



IBM Case Manager 5.2 Solution Deployment Guide Part 3

Selected External Assets Migration and Deployment

Abstract

This guide, presented as a series of articles, focuses on the steps and tools used to migrate and deploy an IBM Case Manager solution from one environment to another. It is intended to augment the information available in the IBM Case Manager and FileNet P8 Information Centers. Throughout this guide, links are provided to Information Center topics. Review of the topics is strongly recommended.

The first article in this series, *Part 1: Basic Solution Migration and Deployment*, provides an overview of the entire solution migration and deployment process as well as procedures for migrating a solution with only IBM Case Manager assets. Also in the Part 1 appendix is a quick reference checklist for the entire process as presented by all the articles in the complete Solution Deployment Guide.

The second article, *Part 2: Advanced Solution Migration and Deployment*, builds upon Part 1 to encompass the larger solution application including other FileNet P8 assets.

The final article, *Part 3: Selected External Assets Migration and Deployment*, uses the solution application migration and deployment model outlined in the first and second articles but illustrates by example how two of the other IBM and external assets are managed.

Revision 1.0

Contents

- Migration and Deployment Overview.....3**
 - Introduction.....3
 - Solution application migration model hybrid.....4
- Prepare.....6**
 - Identify and document external solution application assets.....6
- Migrate.....9**
 - Export from source environment.....9
 - Package custom widget.....10
 - Task 5 - Export IBM Content Navigator desktop.....10
 - Prepare to import into destination environment.....14
- Deploy.....14**
 - Task 9a - Deploy and register widgets.....14
 - Deploy solution.....18
 - Task 9b - Import desktop.....18
- Configure.....20**
 - Task 10 - Register target environment on desktop.....21
 - Task 9c - Complete IBM Content Navigator desktop configuration.....22
- Putting it all together.....28**
- Appendices.....29**
 - Document Conventions.....29
 - References and Acknowledgements.....30

Overview

Migration and Deployment Overview

Introduction

The first article in this series, *Part 1: Basic Solution Deployment and Migration*, provides an overview of the entire solution migration and deployment process as well as procedures for migrating a solution with only IBM Case Manager assets. The second article, *Part 2: Advanced Solution Deployment and Migration*, builds upon Part 1 to encompass the larger solution application including other FileNet P8 assets. The reader should review Parts 1 and 2 prior to reading this third article. Also in the Part 1 appendix is a quick reference checklist for the entire process as presented by all the articles in the complete Solution Deployment Guide.

In this third article, Part 3 of the guide, the focus is a sample scenario demonstrating the additional tasks needed to migrate and deploy a widget package and customized IBM Content Navigator desktop. These are two examples of assets that are integrated with the solution but developed externally from the Case Manager Builder or other FileNet P8 design tools.

The following graphic reflects migrating and deploying from a development environment to a non-development environment using a variety of tools. The numbered bubbles reflect a typical order of operation.

- As presented in Part 1 of the deployment guide, steps 1, 2, 6, 10, and 11 are required for the migration and deployment of any solution. Steps 3 and 7 are typically included as well. Operations are performed using the IBM Case Manager administration client.
- Part 2 showed the tasks associated with steps 4 and 8 using the tools FileNet Deployment Manager and Process Configuration Console. It also discussed how step 10 could be before step 8 if an external dependency in the FileNet Deployment Manager deploy package requires the solution be deployed before the deploy package contents can be imported. Thus step 8 might be needed multiple times at different points in the migration and deployment process depending on how the other FileNet P8 assets are related to the solution and to each other.

- Part 3 includes two examples demonstrating additional assets whose migration is illustrated in steps 5 and 9.

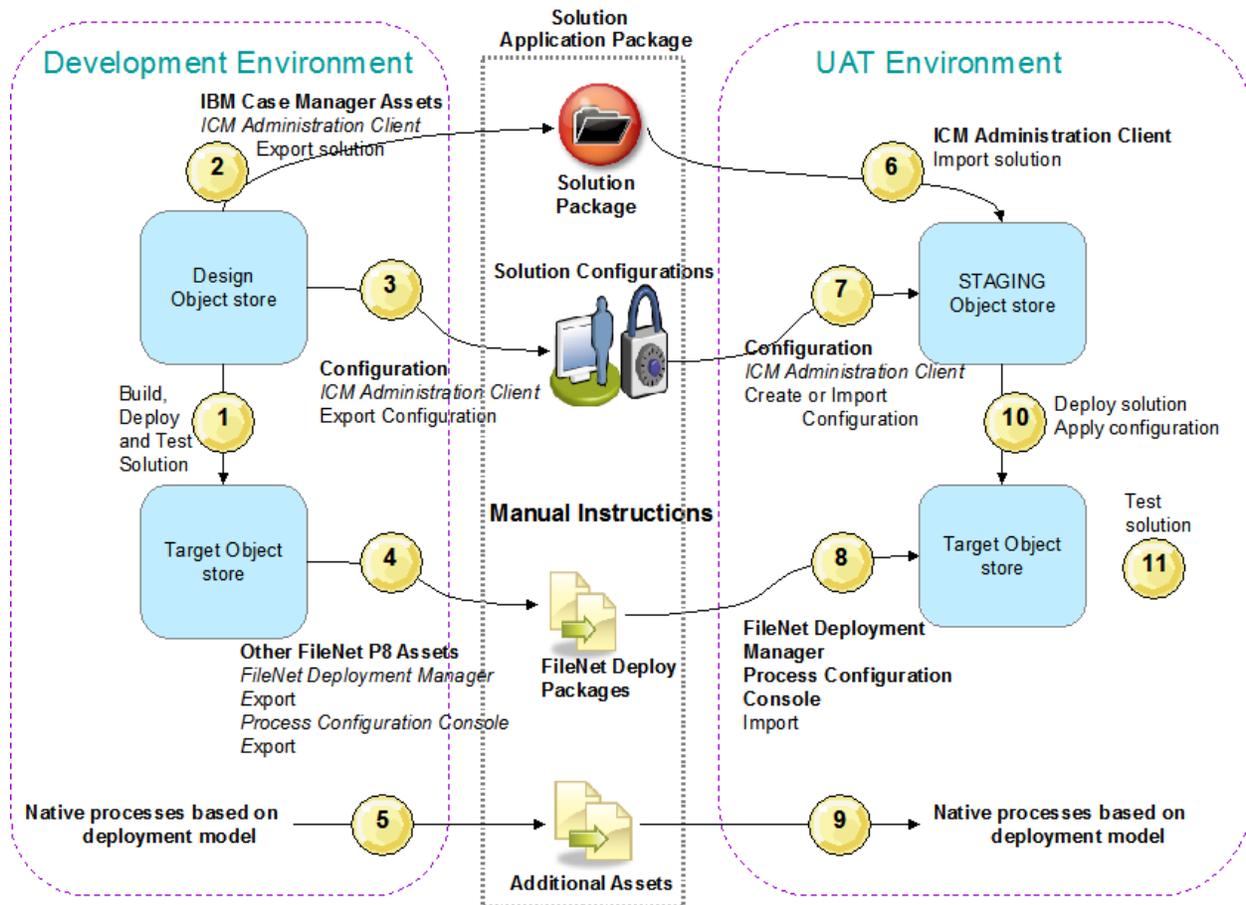


Figure 1 High-level process: solution application migration DEV to UAT

IBM Case Manager Solution Deployment Guide Part 3: Selected External Assets Migration and Deployment, through example, illustrates how *additional assets* could be managed. This third article documents the steps to migrate and deploy a solution with a custom widget. Also shown is migrating an IBM Content Navigator desktop with a customized look and feel designed to support the solution. These examples demonstrate the types of additional tasks needed to migrate other external assets integrated into the solution application and how the IBM Case Manager configuration tool assists in the process.

