
IBM FileNet Business Process Framework to IBM Case Manager Transition Guide

Tao Liu

Gai Li

Ellen Liu

He Sheng Yang (Harris)

Xiao Jian Lian (Brian)

Stella Zhang

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Summary of Changes

The Document Author is authorized to make the following types of changes to the document without requiring that the document be re-approved:

- Editorial, formatting, and spelling
- Clarification
- Document structure

To request a change to this document, contact the Document Author or Owner.

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1 Introduction

The purpose of the *BPF To ICM Transition Guide* is to provide user with basic steps about how to reuse the existing BPF metadata in ICM environment, referred to throughout this document as basic guidelines, which is used to transition customer's production environment from BPF to ICM. Typical BPF application "Case Management" is to be used as an example in the guide showing the entire transition solution.

1.1 Intended audience

This document is intended for GBS technique experts, that is, developers and administrators of FileNet applications who are responsible for offering Business Process Framework (BPF) to IBM Case Manager (ICM) Transition service for customers.

1.2 Assumptions and recommended education

This document assumes the GBS technique experts are familiar with the concepts of BPF and ICM, has attended FileNet training of Content Manager and Business Process Manager, and has a general understanding of Java integration and database administration concepts.

1.3 FileNet components

The transition administrators should understand general FileNet P8 Platform Content Manager and Business Process Manager Configuration and administration, even if they are not the primary FileNet system administrator. The following courses provide the necessary FileNet background:

- IBM FileNet P8 Platform 5.0: Installation F1480
- FileNet P8 Platform Administration F1440
- FileNet P8 Platform Process Design F0470

2 Transition overview

BPF (Business Process Framework) is a case management framework. It operates with complex business objects as opposed to BPM, which operates with workflow objects, or ECM that operates with documents, when manipulated with Workplace.

ICM (IBM Case Management) is advanced case management product. The concept of case management emerged from the realization that certain business applications performed by knowledge workers require a great deal of flexibility, adaptability, control and collaboration to achieve successful outcomes. In certain domains, such as health care, insurance, and the legal profession, case management is fairly well understood in these industries. And this case management approach can be successfully applied to a broad set of business applications, giving knowledge workers and businesses the capabilities they need to achieve their business objectives. Compare to BPF, ICM provide friendlier user interface and faster deployment, it is easier to use for developing an application to achieve the client's business objective.

BPF and ICM are both built around the concept of case, and the case related process. And the Role in-basket is used in both systems to display the work item for a role. So the BPF application metadata such as case, process, roles, and role in-baskets can be reused in ICM system to rebuild an ICM application, which is called ICM solution.

In this document, some general steps are provided to explain how to help Customers to transit their BPF application to ICM solution.

3 Planning and preparing for BPF to ICM transition

Before you begin the Transition of BPF to ICM, you must plan the transition steps and prepare your environment.

3.1 Planning the transition

Before you begin to do the transition:

- *Ensure you have fully understanding the BPF application you want to transit including the process, casetype, eForms template, roles and role in-basket.*
- *Ensure you have fully understanding the function gap between BPF and ICM.*
- *Ensure you have fully understanding the transition objective and limitations.*
- *Ensure you have fully understanding the transition steps.*

3.2 Prerequisites for BPF to ICM transition

The BPF and ICM applications work within the FileNet P8 Platform environment. You must install and configure your FileNet P8 Platform environment before your transition.

FileNet P8 Platform components must be installed and operational before you begin transition BPF to ICM:

- Business Process Framework 4.1.x and above
- IBM Case Manager 5.1.1 and above
- For P8 components including Process Engine, Content Engine, Application Engine please refer to the compatibility matrix & HW/SW guide as below link:
<http://www-01.ibm.com/support/docview.wss?uid=swg27013654>

4 BPF to ICM transition objective and limitations

The Transition objective is to reuse the metadata of existing BPF application to build a new ICM solution on ICM system to help the Customers to migrate their business from BPF to ICM. The metadata is limited to case design data. The BPF runtime data is not in the transition scope.

The Reusable BPF metadata include **BPF Roles**, **BPF Case type**, **BPF Process**, **BPF In-basket** and **eForms Template**. Below Table shows what's kind of BPF Metadata can be transitioned successfully to ICM and what's kind of BPF Metadata cannot be transitioned.

Table 4-1 BPF reusable metadata

Metadata Area	Metadata Type	Transmittable	Comments
Roles&Users	Roles	Yes	Can be transitioned directly



	Users	Yes	Both BPF and ICM users are in LDAP, so the users can be reused directly. Actually, Users are runtime data rather than design data.
	Relationship between role and user	Yes	After deployment but before production, it is possible to setup the relationship based on BPF data (actually the LDAP group and users) and ICM API. It also needs to consider CE Access Role.
Case type	Case Types and Fields	Yes	Can be transitioned directly
	Static Pick Lists	Yes	Can be transitioned directly to choice list
	SQL based Pick List	Yes	Pick list created by SQL cannot be reused directly. If user want to reuse the SQL based Pick List, it can be implemented as an External Data Service in ICM. If IBM Form or eForms is used, it can be implemented by choice list in forms.
	BPF Look-up Plug-in	Yes	Can be transitioned by External Data Service in ICM. If IBM Form or eForms is used, it can be implemented in forms.
Process	Workflow	Yes	BPF uses workflow in PE, and ICM can have task to reuse FileNet BPM process (workflow). A better solution is to redesign the BPF workflow in ICM by leveraging the rich task model.
	Steps Queue	Yes	Need update the work queue created by ICM
	Responses	Yes	Can be transitioned reusing FileNet BPM processes at task in ICM.
	Actions	Not necessary	It is only a new name as



			“Response” defined in BPF (1:1 mapping), so no need to transition.
	Reasons	No	The users can define some pre-defined “Reasons” for responses. ICM v5.1.1 does not provide same feature yet, but user still can input as many as comments to case in ICM.
	BPF Operations: createCase, updateCase, attachDoc, attachFolder, detachFolder, logEvent ...	Yes	This is the API of BPF, which is invoked at step of PE workflow to achieve some BPF specific operations, such as create BPF case, update case, attach document, etc. This API cannot be ported into ICM system directly. ICM provides Case API to perform same case operations.
<i>In-basket</i>	In-baskets	Yes	The standard In-basket and its properties can be transitioned to ICM. The BPF case query In-basket does not need be transitioned.
	In-basket Templates	No	
	In-basket Filters	Yes	In-basket filter is used at run time in both BPF and ICM. The filter conditions are composed of business properties. ICM is more user-friendly and with different mechanism, while BPF uses SQL to define it. This is the most complicated feature to map. You have to redefine all in-basket filters in Case Builder.
	Queue Filters	Not necessary	In BPF Queue Filter is used by designer to screen the work items to an In-basket, which are composed of system properties, for example, Assigned User. All roles in BPF share same work queue, otherwise, each role has the dedicate work queue in ICM. So it is not necessary to have Queue filters in ICM.
<i>eForms Template</i>	eForms Form Template	Yes	Form template (property, layout, event handling) is designed by eForms Designer, and stored as a document in

			CE, so it is reusable.
Others	Application Settings	Not applicable	<p>This type of data is used by BPF application only. Since ICM is configured by CMAC (Configuration Manager Administration Client), it is not necessary to transition those data.</p> <p>Some examples of such data:</p> <ul style="list-style-type: none"> - PE/CE connection information - Window size <p>Some options</p> <p>ICM is a new application based on Widgets and Web 2.0. The application setting is defined by defining pages, Widgets style, etc.</p>
	Customer code of the BPF application including JSP, JavaScript	Not applicable	ICM is a new application based on Widgets and Web 2.0. While BPF is built on JSP and JS. So the customer code for BPF cannot be reused in ICM.
	MOSS (Multiple Object Store Support)	Not applicable	ICM does not support MOSS yet, and users have to make cases and all related content into single object store today.

5 BPF to ICM transition steps

In this chapter, the basic BPF to ICM transition steps are provided and a sample BPF application, Case Management, is used as an example to describe the procedure transitioning the BPF application to ICM solution.

This chapter covers the following topics, which are the basic steps for transitioning BPF application to ICM, including:

- BPF application Case Management introduction
- Identifying BPF metadata to be reused in the ICM solution
- Mapping the BPF metadata to the ICM solution artifacts
- Creating ICM solution by reusing BPF metadata
- Transitioning BPF workflow
- Reusing eForms template

5.1 BPF application introduction

The workflow of 'Case Management' is a typical BPF application with the basic steps definition as below:



Main workflow of BPF application

In this case, there are 4 roles to manage the approval process, which have some in-baskets mapping to the roles. It also shows:

- All case fields type used in the workflow.
- eForms template is used for operate cases
- Easy deployment. After installed the BPF the application will be deployed in BPF system automatically.

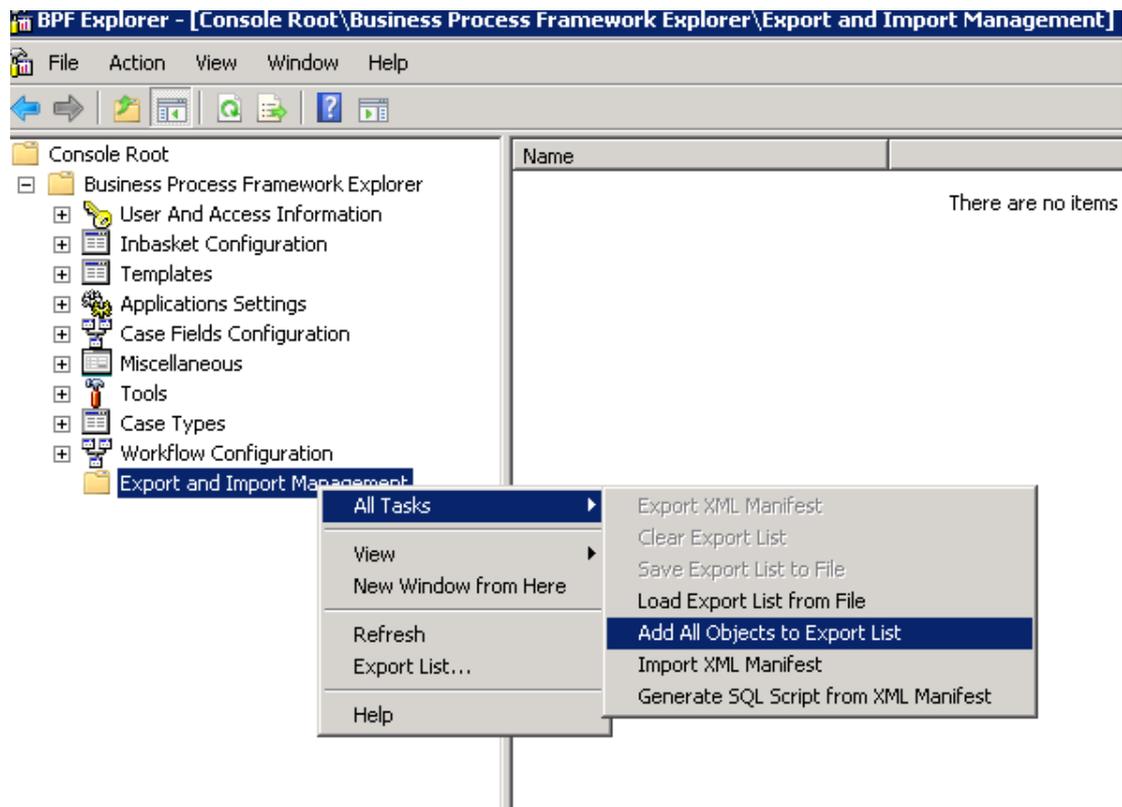
The workflow tells in general approval process, the indexer will input the data and initiate the process, and then reviewer and approver will handle the request based on the criterion. And supervisor has the privilege on every step to handle the exception. Let's see how the BPF application been transited to ICM in the following sections.

5.2 Identifying BPF metadata to be reused in the ICM solution

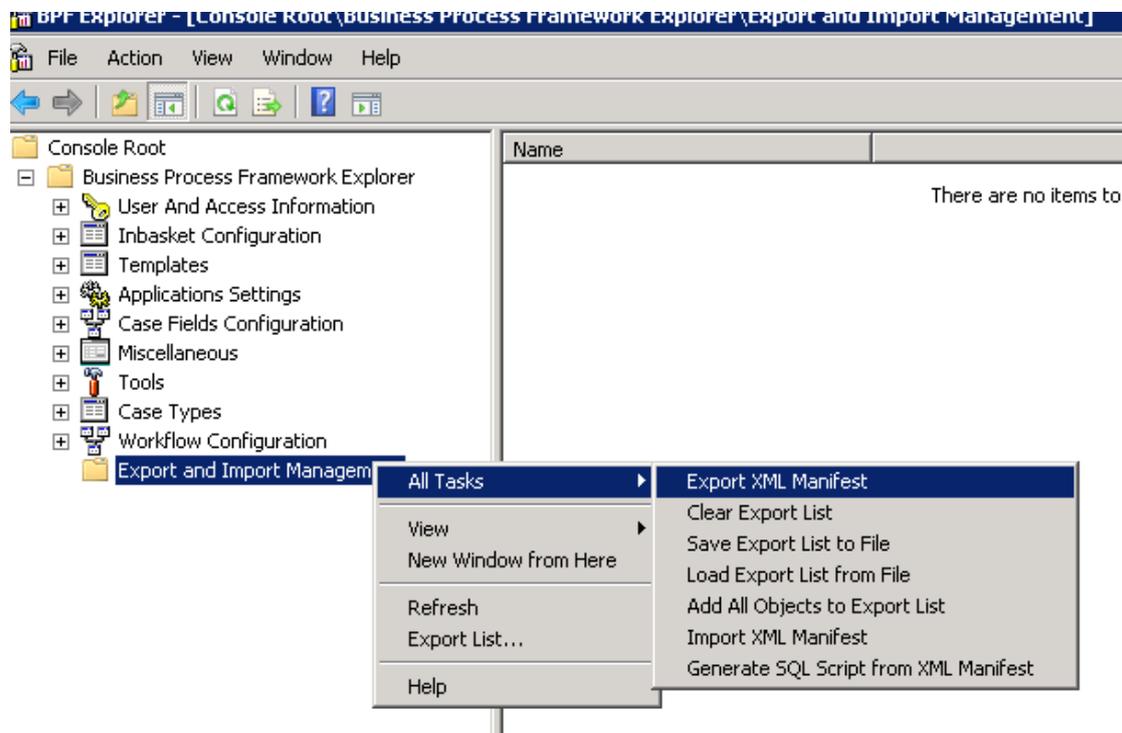
Role, Process, Case Type, In-basket are the most important metadata to business with the most design data, which need be reused in the ICM solution. Before transition, you must identify these metadata of the BPF application from BPF manifest and CE manifest.

To retrieve BPF manifest, you need to export it from BPF explorer

1. Add all objects to export list



2. Export XML manifest



To retrieve CE manifest, you can directly get it from BPF installation package:

INSTALLATION_FOLDER/misc/solutions/case_management/config/ce_cm.xml

5.2.1 Case Type

A case type is the core BPF application metadata, which connect with the case fields, WORKFLOW, DOCUMENTCLASS, CASEOBJECTSTORE and In-basket. General speaking, one BPF application has one case type, so the BPF application can be identified by case type. And other BPF metadata can be identified by case type as well.

Before transition the BPF application, you should already know the case type name of the application. If you do not know the case type name, you can find it in BPF manifest file <CaseTypes>...</CaseTypes> part. All the Case types and case type attributes are listed in this part. Choose the one you need from the list for transition.

Below case type attributes need to be identified:

- NAME (Used to identify all the case fields, in-baskets connected with the Case type)
- WORKFLOWCLASSNAME (Used to identify the workflow connected with the Case type)
- DOCUMENTCLASSNAME (Used to identify the document class connected with the Case type)

5.2.1.1 Case Type of BPF example

For BPF application 'Case Management', the case type for the application is "Case Management", below Case types and case type attributes can be found in BPF manifest file <CaseTypes>...</CaseTypes> part:

```
<CaseType ID="3" NAME="Case Management" DELETEWHENCLOSED="0"
CREATABLEFROMWEB="1" CECLASSNAME="CaseManagement"
WORKFLOWCLASSNAME="Case Management Workflow"
DOCUMENTCLASSNAME="CaseManagementDocuments"
FAVORITEFIELDNAME="Bp8CaseID" ALLOWBROWSEFILE="1"
CASEOBJECTSTORENAME="Bp8Objectstore"
DOCOBJECTSTORENAME="Bp8Objectstore"
AUDITOBJECTSTORENAME="Bp8Objectstore"/>
```

Then the needed attributes of the case type can be identified in below table.

Table 5-1 BPF Case Type Attributes

Case Type Name	Case Management

WORKFLOW CLASS NAME	Case Management Workflow
DOCUMENT CLASS NAME	CaseManagementDocuments

5.2.2 Case Fields

A BPF case field represents transactional data stored with the case. To identify the case fields and its attributes, you can take below steps:

1. Identify the name of case field related with the BPF application and generate a list to record them. The case field name related to the BPF application can be identified by case type name from the BPF manifest file `<CaseFieldLinks></CaseFiledLinks>` part. Below is an example of `<CaseFieldLink>`.

```
<CaseFieldLink ID="61" NAME="BP8Active (CaseType: Case Management)"
FIELDID="96" CASETYPEID="3"/>
```

All case fields can be identified by CASETYPEID. All BPF specific case fields, including **BP8Active**, **Bp8CaseID**, **Bp8CaseType**, etc. are not required for transition and these fields can be ignored.

2. Identify the attributes of case field related to the BPF application and generate a list to record them. After identified the name of case fields, you need to find out the case field attributes by case field name from the BPF manifest file `<ApplicationFields>...</ApplicationFiledS>` part.

Below case type attributes are to be identified:

- NAME (The name of the Case field in BPF)
- LABEL (The display name of the Case Field in BPF)
- DATATYPE (The data type of the Case field)
- DBCOLUMN (The name of the CE property associated with the Case field. If a Case field has no this attribute means the Case field is only a workflow field)
- WORKFLOWFIELD (The name of the workflow field which associated with the Case field)
- INDEXFIELD (The name of the case document class property which associated with the case field)
- PICKLISTNAME (The name of the pick list used by the case field. If a Case field has no this attribute means the Case field do not use the pick list)
- READFROMWF (The value of the attribute is 1 means the value of the case field is come from workflow)



- LOOKUP (The value of the attribute is 1 means this case field is using a BPF lookup plugin)
- LookupURL (This attribute point to the lookup plugin page if the case field is using a lookup plug in)
- MAXCHARS (The max length for this field)

The Case fields and its attributes can be record in below table named Case Fields Table template.

Table 5-2 BPF Case Fields Table

NAME	LABEL	DBCOL UMN	WORKFL OWFIELD	INDEXF IELD	DATA TYPE	MAXC HARS	READFR OMWF	LOOK UP	PICKLIST NAME

- Identify the attributes of the CE properties associated with the case fields. These attributes of the CE properties can be found from CE Property Templates manifest file. Below attributes of the CE properties need to be identified:
 - IsValueRequired (If the value of this attribute is 1, it means the case field is required)
 - IsHidden (If the value of this attribute is 1, it means the case field is hidden)
 - PropertyDefaultString (The value of this attribute is the default value of the case field)
 - PropertyDisplayCategory (If the value of this attribute is “BPF System Properties”, the case field can be ignored since it is BPF specific case field. It is not to be transitioned)

The Case fields and its CE property attributes can be recorded into below table named “CE Case Fields Table” template. The PropertyDisplayCategory with “BPF System Properties” value does not need be recorded.

Table 5-3 CE Case Fields Table

NAME	IsValueRequired	IsHidden	PropertyDefaultString

- Identify the workflow system fields. You can identify a workflow system fields by DATATYPENAME attribute with the value of WORKFLOWGROUP, or the WORKFLOWFIELD attribute start with “F_”.

