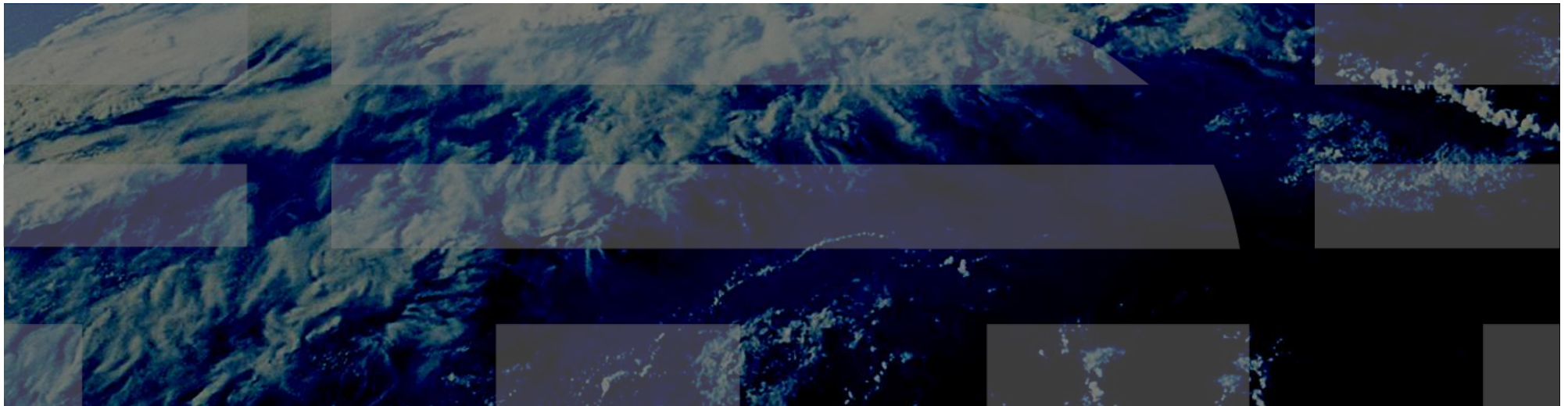

IBM Case Manager 5.2 Administration Overview and Best Practices Part 2

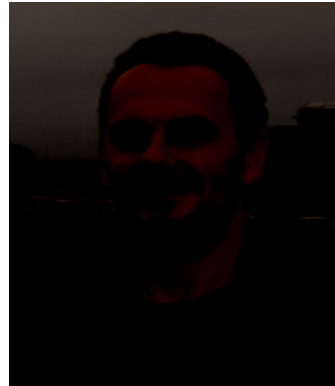


This session will be recorded and a replay will be available on IBM.COM sites and possibly social media sites such as YouTube. When speaking, do not state any confidential information, your name, company name or any information that you do not want shared publicly in the replay. By speaking during this presentation, you assume liability for your comments.

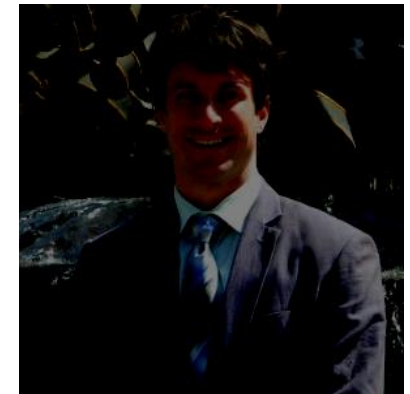
Welcome & Thank you for joining us!

Presenters

Tom Garda
Software Support
IBM Enterprise Content Management



William Kilpatrick
Software Support
IBM Enterprise Content Management



Brian Roots
With assistance from:
Case Manager Engineering Team
IBM Enterprise Content Management

Section 1: Agenda

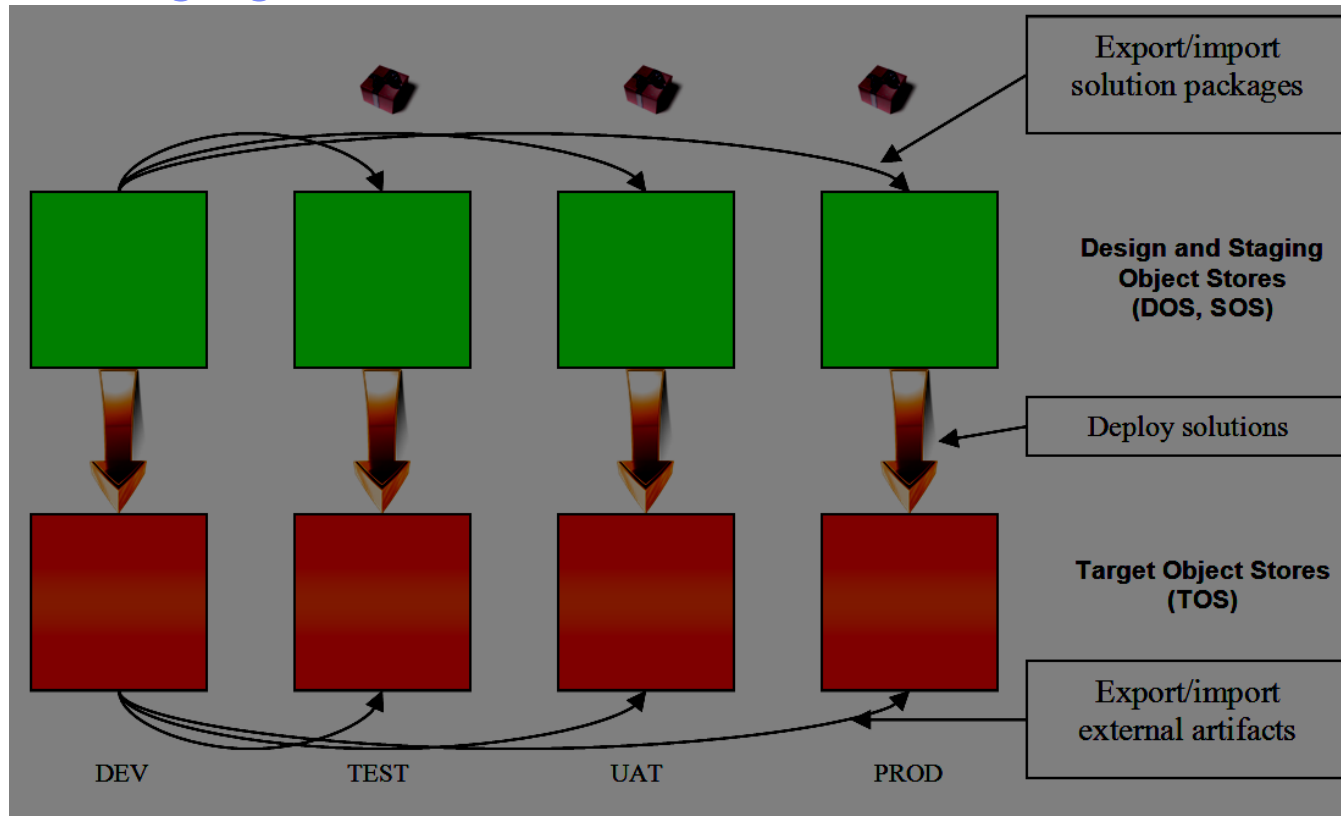
- Section 1: Agenda
- Section 2: Maintenance and Best Practices
 - Managing Solution Versions
 - Solution Security
 - Solution Deployment
 - Deleting Cases
- Section 3: Troubleshooting with IBM Support
- Summary
- Questions and Answers