Solution application migration model hybrid

As described in Part 1 of this series, the IBM Case Manager solution migration model treats the development environment as the “single source” for the core solution application. Migration of IBM Case Manager assets always begins in the development environment. Migration and deployment of FileNet P8 assets used in a solution might originate in the development or user acceptance test environments following a traditional P8 application migration model. This was discussed in Part 2 of this series.

External assets tightly coupled to the run-time operation of the solution, like the custom widget used in the example in this article, would typically follow the solution migration model and be taken from the development environment. However another part of the configuration that is loosely coupled, like the look and feel of the desktop, could be migrated with its containing assets from the development or user acceptance test environment to the production environment.

Thus the migration of a complete solution application, including one with other IBM and external assets, can utilize both the solution migration and traditional application migration models. This next figure shows the hybrid approach as a graphical representation.

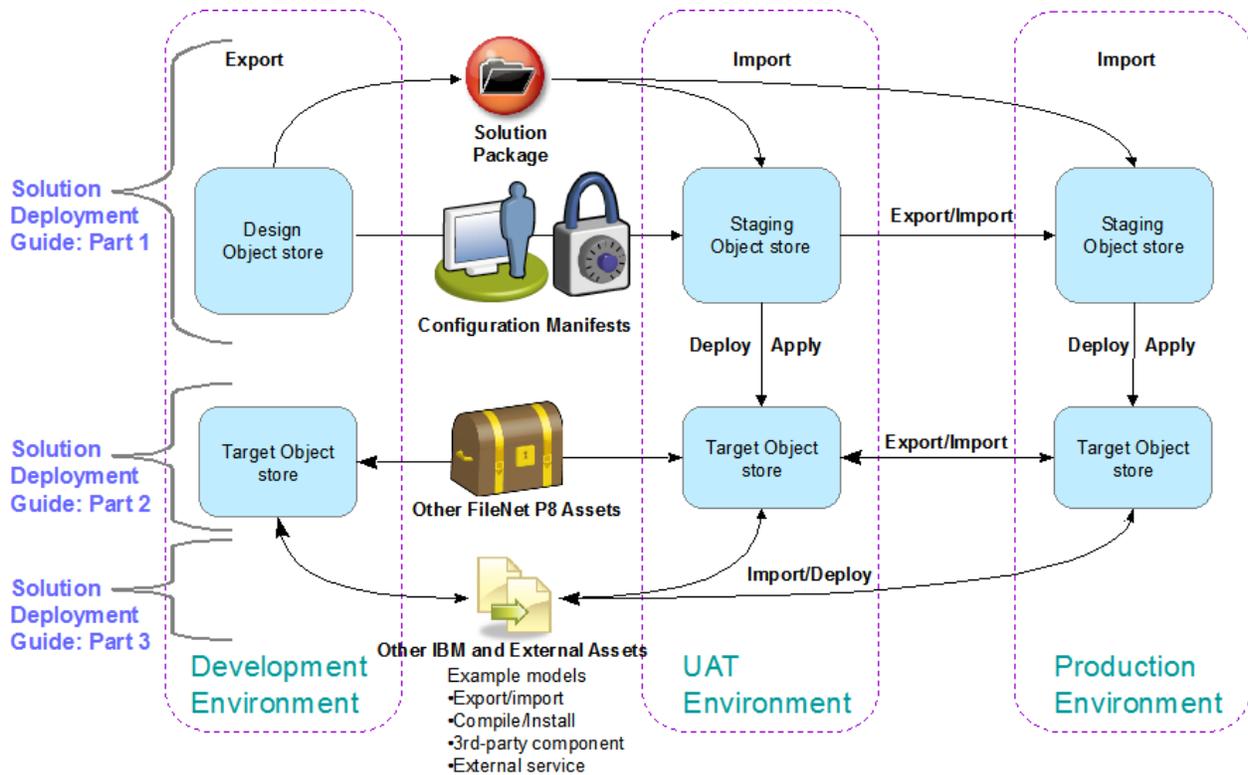


Figure 2 Advanced solution application migration

The tasks and procedures given in this article present the migration of a custom widget integrated onto an IBM Case Manager solution page. The procedures also show how to export/import the IBM Content Navigator desktop look and feel that may have been developed to support the solution at run-time.

Phase 1

Prepare

Identify and document external solution application assets

During the solution design and development phase, it is important to create and maintain a solution application package and supplemental material representing a listing of all assets in the entire solution application. As a part of this, information to assist in the application migration and deployment process must be included.

Note:

For an overview of assets related to the solution package, review the IBM Case Manager 5.2 Information Center topic "[Identifying solution assets for migration](#)".

For a comprehensive discussion of migration and deployment instructions preparation, review the IBM Case Manager 5.2 Information Center topic "[Preparing customized migration and deployment instructions](#)".

The remainder of this article assumes the reader has reviewed and is familiar with the concepts and terms introduced by these topics as well as Part 1 and Part 2 of this series.



The last category of assets to illustrate the migration and deployment of is called *other IBM and external assets*. This term refers to assets developed outside of IBM Case Manager and FileNet P8 tools. The following table provides a summary of which assets are other IBM and external assets.



The following table contains information on:

Type: Short description or name of asset

Defined using: Tool used to design the asset

Resides in: Where the asset used in the solution deployment is kept in the development environment, for example the Design Object Store (DOS) or the object store for the Case Manager target environment (Target Object Store, TOS).

Migration tool: Used to export/import the asset to move between environments.

Deployment tool: Used to deploy the asset into the target environment.



Solution asset	Defined by using	Resides in	Migration tool	Deployment tool
IBM Content Manager item types	IBM Content Manager system administration client	IBM Content Manager library server	IBM Content Manager system administration client	IBM Content Manager system administration client
IBM Content Navigator desktop	IBM Content Navigator	IBM Content Navigator configuration database	IBM Content Navigator administration tool	IBM Content Navigator administration tool
*IBM Operational Decision Manager rules project (formerly known as WebSphere ILOG JRules BRMS)	IBM Operational Decision Manager Rule Designer	IBM Operational Decision Manager Decision Center		
Reused IBM Business Process Manager processes	IBM Business Process Manager Process Designer	Process center, Process server	Process center administration tool	Process center administration tool
IBM Content Analytics with Enterprise Search	IBM Content Analytics with Enterprise Search administration console	File	IBM Content Analytics with Enterprise Search administration console	IBM Content Analytics with Enterprise Search administration console
Case Analyzer	Process Task Manager	OLAP database	Process Task Manager	Microsoft SQL Server OLAP Services
Cognos® Real-time Monitoring	Cognos Real-time Monitoring Workbench	Database for Cognos Real-time Monitoring	Cognos Real-time Monitoring Workbench	
Custom widget	External tool (example: Rational Application Developer)	External tool	External tool	IBM Case Manager configuration tool or administration client IBM Content Navigator administration tool Application Server's administration console
External Data Service	External tool	External tool	External tool	External tool

Solution asset	Defined by using	Resides in	Migration tool	Deployment tool
Email templates that are checked in as documents		Target object store		FileNet Deployment Manager

Figure 3 Other IBM and external assets

* Refers to rules maintained outside the solution definition. Embedded *business rules* created directly in Case Manager Builder are migrated and deployed with the solution using IBM Case Manager tools.