5.2.2.1 Case Fields of BPF example

For BPF application ‘Case Management’, firstly, you can find below case fields from BPF manifest file <CaseFieldLinks> part.



```

<CaseFieldLink ID="61" NAME="BP8Active (CaseType: Case Management)"
FIELDID="96" CASETYPEID="3"/>
  <CaseFieldLink ID="63" NAME="BoundUser (CaseType: Case Management)"
FIELDID="309" CASETYPEID="3"/>
  <CaseFieldLink ID="64" NAME="Bp8CaseID (CaseType: Case Management)"
FIELDID="78" CASETYPEID="3"/>
  <CaseFieldLink ID="65" NAME="Bp8CaseType (CaseType: Case Management)"
FIELDID="325" CASETYPEID="3"/>
  <CaseFieldLink ID="66" NAME="Creator (CaseType: Case Management)"
FIELDID="321" CASETYPEID="3"/>

  <CaseFieldLink ID="97" NAME="BPFMoney (CaseType: Case Management)"
FIELDID="362" CASETYPEID="3"/>
  <CaseFieldLink ID="98" NAME="BPFNumeric (CaseType: Case Management)"
FIELDID="363" CASETYPEID="3"/>
  <CaseFieldLink ID="99" NAME="BPFPicklist (CaseType: Case Management)"
FIELDID="364" CASETYPEID="3"/>
  <CaseFieldLink ID="100" NAME="BPFString (CaseType: Case Management)"
FIELDID="359" CASETYPEID="3"/>
    
```

Secondly, after removing the BPF specific case fields and generate below list.

Table 5-4 BPF Sample Application Case Fields List

NAME	LABEL	DBCOL UMN	WORKFLO WFIELD	INDEXF IELD	DATA TYPE	MAXC HARS	READFR OMWF	LOOK UP	PICKLIST NAME
Creator	Creator	Creator			STRIN G	50			
AccountNumbe r	Account Number	Accoun t Numbe r			STRIN G	20			
CompanyName	Company Name	Compa nyNam e	Company Name	Compa nyNam e	STRIN G	40			Company NameList
DesignatedRep	Designated Rep	Designa tedRep			STRIN G	40			
EffectiveDate	Effective	Effectiv			DATE	20			



	Date	eDate							
ContractAmount	Contract Amount	ContractAmount	ContractAmount	ContractAmount	MON EY	20			
DocumentType	Document Type	DocumentType	Document Type	DocumentType	NUM ERIC	20			Document Types
Priority	Priority	CasePriority	Priority	CasePriority	STRIN G				Priorities
ReceivedDate	Received Date	ReceivedDate	ReceivedDate	ReceivedDate	DATE	20			
Comment	Comment	Comment			STRIN G	256			
PrimaryCaseID	Primary Case ID	Primary CaseID			NUM ERIC	20			
Expired	Expired	Expired			BOOLEAN				
Rejected	Rejected	Rejected	Expired		BOOLEAN				
SendToHost	Send To Host	SendTo Host	SendToHost		BOOLEAN				
BoundUser	BoundUser		F_BoundUser						
LockUser	LockUser		F_LockUser						
Step Name	Step Name		F_StepName						
SUPERVISOR Group	SUPERVISOR Group		SUPERVISOR		WORKFLOW GROUP				
APPROVER Group	APPROVER Group		APPROVER		WORKFLOW GROUP				
INDEXER Group	INDEXER Group		INDEXER		WORKFLOW GROUP				
REVIEWER Group	REVIEWER Group		REVIEWER		WORKFLOW GROUP				



					OUP				
CreateCase	CreateCase		CreateCase		NUMERIC				

Thirdly, identify the attributes of the CE properties associated with the case fields from CE Property Templates manifest file.

Table 5-5 Attributes of CE Properties

NAME (DBCOLUMN)	IsValueRequired	IsHidden	PropertyDefaultString
Creator	No	No	No
AccountNumber	No	No	No
CompanyName	No	No	No
DesignatedRep	No	No	No
EffectiveDate	No	No	No
ContractAmount	No	No	No
DocumentType	No	No	No
Priority	No	No	No
ReceivedDate	No	No	No
Comment	No	No	No
PrimaryCaseID	No	No	No
Expired	No	No	No
Rejected	No	No	No
SendToHost	No	No	No

Fourthly, identify the workflow system fields.

Table 5-6 Workflow System Fields

NAME	WORKFLOWFIELD	DATATYPE
BoundUser	F_BoundUser	
LockUser	F_LockUser	
Step Name	F_StepName	
SUPERVISOR Group	SUPERVISOR	WORKFLOWGROUP
APPROVER Group	APPROVER	WORKFLOWGROUP
INDEXER Group	INDEXER	WORKFLOWGROUP
REVIEWER Group	REVIEWER	WORKFLOWGROUP

5.2.3 Static Pick List

A pick list is a collection of predefined property values that present a list of valid choices. A pick list can be assigned to one or multiple case fields. A pick list typically is comprised of ID, Code (short value), Description (longer description), and an Active Flag. A pick list can also contain

additional user defined columns. A pick list can be a static list, or a dynamically generated list defined via a SQL statement. The static list can be reused in ICM, but dynamically generated list has to be implemented by External Data Service in ICM.

The name of pick lists used in the BPF application is already identified in chapter of Case Fields. The attributes of pick lists can be identified from BPF manifest file <PickLists> part. Below attributes of the pick lists need to be identified:

- NAME (The name of the pick list)
- Code (The code of the pick list, it can be found from the child node <Items> of <PickLists>, if a pick list has no child node <Items>, it means this pick list is dynamically type pick list)
- DESCRIPTION (The DESCRIPTION of the pick list code, it can be found from the child node <Items> of <PickLists>, if a pick list has no child node <Items>, it means this pick list is dynamically type pick list.)

The pick lists and its attributes can be recorded in below table.

Table 5-7 Pick List Table

Pick List name	Code	DESCRIPTION

5.2.3.1 Static Pick List of BPF example

The pick lists which used in the BPF application 'Case Management' can be found below:

Table 5-8 BPF Sample Application Pick List Table

Pick List name	Code	DESCRIPTION
CompanyNameList	IBM	IBM
	Oracle"Sun	Oracle"Sun
	IBM's CDL	IBM's CDL
	IBM%IBM	IBM%IB
Document Types	1	Primary
	2	Support
Priorities	1	High
	2	Med
	3	Low

5.2.4 Dynamic Pick List

The dynamic pick list is a dynamically generated list defined via a SQL statement. This kind of pick list cannot be reused directly in ICM. To transition the dynamic pick list, you can use ICM

External Data Service to develop a REST service, which can be called by ICM. If IBM Form or eForms is used in ICM, forms can implement it.

At this step, we need identify the name and the SQL of the dynamic pick list.

Table 5-9 Dynamic Pick List Table

Pick List name	SQL	DESCRIPTION

5.2.4.1 Dynamic Pick List of BPF example

The dynamic pick lists which used in the BPF application 'Case Management' can be found below:

Table 5-10 BPF Example Dynamic Pick List Table

Pick List name	SQL	DESCRIPTION

5.2.5 Lookup fields

The Lookup is a special Case field attribute that serves to:

- Provide better performance on pick list fields where the pick list contains a large number of entries (usually in the hundreds range).
- Allow implementing a type ahead pick list. Allow assigning a custom URL as a data source for the field.

The lookup fields cannot be reused directly in ICM. To transition the lookup fields, you can use External Data Service to develop a REST service, which can be called by ICM case API. If IBM Form or eForms is used in ICM, Form can implement it.

At this step, we need identify the filed name and the lookup URL of the lookup field.

Table 5-11 Lookup Fields Table

Field Name	LookupURL

5.2.5.1 Lookup fields of BPF example

The lookup fields that used in the BPF application 'Case Management' can be found below:

Table 5-12 BPF Example Lookup Fields Table

Field Name	LookupURL
Priority	

5.2.6 In-basket

An In-basket is a feature that allows locating and processing BPF Cases in the context of workflow. In-baskets in the BPF Web Application provide an interface that delivers a browse able, filtered access to workflow queue(s) based on the user role. In-baskets provide access to Case objects rather than workflow objects. A workflow queue, step, and security profile are always needed to configure an In-basket. This means that there are as many In-basket definitions as combinations of work queues/steps and roles.

To identify the metadata of In-baskets, you need take two steps. First step is to identify the In-baskets and its attributes. Second step is to identify the in-basket filters.

1. Identify the In-baskets and its attributes. The BPF In-baskets and its attributes related to the BPF application can be identified by case type name from the BPF manifest file <Inbaskets>...</Inbaksets> part. Below In-baskets attributes need to be identified:
 - NAME (The name of the In-basket)
 - INBASKETTYPE (The Type of the in-basket, only in-basket with STANDARD type need to be transitioned to ICM)
 - PROFILENAME (The role who owns the In-basket)
 - WORKFLOWQUEUE (The workflow queue which is read by this In-basket)
 - WORKFLOWSTEP (The workflow step which is read by this In-basket)
 - Columns (The case fields displayed on this In-basket. Note that the name of workflow system field need be changed to its WORKFLOWFIELD. The BPF specific case field need be removed, the attributes for the Columns should be identified below)
 - SORTORDER (This attribute means the field is sortable)
 - DEFAULTORDER (The value of this attribute is 1 means this field is sort default field)
 - Layout (The case fields displayed on the case information page. Note that the name of workflow system field need be changed to its WORKFLOWFIELD. The BPF specific case field need be removed)
 - Filters (The in-basket filters. Note that the name of workflow system fields need be changed to its WORKFLOWFIELD. The BPF specific case field need be removed)

The identified In-baskets and its attributes can be recorded in below table.



Table 5-13 In-basket List Table

NAME	INBASKETTYPENAME	PROFILENAME	WORKFLOWQUEUENAME	WORKFLOWSTEPNAME	Columns	Layout	Filters

- Identify the in-basket filters. The Definition of in-basket filter can be found in the BPF manifest file <InbasketFilters>...</InbasketFilters> part. Below attributes of the In-basket filter need to be identified:

Table 5-14 Inbasket Filter List

Filter name	RegularSQL

5.2.6.1 In-basket of BPF example application

The In-baskets related to the BPF application 'Case Management' can be found in below table.

Table 5-15 In-baskets related to the BPF example application

NAME	INBASKETTYPENAME	PROFILENAME	WORKFLOWQUEUENAME	WORKFLOWSTEPNAME	Layout	Columns	Filters
Index	STANDARD	Indexer	CaseManagement	IndexingQueue	Bp8CaseID AccountNumber CompanyName DesignatedRep EffectiveDate ContractAmount ReceivedDate Priority Comment SendToHost Rejected PrimaryCase	AccountNumber(sortable) CompanyName(sortable) ReceivedDate(sortable) Priority(sort default field)	Priority ReceivedDate



					ID PERSONAL Group Expired DocumentTy pe Bp8CaseTyp e		
My Work	STANDARD	Indexer	Inbox		Bp8CaseID AccountNum ber CompanyNa me DesignatedR ep EffectiveDat e ContractAm ount ReceivedDat e Priority Comment SUPERVISOR Group SendToHost Rejected PrimaryCase ID PERSONAL Group LockUser Expired DocumentTy pe Bp8CaseTyp e	AccountNum ber(sortable) CompanyNa me(sortable) ReceivedDat e(sortable) Priority(sort default field)	Priority ReceivedDat e AccountNum ber CompanyNa me
Index	STANDARD	Supervis or	CaseMan agement	Indexing Queue	Bp8CaseID AccountNum ber CompanyNa me	AccountNum ber(sortable) CompanyNa me(sortable)	Priority ReceivedDat e AccountNum ber



					DesignatedRep EffectiveDate ContractAmount ReceivedDate Priority Comment DocumentType LockUser Bp8CaseType	ReceivedDate(sortable) Priority(sort default field) LockUser(sortable)	CompanyName
Review	STANDARD	Supervisor	CaseManagement	Review Queue	Bp8CaseID AccountNumber CompanyName DesignatedRep EffectiveDate ContractAmount ReceivedDate Priority Comment DocumentType REVIEWER Group Creator PERSONAL Group Bp8CaseType	AccountNumber(sortable) CompanyName(sortable) ReceivedDate(sortable) Priority(sort default field)	Priority ReceivedDate AccountNumber CompanyName
Matching	STANDARD	Indexer	CaseManagement	Matching Queue	Bp8CaseID AccountNumber	AccountNumber(sortable)	Priority ReceivedDate



					CompanyName DesignatedRep EffectiveDate ContractAmount ReceivedDate Priority Comment SendToHost Rejected PERSONAL Group Expired DocumentType Bp8CaseType	CompanyName(sortable) ReceivedDate(sortable) Priority(sort default field)	AccountNumber CompanyName
Matching	STANDARD	Supervisor	CaseManagement	Matching Queue	Bp8CaseID DocumentType AccountNumber CompanyName DesignatedRep EffectiveDate ContractAmount ReceivedDate Priority Comment PERSONAL Group Bp8CaseType	AccountNumber(sortable) CompanyName(sortable) ReceivedDate(sortable) Priority(sort default field)	Priority ReceivedDate AccountNumber CompanyName



My Work	STANDARD	Supervisor	Inbox		Bp8CaseID AccountNumber Company Name DesignatedRep EffectiveDate ContractAmount ReceivedDate Priority Comment Expired DocumentType PERSONAL Group Bp8CaseType	AccountNumber(sortable) Company Name(sortable) ReceivedDate(sortable) Priority(sort default field)	Priority ReceivedDate AccountNumber Company Name
Pending Approvals	STANDARD	Approver	Inbox	Approve Queue	Bp8CaseID AccountNumber Company Name DesignatedRep EffectiveDate ContractAmount ReceivedDate Priority Comment DocumentType pe Rejected Expired PERSONAL	AccountNumber(sortable) Company Name(sortable) ReceivedDate(sortable) Priority(sort default field)	Priority ReceivedDate AccountNumber Company Name



					Group SUPERVISOR Group Bp8CaseType		
My Work	STANDARD	Reviewer	Inbox		Bp8CaseID AccountNumber CompanyName DesignatedRep EffectiveDate ContractAmount ReceivedDate Priority Comment Rejected PERSONAL Group Expired DocumentType SUPERVISOR Group Bp8CaseType	AccountNumber(sortable) CompanyName(sortable) ReceivedDate(sortable) Priority(sort default field)	Priority ReceivedDate AccountNumber CompanyName
Review	STANDARD	Reviewer	CaseManagement	Review Queue	Bp8CaseID AccountNumber CompanyName DesignatedRep EffectiveDate ContractAmount ReceivedDate	AccountNumber(sortable) CompanyName(sortable) ReceivedDate(sortable) Priority(sort default field)	Priority ReceivedDate AccountNumber CompanyName



					e Priority Comment DocumentTy pe REVIEWER Group Creator PERSONAL Group Bp8CaseTyp e		
--	--	--	--	--	--	--	--

Below in-basket filter definition can be identified:

Table 5-16 In-basket Filter List

Filter name	RegularSQL
ReceivedDate	ReceivedDate < (%CEILDATE%) and ReceivedDate >= (%FLOORDATE%)
CompanyName	CompanyName LIKE '%PARAM1%'
AccountNumber	AccountNumber LIKE '%PARAM1%'
Priority	Priority LIKE '%PARAM1%'

5.2.7 Roles & Users

BPF Roles related to the BPF application can be identified by the attribute profilename of in-basket.

Then the users belongs to the role can be found from BPF manifest file <Users>...</Users> part.

5.2.7.1 Roles and Users of BPF example application

The roles and users of the BPF application 'Case Management' can be found by In-baskets profilename attribute.

Table 5-17 BPF Example Roles List

PROFILENAME/Role	Description
------------------	-------------



Indexer	The case initiator
Reviewer	The people who need to review the data and document in approval case.
Approver	The people who need to approve the request based on the criterion.
Supervisor	The admin who has the super privilege to handle the special case in every step.

And following users belong to a role can be found from BPF manifest.

Table 5-18 Roles and Users Mapping in BPF example

Role	User
Indexer	Indexer joe
Supervisor	Supervisor Administrator Sue apa
Approver	approver ana
Reviewer	Reviewer mark

5.2.8 Process

Process means the workflow and related Steps, Queues, Responses, Actions and Reasons used in the BPF application. The workflow and its Steps, Queues, Responses can be reused in ICM with that feature “Reuse of existing FileNet BPM processes” from Task.

The Workflow name is already identified at the chapter Case Type. Other information of the workflow can be identified from BPF manifest file.

5.2.8.1 Process of BPF example application

Below process information can be found from BPF manifest file by workflow name.

Table 5-19 BPF Example Workflow

Workflow	Queues	Steps	Responses
----------	--------	-------	-----------



Case Management Workflow	CaseManagement	Indexing Queue Matching Queue Approve Queue Review Queue	IndexComplete IndexPend IndexReject IndexRescan PendComplete PendReject PendRoute PendSendToApproval ReviewPend ReviewReject ReviewRoute ReviewSendToApproval MatchingAttach MatchingComplete MatchingReindex MatchingReject MatchingRescan MatchingRestart ApproveApprove ApproveReject ApproveRoute
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5.2.9 Document Class

Document class in BPF is used to save case attachments. The document class name and object store are already found in the chapter case type. The class properties of the document class need be identified from CE manifest.

5.2.9.1 Document Class of BPF example application

The Document class name, CaseManagementDocuments, is already identified in the chapter of Case Type.

Below class properties information can be found from CE manifest by Document Class name.

Table 5-20 BPF Example Case Document Class

DOCUMENT CLASS NAME	CaseManagementDocuments
----------------------------	-------------------------



DOCUMENT OBJECT STORE NAME		Bp8Objectstore				
DOCUMENT Properties						
Name	Type	Default Value	Is Required	Choice List	BPF Specific	Hidden
DocEntryStatus	Integer		No	DocEntryStatuses	No	No
DocumentType	Integer		No		No	No
CasePriority	String		No	CasePriority	No	No
Received Date	DateTime		No		No	No
Company Name	String		No		No	No
Contract Amount	Float		No		No	No
Effective Date	DateTime		No		No	No
Account Number	String		No		No	No
Bp8CaseID	Integer		No		Yes	No

Some of these document properties are related to the BPF case fields, which can be found in the INDEXFIELD Column of the Case Fields table. This kind of document properties name need be changed to Case Fields name.

Below table shows the updated document class definition:

Table 5-21 BPF Example Case Document Class

DOCUMENT CLASS NAME		CaseManagementDocuments				
DOCUMENT OBJECT STORE NAME		Bp8Objectstore				
DOCUMENT Properties						
Name	Type	Default Value	Is Required	Choice List	BPF Specific	Hidden
DocEntryStatus	Integer		No	DocEntryStatuses	No	No
DocumentType	Integer		No		No	No
Priority	String		No	Priority	No	No
ReceivedDate	DateTime		No		No	No
CompanyName	String		No		No	No
ContractAmount	Float		No		No	No
EffectiveDate	DateTime		No		No	No
AccountNumber	String		No		No	No
Bp8CaseID	Integer		No		Yes	No



If the choice list is used on the document property that is not related to a BPF case field, you need record the Choice List.

The property, DocEntryStatus, is not related to the BPF case field and choice list, DocEntryStatuses, is used, and it needs to be added below:

Table 5-22 Choice List of DocEntryStatuses

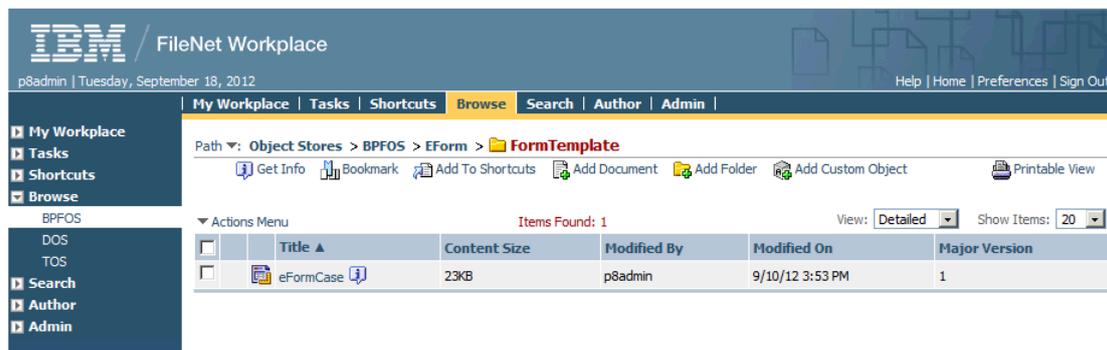
Choice List name	Type	Code	DESCRIPTION
DocEntryStatuses	Integer	0	None
		1	DocEntry
		2	Error
		3	Duplicate

5.2.10 eForms template

The eForms template file can be reused in ICM. At this step, you just collect the eforms template file.

