

Developing Case Management Solutions using IBM Business Automation Workflow V20.0.0.2

WB836G (Classroom)

(Self-paced)

Course description

This course provides technical professionals with the needed skills to develop Case Management solutions in IBM Business Automation Workflow.

The course begins with an introduction to IBM Business Automation Workflow (BAW). You learn about BAW capabilities, case management concepts, architecture, and the benefits of using IBM Business Automation Workflow on Cloud. You manage cases in the BAW Case Client.

You learn about the case solution design and build and deploy your first case solution. You export and import case solutions. You define various case objects such as properties, choice lists, roles, business objects, and case types. You create To-do Tasks and Container activities, and implement preconditions and Sets to manage activities. You create custom property views for case pages. You model BPM processes for case activities and create client-side human services. You create case stages and manage the stages manually and automatically with process JavaScript API.

This course teaches how to create custom pages and implement Free Form page layout and utility widgets. You configure the Calendar widget, subscribe to external calendars, and create and view quick tasks in the Calendar widget. You customize the toolbar and menu for a case page, wire two widgets together, and implement Script Adapter widgets to transform data.

This course teaches how to promote an existing case solution to a workflow project and to integrate an existing BPM process in a case solution. You create, apply, and export a security configuration for a case solution.

Through instructor-led presentations and hands-on lab exercises, you learn about the core features of IBM Business Automation Workflow case management.

For information about other related courses, see the IBM Training website: [**ibm.com**/training](ibm.com/training)

General information

Delivery method

Classroom or self-paced virtual classroom (SPVC)

Course level

ERC 1.0

Product and version

IBM Business Automation Workflow V20.0.0.2

Audience

This course is intended for case solution developers of IBM Business Automation Workflow.

Learning objectives

After completing this course, you should be able to:

* Describe the key capabilities of IBM Business Automation Workflow
* Understand the high-level architecture for IBM Business Automation Workflow (BAW)
* Identify the Workflow Center components
* Explain the Case management concepts
* Describe the benefits of using IBM Business Automation Workflow on Cloud
* Create, process, and split cases in BAW Case Client for an existing case solution
* Add documents and runtime activities to a case in BAW Case Client
* Understand the Case solution design
* Build and deploy a case solution
* Export, delete, and import a case solution
* Define properties, choice lists, roles, and business objects for a case solution
* Create document types and case types for a case solution
* Create To-do Task and Container activities
* Add the To-do list widget to the page
* Use Sets to manage tasks
* Create a custom property view
* Configure the display settings for properties
* Assign the custom property view to case pages
* Model a process for a case activity
* Create client-side human services
* Manage case stages manually and automatically with process JavaScript API
* Create custom pages and implement Free Form page layout and utility widgets
* Configure the Calendar widget and subscribe to external calendars
* Create and view quick tasks in the Calendar widget
* Customize the toolbar and menu for a case page
* Wire two widgets together
* Implement Script Adapter widgets to transform data
* Promote an existing case solution to a workflow project
* Integrating an existing process in a case solution
* Create, apply, and export a security configuration for a case solution

Prerequisites

* Familiarity with case management concepts
* Basic knowledge of programming techniques
* Understanding of JavaScript

Duration

5 days

Skill level

Intermediate

Notes

The following unit and exercise durations are estimates, and might not reflect every class experience. If the course is customized or abbreviated, the duration of unchanged units will probably increase.

This course replaces the following previous courses:

* IBM Case Manager Essentials (V5.3.2) (F2900G and F2909G)
* Build an IBM Case Manager Solution (V5.3.2) (F2910G and F2919G)
* Configure IBM Case Manager Security (V5.3.2) (F2920G and F2929G)
* Customize the IBM Case Manager Client User Interface (V5.3.2) (F2940G and F2949G)