The tasks in this article will focus on two asset types from the above table by using examples from a sample scenario and solution:

- The example solution includes a custom search widget incorporated onto one of its pages. If you are interested in this widget, see “[References and Acknowledgements](#)” for the link to the developerWorks article with the sample.
- The case worker utilizing the solution will be directed to use an IBM Content Navigator desktop named claimsDESKTOP. That desktop presents a look and feel meeting corporate standards, logos appropriate for the business, and access to two desktop features:
 - **Cases:** The solutions presented for the case worker to access are constrained to the IBM Case Manager target environment associated with the desktop and potentially governed by security on the solution itself. The Case Manager Client *Cases* feature is also configured to be the default desktop feature.
 - **Browse:** Another repository in the environment that is not an IBM Case Manager enabled object store holds reference documents. The case worker may browse this object store for information while processing a case.

Given the above fictitious situation, the additional assets from that sample scenario are:

- A widget package.
- An IBM Content Navigator desktop configuration.

The techniques shown for those two asset types present by example some considerations when using native tools to migrate other IBM or external assets for use with a solution application. The actual tooling and steps will differ depending on the asset being migrated and how it is used in the solution application. In general, the things to consider are:

- Does the migration of the other IBM or external asset explicitly or implicitly also migrate assets created in the Case Manager Builder or FileNet P8 design tools?

Assets should be migrated and deployed using the tooling native to the component owning the design or definition of the asset. Any IBM Case Manager or other FileNet P8 asset should be excluded from the export of other IBM or external assets.

- Does the deployment of the solution or the other FileNet P8 assets depend on the prior deployment of the external asset? Conversely does the migration of the other IBM or external asset include references to assets created by the solution or the other FileNet P8 assets migration and deployment?

The dependencies between the assets must be examined and a proper order of operation determined. Assets not dependent on other elements are typically migrated first. Then assets with dependencies are migrated in the order dictated by those dependencies. The migration and deployment documentation for the particular asset should include a discussion of prerequisites and dependencies.

- What are the ramifications for re-migrating a particular asset?

The *Prepare* phase should include a determination of what actions could be required in the *Deploy* and *Modify and Verify* phases to account for a re-migration. Documentation for the particular asset should include a discussion of the limitations and impact of re-migrating an asset.

With some assets, the best practice may be to remove the asset from the destination so the migration is not an update but a creation. For example, with deployed code to support a custom widget, it is best to uninstall the widget from the destination and clear all the caches so the migration is fresh instance of the new code. However arranging for an import to create a fresh instance is not always desirable or even possible.

Phase 2

Migrate

Export from source environment

To ensure a consistent version of the application is packaged, freeze development activities for application to be migrated while the assets are being exported.



The 'freeze' is accomplished by coordination between the users in the development environment and the administrator performing the export. Project planning and procedures should include how such a freeze will be communicated.

For versions of the assets originally migrated with the solution application for testing, it is common to reuse the same asset packages when migrating to the production environment. This ensures the integrity of the solution application that is migrated to the production environment. The example custom widget package is treated as a tightly coupled component. It would be included with the solution application package created in the development environment.

For the loosely coupled custom desktop in this example, the export could originate in the development environment. Or the customization could occur as a part of the user acceptance test activities. In that case, the customized desktop would be exported from the user acceptance test environment.

A discussion of the dependencies for IBM Content Navigator assets can be found in the Redbook for IBM Content Navigator for 2.0.0 "[Customizing and Extending IBM Content Navigator](#)", the topic "Component deployment". Note that many of the considerations discussed in the Redbook are addressed by the new export and import desktop configuration operations available in IBM Content Navigator 2.0.2.

The remaining sections of this article describe the specific processes to export and import the example customized IBM Content Navigator desktop, and perform required post-deployment configuration changes to support that and the custom widget package used for the example solution in this article.

Package custom widget

The custom widget package will typically be passed to the solution administrator to deploy as a part of the solution package. The solution developer will have created a custom widget package using procedures described in these sources:

Overview:

IBM Case Manager 5.2 Information Center "[Creating custom page widgets and actions](#)".

Procedures:

developerWorks "[ICM52 Custom Widgets](#)".

developerWorks "[Converting a Custom Search Widget from ICM 5.1.1 to ICM 5.2](#)".

Task 5 – Export IBM Content Navigator desktop

When you select a desktop to export, the viewer map, menus, and mobile application features that are associated with the desktop are automatically exported with that desktop. You can also include the following configuration components when you export a desktop:

- The list of users and groups who are authorized to use the desktop

- The repositories that are associated with the desktop
- The plug-ins that are associated with the desktop

Because the source environment and the target environment usually reside in different domains, the authorized users and groups, and the repositories will not typically be included in the export of the desktop definition. The following example procedures show how to exclude those elements.

The IBM Case Manager plug-ins as well as the plug-in for the custom widget are configured using IBM Case Manager configuration tool tasks and will be excluded from the desktop export as well.

For more information about the export operation in IBM Content Navigator, see “[Migrating desktops](#)” in the FileNet P8 5.2 Information Center.

Step	Action
1	<p>Log in to the IBM Content Navigator administration tool using the URL <code>http://<ICMserver_host:ICMserver_port>/navigator/?desktop=admin</code></p> <p>For example, the default URL when using IBM WebSphere as the application server is: <code>http://localhost:9080/navigator/?desktop=admin</code></p> <p>For example, the default URL when using Oracle WebLogic as the application server is: <code>http://localhost:7001/navigator/?desktop=admin</code></p>

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

2 Navigate to and open the **Desktops** tab.

Select the desired desktop, in this example claimsDESKTOP .

Select the Export button to launch the **Export Desktop** wizard.

In the **Export Desktop, Desktops** tab,

- Enter an appropriate **File name** for the exported data.



Recommendation is to use a file name that describes the version of the desktop configuration being exported using the current date, a version designation, or some other labeling that can later identify this configuration when it is copied to another system for import.

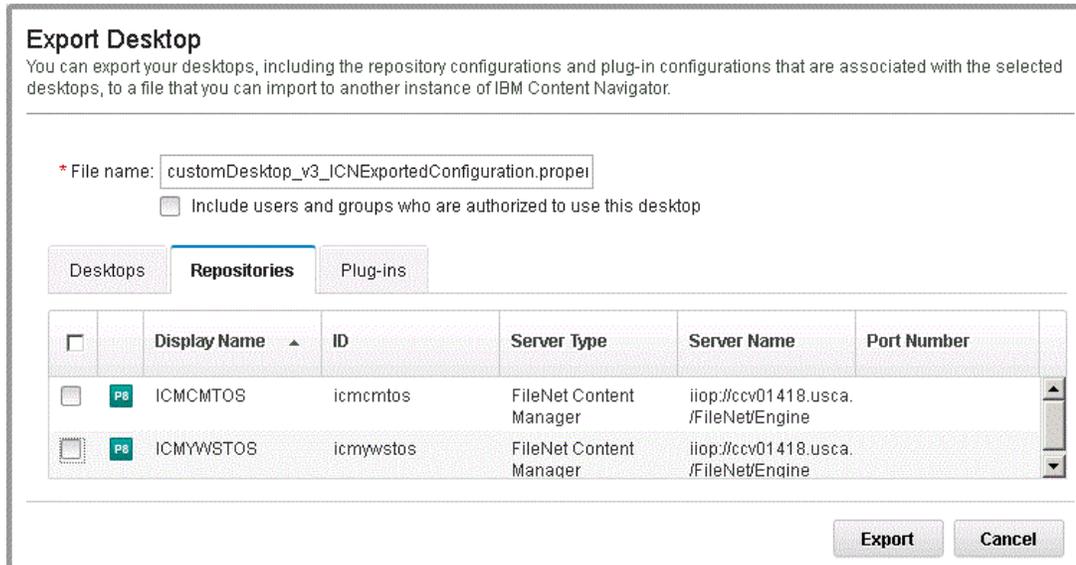
- Ensure the desired desktop is marked.
- Verify the check box for **Include users and groups ...** is not checked.

