



IBM Case Manager: Case Builder and Case Client Labs

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Before You Begin

Overview

The information in this section provides preparatory information for this workshop.

Abstract

Through presentation and hands-on exercise, this session will demonstrate how to use the IBM Case Manager tooling and the broader FileNet P8 platform toolset to extend and customize a solution into a complete solution.

Introduction

In order to benefit from these exercises you should have listened to the associated presentation for any last minute details. No additional technical knowledge is expected or required.

Conventions

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

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.
<i>italics</i>	In addition to book titles, italics are used to emphasize certain words, especially new terms when they are first introduced.

1.0 Introduction

IBM Case Manager introduces exciting new capabilities that allow organizations to more quickly design, assemble, and deploy case management solutions.

Built on top of the IBM Case Foundation platform, the IBM Case Manager adds many new out of the box capabilities that previously would have required custom development that leveraged the FileNet P8 Content Platform Engine platform.

1.1 What is Case Management?

Case Management refers to the coordination of services such as health, legal, or financial on behalf of a party. This typically includes creating a case file and following a process to ensure delivery of services. Case related information is used by case managers or a case team who collaborate to resolve and close a case.

After a case is closed, information is typically retained for compliance or long-term business processes.

Case management is highly **collaborative, dynamic, and event-driven work**, with typically long-lived cases and processes.

IBM's Advanced Case Management vision pulls together many capabilities and concepts and integrates them in new and powerful ways with the goal of providing a 360° view onto case work.

1.2 Key Capabilities of IBM Case Manager

With this release of IBM Case Manager, several key areas have been addressed.

Case-Specific Object Model allows the base P8 platform to recognize cases, case properties and case specific actions and tasks.

IBM Case Manager Builder is a Business Analyst focused tool for designing and deploying case management solutions. It provides an easy way to define an entire solution made up of one or more case types and their associated properties, documents, and tasks.

IBM Case Manager Client is the end user runtime environment that is used by case workers. This web based application is built on the widgets and the IBM Content Navigator framework. This environment allows solution developers to quickly assemble user interfaces using drag and drop components that can come from IBM, 3rd party partners, or from your internal development using Dojo.

Automated configuration and deployment tools simplify the steps needed to install and deploy your solutions. Testing your solution in your development sandbox requires only a single click!

1.3 Solution Templates

To accelerate the development of case management solutions, IBM Case Manager supports the concept of a solution template. A solution template is a collection of assets that can be used as a starting point and extended and customized to build a more complete solution. Templates can be vertical, focused on a particular problem within a particular industry, or more horizontal in nature, addressing a problem that is common across multiple industries.

Sample solution templates are being provided with IBM Case Manager. For this workshop we will extend existing solutions, but the steps are virtually identical to starting from a template.

1.4 Key Components of IBM Case Foundation

Content Platform Engine

Provides a secure repository for all types of documents including process maps. Provides the services to execute the process maps.

Case Analyzer (formerly Process Analyzer)

Allows you to see metrics about a case or process that has already been run

Process Simulator

Allows you to create “what if” scenarios around process loads and resources in order to get optimal performance out of your business processes

Process Designer

Web-based tool hosted by Workplace XT that allows you to diagram, document, and configure process maps.

Content Navigator

The web interface for both content access and configuration

1.5 Using IBM Case Manager and the FileNet P8 platform together

There are a number of situations where your Case Management solutions will require that you step outside of the IBM Case Manager Builder and work with the other tools in the FileNet P8 toolset. Examples include:

- **Automated or non-human steps in process flows**

IBM Case Manager Builder is targeted at enabling the Business Analyst to model the human-centric processes that deliver your case management solutions. Often those human-centric processes need to be supplemented with automation, or system steps. Implementing these steps involves stepping outside of the Case Manager Builder and working in Process Designer. The integration between Case Manager Builder and Process Designer makes it easy to move between the two tools.

- **Development and Integration of eForms and IBM Forms**

Many solutions take advantage of form technology to provide seamless, intuitive user interface that enable users to quickly enter case details. With IBM Case Manager, you continue to develop these forms using FileNet eForms Designer and integrate them using Process Designer. Starting in ICM 5.1, this support is extended to IBM Forms (formerly called Lotus Forms).

- **Integration of Rules Systems**

Rules systems are a critical component of case management solutions. In addition to the new integrated rules, provided in IBM Case Manager Builder, IBM Case Manager provides a level of integration with IBM Operational Decision Manager. Users can create rules and integrate them with process flows to provide rules system support.

- **Development of Custom Interfaces**

Providing a customized user interface that supports each user is also a critical component of a case management solution. IBM Case Manager provides integration with IBM Content Navigator. Users can develop custom pages as well as individual custom widgets. These custom user interfaces will be deployed with the solution.

IBM Case Manager provides integration with the FileNet P8 tooling to enable users to move easily between these tools.

2.0 IBM Case Manager Lab Overview

2.1 Lab Objective

- To familiarize participants with solutions (and solution templates) and how to take advantage of them in IBM Case Manager.
- To give participants an understanding of how IBM Case Manager can be used together with the FileNet P8 tooling to build a complete case management solution.

2.2 Lab Description

In this lab, you will have the opportunity to work with a sample solution that is provided for IBM Case Manager. After reviewing the solution, you will work through a series of exercises to extend and customize it to create a more complete solution. You will work in IBM Case Manager Builder as well as the FileNet P8 tools, such as Process Designer. You will also see how to deploy a solution.

2.3 Lab Scenario – Credit Card Dispute Management

You are the business analyst for ABC Bank. You are responsible for the bank's solution to manage credit card disputes within the bank. A dispute is initiated when a customer calls in. A customer service representative takes the call, gathers some information and then passes it on to a dispute advisor who will process the case. Any correspondence that is sent to the customer is processed by a correspondence team.

You are asked to enhance the solution, providing a series of extensions.

2.3.1 Overview of the Credit Card Dispute Management Solution

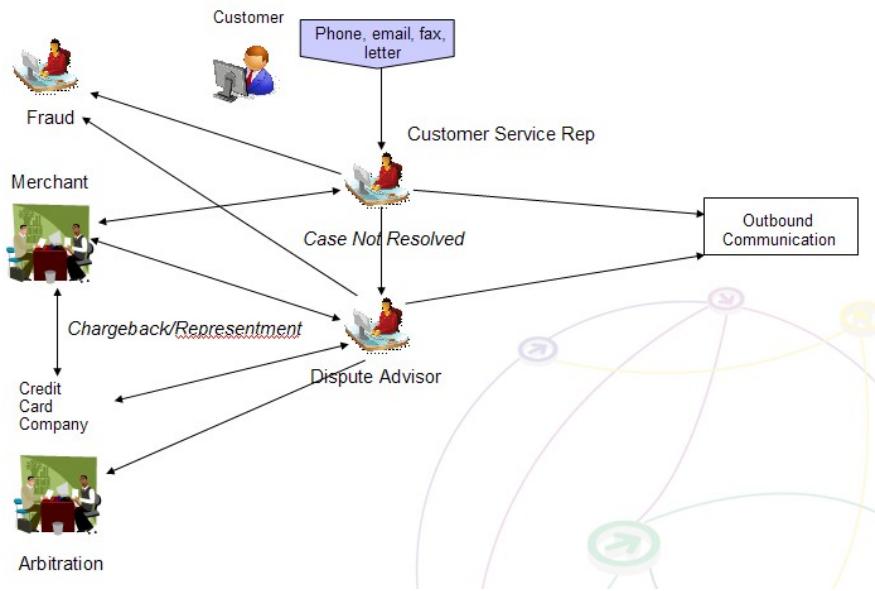
Successfully managing customer credit disputes is a critical service for card issuing financial institutions. It requires efficient interactions between customers, merchants, the bank and credit card agencies.

The urgency for banks to find an efficient solution to this problem is heightened by the fact that credit card disputes are on the rise due to today's difficult economic times. Also, the introduction of the Fair Credit Billing Act has put increased pressure on creditors to correctly and efficiently process disputes.

Most card issuing institutions have well defined processes for working with merchants to resolve disputes. These processes can be content intensive and involve many manual steps. Errors or inefficiencies in the interactions between the bank and the other participants in the process can result in additional costs, delays and unresolved disputes.

The following diagram shows a typical flow for a credit card dispute:

High Level Process Map – Dispute Case Items



Most often, a customer will call in with a dispute. A customer service representative receives the call and gathers details about the case. The case is then passed on to a dispute advisor who will own the case through to completion. The dispute advisor works with the merchant, customer and credit card company to attempt to resolve the case. At any point, the case may be transferred to the fraud department for investigation if fraud is suspected.

Throughout the process, there are SLA requirements for resolution of the case and requirements around communications to the customer. Rules systems may be involved in multiple places in the process, from guiding the customer service rep in gathering information about the case, to routing the case, to determining fraud.

2.3.2 Roles

In addition to the customer service representative and dispute advisor mentioned above, there are a number of other roles involved in the process. A fraud investigator may get involved if fraud is suspected. A supervisor may be asked to review the case if certain thresholds are exceeded. There are teams that manage inbound documentation and generate outgoing correspondence.

2.3.3 Document Types

There are a number of documents that may get stored with a dispute case. A dispute form often will initiate the case. Customers may submit different documents in support of their case, including receipts, emails, complaint letters, invoices, and delivery agreements. All correspondence that goes to the customer is stored with the case.

Beyond this, any recordings of phone interactions would be stored, as well as any documents that are exchanged between the bank and the credit card agencies.

2.3.4 Case Types

A typical credit card dispute solution would have three case types:

Customer Case: the higher level umbrella case that is visible to the customer. Captures all the requests or disputed items the customer opened on a particular call.

Dispute Item: the process for managing the resolution of an individual disputed item. A customer case would have one or more disputed item case instances.

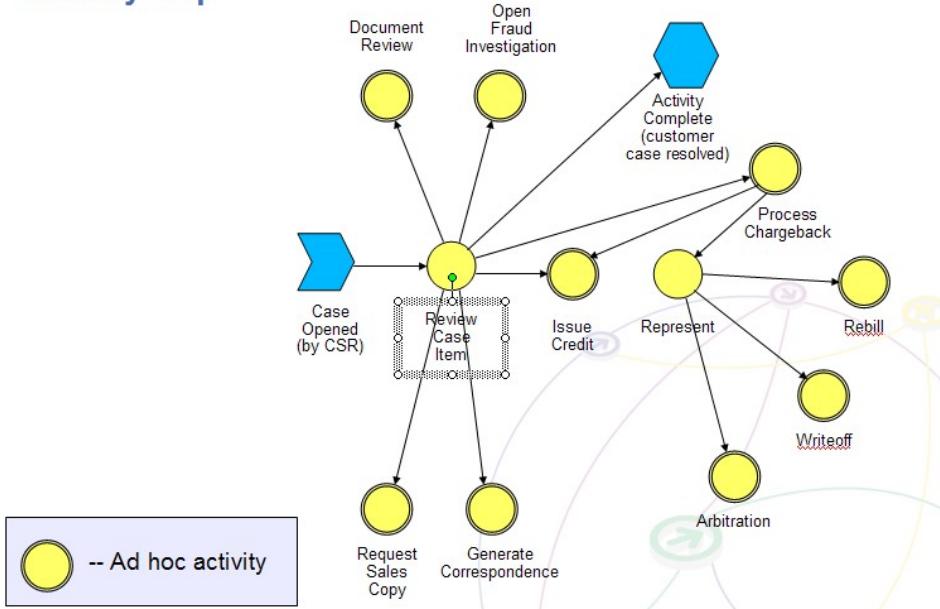
Fraud Investigation: opened if it is suspected that a disputed item case involves fraud.

The solution you will be working with today only models the Dispute Item case type.

2.3.5 Task Map for Managing a Dispute Item

As mentioned earlier, the process of managing a dispute item involves a number of manual, ad hoc processes. Once the case is assigned to a dispute advisor, that person will determine what steps are taken to resolve the case. Consequently, the task map for managing a dispute item is fairly simple:

Activity Map



Much of the work is done within the Review Case Item task. The dispute advisor may choose to invoke any number of ad hoc tasks. When a chargeback is processed, a number of tasks could be initiated depending on the response from the merchant to that request. The process concludes with either a credit being issued, the customer being re-billed, or the bank taking a write-off.

3.0 Lab Details

3.1 Lab Prerequisites / Notes

- The IBM Case Manager tools work best on a higher resolution setting. Set your monitor resolution to at least 1280x1024.
- When working with the IBM Case Manager Builder, maximize your browser to ensure that all controls are laid out correctly and are accessible. F11 can be used.
- Avoid hitting the back arrow on the browser when working with the IBM Case Manager Builder tool.

3.2 Lab Configuration / Notes

3.2.1 Accessing Tools

To access the tools on your system, you need the following URLs:

(There are links on the desktop, you can also use the html file provided in the stick folder).

IBM Case Manager Builder:

- <http://localhost:9080/CaseBuilder/login/login.jsp>

IBM Case Manager Client

- <http://localhost:9080/navigator/?desktop=icm>

IBM FileNet WorkplaceXT

- <http://localhost:9080/WorkplaceXT>

There may be desktop shortcuts or browser bookmarks toolbar links for these tools. If so, click on them instead of remembering and typing the URL.

3.2.2 Users on the system

The system is configured with the primary user “P8Admin”. That user and all others have the password “filenet”. More users can be added if needed for your solutions.

3.2.3 Solution Names

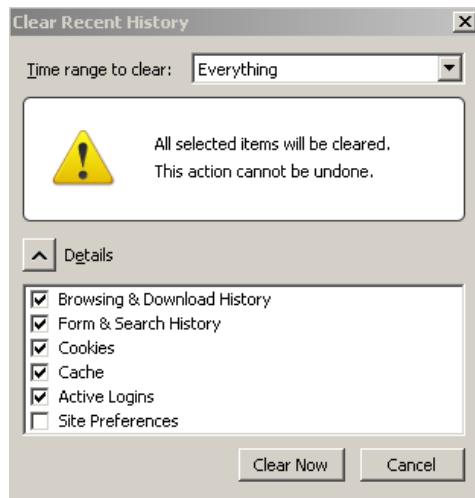
In this workshop image there may be multiple solutions with similar names, such as variations on “Credit Card Dispute”. Be careful to use the correct solution (as indicated) for each lab exercise.

3.2.4 Firefox Caching Issues

You may see some strange behavior when switching between Case Manager applications. For example, if you have been using Case Builder, log out, and then try to start Case Client, it may go back into Case Builder instead. To fix this, close Firefox before starting a new application. Turning off Firefox caching (as below) should also work.

Browser caching may also cause problems with various functions in Case Manager. If you suspect cached information may be an issue, follow these instructions:

1. At the top of the Firefox window, click on the Tools menu.
2. Select **Clear Recent History**.
3. Choose the time range and items to clear as in the following screen.
4. Click on **Clear Now**.
5. Exit Firefox.



4.0 Step-by-Step – Working with the Credit Card Disputes HOL Solution

In this section, you will use the Case Manager Builder to inspect a credit card dispute management solution. You will add some simple customizations to the solution. You will deploy the solution and interact with its runtime components to see your changes. In the following sections you will add and configure assets to build out the solution.

Step	Action
1	<p>Start by opening the IBM Case Manager Builder tool.</p> <ul style="list-style-type: none"> On the Windows image, open the Firefox browser, using the desktop icon Start the IBM Case Builder using the toolbar link or the URL given earlier.
2	<p>Login to the IBM Case Manager Builder as the business analyst</p> <p>Enter P8Admin for the user id, and filenet for the password</p>
3	You will see the Manage Solutions page.

Solution Name	Description	Last Modified
Healthcare Payer Claims Processing	Solution Prefix: HPCP	12/16/2013, 2:59 PM
Healthcare Fraud Prevention	Solution Prefix: HFP	12/16/2013, 2:54 PM
EmployeeLogistics	Employee Travel and Logistics Solution Prefix: ELC	12/16/2013, 2:43 PM
Credit Card Disputes HOL	Solution for managing disputed credit card transactions Solution Prefix: CCD2	12/16/2013, 2:35 PM
Credit Card Disputes	Solution for managing disputed credit card transactions Solution Prefix: CCD1	12/16/2013, 2:34 PM
Government Assistance	Solution Prefix: GA	12/16/2013, 2:50 PM
Auto Warranty Management	Warranty Management System for Automotive manufacturer Solution Prefix: AWM	12/16/2013, 2:31 PM

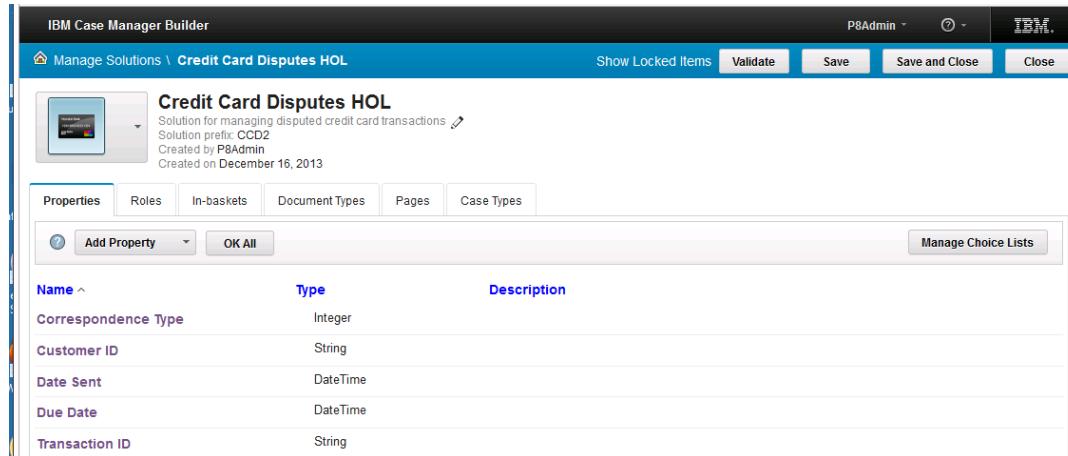
From this page, you can see other solutions that have already been created on this server.

4.1 -- Solution Properties

Step Action

- 1** Open the **Credit Card Disputes HOL** solution by clicking on the name of the solution.

When you open the solution, you should see the following screen:



The screenshot shows the 'IBM Case Manager Builder' application window. The title bar says 'IBM Case Manager Builder'. The top menu bar includes 'Manage Solutions \ Credit Card Disputes HOL', 'Show Locked Items', 'Validate', 'Save', 'Save and Close', and 'Close'. The main content area displays the 'Credit Card Disputes HOL' solution details: 'Solution for managing disputed credit card transactions', 'Solution prefix: CCD2', 'Created by P8Admin', and 'Created on December 16, 2013'. Below this, there are tabs for 'Properties', 'Roles', 'In-baskets', 'Document Types', 'Pages', and 'Case Types'. The 'Properties' tab is selected. It contains a table with columns 'Name', 'Type', and 'Description'. The properties listed are: Correspondence Type (Integer), Customer ID (String), Date Sent (DateTime), Due Date (DateTime), and Transaction ID (String). At the bottom of the properties table are buttons for 'Add Property', 'OK All', and 'Manage Choice Lists'.

From here, you can inspect the properties, roles, document types and case types in your solution. You will start by inspecting the properties.

- 2**



The Business Analyst can add properties to the solution. Each property has a type. Possible types include

Boolean

String

Integer

Float

DateTime.

In addition, the following can be specified for each property:

Single value or multiple value

Default Value

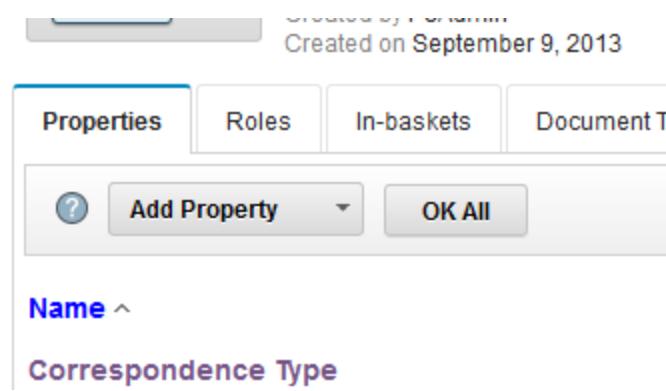
Maximum and minimum values (float and integer only)

Maximum length (string only)

Choice lists (integer and strings only)

-
- 3 Clicking on the Properties tab will reveal five properties: **Correspondence Type**, **Customer ID**, **Date Sent**, **Due Date**, and **Transaction ID**.

In the **Manage Solutions \ Credit Card Disputes HOL** screen:

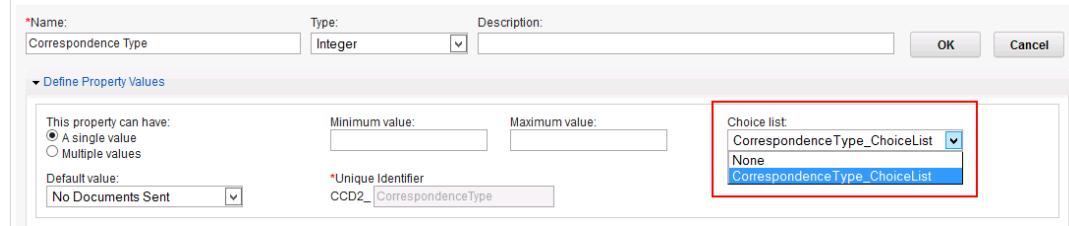


Click the **Properties** tab

- 4 Click **Correspondence Type**
-

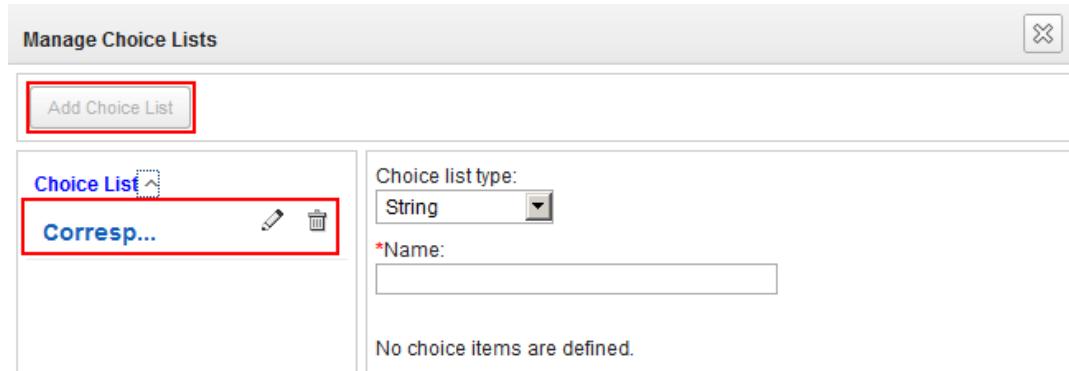
5 Inspect the definition of the **Correspondence Type property.**

Expand the **Define Property Values** section under the **Correspondence Type** property

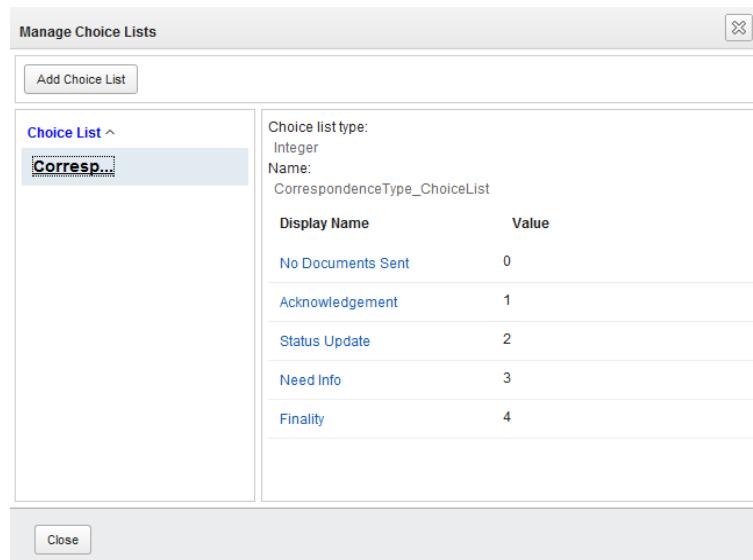


Notice that Under “**Choice list**” there is a pulldown menu indicating that Correspondence Type has the Choice List **CorrespondenceType.ChoiceList** assigned to it.

To view the definition of that Choice List, click on **Manage Choice Lists**, then click on the link **CorrespondenceType.ChoiceList**. (To edit or delete the Choice List, click on the appropriate link (pencil or trash can icon) beside it. To add a new Choice List, click the **Add Choice List** link).



-
- 6 See the choice values defined, then click the **Close** button.



Back on the Properties tab, click **Cancel** (to the right of the Correspondence Type description field) to close the dialog for that property.

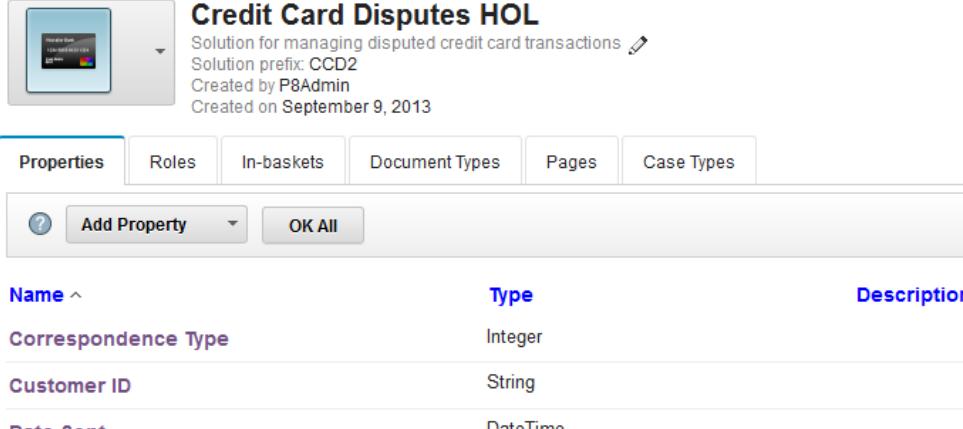
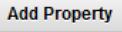
4.2 -- Roles

You will now inspect the roles that are defined for the credit card dispute management solution. There are three roles defined:

- A **Customer Service Representative**, who is responsible for initiating the dispute.
- A **Dispute Advisor** who will review the dispute and drive it to resolution.
- A **Correspondence Team** who is responsible for generating, reviewing and sending any customer correspondence.

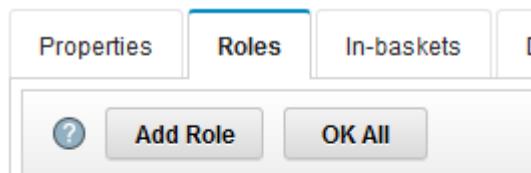
In-baskets are configured for each of them. Later, you will map users to these roles. Once a user logs on to the system he/she will get all privileges assigned to the particular role.

Perform the following steps to inspect the roles.

Step	Action												
1	 <p>Credit Card Disputes HOL Solution for managing disputed credit card transactions  Solution prefix: CCD2 Created by P8Admin Created on September 9, 2013</p> <p>Properties Roles In-baskets Document Types Pages Case Types</p> <p>  </p> <table border="1"> <thead> <tr> <th>Name ^</th> <th>Type</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Correspondence Type</td> <td>Integer</td> <td></td> </tr> <tr> <td>Customer ID</td> <td>String</td> <td></td> </tr> <tr> <td>Date</td> <td>DateTime</td> <td></td> </tr> </tbody> </table>	Name ^	Type	Description	Correspondence Type	Integer		Customer ID	String		Date	DateTime	
Name ^	Type	Description											
Correspondence Type	Integer												
Customer ID	String												
Date	DateTime												

Click on the **Roles** tab in the Case Manager Builder.

-
- 2** You should see the following roles:



Correspondence Team

Customer Service Rep

Dispute Advisor

-
- 3** Inspect one of the roles. Click on the **Customer Service Rep** link

-
- 4** You can see the definition of the Customer Service Rep's role

-
- 5** The Customer Service Rep's role has CSR Work and My Work in-baskets associated with it. There are options on showing the personal in-basket as well work assignment options

* Role:	Description:
Customer Service Rep	
<input checked="" type="button"/> Role Settings <input type="button"/> Pages	
In-baskets currently associated with this role: CSR Work, My Work	
Select the type of personal in-basket to display for this role:	
<input checked="" type="radio"/> Personal (Common): Show the common view <input type="radio"/> Personal (Role): Show a custom view for this role <input type="radio"/> Do not show common or role personal in-baskets	
Work assignment options to display for this role:	
<input checked="" type="checkbox"/> Role members can move work into their personal in-basket <input checked="" type="checkbox"/> Role members can reassign work to others	

-
- 6** You will now inspect the In-baskets tab. In-baskets are different views into a Queue (a Role corresponds to a Queue in the workflow system).

Click on the CSR Work in-basket to view the definitions of this in-basket

-
- 7 The Customer Service Rep's in-basket can be filtered to give them a more specific view. Click **In-basket Filters** to see the filters defined for this in-basket.

In-basket Name ^		
In-basket Name	In-basket Type	Associated Roles
All Assigned Work	Assignment	
CSR Work	Role	Customer Service Rep
CT Work	Role	Correspondence Team
DA Work	Role	Dispute Advisor
My Work	Personal (Common)	Correspondence Team, Customer ...

In this solution, the Customer Service Rep's in-basket can be filtered by Customer ID.

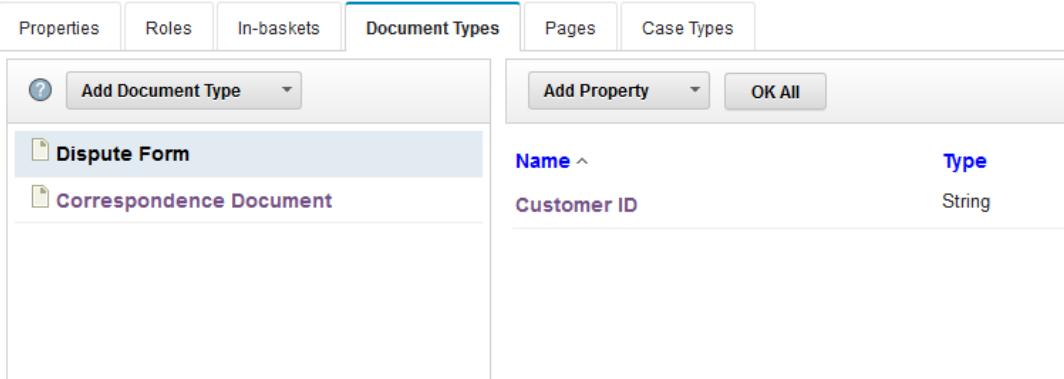
Click **Cancel** (to the right of the Customer Service Rep description field) to close the dialog for that role.

You will now inspect the document types defined by the solution.

4.3 -- Document Types

A solution can have any number of document types, depending on the different documents that are part of the case and how they are used. This Credit Card Disputes HOL solution defines two documents: a dispute form that can be used to submit a dispute, and a correspondence document to categorize letters sent to the customer.

Perform the following steps to inspect the document types for the solution.

Step	Action				
1	 <p>The screenshot shows the 'Document Types' tab selected in the top navigation bar. Below it, there's a list of document types: 'Dispute Form' and 'Correspondence Document'. To the right, a properties table is shown with one entry: 'Customer ID' of type 'String'.</p> <table border="1"><thead><tr><th>Name</th><th>Type</th></tr></thead><tbody><tr><td>Customer ID</td><td>String</td></tr></tbody></table>	Name	Type	Customer ID	String
Name	Type				
Customer ID	String				

Click the **Document Types** tab of the Case Manager Builder solution view

-
- 2 Now let's look more closely at a document type. Click on **Correspondence Document**. You can see the properties defined for that document.
-

Now you will look at the personal in-basket defined in this solution.

4.4 -- The Personal In-basket

When work items are routed directly to an individual or to a workgroup (as opposed to a role), they appear in the user's personal in-basket. This is most common with review tasks or escalations. Within a particular IBM Case Manager solution, everyone shares the same personal in-basket configuration. In this brief exercise, you will view the personal in-basket configuration for the solution.

Step	Action
------	--------

- 1 Click the **In-basket** tab and within this tab, choose the My Work inbasket. You will notice the Inbasket type as Personal (Common) and it is associated with all three roles defined in the solution

You'll see the screen below:

Name	Sortable	Sort Default	Sort Order
Due Date	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	Ascending
Customer ID	<input checked="" type="checkbox"/>	<input type="radio"/>	
Transaction ID	<input checked="" type="checkbox"/>	<input type="radio"/>	

-
- 2 Notice that the in-basket can have filters, just like the role in-baskets.
-

4.4.1 -- Pages

The Pages tab shows all the pages used in the solution. By default the system generates a set of pages; however, the solution designer can define new pages and register these pages in the solution. In the later labs we will see how custom pages are registered in the solution. Click on Solution Pages and Cases Page to view the page designer.

Step	Action
------	--------

- 1 Click the Pages tab and expand the Solution Pages to view the Work page and Cases page. When the solution is deployed, these pages (along with other pages defined in the Pages tab) will be created in the Case Client.

You'll see the screen below:

- 2 Click on the Cases page link to view the Page Designer and layout of the Cases Page

4.5 -- Solution Case Types

A solution will have one or more case types. A case type corresponds to a particular type of case that gets created within the solution. As mentioned earlier, a typical credit card dispute management solution will have three case types. The solution you are working with defines one of those types – the **Manage Dispute** case type. This case type will be created to process any disputes that get raised.

A case type contains the following elements:

- Any properties that are relevant to that case.
- The summary and detail views that users will see for a case instance.
- The folder structure for each case instance.
- The tasks that process the case.

You will open the **Manage Dispute** case type and inspect the details, including its properties, views and folders. Then you'll look at the tasks defined for the solution.

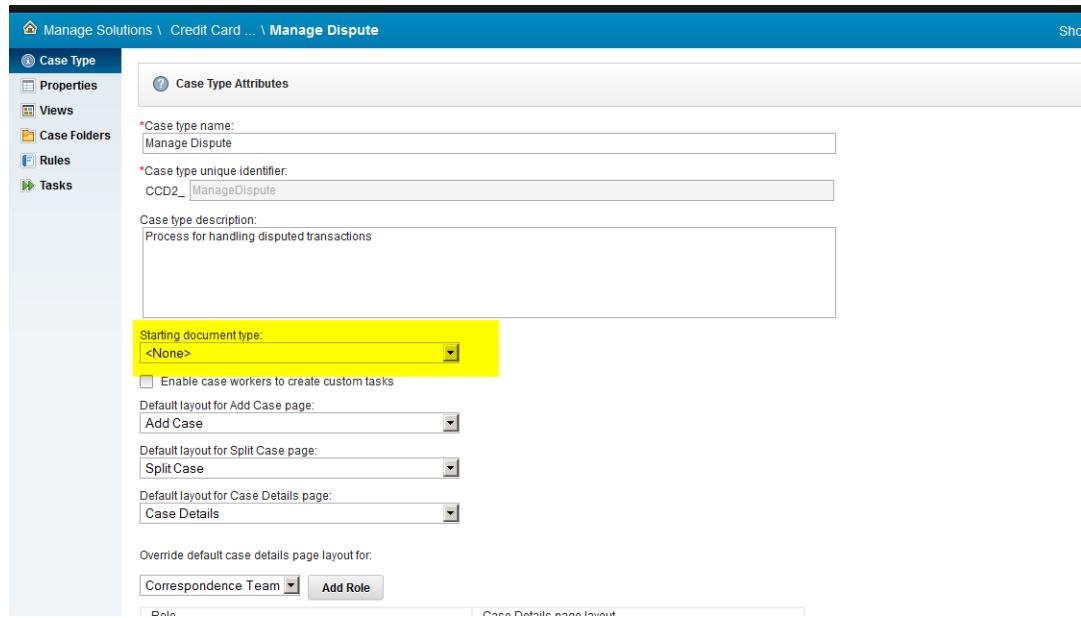
4.5.1 The Manage Dispute Case Type

Step	Action
1	From the Manage Solutions page for the Credit Card Disputes HOL solution, click the Case Types tab.

The screenshot shows the 'Case Types' tab selected in a navigation bar. Below the bar is a toolbar with a question mark icon and a 'Add Case Type' button. A main content area displays a process named 'Manage Dispute' which is described as a 'Process for handling disputed transactions'.

-
- 2 Click the **Manage Dispute** link
-

-
- 3 You will be taken to the Case Type dialog of Case Manager Builder.



The screenshot shows the 'Case Type' configuration screen in the IBM Case Manager Builder interface. The left sidebar lists options like Properties, Views, Case Folders, Rules, and Tasks. The main panel is titled 'Case Type Attributes' and contains the following fields:

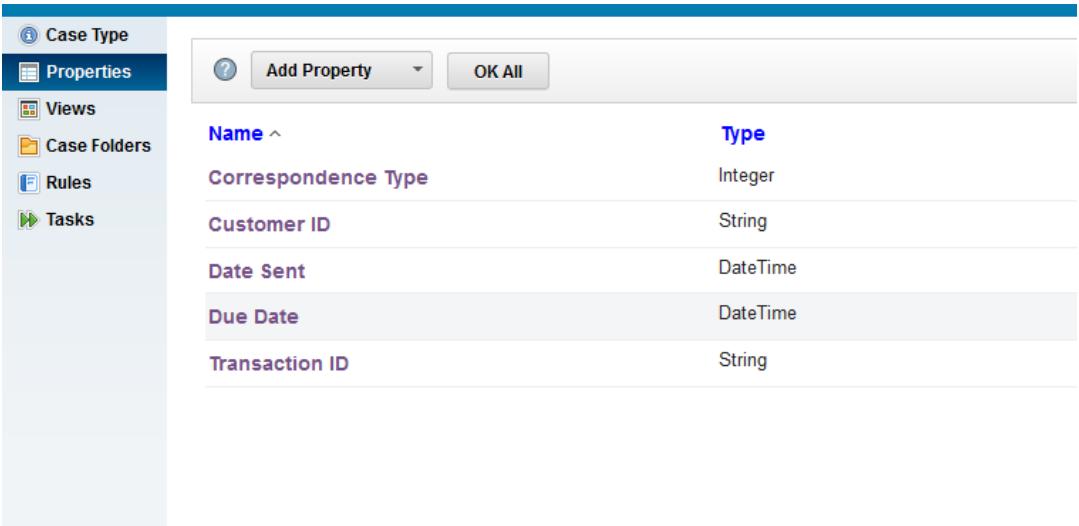
- *Case type name: Manage Dispute
- *Case type unique identifier: CCD2_
- Case type description: Process for handling disputed transactions
- Starting document type: <None> (highlighted in yellow)
- Enable case workers to create custom tasks:
- Default layout for Add Case page: Add Case
- Default layout for Split Case page: Split Case
- Default layout for Case Details page: Case Details
- Override default case details page layout for: Correspondence Team (selected) | Add Role

Notice that the **Starting document type** is **<None>**.

This means that a case worker will manually create new instances of this case type from within the runtime application as opposed to having the case created automatically on the arrival of a particular document type into the content repository. When customizing this solution, you might instead specify that a case is created whenever a dispute form is submitted.

4.5.2 Case Type Properties

Step	Action
1	Click Properties on the left side of the screen



The screenshot shows the 'Properties' dialog box for a case type. On the left, there's a sidebar with icons for Case Type, Properties (which is selected and highlighted in blue), Views, Case Folders, Rules, and Tasks. The main area has a header with a question mark icon, 'Add Property' with a dropdown arrow, and 'OK All'. Below is a table with columns 'Name ^' and 'Type'. The properties listed are: Correspondence Type (Integer), Customer ID (String), Date Sent (DateTime), Due Date (DateTime), and Transaction ID (String).

-
- 2 Click the Customer ID property to view its details.

Each of these properties was pulled from the list of properties defined at the solution level. When added to a case type, the analyst can specify whether this property is visible to the user, whether it is required for the case type when it is instantiated, and its default value.

4.5.3 Case Views

The Case Manager Client user interface provides a set of widgets that enable case workers to get or update information about case instances. Three of these widgets are:

- **Case Information** widget (**Case Summary** panel). Provides a summary-level view of key properties of the case.
- **Properties** widget. Provides a more detailed view of the properties of the case. Within this view, properties can be grouped and hidden to help manage the presentation when there are many properties. The properties can also be edited in this widget when appropriate. The Case Builder allows the business analyst to define views of the Case Data using the Properties Layout. This allows the solution designer to rapidly design highly configurable user interface at design

time. The deploy operation will instantiate the view and assign it to the Case Details Pages.