Course agenda

|  |
| --- |
| Course introduction  Duration: 15 minutes |

|  |  |
| --- | --- |
| Unit 1. Introduction to IBM Business Automation Workflow  Duration: 1 hour and 30 minutes | |
| Overview | This unit is an overview of IBM Business Automation Workflow (BAW), its key capabilities, high-level architecture, and its primary components. It focuses on Case Management capability of BAW. |
| Learning objectives | After completing this unit, you should be able to:   * Describe the key capabilities of IBM Business Automation Workflow * Understand the high-level architecture for IBM Business Automation Workflow * Identify the Workflow Center components * Explain the Case management concepts * Describe the benefits of using IBM Business Automation Workflow on Cloud |

|  |  |
| --- | --- |
| Unit 2. Managing cases in IBM Business Automation Workflow Case Client  Duration: 60 minutes | |
| Overview | This unit describes what cases and roles are and introduces you to the Case Client for managing cases. |
| Learning objectives | After completing this unit, you should be able to:   * Describe cases and roles * Identify the IBM Case Manager Client User Interface elements * Learn about managing and splitting cases * Explain runtime tasks * Describe sample Case solution scenarios |

|  |  |
| --- | --- |
| Exercise 1. Managing cases in IBM Business Automation Workflow Case Client  Duration: 1 hour and 45 minutes | |
| Overview | In this exercise, you learn how to create, process, and split a case. You add documents, comments, and runtime activities to a case. You also monitor the case stages. |
| Learning objectives | After completing this exercise, you should be able to:   * Create, process, and split a case * Add documents to a case * Monitor case stages * Add runtime activities |

|  |  |
| --- | --- |
| Unit 3. Building and deploying a case solution  Duration: 45 minutes | |
| Overview | This unit explains the case solution design, IBM Workflow Center, and case solution creation and export. |
| Learning objectives | After completing this unit, you should be able to:   * Understand the case solution design * Describe IBM Workflow Center * Learn how to export case solutions |

|  |  |
| --- | --- |
| Exercise 2. Building your first Case solution  Duration: 30 minutes | |
| Overview | In this exercise, you build and deploy a simple case solution. You also export, delete, and import a case solution. |
| Learning objectives | After completing this exercise, you should be able to:   * Build and deploy a case solution * Export, delete, and import a case solution |

|  |  |
| --- | --- |
| Unit 4. Defining case solution objects  Duration: 60 minutes | |
| Overview | This unit describes the objects that make up a case solution. |
| Learning objectives | After completing this unit, you should be able to:   * Understand case solution objects * Learn about case properties, choice lists, and business objects * Describe roles, document classes, and case types |

|  |  |
| --- | --- |
| Exercise 3. Defining case solution objects  Duration: 1 hour | |
| Overview | In this exercise, you learn how to define objects such as properties, roles, document types, business objects, and case types for a case solution. |
| Learning objectives | After completing this exercise, you should be able to:   * Define properties, choice lists, roles, and business objects for a case solution * Create document types and case types for a case solution |

|  |  |
| --- | --- |
| Unit 5. Case Activities  Duration: 30 minutes | |
| Overview | In this unit, you learn about case activities, preconditions that you can use to start an activity, and how to use Sets to organize activities into groups. |
| Learning objectives | After completing this unit, you should be able to:   * Learn about activities * Describe preconditions * Understand Sets |

|  |  |
| --- | --- |
| Exercise 4. Creating case activities  Duration: 1 hour and 15 minutes | |
| Overview | In this exercise, you learn how to create To-do Task and Container activities. You also use Sets to manage the activities. |
| Learning objectives | After completing this exercise, you should be able to:   * Create To-do Task and Container activities * Add the To-do list widget to the page * Use Sets to manage tasks |

|  |  |
| --- | --- |
| Unit 6. Customizing Property Views  Duration: 45 minutes | |
| Overview | This unit describes the property views. You learn how to create custom property layouts, configure the display settings for properties, and assign the custom views to case pages. |
| Learning objectives | After completing this unit, you should be able to:   * Describe property views * Learn how to create property views for properties and business objects * Identify the display settings for properties * Understand how to assign a custom property view to case pages |

