IBM Case Manager Mobile
Version 1.0.0.8

Users' Guide



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This edition applies to version 1.0.0.8 of IBM Case Manager Mobile (product number 5725-W63) and to all subsequent releases and modifications until otherwise indicated in new editions.

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IBM Case Manager Mobile: User Guide

Welcome

Welcome to the IBM Case Manager Mobile documentation, where you can find information about how to install, administer, and use IBM Case Manager Mobile.

Versions

1.0.0.8

Overview

IBM Case Manager Mobile is a mobile app that enables you to access and complete your work when away from your office or desk.

IBM Case Manager Mobile is compatible with the Apple iOS platform on both iPhone and iPad and with the Google Android platform on Android smartphone devices.

Before deploying IBM Case Manager Mobile in production, you must have a licensed version of IBM Case Manager.

You must also install the IBM Case Manager Mobile Configurator plug-in for IBM Content Navigator on your production system.

This plug-in enables administrators to customize theming and branding; and customize app behavior without writing code. These features are discussed further in "Administrators."

Document Prerequisites

This document assumes the reader has a working knowledge of IBM Case Manager and its associated case management concepts. For more information, see IBM Case Manager V5.2.1 documentation.

App Users

A case worker who uses the app on a mobile device is considered an app user.

Getting Started

Installation Prerequisites

To install and use IBM Case Manager Mobile you must have the following server components preinstalled:

- IBM Content Navigator V2.0.3 or later
- IBM Case Manager V5.2.1 or later

You must be using one of the following devices:

- An iPhone or iPad with iOS 10.0.0 or later
- An Android smartphone with Android 5.1 or later

Installing IBM Case Manager Mobile Configurator

The IBM Case Manager Mobile Configurator is an IBM Content Navigator plug-in that you must install before using the IBM Case Manager Mobile app. This plug-in provides the following functions:

- Efficient web services to which the IBM Case Manager Mobile app can connect
- Configuration of behavior for the IBM Case Manager Mobile app
- Configuration of Mobile Device Management for the IBM Case Manager Mobile app

To install IBM Case Manager Mobile Configurator:

1. Download the plug-in from Fix Central.
2. Install the plug-in from the IBM Content Navigator administration panel.

Installing IBM Case Manager Mobile app

Install the IBM Case Manager Mobile app from one of the following sources:

1. The iTunes App Store or Google Play Store
2. The Apple Volume Purchase Program
3. An Enterprise App Store such as the MaaS360 Enterprise App Catalog

App overview

Logging in

In order to login to IBM Case Manager Mobile, enter your IBM Content Navigator URL, username, and password.

Alternatively, tap the "Use Demo" icon to automatically load a demo case.

If you experience trouble logging into the application, contact your administrator or support team.

Navigation

The IBM Case Manager Mobile has two different forms of navigation

- Smartphone
- Tablet

Smartphone

The Smartphone navigation allows you to navigate between solutions by swiping left or right. The "page control" dots at the top of the screen indicate the number of solutions and the index of the current solution.

The initial view of the solution shows a photograph indicating landmarks that are geographically close to your location. The view also indicates the number of open tasks in your first role in-basket.

You can then scroll to view:

- An outbox that shows tasks that you have updated and are pending upload (iOS only)
- Personal in-baskets
- Role-based in-baskets
- A map showing nearby tasks

Tablet

The tablet navigation comprises a "split" view with a "master" navigation on the left and a "detail" view on the right.

The "master" view allows navigation to the following screens:

- A dashboard showing the number of open tasks in your role in-baskets
- A map showing nearby tasks
- An outbox that shows the tasks that you have updated and are pending upload
- Personal in-baskets
- Role-based in-baskets

Feature overview

How-to guide

The following section explains how you can use the IBM Case Manager Mobile to complete common tasks.

Listing tasks in an in-basket

Opening a personal or role in-basket shows the tasks belonging to that in-basket. To refresh the list, scroll to the top and then pull down the list. This action is known as "pull-down-to-refresh".

Executing tasks

You can use IBM Case Manager Mobile to perform the following tasks:

- Update task properties
- Execute task workflow responses
- Lock and unlock tasks

- Move tasks to inbox
- Reassign tasks
- Download documents per case
- Upload, copy, and paste documents when offline
- Add cases when offline

To execute one of these actions for a task:

1. Choose a task from any in-basket.
2. On the task screen, choose the action to perform.

You can also perform a sideways swipe on the task in an in-basket to get a list of quick actions.

Viewing case information on the case screen

To view case information:

1. Navigate to a task.
2. Tap the "case" icon.

From the case screen, you can view:

- Case tasks
- Case comments
- Case documents
- Case history

Adding a new case

To add a new case:

1. Navigate to the solutions screen.
2. Select the "Add Case" option.
3. Select the right "Case type" and complete form.
4. Tap the "Add Case" button at the bottom. (This feature is also available offline)

Adding a case comment

To add a comment to a case:

1. Navigate to the case screen.
2. Select the "Comments" option.

3. Tap the "Add" button and type your comment.
4. Tap the "Done" button.

Subscribe to receive notifications

To receive notifications for a particular case comment:

1. Navigate to the case screen.
2. Select the "Comments" option.
3. Tap the "Alert" icon.
4. Notifications will be received when the app is in the background.