The screenshot shows the IBM Content Navigator interface. The 'Desktops' tab is selected in the left sidebar and highlighted with a red box. The main area shows a list of desktops with the 'Export' button highlighted in red. An 'Export Desktop' dialog box is open, showing the 'Desktops' tab. The 'File name' field contains 'customDesktop_v3_ICNExportedConfiguration.properties'. The checkbox 'Include users and groups who are authorized to use this desktop' is unchecked and highlighted with a red box. Below this is a table with columns 'Name', 'ID', and 'Description'. The table contains one row for 'claimsDESKTOP' with ID 'claimsDESKTOP' and description 'Custom desktop for claims solutions processing'. The 'Export' and 'Cancel' buttons are at the bottom right.

Name	ID	Description
claimsDESKTOP	claimsDESKTOP	Custom desktop for claims solutions processing

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

- 3 Switch to the **Export Desktop, Repositories** tab, deselect all the repositories associated with this desktop whose definition should not be migrated with this desktop configuration. Use the check box in the first column of the header row to deselect all in one click.



- 4 Switch to the **Export Desktop, Plug-ins** tab, deselect all the plug-ins associated with this desktop. Use the check box in the first column of the header row to deselect all in one click.

Click **Export** to start the export process.

When prompted to open or save the file, save it to a well-known location.

The wizard closes when the export process is complete and the file was downloaded to the specified well-known location.



Prepare to import into destination environment

To facilitate getting the destination system back online as soon as possible, it is important to complete as many tasks as possible before the *Deploy* phase begins. Generally copying the asset to the destination environment is a minimum and necessary step that can be performed without affecting the running system. This would be the case for the example custom widget package and exported custom desktop configuration.

Additionally for the exported desktop configuration in this scenario, the non-IBM Case Manager repository used to hold reference information would be configured in IBM Content Navigator using the IBM Content Navigator administration tool. This repository will be added later to the custom desktop after it is imported. The plug-ins will be configured using IBM Case Manager tools. Those tasks are detailed below in the *Deploy* phase.

For more information on IBM Content Navigator features and configuration, see the FileNet P8 5.2 Information Center topic “[Configuring the IBM Content Navigator web client](#)”.

Phase 3

Deploy

As described in part 1 and part 2 of this solution deployment guide, the additional tasks to deploy the solution and its associated other FileNet P8 assets would be completed at this time.

Task 9a – Deploy and register widgets

For a custom widget to be deployed with an IBM Case Manager solution, the widget package must be registered with the IBM Case Manager server and registered as a plug-in with IBM Content Navigator server in the target environment. Additionally the widget code must be available to the solution in the run-time environment.

If the widget is small, deploying only a JAR file may be sufficient. In this case, the IBM Case Manager administration client Widget Packages wizard **Register Custom Widgets** can be used.

That wizard will register a widgets package with the IBM Case Manager server, and register the plug-in for the widgets package with the IBM Content Navigator server. The wizard will also place the JAR file in the widgets package onto the shared network directory specified when the IBM Case Manager server for the target system was setup.

If the widget is larger, or the widget is deployed as part of a collection, then an EAR file is required. The IBM Case Manager configuration tool task **Deploy and Register Widgets Package**, in addition to performing the registration operations, will deploy the EAR file in the widgets package to the web application server. This task can be run through the user interface or incorporated into a scripted deployment process using the command-line interface.

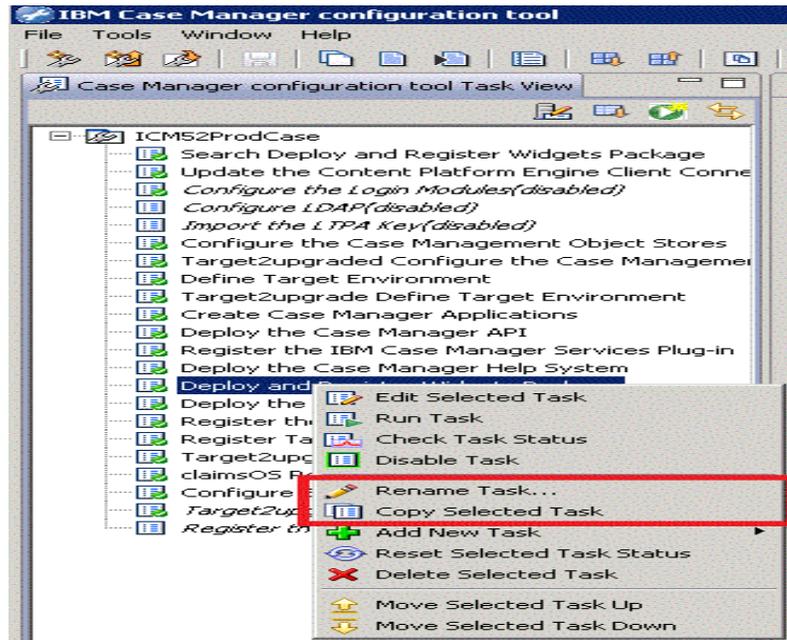
For more information about running tasks with the command-line interface, see "[Configuring the production environment by using the command line](#)" in the IBM Case Manager 5.2 Information Center.

This section will outline the procedure to use the IBM Case Manager configuration tool to run the **Deploy and Register Widgets Package** task for the custom widget.

Step	Action
1	Launch the Case Manager Configuration Tool for IBM Case Manager 5.2 on the target system.
2	Use File > Open Profile... to open the profile used to administrator the target system.
3	Right-click on the task originally used to register the out of the box IBM Case Manager widgets. By default the task is called Deploy and Register Widgets Package . Use Copy Selected Task action to create a copy. Right-click on the newly created copy and select Rename Task to assign it an relevant name. For example <i>Deploy and Register Custom Widget</i>

 If a new task is used with each widget deployed, tasks in the configuration tool become a record of operations performed on the target environment. Also tasks can be reused without modification if the widget needs to be redeployed in the future. Creating a copy of an existing task avoids reentry of data that is the same for each widget deployed to this target environment.