- **Case Search** widget. The case worker can use this widget to search for cases based on criteria provided by the business analyst.

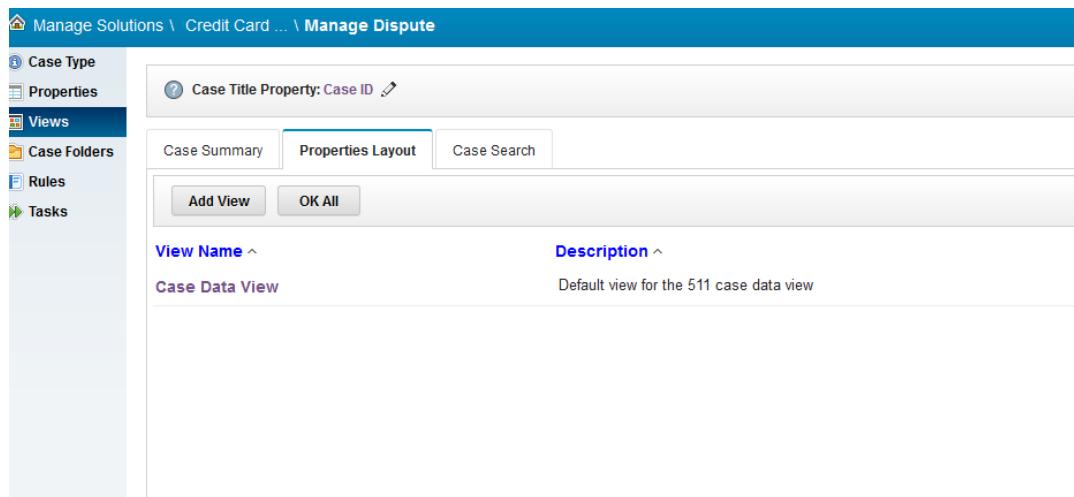
Within the Case Manager Builder, the Business Analyst can configure which properties are displayed in these widgets. In this exercise, you will use Case Manager Builder to see how the author of this solution configured those widgets for your Credit Card Disputes HOL solution.

Step	Action
1	Select Views on the left hand side of the screen
2	Make sure the Case Summary tab is selected
3	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.

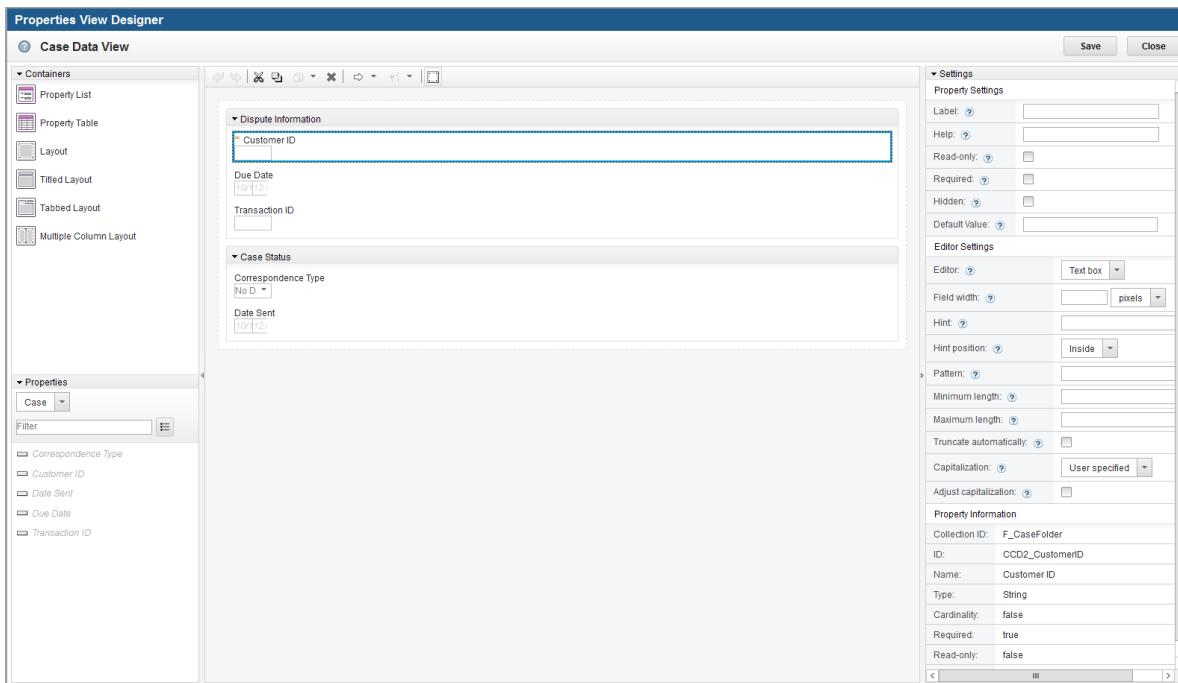
Next you will inspect the view for the **Properties Layout** widget. This widget provides more details on the case and allows you to edit property values. Notice how properties are grouped here to improve the layout of the information. A default Case Data View is provided by the system however the business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

Step Action

- 1 From the **Views** section, click the **Properties Layout** tab



Click on the Case Data View to open the Property Layout Designer. In the layout 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.



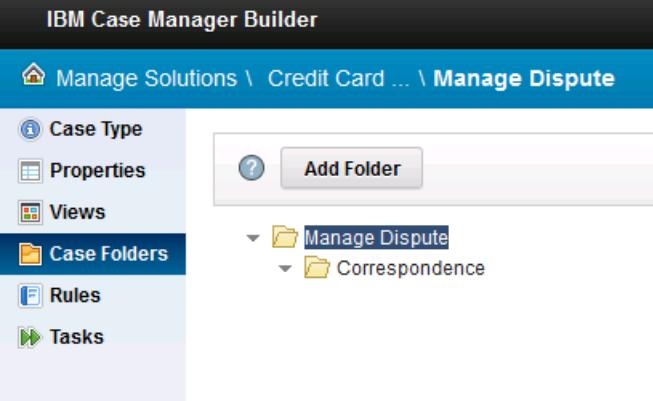
Finally in the Case Search tab, you will inspect what properties will be available when searching for this case type.

Step Action

- 1** From the **Views** section, click the **Case Search** tab
- 2** Notice that the author of the solution has specified that the user can search for case instances using **Customer ID**, **Due Date**, and **Transaction ID**.

4.5.4 The folder structure for Manage Dispute Item

Within the Case Manager Builder, the business analyst can define the structure of the case that is created within the content repository. This can be useful for creating folders that will contain particular types of documents.

Step	Action
1	Select the Case Folders section from the list on the left  The screenshot shows the IBM Case Manager Builder interface. The left sidebar has several options: Case Type, Properties, Views, Case Folders (which is highlighted in blue), Rules, and Tasks. The main panel shows a breadcrumb path: Manage Solutions \ Credit Card ... \ Manage Dispute. Below the path is an 'Add Folder' button. Under the 'Manage Dispute' folder, there is a subfolder named 'Correspondence'. <hr/>
2	Notice the Correspondence folder. T This is another area that you likely would customize, adding folders that make sense for your implementation of dispute management. For example, you might have a folder for storing any supporting documents added to the case. At runtime, the case type root folder (above, ManageDispute) is replaced by a hierarchy of folders, with each case instance having a root named with the CaseID <hr/>

4.5.4 Rules

Case Manager 5.2 introduced an embedded Rules Engine, which does not require an installation of a Rules Engine separately. The Case Builder allows the business analyst to design rules either as a text-based rule or a table based rule. We will cover Rules in more detail in a separate topic.

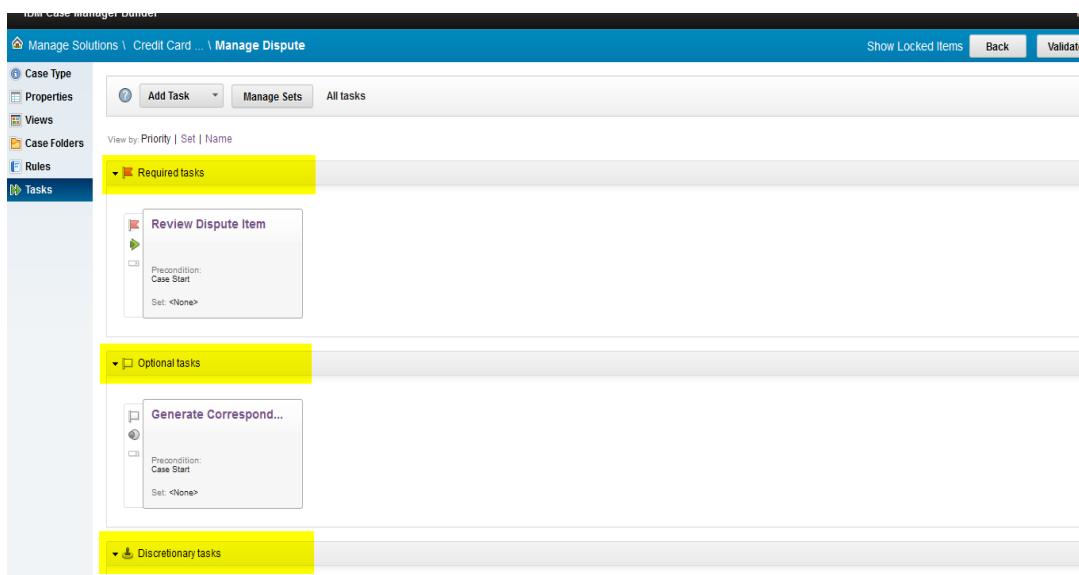
4.5.5 Tasks

Tasks are the most critical part of a case type. The tasks dictate how a case is processed. A case type will have some collection of automatic and manual tasks. A subset of these tasks will be required and must complete before the case can be closed.

This simple implementation of Credit Card Disputes HOL has three tasks.

Step Action

- 1** Select the **Tasks** section from the list on the left



-
- 2** Click **Review Dispute Item**. The information in the screen below should appear to the right of the Review Dispute Item task.
-

3

The screenshot shows the 'General' tab selected in a dialog box. The 'Name' field contains 'Review Dispute Item'. The 'Unique Identifier' field contains 'CCD2_ReviewDisputeItem'. The 'Description' field is empty. Under 'This task starts:', the radio button for 'Automatically' is selected. Under 'This task is:', the 'Required' checkbox is checked. Under 'Assign to set:', there is a dropdown menu showing '<None>' and a 'Manage Sets' button. At the bottom are 'OK' and 'Cancel' buttons.

Make sure the **General** tab is selected. Note that this task is marked as automatically started and required.

4 Select the **Preconditions** tab.

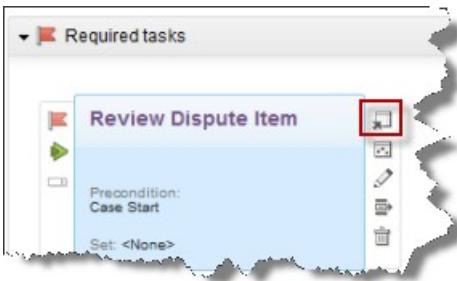
The screenshot shows the 'Preconditions' tab selected in the dialog box. A dropdown menu under 'What preconditions must be met for this task to start?' shows 'No preconditions'.

Note that a task may be initiated based on a number of different preconditions, including the adding of a new document to the case or some property condition being met.

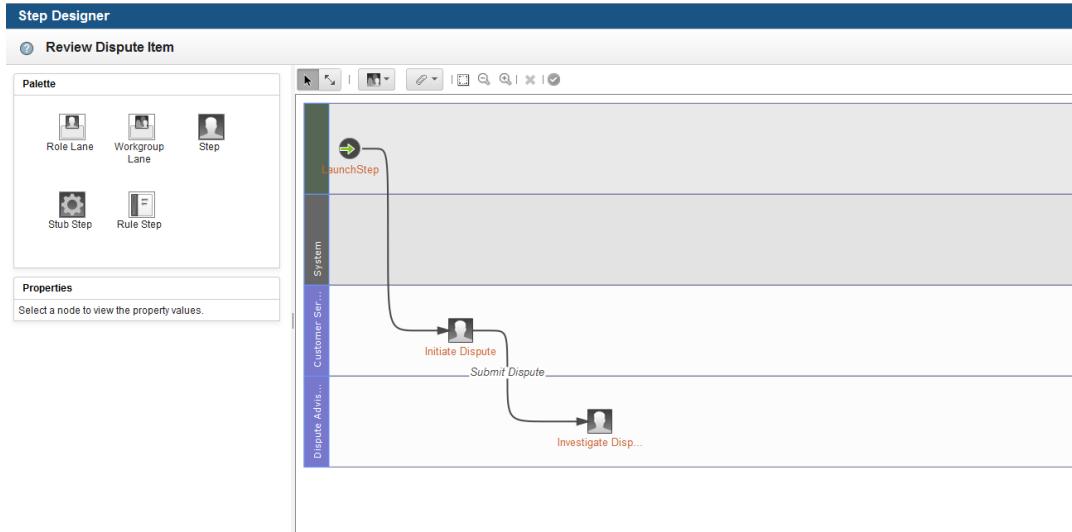
Note that for this task, **No precondition**, is selected. By doing this, you ensure that this task will be initiated whenever a new case instance is created.

5 Click **OK** to exit the properties dialog for this task

You will now inspect the process flow for this task.

Step	Action
1	 <p>Hover over the Review Dispute Item task and click on the Open Step Editor icon just below the pencil icon</p>

-
- 2 This will open the Case Manager Builder Step Editor and you will see a screen similar to this:



This simple task has two steps that are distributed across two roles: the Customer Service Rep and the Dispute Advisor.

By clicking on a step, you can see how the properties of the step are configured.

You could customize this task by adding a new role or by adding additional steps.

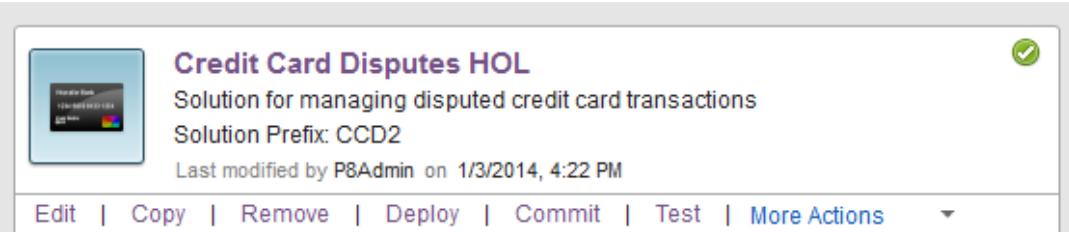
Click on **Close** to exit the Step Editor, then **Back** to exit the Manage Dispute case type, then **Close** to exit the solution. You should now be back on the Manage Solutions panel.

Later, you will inspect the Generate Correspondence task. But for now, let's try to deploy the solution.

4.6 - Deploying and Testing the Credit Card Disputes HOL Solution

To give you some familiarity with the process of deploying and running your solution, you will now deploy the solution. IBM Case Manager Builder provides a sandbox environment where business analysts can deploy and test their solutions, then make changes and redeploy.

4.6.1 Deploying a solution from within IBM Case Manager Builder

Step	Action
1	

From the **Manage Solutions** page, hover over the **Credit Cards Disputes HOL** solution to reveal the **Deploy** link

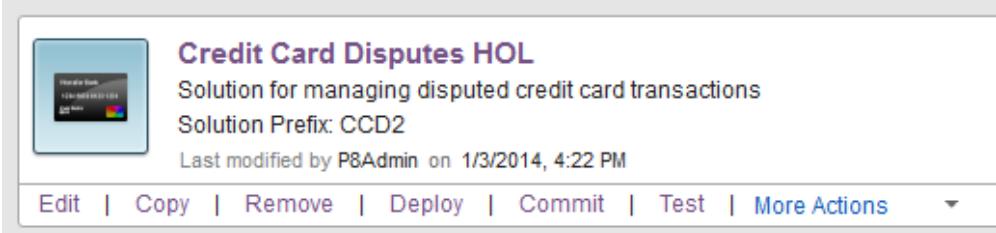
Click the **Deploy** link to deploy the solution. If a confirmation dialog comes up, accept and click Deploy. (You may need to commit changes.)

-
- 2 The status of the deploy operation will be updated with messages in the lower left of the page. Click on the right-pointing triangle to expand the message area.

When the deployment operation has completed, a checkmark in a green circle (as in the screen above), indicates successful deployment of the solution to the Case Manager Client.

4.6.2 Testing a solution with the IBM Case Manager Client

IBM Case Manager includes a widgets-based client environment deployed in IBM Content Navigator that allows the end users of your solution to work with cases.

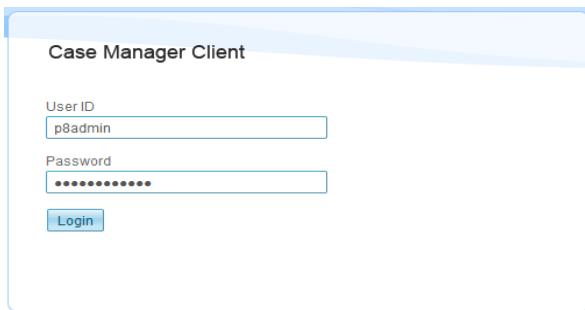
Step	Action
1	

From the **Manage Solutions** page, hover over the **Credit Cards Disputes HOL** solution to reveal the **Test** link.

Click the **Test** link to open the Case Manager Client in a new window.

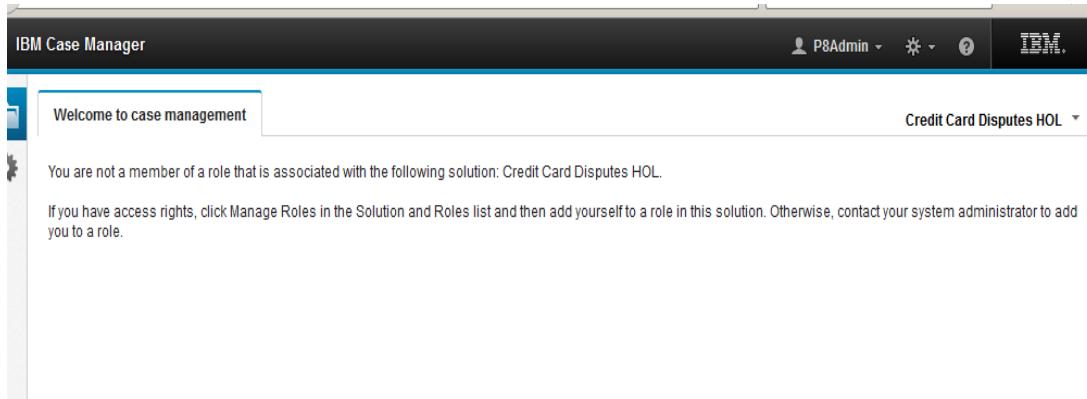
-
- 2 IBM Case Manager uses single sign-on to seamlessly transfer you to the IBM Case Manager Client web application.

Note: If you are asked to log in to the IBM Case Manager Client, do so by entering the username (p8admin) and password (filenet) provided to you.



-
- 3 The Test link you clicked from Case Manager Builder's Manage Solutions page includes the page ID of the standard pages associated with your solution, so it should take you right there.

You will now see a screen similar to this. You can maximize your window by pressing the F11 key.



-
- 4

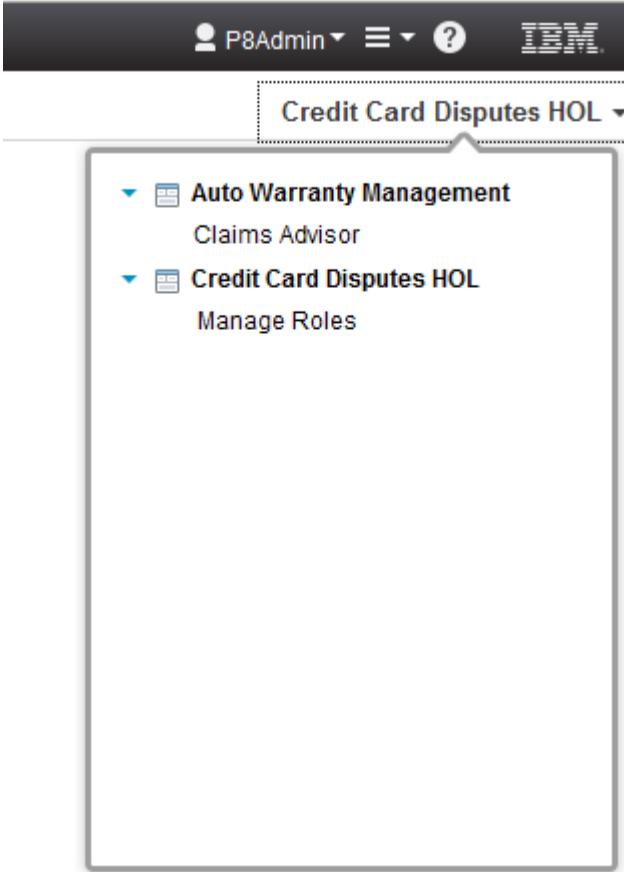


When you deployed your solution from Case Manager Builder, a set of Pages were added to the client application.

*By default, the main solution contains two pages, **Work** and **Cases**. The **Work** page contains the user's in-basket and displays tasks assigned to the user's role or to him/her personally. The **Cases** page allows the user to search for cases and from there, display the case details.*

In addition to the main solution, there are additional ones deployed in the Content Navigator application which are hidden. You viewed these in the Case Builder Pages tab.

You can customize these pages or create new ones, but we will just use the default pages assigned in the Case Manager Builder.

5

Make sure the **Credit Card Disputes HOL** solution is selected from the drop down menu on the right.

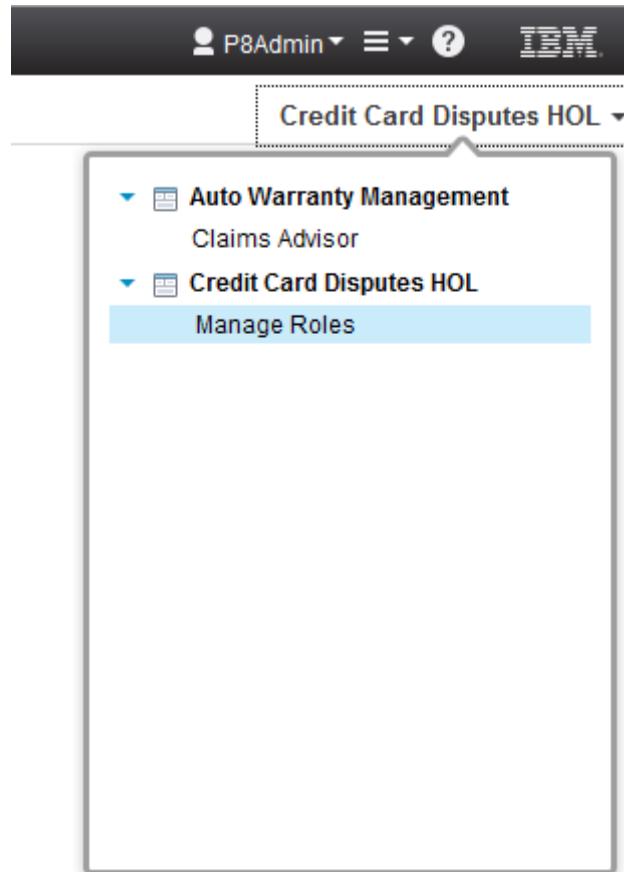
From this page you will perform the next step in deployment, assigning users to the roles you defined.

4.6.3 Assigning users to roles

The first time you deploy a solution, you will have to assign users to the roles you defined. Individual users or LDAP groups can be assigned to multiple roles. When a user logs in to IBM Case Manager Client, they will have access to the in-basket for each role of which they are a member.

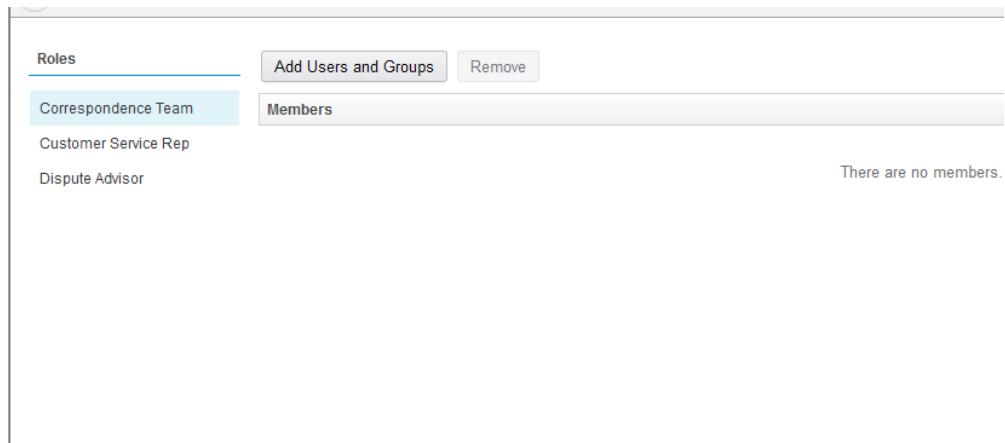
Step	Action
------	--------

-
- 1 Users can be assigned to roles from the **Manage Roles** button on the **Work** page of your **Credit Card Disputes HOL solution**.



Click the **Manage Roles** link under the Credit Card Disputes HOL solution

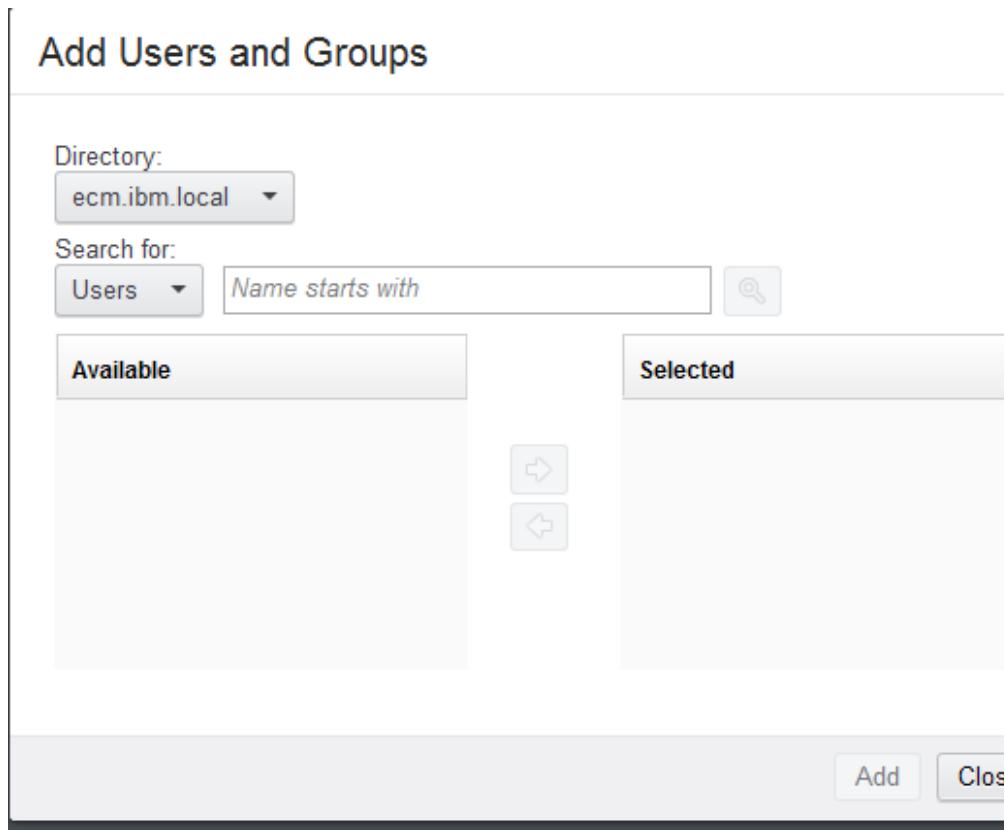
-
- 2 The Manage Roles dialog will be displayed. For this lab, we will be adding the user you are currently logged in as (P8Admin) to each role, allowing you to play each role.



Click **Correspondence Team** role in the list on the left. The current members of the role (if any) are listed.

-
- 3 Click on **Add Users and Groups**

-
- 4



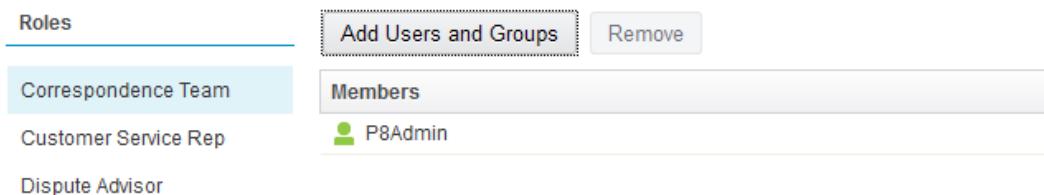
Enter **P8Admin** (or any initial substring of the name) and click **Search**

-
- 5 Select your user from the available users and groups

6 Click Add Selected

7 Click OK

Your user will be added to the role.



The screenshot shows a user interface for managing roles. At the top, there's a header with tabs: 'Roles' (which is underlined), 'Add Users and Groups' (which has a dashed border around it), and 'Remove'. Below the header, there are two sections: 'Correspondence Team' and 'Members'. Under 'Correspondence Team', there are two items: 'Customer Service Rep' and 'Dispute Advisor'. Under 'Members', there is one item: 'P8Admin' with a small user icon next to it.

8 Repeat the steps 2 - 7 to add the **P8Admin user to the other two roles**

9 Click **Save in the **Manage Roles** dialog to complete this step**

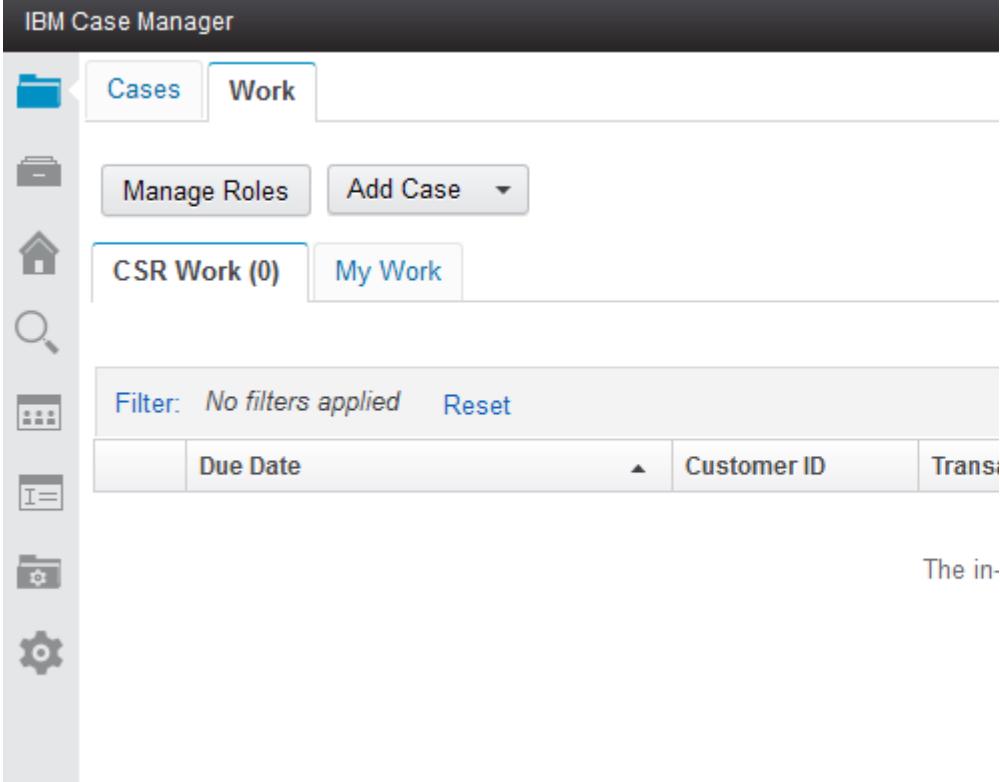
10

You should now see a drop down list of roles on the right side of the page. When you select a role, the in-basket for that role should be displayed. If the roles and in-baskets do not appear immediately, **press the F5 key** to refresh your page. Select the **Customer Service Rep** role.

You are now ready to try out your solution.

4.6.4 Trying out the solution

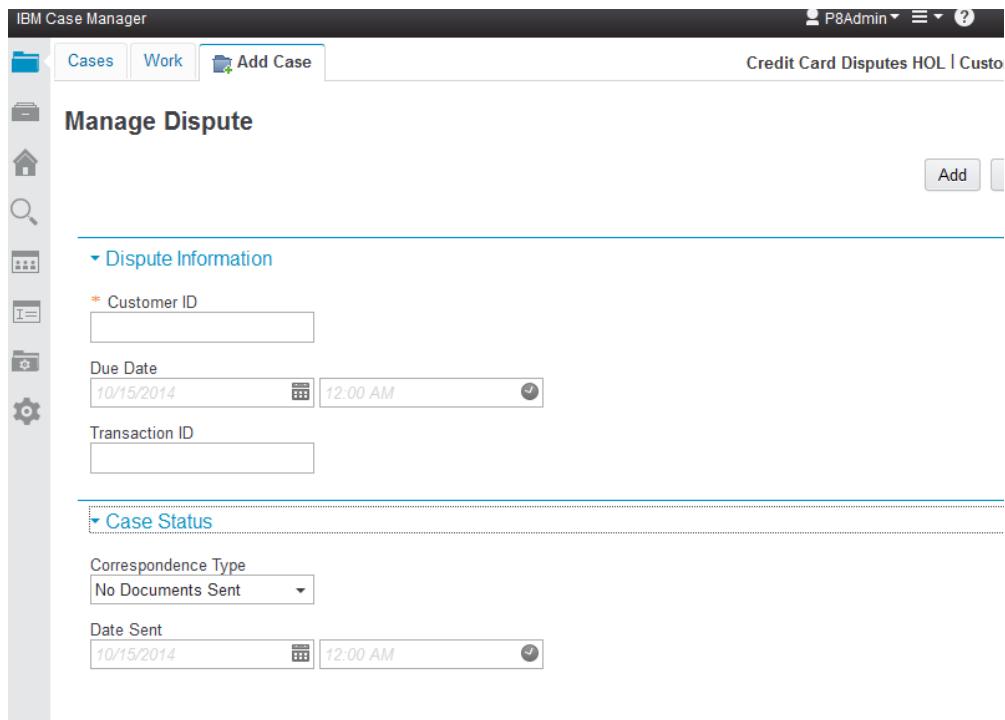
To begin working with your solution, you must first create a new case. You can do that either from the **Work** page or the **Cases** page in the default solution.

Step	Action
1	

Select the **Work** page from the tabs at the top

-
- 2 Click the **Add Case** dropdown and select the case type that was defined in Case Manager Builder – **Manage Dispute**
-

-
- 3 This will take you to the default **Add Case** page.



The screenshot shows the 'IBM Case Manager' interface. At the top, there's a navigation bar with tabs for 'Cases', 'Work', and 'Add Case'. The 'Add Case' tab is active. On the right side of the header, it says 'P8Admin' and 'Credit Card Disputes HOL | Custo'. Below the header is a sidebar with icons for Home, Search, and Properties. The main content area is titled 'Manage Dispute'. It contains two expandable sections: 'Dispute Information' and 'Case Status'. Under 'Dispute Information', there are fields for 'Customer ID' (marked with an asterisk), 'Due Date' (set to 10/15/2014 at 12:00 AM), and 'Transaction ID'. Under 'Case Status', there are fields for 'Correspondence Type' (set to 'No Documents Sent') and 'Date Sent' (set to 10/15/2014 at 12:00 AM). On the far right of the main area, there are 'Add' and 'Cancel' buttons.

-
- 4 This default page contains three main areas:
- the Case Type name in the header
 - The **Add** and **Cancel** buttons on the right
 - The Properties widget which displays the properties we chose to add to the Case Data View
-
- 5 In the Properties widget, and various others, there are **groups** that you close and expand by clicking on the triangles beside their names.
- Click the triangle next to Dispute Information to expand the group**
-

-
- 6 In the Case Data widget, we will now enter data into properties for the case.

IBM Case Manager

P8Admin ▾ ⌂ ? IBM

Credit Card Disputes HOL | Customer ... ▾

Manage Dispute

Add Cancel

Dispute Information

* Customer ID
500-12345

Due Date
10/31/2014 12:00 AM

Transaction ID
001-54321

Case Status

Correspondence Type
No Documents Sent

Date Sent
10/15/2014 12:00 AM

Enter a customer ID of **500-12345**

Choose a date and time from the pickers

Enter **001-54321** for the Transaction ID

Leave the Case Status group unchanged

- 7

Cases Work Add Case *

Credit Card Disputes HOL | Dispute

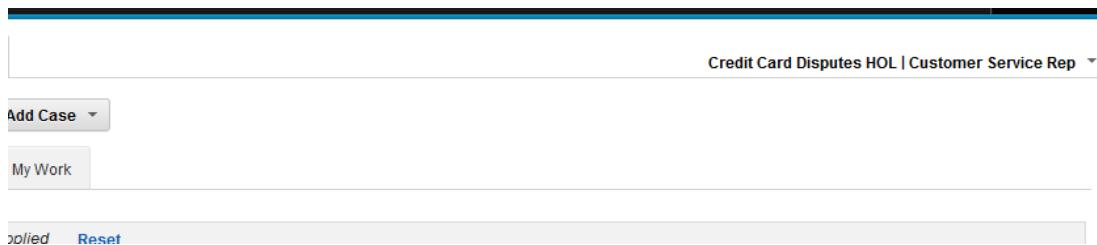
Manage Dispute

Add

Dispute Information

Click the **Add** button to create your new case

-
- 8 You will be taken back to the Work page where you started from.

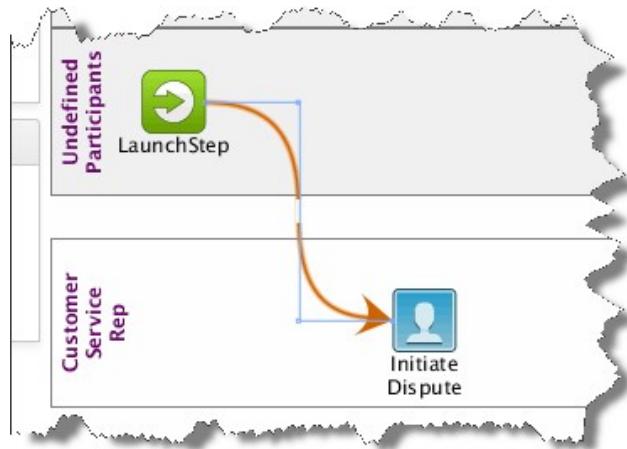


On the right side of the page, make sure the **Customer Service Rep** role is selected to see that role's view of work in the in-basket

Note that the Customer Service Rep has two in-baskets – a role in-basket and the user's personal in-basket (the latter represented by the **My Work** tab). Make sure that the role in-basket is visible by clicking on the **CSR Work** tab.

Also, clicking the tab in the in-basket will refresh the contents of the list.

-
- 9 A new work item should have appeared in the **CSR-Work** in-basket. Note that the data in the item matches what was entered when the case was created.



This work item is in the Initiate Dispute step of the task we created for this case type and assigned to the Customer Service Rep role.

To view the work item, **single click on the Due Date value** in the work item row (you can also double-click anywhere else in the row). Each value in the first column of any Case Manager in-basket has a link to open that work item.

Manage Roles Add Case ▾

CSR Work (1) My Work

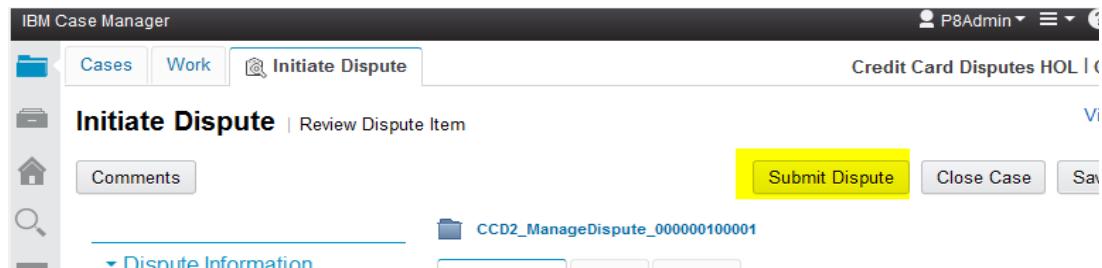
Filter: No filters applied Reset

	Due Date	Customer ID	Transaction ID	
	2013-09-15T19:00:00Z	500-12345	001-54321	

-
- 10** You are now taken to the **Work Details** page of the solution. This is the default page associated with new task steps.