Section 1: Maintenance and Best Practices

- **Managing Solution Versions**
- Solution Security
- Solution Deployment
- Deleting Cases

Section 2: Maintenance and Best Practices

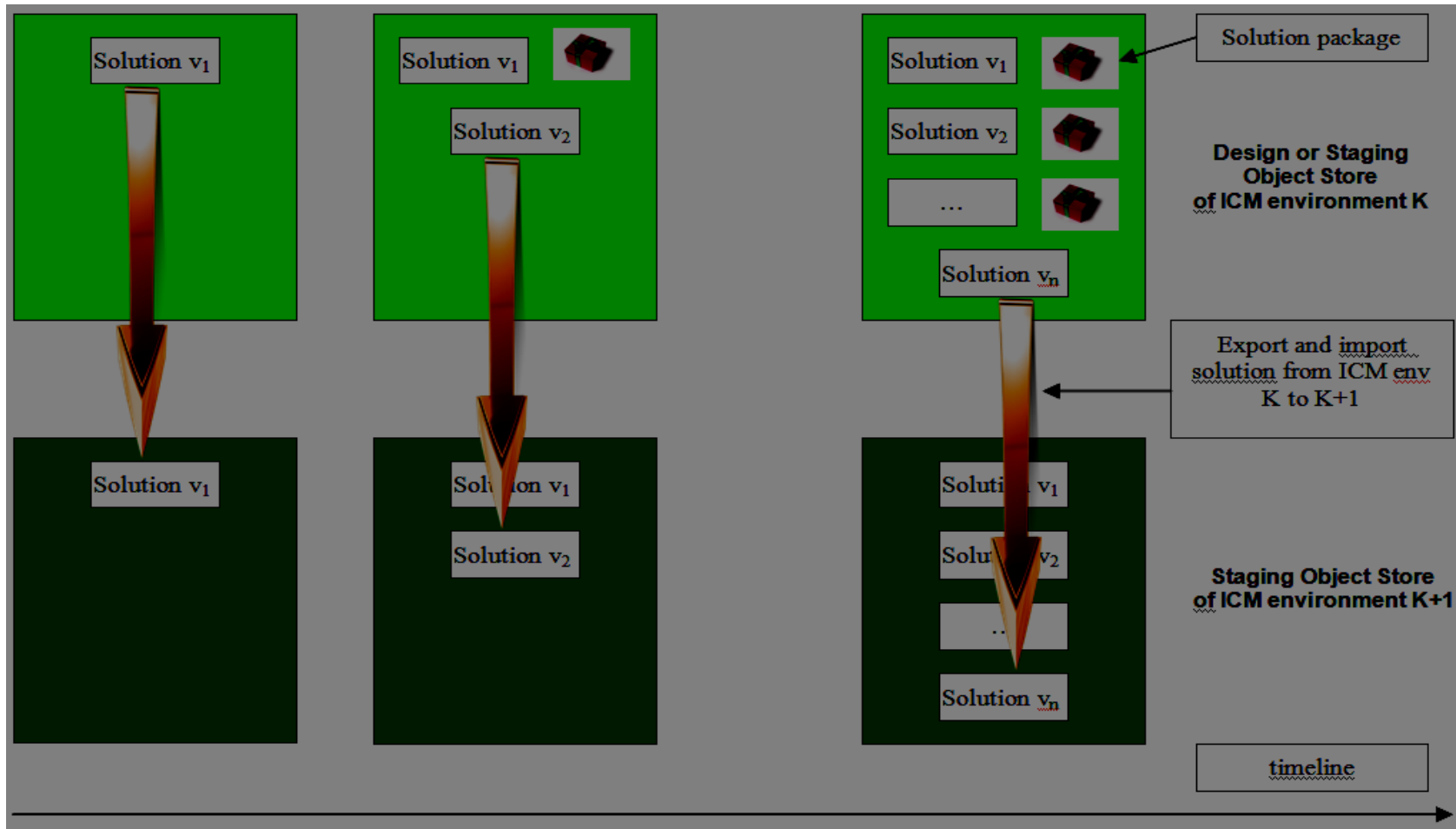
Managing Solution Versions



- **Best practice: edit the solution in the DEV environment only**
- DEV and TEST environments have ICM development profile
 - Issue: DEV and TEST environments are reset or reinitialized sometimes
 - Solutions can be deleted
 - Solution package imports can be deleted from DOS/SOS by using "Remove solution"
 - Solution deployments can be deleted from TOS by using "Reset Test Environment"
- **Best practice: dedicated Project Areas for critical solutions**
- UAT and PROD environments have ICM production profile
 - Solutions are never deleted

Section 2: Maintenance and Best Practices

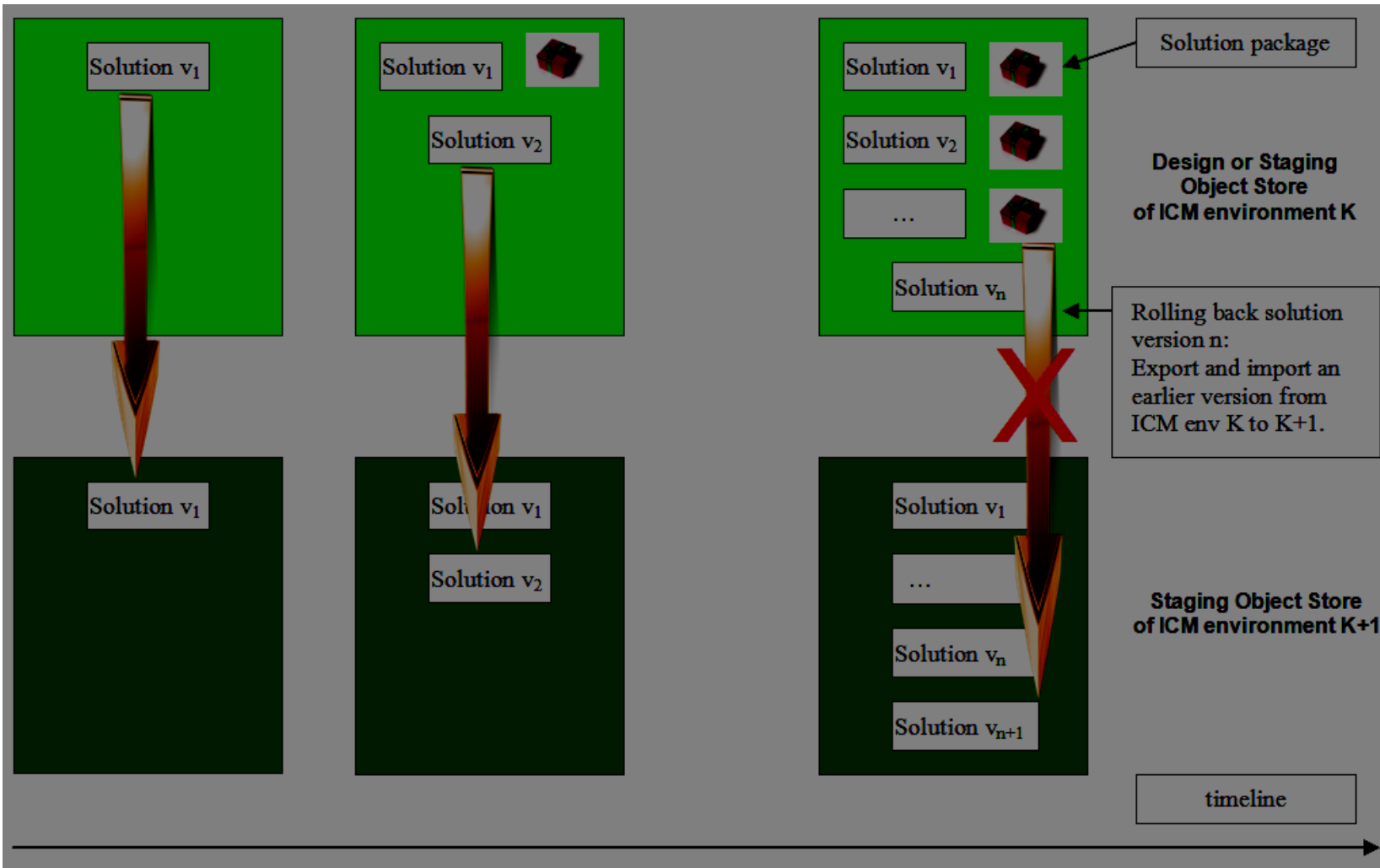
Managing Solution Versions – Roll back solutions to earlier versions



