IBM Case Manager 5.2.1 Enablement

Lab

Customizing Case Client with Property View Designer

© Copyright IBM Corp. 2013

Contents

© Copyright IBM Corp. 2013

Before You Begin

Introduction

This hands on lab for Customizing Case Client with Property View Designer is meant for the Application Developer to learn about how to work the property view designer.

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.

AD4

Customizing Case Client with Property View Designer

In the labs for this unit you will customize Case Client with Property View Designer.

What you'll learn in this section:

1. How to design a custom view.
2. How to configure the default view for a case type.
3. How to override the default view in a Properties widget.
4. How to use External Properties in the display of the Properties Widget.

© Copyright IBM Corp. 2013

Exercise 1 – Designing a custom view

In this exercise, you will create a new view.

Within the Case Manager Builder, the Business Analyst can configure which properties are displayed in these widgets. In this exercise, you will use Case Manager Builder to see how the author of this solution configured those widgets for your **Credit Card Disputes HOL** solution.

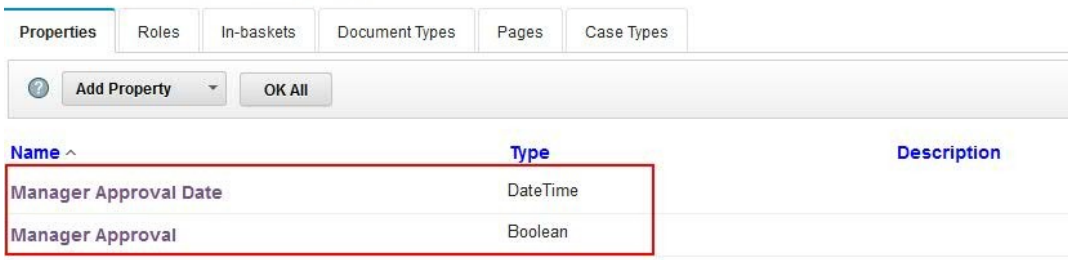
Augmenting the system-generated view is useful for many different scenarios. For example, the business analyst may want to include only a subset of case properties in the case type, control the ordering of case properties in the case type, or place the case properties into a layout which includes multiple columns and tabs. In addition, the business analyst may need to set up different views for each role.

The Properties View Designer can create any number of custom views for each case type. Before accessing the Properties View Designer, ensure that the desired case properties are in the Properties page for a case type in Case Manager Builder.

Step	Action
1	Navigate to Case Manager Builder by copy and pasting the URL below into Firefox. http://localhost:9080/CaseBuilder
2	Log in as **P8Admin** using the password **filenet.**
3	Edit the **Credit Card Dispute HOL** solution and select the **Properties** tab.

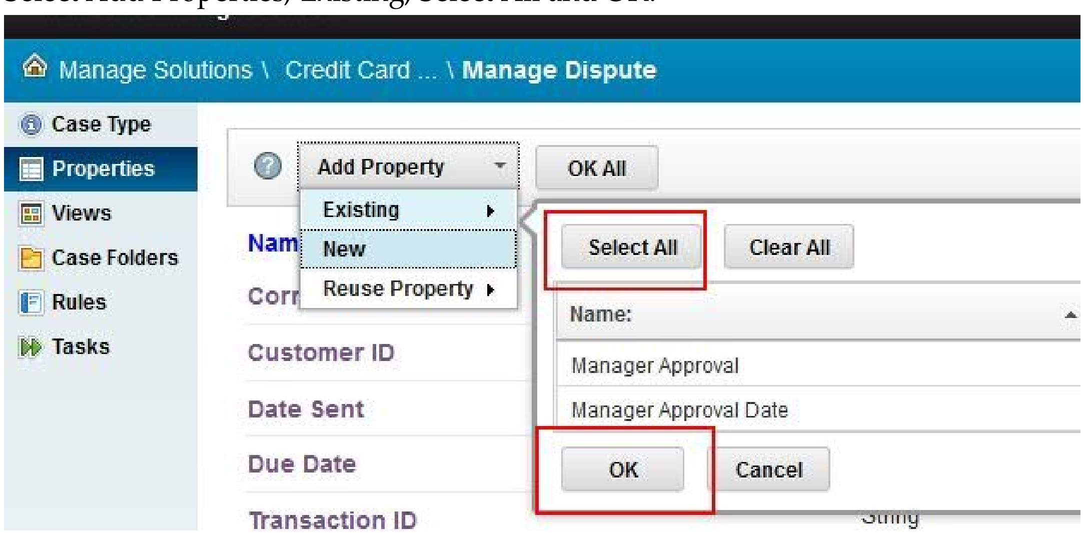
© Copyright IBM Corp. 2013

4	Add two new properties: Manager's Approval – Boolean Manager's Approval Date – DateTime



5	Navigate to the **Case Types** tab and then click on **Manage Dispute**.
6	Select **Properties** on the left hand side of the screen

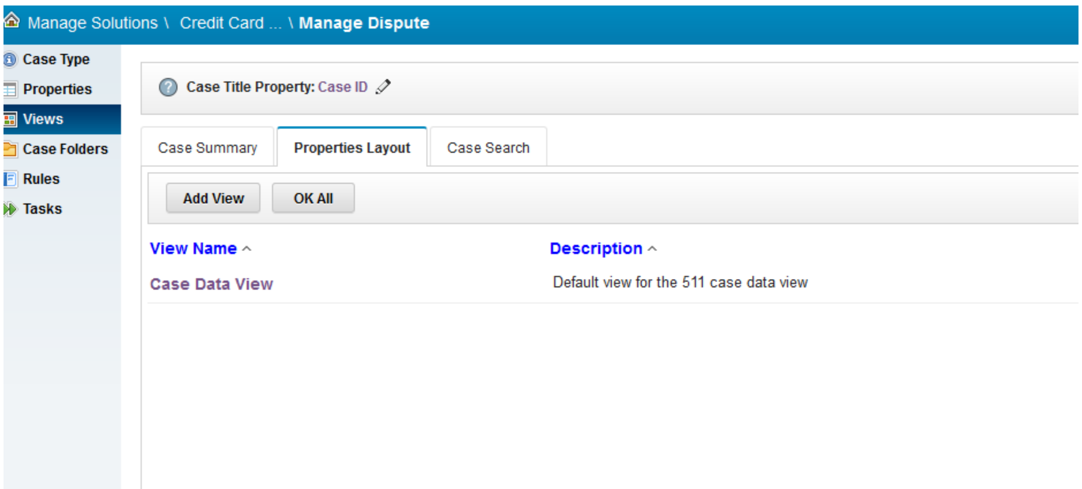
Select Add Properties, Existing, Select All and OK.



7	Select the OK All button at the top.
8	Select **Views** on the left hand side of the screen
9	Make sure the **Case Summary** tab is selected
10	Notice that the **Customer ID, Transaction ID, and Due Date** properties appear on the right hand side of the screen, meaning that they will appear along with a number of system properties in the Case Summary view.

