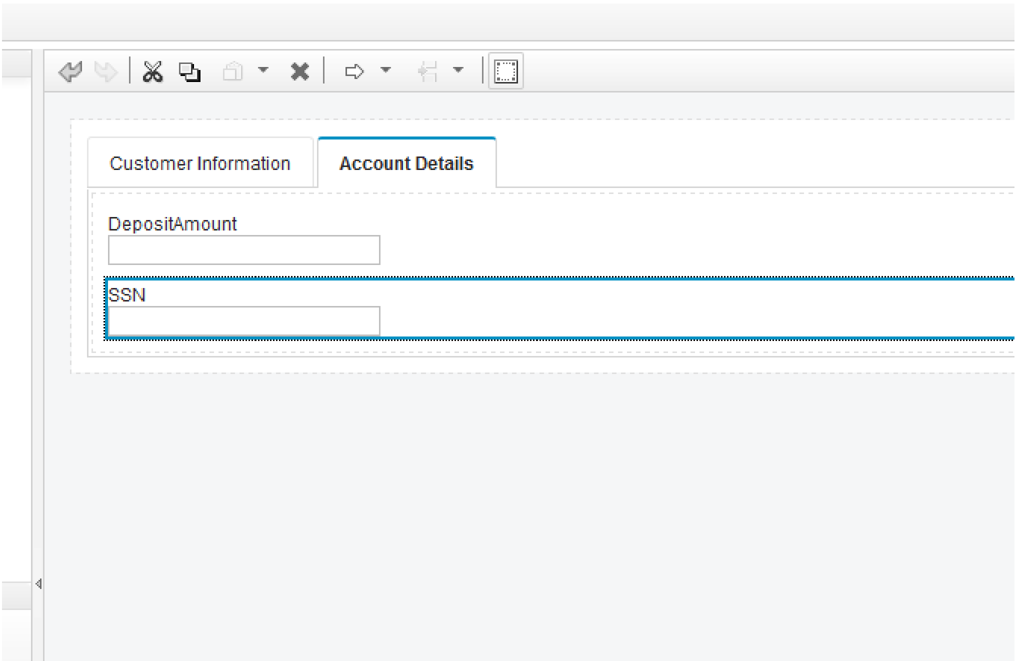
Drag the following properties from the Properties pane to the Customer Information tab and re-arrange them in the layout as shown below:



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



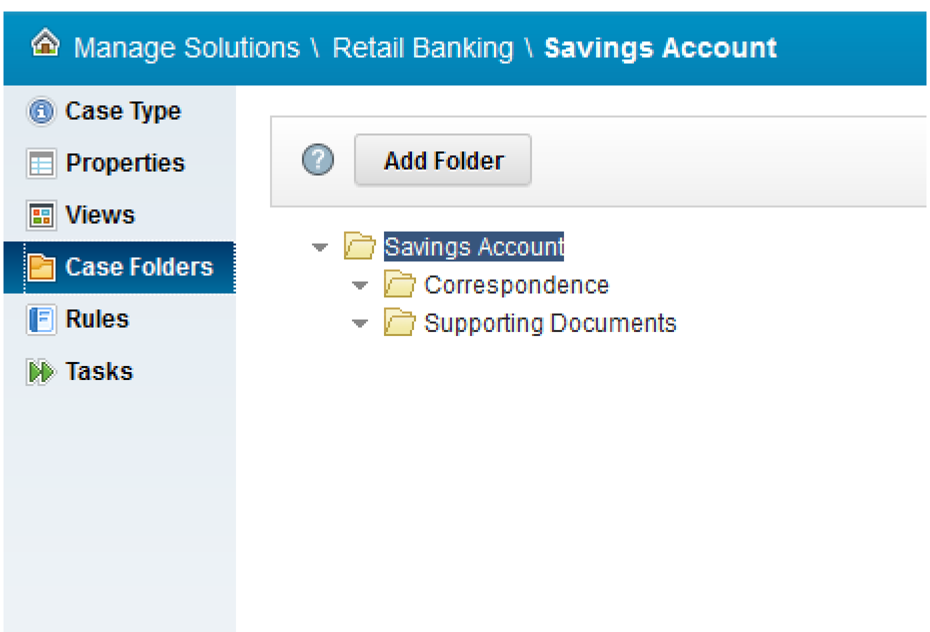
In Account Details tab, add the SSN and Deposit Amount



Save the Layout and Close it.

Case Folders

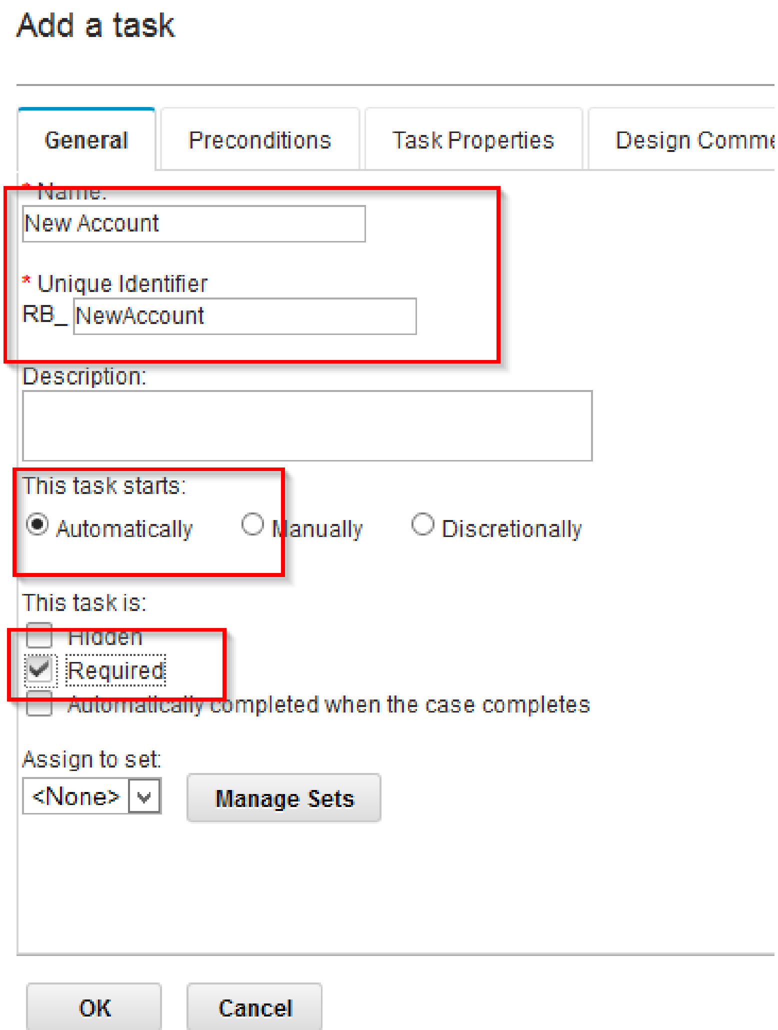
Create 2 folders in the Savings Account case folder -> Correspondence and SupportingDocuments.



Tasks:

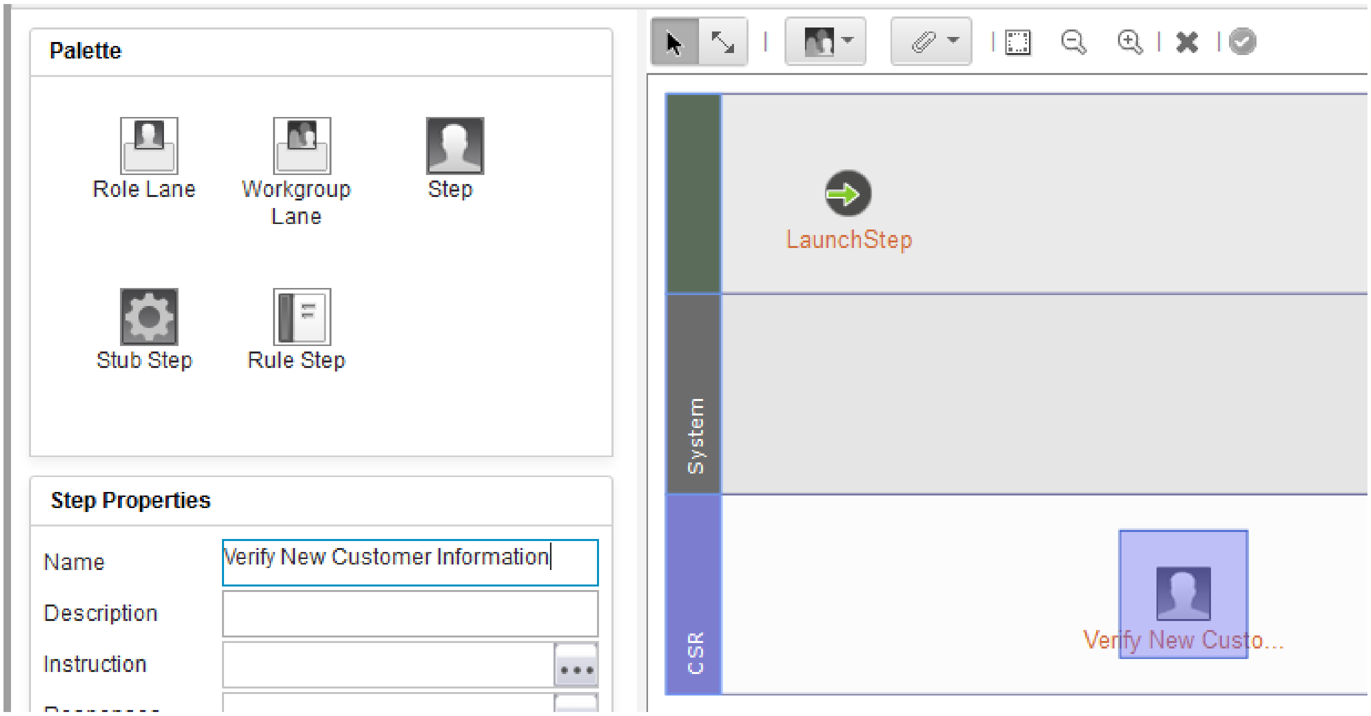
Open New Account:

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:

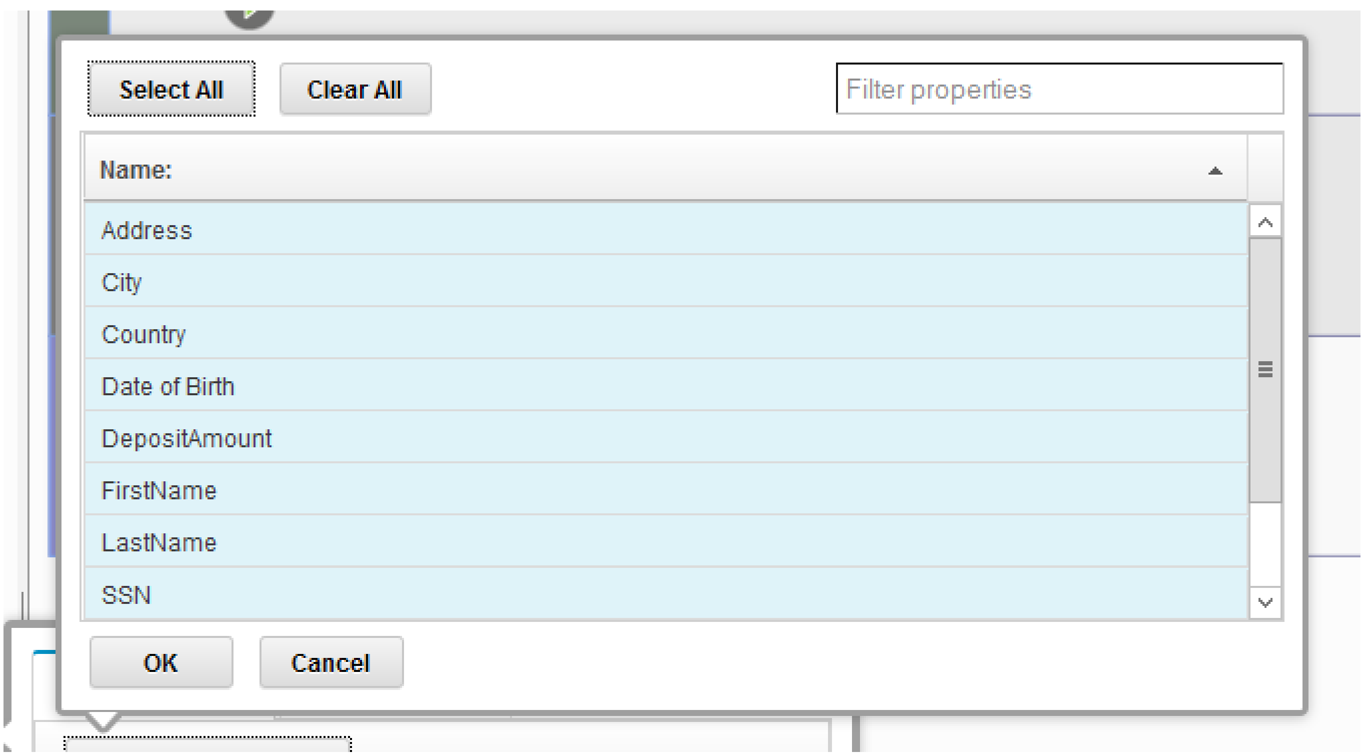


Click OK.

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.

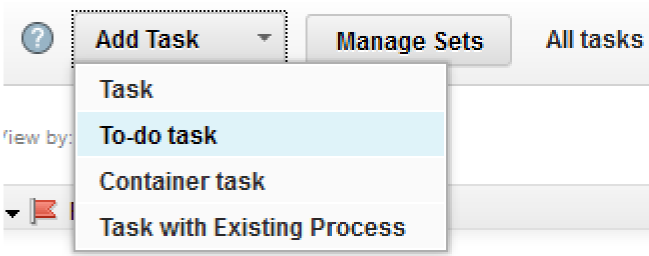


Connect the Launch Step to the Verify New Customer Information Step. Save and Close the Step Designer.