|  |  |
| --- | --- |
| Exercise 5. Customizing Property Views  Duration: 1 hour and 45 minutes | |
| Overview | In this exercise, you learn how to customize property views and assign them to case pages. You also learn how to configure the display settings for properties. |
| Learning objectives | After completing this exercise, you should be able to:   * Create a custom property view * Configure the display settings for properties * Assign the custom property view to case pages |

|  |  |
| --- | --- |
| Unit 7. Creating a case activity with a new process  Duration: 60 minutes | |
| Overview | This unit teaches you how to create a case activity with a new process, model a process in the IBM Process Designer, and design Client-side human services. It also describes the Process a claim scenario and shows you how to test the process in Case Client. |
| Learning objectives | After completing this unit, you should be able to:   * Learn about a case activity with a new process * List and describe the IBM Process Designer UI elements * Describe how to model a process * Understand Client-side human services * Describe the Process a claim scenario * Test the process in Case Client |

|  |  |
| --- | --- |
| Exercise 6. Creating a case activity with a new process  Duration: 2 hours | |
| Overview | In this exercise, you learn how to create a case activity with a new process, design the process workflow, and client-side human services. |
| Learning objectives | After completing this exercise, you should be able to:   * Configure a case type and add an activity with a new process * Model a process for a case activity * Create client-side human services * Test the case solution in Case Client |

|  |  |
| --- | --- |
| Unit 8. Managing case stages  Duration: 30 minutes | |
| Overview | This unit describes Case stages and teaches how to manage case stages manually and automatically. |
| Learning objectives | After completing this unit, you should be able to:   * Describe case stages * Learn how to manage case stages manually * Learn how to manage case stages automatically by using case operations |

|  |  |
| --- | --- |
| Exercise 7. Managing case stages  Duration: 1 hour and 15 minutes | |
| Overview | In this exercise, you learn how to create case stages, and manage them both manually and automatically by using process JavaScript API to do a case operation. |
| Learning objectives | After completing this exercise, you should be able to:   * Add stages to a case type in a case solution * Test the solution in Case Client and advance case stages manually * Configure the process workflow to advance case stages automatically |

|  |  |
| --- | --- |
| Unit 9. Designing custom Case pages  Duration: 1 hour | |
| Overview | In this unit, you learn what the case pages are and how to create custom pages and add widgets to your pages. You also learn how to create a Free Form page to design your own page layouts. |
| Learning objectives | After completing this unit, you should be able to:   * Describe case pages * Learn how to create custom pages and assign them to roles * Understand the Free Form page layouts and Widget Containers * Identify utility widgets |

|  |  |
| --- | --- |
| Exercise 8. Designing custom Case pages  Duration: 1 hour | |
| Overview | In this exercise, you learn how to create custom pages and add widgets to your pages. You also create a Free Form page to design your own page layouts. |
| Learning objectives | After completing this exercise, you should be able to:   * Create a custom Solution page * Create a page with Free Form page layout * Add utility widgets to your page |

|  |  |
| --- | --- |
| Unit 10. Working with the Calendar widget  Duration: 45 minutes | |
| Overview | In this unit, you learn what the Calendar widget is and how to configure the Calendar widget and subscribe to external calendars. You also learn how to create and view quick tasks in the Calendar widget. |
| Learning objectives | After completing this unit, you should be able to:   * Describe a Calendar widget * Understand how to subscribe to external calendars * Learn how to create and view quick tasks in Calendars * Learn about the Show Calendar action |

|  |  |
| --- | --- |
| Exercise 9. Working with the Calendar widget  Duration: 1 hour and 30 minutes | |
| Overview | In this exercise, you learn how to configure the Calendar widget and subscribe to external calendars. You also create and view quick tasks in the Calendar widget. |
| Learning objectives | After completing this exercise, you should be able to:   * Configure the Calendar widget and subscribe to external calendars * Create and view quick tasks in the Calendar widget * Add the Show Calendar action to the toolbar * Use the Calendar widget in the Free Form page layout |

|  |  |
| --- | --- |
| Unit 11. Customizing the case toolbars and menus  Duration: 30 minutes | |
| Overview | This unit teaches you how to customize the case toolbar and menus to implement actions. |
| Learning objectives | After completing this unit, you should be able to:   * Learn how to customize the case toolbar to implement actions * Understand how to add a custom action as a menu item |