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

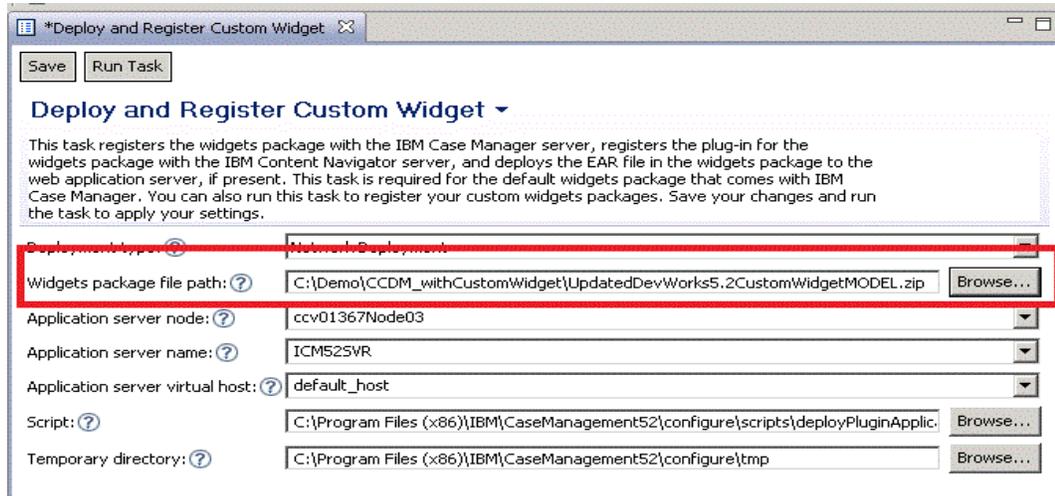


4 Right-click and select **Edit Task** on the copied and renamed task that will be used to deploy and register the custom widget.

- 5** On the *Deploy and Register Custom Widget* dialog (this dialog will use the name you assigned to the task),
- Ensure all the information about the application server to deploy the widget to is correct.
 - For the **Widgets package file path** , enter the fully qualified name or use the **Browse** to navigate to and select the widget package .zip file provided as a part of the solution application package to be deployed.
-

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

6 Save and Run Task to complete the operation.



7 Wait for the console messages at the bottom right of the user interface to indicate success. Do not close the configuration tool as more operations follow using the configuration tool.

8 Verify the widget was properly deployed and is started by examining the information in the application server administration console.

For example, if using WebSphere Network Deployment, the **WebSphere Enterprise Applications** can be examined. The name for the deployed application depends on the contents of the widget package. In this fictitious system, the name used was ICMCustomWidgets but this is arbitrary.



The application representing the deployed widget package may need to be manually started the first time it is deployed.



Deploy solution

As a part of solution deployment, a target environment to host that solution is chosen. When you register a target environment, you select the IBM Content Navigator desktop that you want to use to access solutions hosted in the target environment. A target environment can be registered against more than one IBM Content Navigator desktop making a solution accessible from more than one desktop. Ultimately the security applied to the solution as a part of its configuration will control the access to it.

For detailed steps on how to deploy a solution and information about migrating and configuring security for a solution deployment, see the developerWorks article "[IBM Case Manager 5.2 Solution Deployment Guide Part 1: Basic Solution Deployment and Migration](#)".

In the example of this article, the solution is deployed to a target environment that will be later registered against the migrated custom desktop. Thus when the custom desktop is accessed by a case worker, that solution can be opened by the case worker with access rights to the solution using the look and feel migrated with the custom desktop's configuration from the source environment.

Task 9b – Import desktop

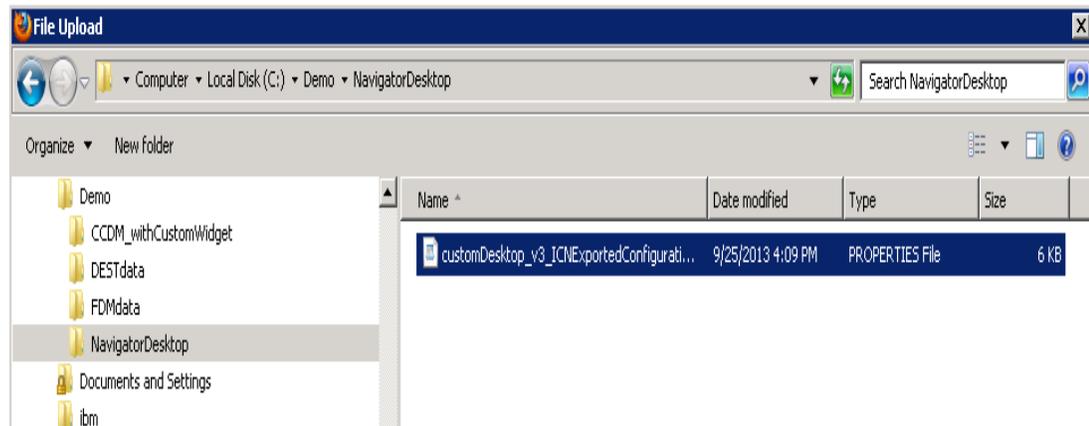
As stated in the IBM Content Navigator documentation, import desktop does not support a merge option. If a configuration object with the same ID already exists on the destination server, it can either be overwritten or excluded from the import leaving the destination object untouched:

- To overwrite an item on the destination with the items from the source, select the configuration object from the list of conflicting items in the Import Desktop window.
- To leave an existing item on the destination, leave the configuration object from the list of conflicting items unselected in the Import Desktop window.

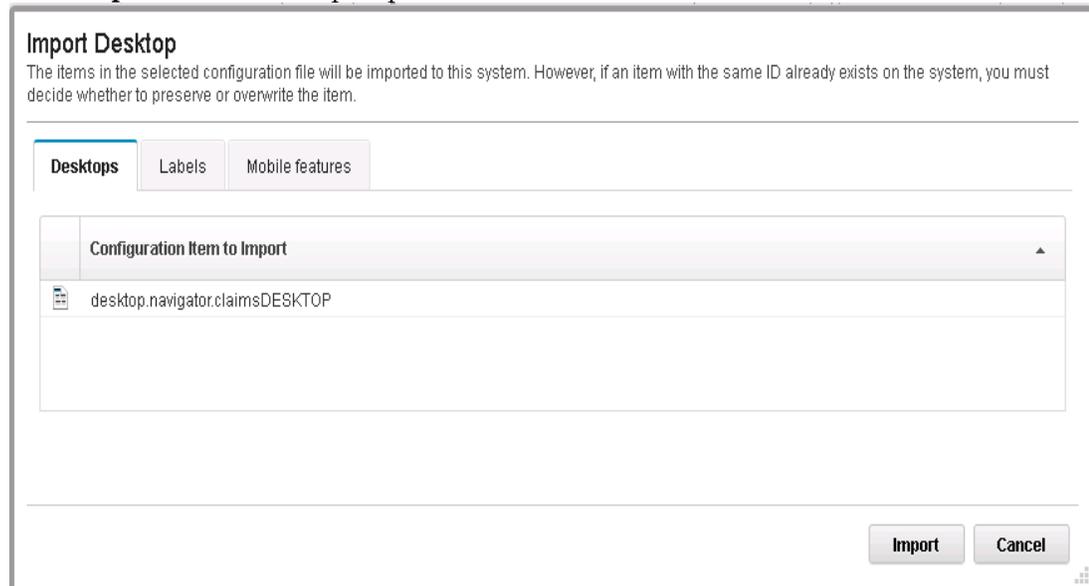
In this article's example, the import will create the desktop and since the export excluded the other IBM Content Navigator assets such as repositories and plug-ins, no conflicting items are present.