5.2.10.1 eForms template of BPF example application

In the BPF example application, Case Management, you can get the eForms template file from Workplace, like what showed in following location.



5.3 Map BPF metadata to ICM solution artifacts

To create an ICM solution, there are six artifacts, including properties, roles, document types, Roles/In-baskets, case types and tasks, to be implemented So you need map the BPF metadata which identified in Chapter 5.2 into ICM solution artifacts.

5.3.1 Map PE region setting

The PE region setting includes Work Queues, Component Queues, User Queues, Rosters and Event Logs. BPF does not use Application Spaces in PE region. Below table shows how to map the PE region setting to ICM.

Table 5-23 BPF PE Region Setting

Region setting	In BPF	In ICM	Transition methods
Work Queues	Typically one work queue is used to one BPF Case Type	Typically one work queue for one role, so multiple work queues are used to one ICM Solution	There are two options to transition Work Queues: <ol style="list-style-type: none"> 1. Use the work queues of ICM (multiple work queues) 2. Keep the work queue same as BPF. Export work queue of BPF PE region and import to ICM.
Component Queues	BPF_Operations, CE_Operations	ICM does not involve Component Queues directly.	For BPF_Operations, it can be transitioned via Case Java APIs provided by ICM starting from version 5.1.1. For CE_Operations, no needs to be transitioned to ICM since Case Properties are saved in CE already.
User Queues	Two kinds of User Queues: Inbox, Tracker	ICM uses personal inbox.	Do not need to do any update or change for transition, since there is the same User Queues at ICM.
Rosters	Only one Roster is used for one workflow	Case Builder creates a unique Roster for each solution when solution is deployed.	It's recommended for users to take ICM Roster and update it at the transition.
Event Logs	Only one Event Log is	Case Builder creates a	It's recommended for users



	used for one workflow	unique Event Log for each solution when the solution is deployed.	to take ICM Event Log and update it at the transition.
--	-----------------------	---	--

5.3.2 Map BPF case fields to ICM case properties

Most BPF case fields can be mapped to ICM case properties directly, but the BPF specific case fields including BP8Active, Bp8CaseID, Bp8DateClosed, Bp8CaseType and workflow specific fields do not need to be mapped.

Notice that the data types between BPF and ICM are not the exactly same, the below table should be followed to do the mapping.

BPF Type	ICM Type	
Numeric	Integer	Numeric and Integer are both 4 bytes integer.
Money	Float	BPF only supports Float as Money with 2 fractions.
Boolean	Boolean	Same
Date	DateTime	BPF Date is same as ICM DateTime.
String	String	Same
Pick List	Choice List	Only static Pick List can be mapped to the Choice List in ICM
WorkflowGroup (defines a field that provides an interface to a workflow group)	It is not a data type, but an workgroup in workflow (task)	Map to workgroup on workflow (task)

Table 5-24 BPF/ICM Data Type Mapping Table

5.3.2.1 Map BPF example case fields to ICM case properties

Follow BPF/ICM data type mapping table above and map BPF example case fields to ICM case properties in the table:

Table 5-25 ICM Case Properties

Property Name	Data Type	Choice List	Max Length	Default Value
Creator	String		50	
Account Number	String		20	
Company Name	String	Company Name List	40	
Designated Rep	String		40	
Effective Date	DateTime		20	
Contract Amount	Float		20	
Document Type	Integer	Document Types	20	
Priority	String	Priorities	20	
Received Date	DateTime		20	
Comment	String		256	
Primary Case ID	Integer		20	
Expired	BOOLEAN			
Rejected	BOOLEAN			
Send To Host	BOOLEAN			
Create Case	Integer			

5.3.3 Map BPF Static Pick List to ICM Choice List

The BPF Static Pick List can be mapped to ICM Choice List, and the BPF Dynamic Pick List can be mapped to ICM via External Data Service. The type of the ICM Choice List should be same as BPF Pick List following the data type mapping.

5.3.3.1 Map BPF example Pick List to ICM Choice List

Following the mapping principle the ICM Choice Lists can be generated into the table for BPF example application.

Table 5-26 ICM Choice Lists

Choice List name	Type	Code	DESCRIPTION
Company Name List	String	IBM	IBM
		Oracle	Oracle
		Sun	Sun
		Apple	Apple
Document Types	Integer	1	Primary
		2	Support
Priorities	String	1	High
		2	Med
		3	Low
Doc Entry Statuses	Integer	0	None
		1	DocEntry
		2	Error
		3	Duplicate

5.3.4 Map BPF Dynamic Pick List

The Dynamic Pick List can be implemented in ICM via External Data Service or IBM Form. Please refer to below link to learn how to develop ICM External Data Service framework interface:

https://www.ibm.com/developerworks/mydeveloperworks/blogs/e8206aad-10e2-4c49-b00c-fe572815374/entry/sample_external_data_service_for_ibm_case_manager_by_dave_hanson6?lang=en

<http://publib.boulder.ibm.com/infocenter/casemgmt/v5r1m0/index.jsp?topic=%2Fcom.ibm.casemgmt.installing.doc%2Facmdv101.htm&resultof=%22external%22%20%22extern%22>

And refer to the forum “Solution to Use IBM Form with IBM Case Manager System” to learn how to configure IBM Form and integrate IBM Form with ICM.

https://www.ibm.com/developerworks/mydeveloperworks/blogs/e8206aad-10e2-4c49-b00c-fe572815374/entry/solution_to_use_ibm_form_with_ibm_case_manager_system22?lang=en

5.3.5 Map BPF Lookup fields

The BPF Lookup Fields can be implemented in ICM with IBM Form. You can refer to following documents to learn how to develop and use IBM Form to implement the Lookup Fields:

Using IBM Forms with Case Manager:

https://www.ibm.com/developerworks/mydeveloperworks/blogs/e8206aad-10e2-4c49-b00c-fee572815374/entry/solution_to_use_ibm_form_with_ibm_case_manager_system22?lang=en

IBM Form Lookup development Guide:

https://www.ibm.com/developerworks/mydeveloperworks/blogs/e8206aad-10e2-4c49-b00c-fee572815374/entry/how_to_use_ibm_form_lookup_function10?lang=en

5.3.6 Map BPF Roles to ICM solution Roles

The roles of BPF and ICM should be the same and can be mapped directly. You can create Roles in Case Builder.

5.3.6.1 Map BPF example Roles to ICM solution Roles

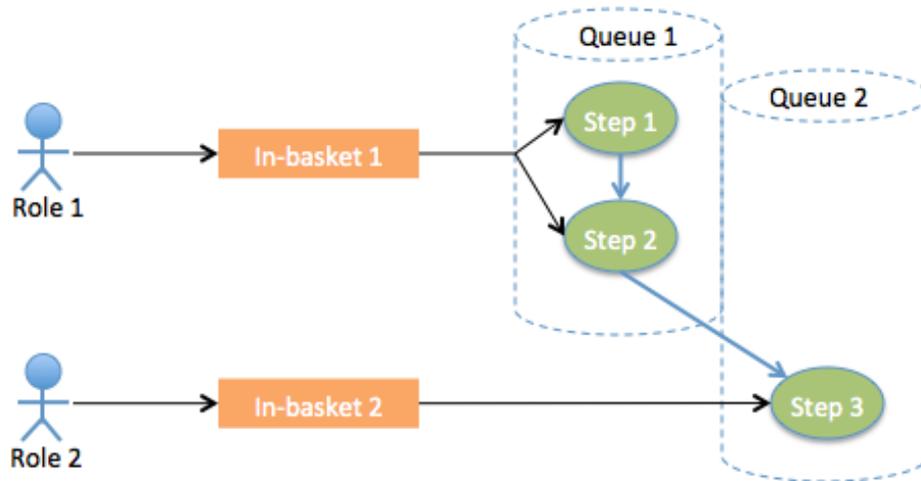
Following the mapping principle these BPF Roles can be mapped to ICM solution Roles in the table.

Table 5-27 BPF Roles

Role
Indexer
Supervisor
Approver
Reviewer

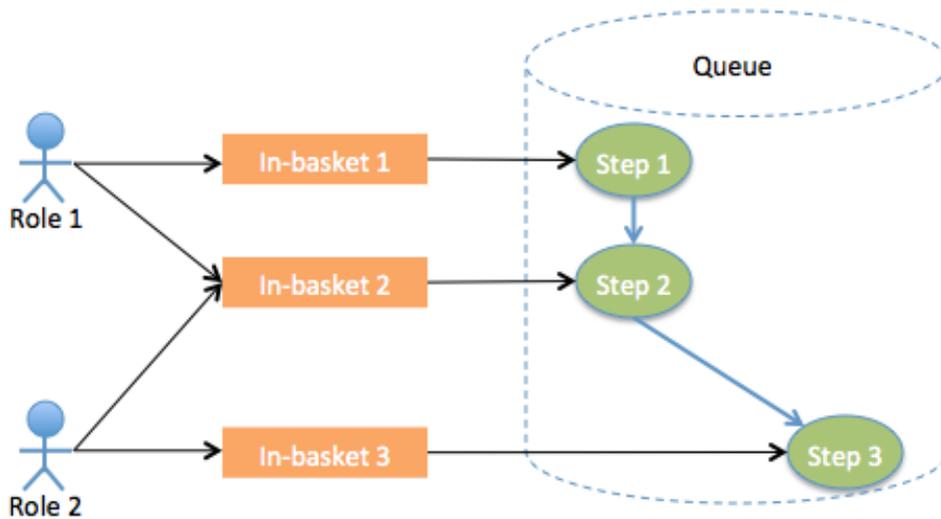
5.3.7 Map BPF In-baskets to ICM Role/Personal In-basket

In ICM Case Builder, one Role only has one Role In-basket that is built on the top of the Role's Work Queue. The relationship between the Role and the Role In-basket is 1:1 in Case Builder. Following picture shows the Role and Role In-basket relation in a typical ICM task (workflow):



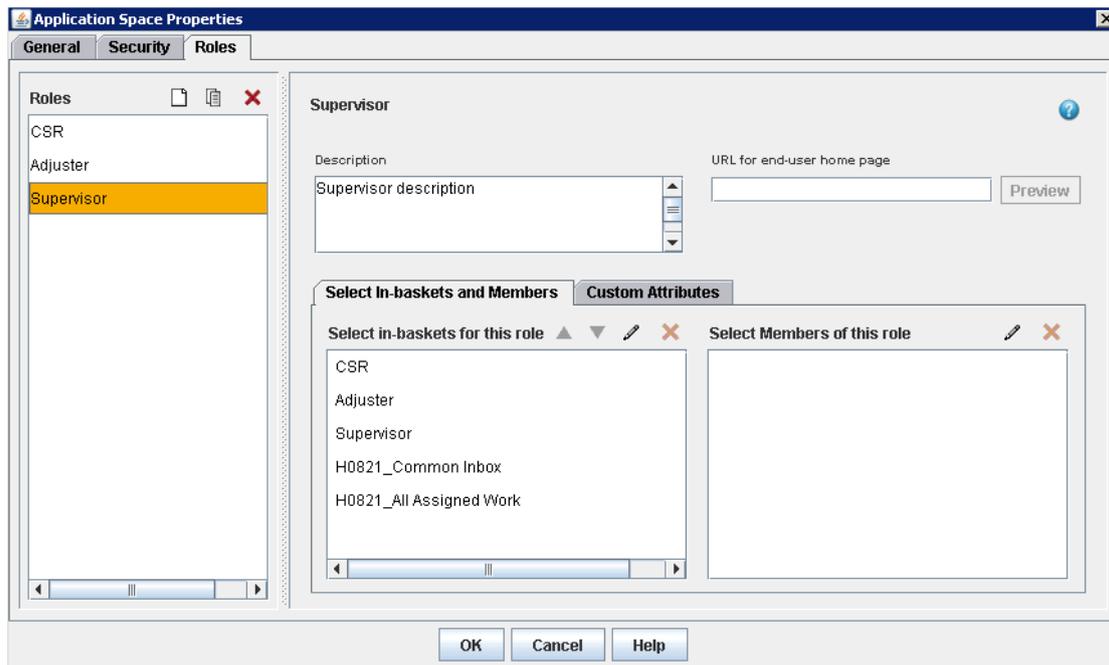
Relationship of Roles and Role In-baskets in ICM

While in BPF, the relationship between the Role and BPF In-basket is n:n. That means one Role can have multiple In-baskets, and these In-baskets can be built from single Work Queue or many Work Queues. Following picture shows a typical BPF workflow:



Relationship of Roles and In-baskets in BPF

But ICM still provide the flexibility to map Roles and Role In-baskets to n:n relation. Users can modify and configure that relation in Process Designer at editing the ICM Solution. User can easily assign more In-baskets to a specific Role at Application Space of the ICM solution, and create new in-baskets or modify existing in-basket on Work Queues.

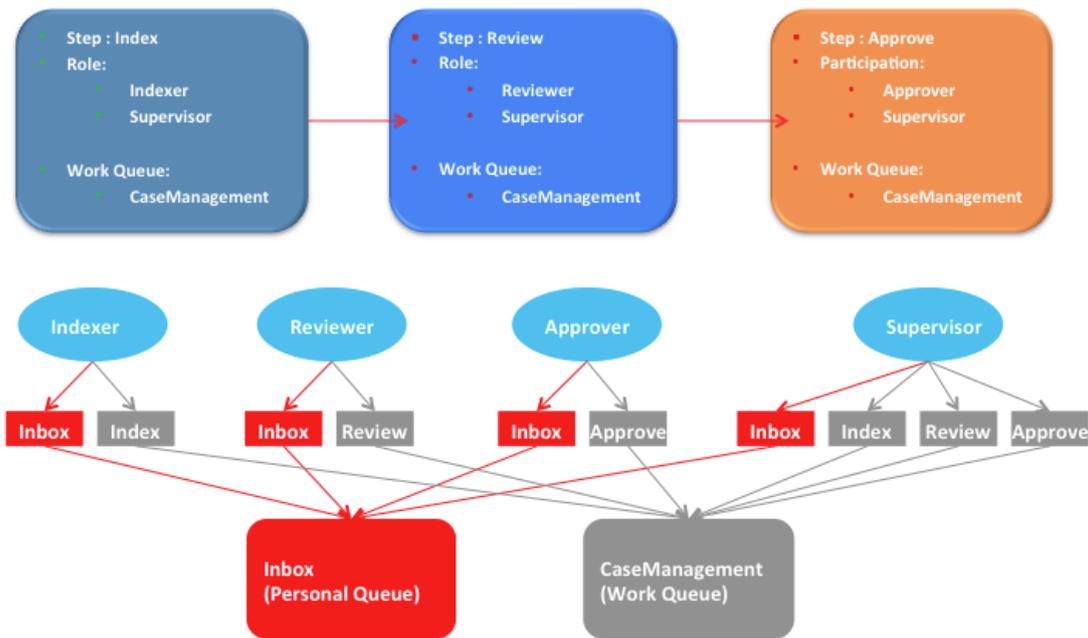


To transition the BPF in-basket to ICM, we have two options. The first option is to keep the same in-basket configuration in ICM with the same configuration in BPF. The second option is to merge all the BPF in-baskets that belong to same role to a single in-basket in ICM, but you have to make sure the merged in-baskets on same Queue in ICM. Since the first option is more simple and friendly, it is recommending taking the first option.

5.3.7.1 First option: Keep the same in-basket configuration

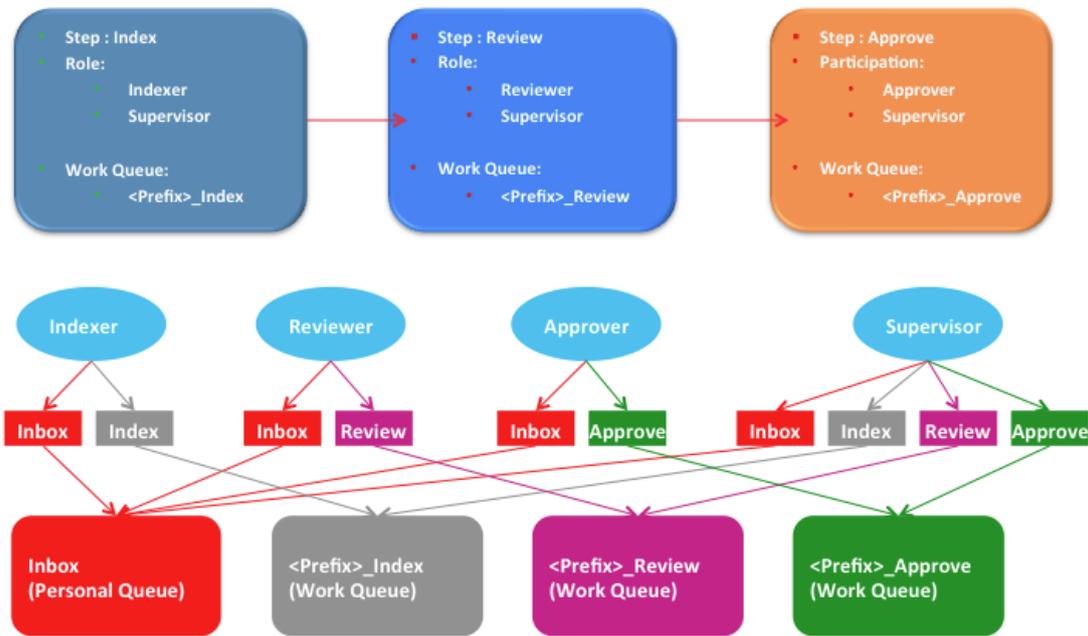
To take this option, we need to record all the in-basket setting in BPF side which we have already done in the step 'Identifying BPF metadata to be reused in the ICM solution', and then recreate all the in-baskets in Case Builder and Process Designer.

Below picture shows the example of the in-baskets configuration in BPF.



In-basket Configuration in BPF

And this picture shows the in-baskets configuration after transitioned to ICM.



In-basket Configuration in ICM

Taking the BPF example application, Case Management, and following these steps to do the Role and In-baskets transition.

1. Map In-basket Filter definition. BPF uses SQL to define the In-basket Filter, the SQL can be mapped to ICM In-basket Filter by below principle:



Table 5-28 BPF In-basket Filter SQL Definition to ICM In-basket Filter Mapping

BPF In-basket Filter SQL Definition	ICM In-basket Filter Operator
= %PARAM1%	=
<>%PARAM1%	Is not equal
LIKE '%PARAM1%'	Is like
< %PARAM1%	<
>%PARAM1%	>
<= %PARAM1%	<=
>=%PARAM1%	>=
NOT LIKE '%PARAM1%'	Is not like

For BPF example application, Case Management, the In-basket Filters can be mapped into ICM In-basket Filter as below table:

Table 5-29 ICM In-basket Filter of BPF Example

Filter name	RegularSQL	ICM filter Operator
ReceivedDate	ReceivedDate < (%CEILDATE%) and ReceivedDate >= (%FLOORDATE%)	ReceivedDate < ReceivedDate >=
CompanyName	CompanyName LIKE '%PARAM1%'	CompanyName is like
AccountNumber	AccountNumber LIKE '%PARAM1%'	AccountNumber is like
Priority	Priority LIKE '%PARAM1%'	Priority is like

2. Create role/in-basket/queue/steps mapping table in BPF. The content of the table can be found in the BPF metadata in-basket section. Below is the role/in-basket/queue/steps table of the BPF example application, Case Management.