- Question: how to recover solution version n-1 or earlier?
- Rolling back solutions should be done in specific ways to prevent problems
 - Due to how Case Manager administration client and configuration tool work.
- Tech note: <http://www-01.ibm.com/support/docview.wss?uid=swg21683603>

Section 2: Maintenance and Best Practices

Managing Solution Versions – Roll back solutions to earlier versions

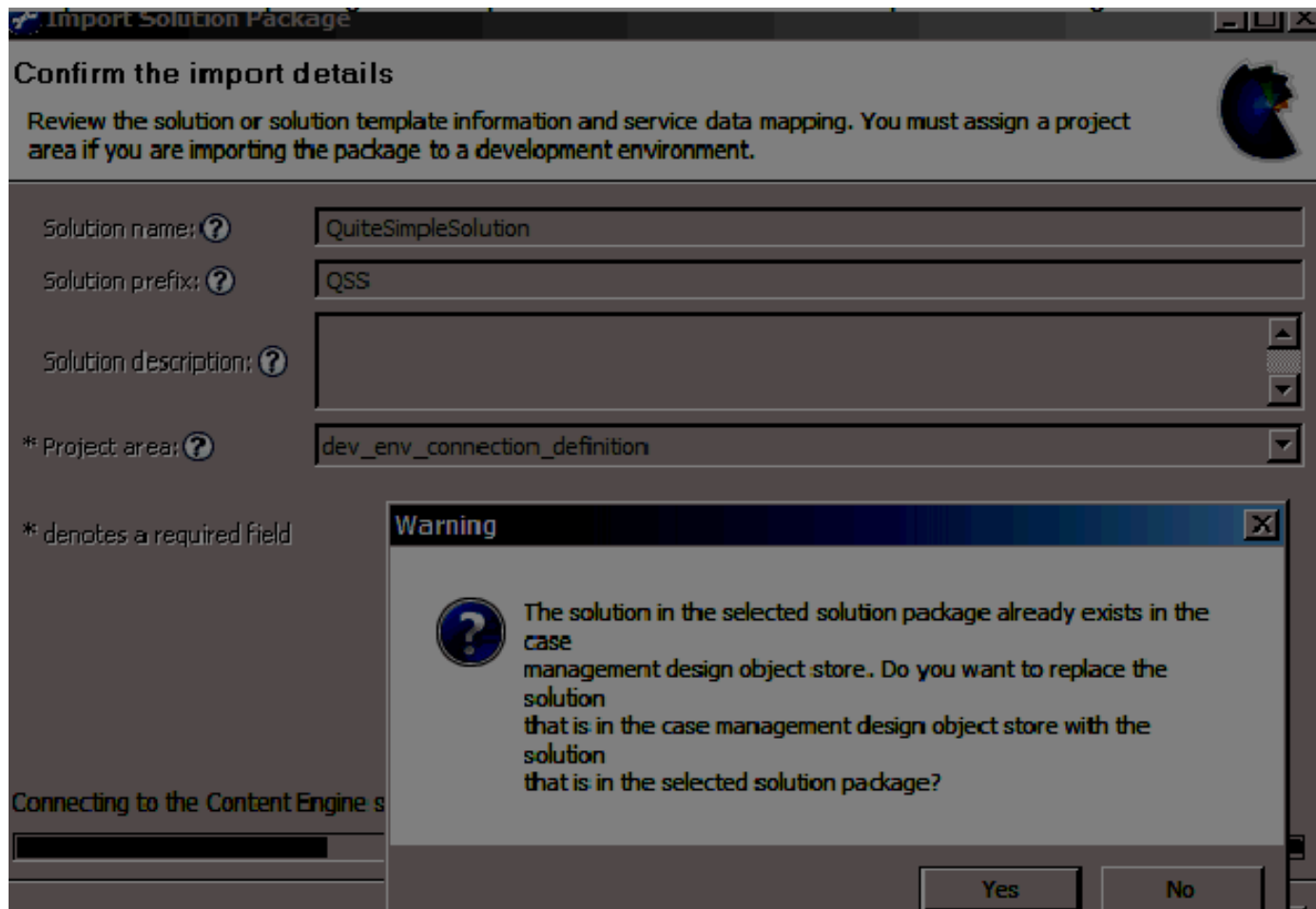


PROBLEM:

- The intuitive way of rolling back a solution to an earlier version is not reliable
- Importing the solution package of an earlier version on top of the current version often fails

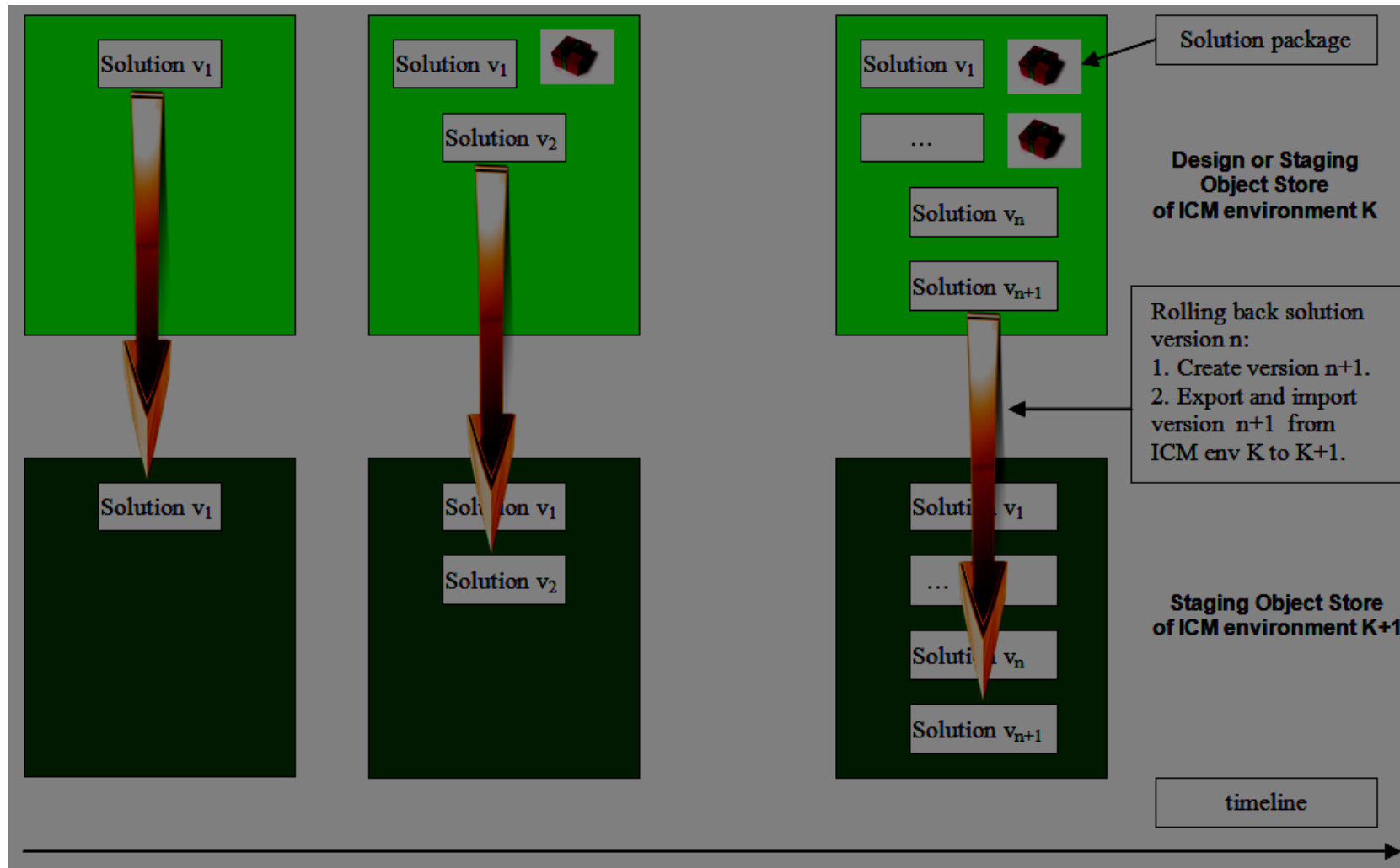
Section 2: Maintenance and Best Practices