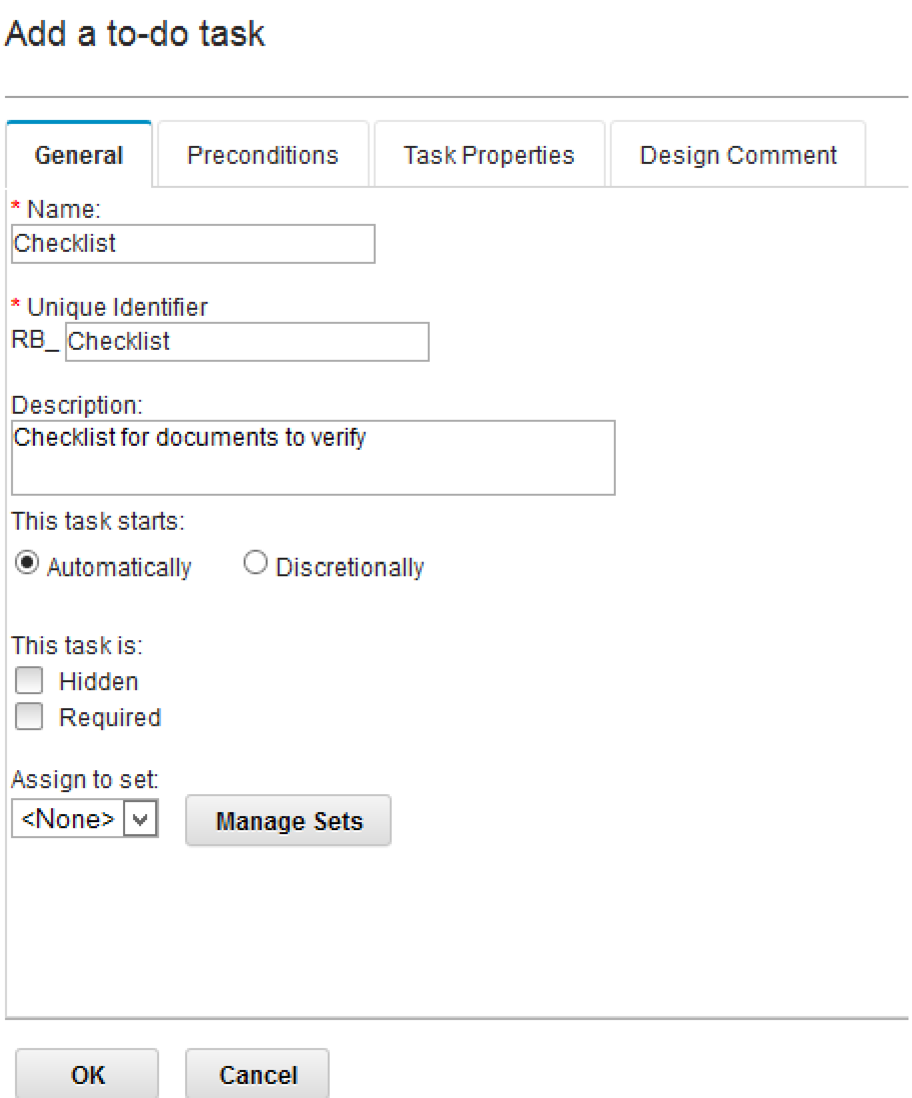
To-do Task List:

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.



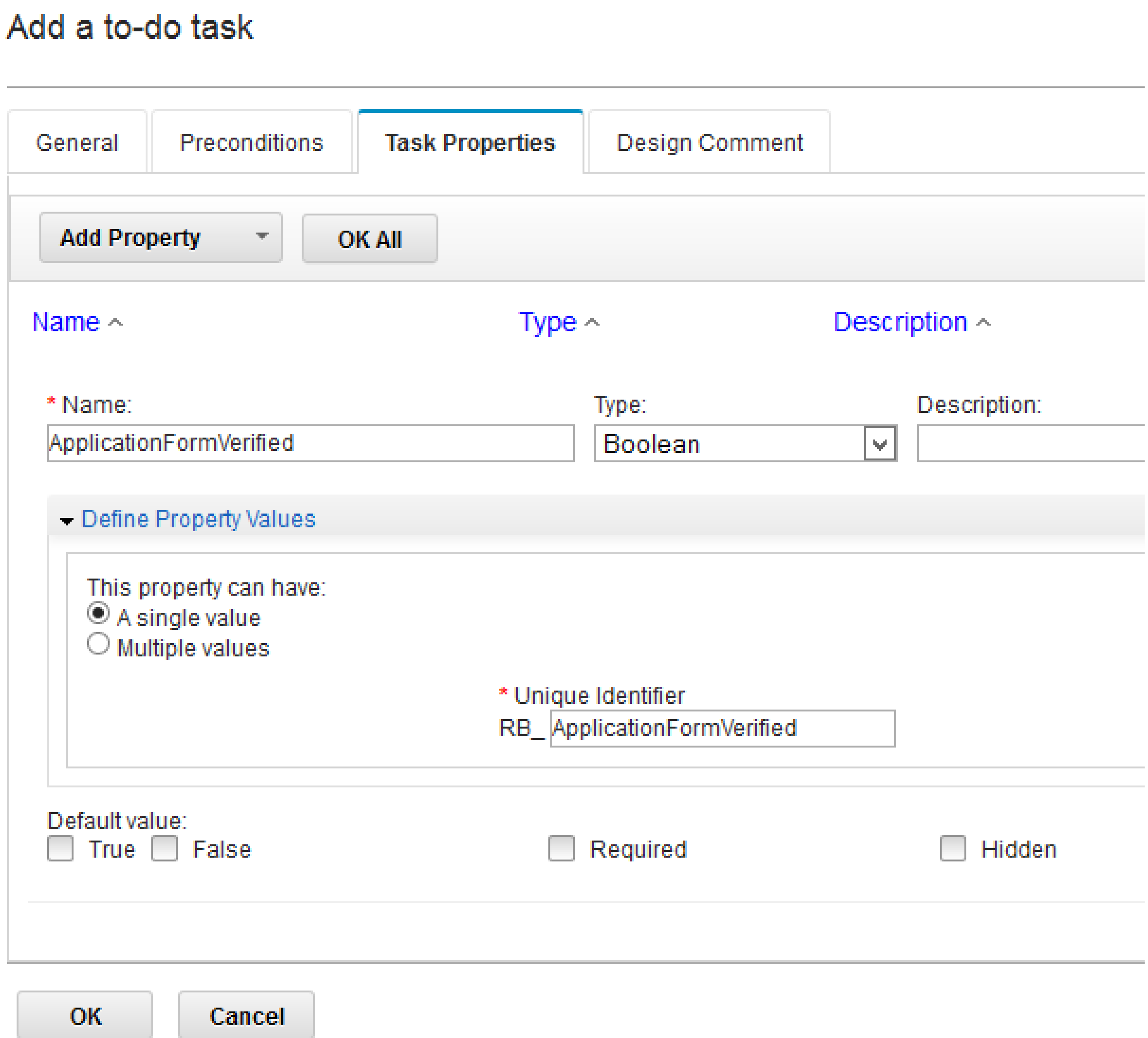
Fill in the values as shown below:



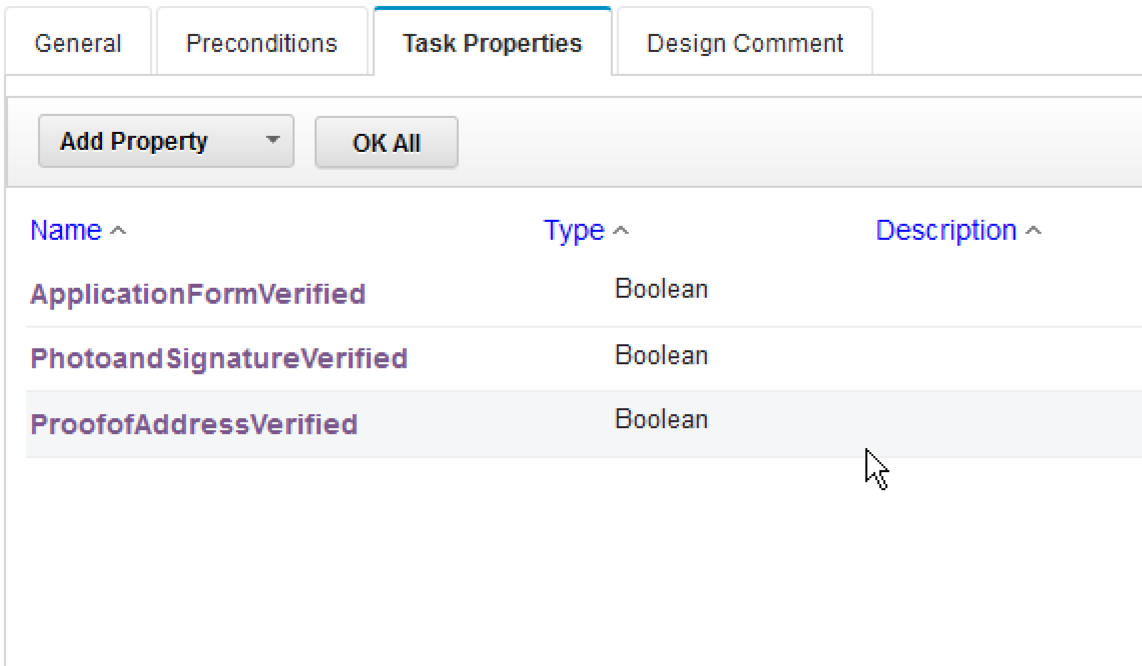
:

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

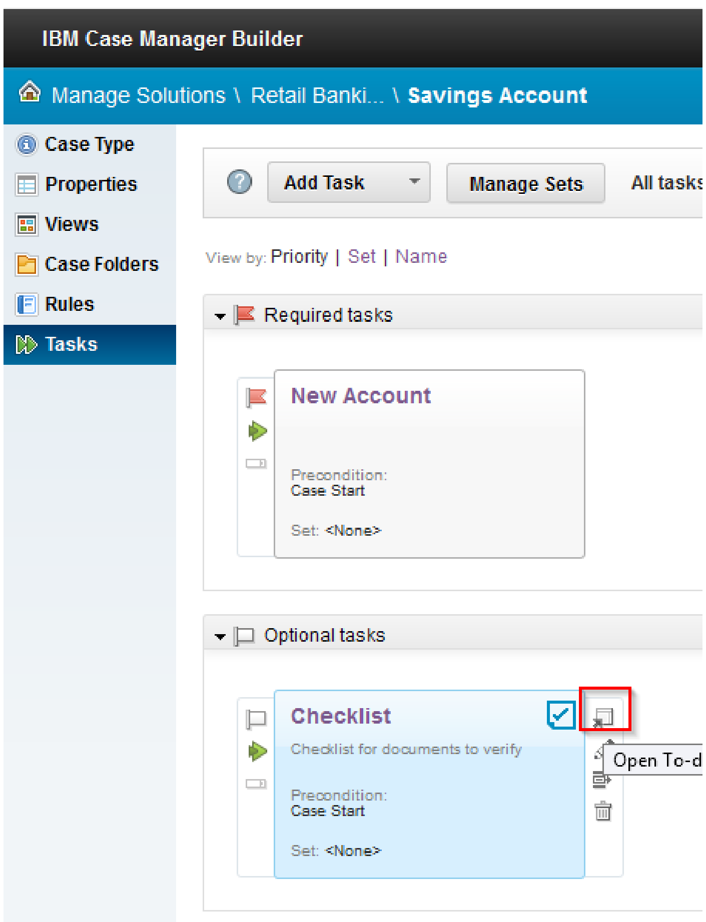
- ApplicationFormVerified
- PhotoandSignatureVerified
- ProofofAddressVerified



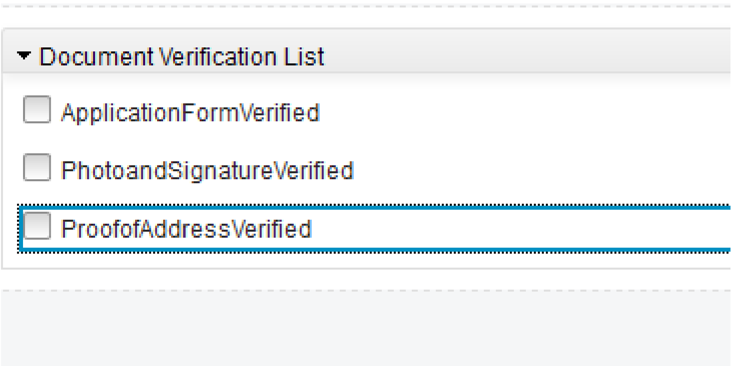
All the properties are Boolean data type.



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



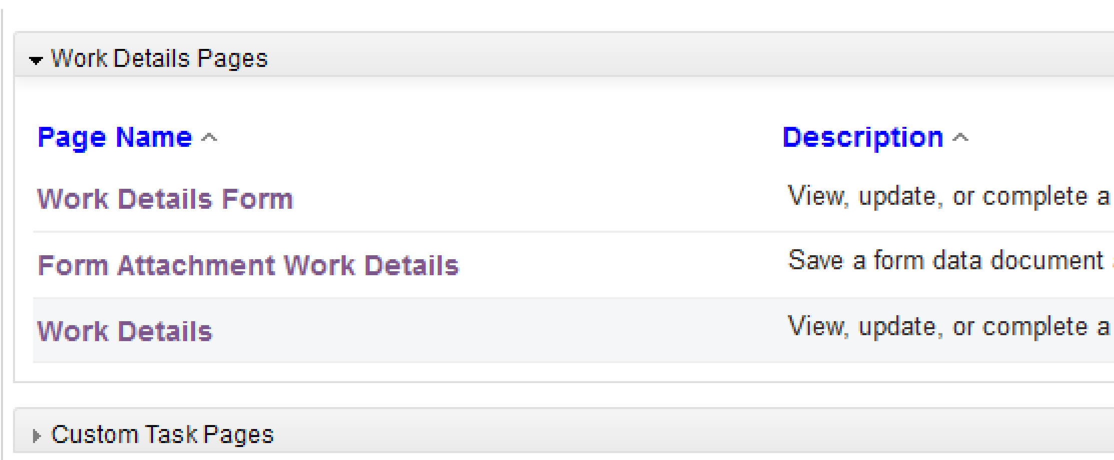
In the View Designer, drag and drop a Titled Layout and change the name of the layout to Document Verification List. From the list of Properties, drag and drop the 3 properties to the Titled layout as shown below:



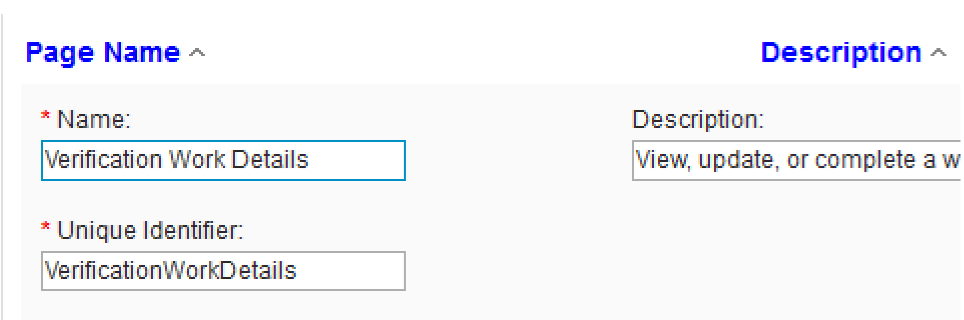
Save and close the View Designer. Click the Save button at the top of the page, then the Back button.

