

## Quick Start Guide

*This guide gets you started with a typical installation for IBM Case Manager*

### Product overview

IBM® Case Manager simplifies the job of designing and building a case management system and provides a client for case workers to easily manage cases. You design a case management solution that is based on closely related cases and then deploy that solution into a production environment. Case workers complete work items that are associated with cases.

### 1 Step 1: Access the software and documentation



If you download the product from Passport Advantage®, follow the instructions in the download document available at <http://www.ibm.com/support/docview.wss?uid=swg24043687>. This product offering includes the following software:

- IBM Case Manager
- IBM Case Foundation
- IBM Content Navigator, V3.0.1
- Watson™ Explorer Advanced Edition

For product documentation, see [http://www.ibm.com/support/knowledgecenter/SSCTJ4\\_5.3.1/com.ibm.casemgmtoc.doc/casemanager\\_5.3.1.htm](http://www.ibm.com/support/knowledgecenter/SSCTJ4_5.3.1/com.ibm.casemgmtoc.doc/casemanager_5.3.1.htm). Before you start the installation program, read the release notes at [http://www.ibm.com/support/knowledgecenter/SSCTJ4\\_5.3.1/com.ibm.casemgmtoc.doc/relnoteslanding.htm](http://www.ibm.com/support/knowledgecenter/SSCTJ4_5.3.1/com.ibm.casemgmtoc.doc/relnoteslanding.htm).

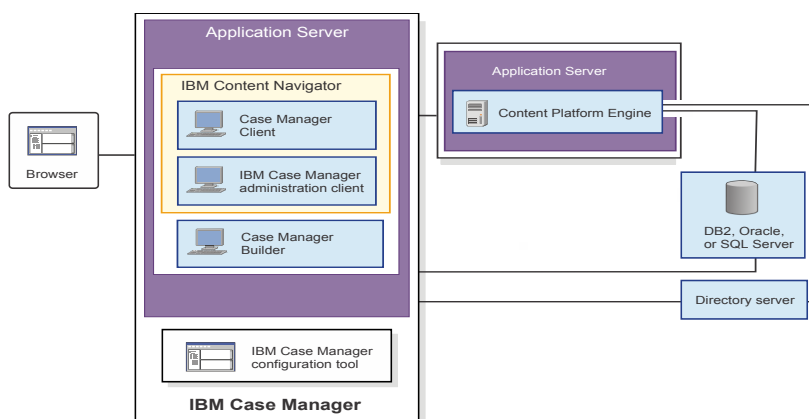
### 2 Step 2: Evaluate the hardware and system configuration



Use the Software Product Compatibility Reports page to generate a report for supported operating systems, related software, hypervisors, hardware requirements, and detailed system requirements, including component-level details. For more information, see System Requirements.

### 3 Step 3: Review the installation architecture

IBM Case Manager is deployed on a web application server (WebSphere® Application Server or Oracle WebLogic) and uses IBM Case Foundation or IBM Content Foundation to access and store content and assets. IBM Case Manager also requires IBM Content Navigator. The following graphic shows the typical architecture of IBM Case Manager in a distributed development environment and the features that IBM Case Manager can integrate with:



Content Search Services	IBM Case Analyzer Cognos Business Analytics	IBM Case Monitor Cognos Real-Time Monitoring
IBM Operational Decision Manager	IBM Forms	IBM Watson Content Analytics
IBM Content Manager	IBM FileNet P8 eForms	IBM Business Process Manager
	IBM Enterprise Records	

## 4 Step 4: Install or upgrade IBM Case Manager



You can install IBM Case Manager as a new installation or upgrade your Version 5.2.1 system or Version 5.3.0 system to Version 5.3.1. For instructions, see the following topics in the IBM Case Manager documentation:

- Installing and configuring in a cluster deployment or network deployment
- Installing and configuring on a stand-alone server
- Upgrading and configuring IBM Case Manager

## 5 Step 5: Get started



After you install IBM Case Manager, you run the configuration tool to deploy the Case Manager Builder and Case Manager Client applications on the web application server. Use Case Manager Builder in a development environment to create and modify your case management solutions. After you deploy your solutions in a production environment, case workers access the solutions through the Case Manager Client.

See the following topics for information about configuring an IBM Case Manager system:

- Configuring IBM Case Manager, for information about configuration in a cluster or network deployment
- Configuring IBM Case Manager, for information about configuration on a stand-alone server
- Upgrading and converting solutions

## More information



For more information, see the following resources:

- Adobe PDF versions of the documentation
- Product support
- IBM Enterprise Content Manager Communities