Managing Solution Versions – Roll back solutions to earlier versions



Section 2: Maintenance and Best Practices

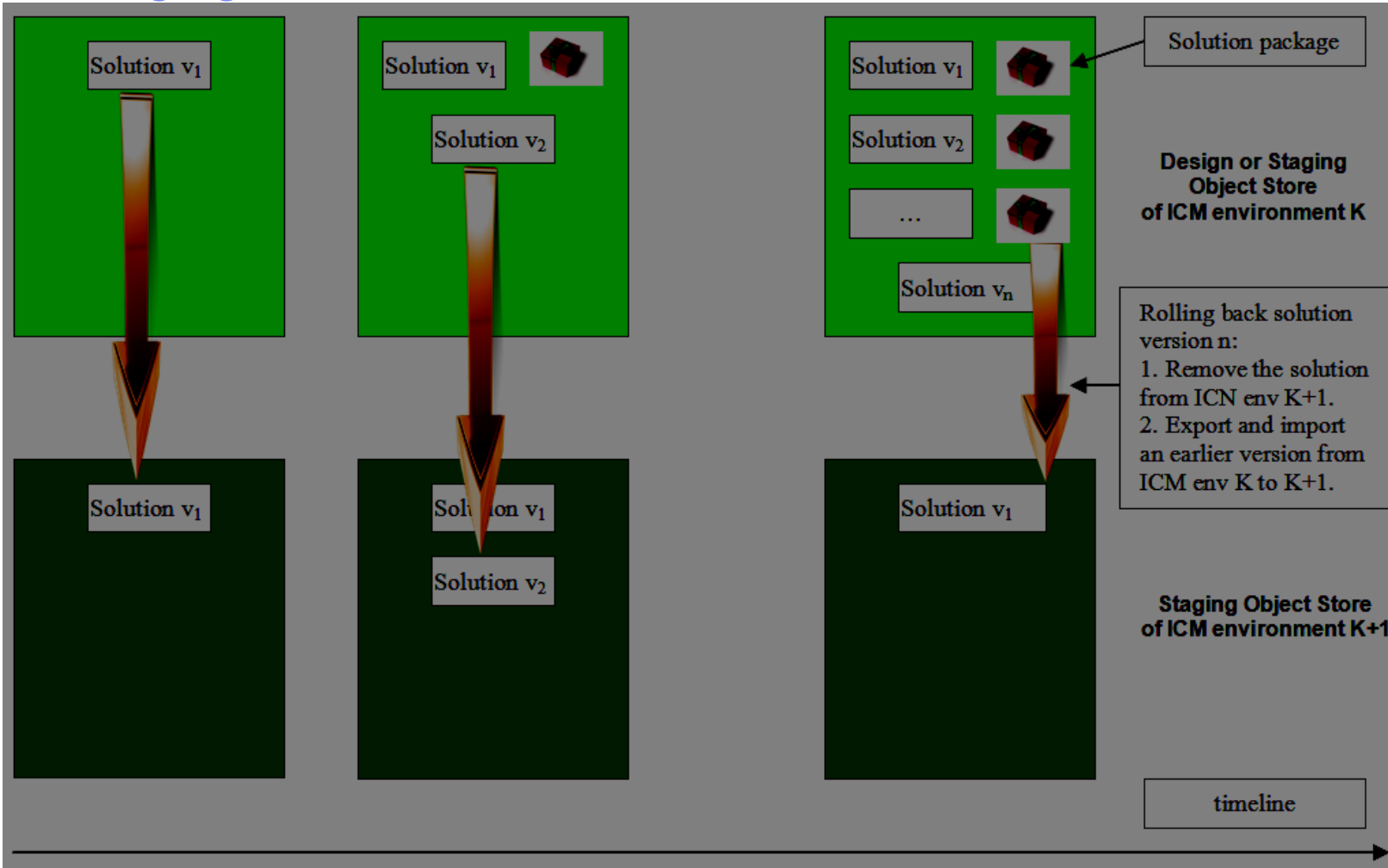
Managing Solution Versions – Roll back solutions to earlier versions



Best practice: to roll back a solution to an earlier state, update the current version of the solution (version n) to create a newer version (version n+1) and export and import the newer version to the next environment.

Section 2: Maintenance and Best Practices

Managing Solution Versions – Roll back solutions to earlier versions



Best practice to roll back a solution using a solution package of an earlier version:

1. Remove the solution from the design or staging object store.
2. Remove the solution deployment with 'Reset Test Environment'.
3. Import and deploy the solution package of the earlier version.

Section 2: Maintenance and Best Practices

- Managing Solution Versions
- **Solution Security**
- Solution Deployment
- Deleting Cases

Maintenance and Best Practices

Solution Security

■ Security Wizard – new in ICM 5.2

http://www-01.ibm.com/support/knowledgecenter/SSCTJ4_5.2.0/com.ibm.casemgmt.design.doc/acmdc001.htm

–New tool in ICM 5.2

–Accessible in the ICM administration client

–Provides a case management solution-oriented view of the security configuration

–Makes security configuration of solutions

- simpler
- easier to review
- more consistent
- transferable across ICM environments

■ Security Manifest:

–Various content- and workflow-related permissions are organized into logical settings appropriate for a case management environment

■ developerWorks: ICM 5.2 Security Model Considerations and Best Practices

https://www.ibm.com/developerworks/community/groups/service/html/communityview?communityJuid=e8206aad-10e2-4c49-b00c-fee572815374#fullpageWidgetId=Wf2c4e43b120c_4ac7_80ae_2695b8e6d46d&file=e7f217f2-62bc-400d-88b8-8104f1908a81

■ Knowledge Center documentation

http://www-01.ibm.com/support/knowledgecenter/SSCTJ4_5.2.0/com.ibm.casemgmt.design.doc/acmsc000.htm

Maintenance and Best Practices

Solution Security

The screenshot shows the 'Configure Security' wizard interface. At the top, there are tabs for 'STAGING', 'Solutions', and '*Configure Security'. Below the tabs are navigation buttons: 'Back', 'Next', 'Save', 'Apply', and 'Cancel'. The main area contains a table with the following structure:

Case Type	Role	Create Case	View Case	Update Case	Manage Case
▼ All Case Types					
	Customer Service Representative	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Dispute Advisor	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Dispute Supervisor	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Fraud Analyst	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Senior Fraud Analyst	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

This is a sample screenshot from the Security Wizard. It shows mapping ICM-level permissions to ICM roles.