Table 5-30 BPF In-baskets by Roles

In-basket Name	In-basket Type	Queue name	Queue Type	Workflow Steps
Role: Indexer				
Index	STANDARD	CaseManagement	Work Queue	Indexing Queue
Matching	STANDARD	CaseManagement	Work Queue	Matching Queue
My Work	STANDARD	Inbox	User Queue	
Role: Approver				
Pending Approvals	STANDARD	Inbox	User Queue	Approve Queue
Role: Reviewer				
My Work	STANDARD	Inbox	User Queue	
Review	STANDARD	CaseManagement	User Queue	Review Queue



Role: Supervisor				
Index	STANDARD	CaseManagement	Work Queue	
Review	STANDARD	CaseManagement	Work Queue	
Matching	STANDARD	CaseManagement	Work Queue	Matching Queue
My Work	STANDARD	Inbox	User Queue	

3. Select one in-basket of each role and create it in Case Builder, and other in-baskets of that role will be created in Process Designer. For example, select following in-baskets to each role and create in Case Builder:

Table 5-31 Role and In-basket Definition in ICM

Role	Role In-basket	Properties	Filters
Indexer	Index	AccountNumber (sortable) CompanyName (sortable) ReceivedDate (sortable) Priority (sort default field)	Priority ReceivedDate AccountNumber CompanyName
Supervisor	Index	AccountNumber (sortable) CompanyName (sortable) ReceivedDate (sortable) Priority (sort default field)	Priority ReceivedDate AccountNumber CompanyName
Reviewer	Review	AccountNumber (sortable) CompanyName (sortable) ReceivedDate (sortable) Priority (sort default field)	Priority ReceivedDate AccountNumber CompanyName

4. ICM provides two personal in-baskets to each solution, and you can configure each role to use which personal in-basket. In this case you can pick up the the personal in-basket for role, and update it on In-basket Filters like following table.

Table 5-32 Personal In-basket Definition in ICM

Personal In-basket	In-basket Type	Properties	Filters
My Work	Personal (Role)	AccountNumber (sortable) CompanyName (sortable) ReceivedDate (sortable) Priority (sort default field)	Priority ReceivedDate AccountNumber CompanyName

5. If a role only has the user queue In-baskets, A Role In-basket named for the role is created in Case Builder and you can update the Role In-basket on the In-basket Filter. In this case, the Approver has a user queue, and you can update the Approver's Role In-basket with the Filter in this table.

Table 5-33 Role In-basket Definition in ICM



Role	Role In-basket	Properties	Filters
Approver	Approve	AccountNumber (sortable) CompanyName (sortable) ReceivedDate (sortable) Priority (sort default field)	Priority ReceivedDate AccountNumber CompanyName

6. The CASEQUERY In-basket is a BPF specific In-basket that can be ignored.

7. After the solution created, you need re-design the BPF workflow.

7.1 Scan the role/in-basket/queue/steps table created at step 2, find all the lines which have a Workflow Step and Work Queue, and the In-basket Type is STANDARD, then you get below table:

Table 5-34 BPF In-baskets for Work Queues

Indexer				
In-basket Name	In-basket Type	Queue name	Queue Type	Workflow Steps
Role: Indexer				
Index	STANDARD	CaseManagement	Work Queue	Indexing Queue
Matching	STANDARD	CaseManagement	Work Queue	Matching Queue
Role: Reviewer				
Review	STANDARD	CaseManagement	Work Queue	Review Queue
Role: Supervisor				
Index	STANDARD	CaseManagement	Work Queue	Indexing Queue
Review	STANDARD	CaseManagement	Work Queue	Review Queue
Matching	STANDARD	CaseManagement	Work Queue	Matching Queue

7.2 Provide the New Queue Name to above table with the Role's work queue in ICM.

Table 5-35 New Queue Name to BPF In-baskets for Work Queues

In-basket Name	Old Queue name	New Queue name	Queue Type	Workflow Steps
Role: Indexer				
Index	CaseManagement	BPF_Indexer	Work Queue	Indexing Queue
Matching	CaseManagement	BPF_Indexer	Work Queue	Matching Queue
Role: Reviewer				
Review	CaseManagement	BPF_Reviewer	Work Queue	Review Queue
Role: Supervisor				
Index	CaseManagement	BPF_Supervisor	Work Queue	Indexing Queue
Review	CaseManagement	BPF_Supervisor	Work Queue	Review Queue
Matching	CaseManagement	BPF_Supervisor	Work Queue	Matching Queue

7.3 Sometimes in BPF several roles can share the same Workflow Step, in this scenario, one Workflow Step is in several role's table. Means several in-baskets for same Workflow Step. So you have to create the additional in-baskets on the Work Queue for the same Workflow Step and assign the in-baskets to each role.

In the "BPF example application, Case Management, Supervisor role shares same Workflow Steps, Indexing Queue and Matching Queue, with Indexer role, and same Workflow Step, Review Queue, as Reviewer role, so you have to update the New Work Queue name to Supervisor role like the following table.

Table 5-36 ICM In-basket Definition for Work Queues

In-basket Name	Old Queue name	New Queue name	Queue Type	Workflow Steps
Role: Indexer				
Index	CaseManagement	BPF_Indexer	Work Queue	Indexing Queue
Matching	CaseManagement	BPF_Indexer	Work Queue	Matching Queue
Role: Reviewer				
Review	CaseManagement	BPF_Reviewer	Work Queue	Review Queue
Role: Supervisor				
Index	CaseManagement	BPF_Indexer	Work Queue	Indexing Queue
Review	CaseManagement	BPF_Reviewer	Work Queue	Review Queue
Matching	CaseManagement	BPF_Indexer	Work Queue	Matching Queue

7.4 Change the Work Queue of the Workflow Step to new Work Queue in Process Designer.

Table 5-37 New Work Queue to Workflow Steps

Workflow Steps	New Queue name
Indexing Queue	BPF_Indexer
Review Queue	BPF_Reviewer
Matching Queue	BPF_Indexer

8. Create the additional in-baskets in Process Designer and assign the in-baskets to correct role. For the BPF example application, Case Manager, you can create following in-baskets and assign them to right role in Process Designer.

Table 5-38 Additional In-baskets

In-basket Name	Queue name	Queue Type	Workflow Steps	Role
Index	BPF_Indexer	Work Queue	Indexing Queue	Supervisor
Review	BPF_Reviewer	Work Queue	Review Queue	Supervisor



Matching	BPF_Indexer	Work Queue	Matching Queue	Supervisor
Matching	BPF_Indexer	Work Queue	Matching Queue	Indexer
My Work	Inbox	User Queue		Supervisor
My Work	Inbox	User Queue		Indexer
My Work	Inbox	User Queue		Reviewer
Pending Approvals	Inbox	User Queue		Approver

9. Merge the above tables and get the ICM In-baskets configuration to Roles.

Table 5-39 ICM In-baskets Configuration

In-basket Name	In-basket Type	Role	Queue name	Queue Type	WF Steps	Create In
Index	Role	Indexer	BPF_Indexer	Work Queue	Indexing Queue	Case Builder
Matching	Role	Indexer	BPF_Indexer	Work Queue	Matching Queue	Process Designer
My Work	Personal	Indexer	Inbox	User Queue		Case Builder
Approve	Role	Approver	BPF_Approver	Work Queue	Approve Queue	Case Builder
Pending Approvals	Personal	Approver	Inbox	User Queue		Case Builder
Review	Role	Reviewer	BPF_Reviewer	Work Queue	Review Queue	Case Builder
My Work	Personal	Reviewer	Inbox	User Queue		Case Builder
Index	Role	Supervisor	BPF_Indexer	Work Queue	Indexing Queue	Process Designer
Matching	Role	Supervisor	BPF_Indexer	Work Queue	Matching Queue	Process Designer
Review	Role	Supervisor	BPF_Reviewer	Work Queue	Review Queue	Process Designer
My Work	Personal	Supervisor	Inbox	User Queue		Case Builder

10. List the Case Properties and Filters of each in-basket.

Table 5-40 ICM In-basket Settings

In-basket Name	Role	Layout	Columns	Filters
Index	Indexer	AccountNumber CompanyName	AccountNumber (sortable)	Priority ReceivedDate



		DesignatedRep EffectiveDate ContractAmount ReceivedDate Priority Comment SendToHost Rejected PrimaryCaselD Expired DocumentType	CompanyName (sortable) ReceivedDate (sortable) Priority (sort default field)	
My Work	Indexer	AccountNumber CompanyName DesignatedRep EffectiveDate ContractAmount ReceivedDate Priority Comment SendToHost Rejected PrimaryCaselD Expired DocumentType	AccountNumber (sortable) CompanyName (sortable) ReceivedDate (sortable) Priority (sort default field)	Priority ReceivedDate AccountNumber CompanyName
Index	Supervisor	AccountNumber CompanyName DesignatedRep EffectiveDate ContractAmount ReceivedDate Priority Comment DocumentType LockUser	AccountNumber (sortable) CompanyName (sortable) ReceivedDate (sortable) Priority (sort default field) LockUser (sortable)	Priority ReceivedDate AccountNumber CompanyName
Review	Supervisor	AccountNumber CompanyName DesignatedRep EffectiveDate ContractAmount ReceivedDate Priority Comment	AccountNumber (sortable) CompanyName (sortable) ReceivedDate (sortable) Priority (sort default field)	Priority ReceivedDate AccountNumber CompanyName



		DocumentType Creator		
Matching	Indexer	AccountNumber CompanyName DesignatedRep EffectiveDate ContractAmount ReceivedDate Priority Comment SendToHost Rejected Expired DocumentType	AccountNumber (sortable) CompanyName (sortable) ReceivedDate (sortable) Priority (sort default field)	Priority ReceivedDate AccountNumber CompanyName
Matching	Supervisor	DocumentType AccountNumber CompanyName DesignatedRep EffectiveDate ContractAmount ReceivedDate Priority Comment	AccountNumber (sortable) CompanyName (sortable) ReceivedDate (sortable) Priority (sort default field)	Priority ReceivedDate AccountNumber CompanyName
My Work	Supervisor	AccountNumber CompanyName DesignatedRep EffectiveDate ContractAmount ReceivedDate Priority Comment Expired DocumentType	AccountNumber (sortable) CompanyName (sortable) ReceivedDate (sortable) Priority (sort default field)	Priority ReceivedDate AccountNumber CompanyName
Approve	Approver	AccountNumber CompanyName DesignatedRep EffectiveDate ContractAmount ReceivedDate Priority Comment DocumentType	AccountNumber (sortable) CompanyName (sortable) ReceivedDate (sortable) Priority (sort default field)	Priority ReceivedDate AccountNumber CompanyName



		Rejected Expired		
Pending Approvals	Approver	AccountNumber CompanyName DesignatedRep EffectiveDate ContractAmount ReceivedDate Priority Comment DocumentType Rejected Expired	AccountNumber (sortable) CompanyName (sortable) ReceivedDate (sortable) Priority (sort default field)	Priority ReceivedDate AccountNumber CompanyName
My Work	Reviewer	AccountNumber CompanyName DesignatedRep EffectiveDate ContractAmount ReceivedDate Priority Comment Rejected Expired DocumentType	AccountNumber (sortable) CompanyName (sortable) ReceivedDate (sortable) Priority (sort default field)	Priority ReceivedDate AccountNumber CompanyName
Review	Reviewer	AccountNumber CompanyName DesignatedRep EffectiveDate ContractAmount ReceivedDate Priority Comment DocumentType Creator	AccountNumber (sortable) CompanyName (sortable) ReceivedDate (sortable) Priority (sort default field)	Priority ReceivedDate AccountNumber CompanyName

5.3.7.2 Second option: Merge all the BPF in-baskets to same role

User can merge all in-baskets belongs to same role and merge all of those in-baskets and create a single in-basket to the role. But you have to make sure all the merged in-baskets are

in same Work Queue or User Queue. You may refer the steps in the first option to identify BPF roles/in-baskets/queues/steps and merge the BPF in-baskets to same role and create the merged in-basket in Case Builder or Process Designer.

5.3.8 Map BPF Document Class to ICM Case Document Type

The BPF Document Class can be mapped to ICM Case Document Type directly. But the BPF specific property has to be removed at the transition.

5.3.8.1 Document Class of BPF example application

Follow the mapping principle the properties of Case Document Type of ICM solution can be generated in below table.

Table 5-41 Case Document Type of ICM solution

Case Document Type		Case Management Documents			
DOCUMENT Properties					
Name	Type	Default Value	Is Required	Choice List	Hidden
DocEntryStatus	Integer		No	DocEntryStatuses	No
DocumentType	Integer		No		No
Priority	String		No	Priority	No
ReceivedDate	DateTime		No		No
CompanyName	String		No		No
ContractAmount	Float		No		No
EffectiveDate	DateTime		No		No
AccountN umber	String		No		No

5.3.9 Map BPF Case Type to ICM Case Type

The BPF Case Type can be mapped to ICM Case Type directly. And you can configure Case Views and Case Folder structure in Case Builder.

- Case Type Properties (Select all the case fields in Case Fields Table which defined to BPF Case Type)
- Case Summary View (Select the case properties to be displayed at Case Summary View)
- Case Data View (Select all the case properties of the Case Type)
- Case Search View (Select the case properties to be searched for case)
- Case Folder structure (BPF has no this feature. You can set up the default Case Folder structure to the Case Type.)

5.3.9.1 Case Type of BPF example application

Follow the mapping principle the Case Type of ICM solution can be generate in below table.

Table 5-42 Case Type of ICM solution

Case Type name	Case Management
Case Type Properties	Select all the Solution Properties
Case Summary View	Priority ReceivedDate EffectiveDate AccountNumber CompanyName
Case Data View	Creator AccountNumber CompanyName DesignatedRep EffectiveDate ContractAmount DocumentType Priority ReceivedDate Comment PrimaryCaseID Expired Rejected SendToHost
Case Search View	Priority ReceivedDate EffectiveDate AccountNumber CompanyName
Case Folder structure	Default

5.3.10 Map BPF workflow to ICM solution task

The BPF workflow is the FileNet BPM workflow, which contains steps/properties/queues, and ICM solution task provide richer process (workflow) model, including automatic task, manual task, ad-hoc task, compound task, set, hidden, task preconditions and many other advanced

features to satisfy business requirement to process designing. Users can fully leverage the ICM task model to design business process, and refer ICM information center to learn the full capability of ICM task model.

To transition BPF workflow to ICM solution task, user can have two options. One option is to reuse the existing BPF workflow in ICM solution by creating task with FileNet BPM process. Another option is to redesign BPF workflow at Case Builder by create a pure ICM task with the rich capability of ICM task model.

5.3.10.1 Workflow of BPF example application

For the BPF example application, Case Management, you can create a Task with FileNet BPM process by reusing existing BPF workflow, CaseManagement, or create a normal Task and redesign the BPF workflow in Case Builder. The steps are provided in later chapter.

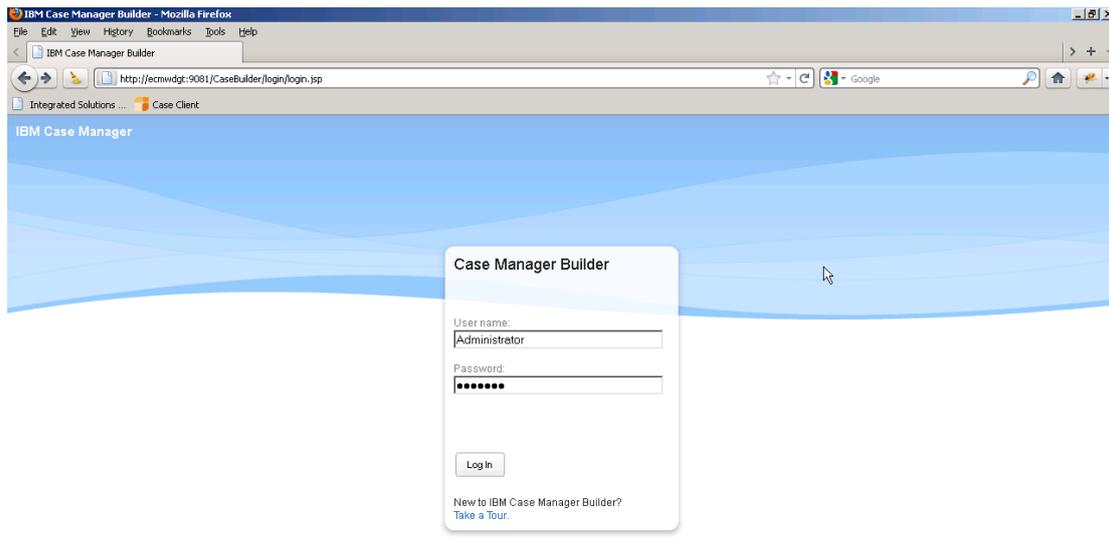
5.4 Create ICM solution by reusing BPF metadata

In this chapter, the steps are provided to create the ICM solution by reusing the BPF metadata. This chapter covers the following topics, which takes the BPF application, Case Management, as example to demonstrate the steps.

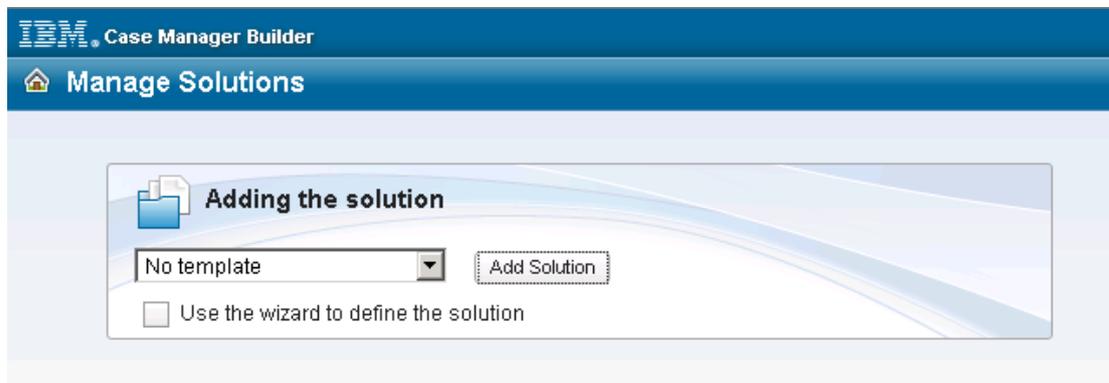
- Create the ICM solution
- Create Solution Properties, Roles, Document Types and Personal Inboxes
- Create and configure Case Types

5.4.1 Create ICM solution

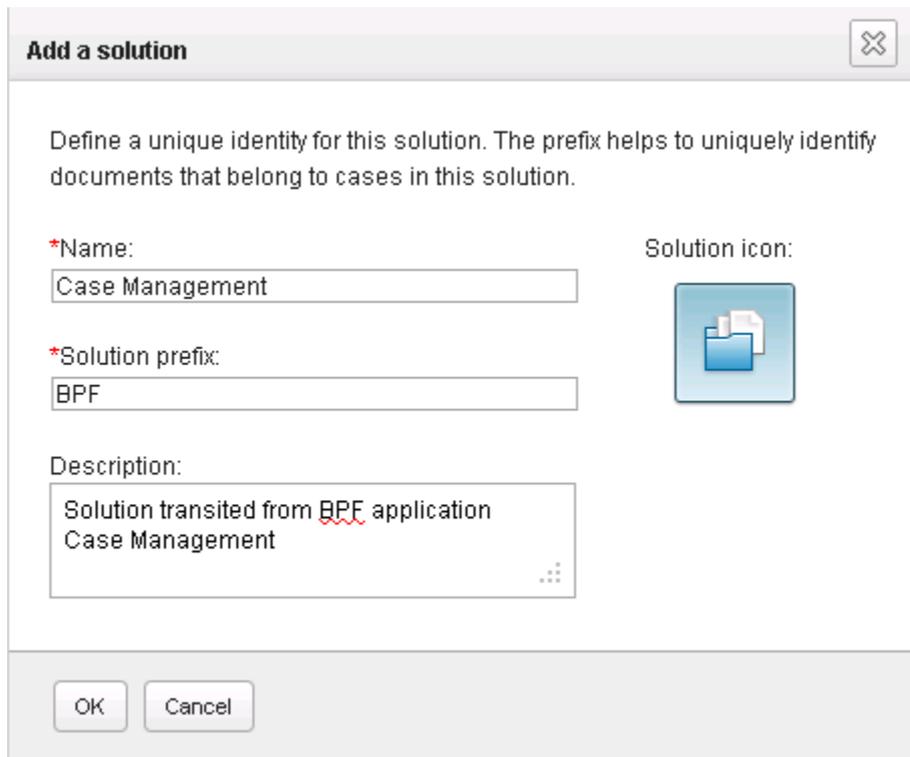
1. Login into Case Manager Builder using a web browser and enter the user name and password to log in.