Verification Work Details page:

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

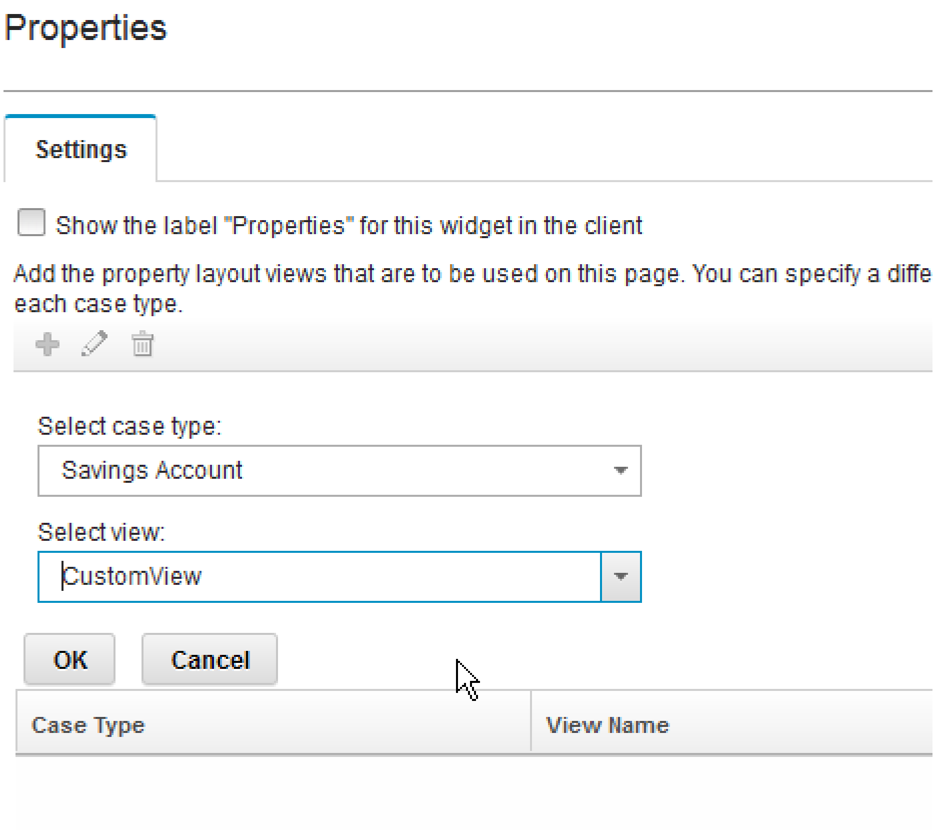


Set the new page name as Verification Work Details and click the OK button.



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

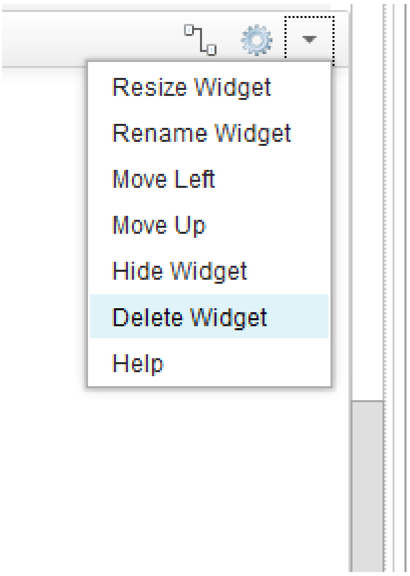
Click on Add and set the Select View to CustomView for the Savings Account Case Type:



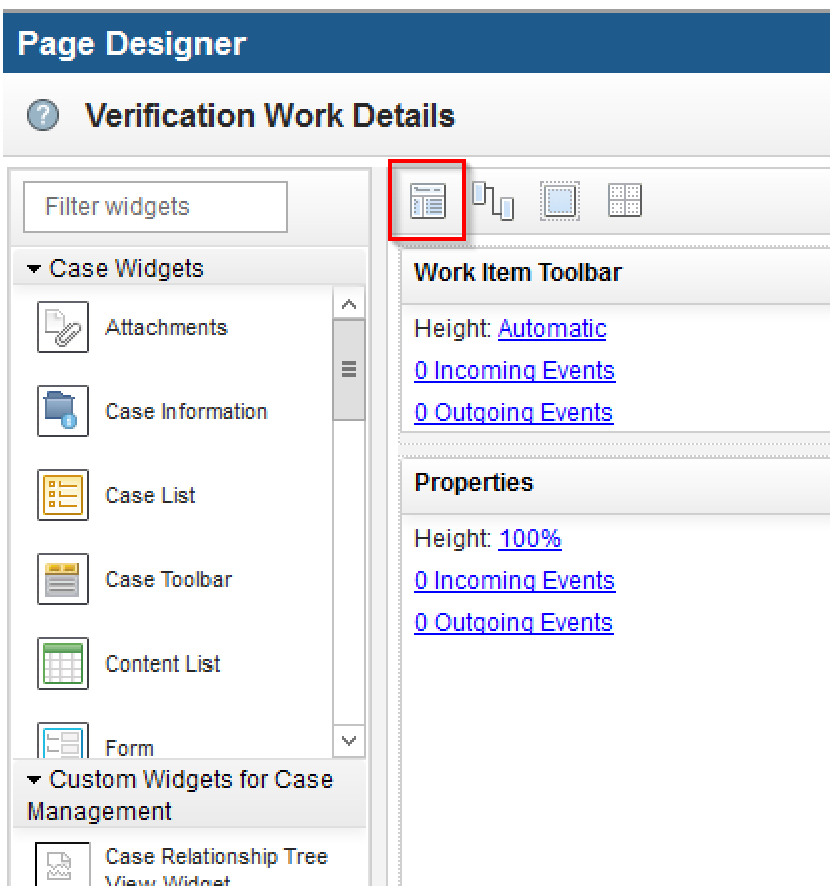
Click O.K. and O.K. Save and Close the Page Designer.

Redesigning and Customizing the Verification Work Details Page:

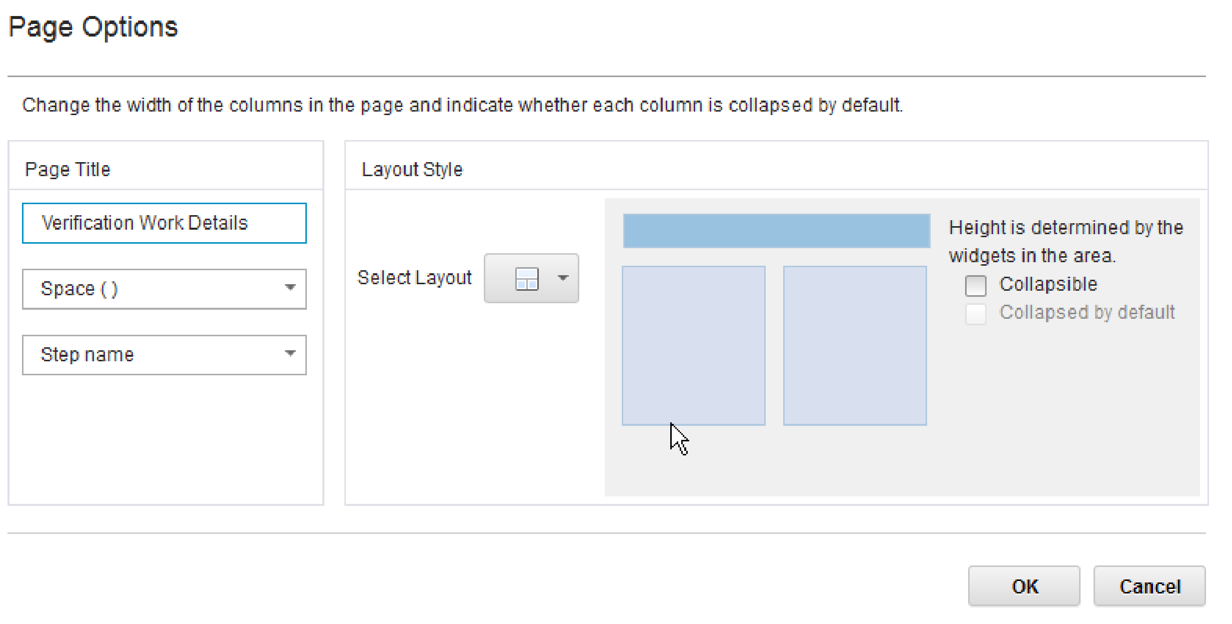
Open the Verification Work Details page in Page Designer. Remove the Case Information widget and the Attachment widget from the page. Click the Action dropdown and select Delete Widget.



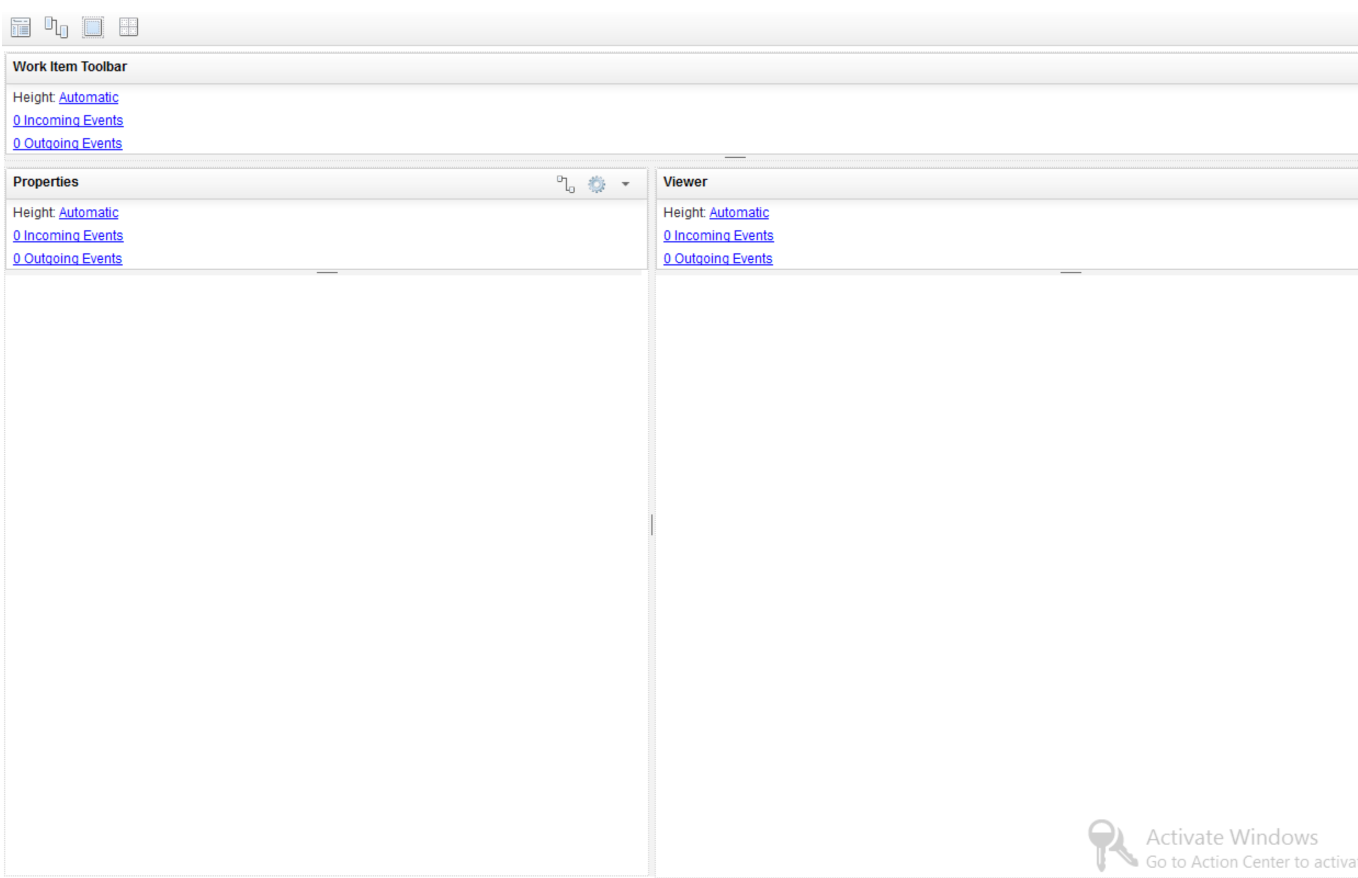
Click on Page Options in the upper left toolbar:



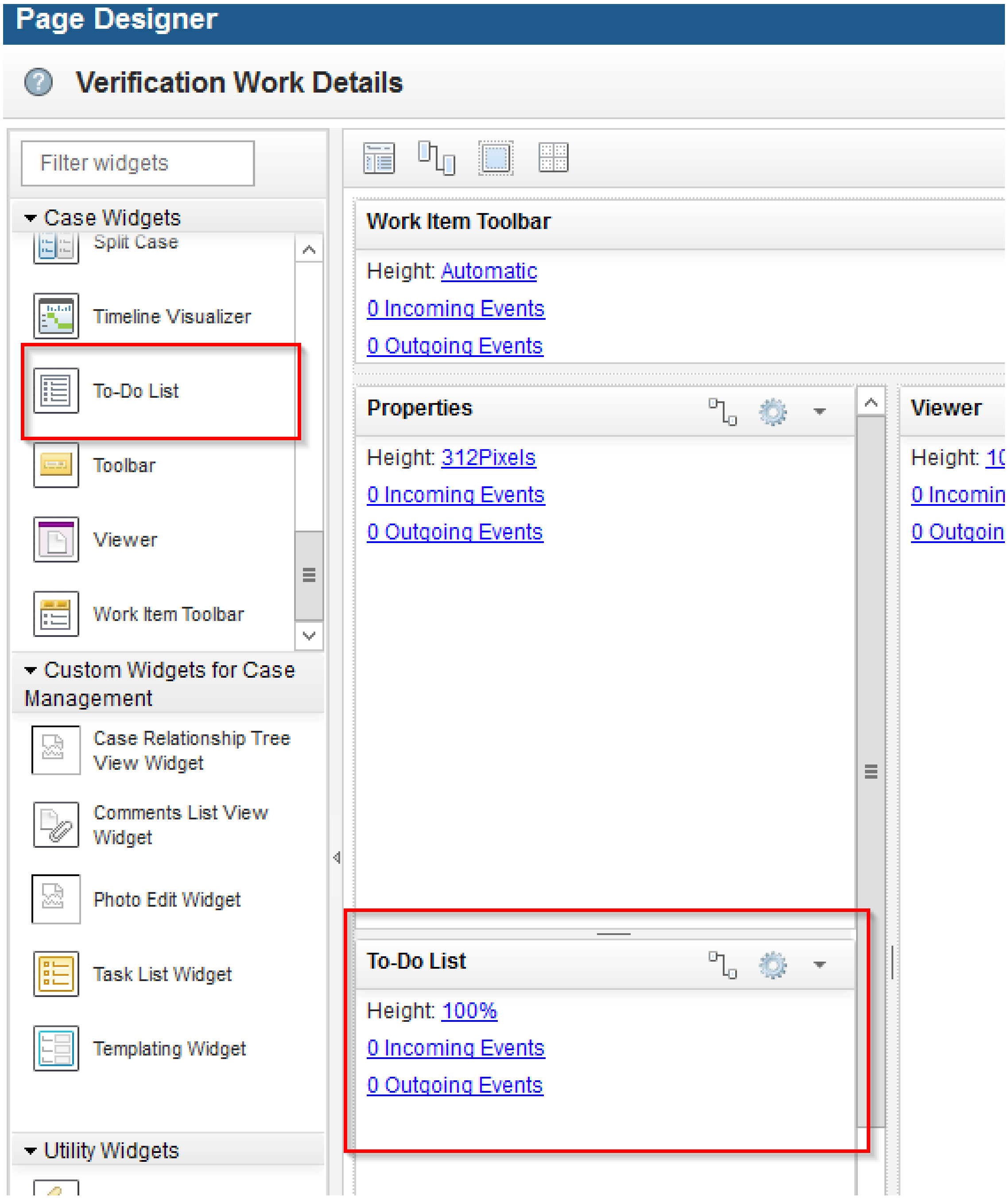
Rearrange the page layout by selecting the layout as shown below:



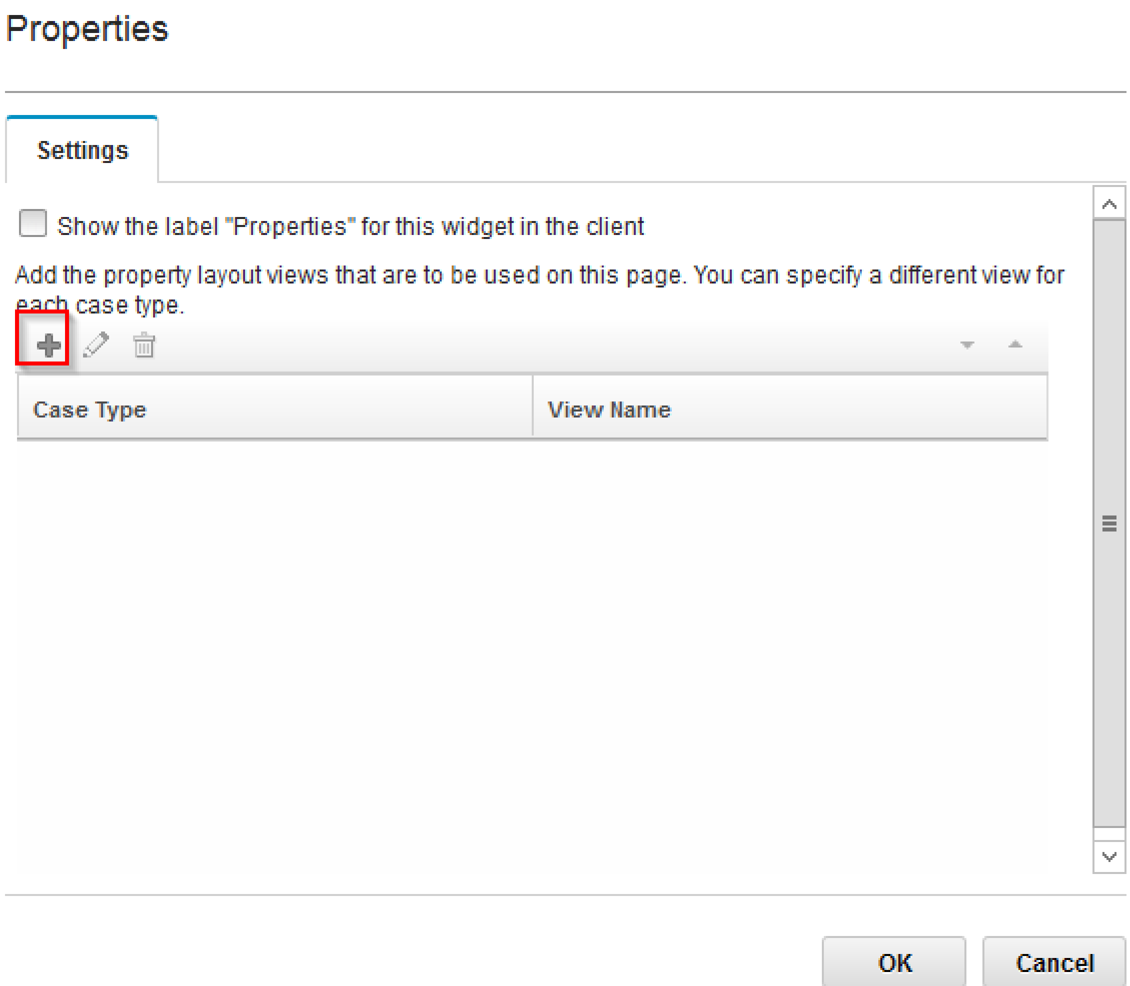
Click O.K. and Save page. Your page should look like this:



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.

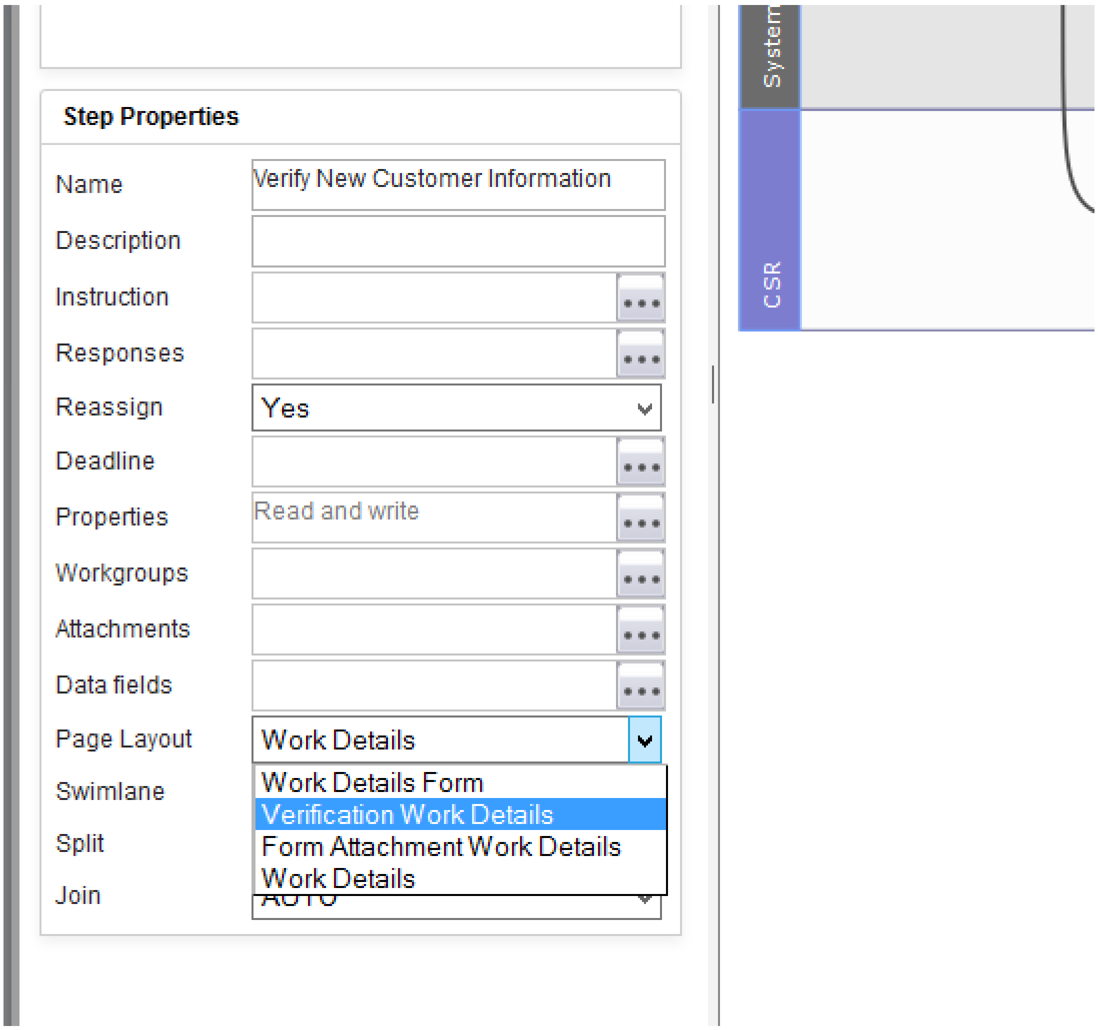


Click on Save and Close the Page Designer. Go to the Add Case page and open it in the Page Designer. In the Properties widget, click on the Edit Settings icon. Click the plus button to add a setting

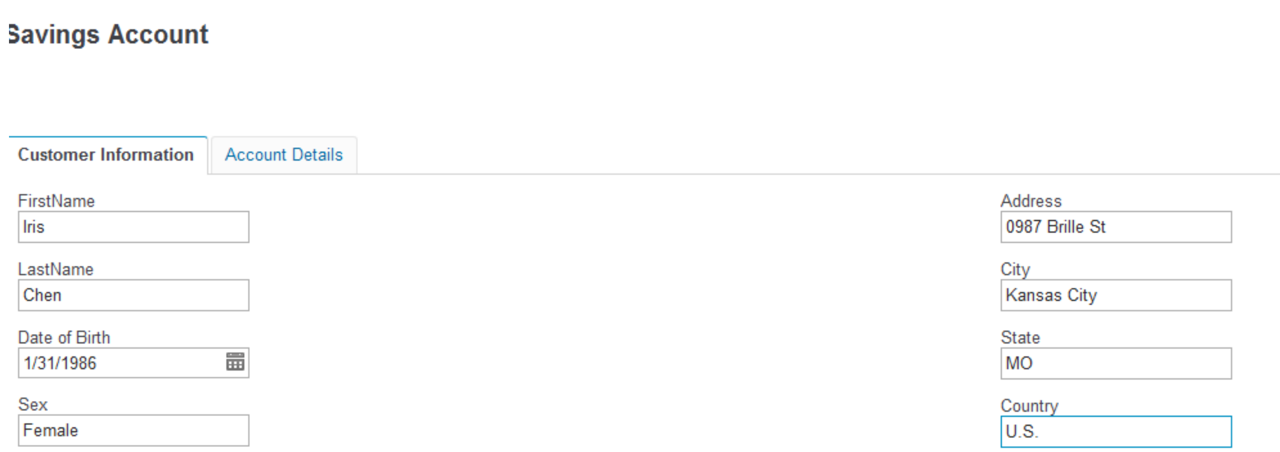


Select Savings Account and CustomView as the Case Type and Select View. Click OK twice.

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.