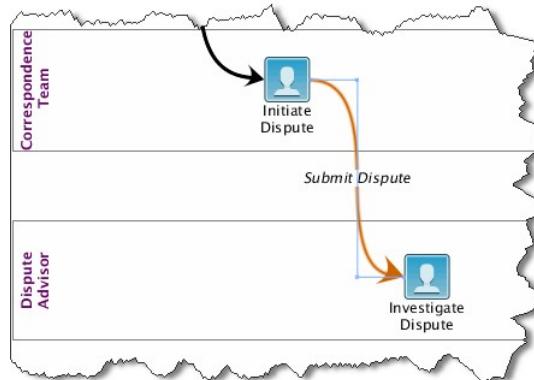
From here, you can also add a comment to the case and update case properties. From the Case Information widget you can add documents and display the Case Details page for the case associated with this work item.

-
- 11** When this step was created in the Case Manager Builder, two responses were defined that determine where the work goes next. These responses are displayed as buttons on the Work Details page.



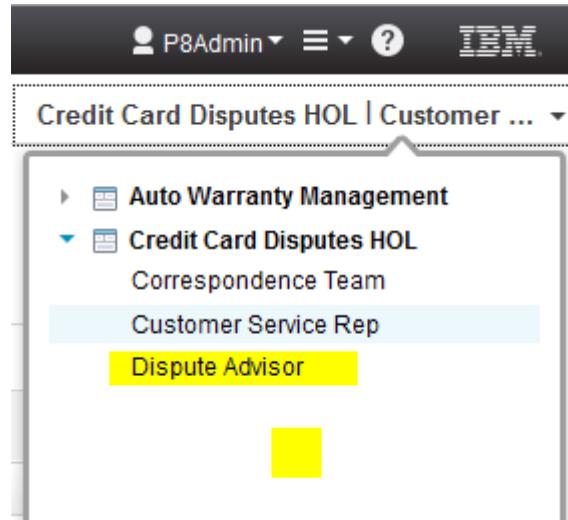
Click the **Submit Dispute** button to move the work to the next step of the task

-
- 12** This will take you back to the Work page and the Customer Service Rep in-basket. Recalling the Manage Dispute task, choosing the Submit Dispute response moved the work item to the Investigate Dispute step that was assigned to the Dispute Advisor role.



Note that the work item is no longer in the CSR Work in-basket.

13

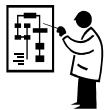


On the right side of the page, switch to the **Dispute Advisor** role by clicking the triangle next to the current role name

A screenshot of the IBM Case Manager interface. The top navigation bar shows 'IBM Case Manager', the user 'P8Admin', and the title 'Credit Card Disputes HOL | Dispute A...'. Below the title, there are tabs for 'Cases' and 'Work', with 'Work' being the active tab. There are also buttons for 'Manage Roles' and 'Add Case'. Under the 'Work' tab, there are two buttons: 'DA Work (1)' and 'My Work'. The 'DA Work (1)' button is highlighted with a yellow background. Below these buttons is a filter section with 'Filter: No filters applied' and 'Reset' buttons. A table below the filter shows one work item: 'Due Date' (10/31/2014, 12:00 AM), 'Customer ID' (500-12345), and 'Transaction ID' (001-54321). The entire table row is highlighted with a yellow background.

Note that the work item is now in the Dispute Advisor's in-basket.

Having done a successful deployment, you are now ready to further enhance your solution.



5.0 Step-by-Step – Working in Process Designer

There are occasions where you need to step outside of the Case Manager Builder environment to implement functionality for your solution using other tools in the P8 platform, such as the P8 Process Designer. The most typical use cases include calling out to custom components using the Content Platform Engine component integrator and special assignment for case properties.

In this section, we will describe a scenario where you might do that. You will automate the Generate Correspondence task to automatically send a dispute acknowledgement via email and set case properties to reflect that it was sent. You will use Process Designer to do this.

5.1 -- Inspecting Generate Correspondence in the Case Builder Step Designer

Step	Action
1	Start the IBM Case Manager Builder by opening your web browser and going to the URL provided.
2	Login into the IBM Case Manager Builder as the business analyst Enter P8Admin for the user id Enter filenet for the password
3	You will see the Manage Solutions page similar to this:

Solution Name	Solution Prefix	Last Modified
Healthcare Payer Claims Processing	HPCP	12/16/2013, 2:59 PM
Healthcare Fraud Prevention	HFP	12/16/2013, 2:54 PM
Government Assistance	GA	12/16/2013, 2:50 PM
EmployeeLogistics	ELC	12/16/2013, 2:43 PM
Credit Card Disputes HOL	CCD2	12/16/2013, 2:35 PM
Credit Card Disputes	CCD1	12/16/2013, 2:34 PM
Auto Warranty Management	AWM	12/16/2013, 2:31 PM

From this page, you can see other solutions that have already been created on this system as well.

-
- | | |
|---|--|
| 4 | Locate the Credit Card Disputes HOL solution and click on Edit |
|---|--|
-

5

Created by P8Admin
Created on September 9, 2013

Properties Roles In-baskets Document Types Pages Case Types

Add Property OK All

Name ^	Type	Description
Correspondence Type	Integer	
Customer ID	String	
Date Sent	DateTime	
Due Date	DateTime	
Transaction ID	String	

Click on Case Types

6

Created on September 9, 2013

Properties Roles In-baskets Document Types Pages Case Types

Add Case Type

Manage Dispute Process for handling disputed transactions

Click the Manage Dispute case type

7

Manage Solutions \ Credit Card ... \ Manage Dispute

Case Type

Properties

Views

Case Folders

Rules

Tasks

Case Type Attributes

* Case type name: Manage Dispute

* Case type unique identifier: CCD2_ManageDispute

Case type description: Process for handling disputed transactions

Starting document type: <None>

External repository:

Allow documents and attachments from repositories other than the case management object

Display system-generated titles initially instead of the original document titles

Enable case workers to create custom tasks

Default layout for Add Case page: Add Case

Default layout for Split Case page: Split Case

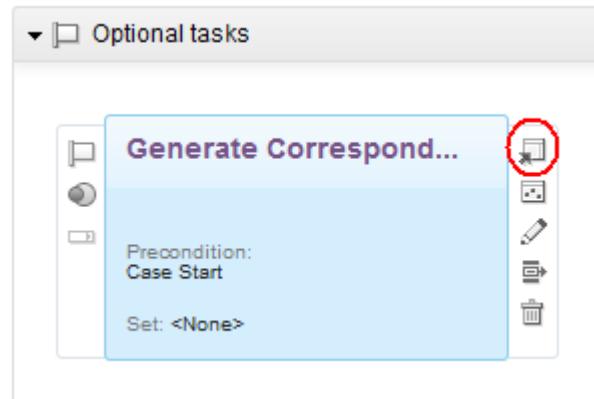
Default layout for Case Details page: Case Details

Override default case details page layout for:

Correspondence Team

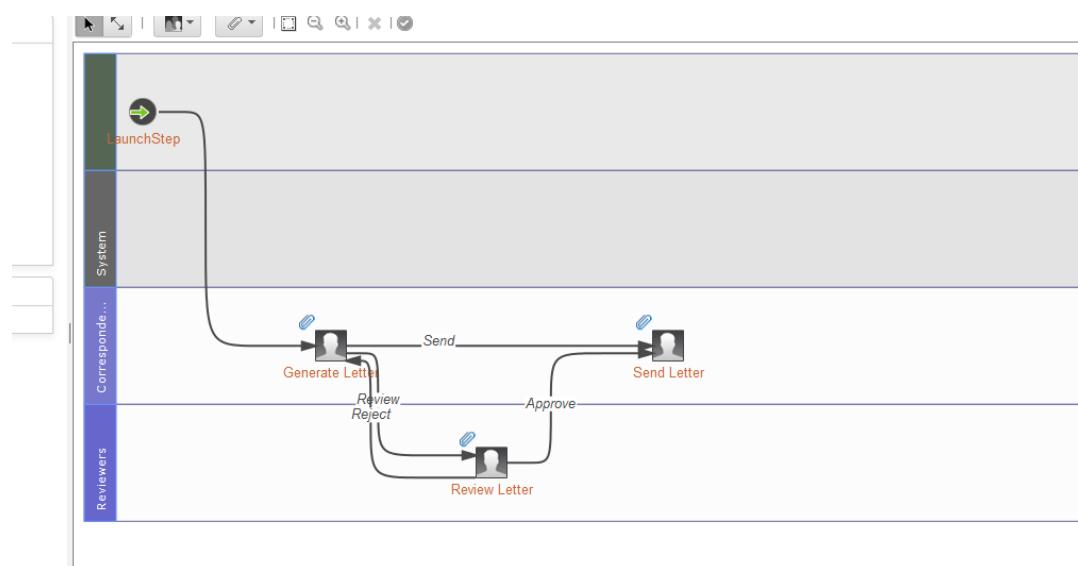
Role

Select the **Tasks** section from the list on the left

8

Hover over the **Generate Correspondence** task to reveal the **Step Editor** icon on the right side. Click on it.

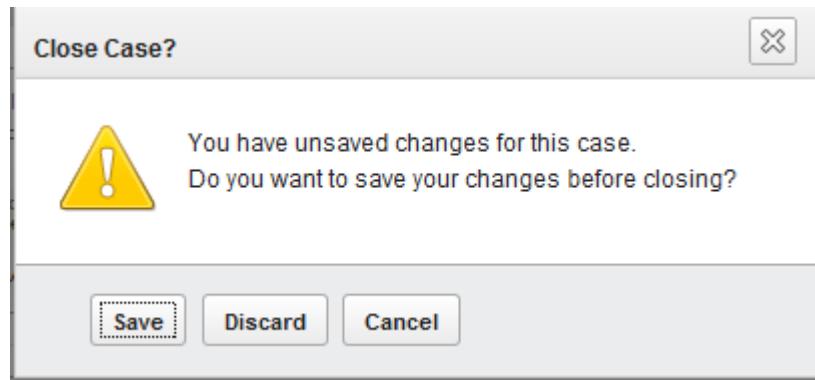
9



Once the step editor opens the task you can see the flow for the Generate Correspondence task. When the task is launched, it goes to a Correspondence team person. The Correspondence team member then generates an acknowledgement and either sends it off directly or sends it to a reviewer to be reviewed. There may be several review iterations if necessary. Ultimately the acknowledgement gets sent to the correspondence team again, where it is manually sent. We would like to automate the send letter portion of the task to make it more efficient. We would also like for the case property **Date Sent** to be recorded once the acknowledgement is sent.

10 Close the step editor.

11



If you are prompted to save changes, click on **Discard**

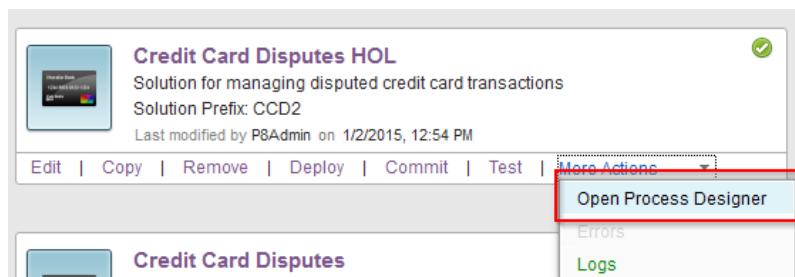
12 Now click on **Back** to return to the main page for the solution, then **Close** to exit the Solution. Each time, click on **Discard** if prompted as above.

5.2 -- Opening and Editing the task in Process Designer

You will now add an automated step to the Generate Correspondence task using Process Designer.

Step	Action
------	--------

- 1a** Close the Solution and navigate to the Solutions Palette. Open the solution in Process Designer.



- 1b** If you get a security warning, click on **OK** to proceed to the Process Designer

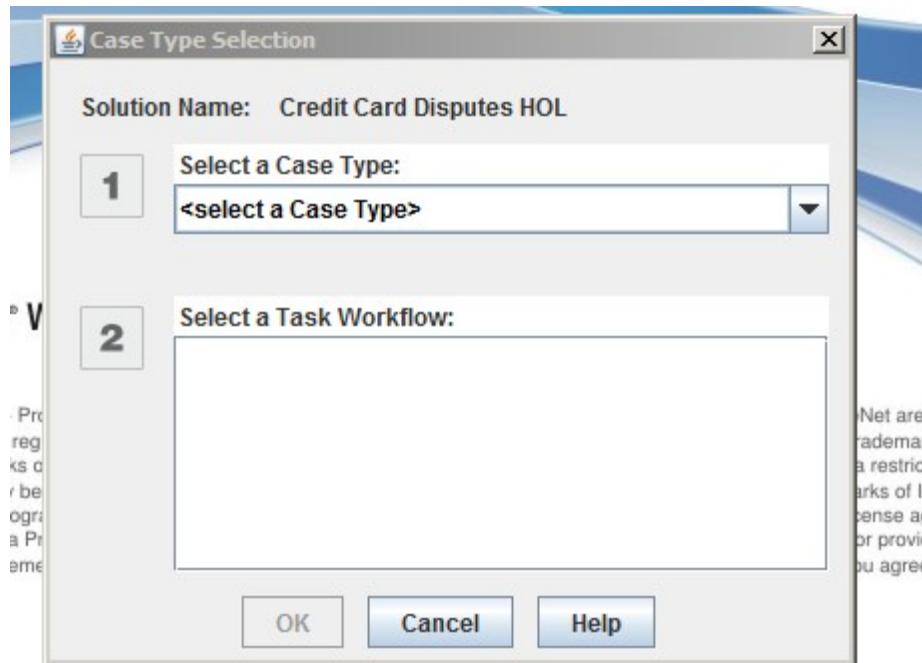


If you get a “block potentially unsafe components” message, click **No**

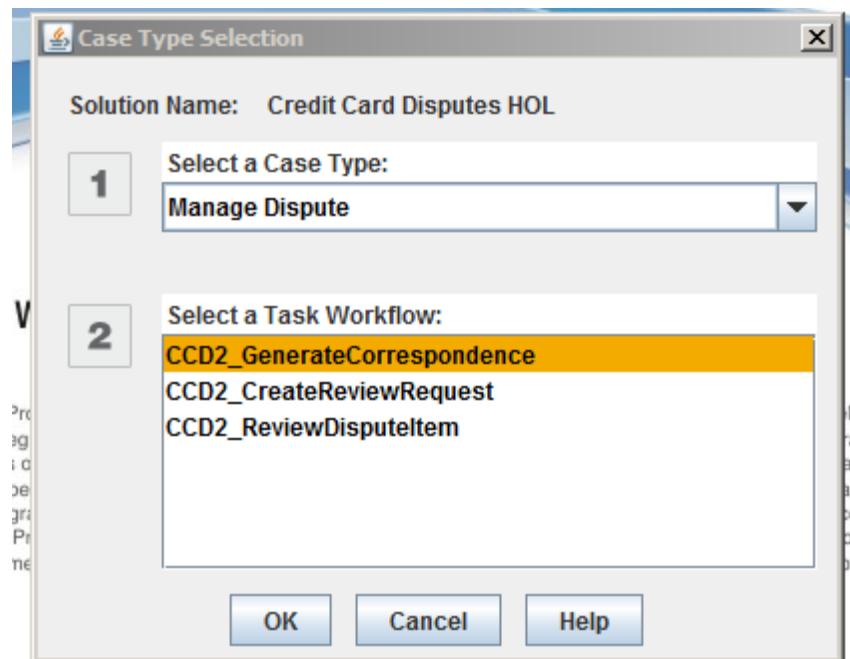


-
- 2** Process Designer opens with a new workflow definition containing only a LaunchStep:
-

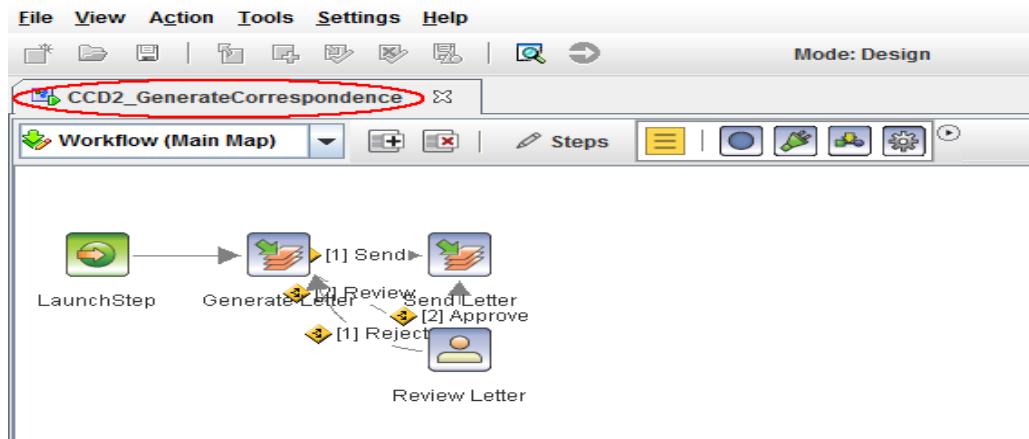
-
- 3 In the **Case Type Selection** dialog, select **Manage Dispute** and click **OK**



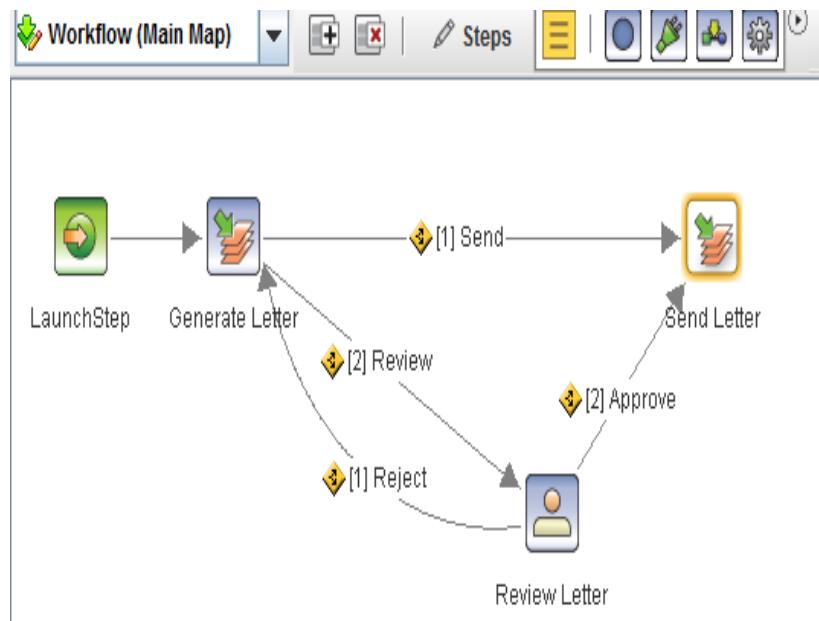
You should see a workflow definition for one of the tasks of the Manage Dispute case type. Select the **Generate Correspondence** task in the list of task workflows and click Ok.



- 4 You should see something similar to this:



- 5 You can select the individual steps and drag them around so they more closely reflect the map as it is shown in the step editor of the Case Builder



- 6

Workflow Properties						
Send Letter		Review Letter				
General		Data Fields		Attachments	Workflow Groups	Maps
Attachments		Workflow Groups		Maps	Milestones	Web Services
Data Fields						
	Name	Type	Merge Type	Expression	Description	
	CCD2_DateSent	Time	Default	systemtime()		
	CCD2_CorrespondenceType	Integer	Default	0		
	CCD2_DueDate	Time	Default	systemtime()		
	CCD2_TransactionID	String	Default	""		
	CCD2_CustomerID	String	Default	""		
		Boolean	Override	true		

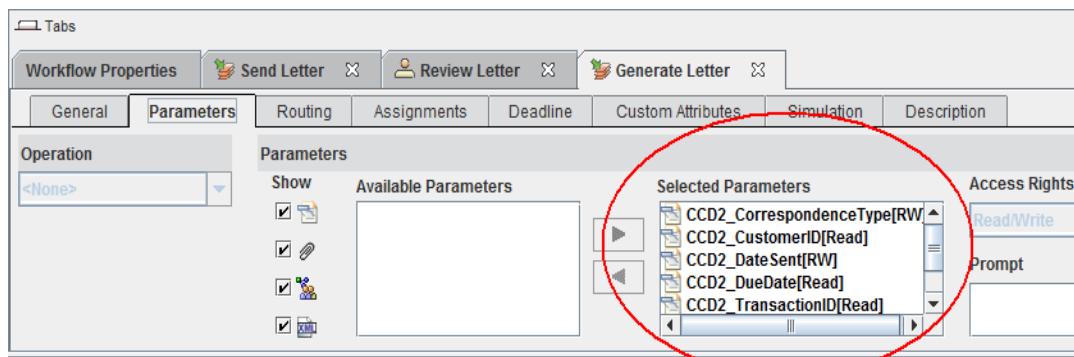
In the **Workflow Properties** tab, click on the **Data Fields** sub-tab and note the case properties that show up here as data fields

-
- 7 Click on the icon for the **Generate Letter** step in the workflow diagram

This will add a Generate Letter tab that displays the properties for the step. Click on that tab if it wasn't automatically selected.

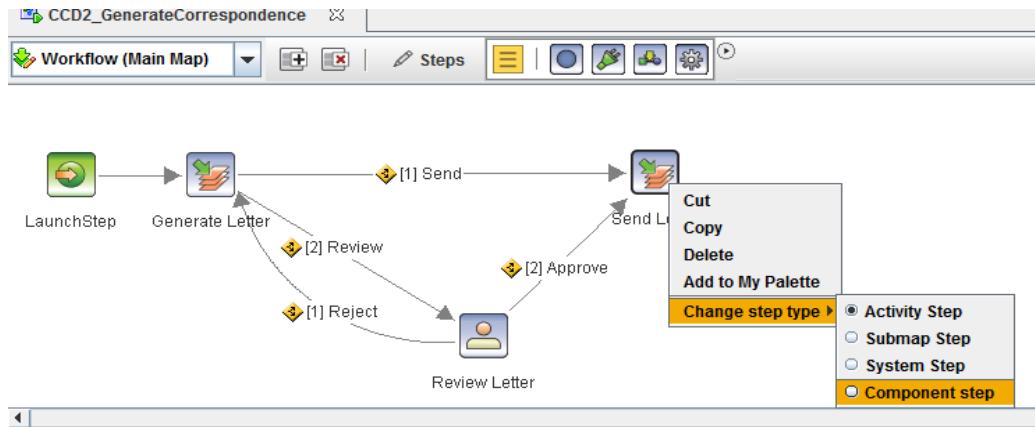
-
- 8 Click on the **Parameters** sub-tab to see the various parameters that were set up earlier in the Case Manager Builder Step Editor, and the data attachment (the Letter).

-
- 9 Within Process Designer, you can read the values for these properties and set the values using assignment operations. Those changes will be reflected in the case properties you set up in Case Manager Builder.



-
- 10 We are now going to automate the Send Letter step by invoking the CE_Operations component sendmailattachment function

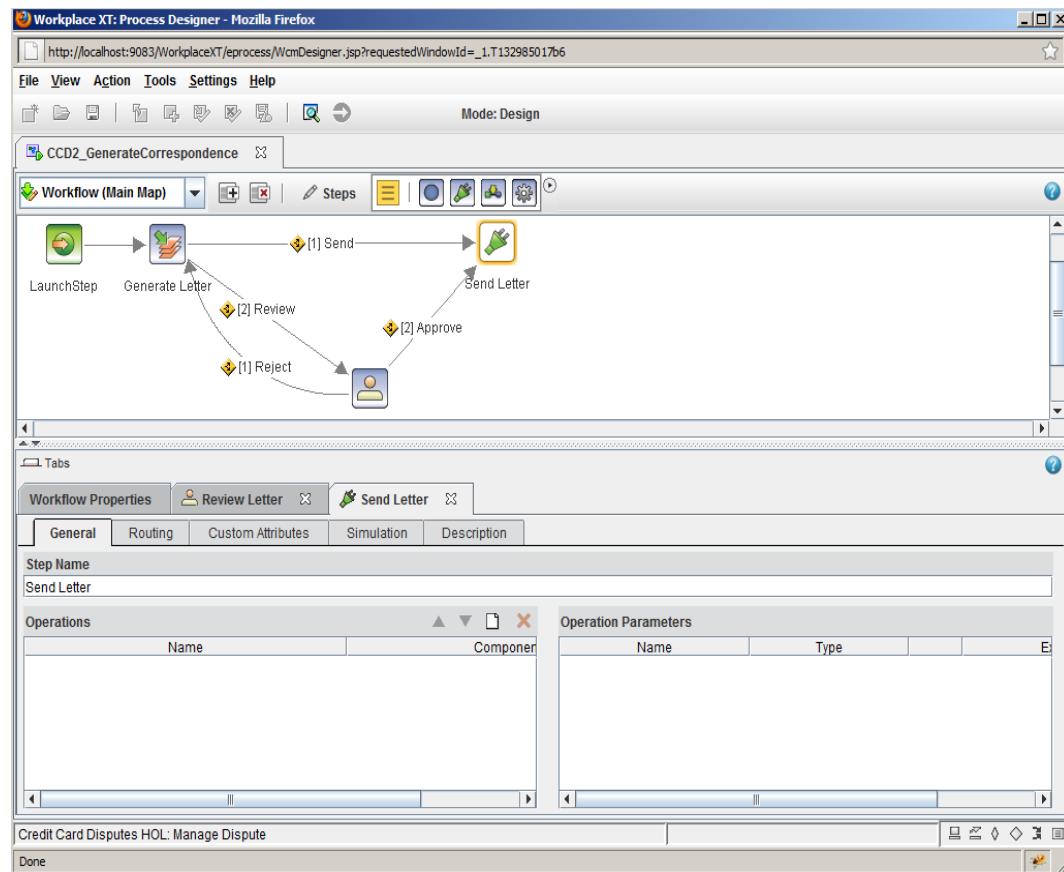
Click on the **Send Letter** step in the map, then right-click **Send Letter** and choose **Change Step Type → Component Step**



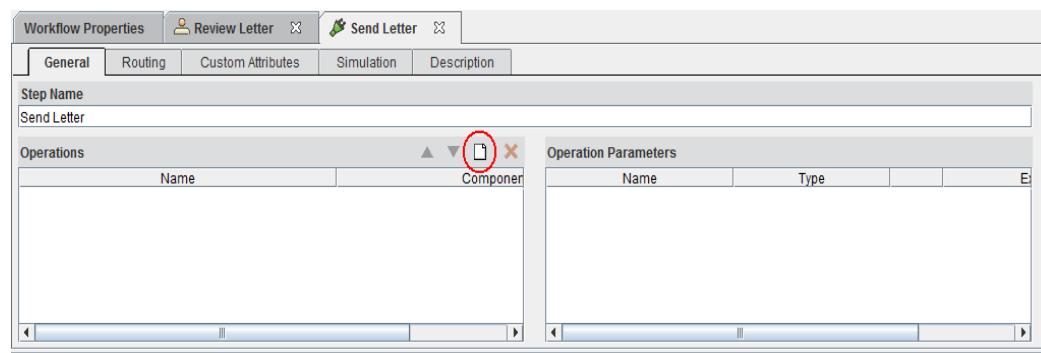
- 11 The designer should look like the following. Note the step icon has changed to that



of a component step and that the context for the step below has changed.

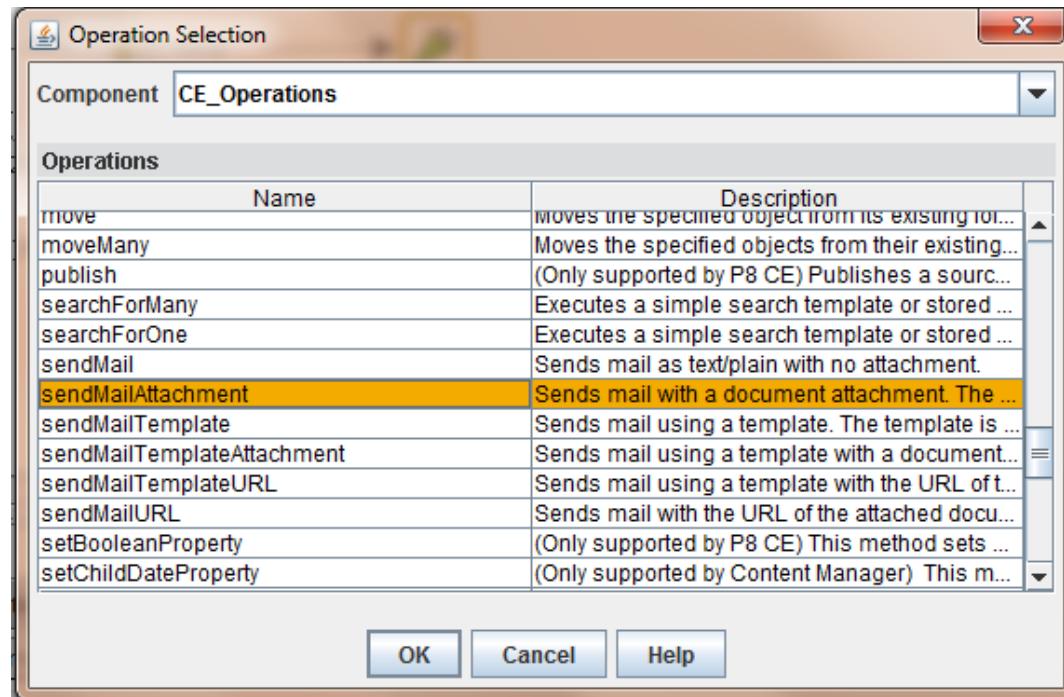


- 19 On the **General** tab for the **Send Letter** step, click on the **Add** icon



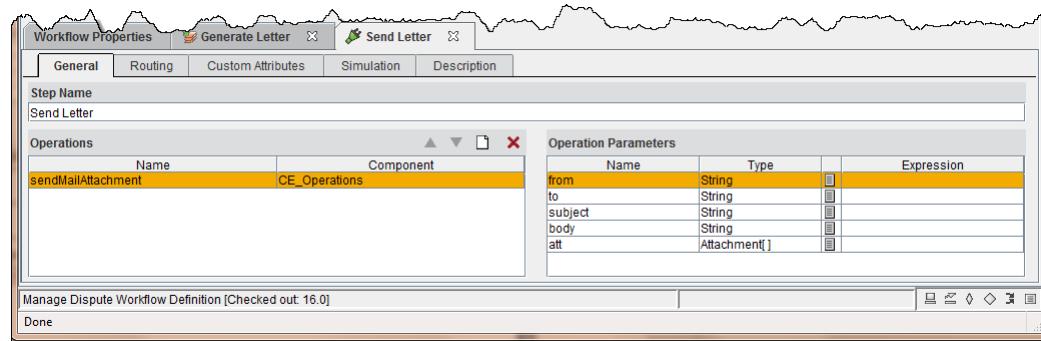
-
- 20 A menu of all available components and their operations will be displayed. In our process environment we only have the CE_Operations installed. CE_Operations provides a wide range of Content Engine activities you may need to perform outside of the Case Builder step designer.

Select the **sendMailAttachment** operation then click **OK**

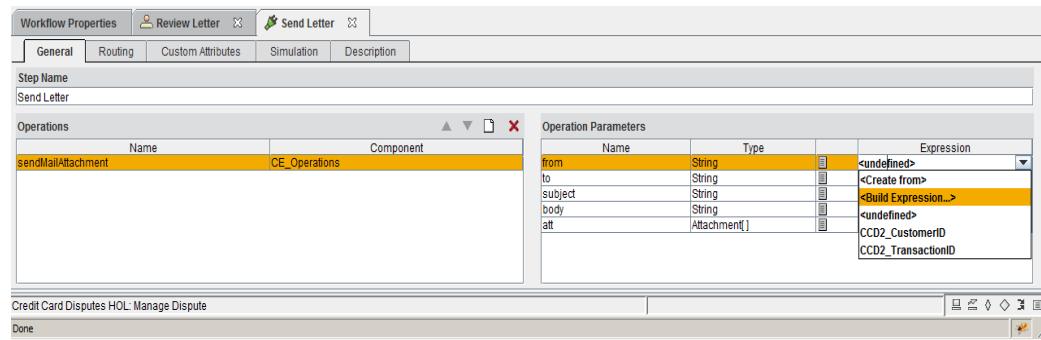


-
- 21** Once the operation is selected, the required parameters and their data types are displayed on the right hand side. These parameters may come from any number of places. Normally we use workflow data fields that get passed into the workflow which come from the case, or may build more complex expressions using system parameters, etc. In this example, we have the actual letter to be sent that was passed in as an attachment to the workflow. In our example we did not pass in the “to”, “from”, “subject”, or “body” from case properties so we will use literals in this example to keep it simple.

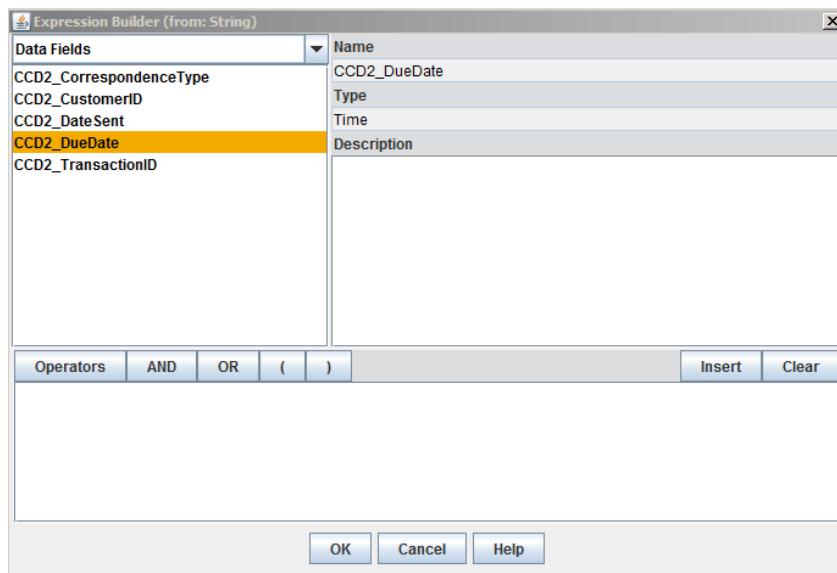
In a more production type of workflow, we could create another automated step prior to this one where we would do a database lookup using the workflow data field Customer ID which was passed into the workflow from the case properties. Then we would have the customer's email address returned as a workflow parameter and plug it into the email address field.



-
- 22** Click in the “from” parameter row in the expression column. You will see a little drop down on the right hand side which provides a list of available ways to set the parameter value. Choose <Build Expression...>



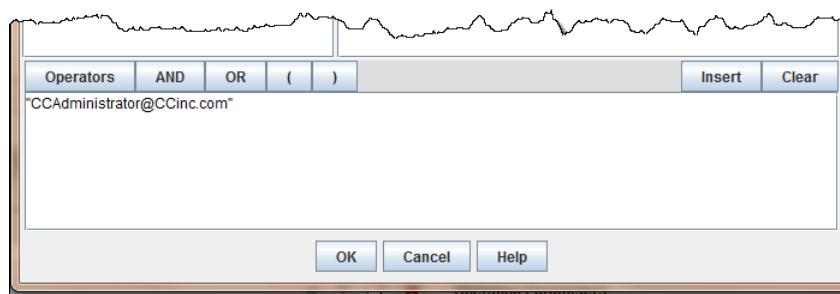
-
- 23 The expression builder gives the designer access to functions, data fields, attachment fields, system fields, and more. Spend a couple of minutes exploring all the various options.



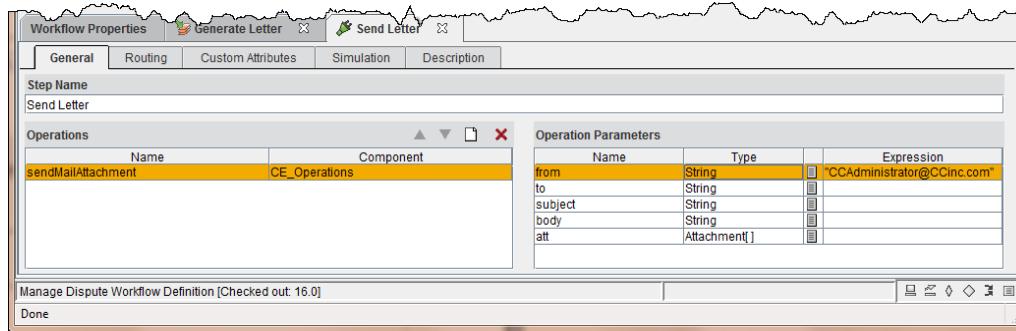
-
- 24 For providing a string literal, which is what we are going to do for simplicity's sake, type the value

"CCAdministrator@CCinc.COM"

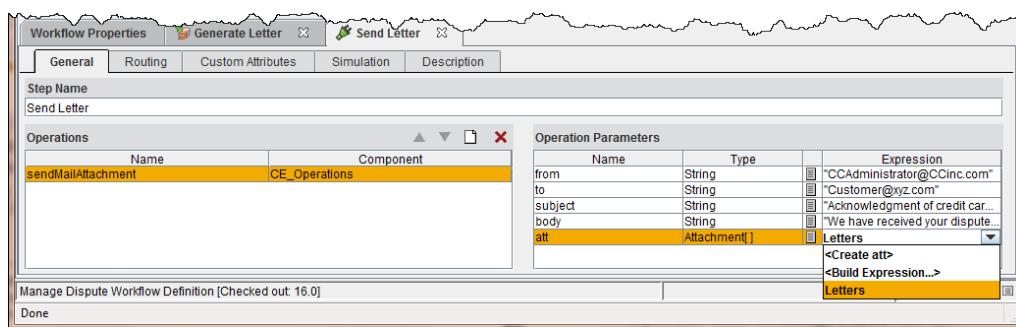
including the double quotes, into the box on the bottom, then click **OK**. (In this case it doesn't matter what is selected in the menu at the top left.)



-
- 25 You will be returned to the Send Letter main tab with the expression filled in.