Best Practice: do as much of the ICM security configuration with the Security Wizard as possible

Section 2: Maintenance and Best Practices

- Managing Solution Versions
- Solution Security
- **Solution Deployment**
- Deleting Cases

Maintenance and Best Practices

Solution Deployment

■ DeveloperWorks: IBM Case Manager 5.2 Solution Deployment Guide

https://www.ibm.com/developerworks/community/blogs/e8206aad-10e2-4c49-b00c-fee572815374/entry/ibm_case_manager_5_2_solution_deployment_guide?lang=en&acss=danl_705_web

■ Tech note: How do I troubleshoot deployment or security related issues in IBM Case Manager 5.2?

http://www-01.ibm.com/support/docview.wss?uid=swg21648669&acss=danl_705_web

■ Log and traces

–Target object store has logs in the solution folder

•Detailed Deployment log

•Error Deployment log

■Java application server logs (e.g. SystemOut.log) for CPE, Case Manager servers

■Depending on where you attempted to deploy:

•ICM administration client logs

•ICM configuration tool log

■Possible tracing options to enable:

–Case Manager server WebSphere admin console: com.ibm.casemgmt.api

–CPE subsystem tracing: EJB, Error

–CPE Process service tracing in vwtool: API RPC, API RPC IN, Exception

■ Best practice for editing existing solutions: follow solution editing guidelines to prevent deployment errors and problems after deployment

Redeployment restrictions for modifying a solution

http://www-01.ibm.com/support/knowledgecenter/SSCTJ4_5.2.1/com.ibm.casemgmt.design.doc/acmdc024.htm

Section 2: Maintenance and Best Practices

- Managing Solution Versions
- Solution Security
- Solution Deployment
- **Deleting Cases**

Maintenance and Best Practices - Deleting Cases

When you need to delete a case make sure you follow these tasks in order.

Main tasks:

- 1) Process the case tasks
- 2) Delete the case work items using Process Administrator
- 3) Remove the document's reference to the case object and move or delete documents
- 4) Delete the case folder.

Tools Required:

- Administration Console for Content Platform Engine (ACCE)
- Process Administrator (PA)

Maintenance and Best Practices - Deleting Cases

Process the case tasks

1. Open the Target Object Store in ACCE and go to the case.
2. Click the folder and select the Tasks tab.

Administration Console for Content Platform Engine

IBM ECM | CMTOS x

Object Store: CMTOS

CMTOS

- Administrative
- Browse
 - Root Folder
 - Banking
 - CibRoles
 - CibTeamspaces Templates
 - CibTeamspaces
 - CodeModules
 - IBM Case Manager
 - Solution Deployments
 - New Account Opening
 - Case Types
 - NAO_NewAccount
 - Cases
 - 2013
 - 09
 - 18
 - 0014
 - 000000100006

Folder: 000000100006

Save Refresh Actions Close

General Properties Annotations Security Policy Security Retention **Tasks**

New Delete Promote Demote

| <input type="checkbox"/> | Name | Type | State |
|--------------------------|---------------------|---------------------|----------------------|
| <input type="checkbox"/> | Wire Transfer | Wire Transfer | Waiting Precondition |
| <input type="checkbox"/> | Identity Resolution | Identity Resolution | Complete |
| <input type="checkbox"/> | Welcome Package | Welcome Package | Waiting Precondition |
| <input type="checkbox"/> | Account Transfer | Account Transfer | Waiting Precondition |
| <input type="checkbox"/> | Deposit | Deposit | Waiting Precondition |
| <input type="checkbox"/> | Open Account | Open Account | Working |

Maintenance and Best Practices - Deleting Cases

Remove the dormant tasks

3.Delete all tasks that are in the Waiting or Ready state.

The screenshot shows the IBM Case Manager interface for a folder named '000000100006'. The 'Tasks' tab is selected, and the 'Delete' button is highlighted with a red box. Below the buttons is a table of tasks with columns for Name, Type, and State.

| | Name | Type | State |
|-------------------------------------|---------------------|---------------------|----------------------|
| <input checked="" type="checkbox"/> | Wire Transfer | Wire Transfer | Waiting Precondition |
| <input type="checkbox"/> | Identity Resolution | Identity Resolution | Complete |
| <input checked="" type="checkbox"/> | Welcome Package | Welcome Package | Waiting Precondition |
| <input checked="" type="checkbox"/> | Account Transfer | Account Transfer | Waiting Precondition |
| <input checked="" type="checkbox"/> | Deposit | Deposit | Waiting Precondition |
| <input type="checkbox"/> | Open Account | Open Account | Working |

Maintenance and Best Practices - Deleting Cases

Record the ID value of active tasks

4. Find the ID property for all Task in a Working or Failed state and note its value.

The screenshot shows the IBM CMTOS interface. On the left, a folder view displays a table of tasks. The 'Open Account' task is selected. A callout box labeled 'Click the task' points to this row. On the right, the 'Open Account' task's properties are displayed. A callout box labeled 'Open Properties' points to the 'Properties' tab. Within the properties, the 'ID' property is highlighted with a callout box labeled 'Record the ID value'.

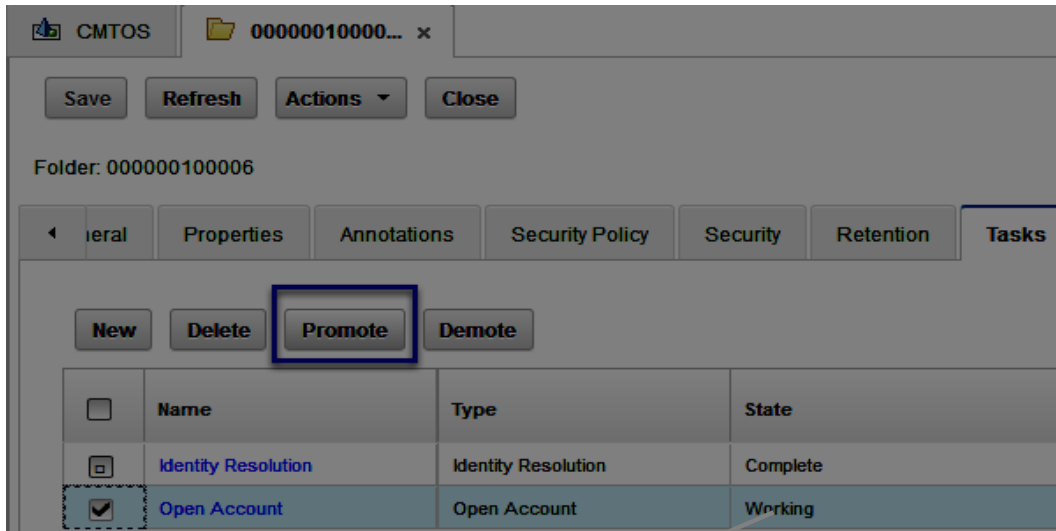
| Name | Type | State |
|---------------------|---------------------|----------|
| Identity Resolution | Identity Resolution | Complete |
| Open Account | Open Account | Working |

| Property Name | Property Value |
|--------------------|---|
| Date Last Modified | September 18, 2013 at 8:10:55 AM Pacific Daylight |
| ID | {34C62968-8D18-4414-9892-92948CC45065} |
| Name | Open Account |