|  |  |
| --- | --- |
| Exercise 10. Customizing the case toolbars and menus  Duration: 45 minutes | |
| Overview | In this exercise, you learn how to customize the toolbars and menus to add actions for a case solution. |
| Learning objectives | After completing this exercise, you should be able to:   * Customize the toolbar for a case page * Add menu items to a case page |

|  |  |
| --- | --- |
| Unit 12. Wiring widgets  Duration: 30 minutes | |
| Overview | This unit describes widgets and teaches you how to wire two widgets together and implement Script Adapter widgets. |
| Learning objectives | After completing this unit, you should be able to:   * Describe Widgets * Learn how to wire two widgets together * Understand how to implement Script Adapter widgets |

|  |  |
| --- | --- |
| Exercise 11. Wiring widgets  Duration: 45 minutes | |
| Overview | In this exercise, you learn how to wire two widgets together and how to use a Script Adapter widget to transform data. |
| Learning objectives | After completing this exercise, you should be able to:   * Wire two widgets together * Implement Script Adapter widgets to transform data |

|  |  |
| --- | --- |
| Unit 13. Promoting an existing case solution  Duration: 15 minutes | |
| Overview | In this unit, you learn how to promote an existing case solution to a workflow project. |
| Learning objectives | After completing this unit, you should be able to:   * Describe how to promote an existing case solution to a workflow project |

|  |  |
| --- | --- |
| Exercise 12. Promoting an existing case solution  Duration: 45 minutes | |
| Overview | In this exercise, you learn how to promote an existing case solution to a workflow project. You create case activities that use IBM Business Automation Workflow processes. |
| Learning objectives | After completing this exercise, you should be able to:   * Promote an existing case solution to a workflow project * Create case activities that use IBM Business Automation Workflow processes |

|  |  |
| --- | --- |
| Unit 14. Integrating an existing process in a case solution  Duration: 30 minutes | |
| Overview | This unit explains how to integrate an existing BPM process in a case solution. |
| Learning objectives | After completing this unit, you should be able to:   * Examine a process app * Learn how to integrate an existing process * Describe the testing of the process integration |

|  |  |
| --- | --- |
| Exercise 13. Integrating an existing process in a case solution  Duration: 45 minutes | |
| Overview | In this exercise, you learn how to integrate an existing BPM process in a case solution. |
| Learning objectives | After completing this exercise, you should be able to:   * Create a case activity and integrate an existing process |

|  |  |
| --- | --- |
| Unit 15. Configuring security for a case solution  Duration: 45 minutes | |
| Overview | This unit describes the case solutions security and teaches how to create, export, and import security configurations. |
| Learning objectives | After completing this unit, you should be able to:   * Describe the case solutions security * Understand how to create security configurations * Learn how to export and import security configurations |

|  |  |
| --- | --- |
| Exercise 14. Configuring security for a case solution  Duration: 30 minutes | |
| Overview | In this exercise, you learn how to create a security configuration for your case solution and export it to a file to be used on a different system. |
| Learning objectives | After completing this exercise, you should be able to:   * Create a security configuration * Export a security configuration |

|  |  |
| --- | --- |
| Unit 16. Course summary, badge, and other learning resources  Duration: 30 minutes | |
| Overview | This unit summarizes the course and provides badges and other information for future study. |
| Learning objectives | After completing this unit, you should be able to:   * Describe the course objectives and what you learned * Earn a badge for this course * Identify and describe product certifications that are related to this course * Identify resources that can help you learn more |

For more information

To learn more about this course and other related offerings, and to schedule training, see **ibm.com**/training

To learn more about validating your technical skills with IBM certification, see **ibm.com**/certify

To stay informed about IBM training, see the following sites:

IBM Training News: http://bit.ly/IBMTrainEN

YouTube: youtube.com/IBMTraining

Facebook: facebook.com/ibmtraining

Twitter: twitter.com/websphere\_edu