- 26 Repeat the procedure to set values for “to” , “subject”, and ““body” using “Customer@xyz.com”, “Acknowledgment of credit card dispute”, and “We have received your dispute for a charge on your credit card. Official statement attached”, respectively.
-
- 27 For the att parameter, notice that Letter shows up on the drop down menu because it is a data field that matches the parameter type – and is what we want to send to the customer. Choose **Letter** for att

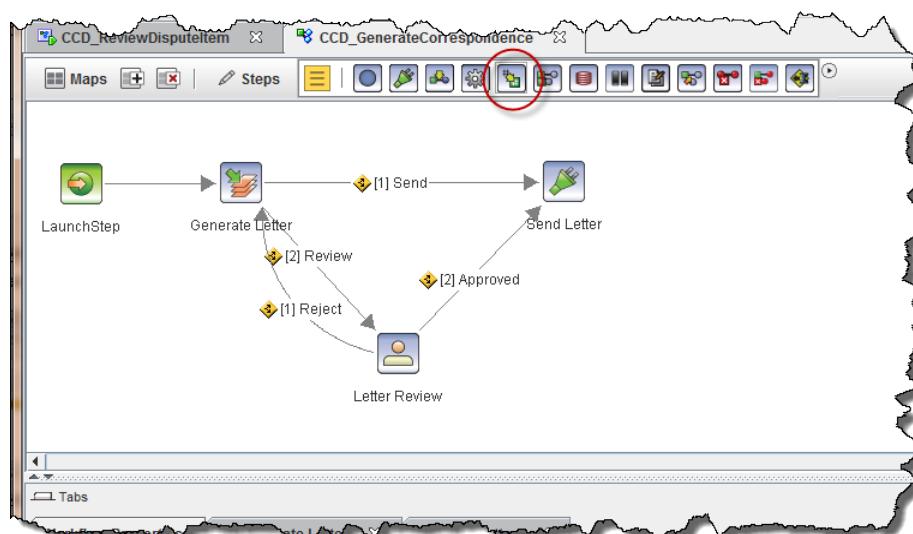


-
- 28 Send Letter is now a component step and will execute automatically without any user interaction.
- Before continuing, you may wish to use **File → Solution → Save** to prevent your changes thus far from being lost if a timeout occurs.
-

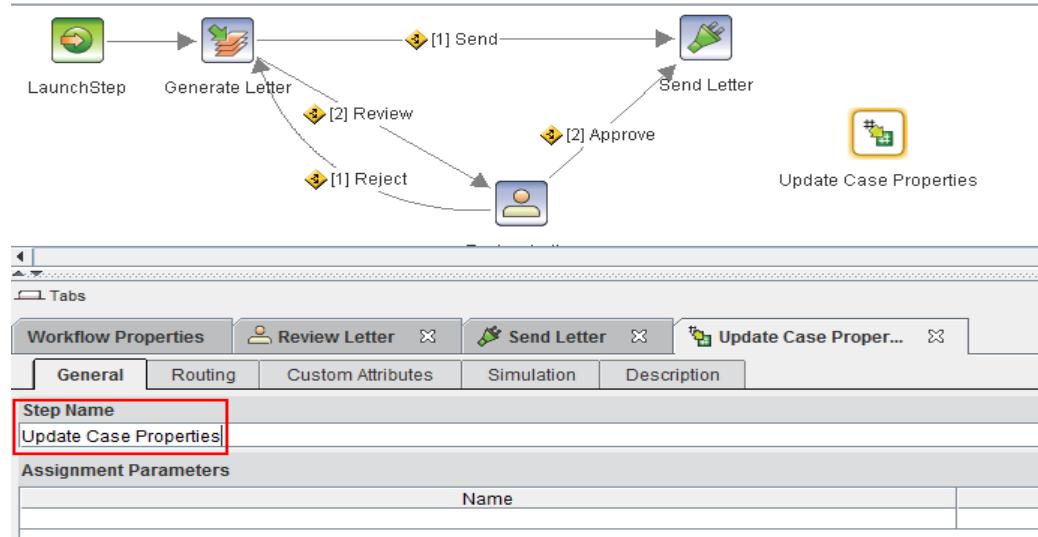
- 29 The last thing we need to do is to set the **DateSent** case property so it will be recorded for the case. For this we will use the **Assign** system function, which is indicated by this icon:



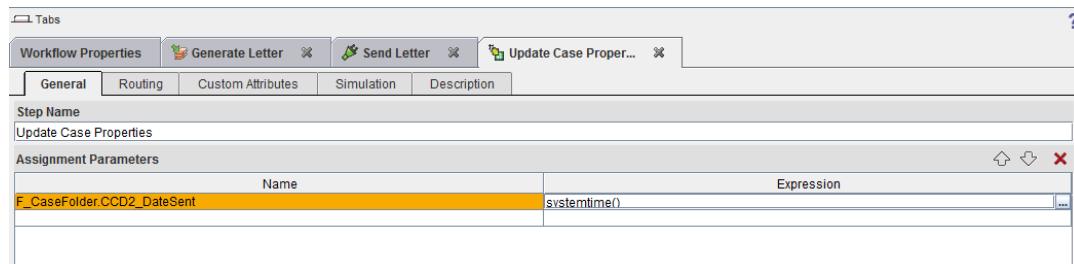
Either **double-click** OR **drag and drop** the Assign function onto the workflow map to create a new step. (If this icon is not shown, click on the Palette Menu arrow to the right of the icons, then check **General System Palette**.)



- 30 Next click on the Assign step, then the General tab below, and type **Update Case Properties** into the Step Name field

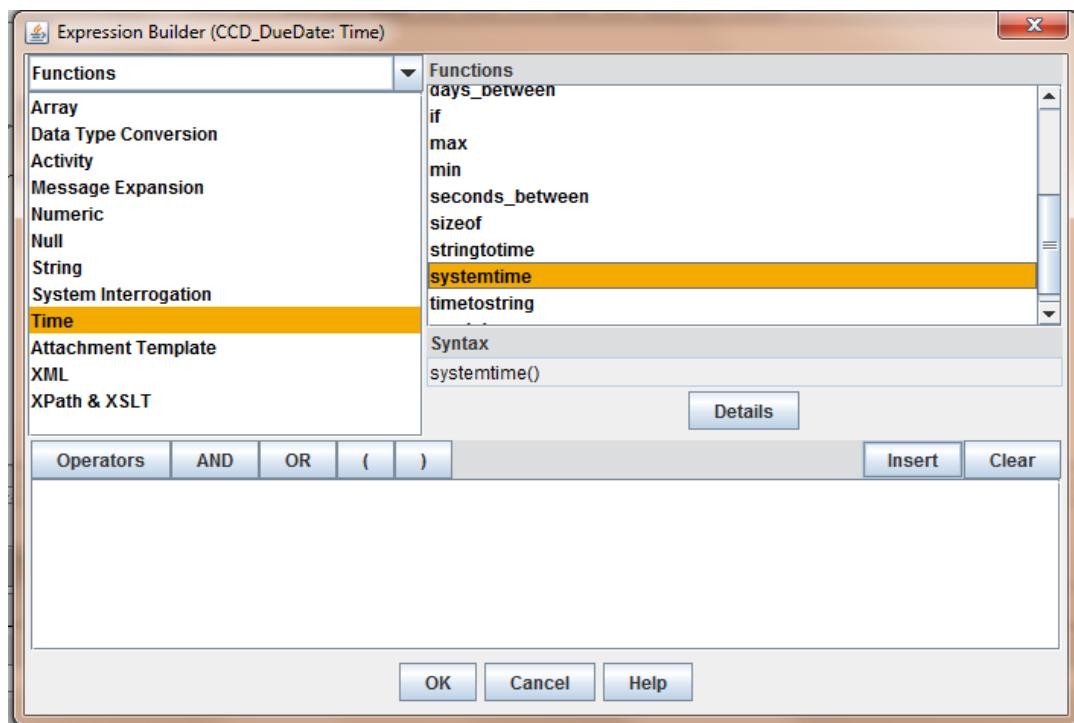


-
- 31** We will now set the **DateSent** case property to the current time as the acknowledgement has just been sent in the previous step. With the **General** tab selected, click on the blank line in the Assignment Parameters column (below Name) and type the symbolic name **F_CaseFolder.CCD2_DateSent** into the field under the Name column.

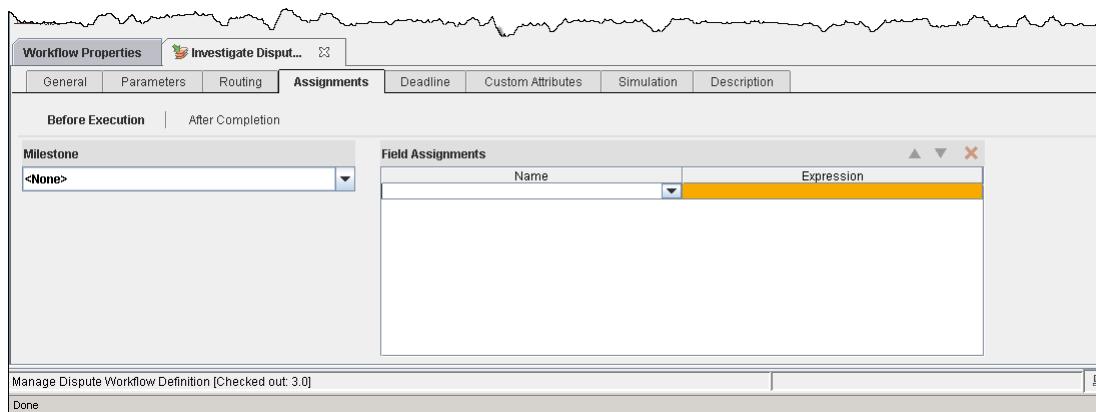


F_CaseFolder is the reference to the case instance. Using **F_CaseFolder** means the assignment will be applied to the case property and not the workflow data field.

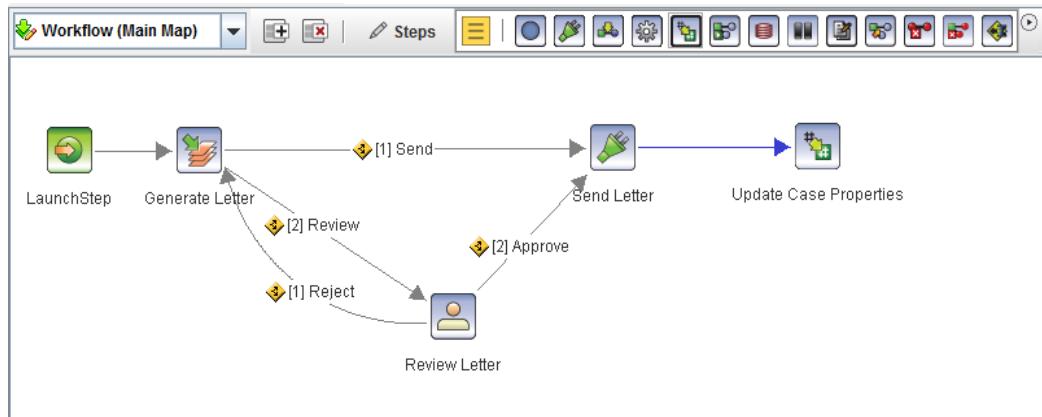
-
- 32** Next we will provide the value for Date Sent by clicking on the same line, this time in the Expression Column, and clicking on the on the far right.
-
- 33** In the Expression Builder select **Functions** from the drop down at the top left, then select **Time** functions and then finally **systemtime** from the right hand side. Click **Insert** and then **OK** to return the expression back to the assignment screen



- 34 The assignment step is complete. Note that data field assignments can be made in either an Assignment step, as we just performed, or they can be made in an Activity step, as appropriate. If you click on an activity step such as **Generate Letter** or **Letter Review** you will see an Assignment tab. Field assignments for an Activity step may be made before or after execution of the step. When developing ICM applications this will be of great use to the developer.



- 35 Now we will connect the **Update Case Properties** step to the **Send Letter** step by clicking just to the right of the **Send Letter** and dragging to the **Update Case Properties**. The result should look similar to below



- 36 Check in your changes to this workflow in the Process Designer via **File – Solution – Save and Close**

If necessary, click on **File → Exit** to close the Process Designer, then close the applet window.

5.3 -- Viewing your changes in the Case Manager Builder

Step	Action
1	Start the IBM Case Manager Builder by opening your web browser and going to the URL provided.
2	Login into the IBM Case Manager Builder: Enter P8Admin for the user id Enter filenet for the password
3	You will see the Manage Solutions page.

The screenshot shows the 'Manage Solutions' page of the IBM Case Manager Builder. The page has a header with 'IBM Case Manager Builder', a user dropdown ('P8Admin'), and a search bar ('Search'). Below the header is a toolbar with 'Reset Test Environment' and 'Refresh Solutions'. The main area displays a grid of solution cards:

- Add a Solution**: A yellow card with a 'No template' dropdown and an 'Add Solution' button. There is also a checkbox for 'Use the wizard to define the solution'.
- Healthcare Payer Claims Processing**: Solution Prefix: HPCP. Last modified by P8Admin on 12/16/2013, 2:59 PM.
- Healthcare Fraud Prevention**: Solution Prefix: HFP. Last modified by P8Admin on 12/16/2013, 2:54 PM.
- Government Assistance**: Solution Prefix: GA. Last modified by P8Admin on 12/16/2013, 2:50 PM.
- EmployeeLogistics**: Employee Travel and Logistics. Solution Prefix: ELC. Solution Icon: A blue icon. Last modified by P8Admin on 12/16/2013, 2:43 PM.
- Credit Card Disputes HOL**: Solution for managing disputed credit card transactions. Solution Prefix: CCD2. Last modified by P8Admin on 12/16/2013, 2:35 PM.
- Credit Card Disputes**: Solution for managing disputed credit card transactions. Solution Prefix: CCD1. Last modified by P8Admin on 12/16/2013, 2:34 PM.
- Auto Warranty Management**: Warranty Management System for Automotive manufacturer. Solution Prefix: AWM. Last modified by P8Admin on 12/16/2013, 2:31 PM.

4

Credit Card Disputes HOL
Solution for managing disputed credit card transactions
Solution Prefix: CCD2
Last modified by P8Admin on 12/16/2013, 2:35 PM

Edit | Copy | Remove | Deploy | Commit | Test | More Actions

- Locate the Credit Card Disputes HOL solution and click on Edit

5

IBM Case Manager Builder

Manage Solutions \ Credit Card Disputes HOL

Credit Card Disputes HOL
Solution for managing disputed credit card transactions

Solution prefix: CCD2
Created by P8Admin
Created on December 16, 2013

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

Add Case Type

Manage Dispute Process for handling disputed transactions

- Click on Case Types
-

6

Properties Roles Document Types Personal In-basket Case Types

Add Case Type

Manage Dispute Process for handling disputed transactions

- Click the Manage Dispute case type
-

7

Manage Solutions \ Credit Card ... \ Manage Dispute

Case Type

- Properties
- Views
- Case Folders
- Rules
- Tasks**

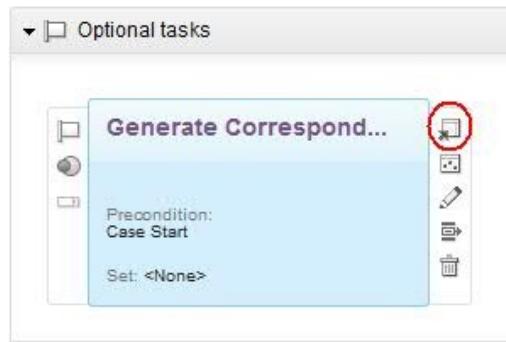
Case Type Attributes

*Case type name:

*Case type unique identifier:

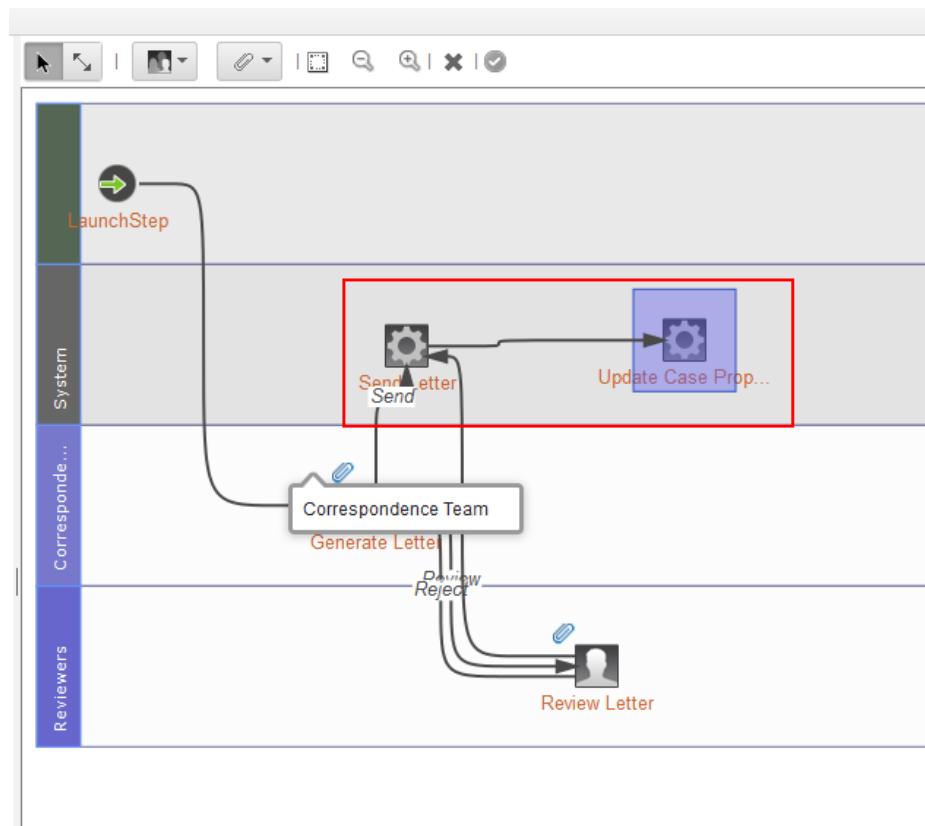
Case type description:

- Select the Tasks section from the list on the left
-

8

-
- Hover over the Generate Correspondence task to reveal the Step Editor icon on the right side. Click on it.
-

- 9 Notice that the **Send Letter** step, which was previously in the Correspondence Team swimlane, is now in the System swimlane. This is because we used Process Designer to change the step to be an (automated) Component step. Similarly, the **Update Case Properties** step is in the System swim lane because we added it as an Assign step in Process Designer.



-
- 10** In the palette you will see Stub step that can only be added to the System swimlane, and it can be used as a placeholder for further work to be done, such as in Process Designer.

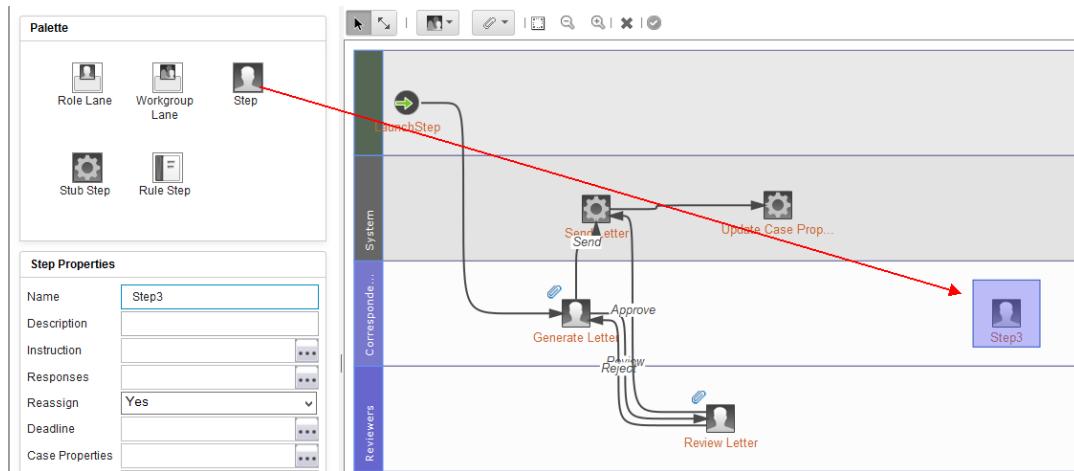
For example, in section 5.1 above, before using the Process Designer for this workflow, we could have added Stub steps for Send Letter and Update Case Properties, then connected them as above. Because the only properties of a Stub step that are visible in Step Editor are Name and Description, you would still need to use Process Designer to complete the definition of the step, as we did in section 5.2.

5.4 -- Completing the change in Case Builder

To continue to extend the task in the Step Editor, we will add another step for a manual audit of the Send Letter process. In this step we can verify that the case properties have been updated properly. The new step will be assigned to the correspondence team.

Step Action

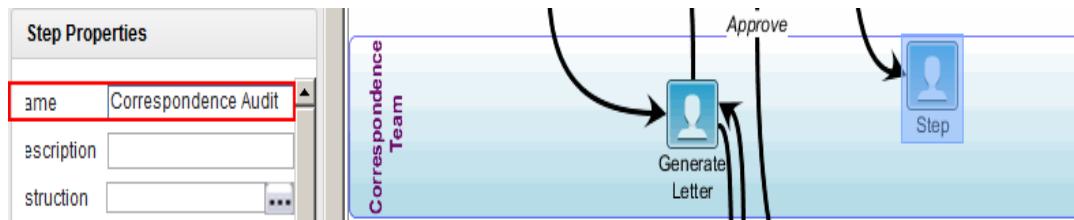
1



Click and hold the **Step** button from the palette to drag it on to the canvas and drop it in the **Correspondence Team** swimlane

2

With your **new step selected**, let's use the Step Properties area to set some properties.



Enter **Correspondence Audit** as the name of the step.

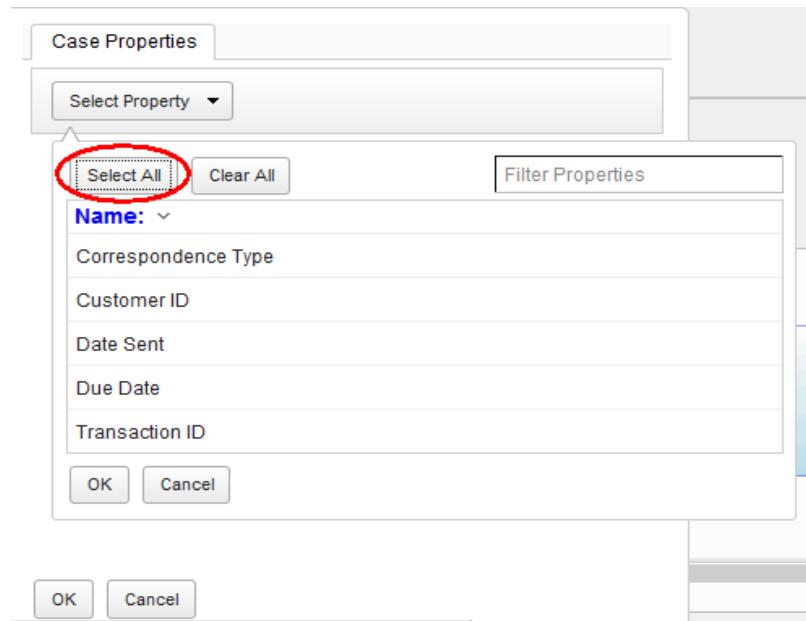
3

In the Step Properties area, click on the Edit icon to the right of **Case Properties**.



4

Click Select Property

5

Click on **Select All** to select all properties

Click the **OK** button

A screenshot of the same "Case Properties" dialog box. It shows a table of properties and their access levels:

Case Properties	Read only	Read and write
Date Sent	<input checked="" type="radio"/>	<input type="radio"/>
Correspondence Type	<input checked="" type="radio"/>	<input type="radio"/>
Due Date	<input checked="" type="radio"/>	<input type="radio"/>
Transaction ID	<input checked="" type="radio"/>	<input type="radio"/>
Customer ID	<input checked="" type="radio"/>	<input type="radio"/>

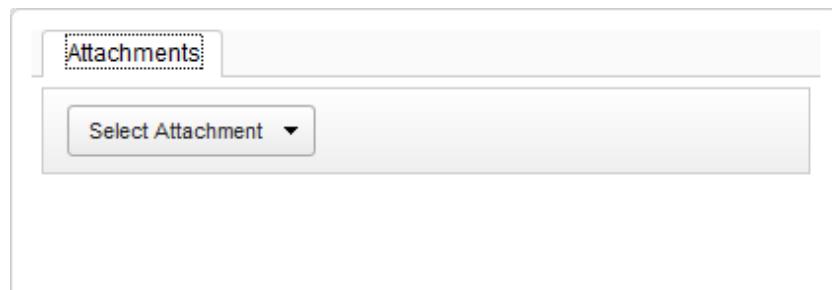
At the bottom are "OK" and "Cancel" buttons.

By default all the properties are set to "Read and write". Set them all **Read Only** and click **OK**.

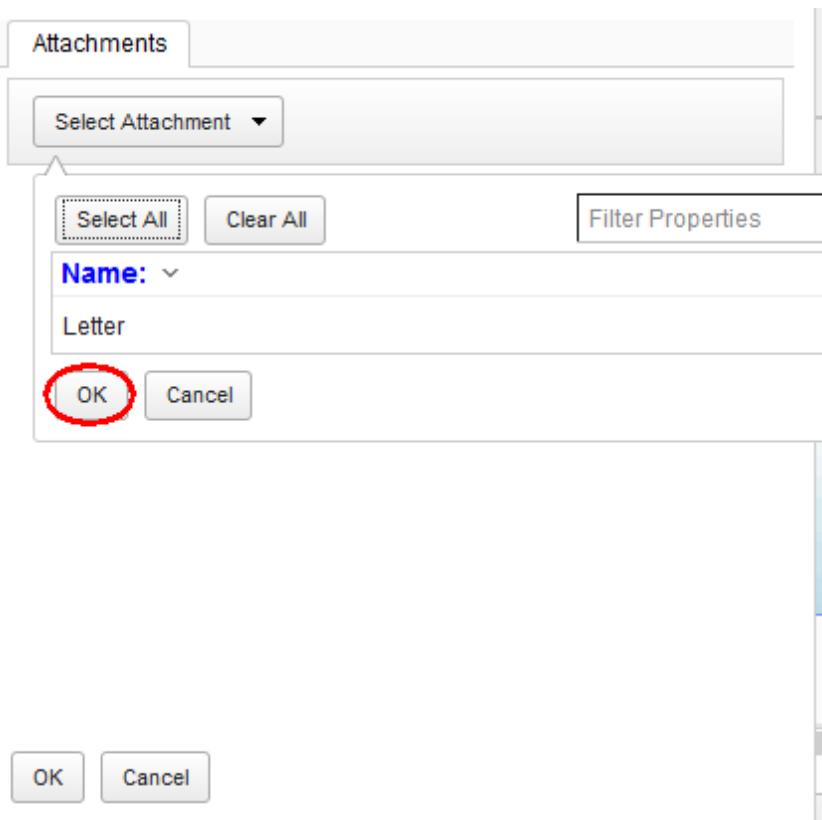
-
- 6 In the Step Properties area, click on the Edit icon to the right of **Attachments**.



Click on **Select Attachment**



7 Select **Letter** then **OK**

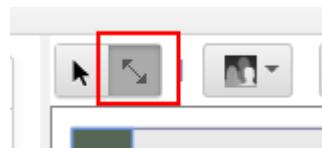


Next make it **Read Only**

Click OK

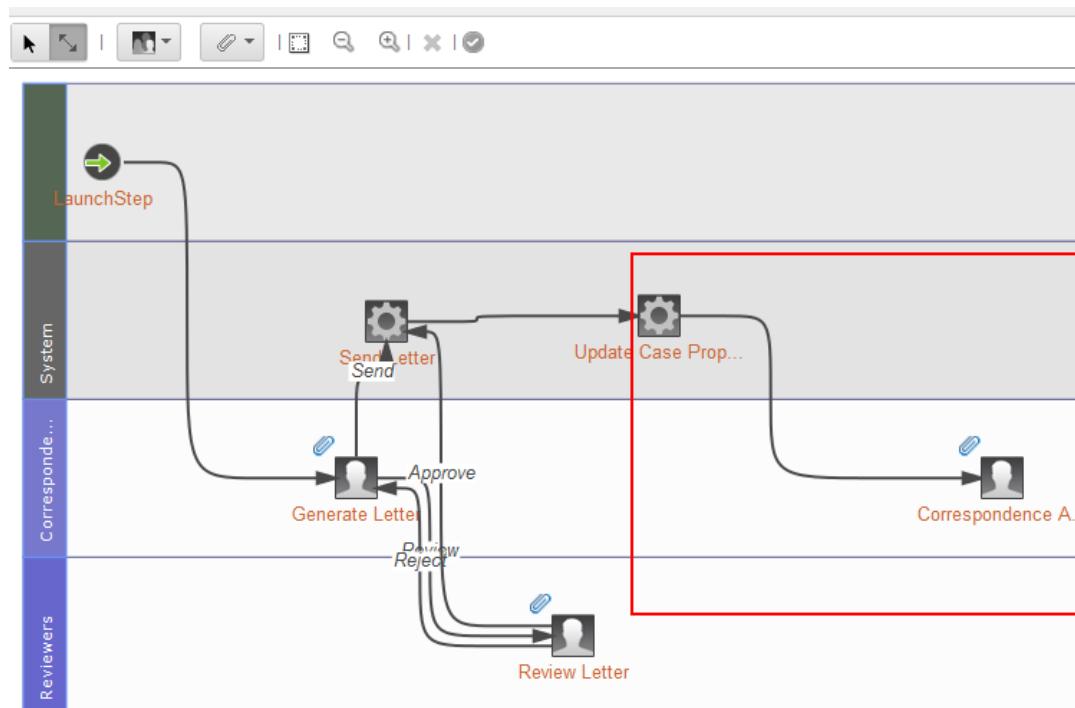


-
- 8 Click on the **Connector** above the swimlanes.



-
- 9 You are now going to connect the **Update Case Properties** step to your new **Correspondence Audit** step

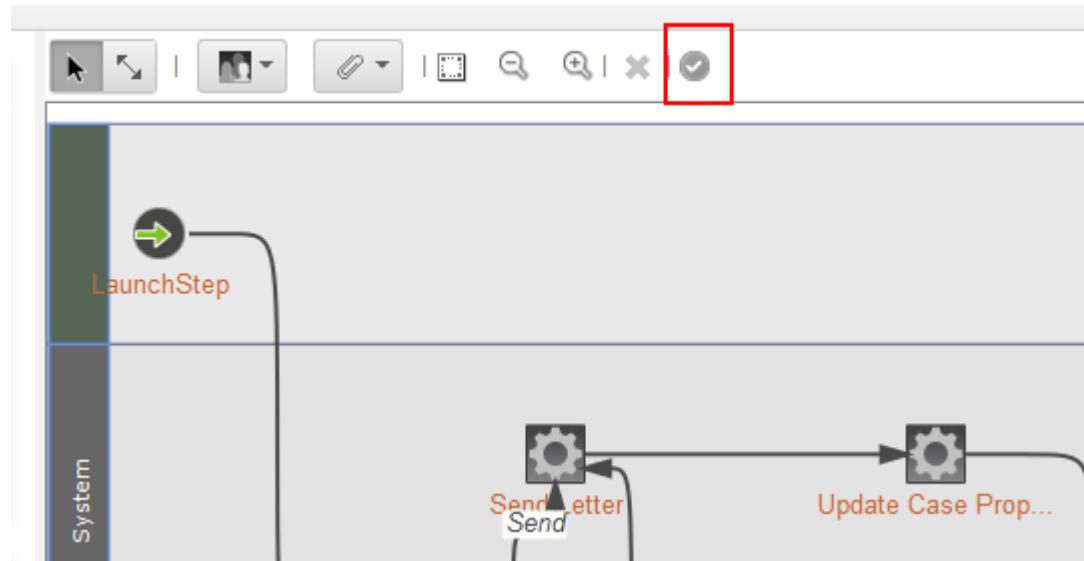
Select the Update Case Properties and drag over onto the Correspondence Audit step



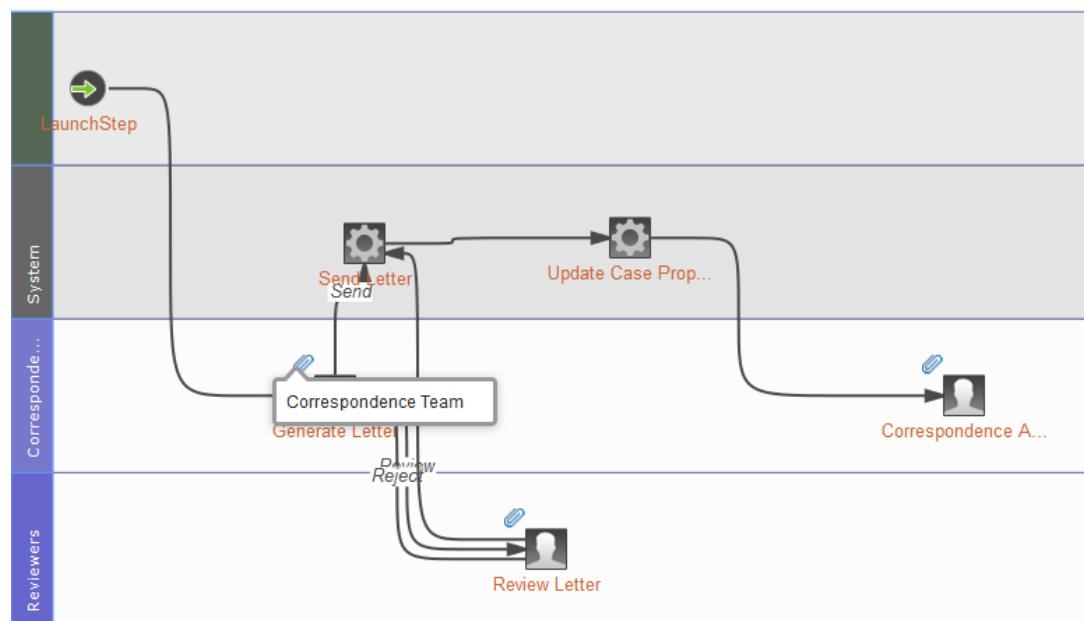
This will produce a connector between those two steps.

10 The Round Trip is complete

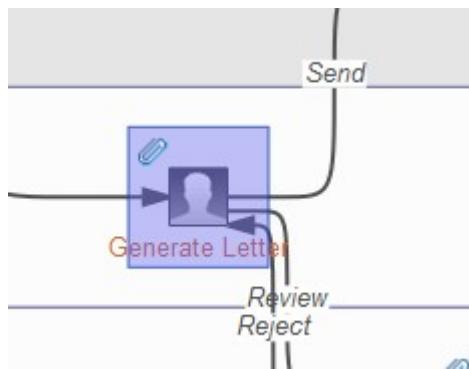
Click the **validate** button to validate the task.



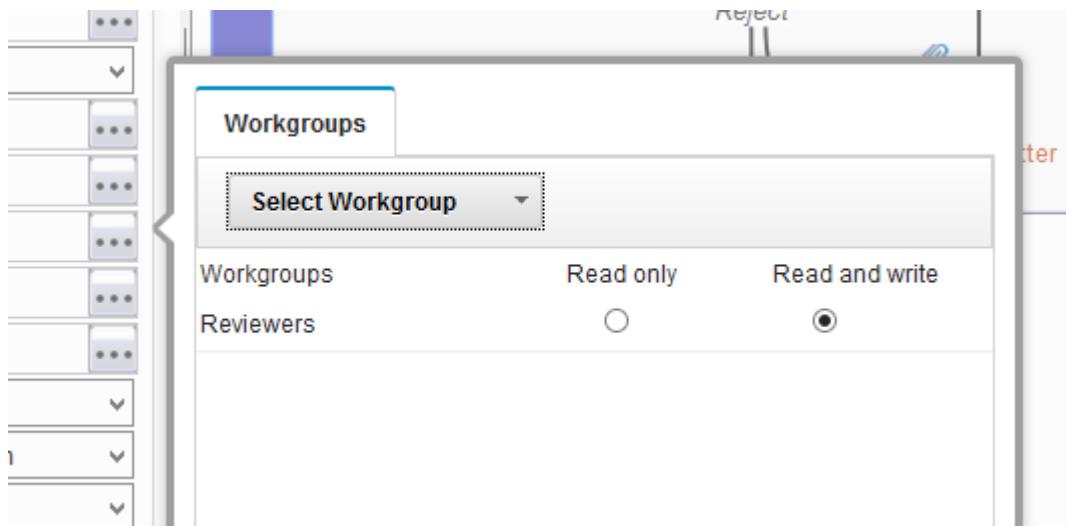
Click **Save**, but do not close the Step Desinger.



-
- 11 Click on the step Generate Letter.

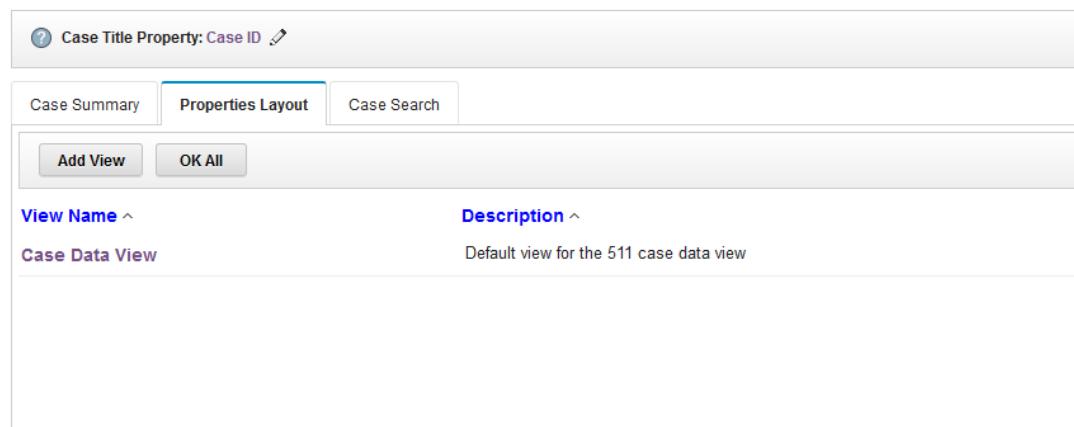


On the left side of the page in the Step Properties, expand on the Workgroups properties:

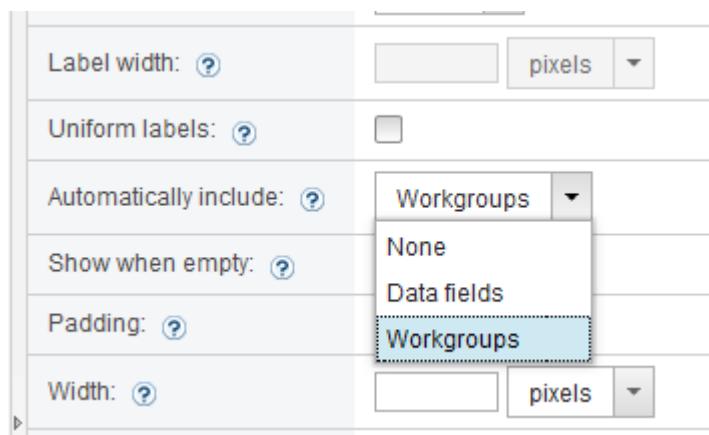


Notice that the Reviews workgroup has been selected. Cancel the Workgroups popup. Save and Close the Step Designer.

-
- 12 Click on the Views link, and click on the Properties tab. Click on the Case Data View properties view and open the Properties View Designer.



Highlight the Dispute Information Layout Container. On the right side of the page in the Settings, click on the Automatically include choice list and select workgroups :



Save and Close the Properties View Designer.

Click **Save and Close** to save and close the solution.

Congratulations. You have just performed a successful “round trip” from the step builder to the process designer and back to the step builder again.

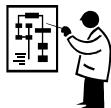
You could now **commit**, **deploy** and **test** your solution using the same mechanism you used earlier in this lab.

6.0 Create Your Own Solution (Optional)

At this point we encourage you to use Case Builder to perform the initial creation of a solution for a business problem that interests you. Later in the workshop, you will have time to further enhance this solution. Or, you can build a throwaway solution now, just to gain experience with Case Builder, and start a more elaborate one later.

We suggest the following as a minimum:

- Add a solution using the Wizard to guide you in the initial steps:
 - Name the Solution and provide the other basic information about it
 - Add one or two Case Types to the solution, each with one or two Tasks
 - Add at least one Document Type
 - Click on Finish and make sure the solution was created
- Edit the solution:
 - Add a few new Properties. Optionally define a Choice List for a property. You may also wish to try the “Reuse Property” option when adding a property; to do this you need to know the full name (unique identifier) of the property in the target object store for the project area, such as DocumentTitle (case sensitive).
 - Add an In-Basket
 - Edit one or more of the Case Types created earlier, and:
 - Add some properties to it and then add those to the Case Summary View
 - Create a Case Folder
 - Create a Task for the Case Type. You should add at least a Role Lane, a Step in that lane, and a connector between the LaunchStep and your new step.
- Validate, Save, Close, and Deploy the solution
 - If necessary, click on the **Refresh Solutions** button to see the green checkmark indicating that the deployment was successful.
- Test the solution (in Case Manager):
 - Add the P8Admin user to the role corresponding to the role lane you added in the task you created
 - Add a case and ensure that the case appears in the appropriate in-basket
 - Perform other actions appropriate to the solution definition



7.0 Step-by-Step – Creating Manual Tasks

Within any case management solution, there are tasks that a case worker may need to initiate that fall outside of the predefined case management flow. Within the IBM Case Manager, those tasks are modeled as **manual tasks**. Manual tasks may be declared as optional or required, where required tasks must be completed before the case can be closed. When viewing a case, the case worker can see the manual tasks that have been defined and can easily start one.

For this exercise, you will create three types of manual tasks using the Case Manager Builder. The first is a set of **mutually exclusive** manual tasks where the initiation of one of them automatically disables the other(s).

The second type of task we will create is called a **user-created** task. User-created tasks are always available and do not have any preconditions that must be met before they can be started.

The last will be a standard manual task for the generation of correspondence to be sent to the client.

As part of this exercise, you will also get a feel for how to use workgroups and document attachments within the Case Manager Builder environment.