© Copyright IBM Corp. 2013

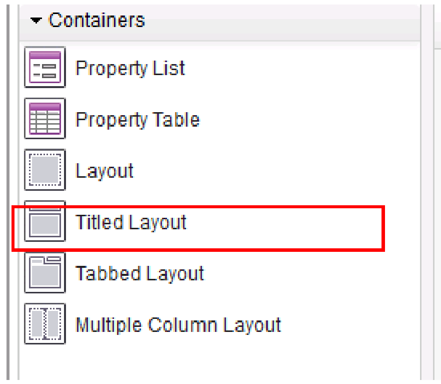
Next you will inspect the view for the **Properties Layout** widget. This widget provides more details on the case and allows you to edit property values. Notice how properties are grouped here to improve the layout of the information. A default Case Data View is provided by the system however the business analyst can define a custom view and re-arrange the layouts of the properties.

Step	Action
11	From the **Views** section, click the **Properties Layout** tab. Click on the **Case Data View** to open the **Property View Designer**. 

© Copyright IBM Corp. 2013

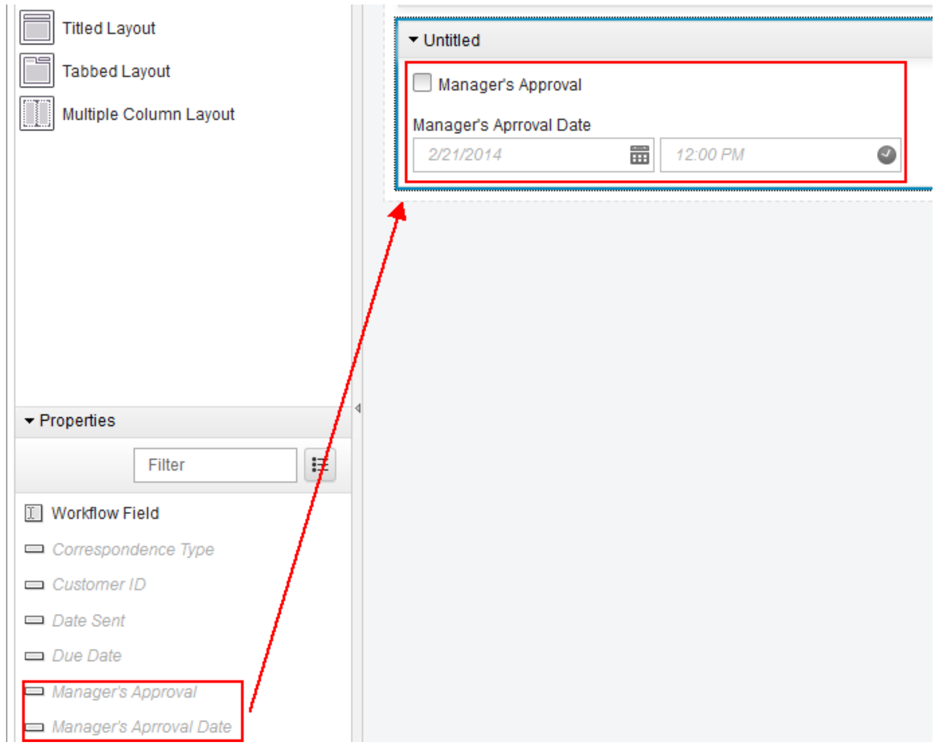
12 In the view designer, you will see a palette on the left, the canvas in the center and the properties pane on the right. By dragging and dropping the layouts from the palette in the canvas, you can construct the user interface for the Case Properties.

Start by dragging the **Titled Layout** container to the main layout area.

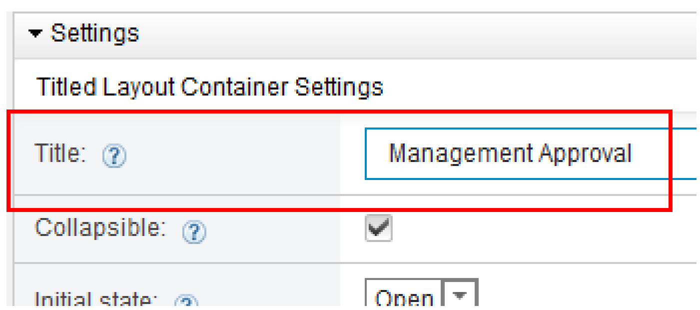


© Copyright IBM Corp. 2013

13 Drag and drop Manager's Approval and Manager's Approval Date properties from the Properties section into the new Titled Layout container from the previous step.

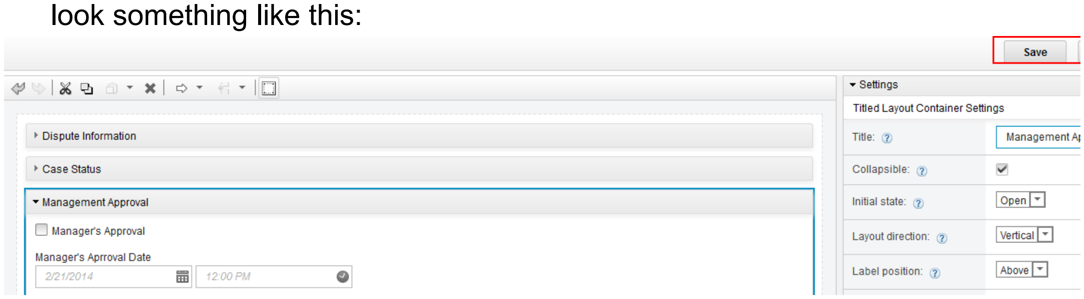


14 In the Settings section, make sure to change the Title to Management Approval.



© Copyright IBM Corp. 2013

15 Click the **Save** button and click the **Close** button. Your newly created view should look something like this:



Exercise 2 – Configuring the default view for a case type

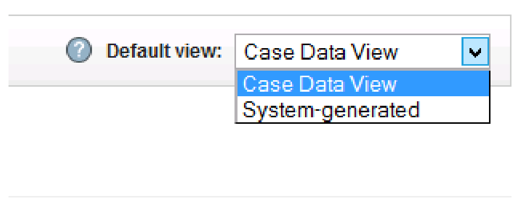
The default view can be accessed through the Views tab within a specific case type. Selecting a default view, whether it is the system-generated view or the

© Copyright IBM Corp. 2013

default view, renders that view for all the pages that the Properties widget is on. Alternatively, you may specify what view to show on a specific page through the Edit Settings window on the Properties widget.

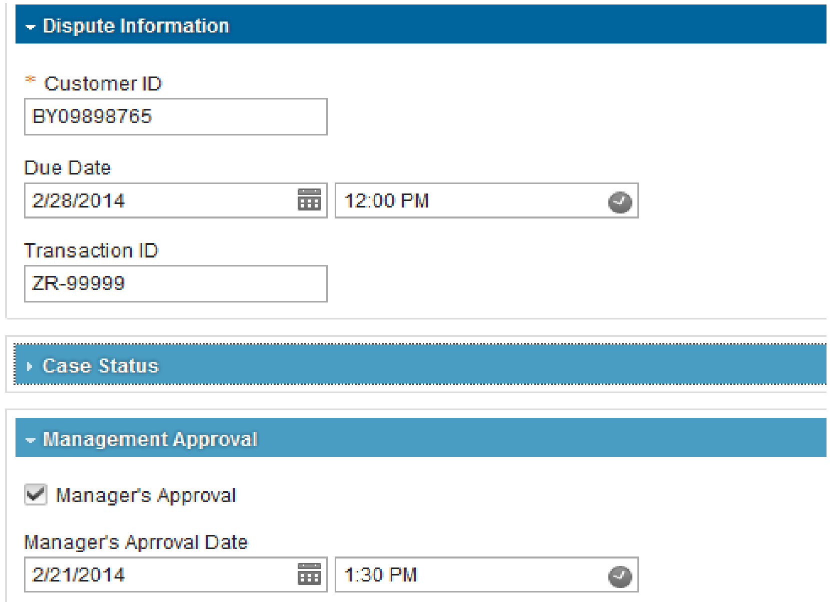
Note: The following is the recommended approach for configuring the Properties widget view:
You may configure either the system-generated view or a custom view as the default view for a particular case type. The default view is rendered in the Properties widget whenever the Properties widget is not specifically configured to render another view.