Uploading a photo or document to a case

To upload photos or documents:

1. Navigate to case screen.
2. Select the "Documents" option.
3. Tap the "Add" button and then select the option to either "Take a Photo" or "Upload from Camera Roll".
4. Select document to be uploaded.
5. Edit or rename title of document to be uploaded.

Viewing document properties

To view document properties:

1. Navigate to case screen.
2. Select the "Documents" option.
3. Navigate to the document you would like to open.
4. Tap the "(i)" button in the top right of the screen.

Creating discretionary tasks

To create a discretionary task:

1. Navigate to the case screen.
2. Select the "Tasks" option.
3. Tap the "Add" button to create a new discretionary task.

Locating nearby tasks

To locate tasks in geographic proximity, navigate to the 'Nearby tasks' option. For more information, see "Navigation."

Tasks are plotted on the map by using the "lat" (Latitude) and "lon" (Longitude) properties of a case. You can set these properties by using the IBM Case Manager desktop client.

To navigate to the task screen for a nearby task, tap the pin for that task. You can locate the task on a three dimensional map by tapping on the "3D" option on the navigation bar.

Working offline

Offline working is not supported on Android devices in IBM Case Manager Mobile V1.0.0.2

On Apple devices, you can use IBM Case Manager Mobile when offline to execute or update tasks that you have previously downloaded.

To work offline:

1. Navigate to a task.
2. Disable internet connectivity on your device (for example, by activating Airplane mode).
3. While offline it is possible to:

- Complete the task
- Update case properties and save changes
- Move to inbox
- Reassign a case to another user
- Add a new task
- Upload documents offline (for example, from camera roll or other mobile applications)
- Paste HTML from clipboard into a case
- Save tasks, cases or documents

The app notifies you that your task will remain in your Outbox until you come back online

Enable internet connectivity on your device. The app uploads your task from your Outbox.

Administrators

Administrators can change behavior in the IBM Case Manager Mobile app by using the IBM Case Manager Mobile Configurator, Case Manager Builder, or Process Designer.

IBM Case Manager Mobile supports all of the functionality available in Case Manager Builder, except for JavaScript custom widgets.

To access IBM Case Manager Mobile Configurator:

1. Navigate to the IBM Case Manager administrative panel on your desktop computer.
2. Navigate to the plugins section.
3. Click the IBM Case Manager Mobile plug-in.

Mobile Property Layouts

You can create custom property layouts for IBM Case Manager Mobile. To create a custom layout:

1. Create a property layout with IBM Case Manager Builder.
2. Name the property layout according to the following convention:

- Tasks `<Step Name>Mobile`, for example `InvoiceApprovalMobile`
- Adding Cases `Add<Case Type Name>Mobile` for example `AddNewAccountRequestMobile`
- Searching for Cases `Search<Case Type Name>Mobile` for example `SearchNewAccountRequestMobile`
- Case properties `Case<Case Type Name>Mobile` for example `CaseNewAccountRequestMobile`

Currently only single column layouts are supported.

Mobile task responses

In the IBM Case Manager Mobile Configurator you can specify which task responses should be available in the mobile App.

Navigate to the plugin page and specify in the Mobile Task Responses filed the list of supported responses in the format `<Solution Prefix>_<Step Name>_<Response>` for example `CRE_InvoiceApproval_Approve, CRE_InvoiceApproval_Reject`.

Then click on Save.

The items in the list are case and whitespace insensitive. For any tasks listed, only the responses you enter will be shown. If you do not list a task, all responses will be shown for that step.

Changing branding/theming

To change the branding and theming

1. Change the logo URL in order to specify a new in-app logo. For example you can use the IBM logo: http://bit.ly/1KV9MJd
2. Change the main branding color of the app.
3. Click Save.

To view these changes, log out of and log back in to any running instances of the app.

A service that provides localised images can be found at this address : http://bit.ly/1FkwH0D

Using web pages for dashboard and add case

You can use a web page to replace the dashboard in the role selection screen. To do so, enter the IBM Case Manager Mobile Configurator and enter the URL of the desired web page in the **Use web url for Dashboard** field.

You can also use a web page to add a new case instead of using the native screen. To do so, enter the IBM Case Manager Mobile Configurator and enter the URL of the desired web page in the **Use web url for Add a new case**.

FAQs

What can I do if I cannot log in to the app?

If you cannot log in to IBM Case Manager Mobile, follow these steps:

1. Check internet connectivity on your device by using the browser to navigate to a well-known site (for example http://www.ibm.com).
2. Ensure that you can reach your IBM Case Manager server by using the browser on your device.
3. Ensure you have entered correct credentials.

If you still cannot log in to the app, contact your system administrator.

What decides which cases I can access?

You can access a case if you are a member of a role to which a task for that case is assigned. The tasks that are assigned to a role are listed in the role-based in-basket.

Tasks can be viewed in in-baskets. Cases can be navigated to from tasks.

What happens if my device is a shared device?

If your device is a shared device, log out of IBM Case Manager Mobile after you finish using the app.

Troubleshooting

For further support enquiries, contact your system administrator or IBM Global Support.

Links

IBM Case Manager documentation:
http://www.ibm.com/support/knowledgecenter/SSCTJ4_5.2.1/com.ibm.casemgmttoc.doc/casemanager_5.2.1.htm

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