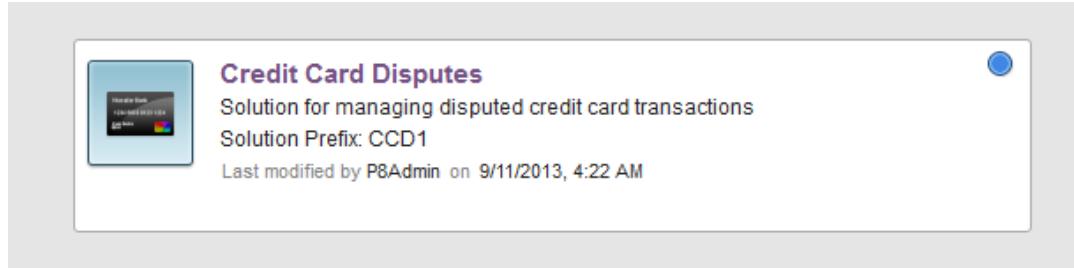
7.1 – Creating Mutually Exclusive Manual Tasks

For this exercise, you will create two manual tasks; when one is started by the user, the other disables automatically and cannot be started. To illustrate this feature, we are going to create two very simple, one-step tasks.

Note that for this series of exercises we will use the **Credit Card Disputes** solution, **not** the **Credit Card Disputes HOL** solution.

Step	Action
1	<p>Go back to Case Manager Builder (log on if necessary):</p> <p>Enter P8Admin for the user id</p> <p>Enter filenet for the password).</p> <p>You will be taken back to the Manage Solutions page.</p>

2



Move your mouse over the Credit Card Disputes solution and click the **Edit** link (or just click the solution name)

3 From your main **Credit Card Disputes** solution page, click the **Case Types** tab.

4

Click the **Manage Dispute** case type

5 We are going to start by adding one more property to our case type.

Click the **Properties** link on the left

Click the **Add Property** button

Select the **New** option

6

Enter **Transaction Amount** for the property name

Set the property's type to **Float**

Make the property **Required**

7



Click **OK** to create the new property

8

A screenshot of a dialog box titled 'Case Title Property: Case ID'. The 'Properties Layout' tab is selected. On the left, there's a list of 'Available Properties' including Name, Added On, Added by, Case Identifier, Case State, Case Type, Correspondence Type, Date Sent, and Modified On. On the right, under 'Properties in the Case Summary view', 'Customer ID', 'Due Date', and 'Transaction ID' are listed, while 'Transaction Amount' is highlighted with a yellow background.

Click the **Views** link and move the **Transaction Amount** property into the **Case Summary View**

9

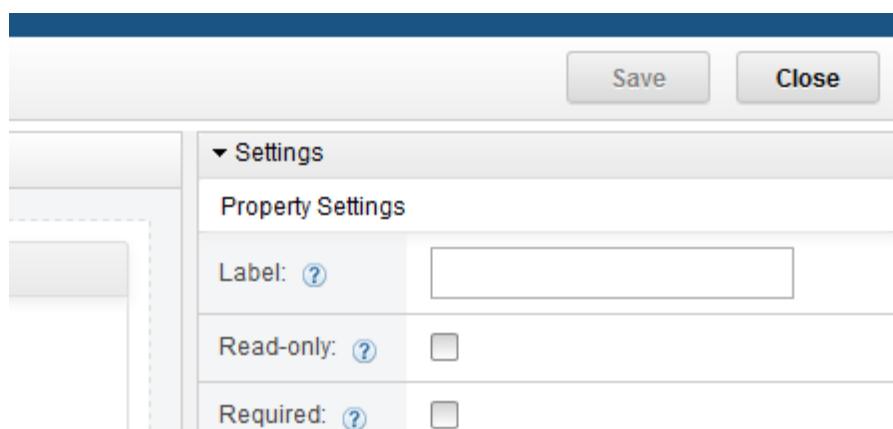
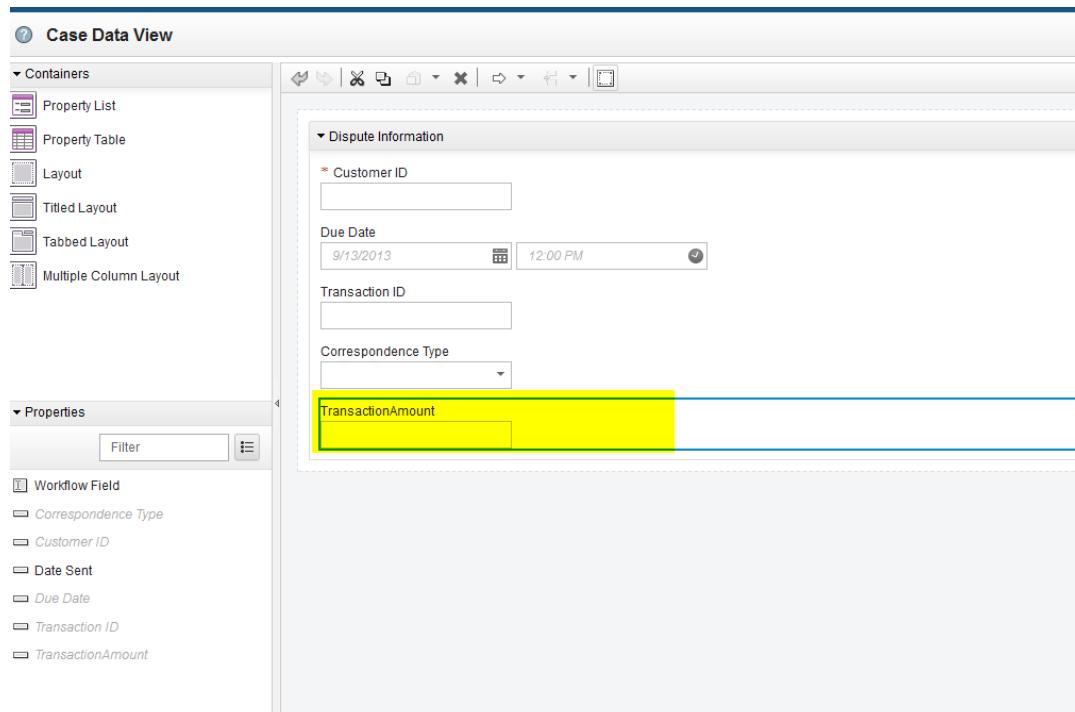
A screenshot of the same dialog box. The 'Properties Layout' tab is selected. Under 'View Name', 'Case Data View' is selected. Under 'Description', it says 'Default view for the 511 case data view'.

Click the **Properties Layout** tab

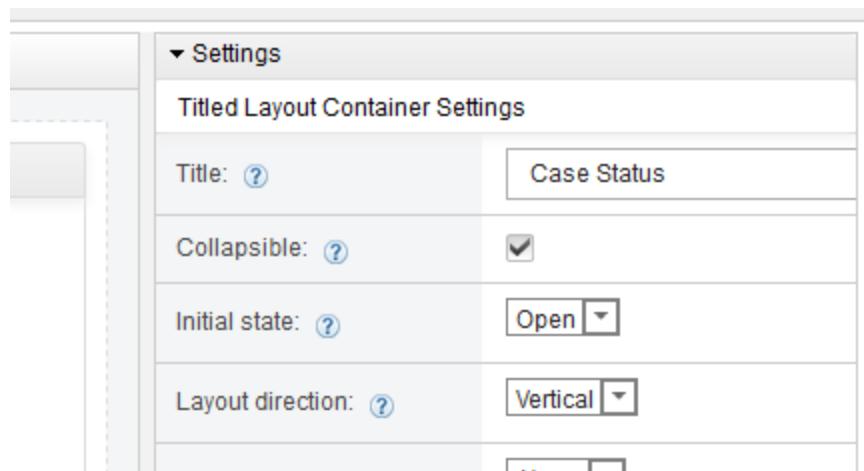
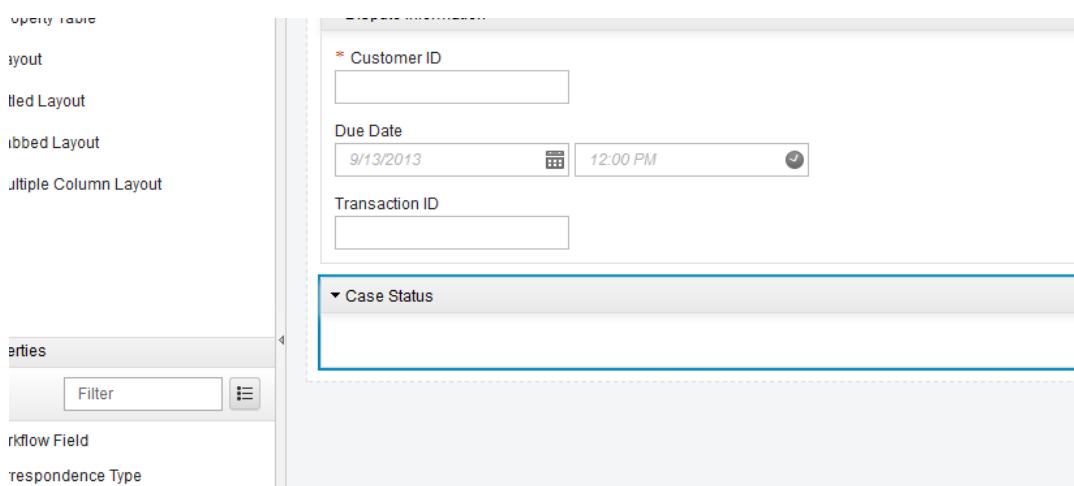
We will modify the default Case Data View. Click on the Case Data View to launch the Property Layout Designer.

Select the **Dispute Information** group name

Drag and drop the **Transaction Amount** property on the canvas and place it below the Correspondence Type as shown below. Click Save to save the changes made to the Case Data View.

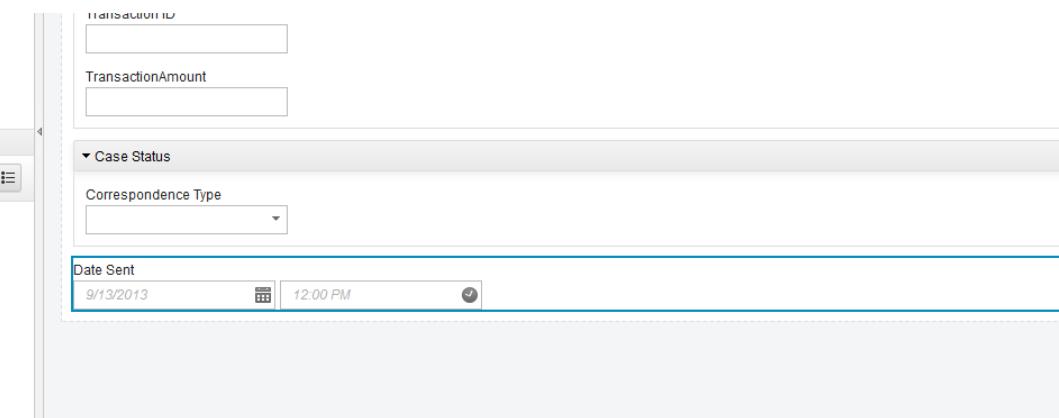


-
- 10** Drag and Drop another Titled Group container to the canvas below the Dispute Information as shown below:

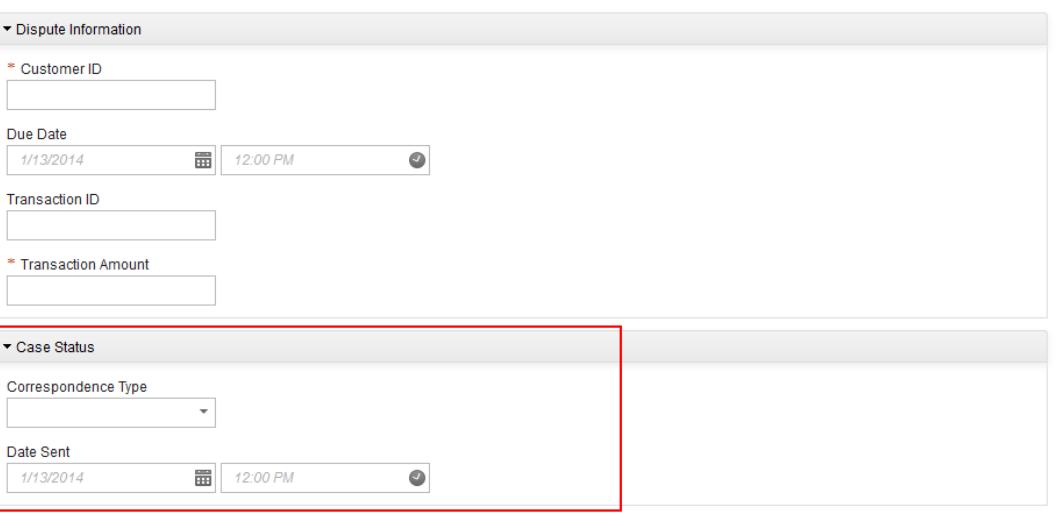


If necessary copy and Paste Inside the new Titled Group container.

-
- 11** Set the properties of the layout by entering the Title as Case Status. Drag and Drop the Correspondence Type property from the Dispute Information container to the Case Status container. Add the remaining property (Date Sent) to the Case Status container:



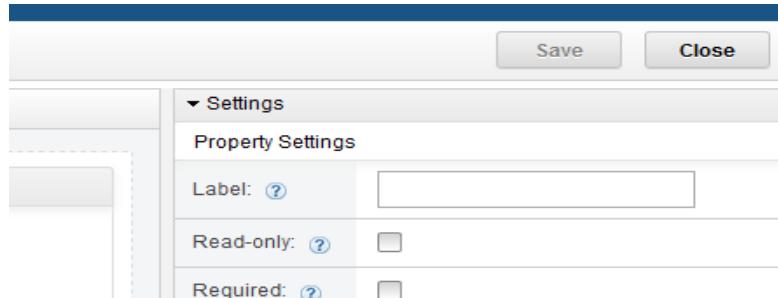
The screenshot shows a layout configuration interface. On the left is a tree view with nodes like 'Dispute Information' and 'Case Status'. The main area contains several input fields. Under 'Dispute Information', there are fields for 'Customer ID' (text box), 'Due Date' (date and time picker set to 1/13/2013 at 12:00 PM), 'Transaction ID' (text box), and 'Transaction Amount' (text box). Under 'Case Status', there is a 'Correspondence Type' dropdown and a 'Date Sent' date and time picker set to 9/13/2013 at 12:00 PM. A blue border highlights the 'Case Status' section.

12 

The screenshot shows the Case Data View. It has a header 'Dispute Information' with fields for Customer ID, Due Date (1/13/2014 at 12:00 PM), Transaction ID, and Transaction Amount. Below this is a section titled 'Case Status' with a red border around it. Inside this section are a 'Correspondence Type' dropdown and a 'Date Sent' date and time picker set to 1/13/2014 at 12:00 PM.

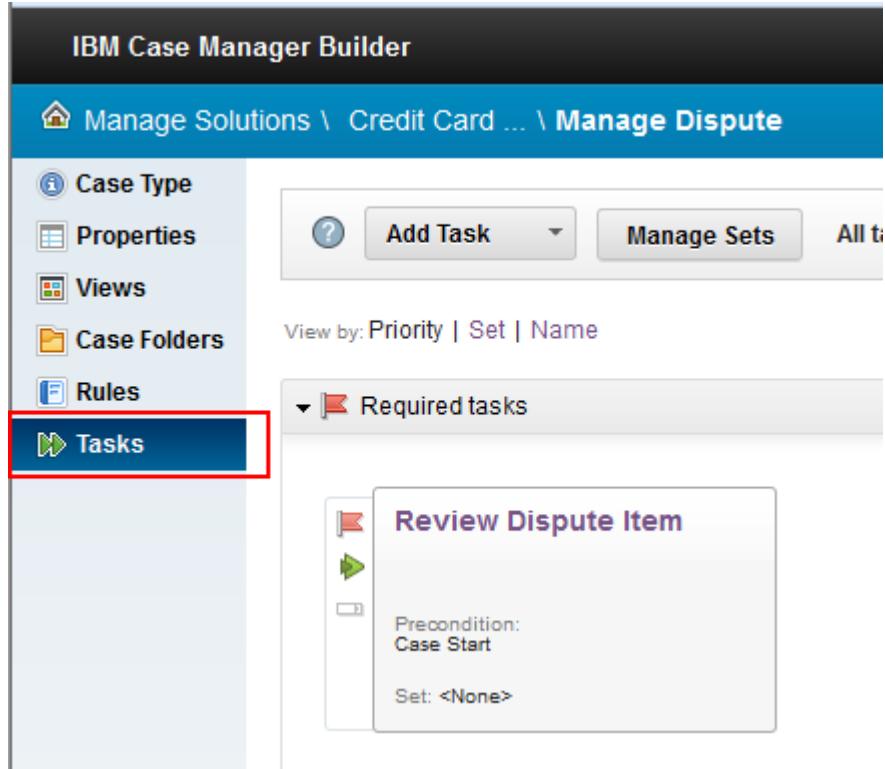
The new layout will look as shown above.

-
- 13** Click the **Save** button, the **Close** button, to save and close the Case Data View



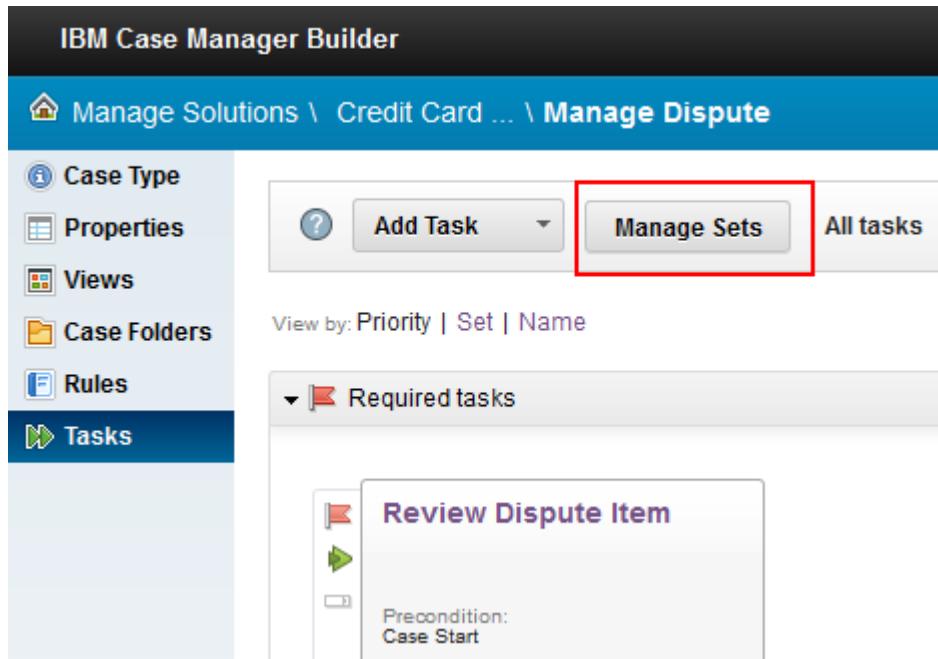
The screenshot shows the Case Data View with a 'Settings' section on the right. It includes 'Property Settings' with fields for 'Label' (with a question mark icon), 'Read-only' (checkbox), and 'Required' (checkbox). At the top right are 'Save' and 'Close' buttons.

14 Now let's create the actual tasks.



Click the **Tasks** link on the left

15



Click the **Manage Sets** button

16



A **Set** is a way to group related tasks. The options to make a group of tasks **Mutually Exclusive** (only one can be done) or **All-inclusive** (all must be completed if any is started) are applied to the Set.

Individual tasks that you create can then be associated with a particular Set.

17

A screenshot of a Windows-style dialog box titled "Manage Sets".

- At the top left is a "Add Set" button, labeled with a red number "1".
- Below it is a text input field for the set name, containing "Audit", labeled with a red number "2".
- To the right of the name input is a larger text area for "A description of the set".
- Underneath the name input is a "Type:" label followed by two radio button options:
 - "An all-inclusive set" (unchecked)
 - "A mutually exclusive set" (checked)
- On the right side of the dialog are "OK" and "Cancel" buttons, labeled with a red number "4".
- At the bottom left are "OK" and "Cancel" buttons again, labeled with a red number "5".

Click the **Add Set** (1) button

Enter **Audit** (2) as the set name

Click the **radio button** (3) to set the type to **A mutually exclusive set**

Click the **OK** (4) button to commit the new set

Click the **OK** (5) to close the Manage Sets dialog box

18

A screenshot of a software interface showing a vertical sidebar with a blue header bar. On the right side, there is a dropdown menu titled "All tasks" with the following options:

- "Add Task" (dropdown arrow)
- "Manage Sets" (button)
- A separator line
- "Task" (selected item, highlighted with a red border)
- "Container task"
- "Task with FileNet BPM process"
- A separator line
- "Required tasks"

Click the **Add Task** dropdown, then **Task**, to create the first task in our mutually exclusive group

19

Add a task

General	Preconditions	Task Properties	Design Comment
* Name: Client Audit			
* Unique Identifier: CCD1_ClientAudit			
Description: Optional Client Audit task			
This task starts: <input type="radio"/> Automatically <input checked="" type="radio"/> Manually <input type="radio"/> Discretionally			
This task is: <input type="checkbox"/> Hidden <input type="checkbox"/> Required <input type="checkbox"/> Automatically completed when the case completes			
Assign to set: Audit <input type="button" value="▼"/> <input type="button" value="Manage Sets"/>			
<input type="button" value="OK"/> <input type="button" value="Cancel"/>			

Enter **Client Audit** for the task's name

20 Give the task a description – **Optional Client Audit Task**

21 Select the **Task Starts: Manually** option

A manual task will start when the user decides to do so.

22 This task does not need to be required

23 Click the **Assign to set** dropdown and choose the **Audit** set you just created.

24

Add a task

General Preconditions Task Properties Design Comment

What preconditions must be met for this task to start?

A property condition is met

Add Condition | Delete All Conditions

Property	Operator	Value
Transaction Amount	is greater than	5000

OK Cancel

Click the **Preconditions** tab

Select the **A property condition is met**

Click the **Add Condition** button

Select **Transaction Amount** as the property

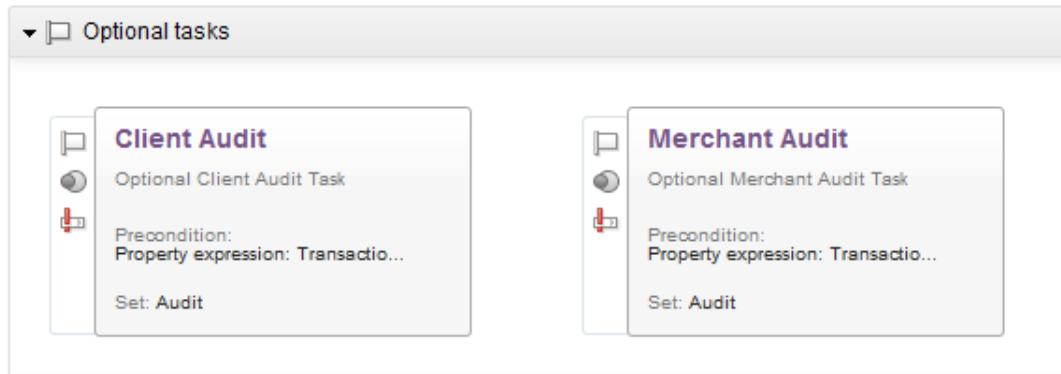
Set the Operator to **is greater than or equal to**

Set the Value to **5000**

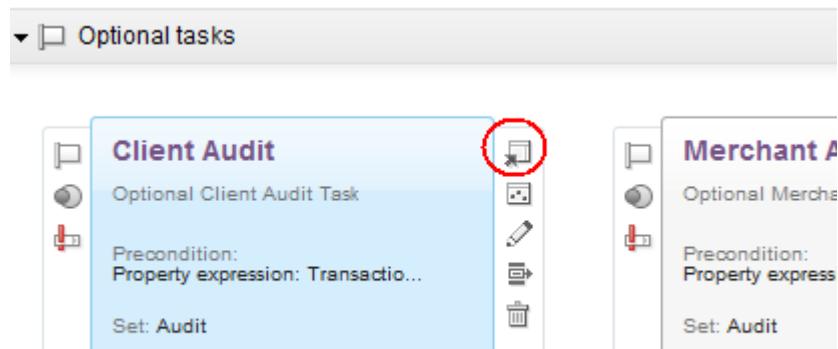
25

Click the **OK** button

26 Repeat steps 18 – 25 but replace the word Client with Merchant



27

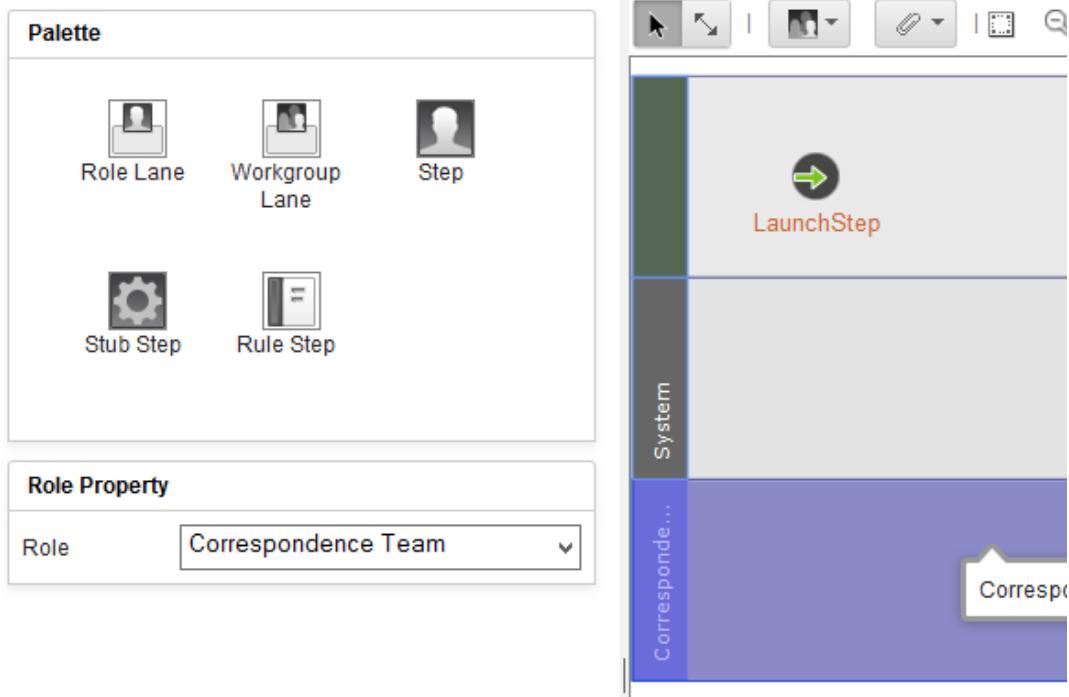


Move your mouse over the **Client Audit** task and click the **Open Step Editor** icon

28

Step Designer

Client Audit

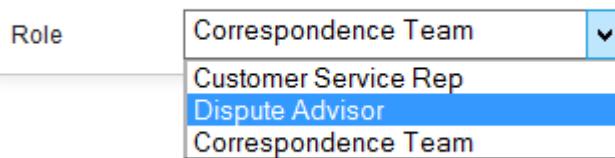


Drag the **Role Lane** icon onto a blank area of the canvas.

Click on the new swimlane (**Correspondence Team**)

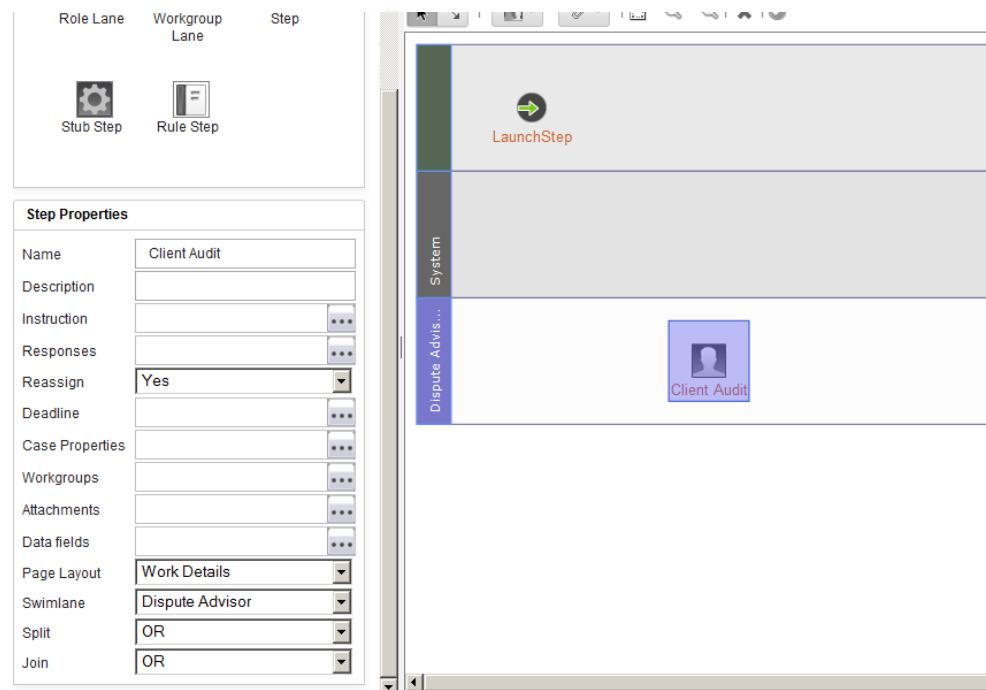
29

Role Property



From the **Role** dropdown on the left, set the role to **Dispute Advisor**

30

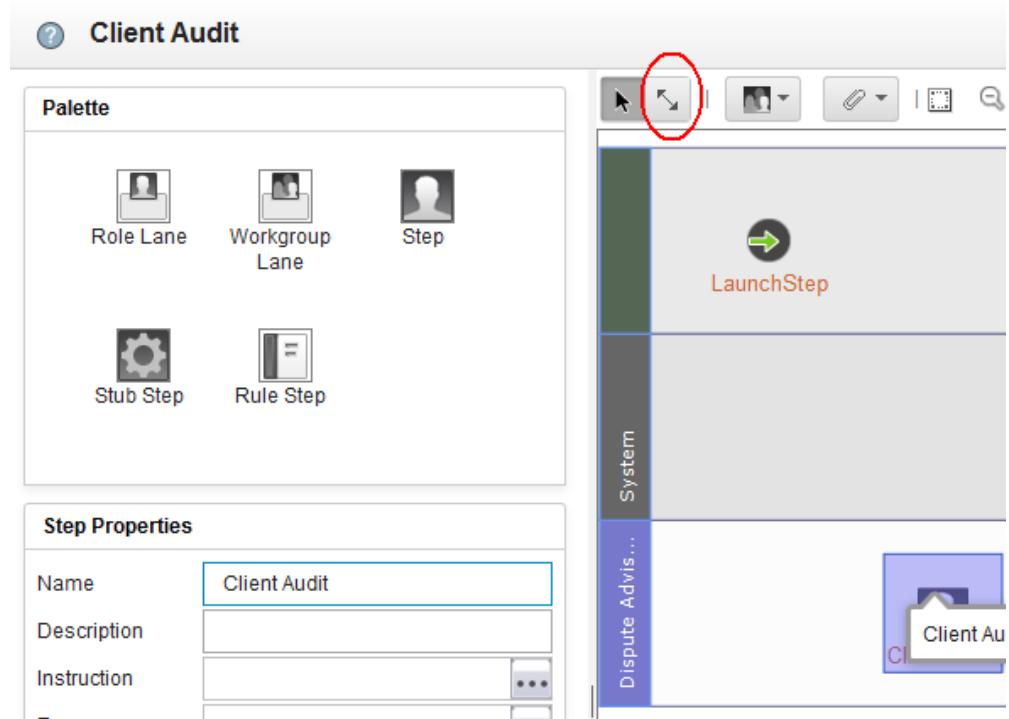


Drag a new step onto the **Dispute Advisor** swimlane.

Select the new step

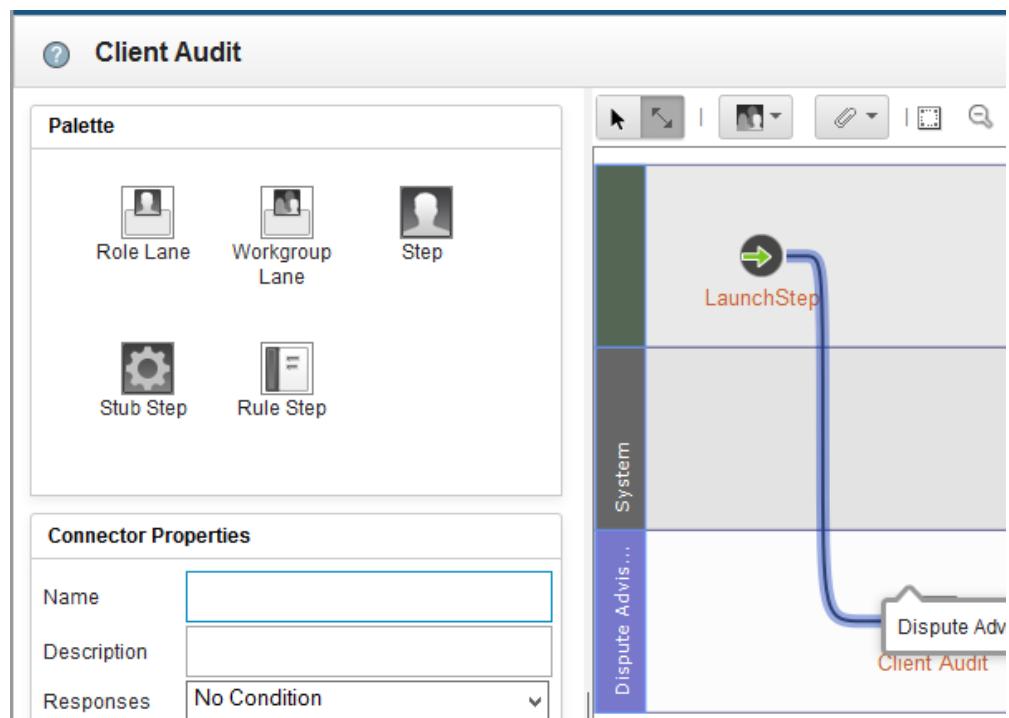
In the Step Properties dialog, enter **Client Audit** as the step name

31



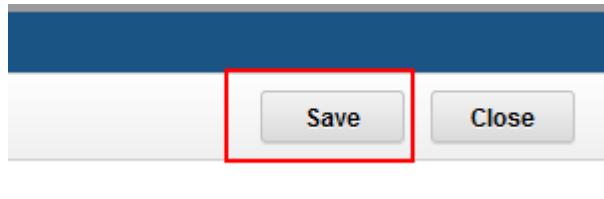
Click the Connector icon

32



Click on the **Launch Step** and drag the connector onto the **Client Audit** step

33



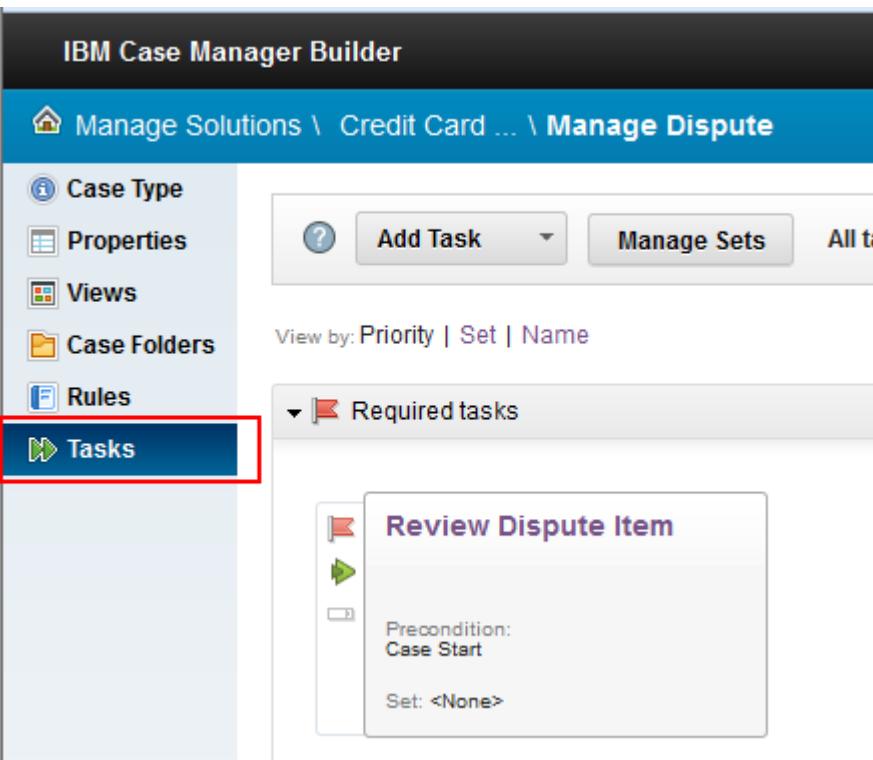
Click **Save** in the upper right hand corner to save your step definition

Click **Close** to exit the step editor

34 Repeat steps 27 – 33 for the **Merchant Audit** task, making the appropriate changes from **Client** to **Merchant**

7.2 – Creating a Discretionary Manual Task

For this exercise, you will create a new **Discretionary manual task** that allows the case worker to ask a co-worker for an opinion on a case.

Step	Action
1	 The screenshot shows the IBM Case Manager Builder interface. On the left, there is a vertical navigation bar with options: Case Type, Properties, Views, Case Folders, Rules, and Tasks. The 'Tasks' option is highlighted with a red box. The main workspace displays a task named 'Review Dispute Item' with a green checkmark icon. The task details show a precondition of 'Case Start' and a set of '<None>'. At the top right, there is a toolbar with a question mark icon, an 'Add Task' dropdown, a 'Manage Sets' button, and a 'All t...' button. Below the toolbar, there is a 'View by: Priority Set Name' dropdown and a section titled 'Required tasks' with a red flag icon.

Make sure the **Tasks** item from the panel on the left is selected

- 2 This will display all the tasks that have been defined for this case type. To this point, there is one required and two optional tasks. We are going to add one more optional task.
-

3

Click the **Add Task** dropdown, then **Task**

- 4 Enter the values below for the new task:
-

Add a task

<input checked="" type="radio"/> General	<input type="radio"/> Design Comment
*Name: Case Review Request	
*Unique Identifier CCD1_ CaseReviewRequest	
Description: Request a review of case material	
This task starts: <input type="radio"/> Automatically <input type="radio"/> Manually <input checked="" type="radio"/> Discretionally	
This task is: <input type="checkbox"/> Hidden <input checked="" type="checkbox"/> Required	
Assign to set: <None> <input type="button" value="▼"/> <input type="button" value="Manage Sets"/>	
<hr/> <hr/> <hr/>	
<input type="button" value="OK"/>	<input type="button" value="Cancel"/>

Name : **Case Review Request**

Description: **Request a review of case material**

Task starts: **Discretionally**

(Not Required)

- 5 Click **OK** to create the new task
-

Now you will create the task flow.

