IBM

IBM Case Manager 5.2.1 Enablement

Lab

Adding External Documents in Case and Attachments

Contents

Before You Begin

Introduction

This hands on lab for Adding External Documents to a Case is meant for Business Analysts and Solution developers who want to reference documents from external repositories such as CM8, CMOD or CMIS enabled repositories in the case. In this lab, we will integrate a Case Management Solution with Alfresco CMIS repository and add documents from Alfresco to a case folder.

Documentation Conventions

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

Convention	Explanation
Bold	Words that appear in boldface represent menu options, buttons, icons, or any object you click to cause the software to perform a task. This typeface also represents anything that you must type or enter.
italics	In addition to book titles, italics are used to emphasize certain words, especially new terms when they are first introduced.
Note	This signifies information that emphasizes or supplements important points of the main text.
Important	This signifies information essential to the completion of a task. You can disregard information in a note and still complete a task, but you should not disregard an important note.
Caution	This alerts you to follow a recommended procedure carefully. Failure to do so may result in installation or configuration problems or other preventable conditions.

Tip	This suggests alternative methods that may not be obvious and helps you understand the benefits and capabilities of a feature or function. A tip is not essential to the basic understanding of the text.
❒	This symbol indicates the end of a note, caution, or tip.

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

Adding External Documents to a Case

In the labs for this unit you will configure a CMIS repository, make it available to the Case Management desktop and configure the solution to allow documents from the CMIS repository to be part of a case.

What you'll learn in this section:

1.   How to configure a CMIS repository (Alfresco) in Content Navigator and Add the CMIS repository to the case manager desktop

2.   Enable a case management solution to allow external documents in the case

3.   Create a case and add documents from Alfresco repository to the case

Exercise 1 – Configure a CMIS repository

1. Start Alfresco by running the batch file on the desktop. First we will test Alfresco and create a user in the Alfresco repository.
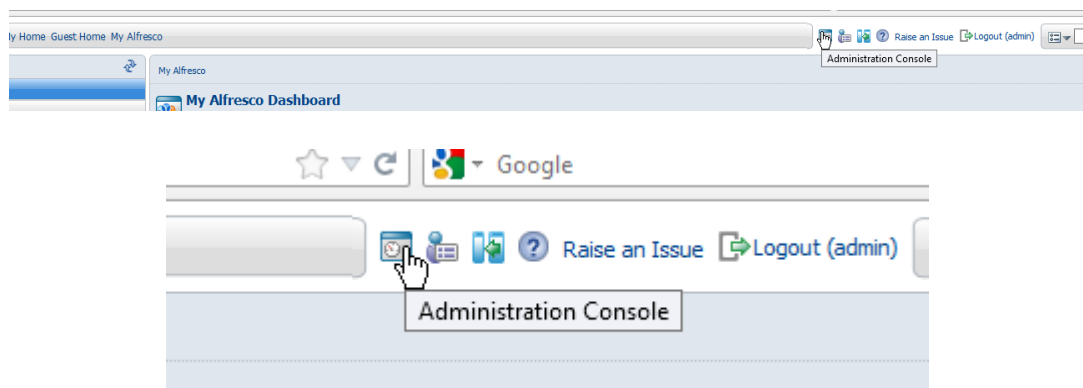

Step	Action
1	Navigate to the Alfresco URL to ensure that the server is accessible: http://localhost:8080/alfresco Click on Login link
2	Enter the credentials to login: admin/filenet. After logging in, click on the Administration Console icon to create a new Alfresco user
3	Click on Manage System Users

4

My Alfresco

Administration Console
Use this view to perform system administration functions.

Manage System Users

Manage User Groups

Category Management

Import

Export

System Information

Node Browser

Click on Create User

Create User | User [

st name and/or user name. Alternatively to see all users click 'Show All', however, this may take some time if there are a lot of users in the system.