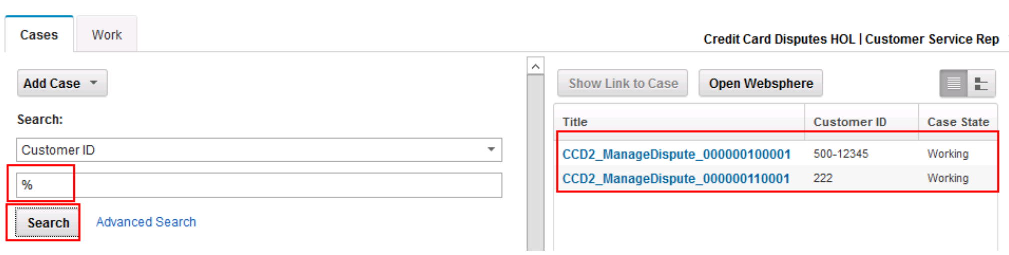
By default, the default view for a case type is the system-generated view. The system-generated view displays each property in the case type vertically without any custom layout.
To configure the default view for a case type, follow these steps:

Step	Action
1	On the Properties Layout tab, ensure that the default view is set to the newly created custom view. This renders the properties layout with the newly created custom view. 
2	After setting the default view of a case, validate in Case Manager Client that the custom view selected as the default view shows up in the Case Details page. Click the **Save and Close** button in the top right.
3	On the Case Manager Builder page, click **Deploy** and confirm your changes. Wait for the green check mark icon to appear on the Credit Card Disputes HOL solution.
4	Click the **Test** button on the Credit Card Disputes HOL solution to open Case Manager Client.
5	Make sure you are in the CSR role.
6	Click on the Add Case button and select Manage Disputes.

© Copyright IBM Corp. 2013

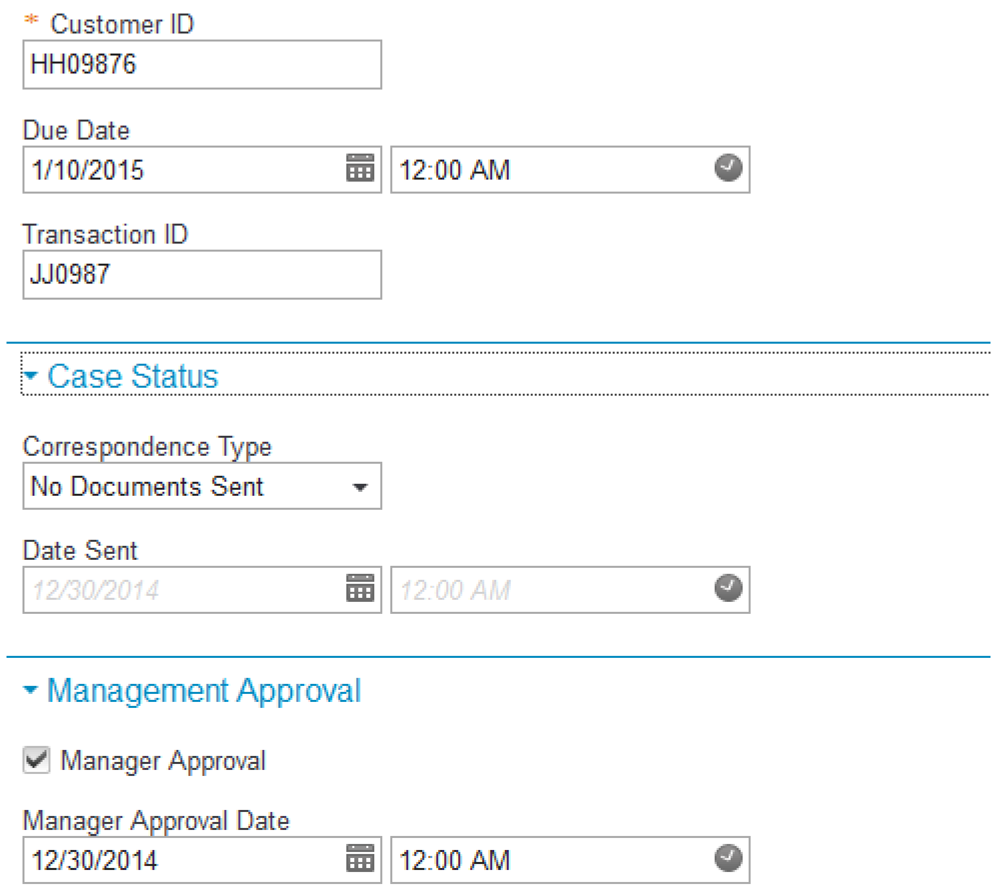
Step	Action
7	Enter a Customer ID, Due Date, and Transaction ID. Check the Manager's Approval box, and add the Manager's Approval Date.
8	Click the Add button in the upper right corner.
9	Go to the Cases page.
10	Enter % in the Search widget on the **Cases** page to do a wild card search. Then, click on a case in the Case List widget on the Cases page.





© Copyright IBM Corp. 2013

Step	Action
11	Upon opening the Case Details page, notice that the Properties widget displays your newly created custom view.



Summary

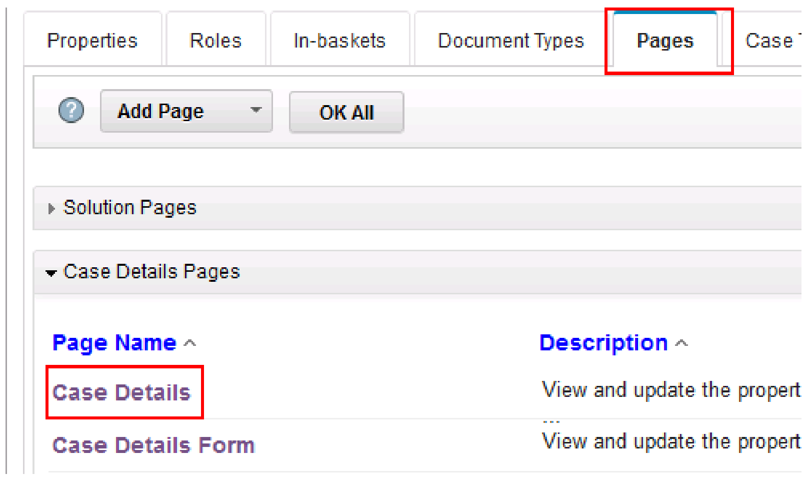
In this section you:

- configured the default view for a case type

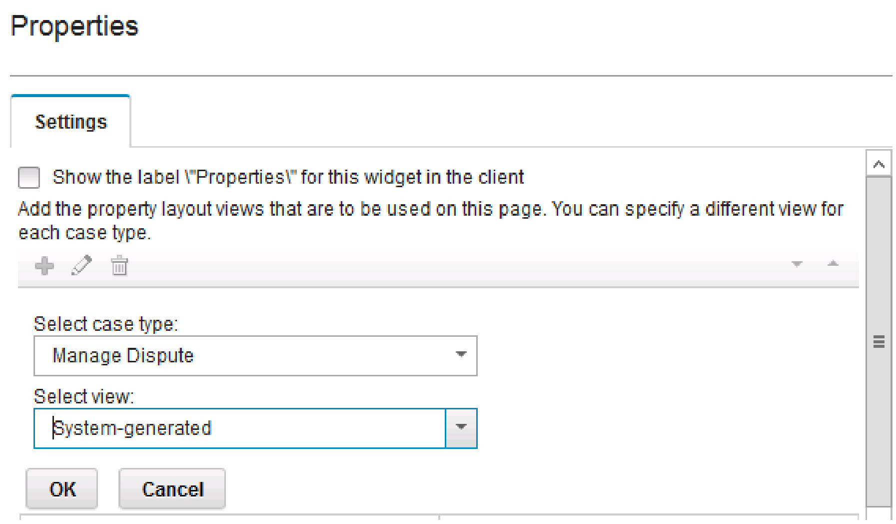
© Copyright IBM Corp. 2013

Exercise 3 – Overriding the default view in the Properties widget

In some cases, you may want the Properties widget to render a different view than the default view for a particular case type. You can configure the Properties widget to render either the system-generated view or a specific custom view.

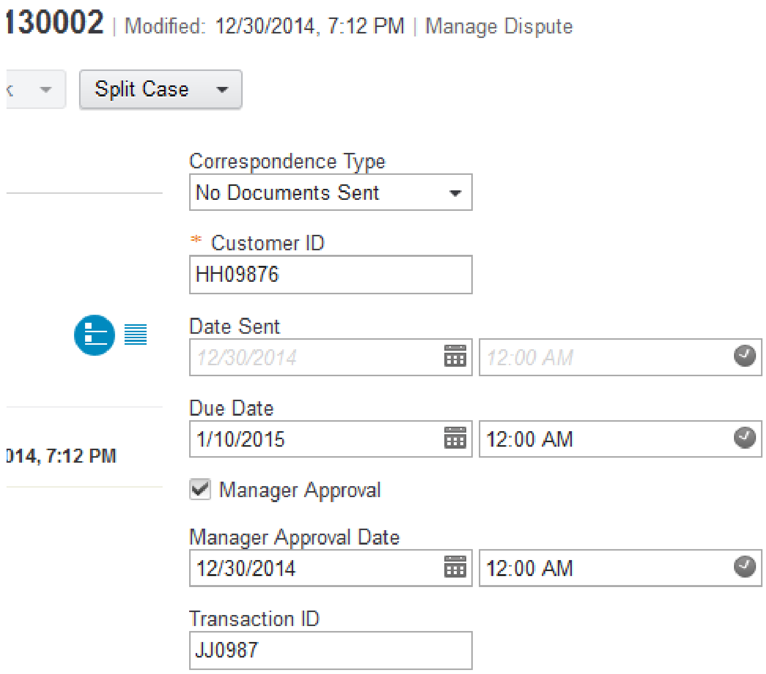
Step	Action
1	On the Case Manager Builder page, click on the **Edit** button of the Credit Card Disputes HOL solution.
2	Navigate to the **Pages** tab and click on **Case Details Pages** to expand it. Click on **Case Details** to open page designer. 
3	Within Page Designer for a Case Details page, click the **Edit Settings** icon for the Properties widget. 

© Copyright IBM Corp. 2013

Step	Action
4	In the settings pop-up window for the Properties widget, click the **Add** icon to tell the Properties widget to override the default view set for this specific page. Then, select **Manage Dispute** for the case type and select **System-generated** for the view. 
5	Click the **OK** button to add the view. Then click the **OK** button again to close the Properties window.
6	Click the **Save** button and click the **Close** button to exit Page Designer. Click the **Save and Close** button to exit the solution. **Deploy** your changes for the Credit Card Disputes HOL solution.
7	Click on the **Test** icon after the solution is done deploying. Then navigate to the **Case Details** page again by doing a wild card search in the Search widget and clicking on a case.

© Copyright IBM Corp. 2013

Step	Action
8	Note that the Properties widget now shows the system-generated view on this page even though you set the default view to be your custom view. This is how you override the default view. The system-generated view lists the properties in a vertical fashion without containers.



Summary

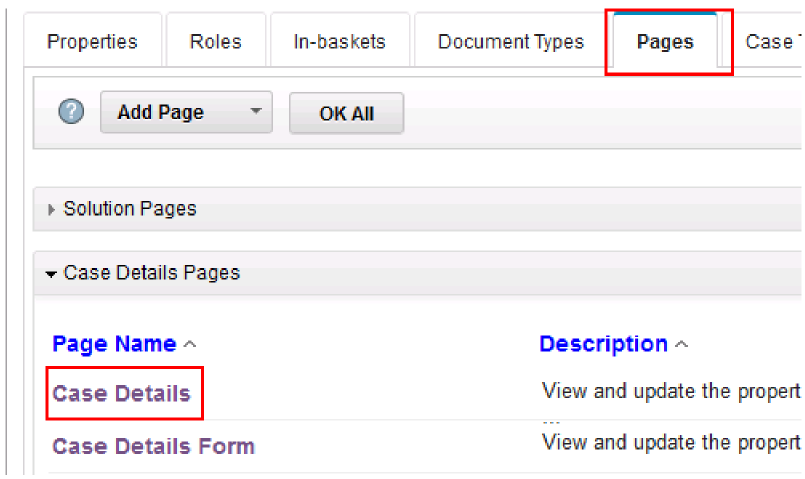
In this section you:

- overrode the default view

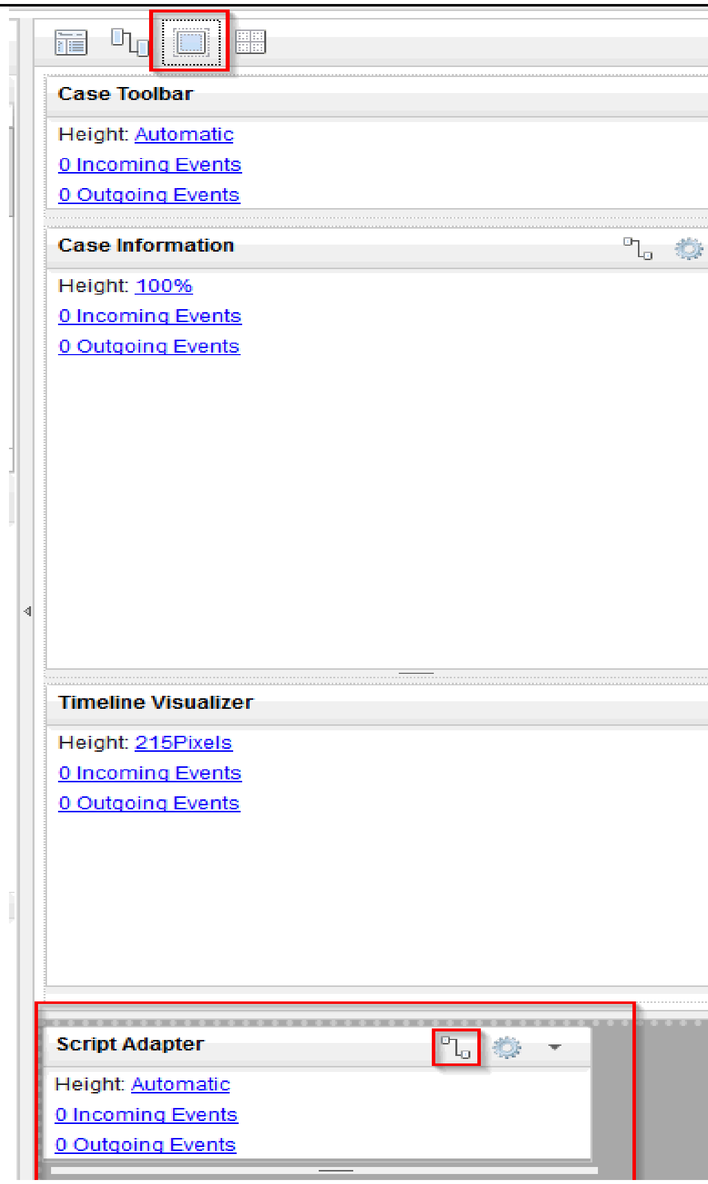
© Copyright IBM Corp. 2013

Exercise 4 – Using External Properties in IBM Case Manager v5.2.1 – Adding external properties to the System-generated Properties View.

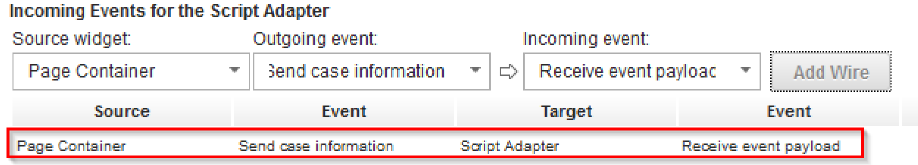
In many companies, vital data is stored one place, and all other systems are required to use it. In version 5.2.1, the IBM Case Manager allows the use of external properties for this data in the properties view. This data can be accessed through a java servlet, JSON file on a mid-tier server, or an in-line script.   The following labs provides a simple example of how to display external properties in the Properties Widget's system-generated view or a specific custom view.

Step	Action
1	On the Case Manager Builder page, click on the **Edit** button of the Credit Card Disputes HOL solution.
2	Navigate to the **Pages** tab and click on **Case Details Pages** to expand it. Click on **Case Details** to open page designer. 
3	In the Page Designer, click on the show hidden widget button on the top of the page, and copy a script adapter widget to the hidden widget area at the bottom of the screen.

© Copyright IBM Corp. 2013

Step	Action
	
4	Next, click on the wiring Edit Wiring icon for the Script Adapter widget.
5	For the incoming events for the Script Adapter, wire the **send case information** widget event.

© Copyright IBM Corp. 2013

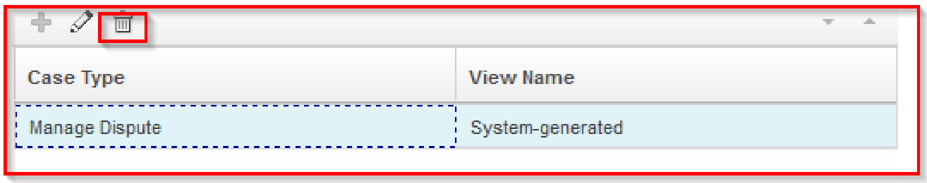
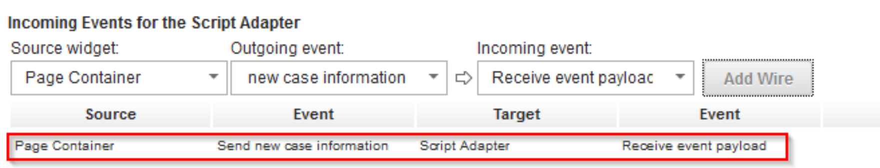
Step	Action
	 Click OK.
6	Click the Edit Settings icon on the Script Adapter widget, remove the existing text from the Javascript window, and paste the following JavaScript into the window.

7	require([
	"icm/model/properties/controller/ControllerManager",
	"icm/base/Constants"
	], function(ControllerManager, Constants) {
	// Get the editable and coordination objects from the event payload.
	var coordination = payload.coordination;
	var editable = payload.caseEditable;
	var model;
	// Participate in the BEFORELOADWIDGET topic to bind the external
	// properties into the controller.
	payload.coordination.participate(Constants.CoordTopic.BEFORELOADWIDG
	ET,
	function(context, complete, abort) {
	model = {
	properties: {
	"PhoneNumber": {
	id: "PhoneNumber",
	name: "Phone Number",
	type: "string",
	cardinality: "single",
	value: "949-559-2213"
	}
	}
	};
	var collectionController = ControllerManager.bind(editable);
	collectionController.bind("External", "External", model);
	complete();
	});
	// Participate in the AFTERLOADWIDGET topic to release the controller
	binding.
	payload.coordination.participate(Constants.CoordTopic.AFTERLOADWIDGE
	T,
	function(context, complete, abort) {
	ControllerManager.unbind(editable);

© Copyright IBM Corp. 2013

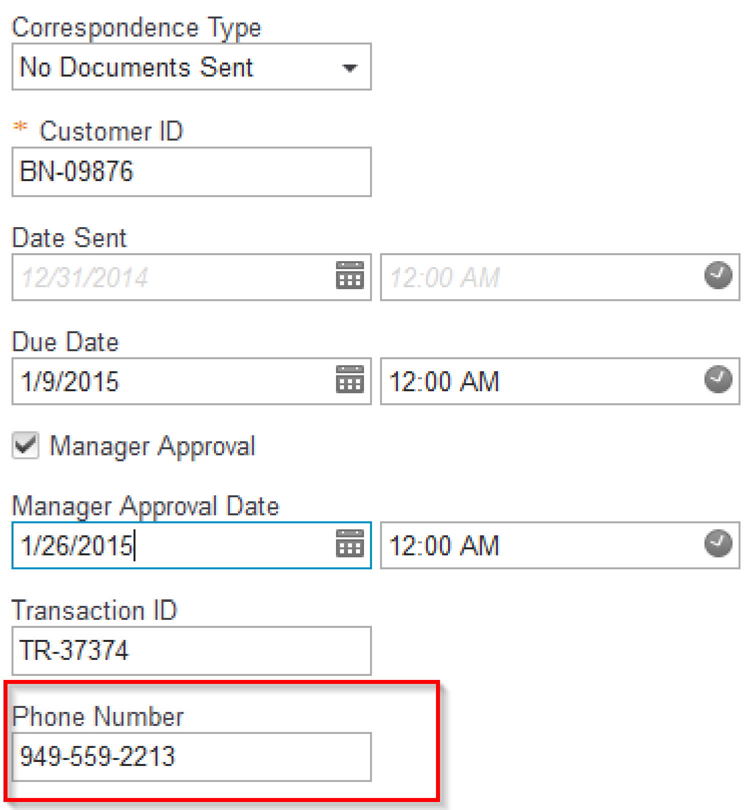
Step	Action
	complete(); }); });