2. You will see the summary page.
3. Select Adding new solution.
 - 3.1 In the Adding new Solution panel, make sure the radio box for from a blank template is selected.
 - 3.2 Leave the checkbox for Use the wizard to define the solution unchecked.
 - 3.3 Click the Add Solution button.



4. The Adding a solution dialog box will be displayed.
 - 4.1 Enter "Case Management" for the Name.
 - 4.2 Enter "BPF" for the Solution prefix.
 - 4.3 Enter "Solution transitioned from BPF Application Case Management" for the Description.
 - 4.4 Hover over the Solution icon: right side to reveal a small black triangle. Click the triangle
To reveal the palette of possible icons for your solution.
 - 4.5 Click OK to add your solution.



Add a solution ✕

Define a unique identity for this solution. The prefix helps to uniquely identify documents that belong to cases in this solution.

*Name:

*Solution prefix:

Description:

Solution icon: 

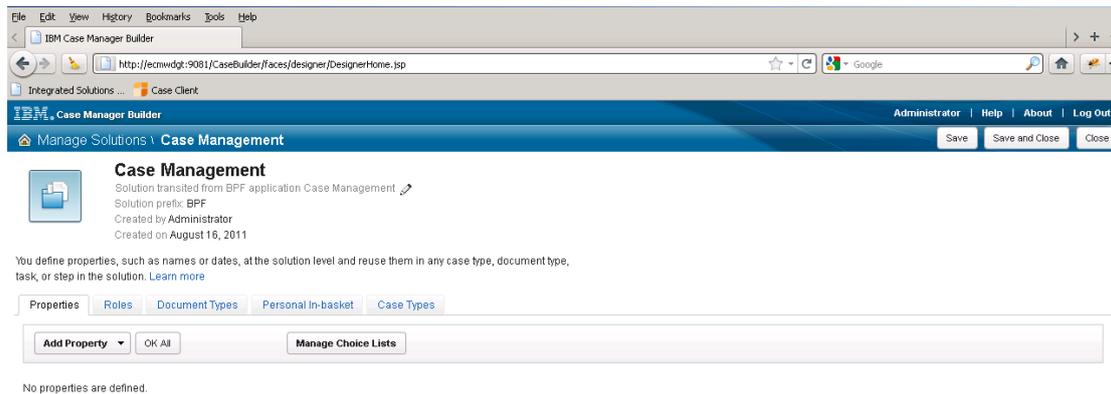
At this point, you will be taken to the main screen for the Case Manager Builder, where you can enter properties, document types, roles and case types. In the following sections, you will create each of these assets.

Now you've created the ICM solution, and next step is to create solution properties, roles and document types that are related to the case management solution.

5.4.2 Create Properties, Roles, In-baskets, and Document Types for the solution

5.4.2.1 Creating Properties

Edit the solution created at above step in Case Builder.



In the solution you can see the properties, roles, document types and case types. Go to Properties tab to create case properties.

Before add property, you need create the choice lists that would be used to properties. You can get the choice list to be created in previous chapter of ‘map BPF Case Fields to ICM Case Properties’. You need create below choice lists by clicking the button “Manage Choice Lists”.

Table 5-43 Choice List of ICM Solution

Choice List name	Type	Code	DESCRIPTION
Company Name List	String	IBM	IBM
		Oracle	Oracle
		Sun	Sun
		Apple	Apple
Document Types	Integer	1	Primary
		2	Support
Priorities	String	1	High
		2	Med
		3	Low
Doc Entry Statuses	Integer	0	None
		1	DocEntry
		2	Error
		3	Duplicate

You can get the case properties to be created from the previous chapter, Map BPF case fields to ICM properties.

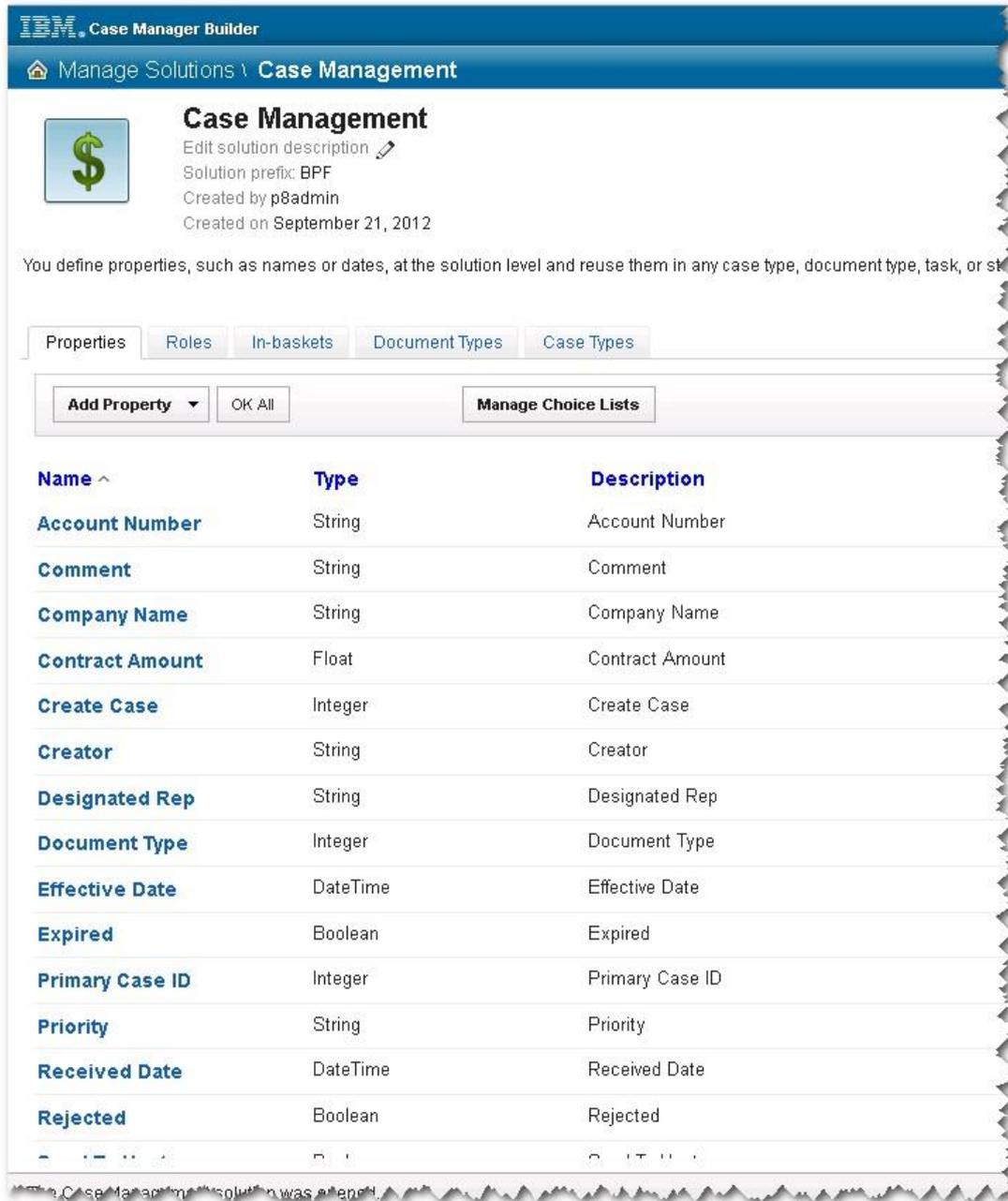
Table 5-44 Case Properties of ICM Solution

Property Name	Data Type	Choice List	Max Length	Default Value
Creator	String		50	
Account Number	String		20	



Company Name	String	CompanyNameList	40	
Designated Rep	String		40	
Effective Date	DateTime		20	
Contract Amount	Float		20	
Document Type	Integer	Document Types	20	
Priority	String	Priorities	20	
Received Date	DateTime		20	
Comment	String		256	
Primary Case ID	Integer		20	
Expired	Boolean			
Rejected	Boolean			
Send To Host	Boolean			
Create Case	Integer			

These are all the case properties in ICM solution.



IBM Case Manager Builder

Manage Solutions \ Case Management

Case Management
 Edit solution description 
 Solution prefix: BPF
 Created by p8admin
 Created on September 21, 2012

You define properties, such as names or dates, at the solution level and reuse them in any case type, document type, task, or st

Properties Roles In-baskets Document Types Case Types

Add Property OK All Manage Choice Lists

Name ^	Type	Description
Account Number	String	Account Number
Comment	String	Comment
Company Name	String	Company Name
Contract Amount	Float	Contract Amount
Create Case	Integer	Create Case
Creator	String	Creator
Designated Rep	String	Designated Rep
Document Type	Integer	Document Type
Effective Date	DateTime	Effective Date
Expired	Boolean	Expired
Primary Case ID	Integer	Primary Case ID
Priority	String	Priority
Received Date	DateTime	Received Date
Rejected	Boolean	Rejected

The Case Management solution was altered.

5.4.2.2 Create Roles & Role In-basket

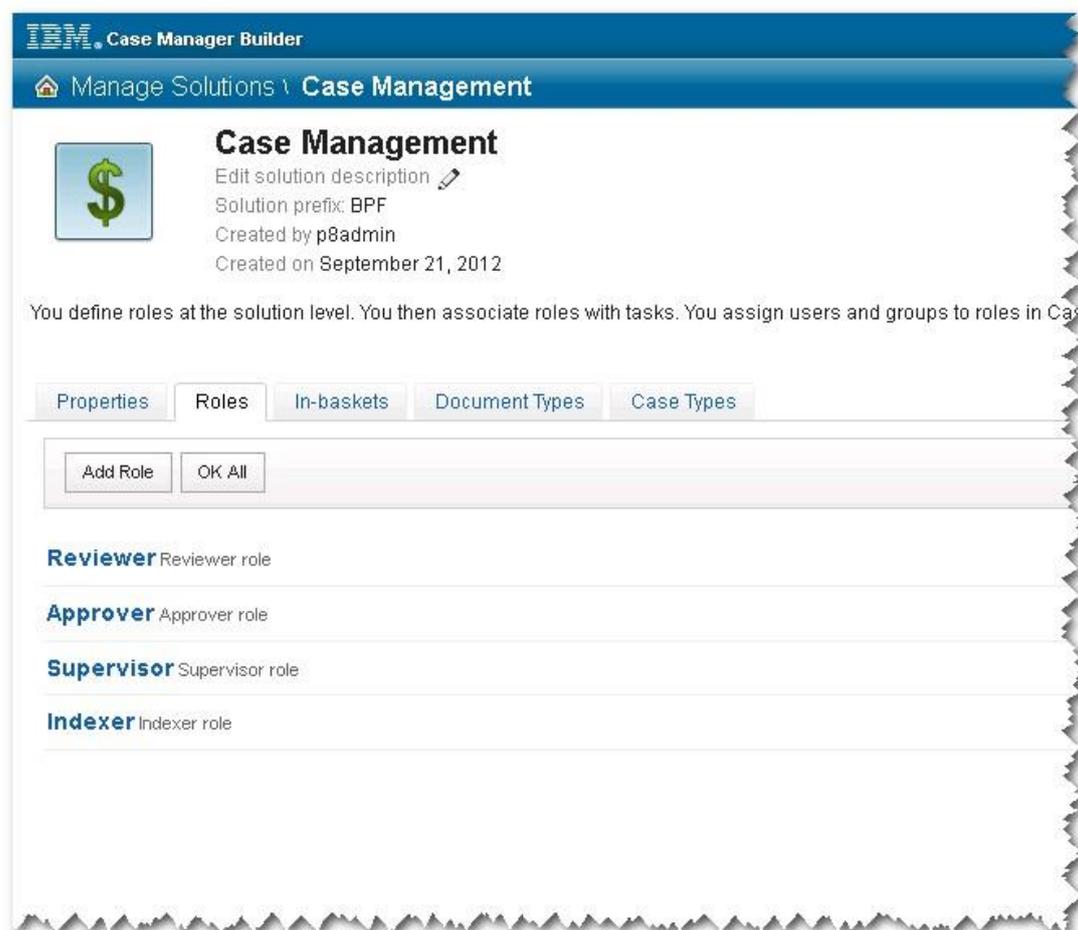
Now you need create roles and role in-basket for the solution. As what discussed in the chapter 'Map BPF Roles to ICM solution Roles' and 'Map BPF In-baskets to ICM Role/Personal In-basket', user has two options, keep same in-basket configuration or merge

all in-baskets to same role. If user take the first option, user can create one of the role's in-basket, in Case Builder and the other in-baskets in Process Designer. For the BPF example application, Case Management, user can create the following roles and role in-baskets at Roles and In-baskets tab.

Table 5-45 ICM Roles

Role
Indexer
Supervisor
Approver
Reviewer

These are all the Roles in ICM.



IBM Case Manager Builder

Manage Solutions \ **Case Management**

Case Management

Edit solution description 

Solution prefix: BPF

Created by p8admin

Created on September 21, 2012

You define roles at the solution level. You then associate roles with tasks. You assign users and groups to roles in Cas

Properties Roles In-baskets Document Types Case Types

Add Role OK All

Reviewer Reviewer role

Approver Approver role

Supervisor Supervisor role

Indexer Indexer role

After created the Roles you can see the default in-baskets created to Roles at In-baskets tab, and you need to modify the names of the in-baskets according to the ICM In-basket Configuration Table and create In-baskets Filters to each in-basket.

Table 5-46 ICM In-baskets Configuration

In-basket Name	In-basket Type	Role	Queue name	Queue Type	WF Steps	Create In
Index	Role	Indexer	BPF_Indexer	Work Queue	Indexing Queue	Case Builder
My Work	Personal	Indexer	Inbox	User Queue		Case Builder
Approve	Role	Approver	BPF_Approver	Work Queue	Approve Queue	Case Builder
Pending Approvals	Personal	Approver	Inbox	User Queue		Case Builder
Review	Role	Reviewer	BPF_Reviewer	Work Queue	Review Queue	Case Builder
My Work	Personal	Reviewer	Inbox	User Queue		Case Builder
My Work	Personal	Supervisor	Inbox	User Queue		Case Builder

Table 5-47 In-basket Filter Configuration

Role	Role In-basket	Properties	Filters
Indexer	Index	AccountNumber (sortable) CompanyName (sortable) ReceivedDate (sortable) Priority (sort default field)	Priority ReceivedDate AccountNumber CompanyName
Approver	Approve	AccountNumber (sortable) CompanyName (sortable) ReceivedDate (sortable) Priority (sort default field)	Priority ReceivedDate AccountNumber CompanyName
Reviewer	Review	AccountNumber (sortable) CompanyName (sortable) ReceivedDate (sortable) Priority (sort default field)	Priority ReceivedDate AccountNumber CompanyName

Table 5-48 ICM In-basket Filter Definition

Filter name	ICM filter Operator
ReceivedDate	ReceivedDate < ReceivedDate >=
CompanyName	CompanyName is like
AccountNumber	AccountNumber is like
Priority	Priority is like

And after you imported BPF workflow and created the ICM task, you need come back to created additional in-baskets to Roles in Process Designer.

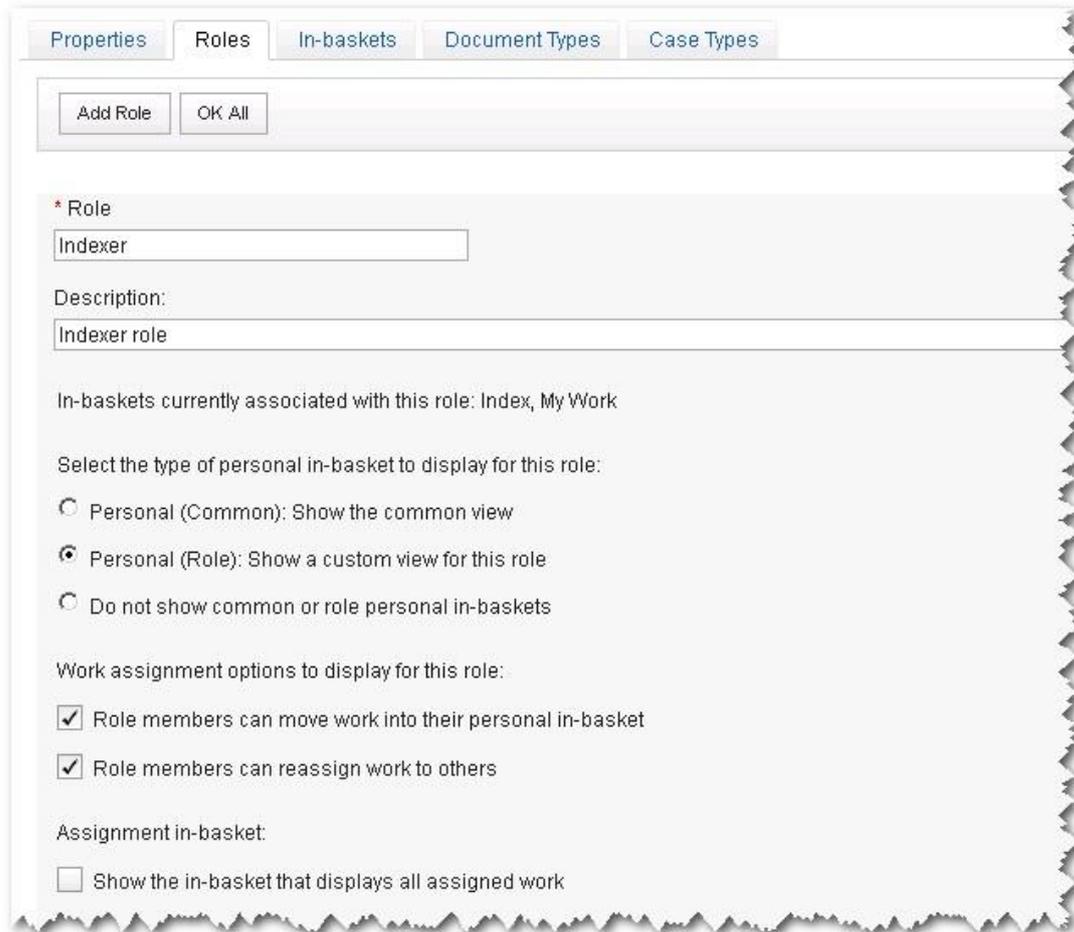
Table 5-49 Additional ICM In-baskets Configuration

In-basket Name	In-basket Type	Role	Queue name	Queue Type	WF Steps	Create In
Matching	Role	Indexer	BPF_Indexer	Work Queue	Matching Queue	Process Designer
Index	Role	Supervisor	BPF_Indexer	Work Queue	Indexing Queue	Process Designer
Matching	Role	Supervisor	BPF_Indexer	Work Queue	Matching Queue	Process Designer
Review	Role	Supervisor	BPF_Reviewer	Work Queue	Review Queue	Process Designer

If user take second option to merge all in-baskets to same role, user have to make sure each merged in-basket to created on right Work Queue or User Queue in either Case Builder or Process Designer.

Now you can take below step to create Roles & Role In-basket. Here take the role Indexer for example.

1. Click the Roles tab.
2. Click the Add Role button.
 - 2.1 Enter Indexer in the Role field.
 - 2.2 Enter a description for the role.