Step	Action
1	If needed, log in to the IBM Content Navigator administration tool as previously described.
2	Navigate to and open the Desktops tab. Select the Import button to launch the Import Desktop wizard.
3	Use the File Upload dialog presented to navigate to the file containing the exported desktop configuration.

Step Action

Click Open

-
- 4** On the **Import Desktop** dialog, confirm the expected desktop appears as the **Configuration Item to Import**. Click **Import** to start the import process.



-
- 5** Confirm success by reviewing the information on the Desktop Import Summary dialog that appears when the import process is complete.
-
- 6** Use the **Download Report** button to view the details and save the results of the import for later use in auditing or troubleshooting activities.
-
- 7** When returning to the **Desktops** tab, note the newly imported desktop shows an icon indicating it is an **Invalid desktop** . This will be corrected in later tasks.
-

Step Action

Desktops

You can create multiple desktops to give different users access to the content they need. For example, you can create a desktop that only allows users to search for content or a desktop that gives users access to a single repository.

New Desktop

Edit

Copy

Delete

Refresh

Export

Import

Close

Name contains

	Name ▲	ID	Default Desktop	Description
	Admin Desktop	admin	Yes	Desktop for users with administrative privileges
	Case Manager	icm	No	Default desktop for Case Manager Client
	Case Manager administration	icmadmin	No	Default desktop for Case Manager administration client
	claimsDESKTOP	claimsDESKTOP	No	Custom desktop for claims solutions processing



Phase 4

Configure

When the desktop configuration was exported from the source, the repository configurations were not exported. This choice was made because much of the repository information including names, access URLs, and connection information are likely different in the destination system. And in keeping with the rule-of-thumb to let native tools do the configuration operation, the IBM Case Manager configuration tool will be used to configure the target environment as a repository in IBM Content Navigator and not the desktop migration.

Also in the sample scenario, another repository that is outside the IBM Case Manager environment will be used with the imported claimsDESKTOP. In the scenario, that repository was previously created, populated, and defined in the *Prepare* phase of the solution application migration. The external repository name is “References”. It must be manually associated with the imported claimsDESKTOP.

These plus other additional configuration items like utilizing the security features in IBM Content Navigator to limit which users and groups access the desktop could be configured as a part of this phase. Details on these configuration requirements would be captured in the *Prepare* phase as a part of the solution application migration and deployment instructions.

Task 10 – Register target environment on desktop

This task will register the target environment to which the solution was deployed. The operations completed as a part of the registration task include:

- Configuring the target object store for the specified target environment as a repository in the IBM Content Navigator
- Registering that repository with and add the IBM Case Manager features to the imported custom IBM Content Navigator desktop used for the example. These operations allow the migrated custom desktop to be used with the IBM Case Manager solution via the Case Manager Client feature.
- Configuring the Case Operations component queue and target environment's isolated region to work with solution workflows.

You can register target environments for a test environment or production environment by using the IBM Case Manager configuration tool or administration client. The first time the configuration tool is run to configure the production environment after IBM Case Manager is installed, at least one target environment must be defined and registered. Later, the administration client is typically used by the solution or system administrators to iteratively define additional target environments as needed to support the solutions.

However in this article, since the configuration tool was used previously to register and deploy the custom widget, the configuration tool will be used in the following procedure.

For more information about using the administration client to register a target environment, see “[Defining and registering target environments](#)” in the IBM Case Manager 5.2 Information Center.

Step	Action
1	Back in the IBM Case Manager configuration tool, right-click on task originally used to perform the Register Target Environment operation for the intended target environment and selection the operation Edit Selected Task .

 If the procedures to create the target environment did not previously create

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

this task, then create a new task now.

On the Register Target Environment dialog,

- For **Target environment**, select the environment the solution was deployed to.
- From the **Desktop name** pull-down, select the imported desktop.
- Verify or supply the appropriate values for the **Case operations user name** and **password**.



2 Save and Run Task.

3 Wait for the console messages at the bottom right of the user interface to indicate success.

4 The results of this task will be seen in the next section where the configuration of the IBM Content Navigator desktop is completed.

Work with the IBM Case Manager configuration tool is complete and the program may be closed using **File > Exit** .

Task 9c – Complete IBM Content Navigator desktop configuration

Because the source environment and the target environment are different, additional configuration is often required before the imported desktop is usable.

Some common issues and resolutions are described in the following table. For more information about the import operation in IBM Content Navigator, see “[Migrating desktops](#)” in the FileNet P8 5.2 Information Center.

Description	Action
Different viewers are configured on the source server and the target server.	If you installed any viewers that are not shipped with IBM Content Navigator on the source server, such as the AFP2PDF conversion viewer, you might need to install the viewers on the target server before you can use an imported viewer map. Tip: If you installed the AFP2PDF viewer, you might need to update the installation directory in your AFP conversion viewer configuration before you can use the imported viewer map.
Users and groups not exported with the desktop configuration.	Use the IBM Content Navigator administration tool to assign the desired users and groups from the target environment for the custom desktop after it is imported.
Repositories not exported with the desktop configuration.	Use the IBM Case Manager administration client to register the IBM Case Manager target environment(s) against the custom desktop after it is imported. In this sample scenario, use the IBM Content Navigator administration tool to configure the references repository against the custom desktop after it is imported.
Relative URLs of the plug-ins were used at the source, but the plug-ins are not installed on the target system	Either update the URLs when you import the desktop to the target server to the plug-in that is deployed, or deploy the plug-ins to the same location on the target server as they were on the source.
Plug-in configuration includes additional URLs that are not valid on the target server. For example, the external data services plug-in configuration includes the URL of the external data service.	Either update the URLs when you import the desktop to the target server, or install the dependent service to the same location on the target server as it was on the source.

Figure 4 IBM Content Navigator import desktop considerations

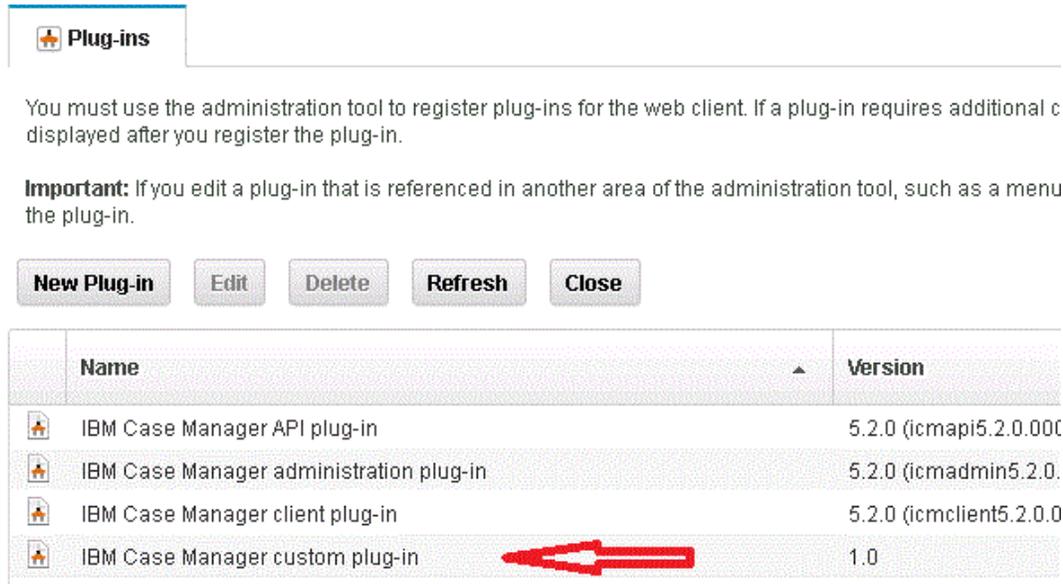
Since the repository configurations are created directly on the target system using the IBM Case Manager tools and not migrated with the desktop, additional configuration specifications are needed to complete the example used in this article. In this sample scenario two modifications are needed:

- Default repository for the Browse feature on the **Appearance** tab set to the sample 'References'.
- Repository to be used for authentication on the **General** tab. Typically this is set to the IBM Case Manager target object store.