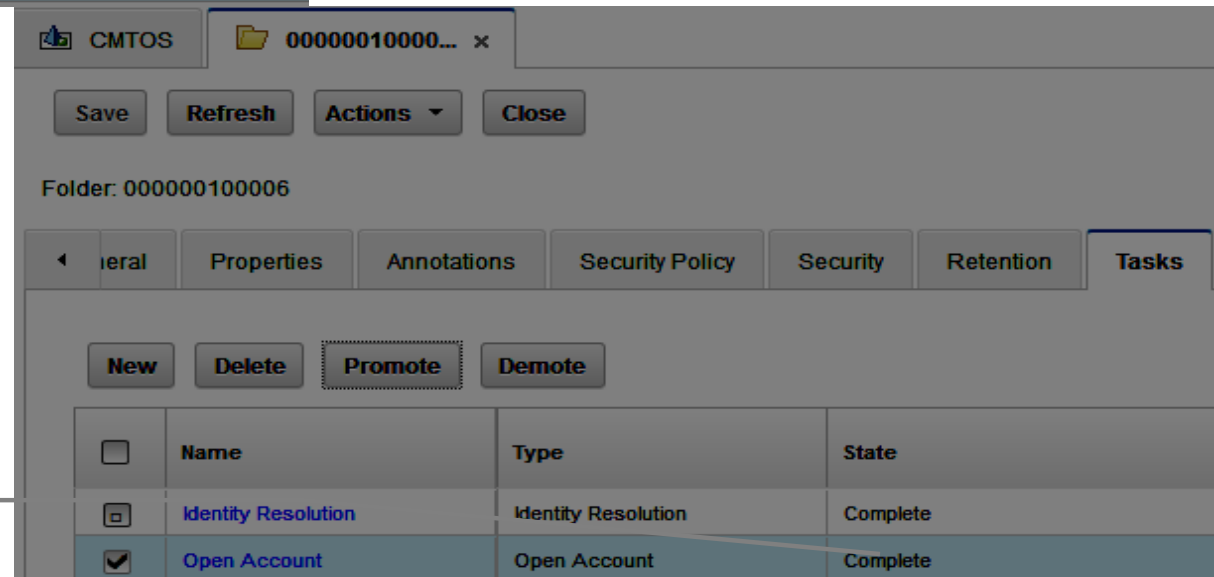
Maintenance and Best Practices - Deleting Cases

Promote the active tasks

5. Promote all of the Failed and Working state tasks.



Before Promote

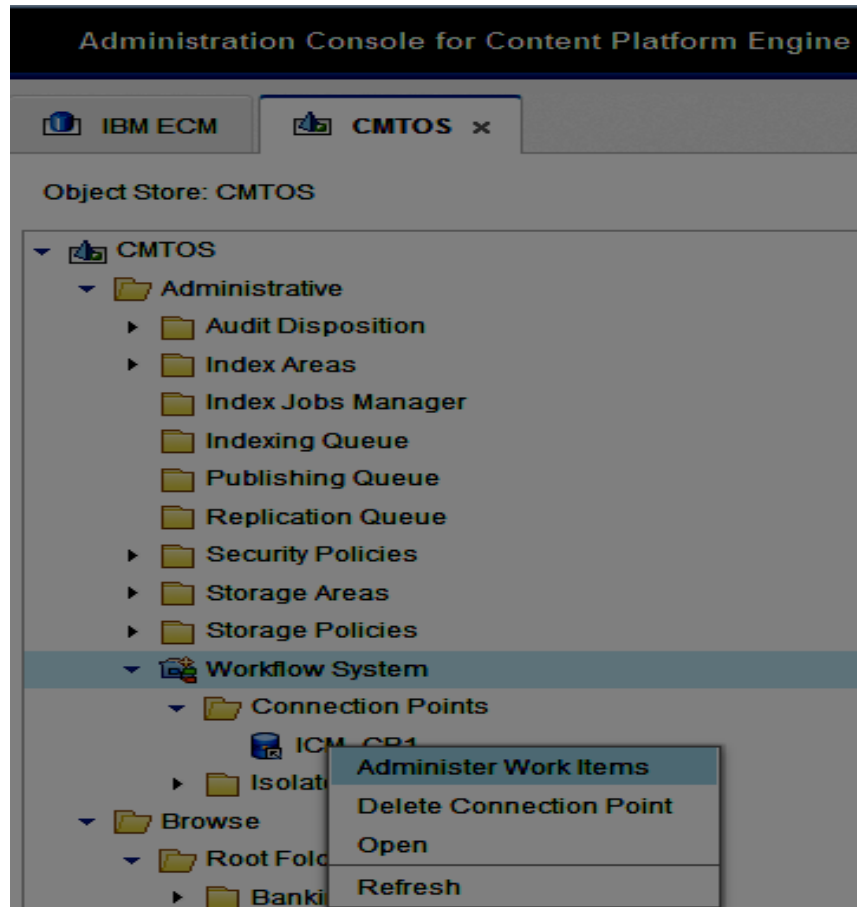


After

Maintenance and Best Practices - Deleting Cases

Delete the case work items using Process Administrator

6. Open Process Administrator on the Target Object Store connection point.



Maintenance and Best Practices - Deleting Cases

Find the case work items using Process Administrator

7. Under **Look for**: select Workflows, For **In**: choose Workflow Roster, For **Select one**: <pick the name of the solution>
8. In the Search mode field, select Edit (all fields).
9. Under Search Fields select F_CaseTask(Guid) and enter the ID in the Value box.

The screenshot shows the IBM Process Administrator search interface. The search criteria are configured as follows:

- Look for:** Workflows
- In:** Workflow Roster
- Select one:** NewAccountOpening
- Search mode:** Edit (all fields)
- Max returned per set:** 50
- Search Fields:** F_CaseTask (Guid)
- Operator:** is equal
- Value:** 34C62968-8D18-4414-9892-92948CC45065

The search results table is as follows:

| F_WobNum | F_CaseTask | F_Originator | F_Subject | F_StartT |
|----------------------------------|--|--------------|--------------|-----------|
| B2C6584C40AE884A85318D7FF98E859F | {34C62968-8D18-4414-9892-92948CC45065} | 50 (P8Adm... | Open Account | Sep 18, 2 |

Maintenance and Best Practices - Deleting Cases

Delete the case work items

10. Right-click the workflow and then click **Tasks > Delete Work**.
11. Click OK to confirm that you want to delete the work item or items.

The screenshot shows a software interface with a search filter at the top and a table below. The search filter has the following fields:

- Search Fields:** F_CaseTask (Guid)
- Operator:** is equal
- Value:** 34C62968-8D18-4414-9892-92948CC45065

Below the search filter, there are buttons for AND, OR, (, and), and a Clear button. The search results area shows the query: F_CaseTask = 0x6829C634188D1444989292948CC45065.