© Copyright IBM Corp. 2013

Step	Action
8	Click OK.
9	Within Page Designer for a Case Details page, click the **Edit Settings** icon for the Properties widget.
10	Delete the entry for Managed Disputes/System-generated (from the last lab).  Click OK. Save and Close the Page Designer.
11	In the Add Case Pages box, click on Add Case and open the Page designer.
12	In the Page Designer, click on the show hidden widget button on the top of the page, and copy a script adapter widget to the hidden widget area at the bottom of the screen. Next, click on the wiring Edit Wiring icon for the Script Adapter widget.
13	For the incoming events for the Script Adapter, wire the **send new case information** widget event.  Click OK.
14	Click the Edit Settings icon on the Script Adapter widget, remove the existing text from the Javascript window, and paste the JavaScript from Step 7 above into the window.
15	Click OK. Save and Close the Page Designer.
16	Navigate to the **Case Types** tab and then click on **Manage Dispute**.
17	On the Properties Layout tab of Views, ensure that the default view is set to System-generated.

© Copyright IBM Corp. 2013

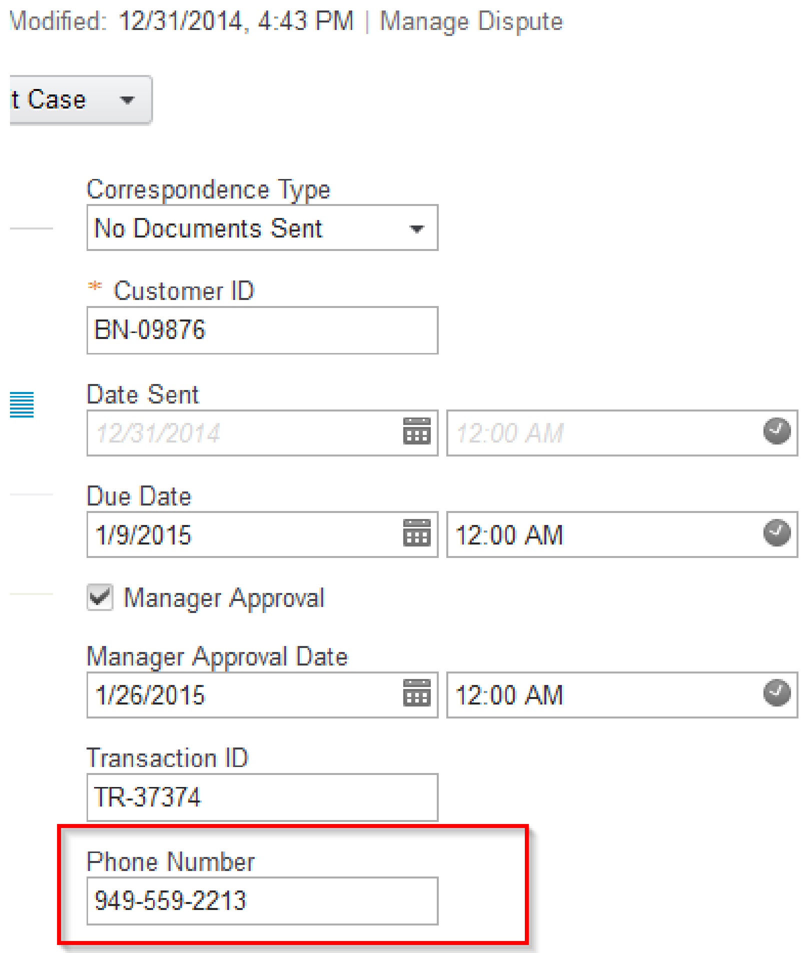
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>18</td><td>Click the Save and Close button. On the Case Manager Builder page, click Deploy and confirm your changes. Wait for the green check mark icon to appear on the Credit Card Disputes HOL solution.</td></tr>
<tr><td>19</td><td>Click on the Test icon after the solution is done deploying. Click on the Add Case button, and select Manage Disputes.</td></tr>
<tr><td>20</td><td>Fill in the properties. Notice that the external property Phone Number is displayed.



Click Add.</td></tr>
<tr><td>21</td><td>Navigate to the Case Details page by doing a wild card search in the Search widget and clicking on the case you just created.</td></tr>
<tr><td>22</td><td>Notice that the external property Phone Number also appears in the system-generated property view.</td></tr>
</table>

© Copyright IBM Corp. 2013

Step	Action

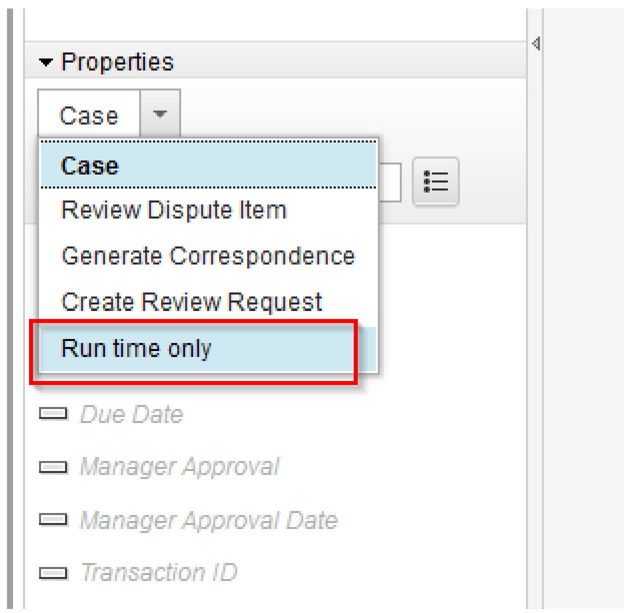


Step	Action
	Click Close.
23	Close the Case Client.
	Summary
	In this section you: • configured the Add Case and the Case Detail pages to display an external property in the System-generated properties view.