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

1	If needed, log in to the IBM Content Navigator administration tool as previously described.
---	---------------------------------------------------------------------------------------------

2	Verify the widget was registered in IBM Content Navigator by examining the Plug-ins information in the IBM Content Navigator administration tool. For example, the fictitious plug-in can be seen listed on the Plug-Ins tab in IBM Content Navigator administration tool.
---	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------



Plug-ins

You must use the administration tool to register plug-ins for the web client. If a plug-in requires additional c displayed after you register the plug-in.

Important: If you edit a plug-in that is referenced in another area of the administration tool, such as a menu the plug-in.

New Plug-in Edit Delete Refresh Close

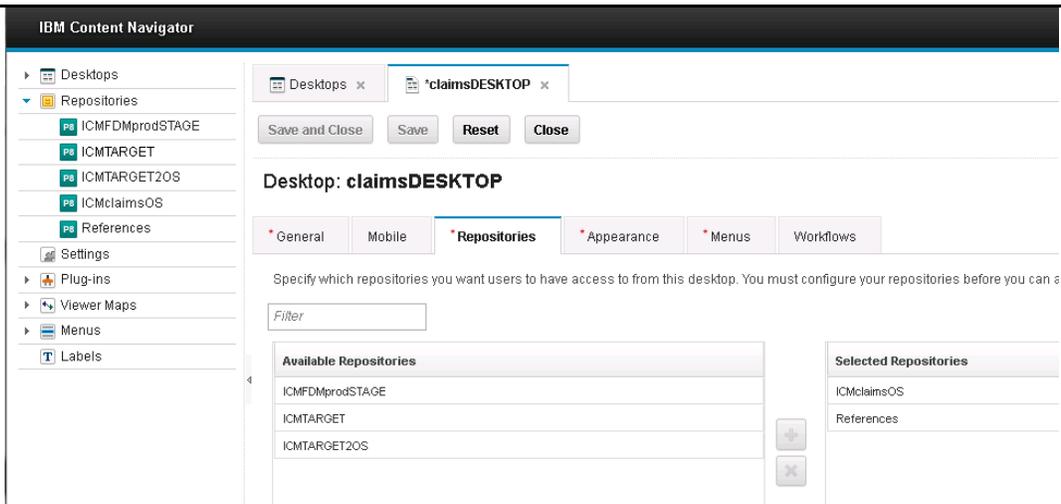
Name	Version
IBM Case Manager API plug-in	5.2.0 (icmapi5.2.0.000
IBM Case Manager administration plug-in	5.2.0 (icmadmin5.2.0.
IBM Case Manager client plug-in	5.2.0 (icmclient5.2.0.0
IBM Case Manager custom plug-in	1.0

3	The IBM Case Manager configuration tool defined the target environment's target object store in IBM Content Navigator and associated it with the imported desktop. Verify this by examining the Repositories and the imported desktop configuration.
---	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

For example, the sample object store with the IBM Content Navigator repository name of "ICMclaimsOS" can be seen as in the **Selected Repositories** on the claimsDESKTOP tab in IBM Content Navigator administration tool. To view the details of a desktop, select it on the Desktops tab and select the **Edit** button .

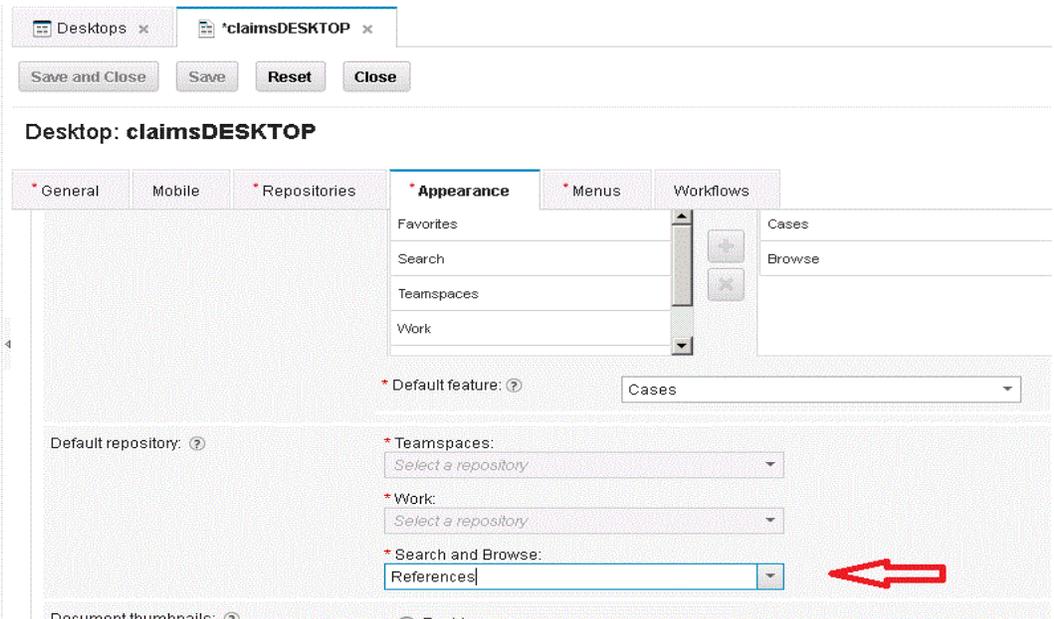
To follow the sample scenario, the external repository 'References' was manually associated with the imported claimsDESKTOP.