The table below has the following columns: F_WobNum, F_CaseTask, F_Originator, F_Subject, and F_Stat. The first row is highlighted, and a context menu is open over it. The menu items are:

- Lock/Unlock
- Save/Discard
- View Information Stack...
- Refresh Selection
- Open Item
- Print Search Results...
- Export to a File...
- Edit Field Values...
- Next Set of Results
- Show/Hide Columns...
- Select Column
- Tasks

The 'Tasks' menu item is expanded, showing the following options:

- Workflow Groups...
- Trackers...
- Assign/Reassign Work...
- Complete Work...
- Delete Work** (highlighted)
- Terminate Work
- Unlock Work By Users/Queues...
- Out of Office...

| F_WobNum | F_CaseTask | F_Originator | F_Subject | F_Stat |
|----------------------------|----------------------------|--------------|--------------|--------|
| B2C6584C40AE884A85318D7... | 18-4414-9892-92948CC45065} | 50 (P8Adm... | Open Account | Sep 18 |

Maintenance and Best Practices - Deleting Cases

Remove the supporting document's reference to the Associated Case object

To be able to reuse documents from deleted cases, you must remove the reference to the Associated Case object in the document property before you delete the case.

12. Back in ACCE, select to the task sequence folder:

Year > Month > Day > number > task_sequence. Ex. 2013 > 09 > 18 > 0032 > 000000100006

13. Click the supporting document link on the Contents tab. Ex. Account Application.

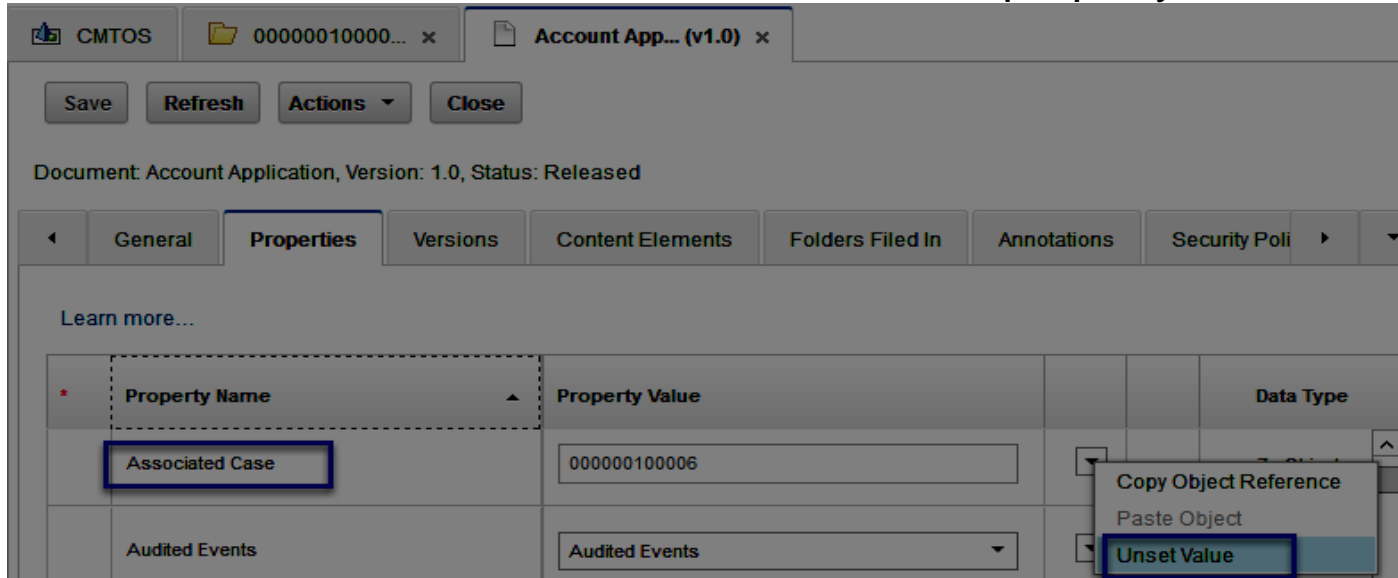
The screenshot shows the ACCE interface with a folder named '000000100006' selected. The 'Contents' tab is active, displaying a table of documents. One document is highlighted with a blue border:

| Containment Name | Document Name | Date Created | Created By |
|--|---------------------|--|------------|
| {233FCC30-B81E-44CB-B3DA-CDC258374848} | Account Application | September 18, 2013 at 8:10:51 AM Pacific Daylight Time | P8Admin |

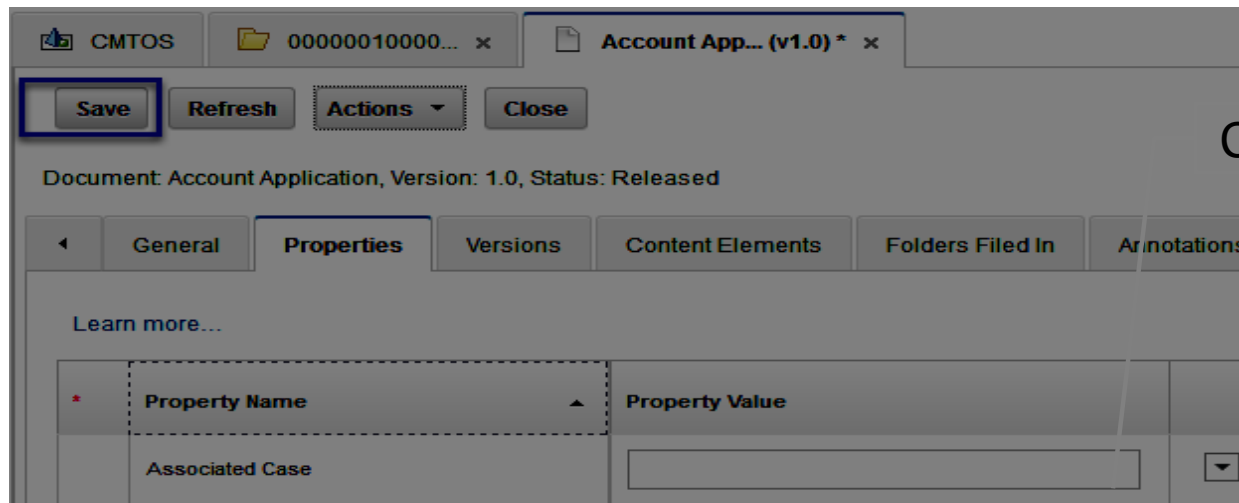
Maintenance and Best Practices - Deleting Cases

14. Select the document's Properties tab.

15. Click the arrow next to the Associated Case property value and select Unset Value.



16. Save.



Case folder is removed

Maintenance and Best Practices - Deleting Cases

Handle supporting documents.

17. Move or delete the supporting documents.

If the documents need to be saved move them out of the Supporting Documents folder. If not delete them.