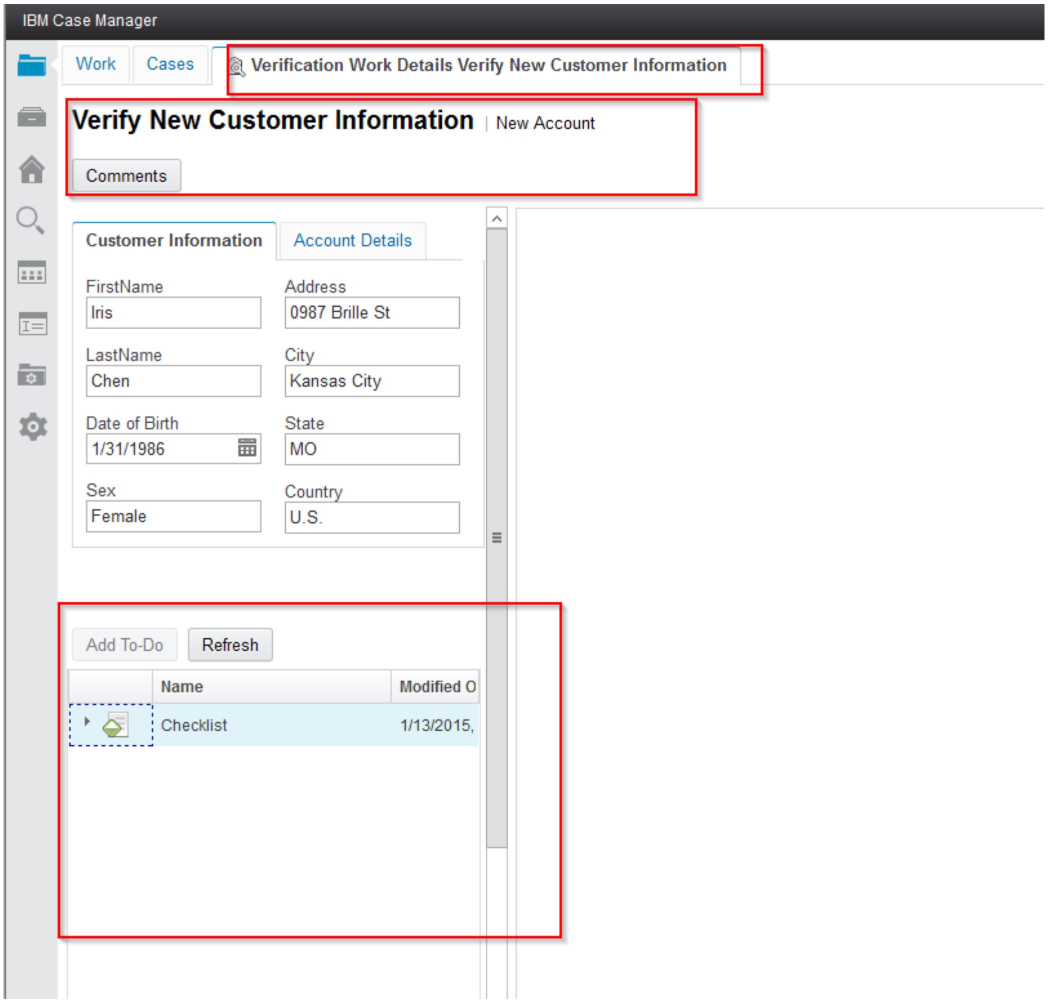


Save and Close the solution and deploy it (commit it as well). When ready, click the Test link and open the Case Client. Create a new case by clicking the Add Case button, and selecting Savings Account as the Case Type. Fill in the property values:

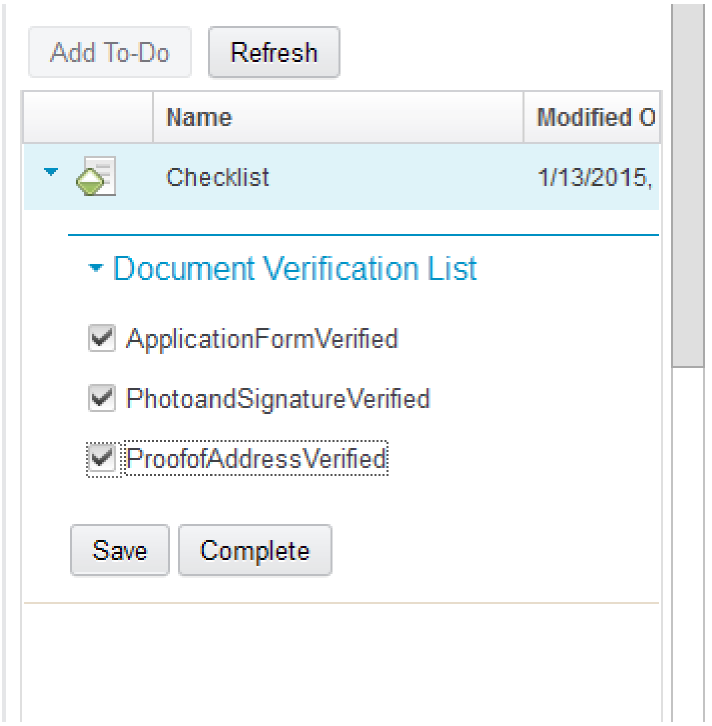


Click Add.

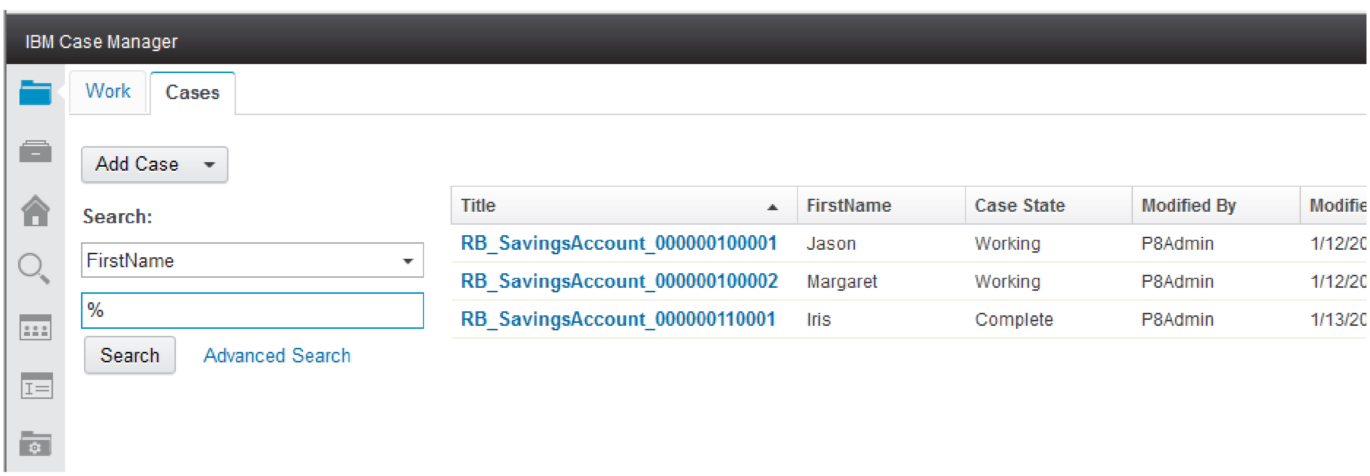
On the Work page, click the CSR tab to refresh the workitem list. Click on the workitem for the case that you created. Notice that your are in the Verification Work Detail page, and the workitem is for the Verify New Customer Information step of the New Account task. Below the property witdget is the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



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



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:



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.

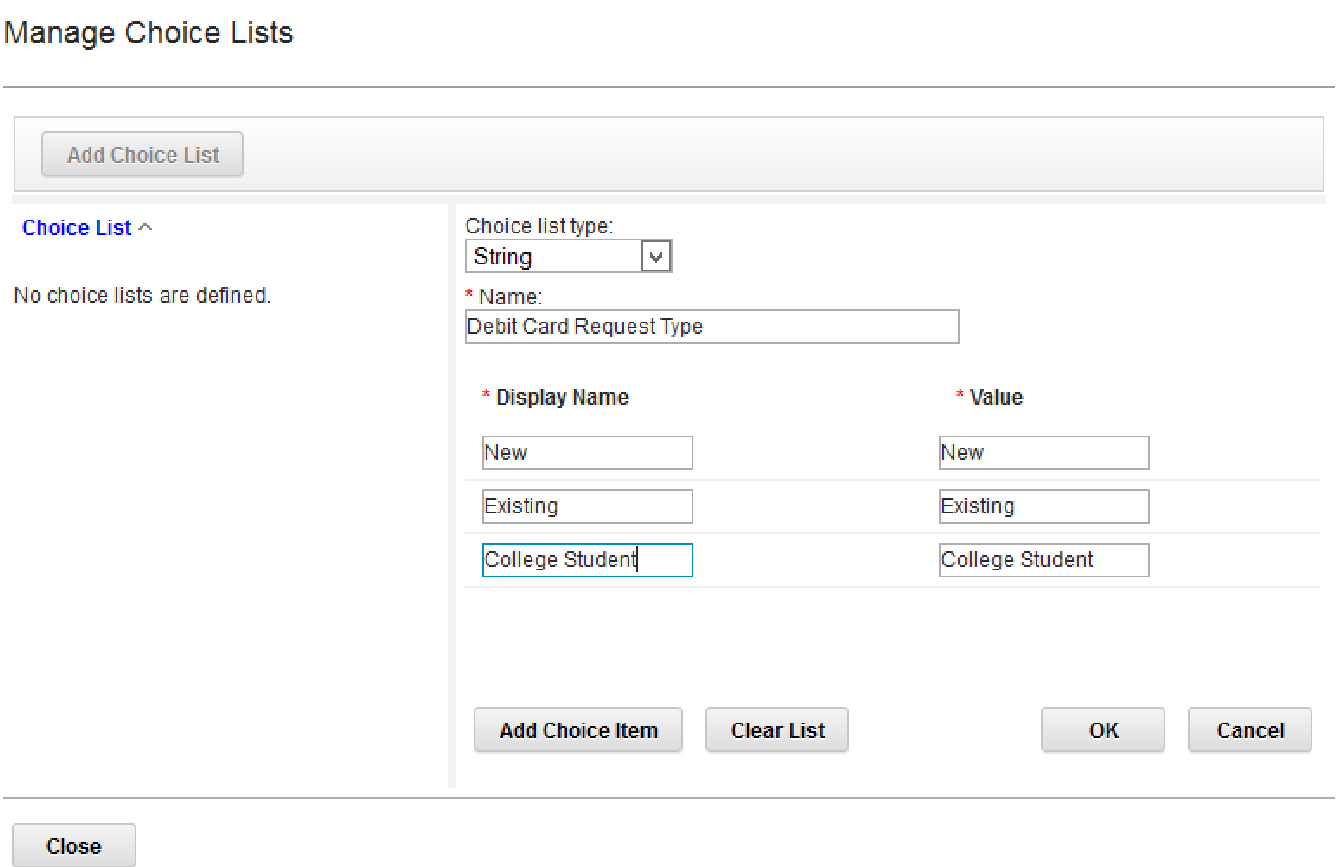
Close the case, and close the Case Client.

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.

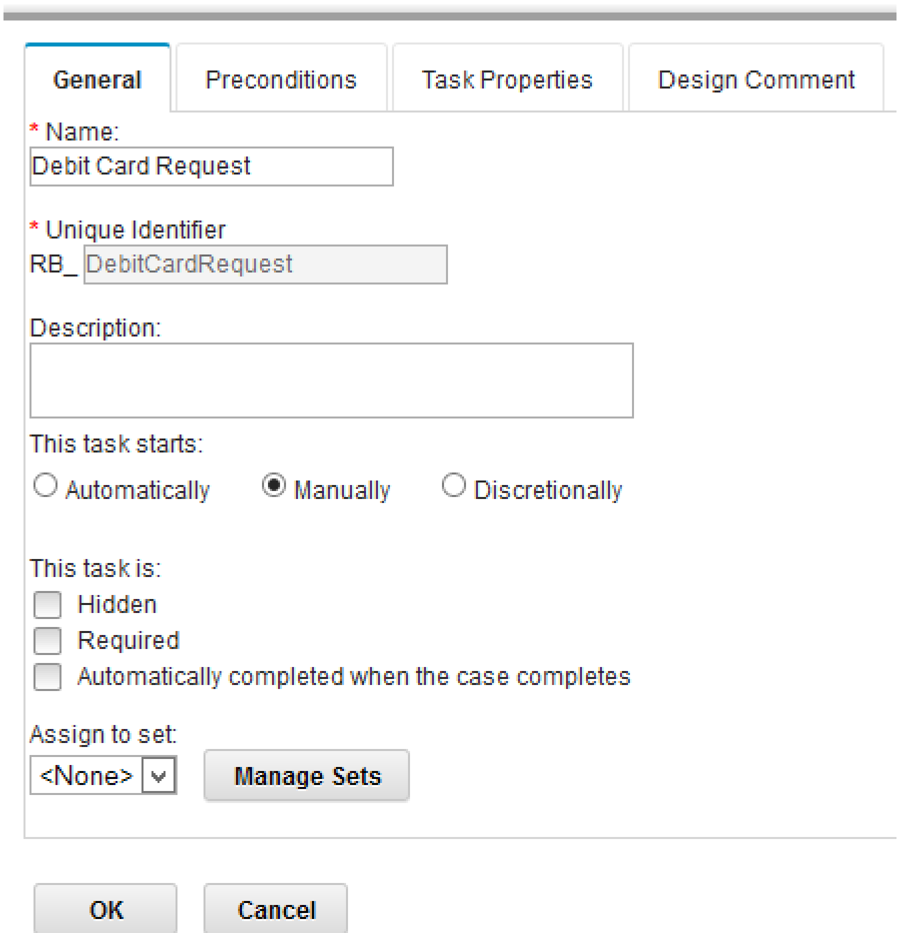
In the Case Builder, open the Retail Banking Solutiion and click on the Properties tab. Add a new Choice List. Click the Manage Choice Lists button and name the choice list Debit Card Request Type. Click the Add Choice Items button to add the following choices:

- New
- Existing
- College Student



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:



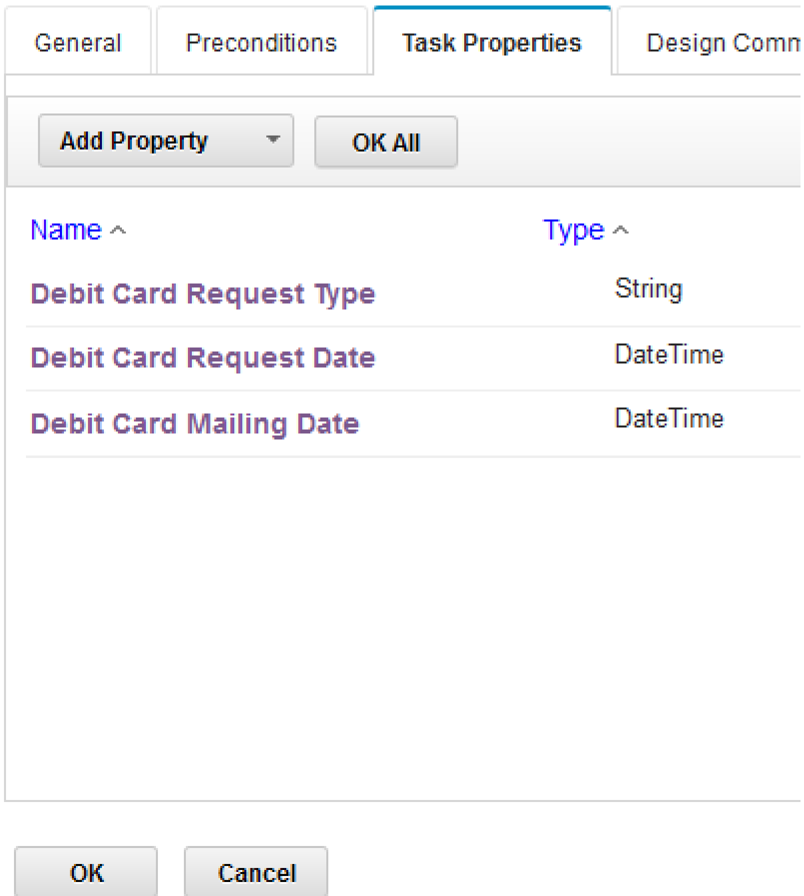
Click on the Task Properties tab. We will add task properties to this task. Add the following properties:

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

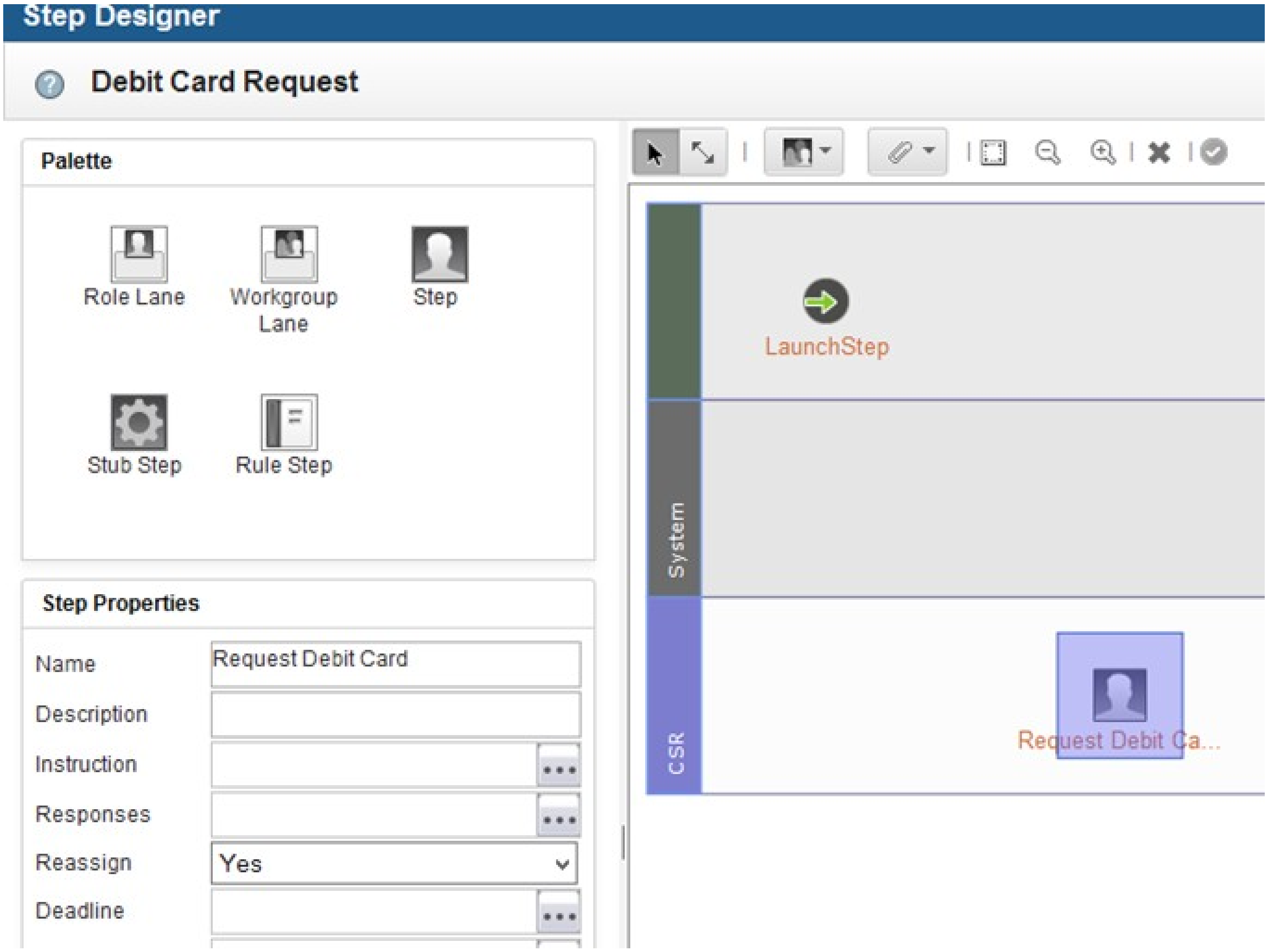
New - Debit Card Request Date   DateTime

New - Debit Card Mailing Date   DateTime

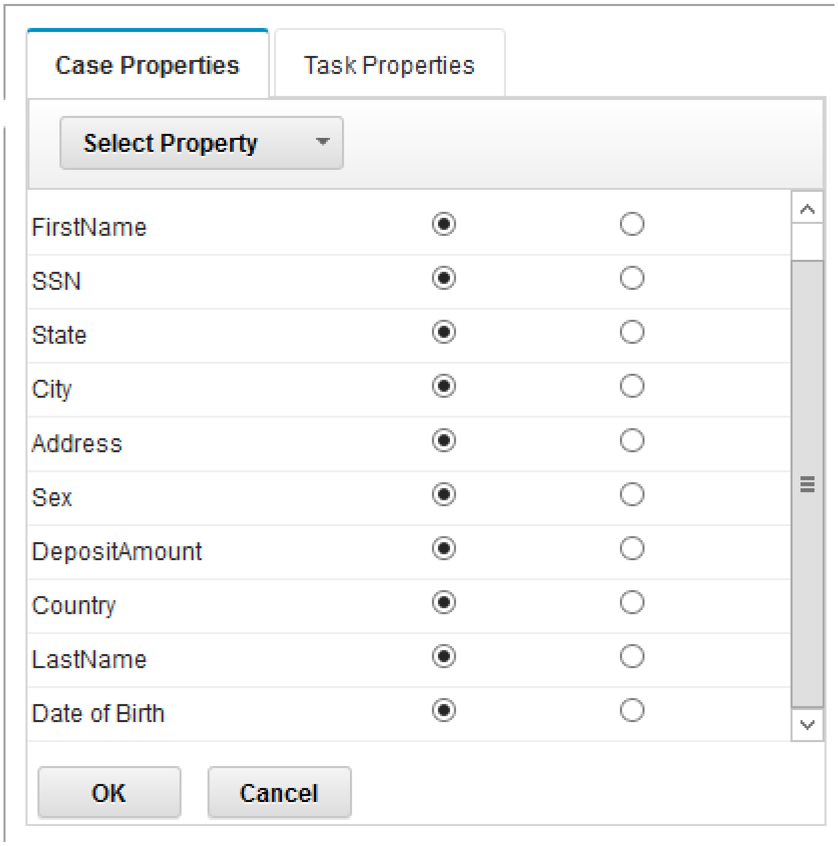
Click OK All.



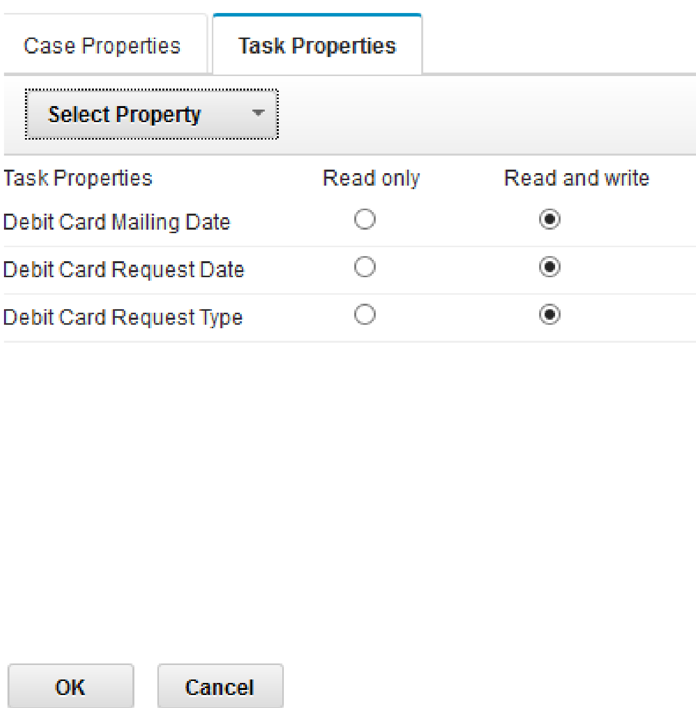
Click OK. Open the Debit Card Request task in the Step Designer. Add a Role Lane and set the Role to CSR. Add a step to the Role Lane, and name the step Request Debit Card:



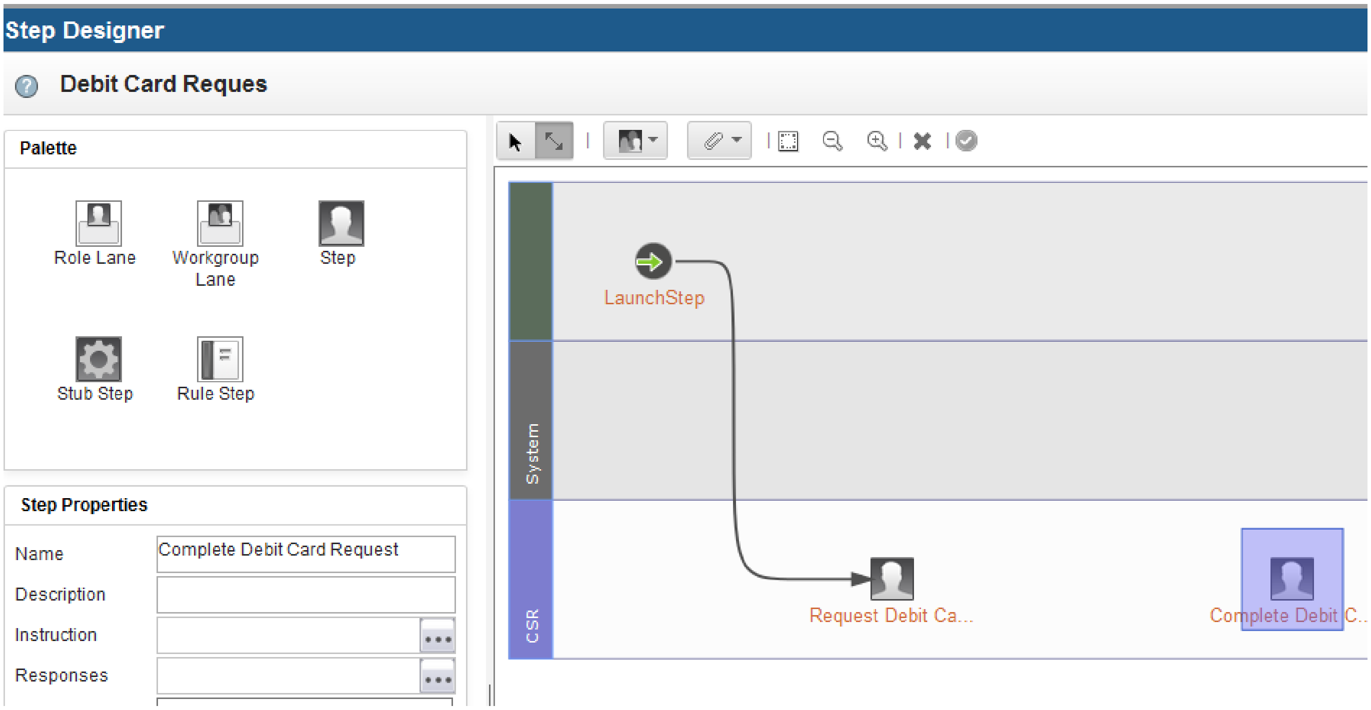
Add Properties to the step. Click on the "…" button next to the Properties field. Under the Case Properties tab, click the Select Property button, and Select All. Click OK. Set the case properties to Read only.



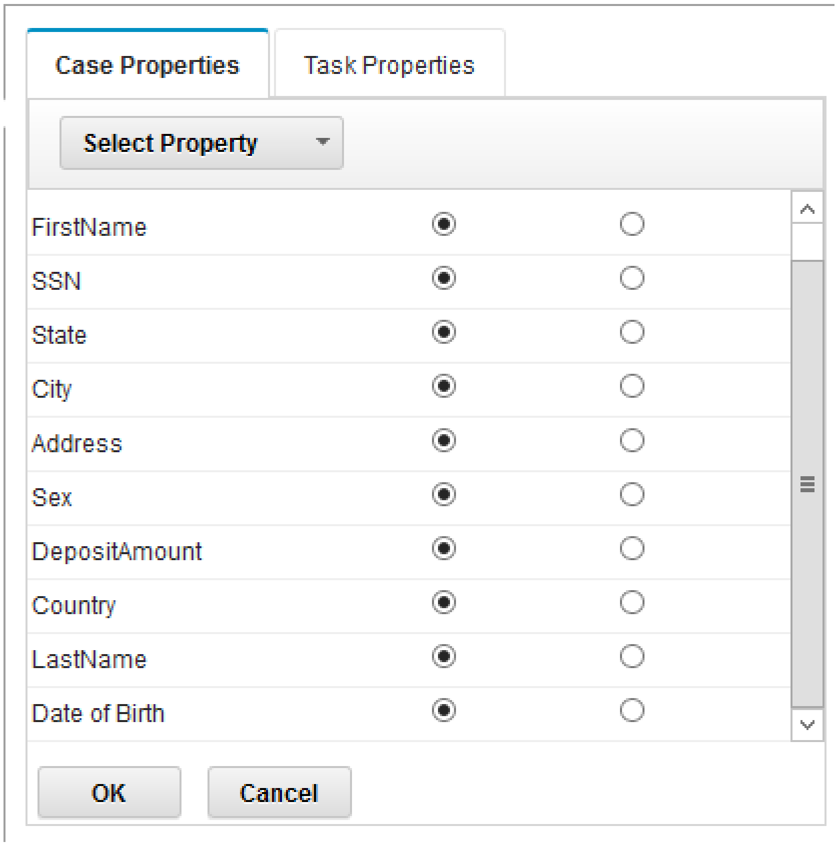
Click on the Task Properties tab. Select Properties, Select All, and leave the properties as Read and Write.