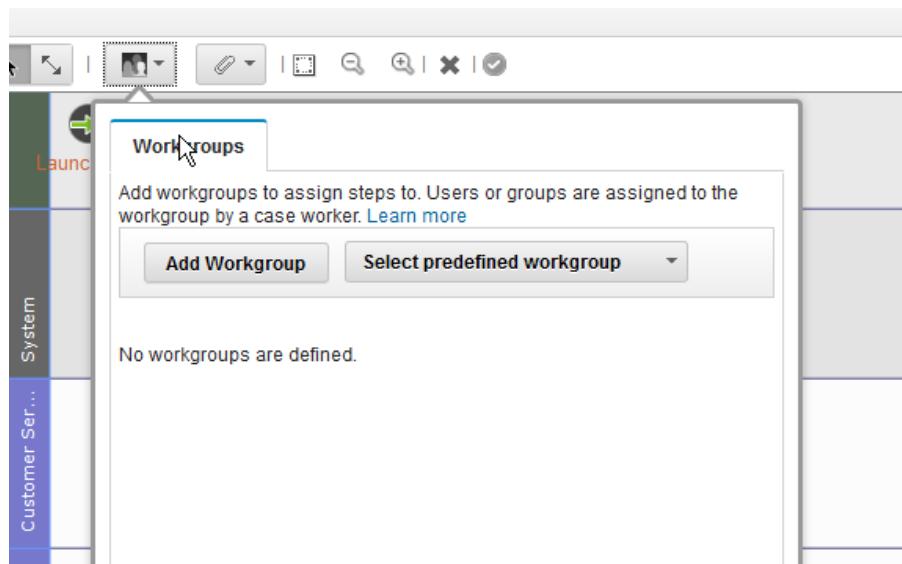
Step Action

1

Hover over the **Case Review Request** task to reveal the **Step Editor** icon on the right side

2 Click on the **Step Editor** icon to open the editor

3



Click on the **Manage Workgroups** button at the top of the editor

4 Click the **Add Workgroup** button

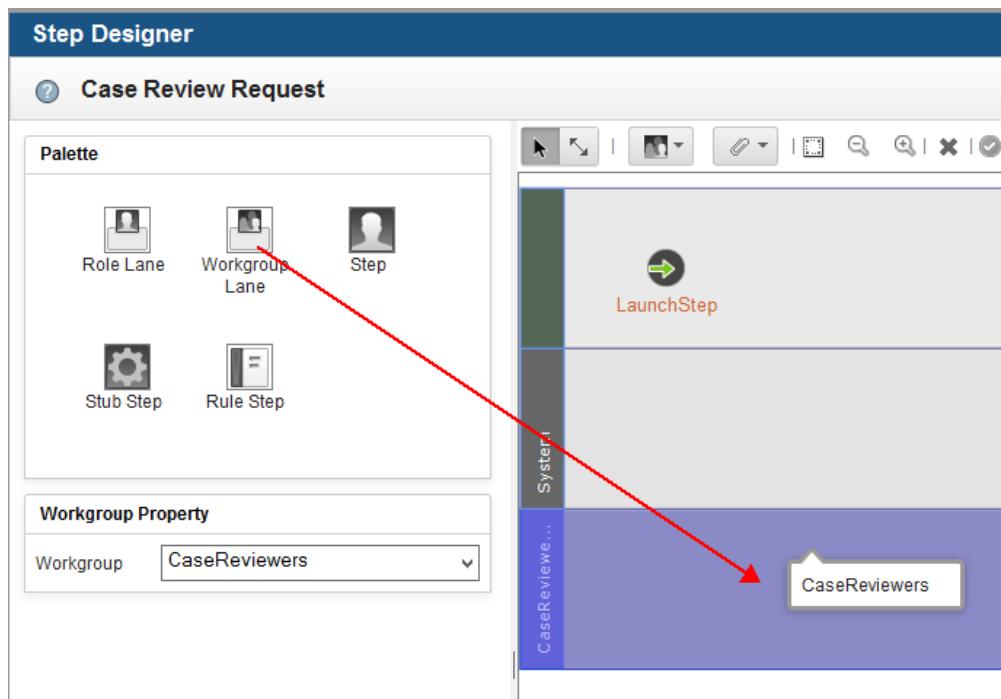
Enter **CaseReviewers** (no space) as the workgroup name

Use **Enter Reviewers** as the prompt

5 Click the **OK** button to add the new workgroup

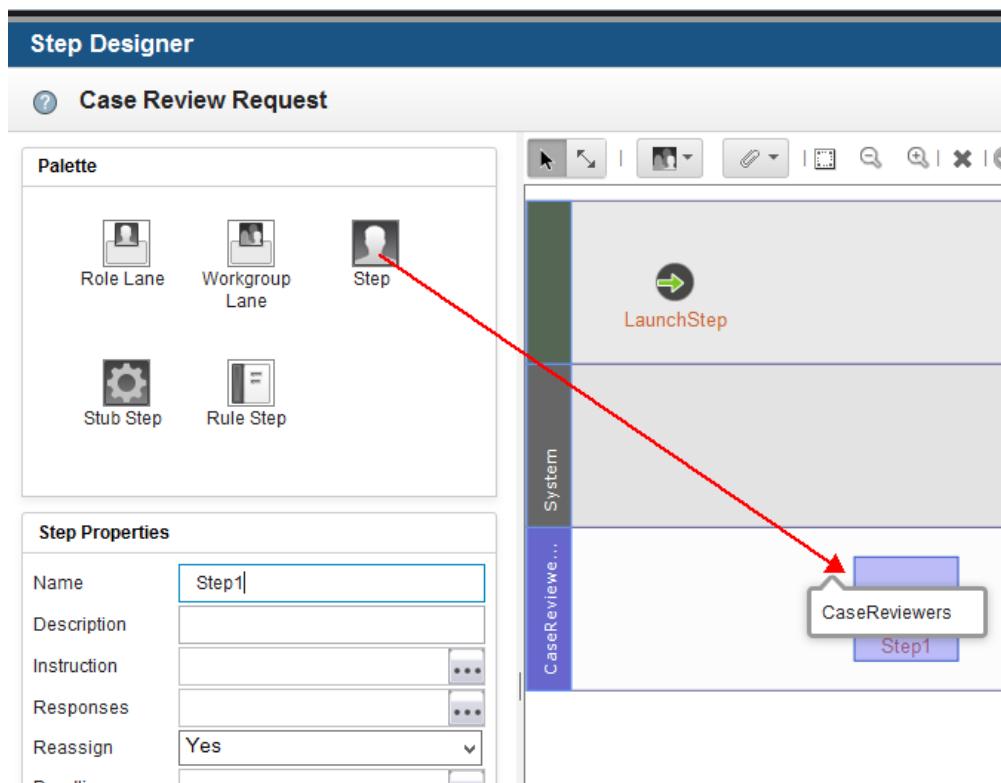
6 Click the **Close** button to close the Manage Workgroups panel

7



Drag and drop the **Workgroup Lane** icon onto an empty area of the canvas to create a swimlane for the **Case Reviewers**

8



Drag and drop the **Step** icon onto the **CaseReviewers'** swimlane

Click on the new step, and in the **Step Properties**, set the step name to **Review**

9

Select the LaunchStep icon

10

The screenshot shows the "Open Step Properties" dialog box for a "LaunchStep" task. In the "Workgroups" field, there is an edit button (three dots) which is circled in red. A modal dialog box titled "Select Workgroup" is displayed over the main window. This dialog has a dropdown menu "Select Workgroup", a "Name:" filter input with "CaseReviewers" typed in, and two buttons "OK" and "Cancel". The "OK" button is highlighted with a red oval.

In the **Open Step Properties** area, click on the Edit icon to the right of **Workgroups**

Click **Select Workgroup**

Click the **CaseReviewers** workgroup

Click the **OK** button

11

The screenshot shows a "Workgroups" property sheet. It has a "Select Workgroup" dropdown. Below it, a table lists "CaseReviewers" with two columns: "Read only" (radio button) and "Read and write" (radio button, which is selected and highlighted with a blue oval). There is also a "Workgroups" column with a radio button next to it.

Leave it set to **Read and write**

12

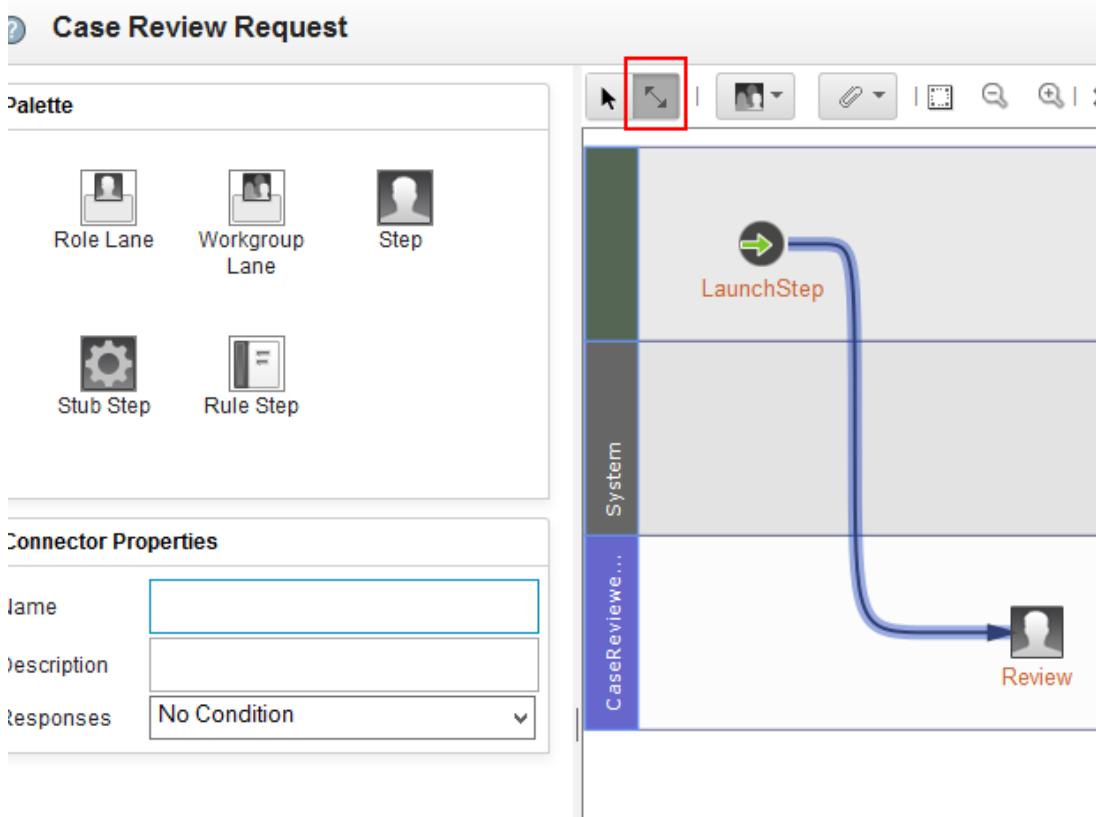
Click **OK** to close the property sheet

13

Click on Case Properties for the LaunchStep task and then click the Select Property down box.

14 Click the Select All button and then click on the OK button. This will select all of the case properties to include in the Add Task page.

15 Click the OK button again to save and exit.

16 

Click the **Connector icon** in the palette

Click on the **Launch Step** and drag onto the **Review** step to add a connector between them

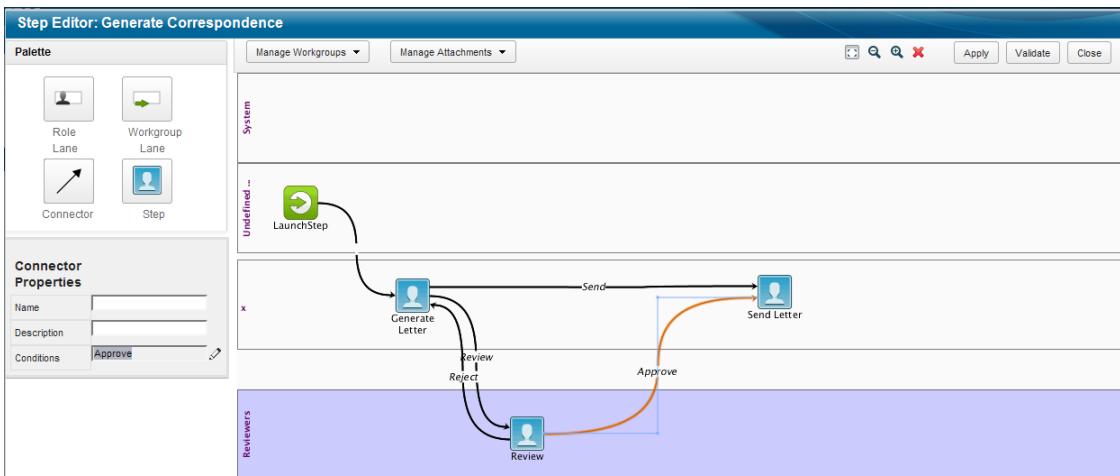
17 Click **Save** in the upper right hand corner to save your step definition

Click **Close** to exit the step editor

18 Click Save to **Save** your changes to the solution so far.

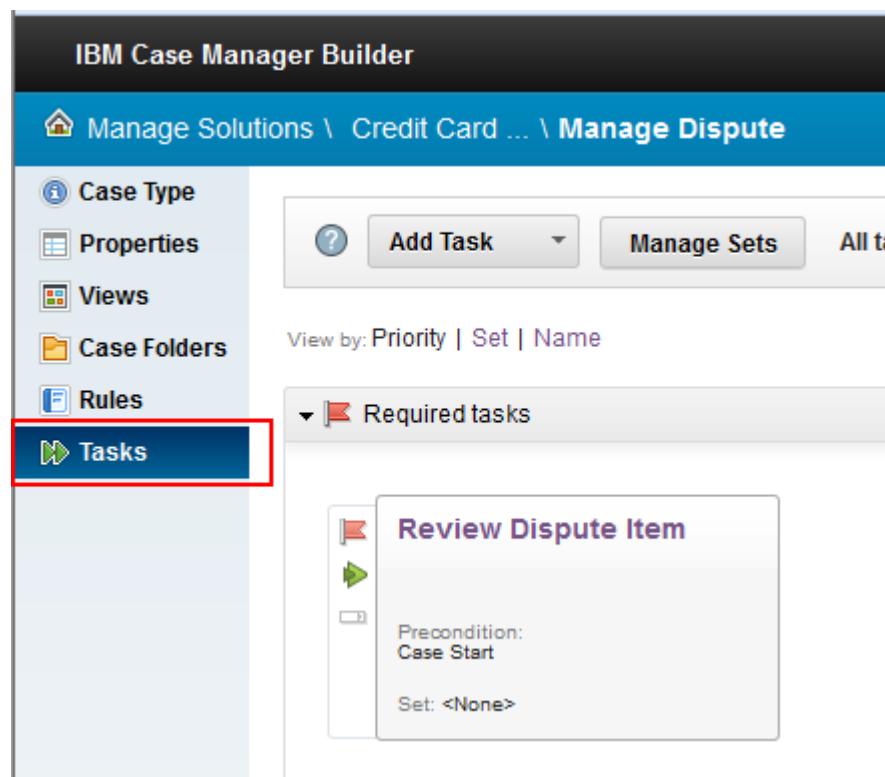
7.3 – Creating a Standard Manual Task

For this exercise, you will create a new **manual task** that allows the case worker to request that a letter be sent to the customer. This task will be performed by the correspondence team, working with other groups in the organization as necessary. When completed, the task flow will look like this:



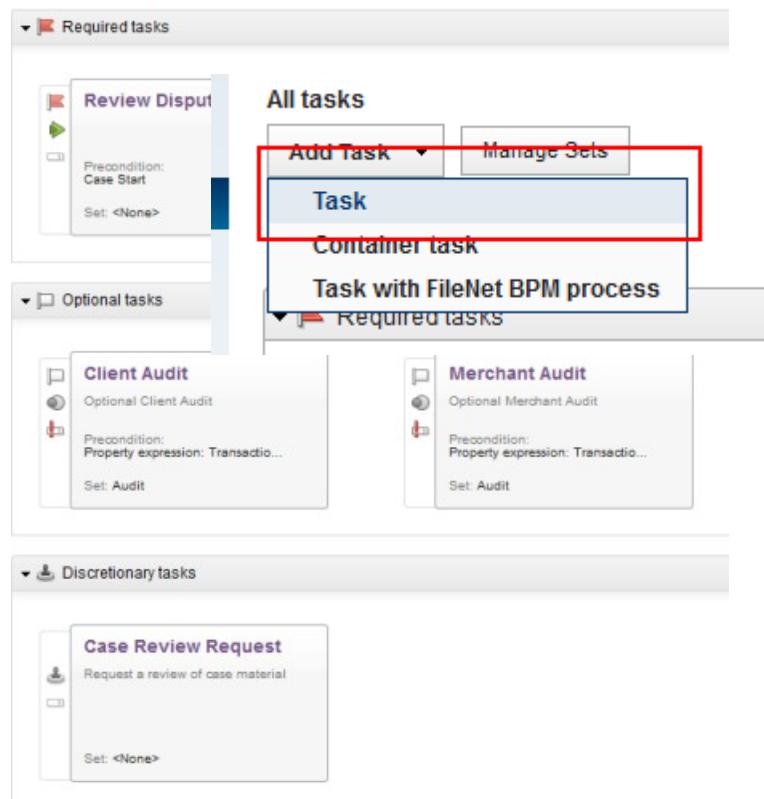
This task will require the creation of another **workgroup** whose members will act as reviewers of the generated letter. You will also add an **attachment** placeholder to this flow which will be populated at runtime by the letter being created as part of the process.

Step Action

1

Make sure the **Tasks** item from the panel on the left is selected

- 2** This will display all the tasks that have been defined for this case type. To this point, there is one required, two optional, and one Discretionary task. We are going to add one more optional task.
-



3

Click the **Add Task** dropdown, then **Task**

4 Enter the values below for the new task:

Add a task

General Preconditions Design Comment

*Name: **Generate Correspondence** 1

*Unique Identifier: **CCD1_ GenerateCorrespondence**

Description: **This task is to generate the correspondence** 2

This task starts: Automatically Manually Discretionally

This task is: 3

Hidden
 Required

Assign to set: **<None>** **Manage Sets**

OK **Cancel**

Name (1): **Generate Correspondence**

Description (2): **This task is to generate the correspondence**

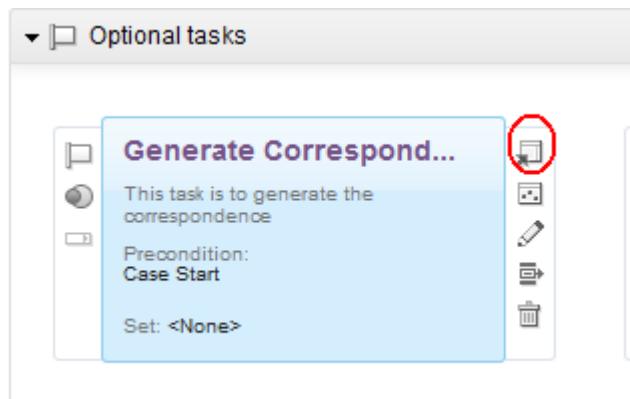
Task starts (3): **Manually**

Do not select **Required**

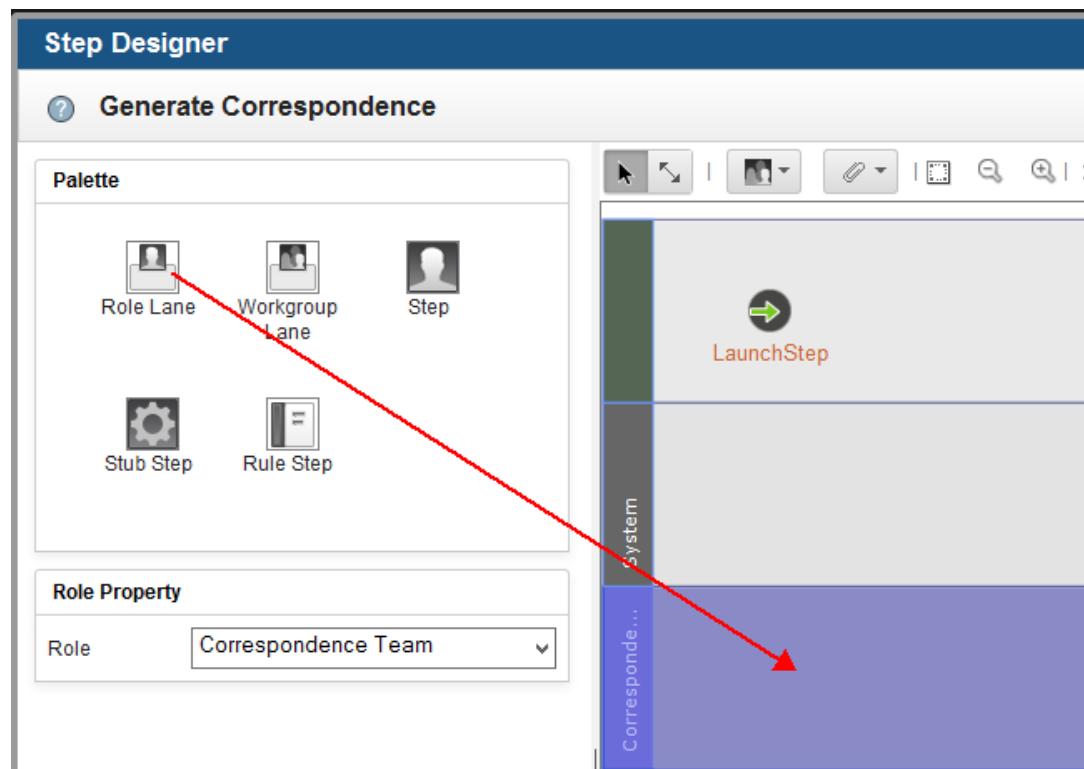
5 Click **OK** to create the new task

Now you will create the task steps.

Step Action

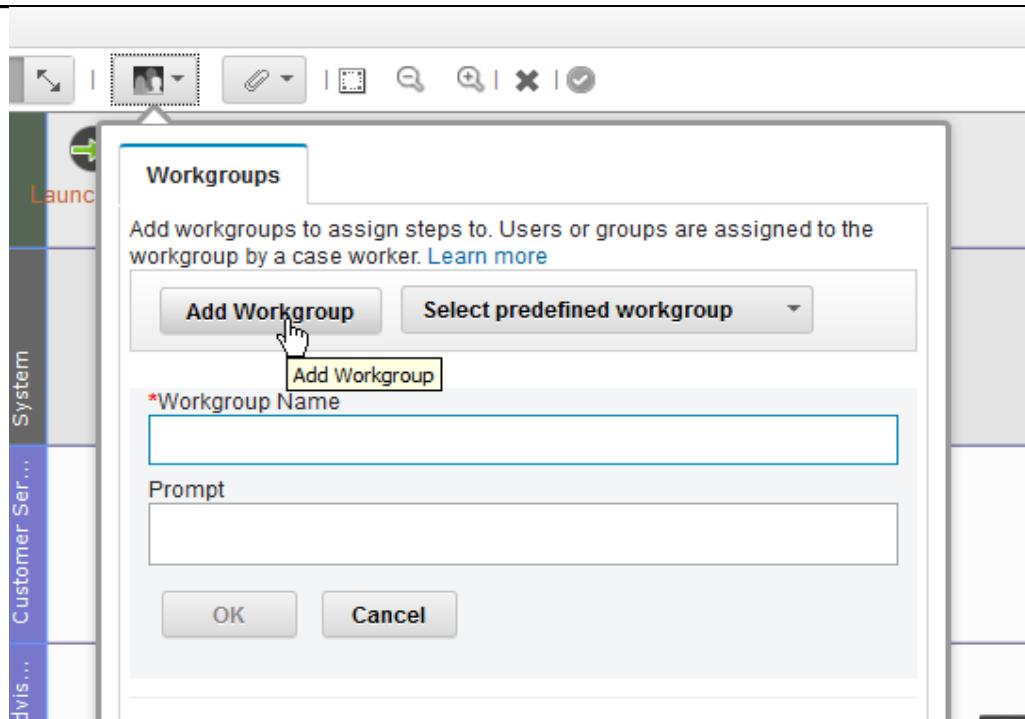
1

Hover over the **Generate Correspondence** task to reveal the **Step Editor** icon on the right side

2 Click on the **Step Editor** icon to open the editor**3**

Drag and drop **Role Lane** onto the canvas to create a swimlane for the **Correspondence Team**

If the **Correspondence Team** is not already assigned to the swimlane, click on the swimlane and use the **Role Property panel** on the left to set it.

4

Click on the **Manage Workgroups** icon at the top of the editor

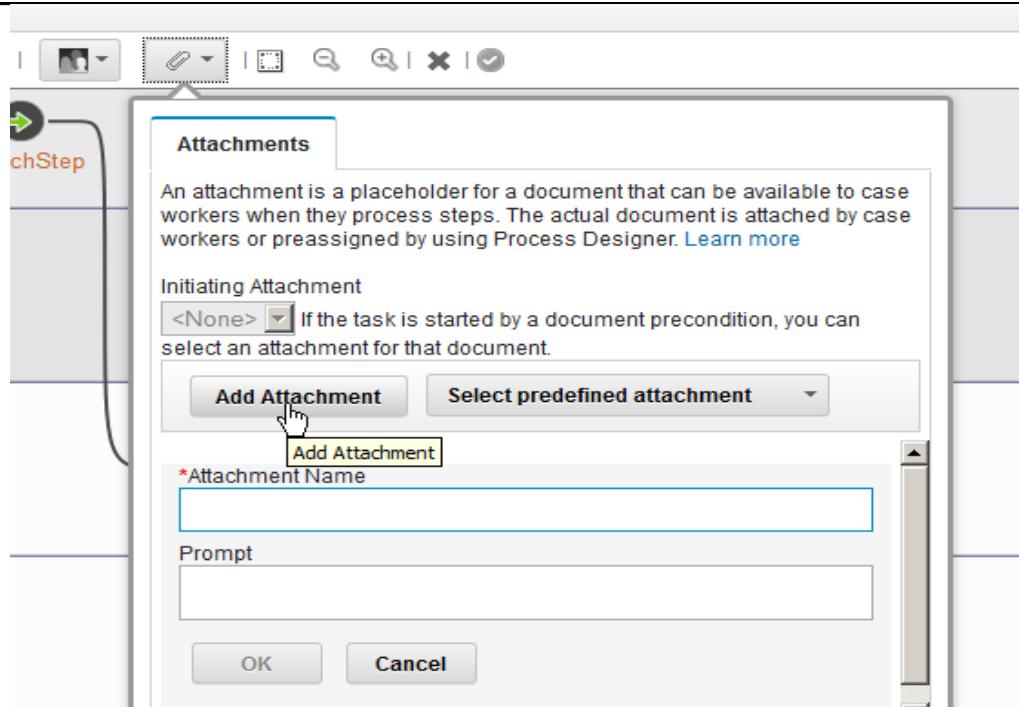
5 Click the **Add Workgroup** button

Enter **Reviewers** as the workgroup name

Use **Enter Reviewers** as the prompt

6 Click the **OK** button to add the new workgroup

7 Click the **Close** button to close the Manage Workgroups panel

8

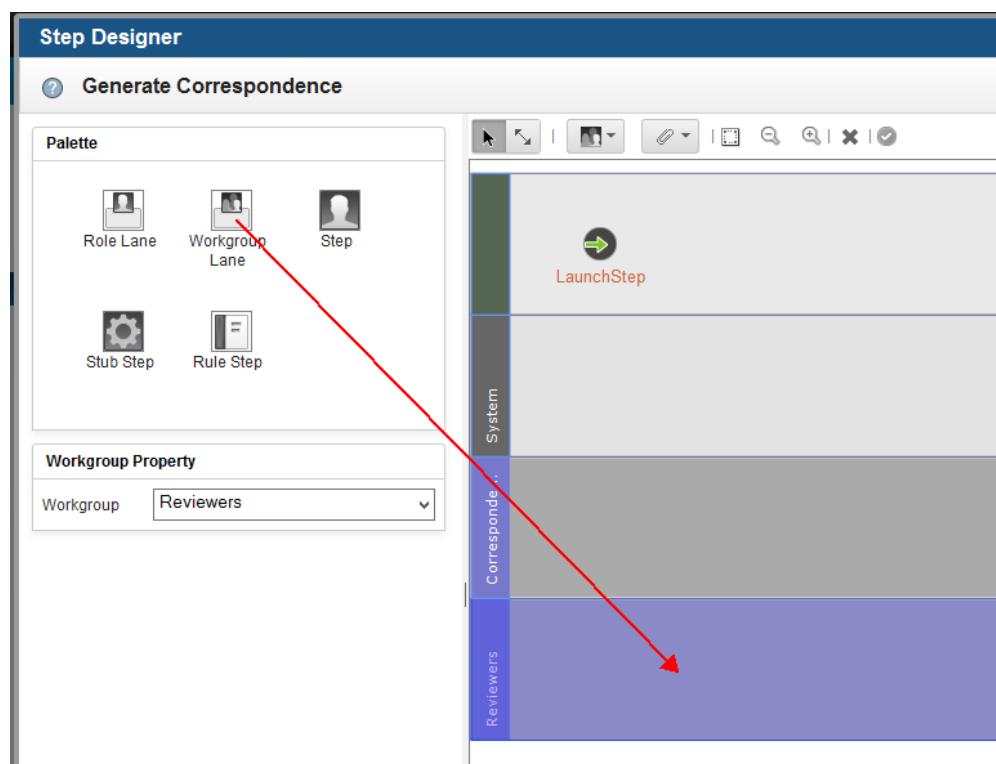
Click on the **Manage Attachments** button at the top of the editor

- 9** Click the **Add Attachment** button
- Enter **Letter** as the Attachment Name
- You do not need to enter a Prompt value

- 10** Click **OK** to add the attachment placeholder

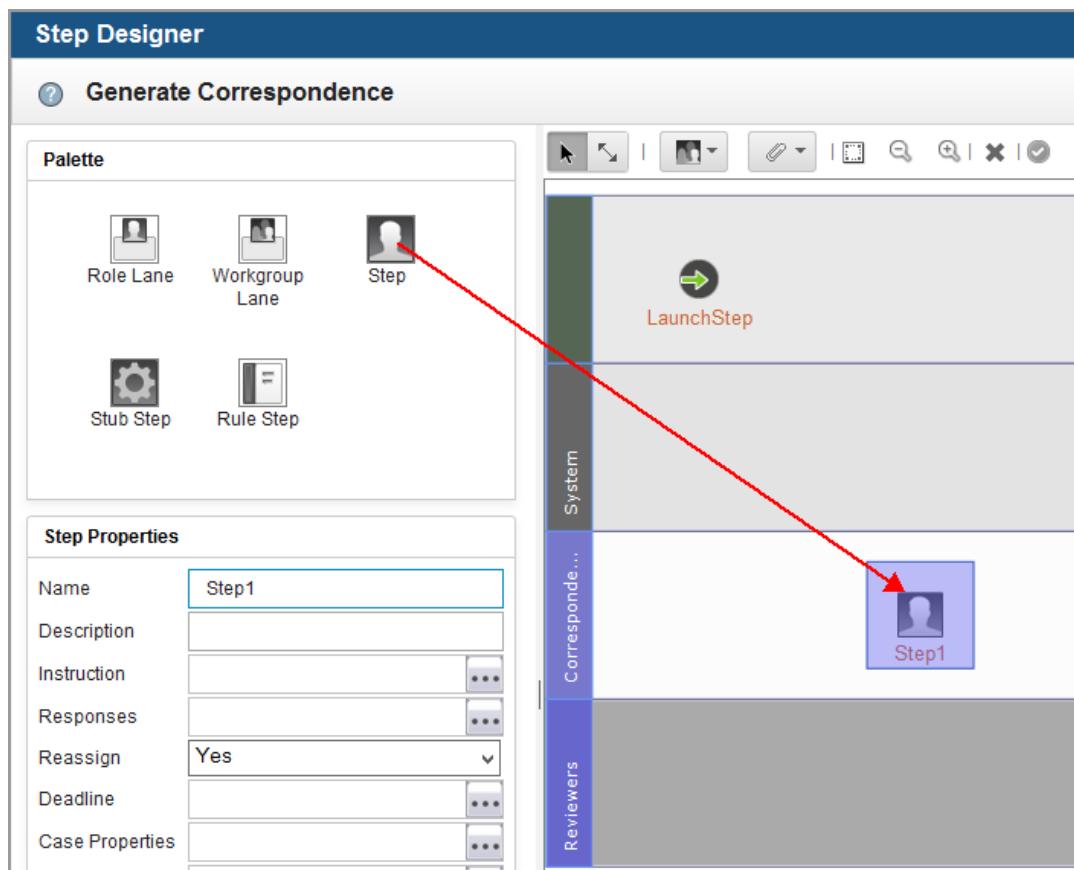
- 11** Click the **Close** button to close the Manage Attachments panel

12



Drag and drop **Workgroup Lane** to the canvas below the Correspondence Team swimlane to create a new workgroup swimlane and assign it to the **Reviewers** workgroup

If the **Reviewers** workgroup is not already assigned to the swimlane, use the **Workgroup Property** panel on the left to set it.

13

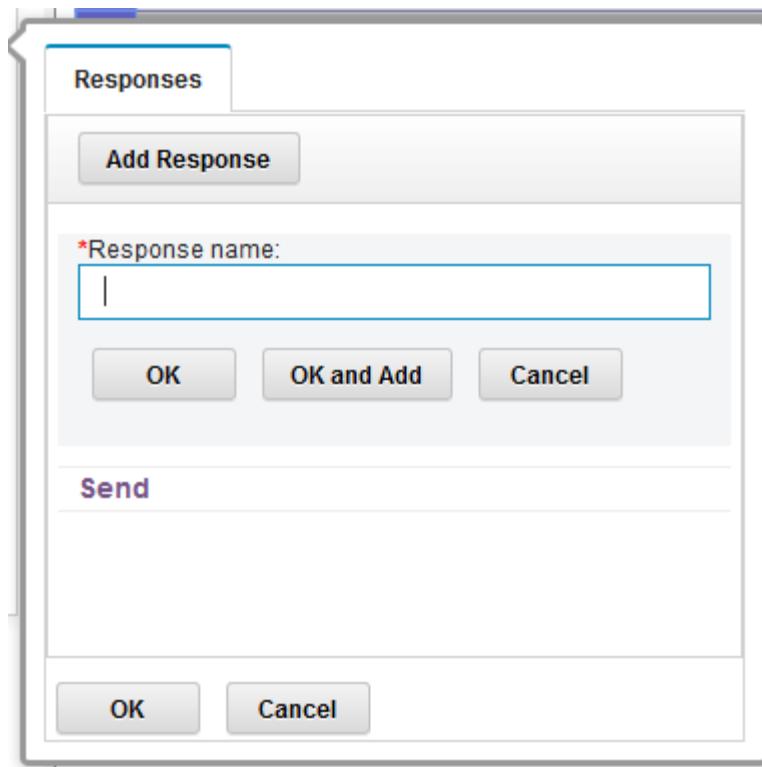
Drag and drop **Step** onto the **Correspondence Team** swimlane

14 Click on the new step. Then, using the Step Properties panel on the left, name the step **Generate Letter**

15 Responses

In the Step Properties panel, click on the Edit icon to the right of **Responses**

16



Click the **Add Response** button and enter **Send** as the first response

Click **OK and Add** below the Response Name to enter your value

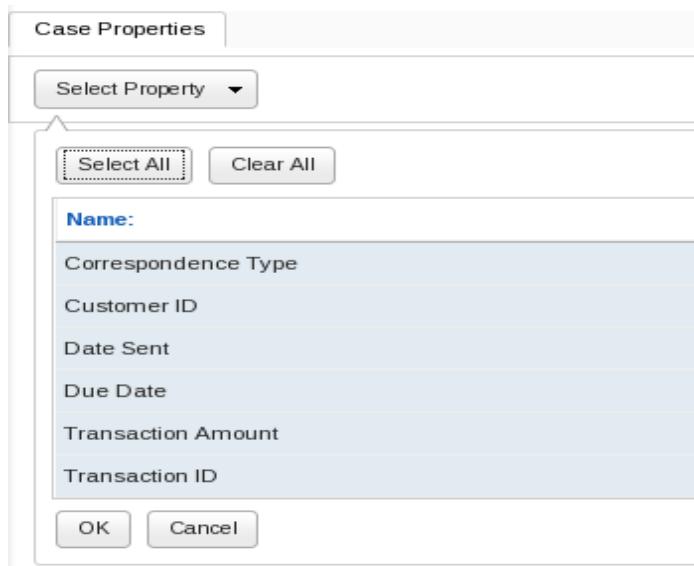
Enter **Review** as the other response

Click **OK** below the Response Name to enter your value

17 Click to save the changes and close the **Responses** panel

18 Case Properties 

In the Step Properties area, click on the Edit icon to the right of **Case Properties**.