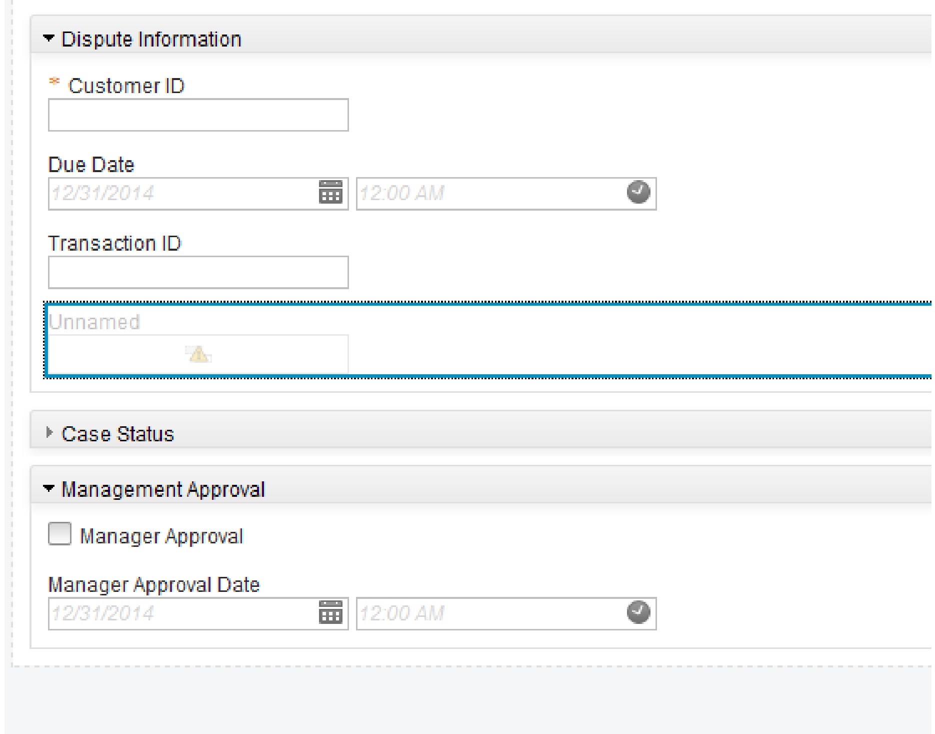
© Copyright IBM Corp. 2013

Exercise 5– Using External Properties in IBM Case Manager v5.2.1 – Adding external properties to a Custom Properties View.

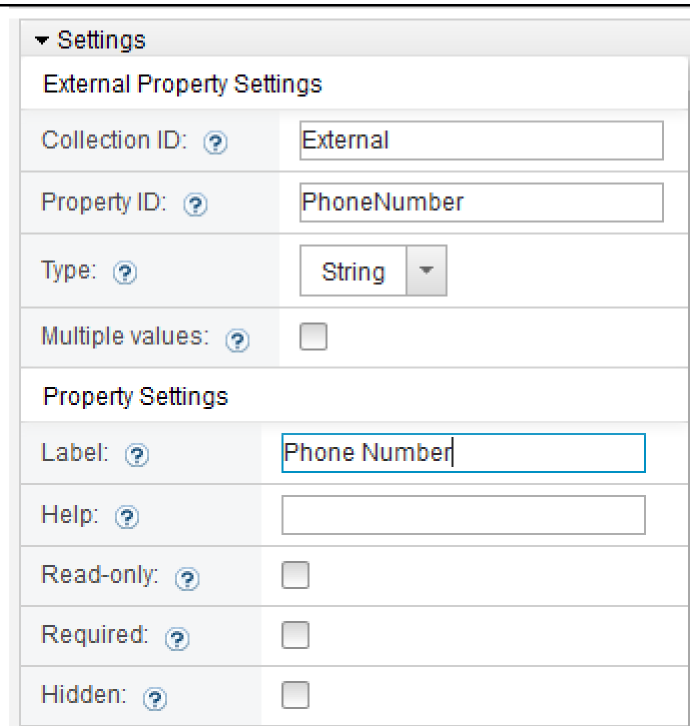
The following lab provides a simple example of how to display external properties in the Properties Widget's specific custom view.

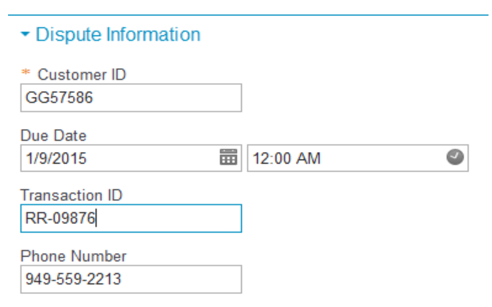
Step	Action
1	On the Case Manager Builder page, click on the **Edit** button of the Credit Card Disputes HOL solution.
2	Navigate to the **Case Types** tab and then click on **Manage Dispute**.
3	On the Properties Layout tab of Views, click on the Custom Data View.
4	In the Properties palette, change the drop down to **Run time only**. 
5	In the Dispute Information layout container, add an External Property property under the Transaction ID property.

© Copyright IBM Corp. 2013

Step	Action
	
6	In the External Property Settings, enter External for the Collection ID, PhoneNumber for the Property ID, change the Type to String, and the label to Phone Number.

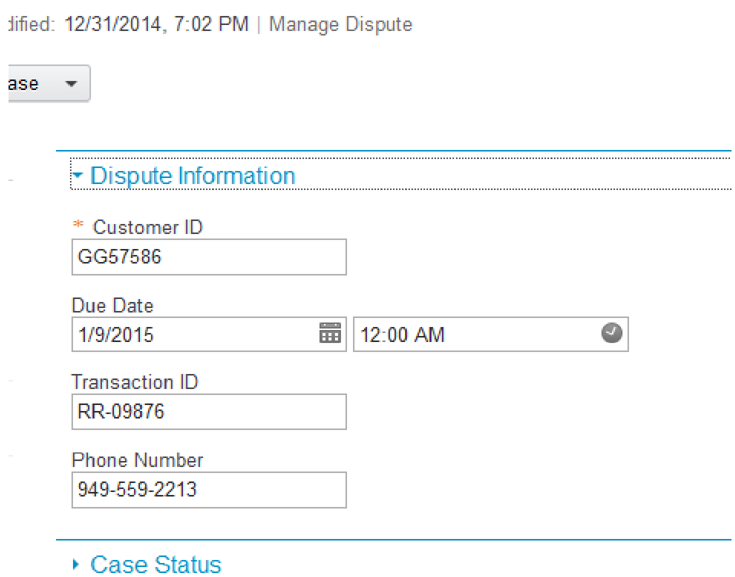
© Copyright IBM Corp. 2013

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>


</td></tr>
<tr><td>7</td><td>Save and Close the Properties View Designer. Change the Default View to Custom Data View.</td></tr>
<tr><td>8</td><td>Click the Save and Close button. On the Case Manager Builder page, click Deploy and confirm your changes. Wait for the green check mark icon to appear on the Credit Card Disputes HOL solution.</td></tr>
<tr><td>9</td><td>Click on the Test icon after the solution is done deploying. Click on the Add Case button, and select Manage Disputes.</td></tr>
<tr><td>10</td><td>Notice the external property Phone Number it the default value is displayed under the Transaction ID property. The Javascript from the Add Case page Script Adapter widget has matched the Collection ID External and the Property ID PhoneNumber.


Fill in the Customer ID, Due Date, and Transaction ID, and Click Add.</td></tr>
</table>

© Copyright IBM Corp. 2013

Step	Action
11	Navigate to the **Case Details** page by doing a wild card search in the Search widget and clicking on the case you just created.
12	Notice that the external property Phone Number property. This values comes from the java script in the Script Adapter Widget for the Case Details page. 
13	Close the Case Detail page, and close the Case Client.

Summary

In this section:

Used External Properties in a custom properties view of the Properties Widget.