Step Action

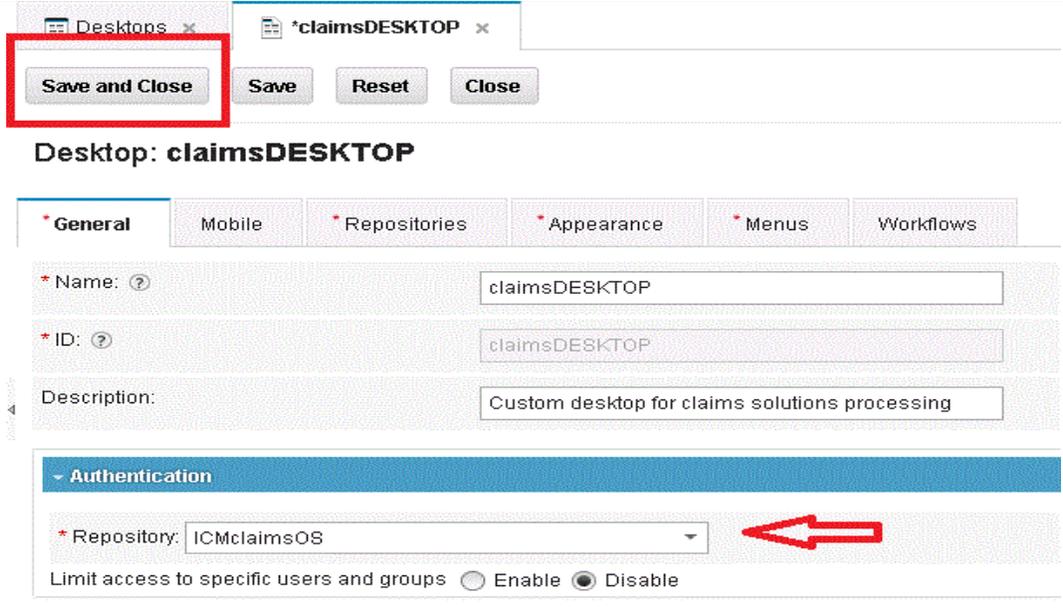


4 Complete the configuration corrections needed by the sample scenario. The additional corrections required will vary based on the IBM Content Navigator features chosen to support the solution application:

- **Appearance tab, Default repository for Search and Browse** set to 'References'.
- **General tab Authentication, Repository** set to repository for the IBM Case Manager target object store.

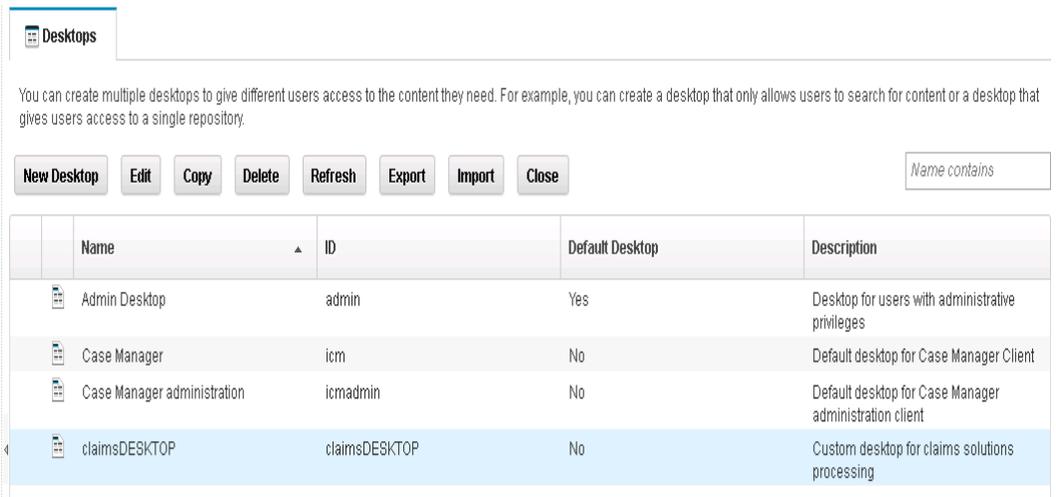


Step Action



5 When all required corrections are made, the **Save and Close** button is enabled. Use the button to save the modifications to the desktop configuration.

6 Return to the **Desktops** tab and verify the desktop is now reported as valid and the invalid icon is gone. The **Refresh** button may need to be used to see the **Invalid desktop** icon removed.



7 The customized desktop is now available for the case worker to use. Here is a view of the example search widget on the imported desktop customized with a different color scheme. Verification could be to access the deployed solution from the imported desktop and confirm the solution and search widget function as expected.

Step Action

Search:

[Advanced Search](#)

AssignedToUser(xs:string)

customer name(xs:string)

Invoice Title(xs:string)

  No case selected

No items to display

Summary Documents Tasks History

No case selected

Conclusion

Putting it all together

The three parts of the IBM Case Manager 5.2 Solution Deployment Guide show the tasks in the order they would be performed when a solution application is first migrated. It also presents tasks in logical groupings by the tools utilized to make reading the article easier. That exact ordering is not the only viable sequence.

The major goal for any site should be to develop and automate a repeatable deployment process that works for a particular solution. This repeatable process would then be used when migrating and deploying the solution with its supporting components into other environments, most especially production.

Key goals to achieve would be:

- Capture and preferably automate a repeatable process for moving the solution to production.
- Write clear instructions for the entire process capturing important facts like:
 - Security credentials used and required
 - Manual security changes
 - Configuration tweaks needed and how the tweaks are applied
 - Order in which assets must be migrated and deployed
 - Verification procedures to ensure the solution is functioning properly after it is deployed
- Test the deployment plan and instructions in a user acceptance test environment that closely matches the production environment.

This guide, along with the additional information referenced via links throughout the guide, provides a strong starting point for identifying the steps and tools needed to migrate and deploy an IBM Case Manager solution.

Appendices

Appendices

Document Conventions

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

Convention	Explanation
Bold	Words that appear in boldface represent menu options, buttons, icons, or any object you click to cause the software to perform a task. This typeface also represents anything that you must type or enter.
<i>italics</i>	In addition to book or topic titles, italics are used to emphasize certain words, especially new terms when they are first introduced.
Note	Signifies information that emphasizes or supplements important points of the main text.
 Important	Signifies information essential to the completion of a task. You can disregard information in a note and still complete a task, but you should not disregard an important note.
 Caution	This alerts you to follow a recommended procedure carefully. Failure to do so may result in installation or configuration problems or other preventable conditions.
 Tip	This helps you understand the benefits and capabilities of a feature or function. It may also provide an overview of an alternate method. A tip is not essential to the basic understanding of the text.
	This symbol indicates the end of a note, caution, or tip.

References and Acknowledgements

IBM FileNet P8 Version 5.2 Information Center

<http://pic.dhe.ibm.com/infocenter/p8docs/v5r2m0/index.jsp>

IBM Case Manager Version 5.2 Information Center

<http://pic.dhe.ibm.com/infocenter/casemgmt/v5r2m0/index.jsp>

Redbooks:

IBM FileNet Content Manager Implementation Best Practices and Recommendations

<http://www.redbooks.ibm.com/abstracts/sg247547.html>

Advanced Case Management with IBM Case Manager

<http://www.redbooks.ibm.com/abstracts/sg247929.html>

Customizing and Extending IBM Content Navigator

<http://www.redbooks.ibm.com/abstracts/sg248055.html>

developerWorks articles:

IBM Case Manager 5.2 Solution Deployment Guide, Part 1 and Part 2

https://www.ibm.com/developerworks/community/blogs/e8206aad-10e2-4c49-b00c-fee572815374/entry/ibm_case_manager_5_2_solution_deployment_guide?lang=en

Converting a Custom Search Widget from ICM 5.1.1 to ICM 5.2 v2

https://www.ibm.com/developerworks/community/blogs/e8206aad-10e2-4c49-b00c-fee572815374/entry/converting_a_custom_search_widget_from_icm_5_1_1_to_icm_5_2?lang=en

IBM Case Manager V5.2.0 Custom Page Widgets and Actions Development

https://www.ibm.com/developerworks/community/blogs/e8206aad-10e2-4c49-b00c-fee572815374/entry/ibm_case_manager_v5_2_0_custom_page_widgets_and_actions_development?lang=en

Thank you to the IBMers who contributed examples and reviewed this article:

Paul Mac Alpine
Johnson Liu
Jennifer Miller