v All
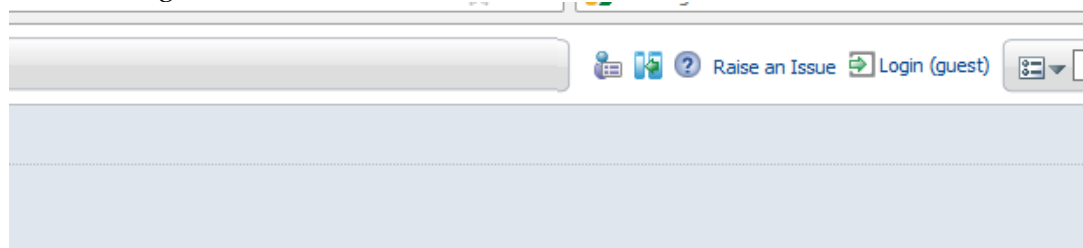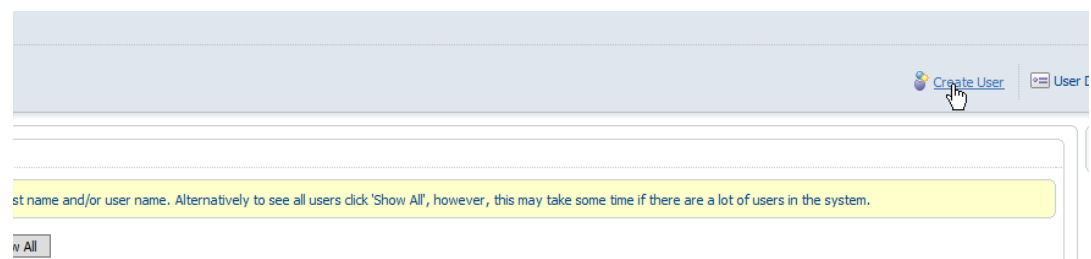
5 Enter the details as shown below and click Next

Step One - Person Properties
Enter information about this person.

Person Properties

	First Name:	P8Admin
	Last Name:	P8Admin
	Email:	p8admin@ecm.ibm.local

6	Enter username as P8Admin and password filenet. Set the Home Space Name to P8Admin and click Next

Step Two - User Properties
Enter information about this user.

User Properties

⊗	User Name:	P8Admin
⊗	Password:	••••••
⊗	Confirm:	••••••

Home Space

| Home Space Location: | User Homes |
| Home Space Name: | P8Admin |

To continue click Next.

Review the Summary and click Finish

Summary
The information you entered is shown below.

Name:	P8Admin P8Admin
User Name:	P8Admin
Password:	********
Home Space:	P8Admin
Email:	p8admin@ecm.ibm.local
Organization:	
Job Title:	
Location:	
Presence Username:	
Quota:	

7	Login to the admin desktop of IBM Content Navigator: http://ecmdemo1.ecm.ibm.local:9080/navigator?desktop=admin using credentials P8Admin/filenet

8	Click on Repositories and create a new CMIS repository as shown below
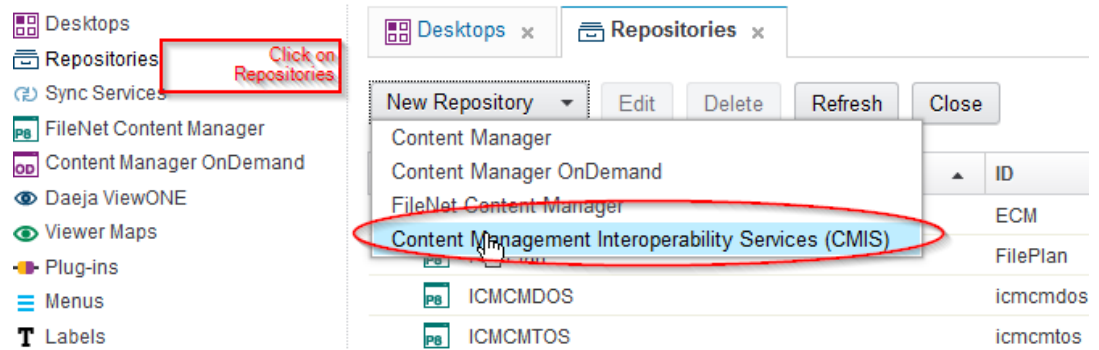
9	Enter the details as shown below and click Connect.

Enter the user credentials to connect to the Alfresco repository as P8Admin/filenet

10   Upon successful connection, you will notice the remaining tabs enabled in Content Navigator. Click on the tabs and view the configuration settings. Click Save and Close to save the repository settings

The Next step is to expose the CMIS Alfresco repository to the Case Manager desktop.