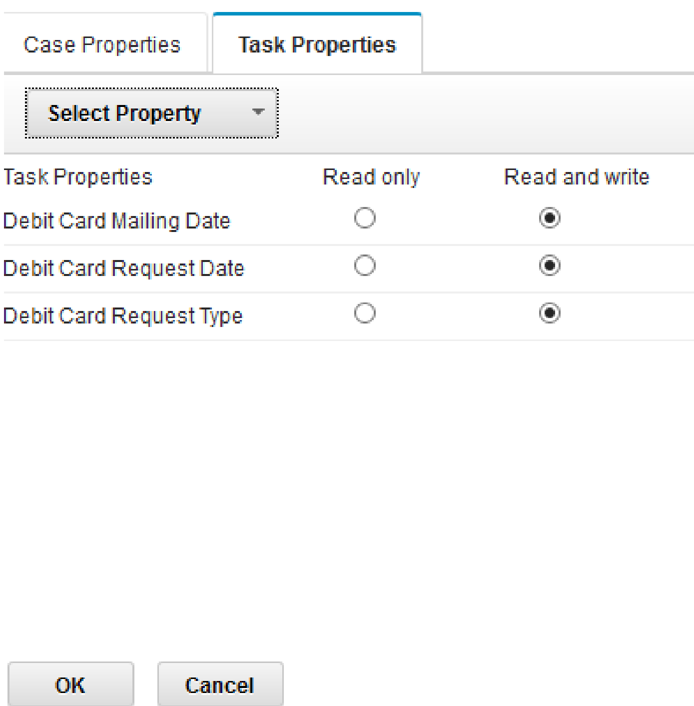
Clck OK. Set the Page Layout field to Verification Work Details. Add a connector between the Lanch Step and the Request Debit Card step. Next add another step to the CSR Role Lane, and name the step Complete Debit Card Request:



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.

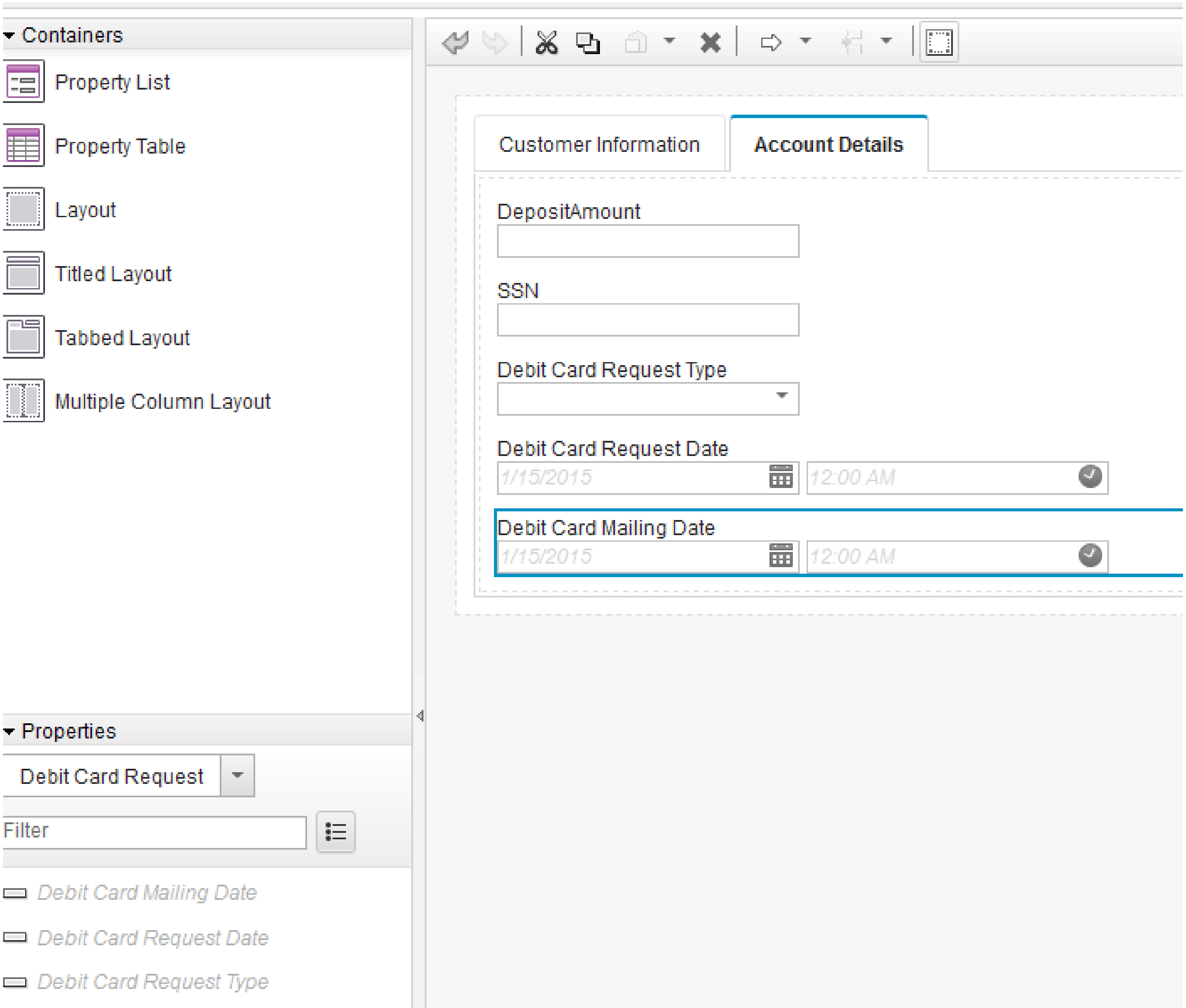


Click on the Task Properties tab. Select Properties, Select All, and leave the properties as Read and Write.



Clck 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.

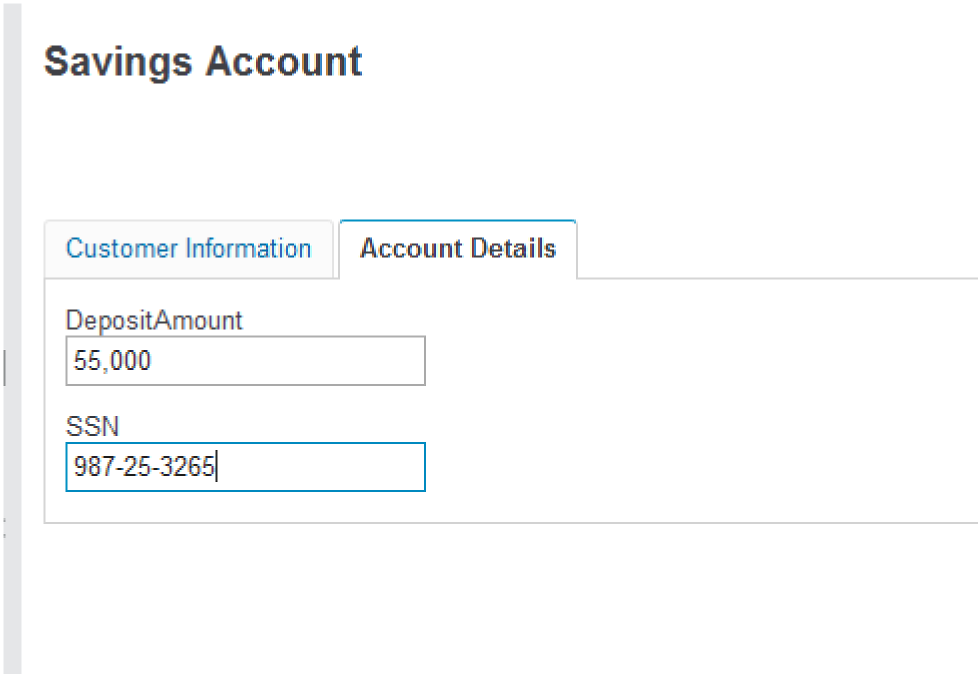
Click on Views, and the Properties Layout tab. Click on CustomView and open the Properties View Designer. Under the Properties pallete, select the Debit Card Request task. The following task properties will be displayed. Drag and drop these three task properties under the Account Details tab:



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:

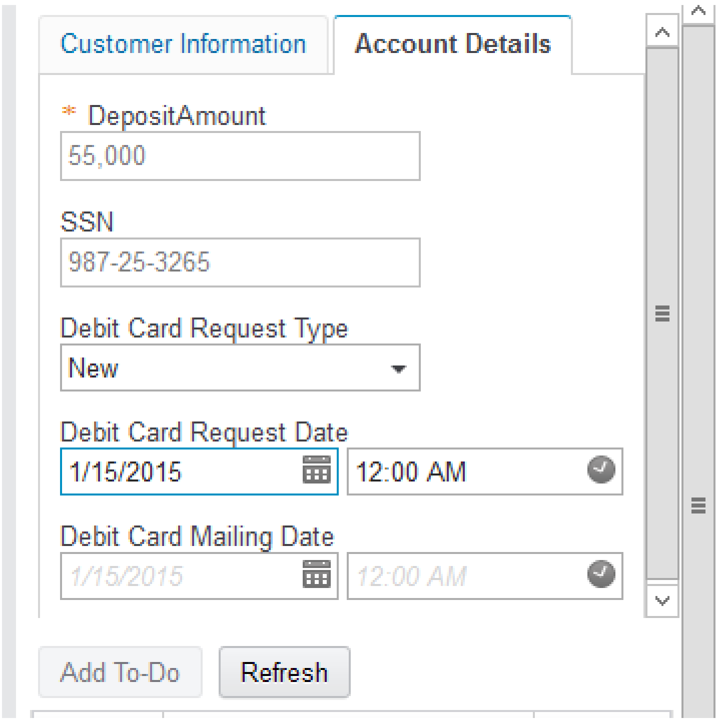


Click Add. In the Work tab, locate the work item Verify New Customer Information,and click on the link. In the Properties widget, notice that the Task Properties for the Debit Card are not displayed in the Account Details tab. The Debit Card Task Properties are only assigned to the Request Debit Card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

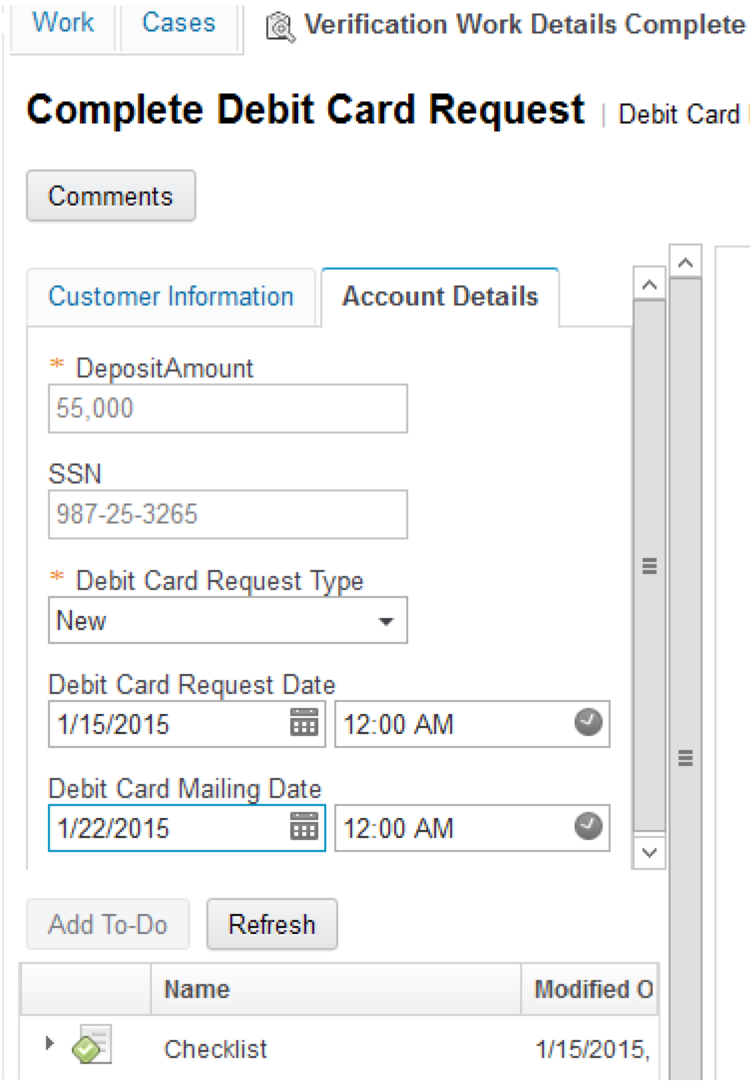
Check the three To-do item in the To-do list widget and click Complete. Complete the Verify New Customer Information step. Click on the Cases tab, put an % in the search field, and click the Search button. Double click on the case that you just created.

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 Detials 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.