Properties Roles In-baskets Document Types Case Types

Add Role OK All

* Role
Indexer

Description:
Indexer role

In-baskets currently associated with this role: Index, My Work

Select the type of personal in-basket to display for this role:

Personal (Common): Show the common view

Personal (Role): Show a custom view for this role

Do not show common or role personal in-baskets

Work assignment options to display for this role:

Role members can move work into their personal in-basket

Role members can reassign work to others

Assignment in-basket:

Show the in-basket that displays all assigned work

3. Click the In-baskets tab to edit In-baskets.
 - 3.1 Rename the in-basket name to Index.
 - 3.2 Click the Add Property button. Select Case Properties of the in-basket, and you can refer the following ICM In-basket Settings table. The PE Step Name should be added as a property.
 - 3.3 Set the Sortable columns.
 - 3.4 Set the Sort Order
 - 3.5 Set the Sort Default property.
 - 3.6 Set the In-basket Filters.

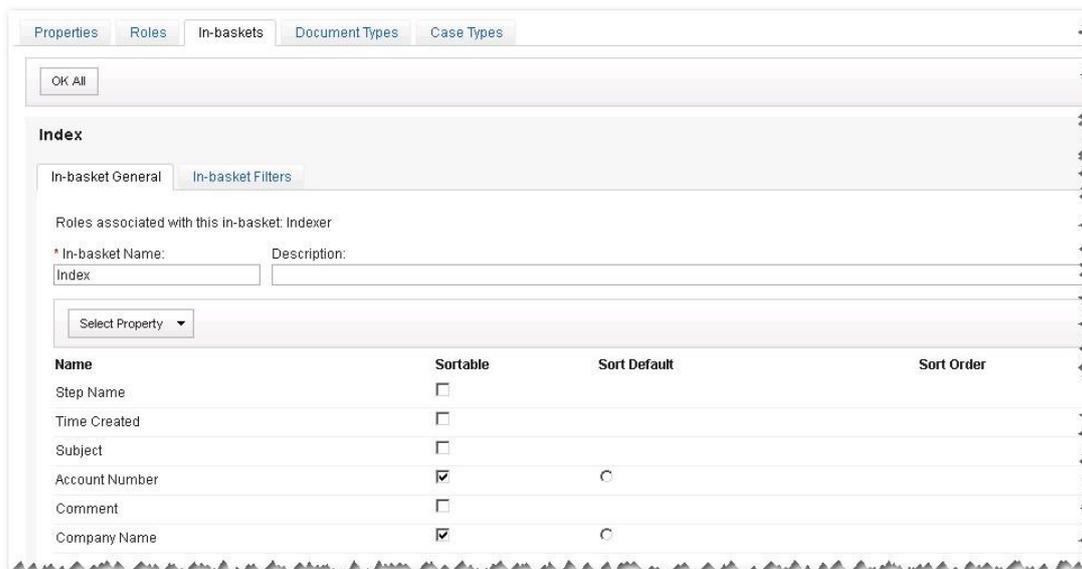


Table 5-50 ICM In-basket Settings

In-basket Name	Role	Case Properties	Columns	Filters
Index	Indexer	AccountNumber CompanyName DesignatedRep EffectiveDate ContractAmount ReceivedDate Priority Comment SendToHost Rejected PrimaryCaseID Expired DocumentType	AccountNumber (sortable) CompanyName (sortable) ReceivedDate (sortable) Priority (sort default field)	Priority ReceivedDate
My Work	Indexer	AccountNumber CompanyName DesignatedRep EffectiveDate ContractAmount ReceivedDate Priority Comment SendToHost Rejected	AccountNumber (sortable) CompanyName (sortable) ReceivedDate (sortable) Priority (sort default field)	Priority ReceivedDate AccountNumber CompanyName



		PrimaryCaseID Expired DocumentType		
Index	Supervisor	AccountNumber CompanyName DesignatedRep EffectiveDate ContractAmount ReceivedDate Priority Comment DocumentType LockUser	AccountNumber (sortable) CompanyName (sortable) ReceivedDate (sortable) Priority (sort default field) LockUser (sortable)	Priority ReceivedDate AccountNumber CompanyName
Review	Supervisor	AccountNumber CompanyName DesignatedRep EffectiveDate ContractAmount ReceivedDate Priority Comment DocumentType Creator	AccountNumber (sortable) CompanyName (sortable) ReceivedDate (sortable) Priority (sort default field)	Priority ReceivedDate AccountNumber CompanyName
Matching	Indexer	AccountNumber CompanyName DesignatedRep EffectiveDate ContractAmount ReceivedDate Priority Comment SendToHost Rejected Expired DocumentType	AccountNumber (sortable) CompanyName (sortable) ReceivedDate (sortable) Priority (sort default field)	Priority ReceivedDate AccountNumber CompanyName
Matching	Supervisor	DocumentType AccountNumber CompanyName DesignatedRep EffectiveDate ContractAmount ReceivedDate	AccountNumber (sortable) CompanyName (sortable) ReceivedDate (sortable) Priority (sort default	Priority ReceivedDate AccountNumber CompanyName



		Priority Comment	field)	
My Work	Supervisor	AccountNumber CompanyName DesignatedRep EffectiveDate ContractAmount ReceivedDate Priority Comment Expired DocumentType	AccountNumber (sortable) CompanyName (sortable) ReceivedDate (sortable) Priority (sort default field)	Priority ReceivedDate AccountNumber CompanyName
Approve	Approver	AccountNumber CompanyName DesignatedRep EffectiveDate ContractAmount ReceivedDate Priority Comment DocumentType Rejected Expired	AccountNumber (sortable) CompanyName (sortable) ReceivedDate (sortable) Priority (sort default field)	Priority ReceivedDate AccountNumber CompanyName
Pending Approvals	Approver	AccountNumber CompanyName DesignatedRep EffectiveDate ContractAmount ReceivedDate Priority Comment DocumentType Rejected Expired	AccountNumber (sortable) CompanyName (sortable) ReceivedDate (sortable) Priority (sort default field)	Priority ReceivedDate AccountNumber CompanyName
My Work	Reviewer	AccountNumber CompanyName DesignatedRep EffectiveDate ContractAmount ReceivedDate Priority Comment	AccountNumber (sortable) CompanyName (sortable) ReceivedDate (sortable) Priority (sort default field)	Priority ReceivedDate AccountNumber CompanyName



		Rejected Expired DocumentType		
Review	Reviewer	AccountNumber CompanyName DesignatedRep EffectiveDate ContractAmount ReceivedDate Priority Comment DocumentType Creator	AccountNumber (sortable) CompanyName (sortable) ReceivedDate (sortable) Priority (sort default field)	Priority ReceivedDate AccountNumber CompanyName

5.4.2.3 Create Case Document Type

The Case Document Type is defined in the chapter Map BPF Document Class to ICM Case Document Type, and you can add the following Case Document Type to the ICM solution.

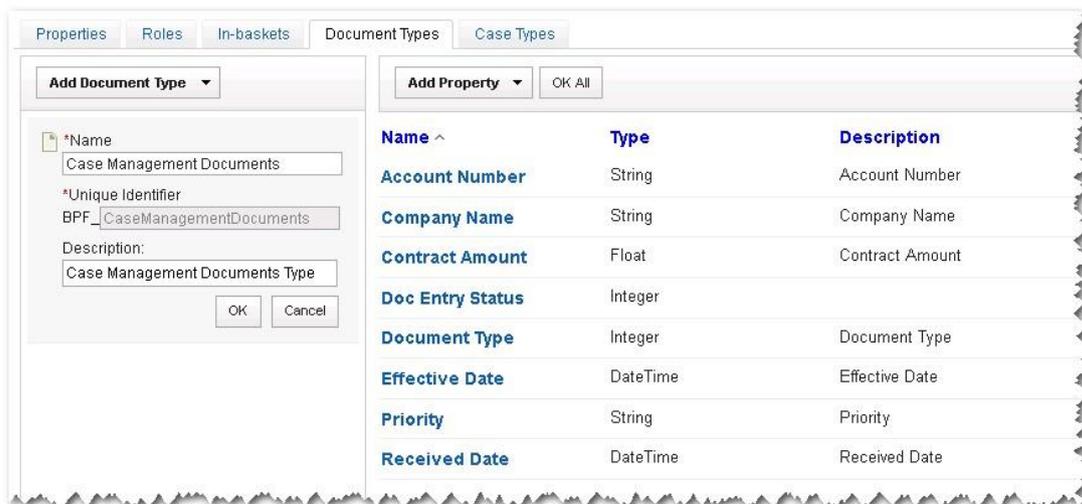
Table 5-51 Case Document Type Definition

DOCUMENT CLASS NAME		Case Management Documents			
DOCUMENT Properties					
Case Property	Type	Default Value	Is Required	Choice List	Hidden
Doc Entry Status	Integer		No	DocEntryStatuses	No
Document Type	Integer		No		No
Priority	String		No	Priority	No
Received Date	DateTime		No		No
Company Name	String		No		No
Contract Amount	Float		No		No
Effective Date	DateTime		No		No
Account Number	String		No		No

Follow below steps to create the Case Document Type:

1. Click the Document Types tab In the Case Management solution
2. Click the Add Document Type button to reveal two options: New and Reuse Document Type.
 - 2.1 Choose New.

- 2.2 Enter Case Management Documents in the Name field.
- 2.3 Leave the Unique Identifier field with the default value.
- 2.4 Provide the document type description.
- 2.5 Click OK.
3. Now create properties for the Case Document Type. There are two kinds of Case Document Property. One is Case Property, and this kind of property can be added by selecting Existing properties. Another is Case Document Property, and this kind of property can be added by selecting creating New properties.
 - 3.1 The DocumentType, Priority, ReceivedDate, CompanyName, ContractAmount, EffectiveDate, AccountNumber are case field properties, add these properties by choice existing properties. Set the Required, Hidden check box and Default Value as the Document Type define table defined.
 - 3.2 The DocEntryStatus is not case field properties, add it by create new one property. Set the Required, Hidden check box and Default Value as the Document Type define table defined.
 - 3.3 Click OK.
4. Click Save in the upper right of the Case Manager Builder window to save the solution.



Name ^	Type	Description
Account Number	String	Account Number
Company Name	String	Company Name
Contract Amount	Float	Contract Amount
Doc Entry Status	Integer	
Document Type	Integer	Document Type
Effective Date	DateTime	Effective Date
Priority	String	Priority
Received Date	DateTime	Received Date

5.4.3 Create and configure Case Types

A solution will have one or more case types. A case type is a particular type of case that gets created within the solution. For the BPF example application, one Case Type, Case Management, need to be created in the solution.

Following components need to be configured to a Case Type:

- Case properties.
- Case Summary View, Case Search View and Case Detail View
- Case Folder structure

- Case Tasks

You can get the Case Type definition from the chapter Map BPF Case Type to ICM Case Type.

Table 5-52 Case Type Definition

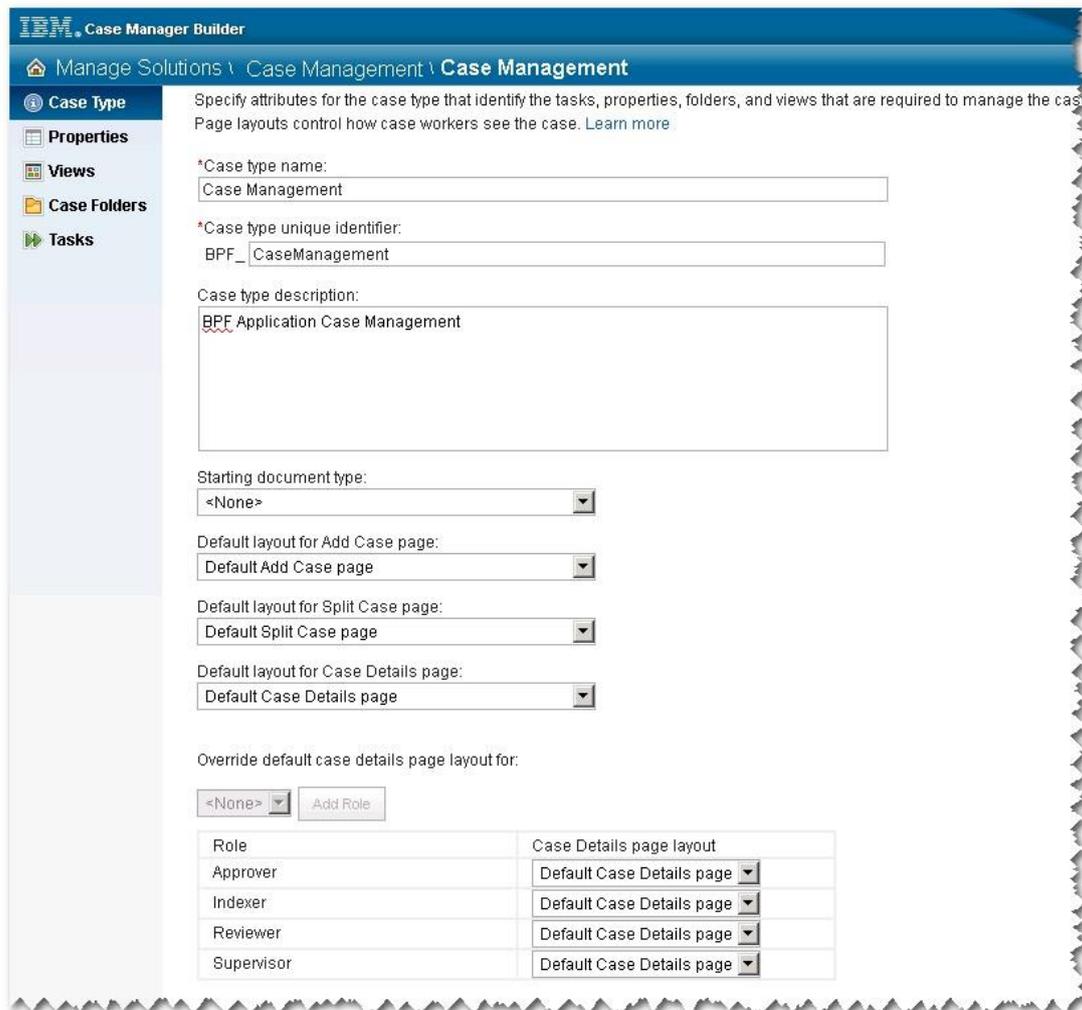
Case Type Name	Case Management
Case Type Properties	Creator AccountNumber CompanyName DesignatedRep EffectiveDate ContractAmount DocumentType Priority ReceivedDate Comment PrimaryCaseID Expired Rejected SendToHost
Case Summary View	Priority ReceivedDate EffectiveDate AccountNumber CompanyName
Case Detail View	All Case Properties of the Case Type
Case Search View	Priority ReceivedDate EffectiveDate AccountNumber CompanyName
Folder structure	Default

5.4.3.1 Create Case Type

Go to the Case Types tab of the ICM solution.

1. Click the Add Case Type button.

2. Enter “Case Management” in the Case type name field.
3. Leave the Case type unique identifier field with the default value.
4. Enter “BPF Application Case Management” as the Case type description.
5. Verify the Starting document type is <none>
6. Leave the page settings on their defaults for now. You will come back to this later.
7. Click Save in the upper right corner of the page to save your case type.



IBM Case Manager Builder

Manage Solutions \ Case Management \ Case Management

Case Type Specify attributes for the case type that identify the tasks, properties, folders, and views that are required to manage the case. Page layouts control how case workers see the case. [Learn more](#)

Properties

Views

Case Folders

Tasks

*Case type name:
Case Management

*Case type unique identifier:
BPF_CaseManagement

Case type description:
BPF Application Case Management

Starting document type:
<None>

Default layout for Add Case page:
Default Add Case page

Default layout for Split Case page:
Default Split Case page

Default layout for Case Details page:
Default Case Details page

Override default case details page layout for:

<None> Add Role

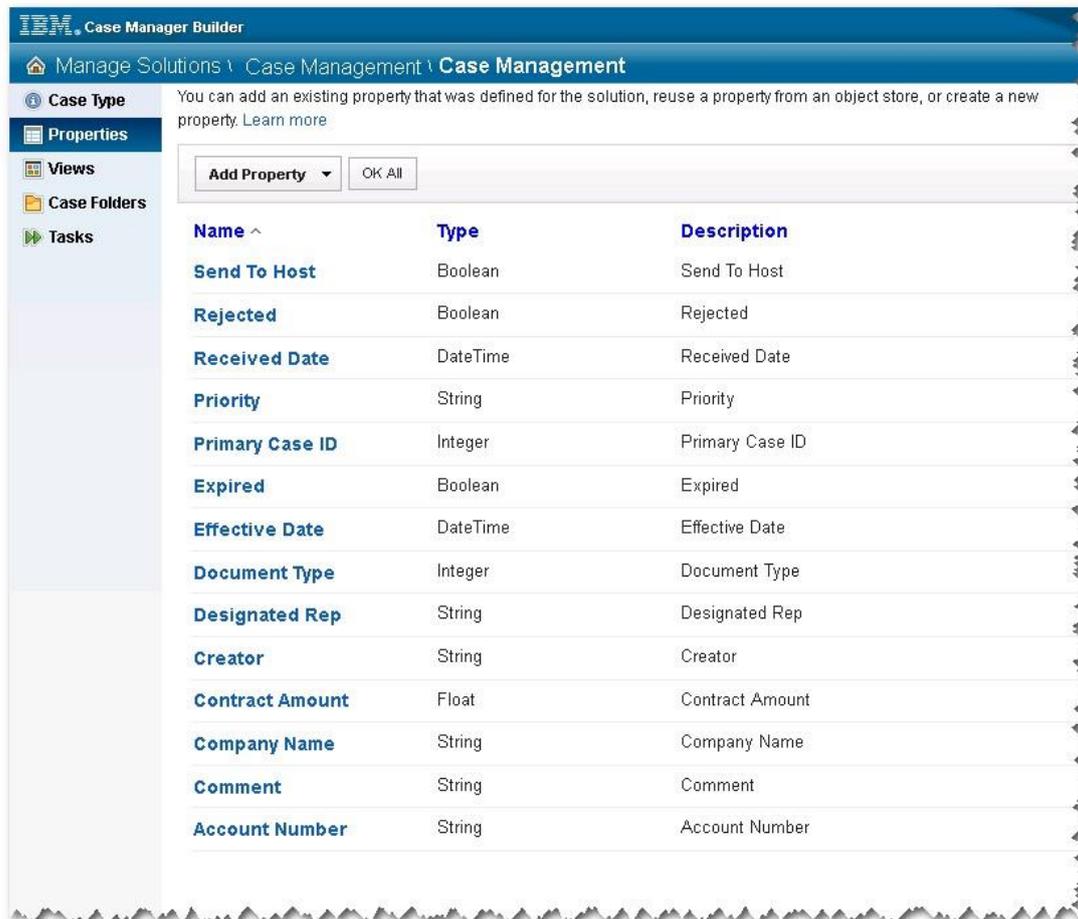
Role	Case Details page layout
Approver	Default Case Details page
Indexer	Default Case Details page
Reviewer	Default Case Details page
Supervisor	Default Case Details page

5.4.3.2 Configure Case Type Properties

Next you will define the properties for the Case Type.

1. Click Properties on the left side panel of the screen.
2. Click the Add Property button and select Existing.
3. Select the entire Case type Properties list in above table.

4. Click OK.
5. Click "OK All".



The screenshot shows the IBM Case Manager Builder interface. The breadcrumb navigation is 'Manage Solutions \ Case Management \ Case Management'. The left sidebar contains 'Case Type', 'Properties', 'Views', 'Case Folders', and 'Tasks'. The main area displays a table of properties with columns for Name, Type, and Description. At the top of the main area, there is an 'Add Property' dropdown and an 'OK All' button.