Step	Action

11   Click on Desktop and choose the Case Manager desktop and click Edit
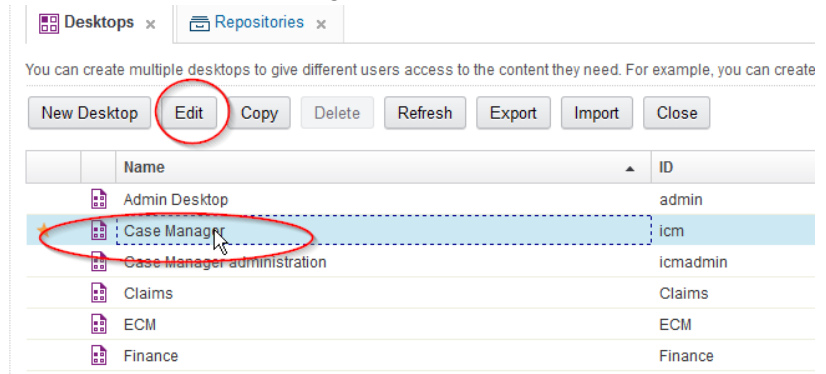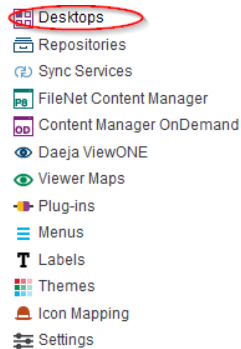
12   Click on the Repositories tab, and move the Alfresco repository from the Available list to the Selected list.

Click on Save and Close to save the configuration changes.

Exercise 2 – Enable the Case management solution to include external documents

In the previous exercise we configured the Alfresco repository and added it to the Case Manager navigator desktop. The Case manager navigator desktop is the Case client application. In this exercise, we will configure the solution to allow case workers to add documents from the Alfresco CMIS repository.

In this exercise, we will work with the Abyss Spill Claims Management Solution.

Step	Action
1	Login to the Case Builder by going to the URL: http://ecmdemo1.ecm.ibm.local:9080/CaseBuilder and use credentials p8admin/filenet
2	Open the Abyss Spill Claims solution and click on the Case Types → Boat Damage case type:
3	Enable the check box to allow documents from external repository to be included in the case as shown below:

Step	Action

4	Click on Save and Close

Summary

In this section you:

- Configured the Case Type to include external documents in the case

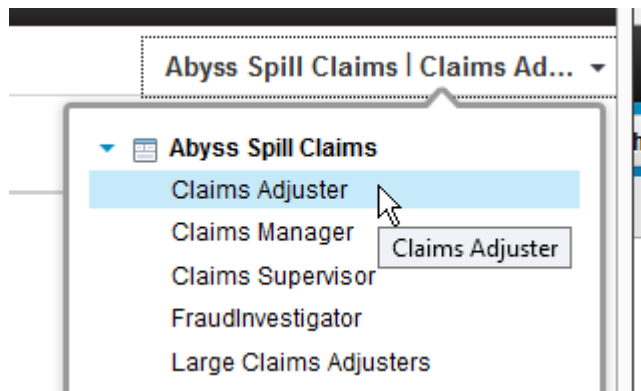## Exercise 3 – Create a case and include external documents in the case

In this step, we will deploy the solution after making the required changes in Exercise 2, create a case and search for a document to be included in the case. Although we are directly adding documents to the case, tasks with attachments can reference documents in the external repository as well.
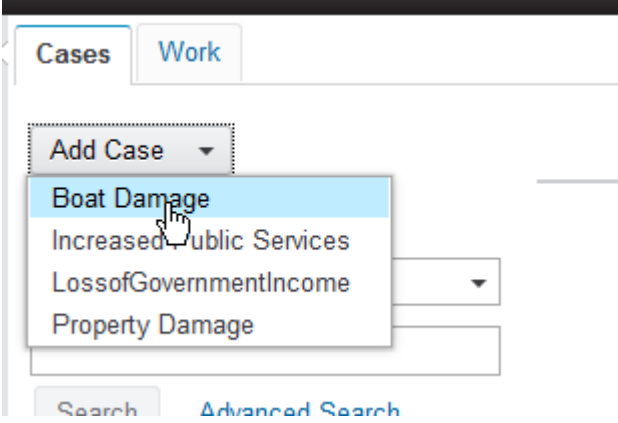
Step	Action
1	Deploy the Abyss Spill Claims solution:
2	After successful deployment, click on the Test link to launch the Case Client. Switch role to Claims Adjuster:
3	Click on the Cases tab and click on Add Case → Boat Damage