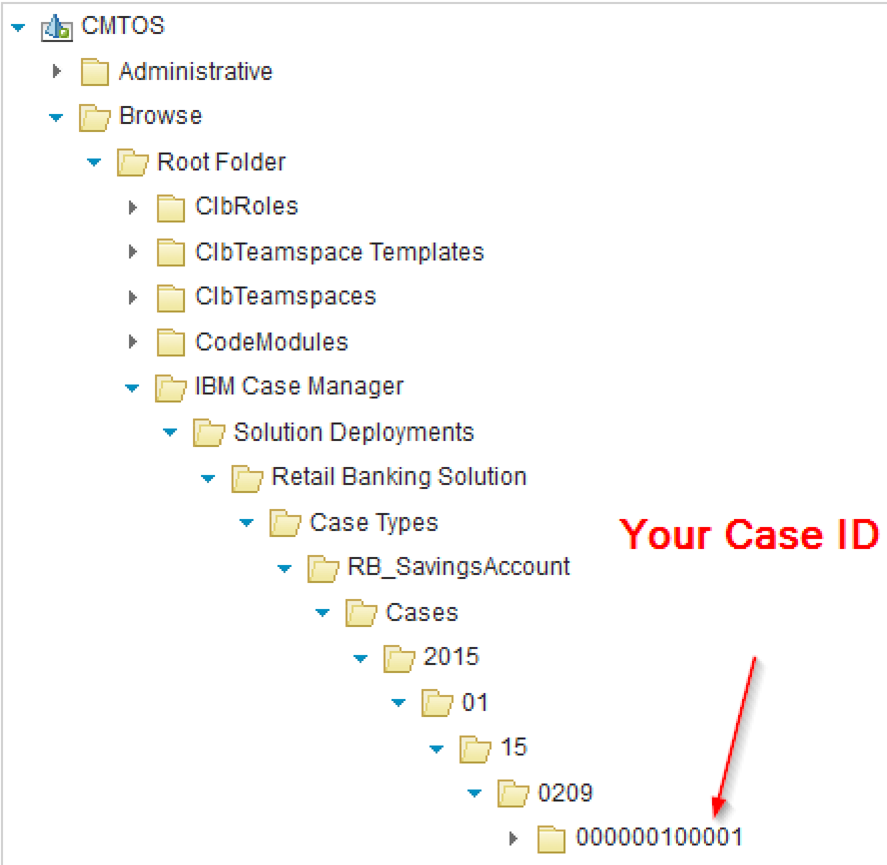


Complete the step, and return to the Work page. Open the Complete Debit Card Request work item, go to the Account Details tab. Notice that the values for Debit Card Request Type and Debit Card Request Date have been retained and carried forward to this step in the task. Update the Debit Card Mailing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

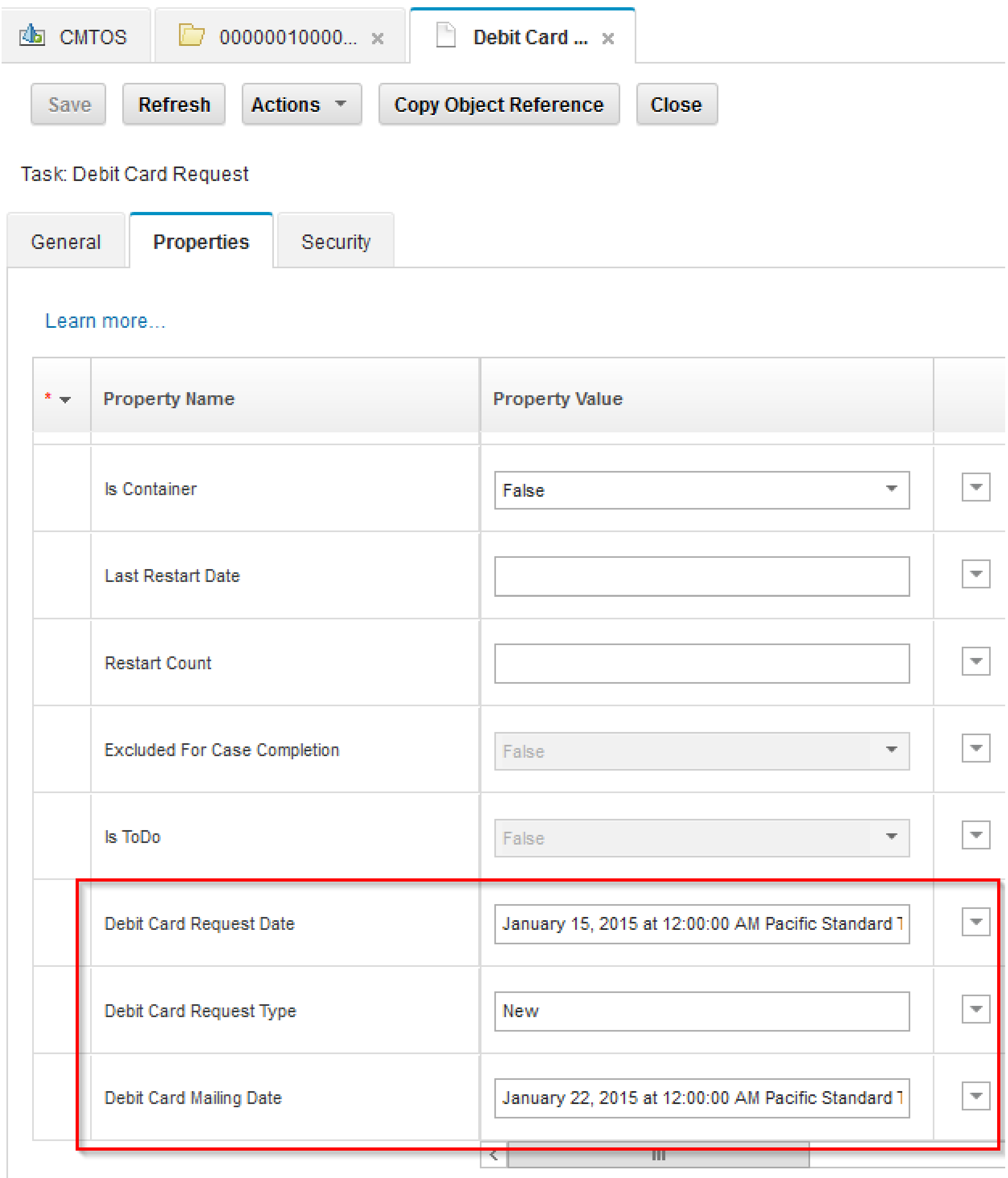


Complete the step. Under the Cases tab, put an % in the search field, and click Search. Open the Case that you just completed. Write down, or cut and paste the Case ID (like RB_SavingsAccount_000000100001). Close the case, and Close the Case Client.

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 foler 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 wil see the Debit Card Task Properties and their values.



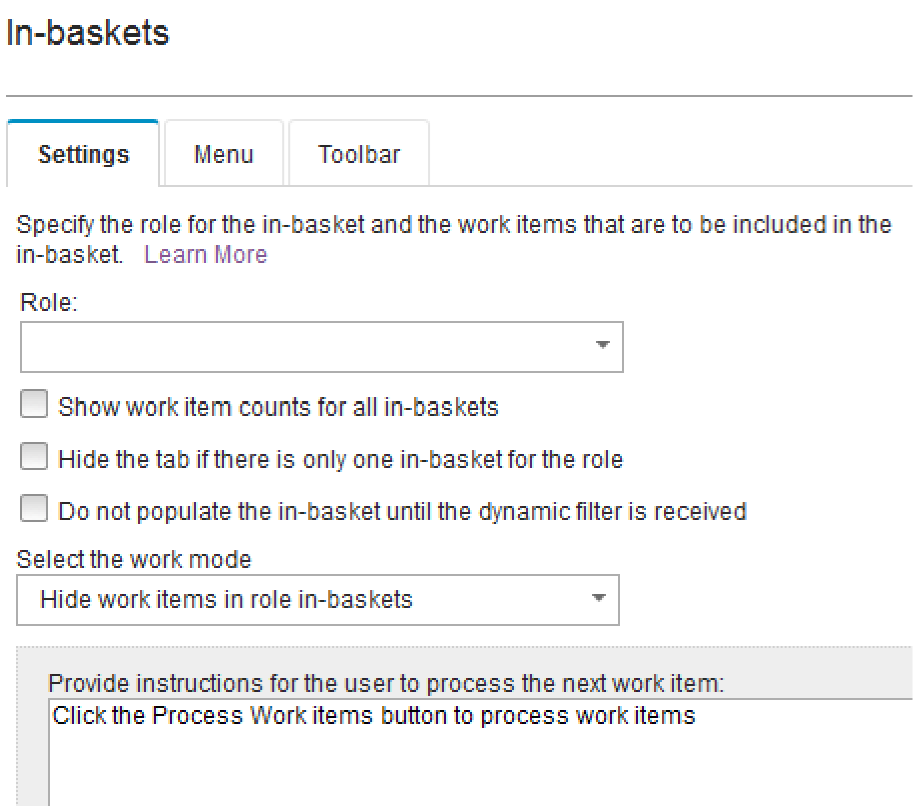
These properties are not Case properties, and they are not stored as properties of the Case folder. As task properties, the values are stored with the task instance. Also, if you add these properties to other tasks, these values are not available, and the other task will store only property values within 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:

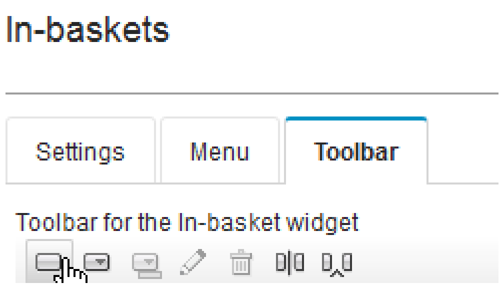
By configuring the In-baskets for the CSR role in Push Notification, we will provide the user the ability to process work items automatically without having to pick one from the queue. This is a very common scenario for "heads down" knowledge workers.

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.

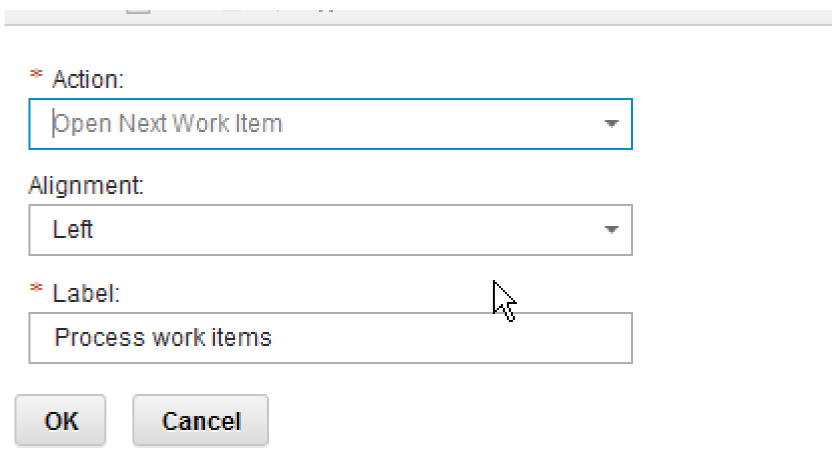
In the Settings tab, configure the Select the work mode to "Hide work items in role in-baskets" and Provide the instructions to worker to process the work items:



In the Toolbar tab, click on the Add button:

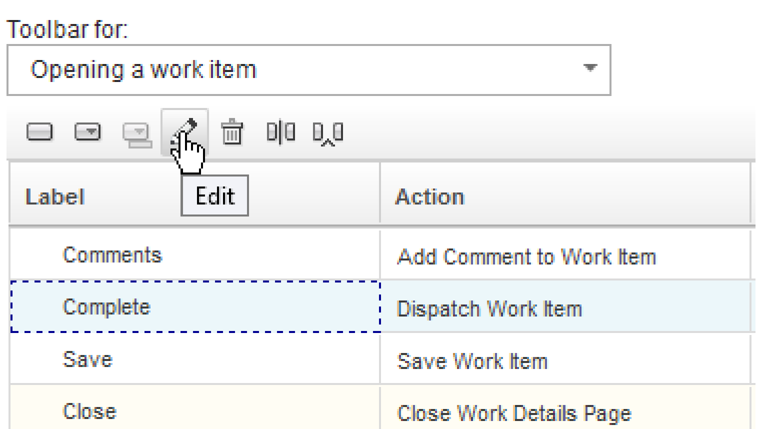


Select the action as “Open Next Work item” and set the Label to Process work items:

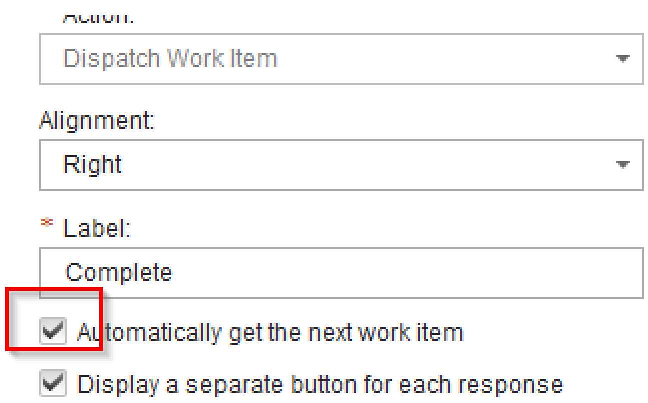


Click OK twice and Save and Close the page.

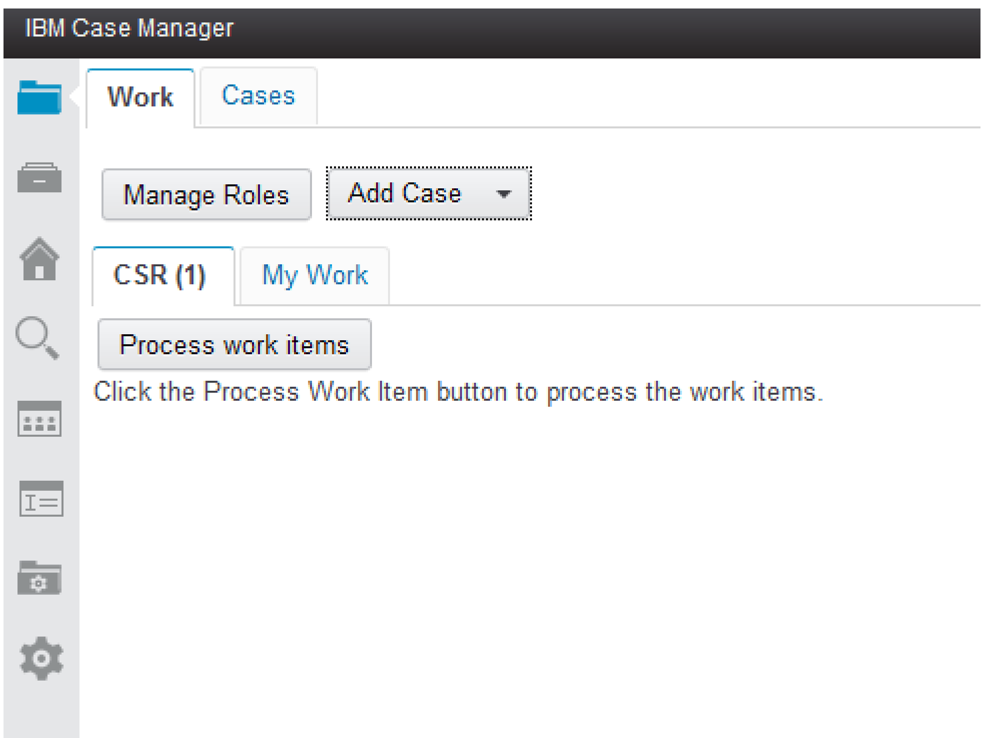
Open the Verification Work Details page in the Page Designer. Click on Edit Settings of the Work Item Toolbar. In the Toolbars tab, select the Complete label and click on Edit (the pencil icon):



Check the selection for getting the next work item automatically



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.