© Copyright IBM Corp. 2013

Exercise 6– Using External Properties in IBM Case Manager v5.2.1 – Adding external properties collections to the System-generated view.

The following lab provides a simple example of how to display external properties in the Properties Widget's specific custom view.

© Copyright IBM Corp. 2013

Step	Action
1	On the Case Manager Builder page, click on the **Edit** button of the Credit Card Disputes HOL solution.
2	Navigate to the **Pages** tab and click on **Case Details Pages** to expand it. Click on **Case Details** to open page designer.
3	In the Page Designer, click on the show hidden widget button on the top of the page.

4	Click the Edit Settings icon on the Script Adapter widget, remove the existing text from the Javascript window, and paste the following JavaScript into the window.
	
	require([
	"icm/model/properties/controller/ControllerManager",
	"icm/base/Constants"
	], function(ControllerManager, Constants) {
	// Get the editable and coordination objects from the event payload.
	var coordination = payload.coordination;
	var editable = payload.caseEditable;
	var model;
	// Participate in the BEFORELOADWIDGET topic to bind the external
	// properties into the controller.
	payload.coordination.participate(Constants.CoordTopic.BEFORELOA
	DWIDGET,
	function(context, complete, abort) {
	model = {
	properties: {
	"description": {
	id: "description",
	name: "Description",
	label: "Description",
	type: "string",
	cardinality: "single",
	value: "description here"
	},
	"price": {
	id: "price",
	name: "Price",
	label: "Price",
	type: "float",
	cardinality: "single",
	value: 22.2
	},
	"booleantest": {

© Copyright IBM Corp. 2013

Step	Action

	id: "booleantest",
	name: "booleantest",
	label: "booleantest",
	type: "boolean",
	cardinality: "single"
	},
	"datetimeTEST": {
	id: "datetimeTEST",
	name: "datetimeTEST",
	label: "datetimeTEST",
	type: "datetime",
	cardinality: "single"
	},
	"quantityINT": {
	id: "quantityINT",
	name: "quantityINT",
	label: "quantityINT",
	type: "integer",
	cardinality: "single"
	},
	"total": {
	id: "total",
	name: "Total",
	label: "Total",
	type: "float",
	cardinality: "single",
	},
	"MyMultiInteger": {
	id: "MyMultiInteger",
	type: "integer",
	cardinality: "multi",
	value: [1, 2, 3]
	},
	"multiCategory": {
	id: "multiCategory",
	name: "MultiCategory",
	label: "MultiCategory",
	type: "integer",
	cardinality: "multi",
	choices: [{
	label: "Small",
	value: 0
	},
	{
	label: "Large",

© Copyright IBM Corp. 2013

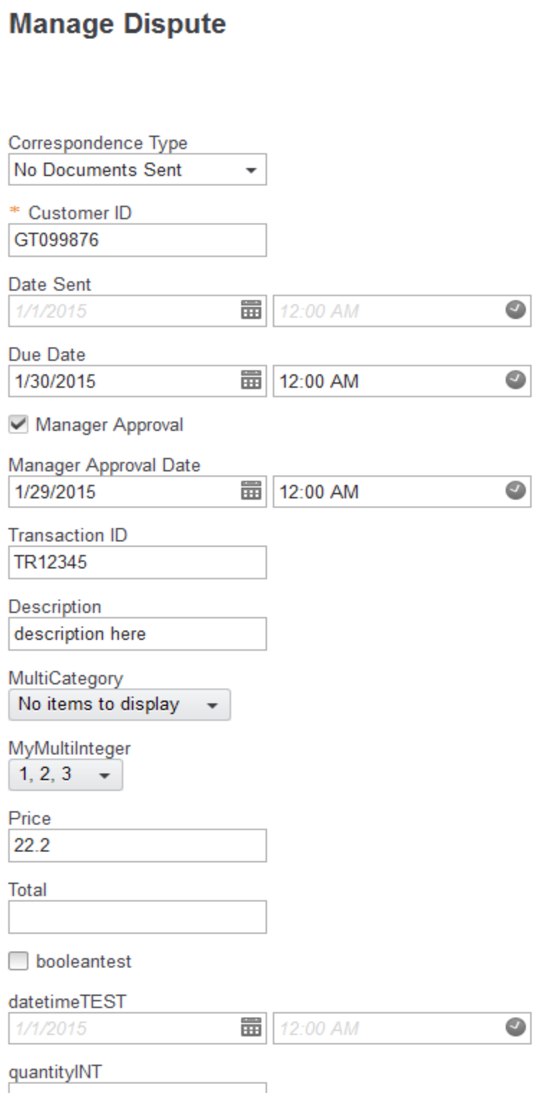
Step	Action

	value: 1
	}
	]
	}
	}
	};
	var collectionController = ControllerManager.bind(editable);
	collectionController.bind("External", "External", model);
	complete();
	});
	// Participate in the AFTERLOADWIDGET topic to release the controller binding.
	payload.coordination.participate(Constants.CoordTopic.AFTERLOAD WIDGET,
	function(context, complete, abort) {
	ControllerManager.unbind(editable);
	complete();
	});
	});

5	Click OK. Save and Close the Page Designer.
6	In the Add Case Pages box, click on Add Case and open the Page designer. In the Page Designer, click on the show hidden widget button on the top of the page.
7	Click the Edit Settings icon on the Script Adapter widget, remove the existing text from the Javascript window, and paste the JavaScript from Step 4 into the window.
8	Click OK. Save and Close the Page Designer.
9	Navigate to the **Case Types** tab and then click on **Manage Dispute**.
10	On the Properties Layout tab of Views, change the default view to System-generated.
11	Click the Save and Close button. On the Case Manager Builder page, click Deploy and confirm your changes. Wait for the green check mark icon to appear on the Credit Card Disputes HOL solution.
12	Click on the Test icon after the solution is done deploying. Click on the Add Case button, and select Manage Disputes.
13	Fill in the properties. Notice that the external properties defined in the properties section of the java script are displayed.

© Copyright IBM Corp. 2013

Step	Action



14	Click Add. Navigate to the **Case Details** page by doing a wild card search in the Search widget and clicking on the case you just created.
15	Again, the the external properties defined in the properties section of the java script are displayed.
16	Click Close, then close the Case Cient. Log out of the Case Builder.

© Copyright IBM Corp. 2013

Summary

In this section:

- Used a collection of External Properties in the system-generated view of the Properties Widget.

© Copyright IBM Corp. 2013

Additional eLearning Resources

- 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

- Using External Properties devWorks article:

https://www.ibm.com/developerworks/community/blogs/e8206aad-10e2-4c49-b00c-fee572815374/resource/ACM_LP/ExternalPropertiesICM.pdf?lang=en

- Selected sessions from IBM Case Manager V5.2 Product Implementation and Maintenance Training (PIT / PMT) (220246):

  02-ICM 5.2 Case Client User Interface Improvements PIT PMT (36 minutes)

  04-ICM 5.2 Using Page Designer to Customize Case Client Layout PIT PMT (24 minutes)

  05-ICM 5.2 Case Builder UI Improvements PIT PMT (20 minutes)

  28-ICM 5.2 Properties View Designer PIT PMT (1 hour 23 minutes)

© Copyright IBM Corp. 2013