Name ^	Type	Description
Send To Host	Boolean	Send To Host
Rejected	Boolean	Rejected
Received Date	DateTime	Received Date
Priority	String	Priority
Primary Case ID	Integer	Primary Case ID
Expired	Boolean	Expired
Effective Date	DateTime	Effective Date
Document Type	Integer	Document Type
Designated Rep	String	Designated Rep
Creator	String	Creator
Contract Amount	Float	Contract Amount
Company Name	String	Company Name
Comment	String	Comment
Account Number	String	Account Number

5.4.3.3 Configure Case Views

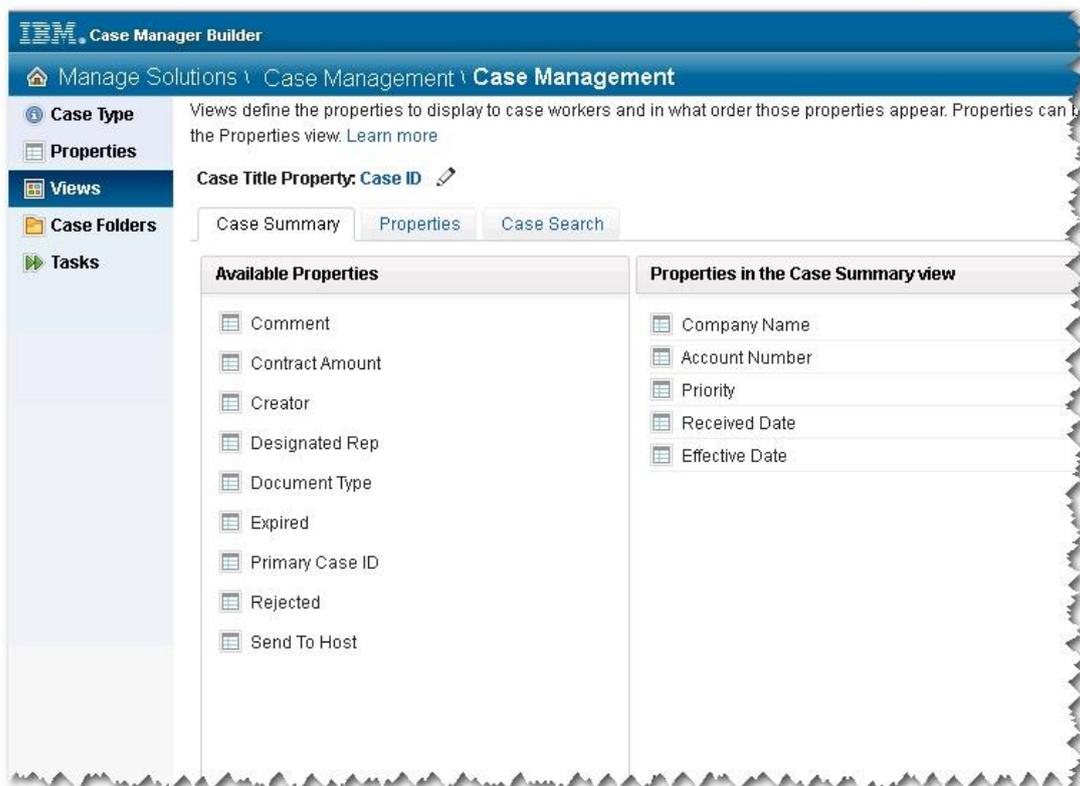
The Case Manager Client provides three views to caseworkers to 360° view of the case. They are:

- Case Summary View: Provides a summary level view of key properties of the case.
- Case Detail View: Provides the detail view of the properties of the case. Within this view, properties can be grouped and hidden to help manage the presentation in the event there are a lot of properties.
- Case Search View: Caseworkers can use this widget to search for cases based on the criteria provided by the Business Analysts.

5.4.3.3.1 Configure the Case Summary View

Follow the steps to configure Case Summary View.

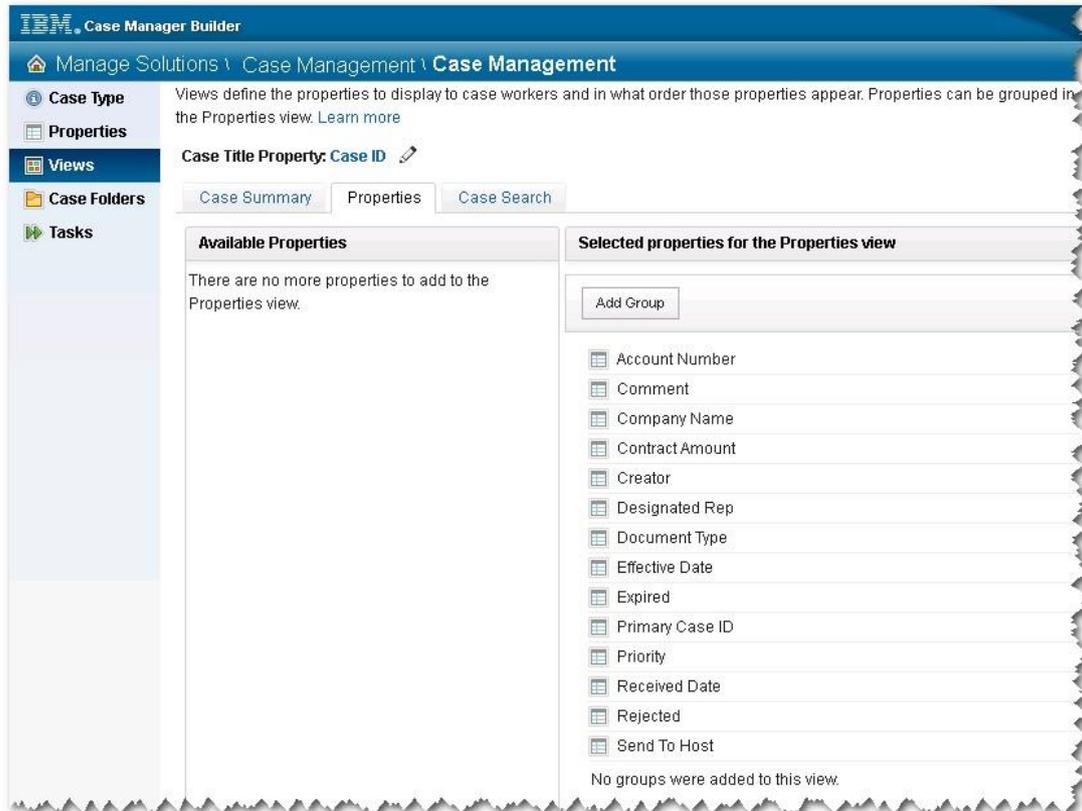
1. Click Views tab
2. Select Case Summary tab
3. Select the properties listed in the above table for Case Summary View. In the case definition table from the Available Properties section on the left side and move them to the Properties in the Case Summary view section in the right side by either double clicking on them or using the arrow icon that appears when you hover over them.



5.4.3.3.2 Configure Case Properties View

Follow the steps to configure Case Properties View

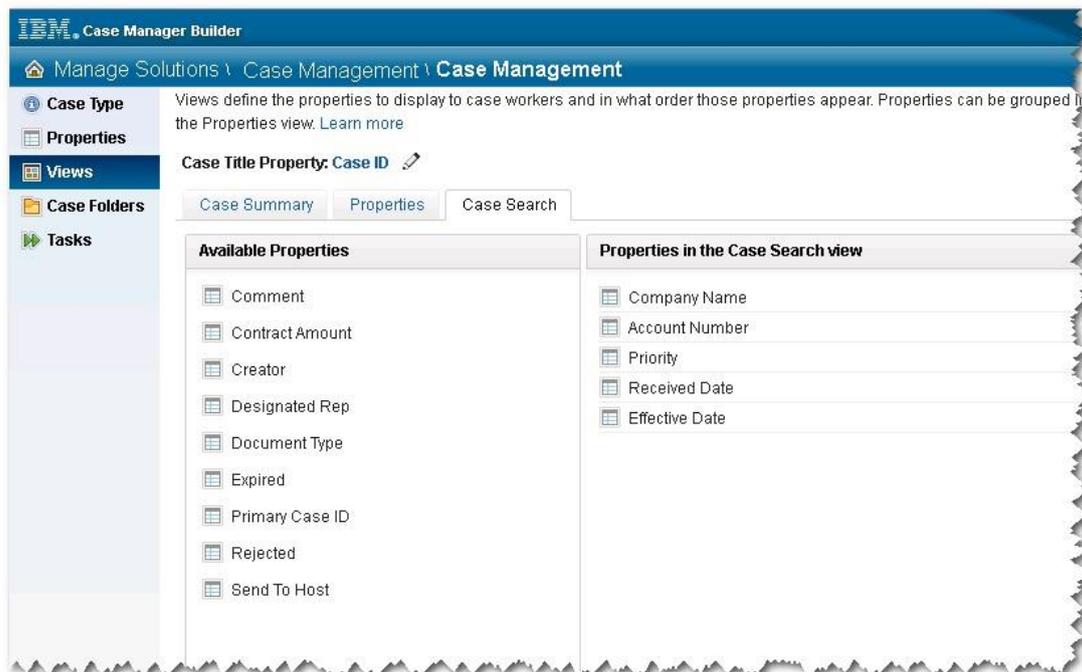
1. Select the Properties tab.
2. Select all the properties from the Available Properties section on the left side and move them to the Properties in the Properties view section in the right side.



5.4.3.3 Configure the Case Search View

Follow the steps to configure Case Search View

1. Select Case Search tab.
2. Select the properties listed in above Case Type Definition table from the Available Properties section on the left side and move them to the Properties in the Case Search view section on the right side.



5.4.3.3.4 Configure the Folder structure for the Case Type

You can define the default case folder structure here and the new created case instances will take the case folder structure by default.

5.4.3.3.5 Create and configure Case Tasks

You can define the Case Tasks to the Case Type here. ICM provide rich Case Task model to satisfy business process requirements. You can refer the ICM information center for more details about how to design Case Tasks.

For the BPF example application, you can define the task by reusing BPF workflow in later chapter.

5.4.3.4 Deploy ICM solution

Go back to the main solution page in Case Builder and click the Deploy menu of the target ICM solution, Case Management.



5.5 Transition BPF Workflow to ICM Solution Task

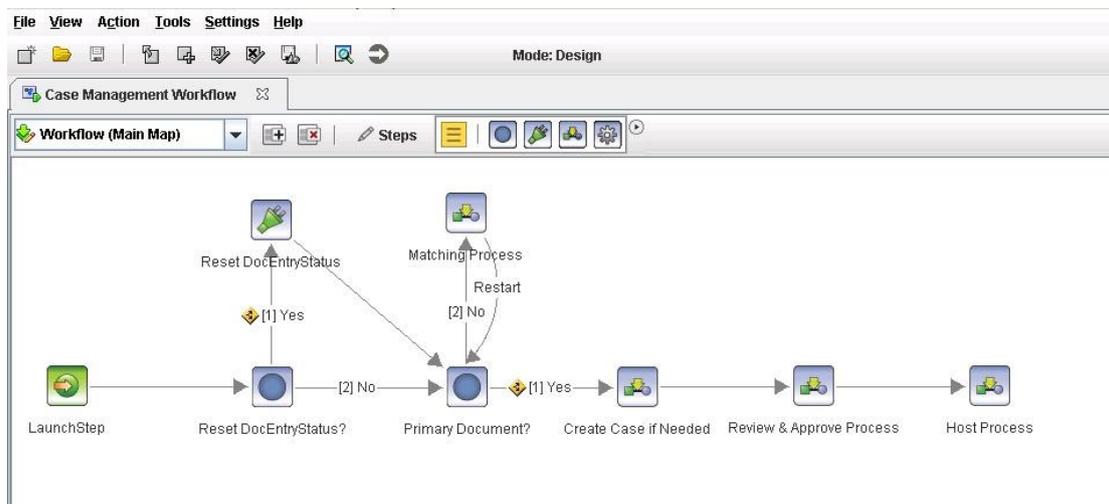
In this chapter, the steps about how to transition the BPF workflow to ICM task are provided. The BPF application, Case Management, is still taken as an example to explain how to perform the steps.

Generally speaking there are two ways to transition BPF workflow to ICM solution. 1) Manually redefine the workflow into task in ICM solution. 2) Export BPF workflow and import it to ICM and reuse BPF workflow. The first approach is more natural to ICM, and users can benefit the full functionalities associated to ICM native task, but the redesign will take a little more effort than the second. User can reuse the BPF workflow in the second approach, and that saves some workflow design effort but lack some of the functionalities associated to ICM native task. For the first approach, please refer ICM Info Center to learn how to design ICM task. The following sections of the chapter address the procedures of the second approach.

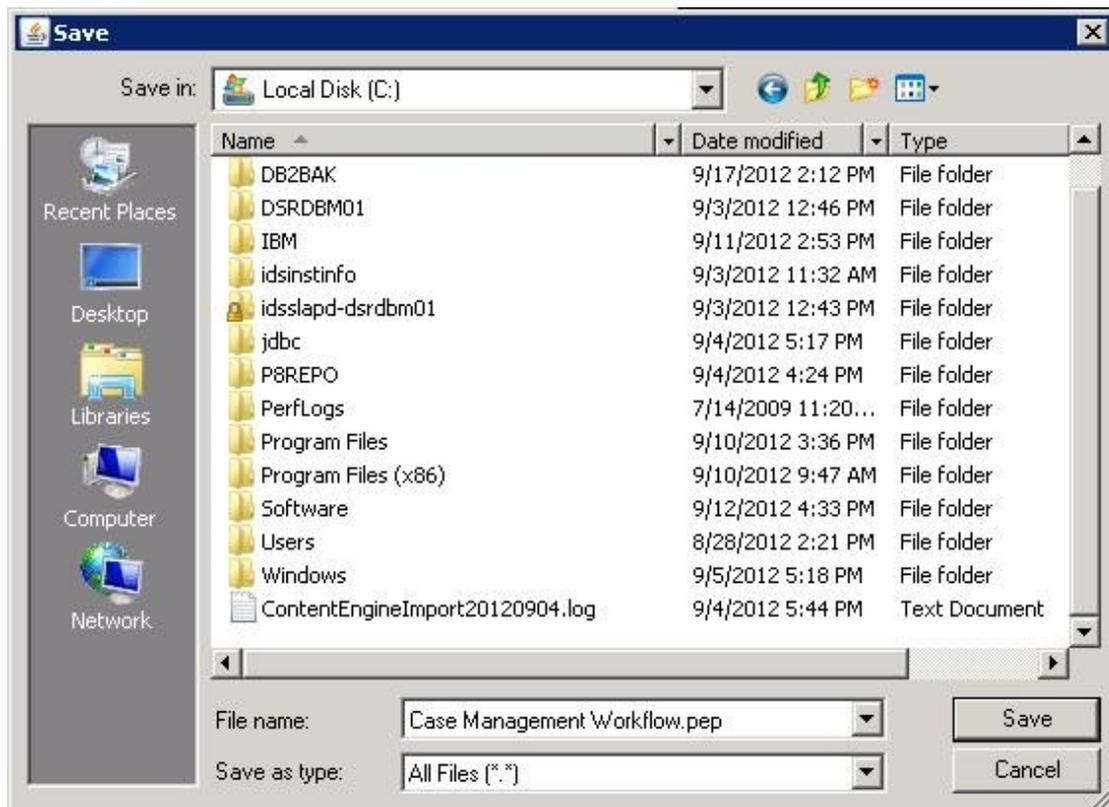
5.5.1 Export BPF workflow

User can export BPF workflow to local system.

1. Log into Workplace and open the BPF workflow



2. Select File > Save as ... to save the workflow to local

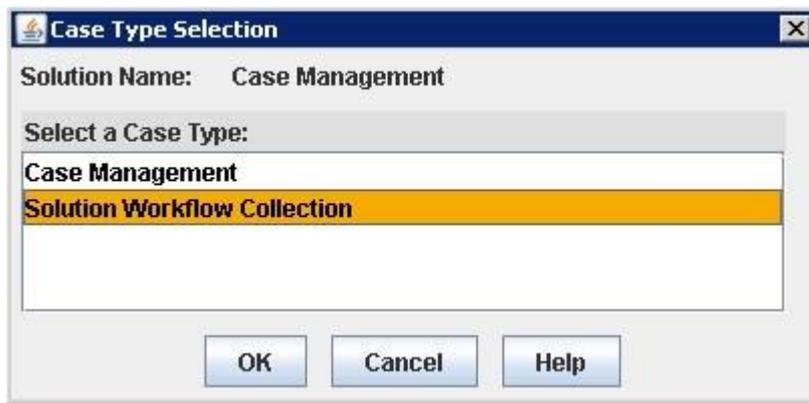


5.5.2 Import the Workflow to ICM Solution

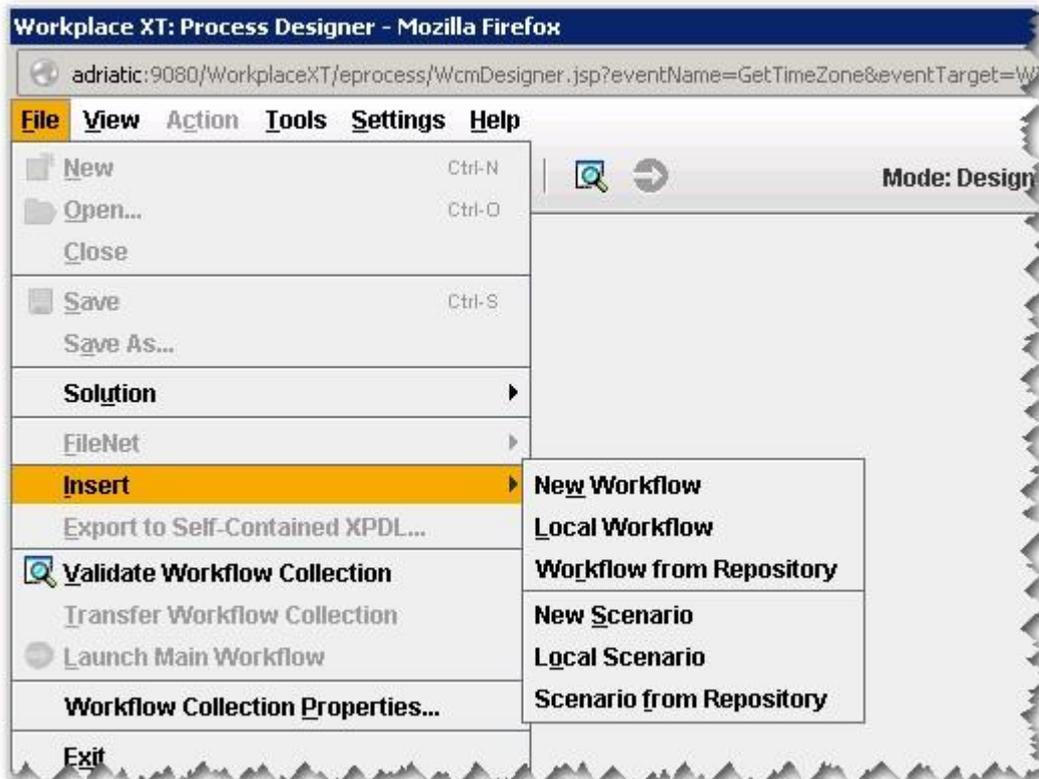
1. Firstly you need edit ICM Solution workflow from Process Designer. You can open Process Designer from More Actions drop down menus of the solution in Case Builder.