Step	Action

4   Enter the following Case Details in the Add Case Page:

Step	Action

Click on Add to create a case
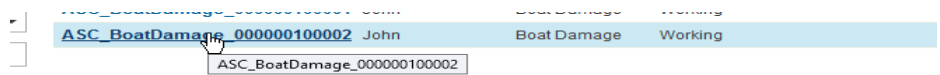
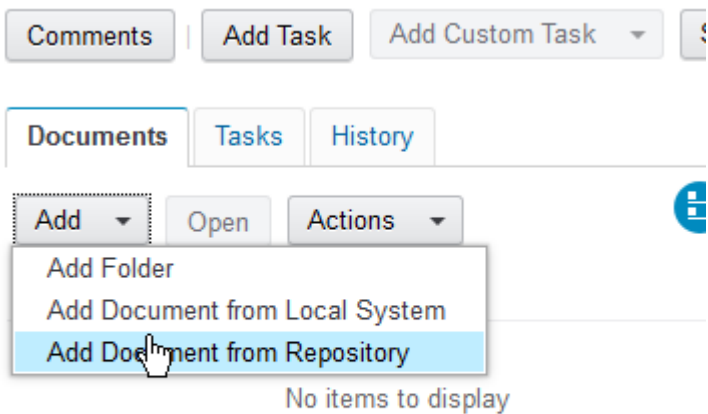| **5** | Search for the newly created case in the Cases Page |

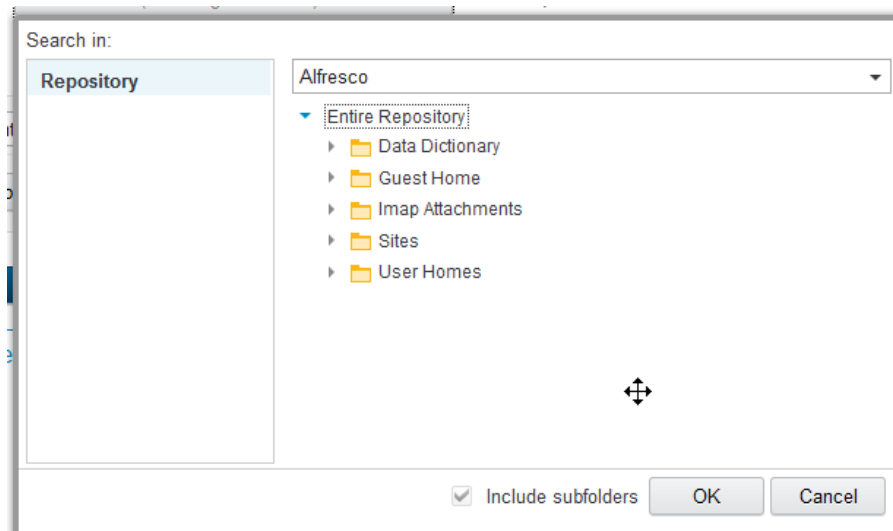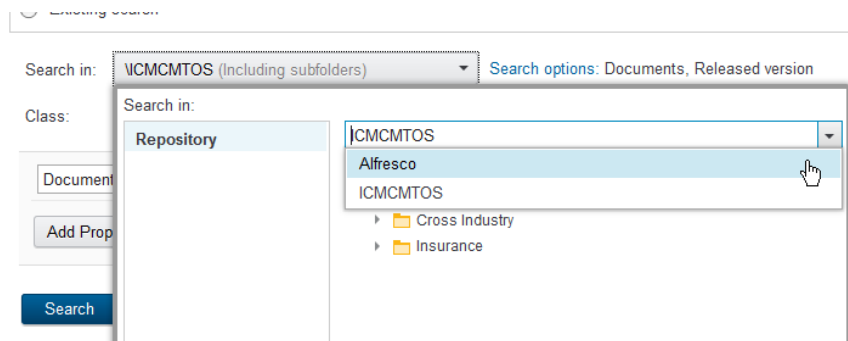| Step	Action
6	Open the Case to view the Case Details:
7	In the Documents tab, select the Claims Submission folder and click on the Add → Add Document from Repository:

Step	Action
6	Select the Alfresco repository to search documents and click OK

7	Under the selection criteria, choose the Name property

Step	Action
8	Enter the search criteria as below and click on Search

Step	Action
9	Select the turbine.jpg and click OK
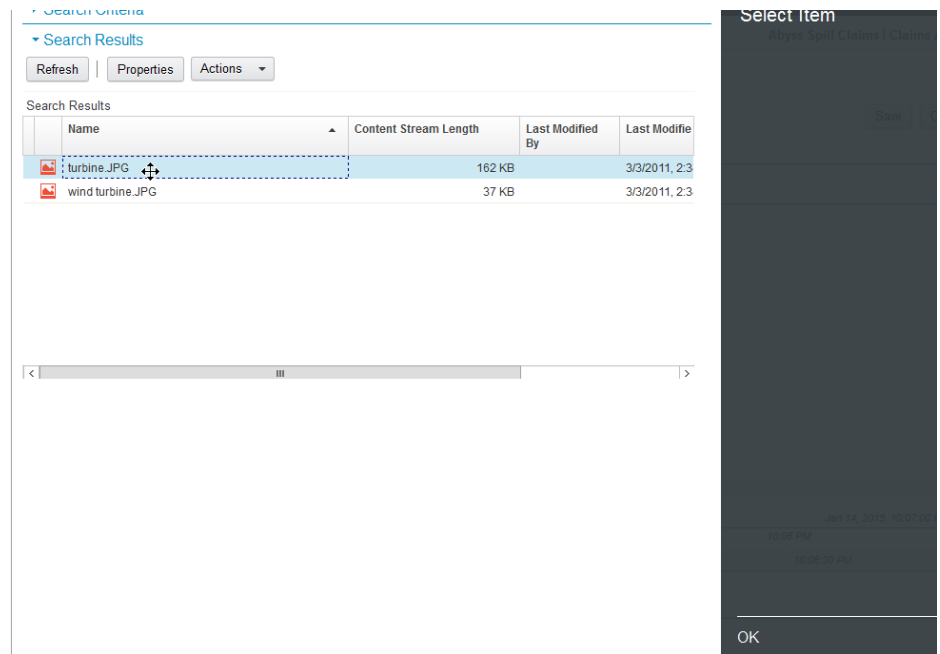
Notice, that the document is now added to the case.
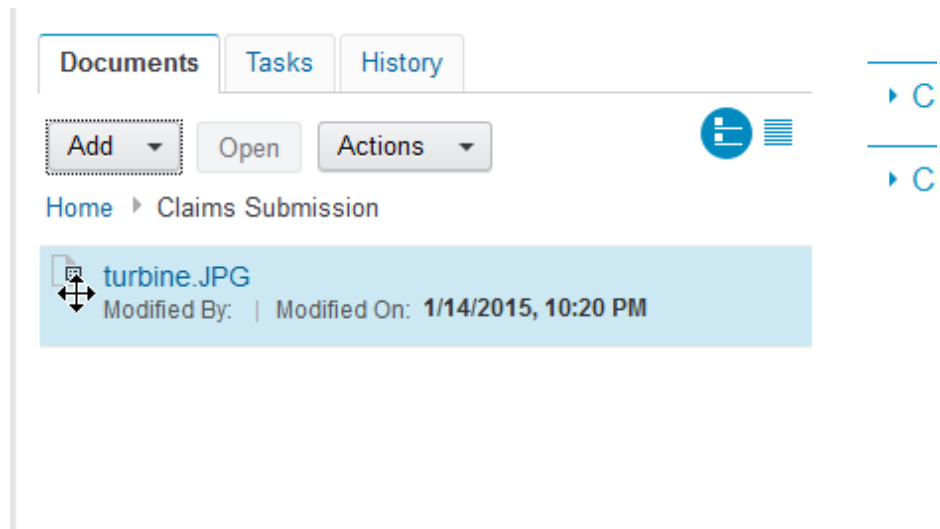
Right click on the document to view and explore the menu options.
Click on Save in the Case Details and close the Details page.

20

Stop the Alfresco application by running the Stop Alfresco server batch file from the desktop:

Summary

In this section you:

- Created a case and added a document from the Alfresco CMIS repository to the case.

For additional references:

- IBM Case Manager V5.2 Information Center – Designing the case management client application topic
  http://pic.dhe.ibm.com/infocenter/casemgmt/v5r2m0/topic/com.ibm.casemgmt.help.doc/acmwrh00.htm

- Selected sessions from IBM Case Manager V5.2.1 Product Implementation and Maintenance Training (PIT / PMT):

  02-ICM 5.2.1 External Documents in Case and Attachments.ppt