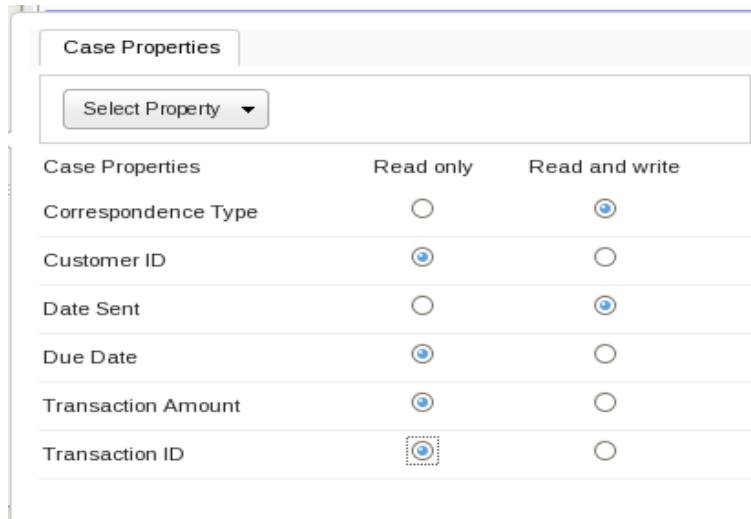
19

Click the **Select Property** button

Click the **Select all** button

Click **OK** to add the properties as parameters

20



Leave **Correspondence Type** and **Date Sent** as **Read and write** and change the others to be **Read only**

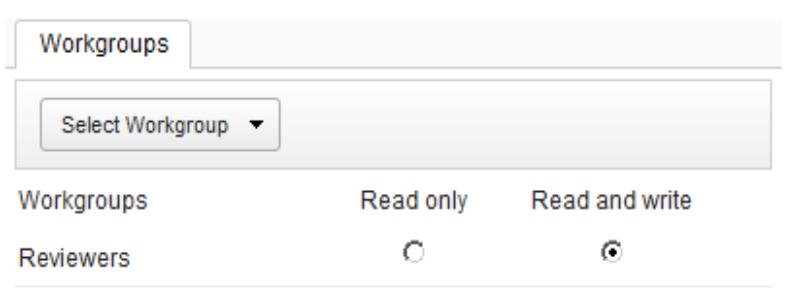
Click **OK** to save the case properties

21 In the Step Properties area, click on the Edit icon to the right of **Workgroups**

22 Click the **Select Workgroup** button

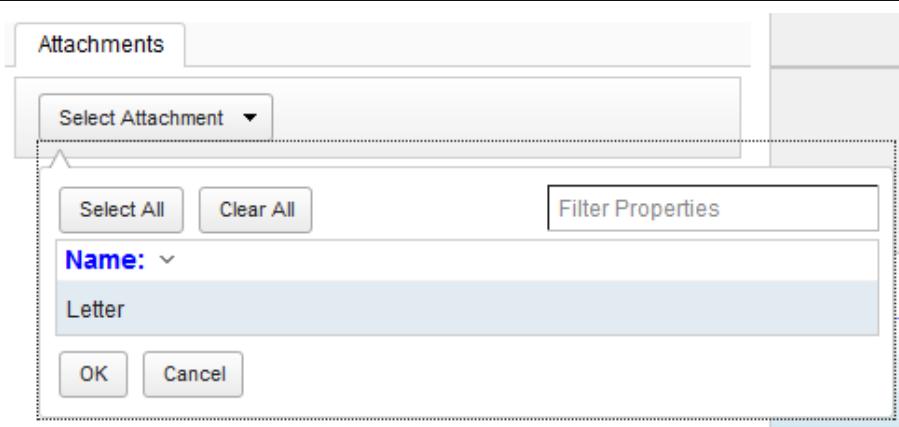
Click the **Reviewers** workgroup

Click the **OK** button

23

Leave it set to **Read and write**

Click the **OK** button to close the Workgroups panel

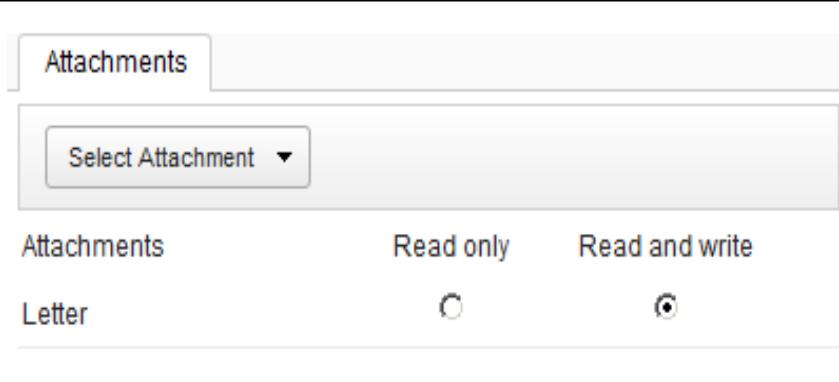
24

In the Step Properties area, click on the Edit icon to the right of **Attachments**

Click the **Select Attachment** button

Select the **Letter** attachment you defined earlier by clicking it

Click OK to add the attachment

25

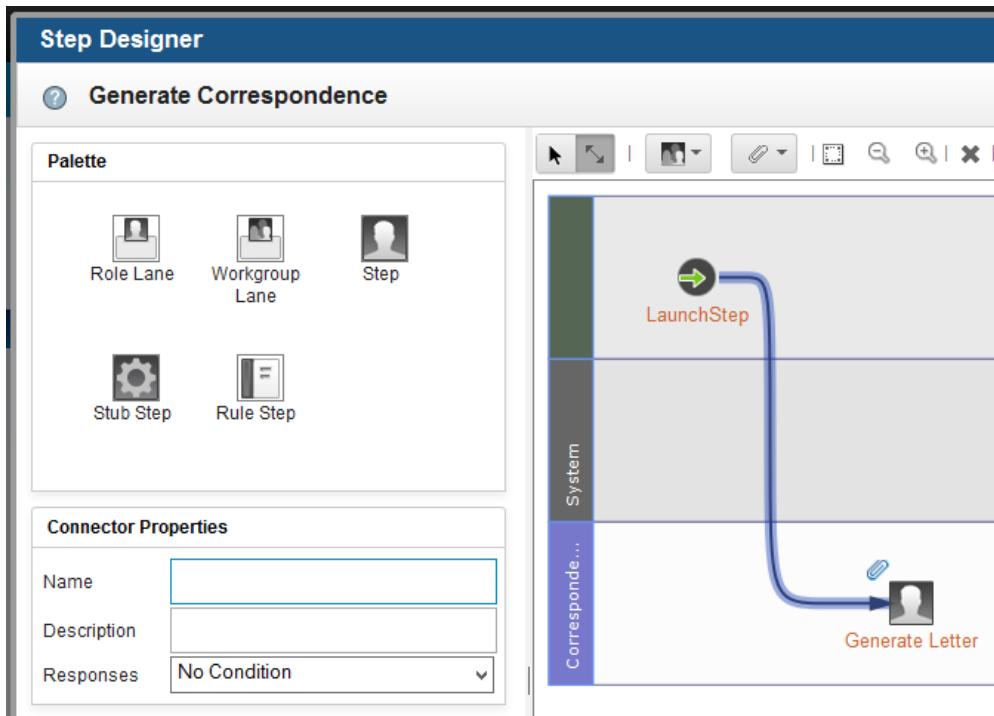
Make the attachment **read/write**

26

Click **OK** to close the Attachments panel

27 Click **Save** (right hand corner) to save all your changes

28

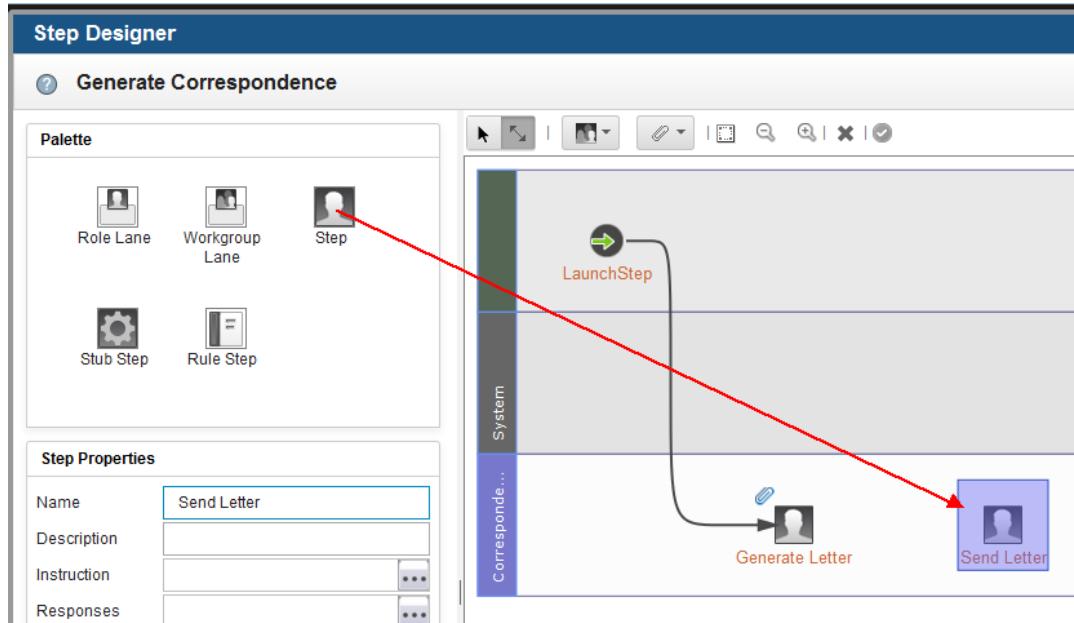


Click the **Connector** icon in the palette

Click on the **Launch Step** and drag onto the **Generate Letter** step to add a connector between them

Now you're going to add a Send Letter step to the Correspondence Team swimlane.

Step Action

1

Drag and drop another **Step** onto the **Correspondence Team** swimlane

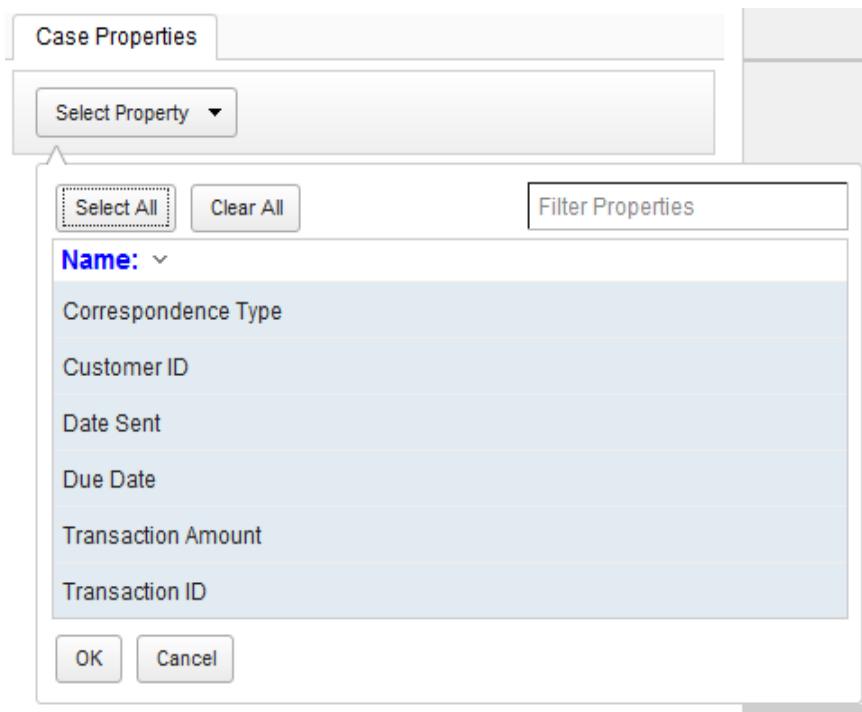
2

Click on the new step, and using the Step Properties panel on the left, name the step **Send Letter**

3

Case Properties

In the Step Properties panel, click on the Edit icon to the right of **Case Properties**

4

Click the **Select Property** button

Click the **Select All** button

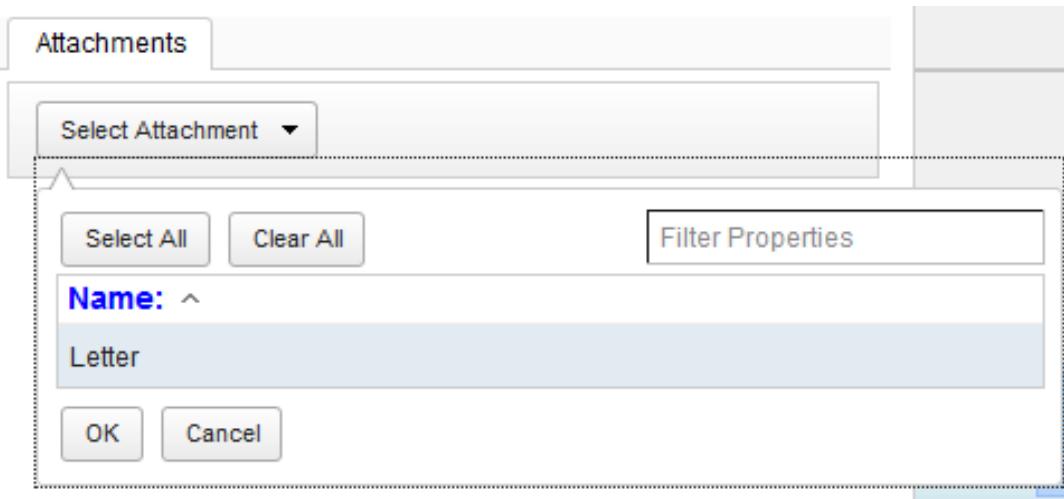
Click **OK** to add the properties as parameters

5

Case Properties	Read only	Read and write
Correspondence Type	<input checked="" type="radio"/>	<input type="radio"/>
Customer ID	<input checked="" type="radio"/>	<input type="radio"/>
Date Sent	<input type="radio"/>	<input checked="" type="radio"/>
Due Date	<input checked="" type="radio"/>	<input type="radio"/>
Transaction Amount	<input checked="" type="radio"/>	<input type="radio"/>
Transaction ID	<input checked="" type="radio"/>	<input type="radio"/>

Make **Date Sent** **read/write** and the others **read only**

Click **OK** to close the Case Properties dialog

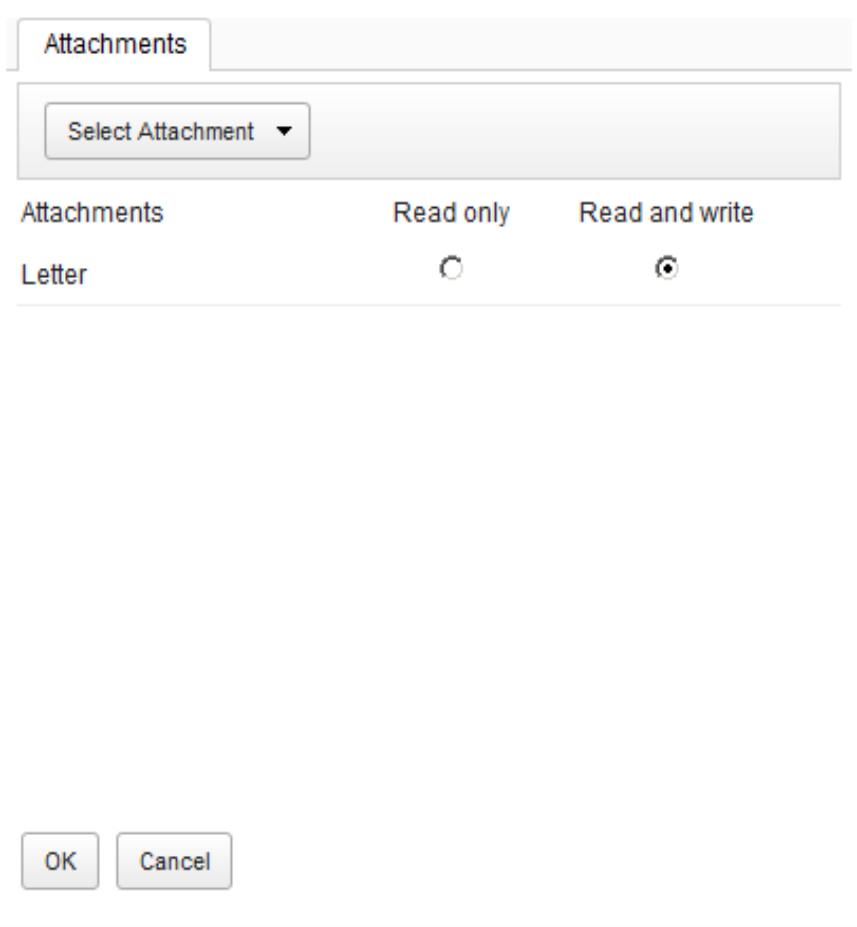
6

In the Step Properties panel, click on the Edit icon to the right of **Attachments**

Click the **Select Attachment** button

Select the **Letter** attachment you defined earlier by clicking it

Click the **OK** button

7

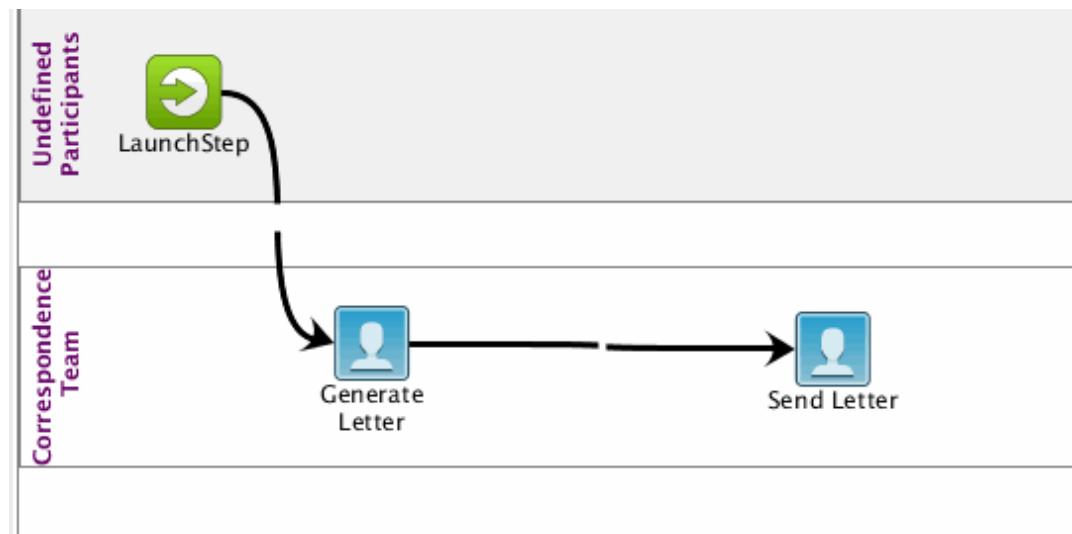
Make the attachment **read/write**

8

Click **OK** to close the Attachments panel

9 Click **Save** (right hand corner) to save all your changes

10



Click the Connector icon and click and drag from the **Generate Letter** step to the **Send Letter** step

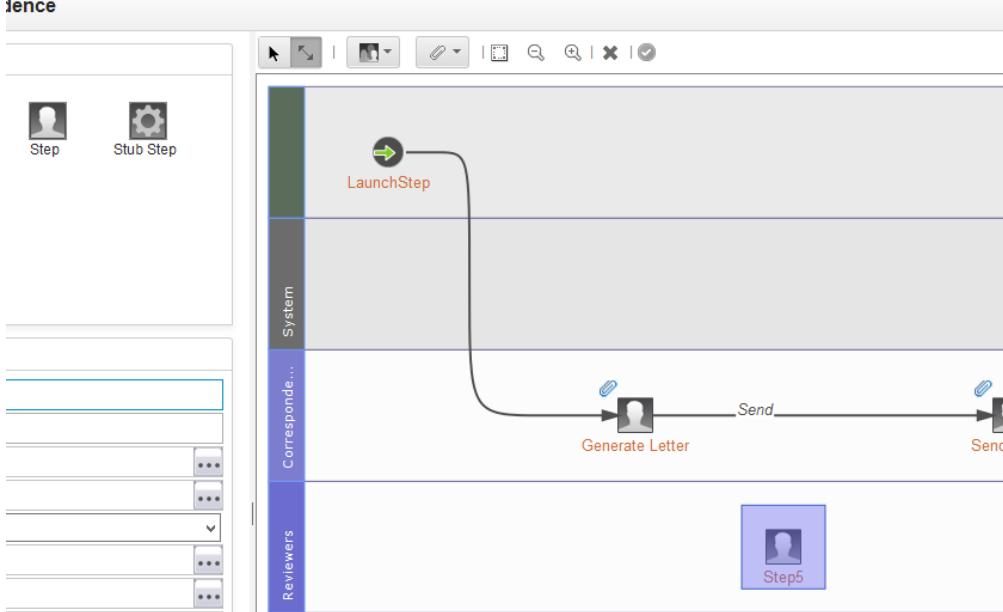
11

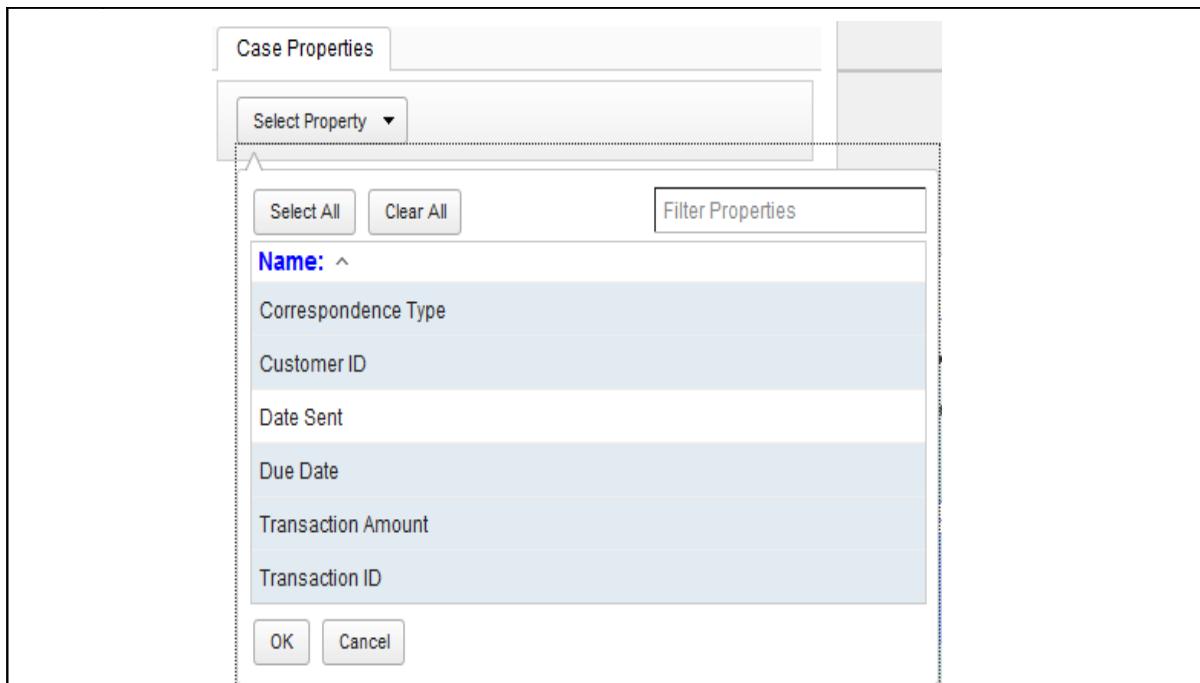
With the connector line still selected, in the **Connector Properties** panel on the left, enter **Send** as the connector name

Click on the dropdown beside the **Responses** property and set the condition on the connector to be **Send**. (If Send is not listed among the responses, click on Generate Letter and start this step again.)

12 Click **Save** (right hand corner) to save all your changes

Finally, you're going to add a review step to the workgroup (Reviewers) swimlane.

Step	Action
1	 <p>Drag and drop a Step onto the Reviewers swimlane</p>
2	<p>Click on the new step, and using the Step Properties panel on the left, name the step Review Letter</p>
3	<p>Responses </p> <p>In the Step Properties panel, click on the Edit icon to the right of Responses</p>
4	 <p>Add responses – Approve and Reject</p> <p>Click OK to save the response values</p>
5	<p>Case Properties </p> <p>In the Step Properties panel, click on the Edit icon to the right of Case Properties</p>



Add parameters – **Correspondence Type, Customer ID, Due Date, Transaction Amount and Transaction ID.** Click **OK** to save them.

6 Make all of them Read Only

Click **OK** to save the **Case Properties**

7



In the Step Properties panel, click on the Edit icon to the right of **Attachments**

Click the Select Attachment button and add the **Letter** attachment.

Make it **Read only**

8 Click OK to save your changes to the Attachment properties

9 Connect the **Generate Letter step to the **Review Letter** step using a connector**

10

Connector Properties

Name	Review
Description	
Responses	Review

The diagram shows a connector named "Review" connecting the "Generate Letter" step to the "Review Letter" step. The connector is labeled "Review" and has a response condition of "Review". The connector is highlighted in blue.

Click on the Connector and set its name to **Review**

Set the Response condition on the connector to be **Review**

11

Connector Properties

Name	Reject
Description	
Responses	Reject
OK	Cancel

The diagram shows a connector named "Reject" connecting the "Generate Letter" step to the "Review Letter" step. The connector is labeled "Reject" and has a response condition of "Reject". The connector is highlighted in blue.

Connect the **Review Letter** step back to **Generate Letter**

Click on the Connector and set its name to **Reject**

Set the Response condition to be **Reject**

12

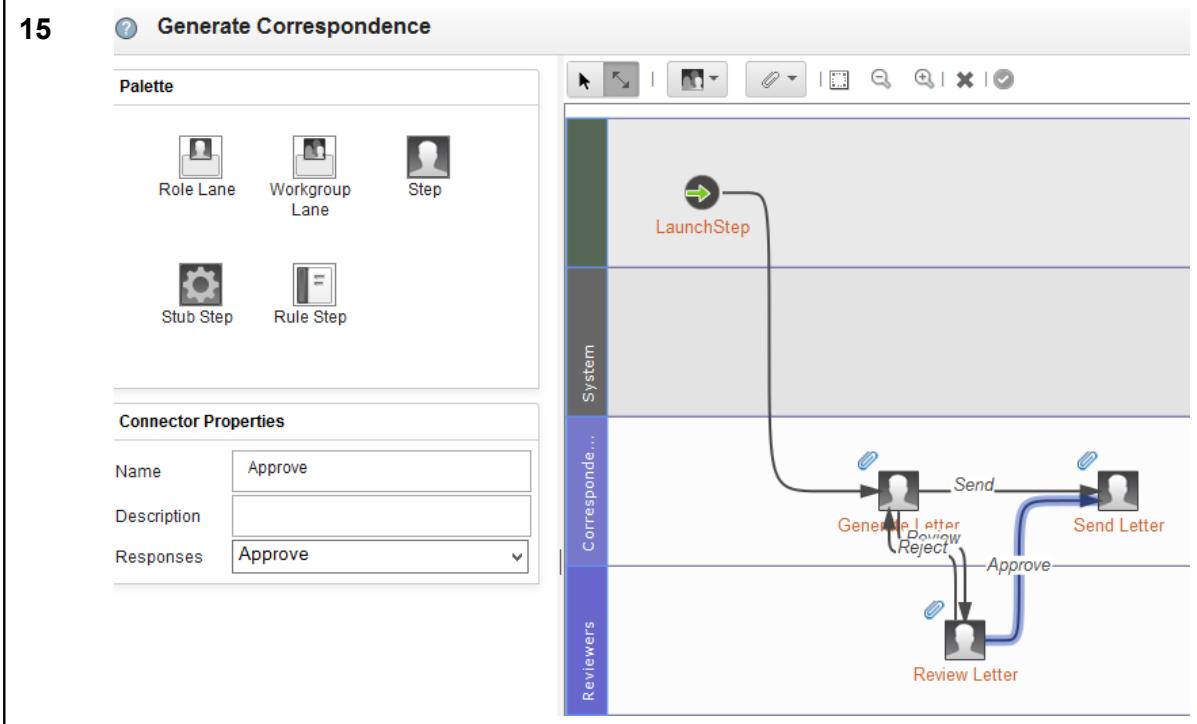
Click **Save** (right hand corner) to save all your changes

13

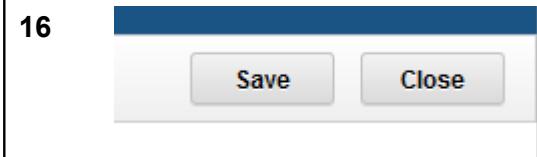
Connect the **Review Letter** step to the **Send Letter** step by selecting the connector icon again and dragging between them

14

Set the Name and Response condition to be **Approve**



Your task steps should look like the image above.



Click **Save** (right hand corner) to save all your changes

- 17** Click **Close** to close the editor
- 18** Click **Save** to save the updated case type
- 19** Go to the Views tab on the side, select the Properties Layout tab and click on Case Data View. Because we added a custom view as the default view, we need to configure to expose the workgroup property so the user can set it when they launch a discretionary task.
- 20** Left click to highlight the **Dispute Information** container. On the right under the Settings section, click the drop down next to the label **Automatically Include**:
- 21** Select **Workgroups**. This will expose the workgroup field to the end user. If you set the system-generated view as the default view, you do not need to set automatically include to workgroups.

22 Click the **Save** button and Click **Close**

23 Click **Save and Close** to save and close the Solution

24 Deploy the solution



From the **Manage Solutions** page, hover over the **Credit Card Disputes** solution to reveal the **Deploy** link

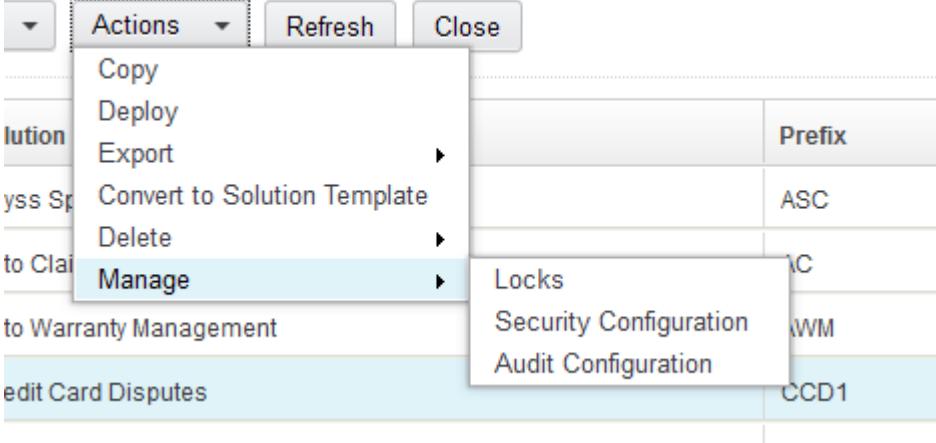
Click the Commit link, commit the changes, then the **Deploy** link to deploy the solution

Wait until the green checkmark is displayed indicating that your solution has been successfully deployed.

25 Logout of the **Case Manager Builder**.

7.4 Create a Security Manifest Definition

Now you will use the new Security Wizard to create a security manifest definition that will set the desired roles for runtime. This is a preferred method to using the Manage Roles option, because it is saved with the solution and it can in turn be used when the solution is ready to be migrated to a production environment for testing.

Step	Action
1	<p>Open the folder Programs, found on the desktop. Double-click the Case Manager Administration Client (2nd one listed). Login as p8admin/filenet</p>
2	<p>Select the CMDOS object store to open it. Click on the Solutions folder to open it.</p>
3	<p>Select the Credit Card Disputes solution Click Actions and select Configure > Security Configuration</p> 
4	<p>Under Options, click on the Create a security configuration radio button Click the Next button</p>

<p>Create or edit a security configuration</p> <p>Create a security configuration to assign permissions to objects and roles that are stored on a FileNet P8 Platform environment. Your environment might require additional security configuration. Attention: The wizard will overwrite any existing configuration.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">Solution name:</td> <td>Credit Card Disputes</td> </tr> <tr> <td>Solution prefix:</td> <td>CCD1</td> </tr> <tr> <td>Description:</td> <td>Solution for managing disputed credit card transactions</td> </tr> <tr> <td>* Options:</td> <td> <input checked="" type="radio"/> Create a security configuration <input type="radio"/> Edit a security configuration </td> </tr> </table> <p>5 Name the security configuration screen: Enter Dev for the Security manifest name Click Next</p> <p>6 Modify permissions for roles screen: Set security as follows</p> <p>Modify permissions for roles</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Case Type</th> <th>Role</th> <th>Create Case</th> <th>View Case</th> <th>Update Case</th> <th>Manage Case</th> </tr> </thead> <tbody> <tr> <td rowspan="3">Manage Dispute</td> <td>Correspondence Team</td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Customer Service Rep</td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Dispute Advisor</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> </tbody> </table> <p>Click Next</p> <p>7 Define the administrators and assign privileges screen: Click the Add button and add the groups Case Administrators and P8Admins Define the administrators and assign privileges</p> <p>Add users and groups that will administer the solution deployment, security configuration, and audit configuration. Only the users and groups listed here will have access to the solution.</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Add</th> <th>Remove</th> <th>Principal Type</th> <th>Short Name</th> <th>Display Name</th> <th>Full Control</th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td>User</td> <td>P8Admin</td> <td>Case Administrators</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td></td> <td></td> <td>Group</td> <td>Case Administrators</td> <td>Case Administrators</td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td></td> <td></td> <td>Group</td> <td>P8Admins</td> <td>P8Admins</td> <td><input checked="" type="checkbox"/></td> </tr> </tbody> </table> <p>Click Next</p> <p>8 Associate users and groups with roles screen:</p>	Solution name:	Credit Card Disputes	Solution prefix:	CCD1	Description:	Solution for managing disputed credit card transactions	* Options:	<input checked="" type="radio"/> Create a security configuration <input type="radio"/> Edit a security configuration	Case Type	Role	Create Case	View Case	Update Case	Manage Case	Manage Dispute	Correspondence Team	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Customer Service Rep	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Dispute Advisor	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Add	Remove	Principal Type	Short Name	Display Name	Full Control			User	P8Admin	Case Administrators	<input checked="" type="checkbox"/>			Group	Case Administrators	Case Administrators	<input checked="" type="checkbox"/>			Group	P8Admins	P8Admins	<input checked="" type="checkbox"/>
Solution name:	Credit Card Disputes																																																					
Solution prefix:	CCD1																																																					
Description:	Solution for managing disputed credit card transactions																																																					
* Options:	<input checked="" type="radio"/> Create a security configuration <input type="radio"/> Edit a security configuration																																																					
Case Type	Role	Create Case	View Case	Update Case	Manage Case																																																	
Manage Dispute	Correspondence Team	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																																																	
	Customer Service Rep	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																																																	
	Dispute Advisor	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>																																																	
Add	Remove	Principal Type	Short Name	Display Name	Full Control																																																	
		User	P8Admin	Case Administrators	<input checked="" type="checkbox"/>																																																	
		Group	Case Administrators	Case Administrators	<input checked="" type="checkbox"/>																																																	
		Group	P8Admins	P8Admins	<input checked="" type="checkbox"/>																																																	

click the **Add** button

9 The **Add users and groups to role** screen appears

On the lower right corner, click on the **Role** drop-down menu, and select **All Roles**

Add the group **Case Administrators** and **P8Admins**

Add the group **Case Workers** to the **Customer Service Rep** and the **Correspondence Team**

10 Back on the **Associate users and groups with roles** screen:

Click the **Expand All** button to see the group you just added for each role,

Associate users and groups with roles

<input type="button" value="Expand All"/> <input type="button" value="Collapse All"/> <input type="button" value="Add"/> <input type="button" value="Remove"/>			
Role	Principal Type	Short Name	Display Name
Correspondence Team	Group	Case Administrators	Case Administrators
	Group	Case Workers	Case Workers
	Group	P8Admins	P8Admins
Customer Service Rep	Group	Case Administrators	Case Administrators
	Group	Case Workers	Case Workers
	Group	P8Admins	P8Admins
Dispute Advisor			

Click **Next**

Note: This is the equivalent of using the Manage Roles button when you start testing. In a production-type environment, like UAT or actual Production, you would want the roles already defined to the appropriate users and groups.

11 Select the **Apply the security configuration** check box

Click **Save** and Click **Apply**

Notice that you can choose to

- Apply the role membership
- Apply to all discretionary tasks

When the security changes are applied, you should see

"The Dev security configuration was successfully applied", displayed

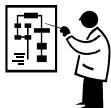
12 Click the **View Log** button, to view the log.

You can either save or open the log, if you open in Notepad, select **Format > Word Wrap** to make it more readable.

Review all the security changes that were made.

13 Logout of the Case Manager Administration Client.

Note: Once this security manifest is created, you can edit it in the future, add or change administrative users and groups and add or change users and groups associated with the roles, and re-apply the security manifest to the deployed solution.



8.0 Step-by-Step – Trying Out Manual Tasks

With our new manual tasks defined in Case Manager Builder, it's time to try them out in Case Manager Client.

8.1 – Mutually Exclusive Manual Tasks

Step	Action
------	--------

- 1 Launch **Case Manager Builder**, login as **psmall/filenet**

Note: you are NOT logging in as p8admin

The screenshot shows the 'Credit Card Disputes' solution details. It includes a thumbnail image of a credit card, the solution name, its purpose, prefix, and last modification date. Below the details is an action bar with links: Edit, Copy, Remove, Deploy, Commit, **Test** (which is highlighted with a red box), and More Actions.

From the **Manage Solutions** page, hover over the **Credit Card Disputes** solution to reveal the **Test** link

Click the **Test** link to open the Case Manager Client in a new window

- 2 Select the **Customer Service Rep** role

Navigate to the Cases page in the Solution by clicking the **Cases** tab

- 3 Click the **Add Case** dropdown and select the **Manage Dispute** case type

- 4 This will take you to the default **Add Case** page.

Notice that additional properties you added to the Case Data view are now displayed.

+ Dispute Information

*** Customer ID**

Due Date

Transaction ID

*** Transaction Amount**

+ Case Status

Correspondence Type

Date Sent

- 5** In the Case Data widget, enter this data into properties for the case.

Enter a customer ID of **600-12345**

For the Due Date, choose a date and time from the pickers

Enter **002-54321** for the Transaction ID

Enter **10000** for the Transaction Amount

- 6**

Click the **Add** button to create your new case

- 7** Use the case search, entering **600** as the search value, and clicking **Search**, to bring up a list of cases.

The screenshot shows a user interface for searching cases. At the top, there are two tabs: "Cases" (which is selected) and "Work". Below the tabs is a button labeled "Add Case ▾". A search bar is present with the label "Search:" and a dropdown menu set to "Customer ID". The search input field contains the value "600". To the right of the search bar is a list of cases. The first case in the list has its title highlighted in blue and contains the text "CCD1_ManageDispute_000000100001".

Title
CCD1_ManageDispute_000000100001

[Advanced Search](#)

-
- 8 Click the **Case ID** of the case you just created to display the case details page.
If it's not obvious which case to choose, you can click anywhere in a case's entry in the list to display the case's information in the Case Summary on the right-hand side.
-

9 **CCD1_ManageDispute_000000130001** | Modified: 7/11/20

Comments | Add Task | Add Custom Task | Split Case

Documents | **Tasks** | History

Add Task

Required (1)

Review Dispute Item
Started on 7/11/2014, 3:52 PM

Optional (3)

Client Audit
Ready | Start | Disable

Generate Correspondence
Ready | Start | Disable

Merchant Audit
Ready | Start | Disable

Click the **Tasks** tab in the Case Information widget

Notice that the two manual tasks you created are shown in the Optional section. The Audit ones are ready to start because you entered an amount > 5000. If you hadn't, they would be in a waiting state.

-
- 10 Click the **Start** link beneath the **Client Audit** task, and confirm that you want to start the task
-
- 11 Notice that the Client Audit task starts and becomes required, and that the other member of its mutually exclusive set (Merchant Audit) becomes disabled
-

CCD1_ManageDispute_000000130001 | Modified: 7/11/2014[Comments](#)[Add Task](#)[Add Custom Task](#)[Split Case](#)[Documents](#)[Tasks](#)[History](#)[Add Task](#)**Required (2)****Client Audit**

Started on 7/11/2014, 3:56 PM

**Review Dispute Item**

Started on 7/11/2014, 3:52 PM

Optional (1)**Generate Correspondence**[Ready](#) | [Start](#) | [Disable](#)**Disabled (1)****Merchant Audit**

Disabled by System

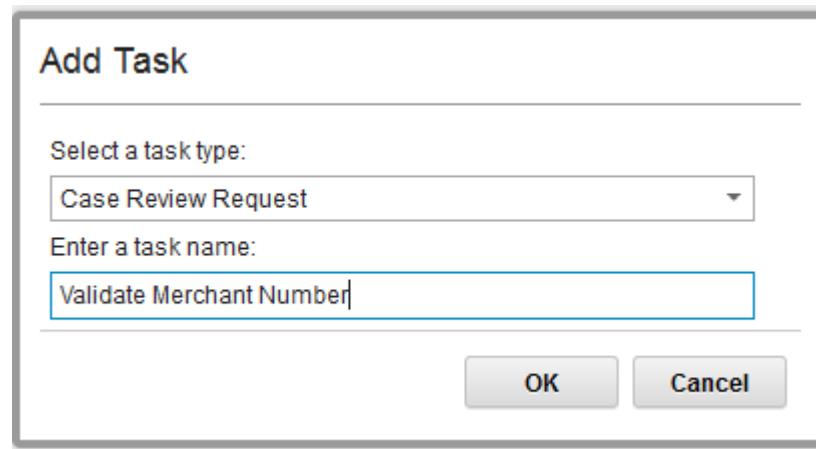
8.2 – User-Created Manual Tasks

- 1 Next, let's try out the Case Review Request user-created task we created. This is a user-created task that can be created as many times as you want.

The screenshot shows the IBM Case Manager interface. At the top, there is a header bar with the IBM logo and a navigation bar with 'Cases' and 'Work' tabs. Below the header, the case ID 'Case CCD1_ManageDispute_000000100001' is displayed. The main content area shows the case title 'CCD1_ManageDispute_000000100001' and the last modified date 'Modified: 1/14/2014, 12:51'. Below the title, there is a toolbar with buttons for 'Comments', 'Add Task' (which is highlighted with a red box), 'Add Custom Task', and 'Split Case'. Underneath the toolbar, there are three tabs: 'Documents', 'Tasks' (which is selected and highlighted with a blue border), and 'History'. A sub-toolbar below the tabs has a 'Add Task' button. A section titled 'Required (2)' lists two tasks: 'Client Audit' (started on 1/14/2014, 1:03 PM) and 'Review Dispute Item' (started on 1/14/2014, 12:46 PM). On the right side of the screen, there are two buttons: 'Dispute' and 'Case S'.

Click **Add task** in the Case toolbar

- 2 You will see a task dialog that looks like this:



-
- 3** Use the Task Type dropdown to select your user-created task – **Case Review Request**
-
- 4** Give the new task the name **Validate Merchant Number**
-
- 5** Click **OK** to launch the task
-
- 6** This user-created task uses the Add Task page.

▼ **Dispute Information**

* Customer ID

600-12345

Due Date

10/30/2014



12:00 AM



Transaction ID

002-54321

* Transaction Amount

10,000

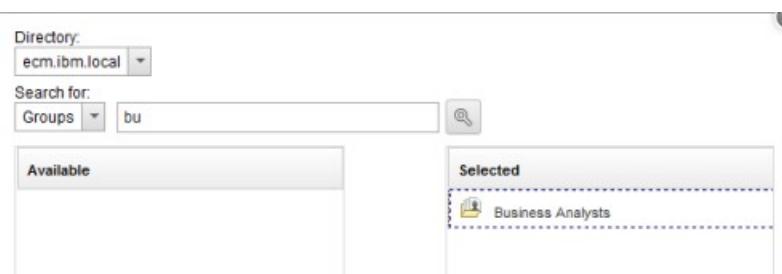
Enter Reviewers

No items to display ▾

When we created the launch step for this task, we added the Case Reviewers workgroup as a parameter and it shows up in the Properties widget as something we must set. Note that we set up a custom view so we had to add this property explicitly.

Click the dropdown labeled Enter Reviewers.

-
- 7**



Enter the group **Business Analysts** as the reviewers of this task

Click **OK** to close the dialog

8

▼ Dispute Information

* Customer ID

600-12345

Due Date

10/30/2014



12:00 AM



Transaction ID

002-54321

* Transaction Amount

10,000

Enter Reviewers

Business Analysts ▾

▼ Case Status

* Correspondence Type

No Documents Sent ▾

Date Sent

10/26/2014



12:00 AM



Business Analysts is now displayed as the Reviewers.