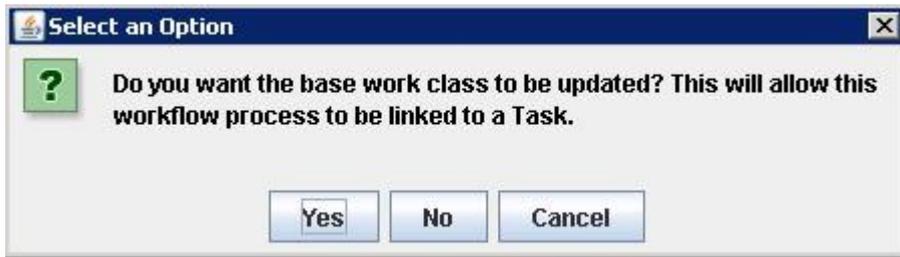
2. Select Solution Workflow Collection at the Case Type Selection dialog



3. Then select File > Insert > Local Workflow in Process Designer, and select the BPF workflow exported in last chapter.



4. Select Yes at the popping up option dialog.

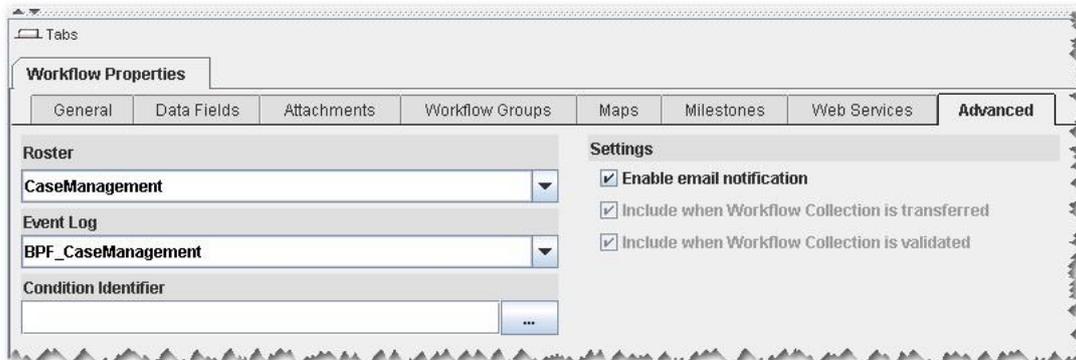


- Change the queue of the Workflow Step to new queue in Process Designer. If you want to use the same queue as BPF side, you need create BPF work queues in the PE region. For “Case management”, user need do below changes.

Table 5-53 Work Queues in ICM solution

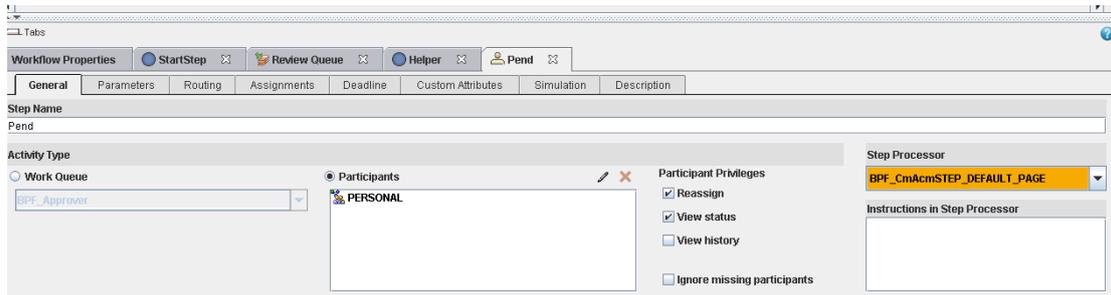
Workflow Steps	New Queue name in ICM solution
Indexing Queue	BPF_Indexer
Review Queue	BPF_Reviewer
Matching Queue	BPF_Indexer

- Open workflow properties, and delete the BPF specific properties, such as BP8CaseID, BP8CaseType, etc.
- Update the Roster and Event Log to the ICM Solution's Roster and Event Log.



- Delete the steps that use BPF_Operation.
- Delete the BP8Case from the attachments.
- Delete the workflow groups from the steps that are not needed.
- Add the property that defined in Case filed but not on workflow.
- Modify the property name to the mapped Case property name. For example, if there is property named “CompanyName” in workflow, and the mapped property on ICM Case is “TM_ CompanyName”(note the ‘TM’ here is the solution prefix), and then user need to modify the “CompanyName” to “TM_ CompanyName” on the workflow. And then add these modified properties as new properties on the work queue.
- Update the step processor to ICM default step processor. (If user does not update the step processor, the case will not be opened, since ICM uses the step processor of XT, but BPF

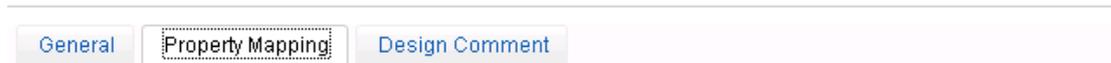
uses the step processor of AE).



14. Validate and save the workflow.

5.5.3 Create ICM task to reuse the BPF workflow

1. Log in Case Builder.
2. Navigate to Case Types tab. Then select the Case type and go to tasks, select add task from BPM Workflow.
3. Input task name and select the workflow imported at last step.
4. Map all the workflow data fields to Case type properties by field name.



Map process data fields to solution properties.

Click the "+" button to save the data field to property mapping.

Process data field name: Case type property name:

Property map:

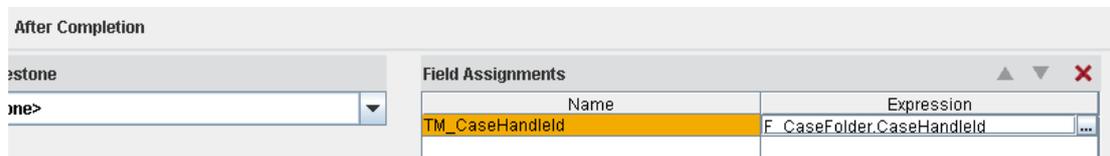
```

AccountNumber = AccountNumber
CompanyName = CompanyName
ContractAmount = ContractAmount
CreateCase = CreateCase
DocumentType = DocumentType
EffectiveDate = EffectiveDate
    
```

5. Save and close the solution.

5.5.4 Map Workflow data to Case data

1. Open Process Designer from More Actions drop down menus of the solution in Case Builder. Then select File > Solution > Edit ... in Process Designer.
2. Select the solution definition file, and then select the CaseType created at last step.
3. Select to Override Inherited Map.
4. Inherit all the sub maps and workflow. User must inherit the map in order to edit it here; otherwise the workflow will be in read-only mode.
5. Go to each workflow step, and map workflow parameter to case data. For example, a workflow field named "TM_CaseHandleId", and it is mapped to case property CaseHandleId, you can input the expression to map it to case data like this, F_CaseFolder_CaseHandleId.



6. Save and close the solution.

5.5.5 Create additional in-baskets

There are several In-baskets that are not created when user create the ICM solution. Then you have to create those additional in-baskets in Process Designer. Refer to the chapter 'Map BPF In-baskets to ICM Role/Personal In-basket' for the additional in-baskets.

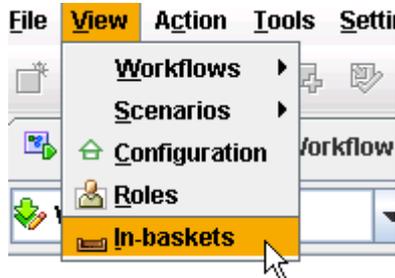
For the BPF example application, Case Management, follow the below table to create additional in-baskets and assign them to right role.

Table 5-54 Additional ICM In-baskets Configuration

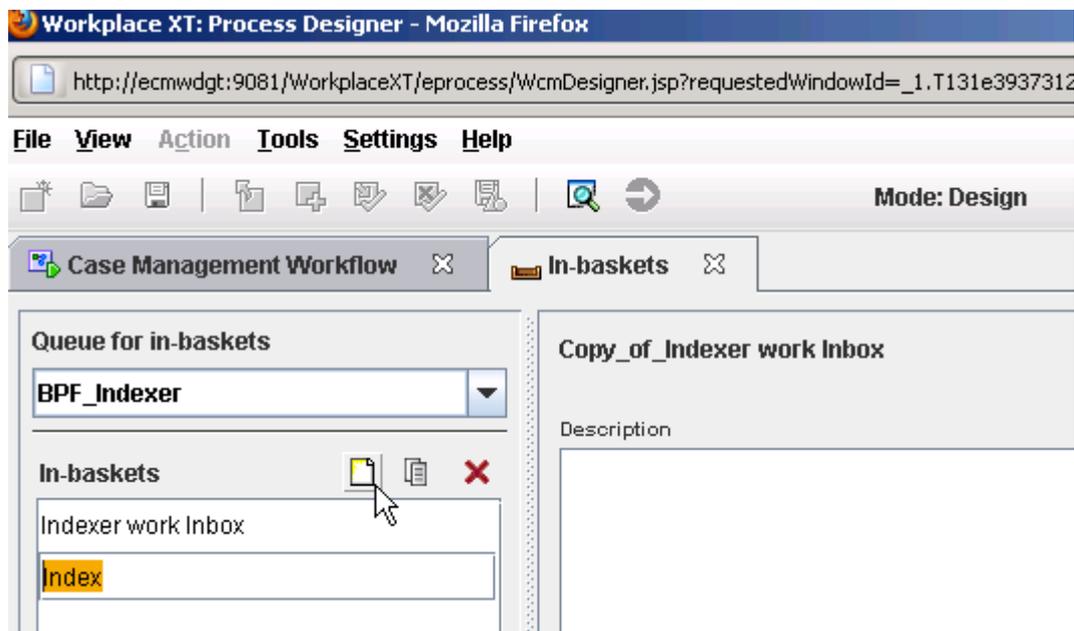
In-basket Name	In-basket Type	Role	Queue name	Queue Type	WF Steps	Create In
Matching	Role	Indexer	BPF_Indexer	Work Queue	Matching Queue	Process Designer
Index	Role	Supervisor	BPF_Indexer	Work Queue	Indexing Queue	Process Designer
Matching	Role	Supervisor	BPF_Indexer	Work Queue	Matching Queue	Process Designer
Review	Role	Supervisor	BPF_Reviewer	Work Queue	Review Queue	Process Designer

Follow below steps to add the additional in-baskets.

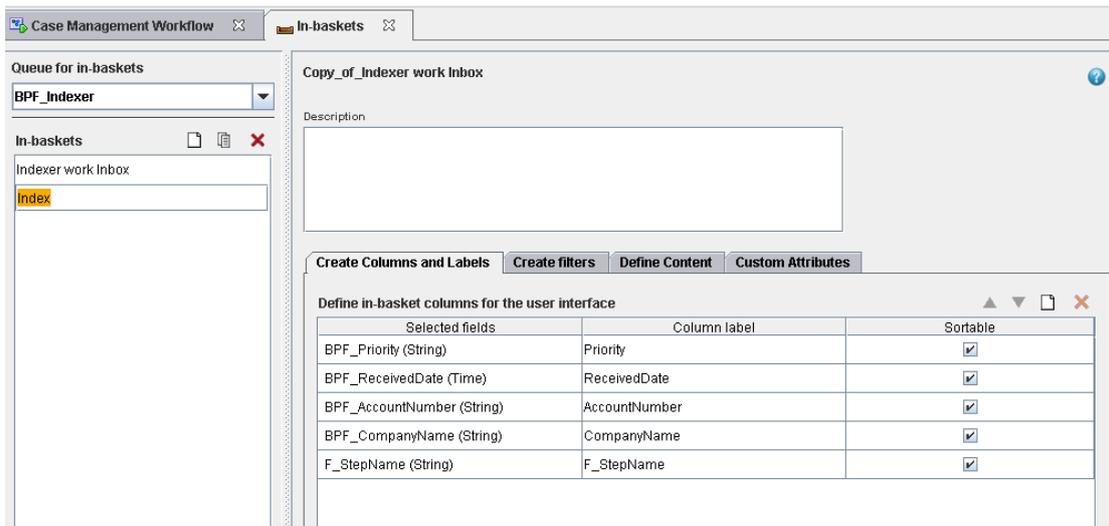
1. Open the solution in Process Designer.
2. Click the View on the toolbar, and then select In-baskets.



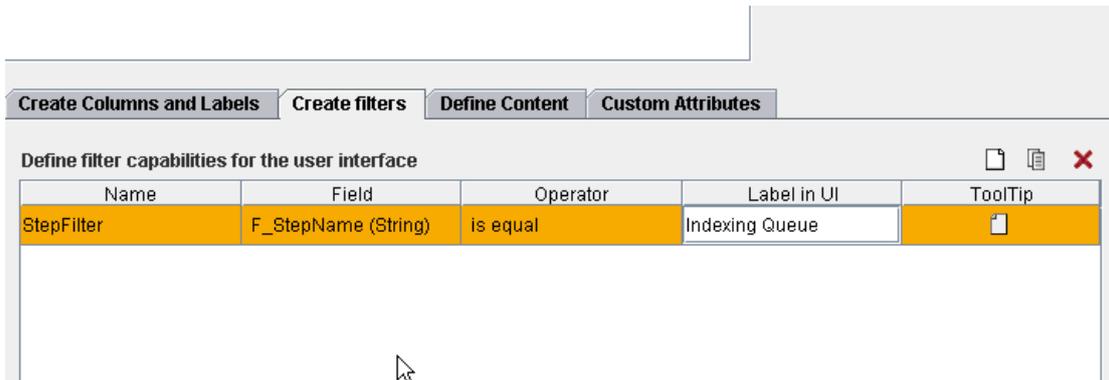
3. Select the queue to create in-baskets, and then click new and input the In-basket name.



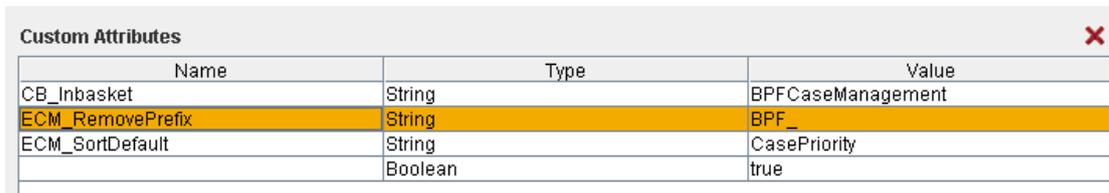
4. Create the Columns. Select and add the case fields from workflow.



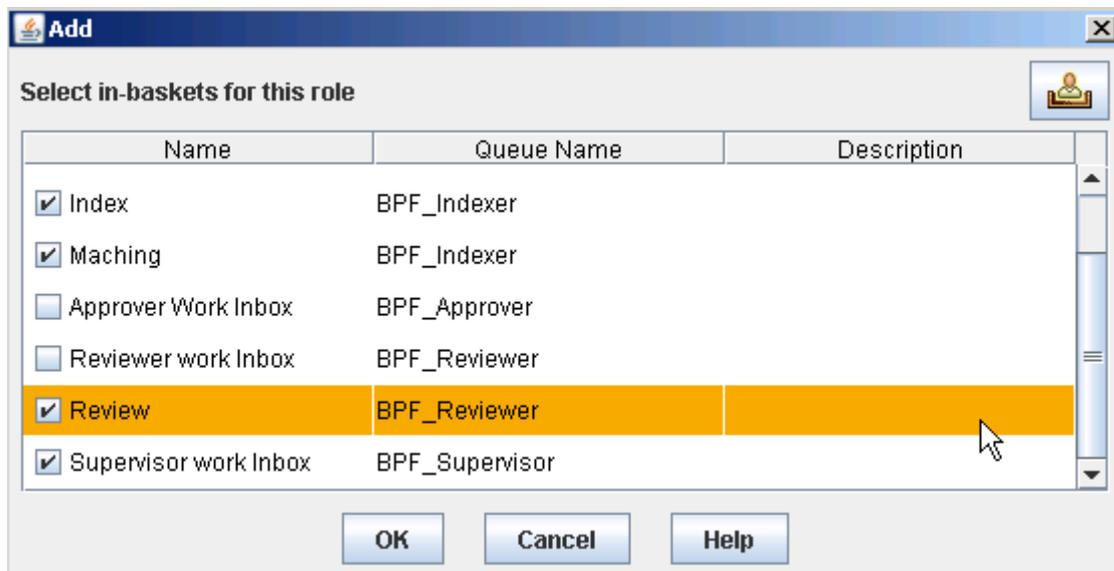
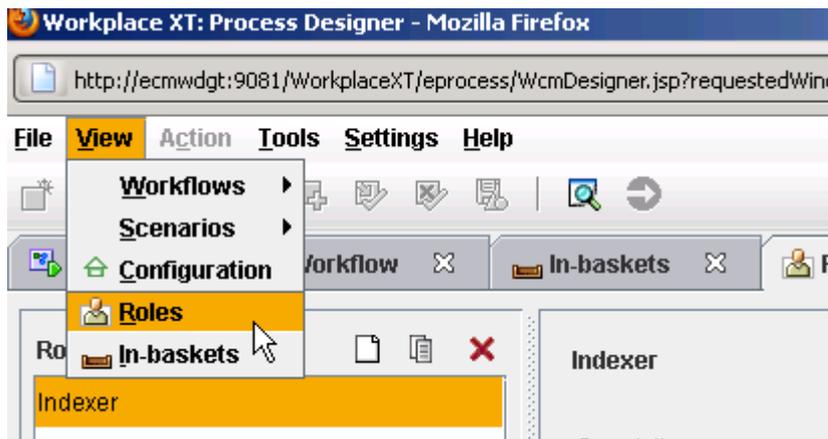
5. Create the filters.



- Define content, add the “F_stepName = ‘<step name of the in-basket>’”. If the queue is inbox, need to add “SolutionIdentifier=‘<solution name>’”.
- Add customer attribute, only ECM_SortDefault is mandatory, which is used to point out the default sort.



8. Open the roles, assign the in-basket to the roles.



9. Click the toolbar to validate Workflow Collection, and ensure no error.
10. Save and close the solution.
11. Go to Case Builder to deploy the solution.

5.6 Transition eForms Template

Take below steps to transit the eForms template from BPF to ICM.

1. Find the eForms Template that is used in BPF.
2. Add the eForms Template to WorkplaceXT by using the document class "ITX Form Template".

- Filename: Case.itx
- Location: ATOS :: Eform
- Class: ITX Form Template
- Major version

Properties

Document Title:

CmFederatedLockStatus:

Form Description:

- Open the solution by process designer. Then open the workflow. Add the eForms Template file to the workflow as workflow Attachment. You can also use Case Form Widget to populate case data, and you can refer the ICM information center to get the detail steps to configure Case Form Widget.

Workflow Properties LaunchStep Review & Approve P...

General | Data Fields | **Attachments** | Workflow Groups | Maps | Milestones | Web Services | Advanced

Attachments				
	Name	Array	Value	Description
	InitiatingAttachment	<input type="checkbox"/>		this field is required to capture initiating a...
	Eform	<input checked="" type="checkbox"/>	Case.itx	

- Register Work Detail Form Page to solution.
 - Set the Work Detail Form Page as default Step page.
- User can reference "Using IBM Forms with Case Manager.doc" for detail.

About the authors

Tao Liu is a staff software engineer of IBM Case Manager Product, and joined Enterprise Content Management team of IBM in 2011. He has more than 3 years of software development experience and solid knowledge about FileNet product. He can be reached at ttaoliu@cn.ibm.com

Gai Li is a staff software engineer for IBM Case manager product, and joined Enterprise Content Management team of IBM in 2009. She has 5 years of software developing experience and more than 3 years of web2.0 developing experience. She can be reached at ligai@cn.ibm.com

Dan Liu (Ellen) is team lead of FileNet Business Process Framework product and FileNet eForms product, and joined Enterprise Content Management team of IBM in 2008 and has more than 6 years of software testing and 5 years of project management experience. She can be reached at liudanbj@cn.ibm.com

Xiao Jian Lian is a staff software engineer who has been working with Enterprise Case Manager eClient, portlet and FileNet Business Process Framework product. He has more than 6 years' software development and test experience and deep knowledge of IBM ECM and FileNet product. He can be reached at lianxj@cn.ibm.com

He Sheng Yang (Harris) is an Enterprise Content Management QA manager and responsible for many FileNet products, such as IBM Case Manager, Business Process Framework, FileNet eForms, FileNet Business Process Management. Harris joined IBM in 2004 and has more than 9 years working experience in software development area including development, quality assurance, project management and people management. He ever worked on IBM Records Manager and passed DoD Certification for that product and got Outstanding Technical Achievement Award in IBM. Harris received his MS in Computer Science from Beijing Institute of Technology in 2003. He can be reached at yanghes@cn.ibm.com

Stella Zhang is release manager of FileNet products including Business Process Framework, FileNet Capture and FileNet ECM Widgets. She joined Enterprise Content Management team of IBM in 2007 and has more than 10 years of software testing and 5 years of project management experience in Business Process Management, Geographic Information System and Remedy Quality Management. She can be reached at zhangst@cn.ibm.com

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