Click **OK** to close the dialog

9

Credit Card Disputes | Customer Service Rep ▾

[View Instructions](#)

Add

Cancel



Click the **Add** button (at the top right) to launch the task

The task should now be in the **Personal Tasks** in-basket on the Work page.

10

In **Personal Tasks** in-basket, click on the case link to open it.

Click the Tasks tab, in the Tasks list, notice that the **Validate Merchant Number** task is now shown as being in progress (Started on [timestamp])

CCD1_ManageDispute_000000130001

Documents Tasks History

Add Task

Required (3)

- Client Audit
Started on 7/11/2014, 3:56 PM
- Review Dispute Item
Started on 7/11/2014, 3:52 PM
- Validate Merchant Number
Started on 7/11/2014, 4:11 PM

Optional (1)

- Generate Correspondence
Ready | Start | Disable

11 Complete the Validate Merchant Number task.

8.3 – Standard Manual Tasks

- 1** Finally, let's try out the Generate Correspondence task. It is the first Optional task in the list.

Click the **Start** link beneath the Generate Correspondence task, and confirm.

The task will move to the required, in progress state.

-
- 2** Change your role to the **Correspondence Team**

Click the **Work** tab

-
- 3** Notice your new work item in the Correspondence Team's (role) In-basket

▲ Due Date	Customer ID
10/31/2011 12:00 AM	600-12345

Click the **Due Date** value to open the work item

-
- 4** You will now be at the Generate Letter step of the Generate Correspondence task

Generate Letter | Generate Correspondence

Comments	CCD1_ManageDispute_000000100001
Dispute Information	Documents Tasks History
* Customer ID 600-12345	Add Task
Due Date 10/30/2014 <input type="button" value="Calendar"/> 12:00 AM <input type="button" value="Clock"/>	Required (4)
Transaction ID 002-54321	Client Audit Started on 10/26/2014, 2:10 PM
* Transaction Amount 10,000	Generate Correspondence Started on 10/26/2014, 2:25 PM
Enter Reviewers No items to display	Review Dispute Item Started on 10/26/2014, 2:09 PM
Case Status	Validate Merchant Number Completed on 10/26/2014, 2:24 PM
* Correspondence Type No Documents Sent	Attachments
Date Sent 10/26/2014 <input type="button" value="Calendar"/> 12:00 AM <input type="button" value="Clock"/>	Add Open Actions <input type="button" value="Letter"/>

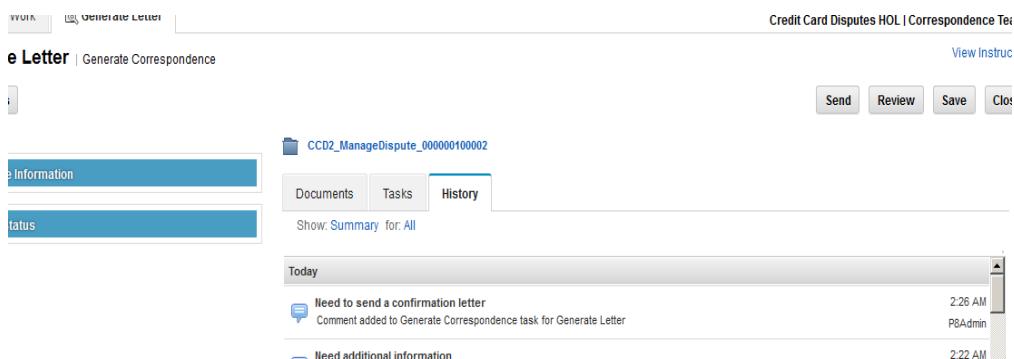
Click the **Comments** button to add a comment for this task.

In the Comment box, add “a comment ”

Click **Add** to save the comment

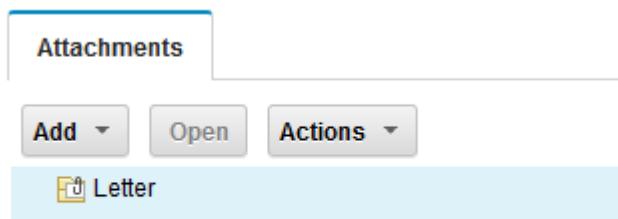
Click **Close** to close the Comments dialog

Your comment will be associated with this task and added to the Case History:



5 The job at this point for the Correspondence Team is to generate a letter that will be sent to the client.

6 Once they have created the letter, they attach it to this work item using the **Attachment** widget (below **Case Information** on the right)



Select the Letter attachment and Click the **Add** and select “Add document from repository” option.

7 The document can reside either in the content repository or on the user’s local machine.

Select Item

Search in: **\ICMTARGET (Including subfolders)** **Search options:** Documents, Released version

Class: **Document (Including subclasses)**

Document Title **Starts With** Letter

Add Property Show All Properties **Property options:** Match all

Search Reset Results Display Keep search criteria open

Search Results

Refresh | Properties Actions ▾

	Name	Size	Modified By	Modified On	Major Version
	Letter.pdf	8 KB	P8Admin	9/16/2013, 2:34 AM	1

OK Cancel

For this example, select **A repository**

In the **Select a repository** dropdown, select **ICMCMTOS**

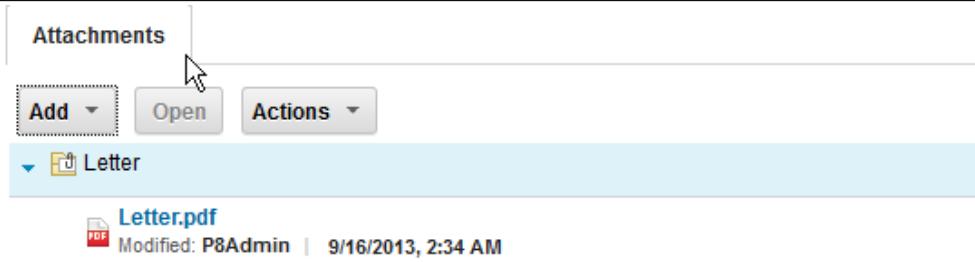
8 Enter **Letter** for the search value in the Document Title

Click **Search**

9 In the Search Results, you will see a search result with **Letter.pdf**

Select **Letter** and click the **OK** button

10 The document will be attached to the work item.



Click the document and click on the Open button to see it displayed in the Document Viewer widget

- 11 Just like we did for the previous task that routed work to workgroup members, we set up this task to allow the user to select who will receive the job of reviewing the document.

In the **Properties** widget, click the dropdown beside **Enter Reviewers**

Click the **Add** button

- 12 Enter the group Business Analysts as the Reviewers of this task

Click the **Search** button

Click on Business Analysts and click on the plus icon to move it to the Selected section.

Click **OK** to close the dialog

- 13 Once again, we can see the responses we configured for this step of the task and how they control which route the work item takes.

Click the **Review** button to route it to our reviewers. If you then look in the **Personal Tasks in-basket**, you should see the work item, and clicking on it should show it at the **Review Letter** step. At this point the reviewer would open the attachment Letter, review it, and **Approve** or **Reject** it.

You have now explored how the tasks you define in the IBM Case Manager Builder look and behave in the Case Manager Client. Logout of the Case Manager Client and the IBM Case Manager Builder.

In the next section of this lab you will learn how you can customize the IBM Case Manager Client pages you have been using up to now.



9.0 Step-by-Step – Customizing the Runtime Environment

Now that you have successfully deployed and tested the solution using the default user interface pages provided by the IBM Case Manager Client, this section will show you how you can quickly and easily customize some of these pages for your solution.

When you deploy a solution from the Case Builder, a set of pages for your solution are automatically added into the Case Manager Client application. For solutions created in Case Manager 5.2, the default pages are listed here.

- Default Solution (the main page types end users of the solution will visit):
 - Work Page
 - Cases Page
- Default Case Pages (hidden from the end users):
 - Add Case
 - Case Details
 - Split Case
 - Add Case Form
 - Case Details Form
- Default Step Pages (hidden from the end users):
 - Add Task
 - Work Details
 - Form Attachment Work Details
 - Add Task Form
 - Work Details Form

Notice the pairs of page names with and without “Form” at the end; e.g., Add Case and Add Case Form. Form pages allow you to use a P8 eForm or an IBM Form as an alternative to using widget fields to enter case property values. You will use the Work Details Form later in this workshop.

First, you will customize the default pages that are available to the solution. Then, you will create custom pages for Case Details and Work Details which will be available to specific roles.

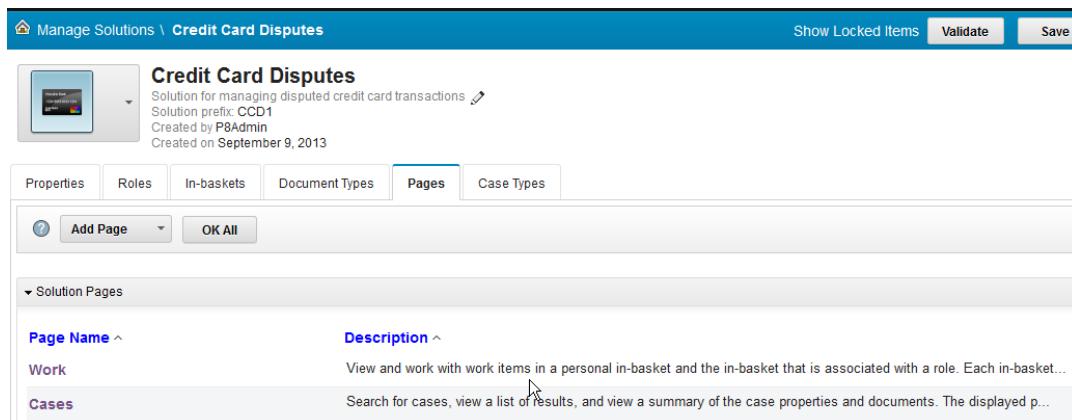
Continue using the **Credit Card Disputes** solution.

Note: Changes made to the default pages will affect your entire solution, so in some situations it is appropriate to make a copy of the default page and have the modified version be used, such as for specific roles.

9.1 – Customizing the Default Pages

In this exercise, you will customize the **Cases** page in your main solution.

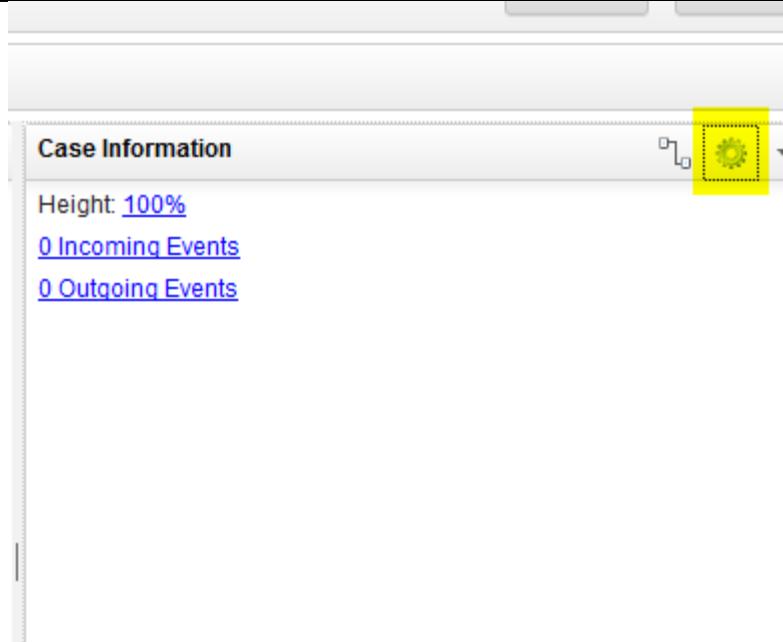
Step	Action
1	Login to the IBM Case Manager Builder as p8admin/filenet.
2	Open the Credit Card Disputes solution, Pages tab Expand the Solution Pages



The screenshot shows the 'Manage Solutions' interface for the 'Credit Card Disputes' solution. The 'Pages' tab is selected. The 'Solution Pages' section is expanded, displaying two entries: 'Work' and 'Cases'. The 'Cases' entry has a tooltip describing it as a search and view page for cases.

-
- 3 Under the Solution Pages, click the **Cases Page** link to open the Page Designer
- 4 The Page Designer allows the business analyst to configure the look and feel of the pages, the positioning of the widgets as well as add any custom widgets on the page. The Case Widgets palette on the left contains all of the widgets that are available to add to a page. The Utility widgets palette has the Script Adapter and the Website widgets. For this exercise, you are just going to customize this page by modifying the view of the Case Information widget.
-

5



Click the widget settings menu (The gear icon) at the top right of the **Case Information widget**.

- 6 Note that the activity of customizing the Pages is design time in Case Builder whereas in the prior versions of Case Manager this was not in Case Builder.
-

7

Case Information

Settings Menus Toolbars

Select the views to display in the Case Information
More

Display the case ID in the Case Information w

Available Views:

Set tab visibility and set tab order:		
<input checked="" type="checkbox"/>	Summary	
<input type="checkbox"/>	Documents	
<input checked="" type="checkbox"/>	Tasks	
<input checked="" type="checkbox"/>	History	

▶ Documents

Make sure that the Documents checkbox is un-checked to hide its tab from the Case Information widget view

Also, the **Tasks** and **History** checkboxes should be selected.

-
- 8 Click **OK** to save the widget's Edit Settings mode. Click **Save** to save the changes made to the Case page and **Close** the Page Designer.

9 

Click **Save and Close** to save changes to the solution.

 Credit Card Disputes
Solution for managing disputed credit card transactions
Solution Prefix: CCD1
Last modified by P8Admin on 9/16/2013, 4:38 AM

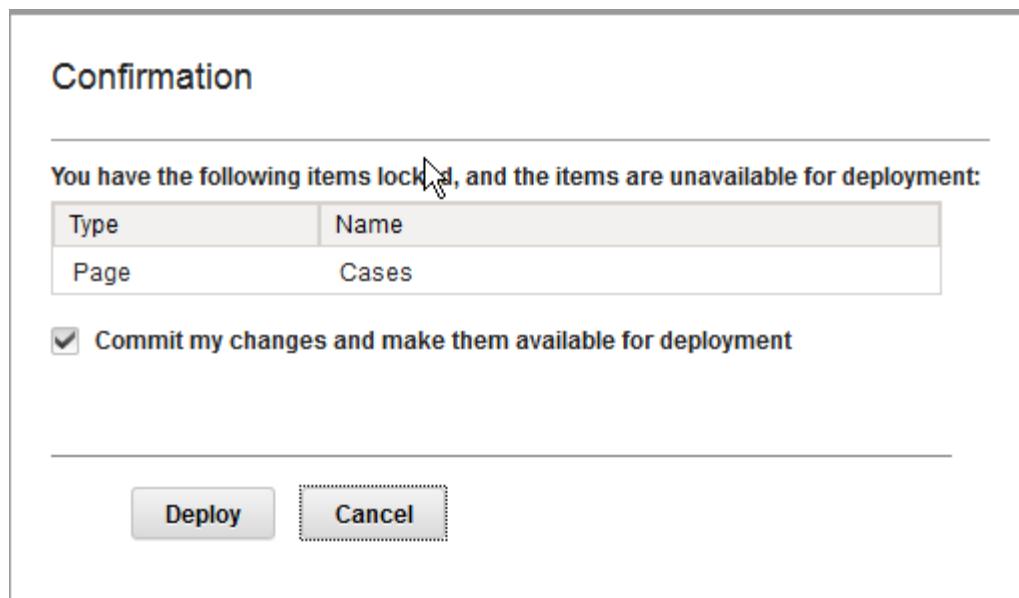
Edit | Copy | Remove | Deploy | Commit | Test | More Actions ▾

Deploy the solution into a test environment.

 Auto Warranty Management

Click Deploy to make your changes effective in Case Client.

Confirm the changes, and click Deploy.



-
- 10** After the deployment completes successfully, logout of the IBM Case Manager Builder.
-
- 10** Test the changes by logging onto the Case Client as psmall/filenet, Search for cases and select one of the Cases. You will notice that the Case Information widget now displays the Tasks tab in addition to the Summary and History tabs.

You have successfully customized one of the default pages. You can do any kind of

customization that you would like to these pages – adding toolbar buttons, adding/deleting/moving widgets, etc.

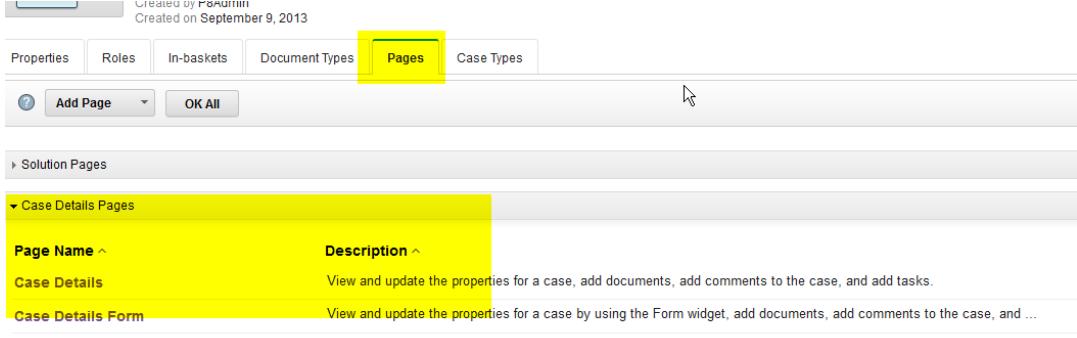
In the main solution where the Work and Cases pages are, you can even add additional pages that contain other widgets that complement your solution.

Logout go the IBM Case Manager Client.

In the next exercise, you will create a new Case Details page that will be used by the Dispute Advisor role.

9.2 – Creating a customized Case Details page for a specific role

In this exercise, you will create a new Case Details page and assign it to the Dispute Advisor role.

Step	Action
1	Logon to the Case Builder as p8admin/filenet. Open the Credit Card Dispute solution.
2	Under the Pages tab, click on the Case Details section to reveal the pages Case Details and Case Details Form  The screenshot shows the 'Pages' tab selected in the navigation bar. Under the 'Case Details' section, two items are listed: 'Case Details' and 'Case Details Form'. Both items have their descriptions visible below them. A yellow box highlights the 'Case Details' item and its description. The 'Add Page' button is visible at the bottom left of the list area.
3	Add a new Case Details page by clicking on the Add Page button and selecting the Case Details Page .

Properties Roles In-baskets Document Types Pages Case Types

Add Page OK All

Solution Page
Case Details Page
Add Case Page
Split Case Page
Add Task Page
Work Details Page
Custom Task Details Page
Advisor Case Details

Description ^
Show specific details interesting to the Dispute Advisor

Case Details View and update the properties for a case, add documents, add comments to the case, and add tasks.

6

Case Details Pages

Page Name ^	Description ^
*Name: Advisor Case Details	Description: Show specific details interesting to the Dispute Advisor
*Unique Identifier: AdvisorCaseDetails	
Case Details	View and update the properties for a case, add documents, add comments to the case, and add tasks.
Case Details Form	View and update the properties for a case by using the Form widget, add documents, add comments to the case, and add tasks.

Give your new page a name – **Advisor Case Details**

Also give it a description – **Show specific details interesting to the Dispute Advisor**

Click **OK** to create your new page, which will be displayed immediately

7

Click on the **Advisor Case Details** link to open the newly created page in the Page Designer

Advisor Case Details Save

Case Widgets

- Attachments
- Case Information
- Case List
- Case Toolbar
- Content List
- Form
- Utility Widgets
- Script Adapter
- Website Viewer

Case Toolbar

Height: Automatic
0 Incoming Events
0 Outgoing Events

Case Information

Height: 100% ▲
0 Incoming Events
0 Outgoing Events

Properties

Height: 100% ▲
0 Incoming Events
0 Outgoing Events

Timeline Visualizer

Height: 215Pixels
0 Incoming Events
0 Outgoing Events

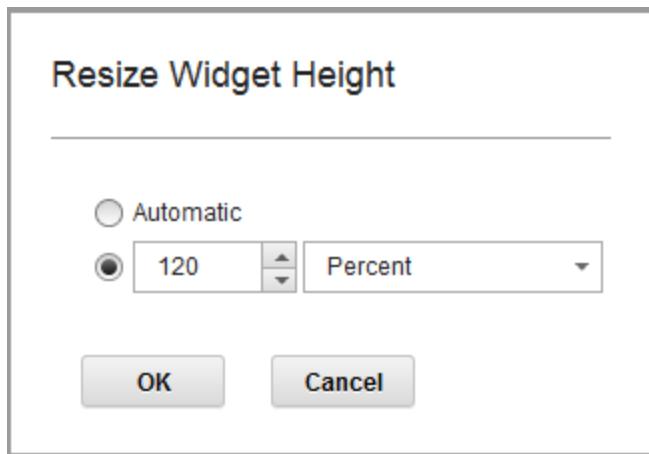


8



Click the Properties **widget's** settings menu and choose the **Resize** command

9



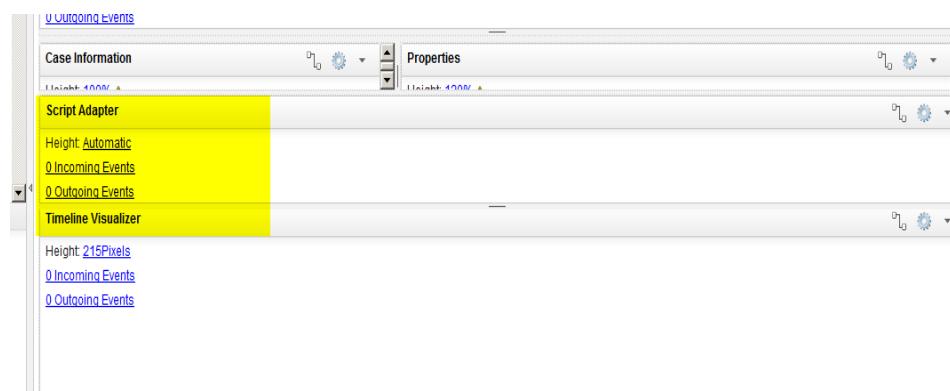
Change the **Widget height** to **120%** and click **OK**

10

Find the Script Adapter widget in the Widgets Palette and add it to the Advisor Case Details page by dragging and dropping it on the page above the timeline visualizer widget. The widget should be displayed in an arbitrary location on the page.

11

Now you will position and configure your widget



You will now configure the Script Adapter widget. The Script Adapter widget is a useful tool to help you understand event information that can be passed between widgets.

Step Action

1



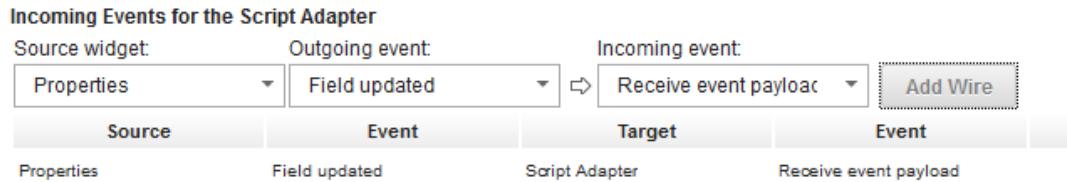
Click the **Script Adapter** widget's wiring menu option as shown above

- 2 The Widget Wiring dialog will appear. Many widgets expose a set of events that they can send to or receive from other widgets. These events pass payloads of data that may be understood by the other widgets on the page.

The payloads can be simple text strings or complex hierarchical structures.

In the Wiring dialog, under the Incoming event for Script adapter, select the **Properties** as the Source Widget.

- 3 You must now specify which Properties event you want sent to the Script Adapter. Click on the Outgoing Event, then choose **Field updated**.
-
- 4 Leave the Incoming event to receive as **Receive event payload**. (There are no alternative event types supported by this widget.) and click Add Wire
-



-
- 5** In the wiring dialog, click **OK** to close the dialog and save your wiring changes.
 Note that we did not choose to wire an event from Script Adapter to another widget on the page. This would commonly be done in other situations.
- 6** At the top right, click on **Save** to save your changes to the Advisor Case Details page.

[Close the Page designer](#)

Now you will register this page with the Dispute Advisor role.

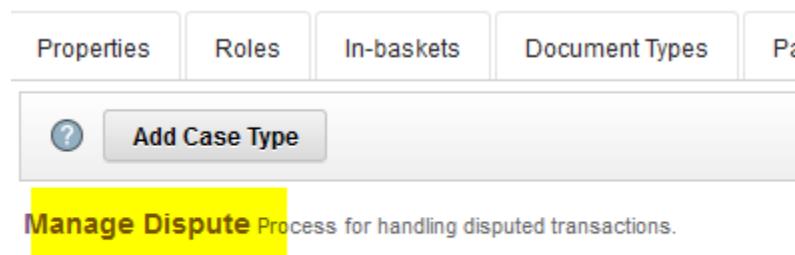
Step Action

7

The screenshot shows the 'Case Types' tab in the Process Designer. At the top, there are tabs for Properties, Roles, In-baskets, Document Types, Pages, and Case Types, with Case Types being the active tab. Below the tabs is a button labeled 'Add Case Type'. Underneath the button, a process element named 'Manage Dispute' is shown, described as a 'Process for handling disputed transactions.'

On your main **Credit Card Disputes** solution page, click the **Case Types** tab.

-
- 8 Click the **Manage Dispute** case type



-
- 9 Make sure **Case Type** is selected from the panel on the left

- 10 Notice how you can set your own page for the Add Case page, the Split Case page, and the Case Details page seen by all roles.

Default layout for Add Case page:	<input type="text" value="Default Add Case page"/>
Default layout for Split Case page:	<input type="text" value="<None>"/>
Default layout for Case Details page:	<input type="text" value="Default Case Details page"/>

For this example, we are just going to override the Case Details page for a single role.

-
- 11 Override default case details page layout for:

<input type="button" value="Correspondence Team"/> <input type="button" value="Correspondence Team"/> <input type="button" value="Customer Service Rep"/> <input style="background-color: #0070C0; color: white; font-weight: bold;" type="button" value="Dispute Advisor"/>	<input type="button" value="Add Role"/> <input type="text" value="Case details page layout"/> <input type="button" value="Dispute Advisor"/>
---	--

Under **Override default case details page layout for:**, use the dropdown to select the **Dispute Advisor** role

-
- 12 Click the **Add Role** button to create a case details page override for the Dispute Advisor role

-
- 13 The Dispute Advisor will appear in the list of roles below.



Click on the dropdown list under **Case details page layout**

Select your new details page, **Advisor Case Details**. (It's now there because you registered it after you created it)

-
- 14** Click **Save and Close** to save your changes and exit the solution
-

Now one last time, commit and redeploy your solution, and test your changes.

Step	Action
------	--------

15



The screenshot shows the 'Credit Card Disputes' solution listed in the Manage Solutions interface. It includes a thumbnail image of a credit card, the solution name, a description, a prefix, and a last modified timestamp. Below the solution details is a horizontal menu bar with links: Edit, Copy, Remove, Deploy, Commit, Test, and More Actions.

From the **Manage Solutions** page, hover over the **Credit Cards Disputes** solution to reveal the **Deploy** link

Click the **Deploy** link to deploy the solution

16

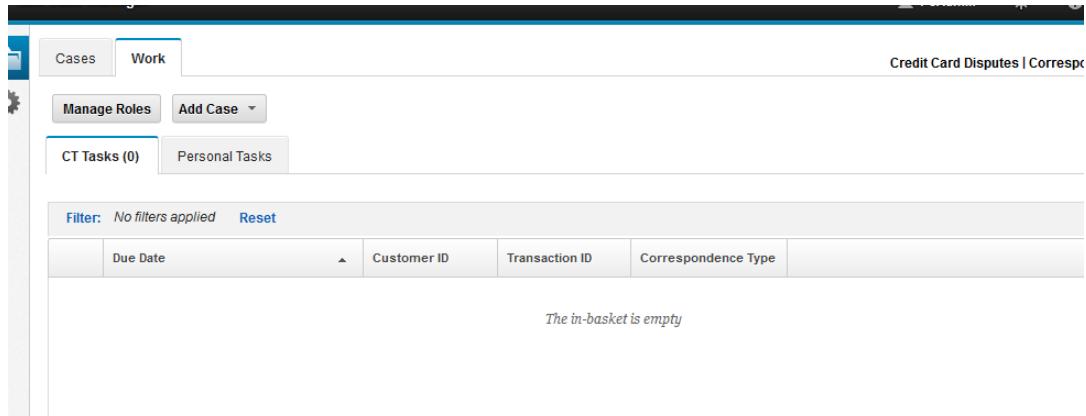
Wait until the green circled checkmark is displayed, indicating that your solution has been successfully deployed.

From the **Manage Solutions** page, hover over the **Credit Cards Disputes** solution to reveal the **Test** link

Click the **Test** link to open the Case Manager Client in a new window

17

You should now see a screen similar to this:



The screenshot shows the Case Manager Client interface on the 'Work' page. The top navigation bar includes tabs for 'Cases' and 'Work'. On the right, there's a sidebar with 'Manage Roles' and 'Add Case' buttons. The main area displays a message stating 'The in-basket is empty'. At the bottom, there are filter options for 'Due Date', 'Customer ID', 'Transaction ID', and 'Correspondence Type'.

18

Ensure that the **Credit Card Disputes** is selected in the dropdown to the right.

19

If you aren't already on the **Work** page, click the **Work** page tab

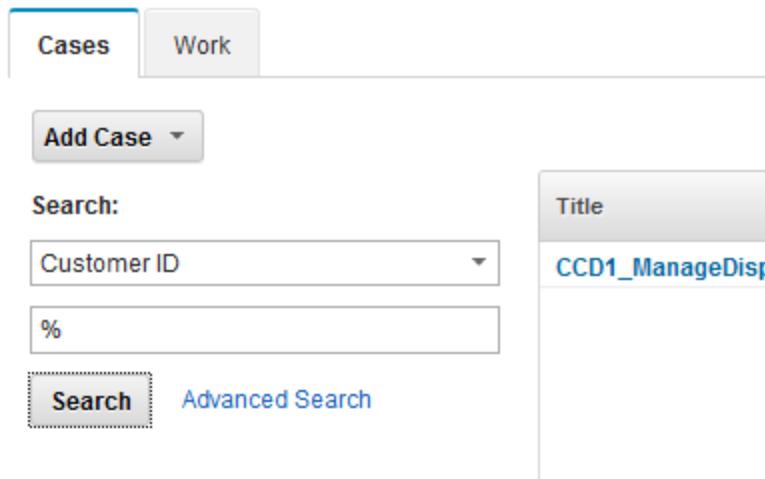
20

Use the **Role** dropdown menu on the right to change to the **Dispute Advisor** role.
If you don't see the Dispute Advisor role, then click on Manage Roles and add

p8admin to the Dispute Advisor role.

- 21 Click the **Cases** tab to display that page
-

- 22 Enter % to do a wildcard search in the Customer ID field.



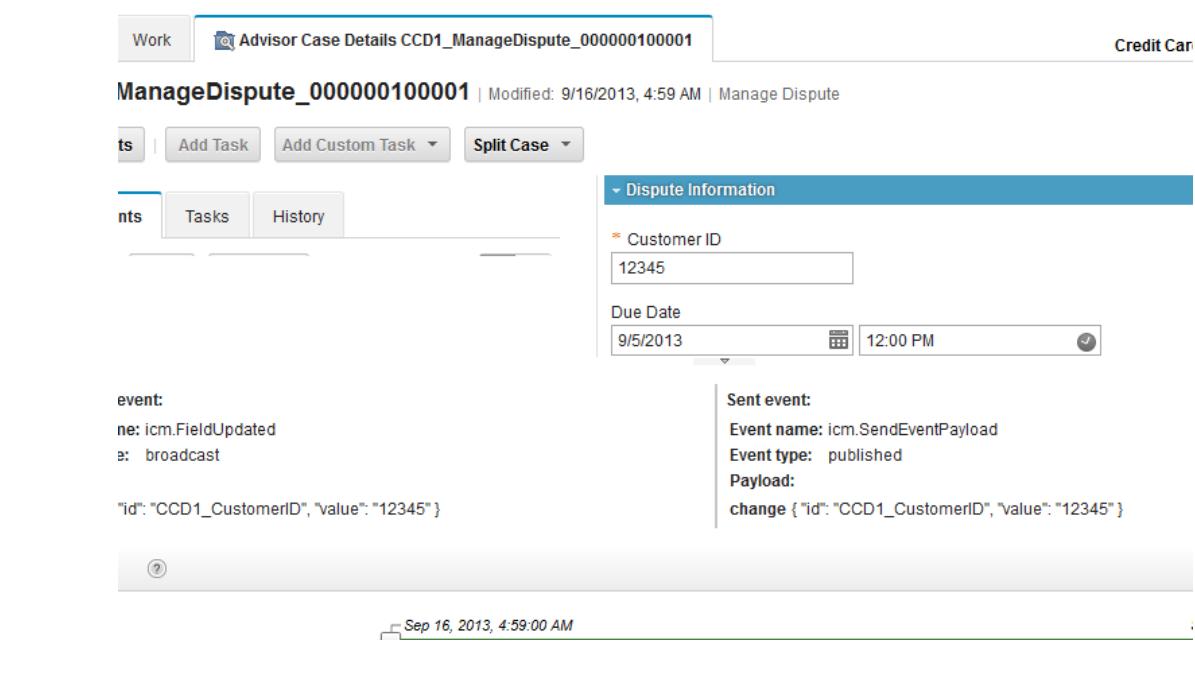
The screenshot shows the Oracle Service Cloud interface. At the top, there are two tabs: 'Cases' (which is highlighted in blue) and 'Work'. Below the tabs is a search bar with the label 'Search:' and dropdown menus for 'Customer ID' and 'Title'. The 'Customer ID' dropdown has a value of '%' selected. To the right of the search bar is a vertical list of cases. The first case in the list is titled 'CCD1_ManageDisp'. At the bottom left of the search area are two buttons: 'Search' (which is highlighted with a dashed border) and 'Advanced Search'.

Click **Search** to see the results in the Case List widget. If there are no cases found, add one and return here.

- 23 Click on the case link in the list to open it in its associated case detail page
Notice that the case is being displayed in your customized **Advisor Case Details** page.
-

-
- 24 In the **Properties** widget, change the **Customer ID** value.

Notice what is now displayed in the Script Adapter widget. You should see information about its Received Event, including a Payload containing the new value of the Customer ID field.



The screenshot shows the IBM Worklight interface for managing disputes. The top navigation bar includes 'Work' (selected), 'Advisor Case Details CCD1_ManageDispute_000000100001', and 'Credit Car'. Below the navigation is a toolbar with 'ts' (selected), 'Add Task', 'Add Custom Task', and 'Split Case'. A main content area displays a 'ManageDispute_000000100001' case, last modified on 9/16/2013 at 4:59 AM. The 'Dispute Information' panel contains fields for 'Customer ID' (12345) and 'Due Date' (9/5/2013 at 12:00 PM). On the left, the 'Events' tab is selected, showing an event log entry: 'event: ne: icm.FieldUpdated a: broadcast {"id": "CCD1_CustomerID", "value": "12345"}'. On the right, the 'Sent event' panel shows an event log entry: 'Event name: icm.SendEventPayload Event type: published Payload: change {"id": "CCD1_CustomerID", "value": "12345"}'. At the bottom, a timestamp indicates the event was sent on Sep 16, 2013, at 4:59:00 AM.

9.3 – Customized task step pages

You can also create your own **task** step pages in exactly the same way by duplicating one of the default Work Details Pages, and customizing the new page to fit your task step.

You associate your custom pages with a task step's Page Layout property in the Case Manager Builder's Step Designer.

The screenshot shows the 'Step Properties' dialog box for a task step named 'Initiate Dispute'. The 'Page Layout' field is highlighted with a red border and contains a dropdown menu with several options. The option 'Review Dispute Details' is selected and highlighted in blue. Other visible options include 'Work Details', 'Form Attachment Work Details', 'Work Details', and 'Work Details Form'. The other fields in the dialog include Name, Description, Instruction, Responses, Reassign, Deadline, Case Properties, Workgroups, Attachments, and Data fields, each with their respective input fields and buttons.

Step Properties	
Name	Initiate Dispute
Description	
Instruction	[...]
Responses	Submit Dispute,Close Case [...]
Reassign	Yes
Deadline	[...]
Case Properties	Read and write [...]
Workgroups	[...]
Attachments	[...]
Data fields	[...]
Page Layout	Work Details
Swimlane	Form Attachment Work Details
Split	Review Dispute Details
Join	Work Details
	Work Details Form

9.4 – Enabling Split Case Functionality

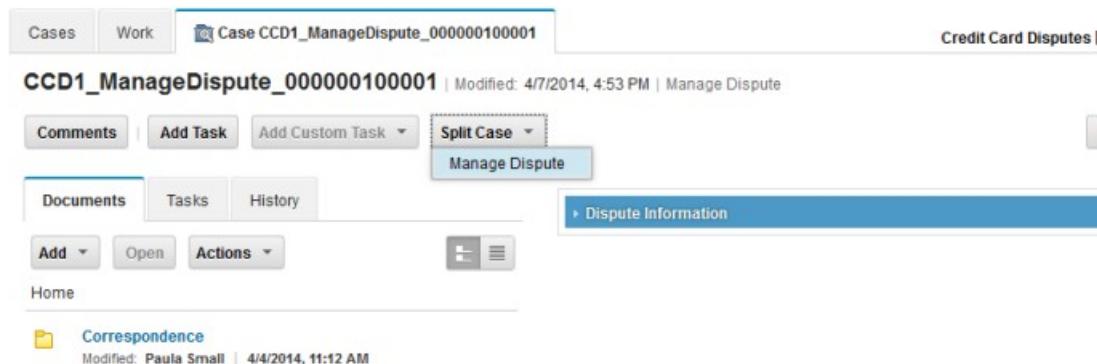
One of the features in the IBM Case Manager is the ability to split cases. “Split” may be a bit misleading, because what we are doing is more like creating a copy of a case, possibly omitting some of the original properties or documents.

The ability to split a case must be enabled at the Case Type level. In this exercise you will enable splitting of cases of the **Manage Dispute** case type of the **Credit Card Dispute** solution. This solution already has the Split Case page available to it. (The procedure to create the Split Case page is in the Information Center, in the discussion on upgrading solutions.)

Step	Action
------	--------

- 1 Search for an existing **Credit Card Dispute** solution case or create a new case from the Cases Page → Add Case → Manage Dispute. Fill in the details.

The Case Details page should be displayed, and this time, the Split Case button should be available. Click on **Split Case**. If a Case Type choice is presented, choose **Manage Dispute**.



- 2 The Split Case page is presented. At the top left is the Split Case Data widget, which displays the editable current case property values, and below that are the read-only values in the Original Case Data widget.

For the purposes of this exercise, change the value of a property in the Split Case Data widget, such as by adding “- Split” to the end of the Customer ID.

On the right, the Select Case Documents widget can be used to propagate case documents to the new case.

Click **Add** to split the case and create a new one.

- 3 Clicking Add should have caused the case to be split. If the Case Details page for the original case is not displayed, go there by clicking on the tab at the top. In the Case Information widget for that case, click on the **History** tab.

You should see an entry indicating that the case was split. (In the example below, the case has actually been split twice.)

CCD1_ManageDispute_000000100001 | Modified: 4/7/2014, 4:53 PM | Manage Dispute

[Comments](#) | [Add Task](#) | [Add Custom Task](#) | [Split Case](#)

[Documents](#)

[Tasks](#)

[History](#)

Show: [Summary](#) for: All

Today

- Case split into a new case 5:02 PM
P8Admin
CCD1_ManageDispute_000000110001
- a comment 4/4/2014, 11:33 AM
psmall
Comment added to Generate Correspondence task for Generate Letter
- Validate Merchant Number 4/4/2014, 11:30 AM
psmall
Task completed

Dispute Information

* Customer ID

12345

Due Date

3/3/2014

12:00 PM

Transaction ID

002-54321

* Transaction Amount

10,000

Case Status

Correspondence Type

Click **Close** to exit the Case Details page.

On the Cases tab, search for cases --- You should now see two work items, one work item for the split case, along with a work item for the original case. These would not be immediately distinguishable unless you changed a property value, as was suggested.

- 7 As a final test, click on the new work item created by the split. In the resulting Case Information widget, click on the **History** tab. Among the history entries, you should see one like the following:

[Documents](#)

[Tasks](#)

[History](#)

Show: [Summary](#) for: All

- Case created by splitting another case 5:02 PM
P8Admin
CCD1_ManageDispute_000000100001