The screenshot shows a software interface with a context menu open over a document. The menu options are:

- New Folder
- New Document
- New Custom Object
- New Subscription...
- Add Annotation
- Change Class...
- Index for Content Search
- View Index Requests...
- Copy Object Reference
- Rename folder
- Delete** (highlighted)

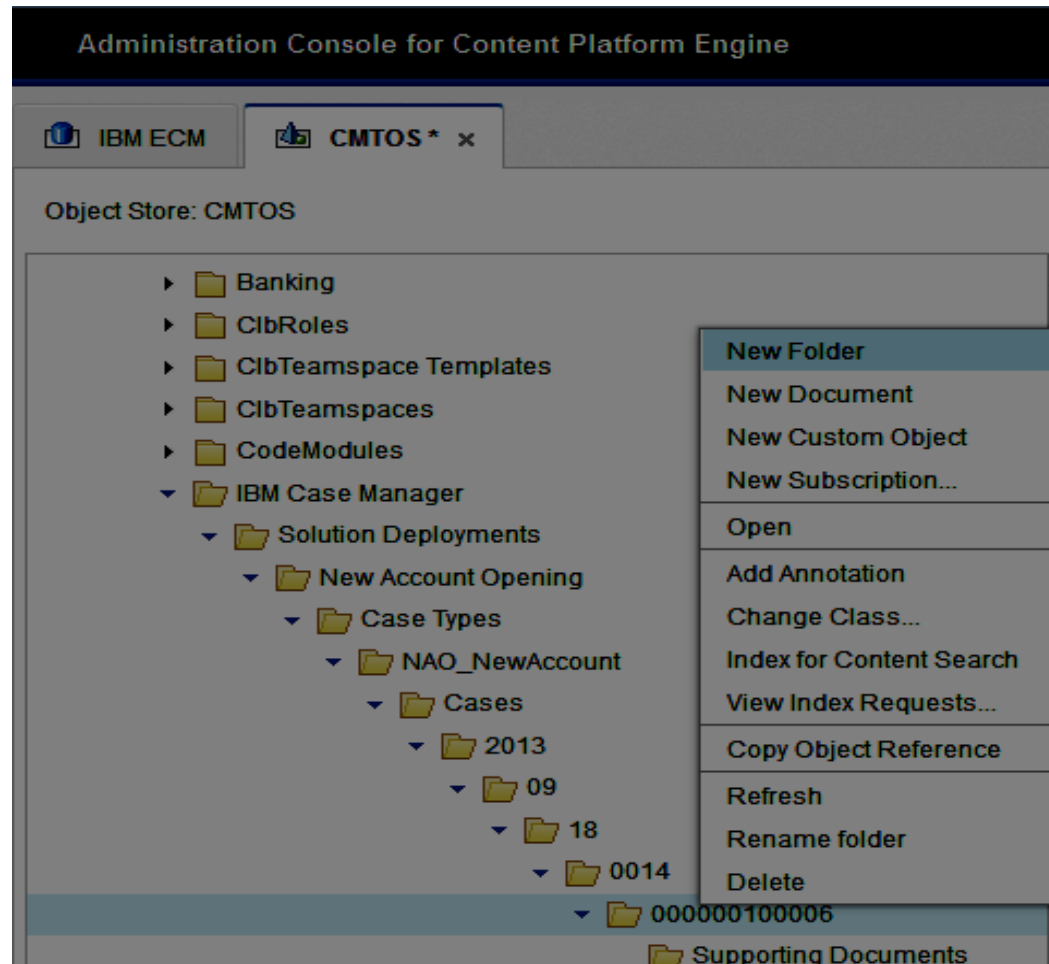
The background interface includes a table with the following data:

| Document Name | Date Created | Created By | Class | Major V Number |
|-------------------------|---|------------|----------|----------------|
| Account Application.txt | November 18, 2014 at 8:51:09 AM Pacific Standard Time | P8Admin | Document | 1 |

Maintenance and Best Practices -Deleting Cases

Delete the Case Folder

18. Right-click the task_sequence and click Delete.
19. Click OK when the “Are you sure” warning is displayed.



Maintenance and Best Practices - Deleting Cases

****Remember****

- 1)When you delete a case, all of the open work items, tasks, and comments that are associated with the case are removed permanently
- 2)The task workflows associated with active tasks must be removed **before** the case folder is deleted.
- 3)You will not be able to delete the case folder if there are subfolders that contain dependent objects.

More Information from the 5.2 Knowledge Center

Deleting a case

http://www-01.ibm.com/support/knowledgecenter/SSCTJ4_5.2.0/com.ibm.casemgmt.design.doc/acmta012.htm?lang=en

Section 3: Troubleshooting with IBM Support

Getting Help with IBM Case Manager 5.2

Eventually you will need help. Keep these things in mind when you contact IBM Support.

IBM Support uses a systematic approach to solving a problem.

Why?

- To apply lessons learned through experience.
- To provide similar communication across different geographic locations.
- Uniform documentation makes searching PMR archives easier.

Perform the following for each PMR:

1. Define the problem or question.
2. Search knowledge bases.
3. Open a PMR with IBM Support.
4. Collect a data set.
5. Upload the data set to the PMR.

Section 3: Troubleshooting with IBM Support

How can we help you? What is the issue?

The better the description the less time it takes to resolve the problem. Define it for yourself first to better understand the issue. Pass it on to IBM when it is time to open a PMR.

Make sure to answer these questions in the problem description:

1. What are the symptoms of the problem?
2. Where does the problem occur?
3. When does it happen?
4. What conditions bring on the issue?
5. Can it be reproduced?
6. What are the system's current software levels?
7. Have there been any changes made recently?
8. Is there a workaround?



Section 3: Troubleshooting with IBM Support

Search the IBM knowledge bases

There is a wealth of knowledge available.

Try searching yourself first to see if you have encountered a known problem or have a FAQ.

Search the IBM Support Portal

A unified, centralized view of all technical support tools and information for all IBM systems, software, and services

www.ibm.com/supportportal

Use IBM Support Assistant

ISA is a no-charge software serviceability workbench that allows you to search for content and collect data.

<http://www-01.ibm.com/software/support/isa/>

Search outside of IBM using an external search engine.

Sometimes you can find useful information in newsgroups, forums, and blogs that are outside of the IBM domain.

Section 3: Troubleshooting with IBM Support

Open a PMR with IBM Support

Before you contact IBM Software Support, your company must have an active IBM software subscription, a valid support contract, and you must be authorized to submit problems to IBM.

Three ways to engage IBM Support:

1. Online

Use the Service Request portlet on the Service Request page of the IBM Support Portal.

<https://www-947.ibm.com/support/servicerequest/Home.action>

2. Phone

For the phone number to call in your country, see the Directory of worldwide contacts web page.

www.ibm.com/planetwide

3. IBM Support Assistant (ISA)

ISA can help gather data and open PMRs.

Section 3: Troubleshooting with IBM Support

Provide a data set

- Take screenshots that help explain the problem and display error messages.
- Collect the logs that capture the problem.
- Provide the date and time the issue occurred
- Avoid uploading very large log files that contain irrelevant data.

Compress your files into an archive folder.

Name the file using your full PMR Number + file name or description + your compression program's file extension.

Example:

PMR Number = 12345.123.000 using WinZip to compress files on April 15th.
12345.123.000.april15.zip or 12345.123.000.0415.tar

IMPORTANT: Only use upper or lower-case (A-Z), numbers (0-9), period (.) and hyphen (-)
Do not use blank or special characters, i.e. \$, @, !, # in file names.

Section 3: Troubleshooting with IBM Support

Attach the data to the PMR

1. Email

Email files up to 20 MB using the following address and the PMR number as the subject line:

To: im_support@ecurep.ibm.com

Subject:12345.123.000

2. FTP

http://www-05.ibm.com/de/support/ecurep/send_ftp.html#ftps

Secured FTP

Secure Upload at <https://www.ecurep.ibm.com/app/upload>

SSH Upload (Port 22) - [sftp.ecurep.ibm.com](https://www.ecurep.ibm.com)-

3. Unsecured FTP

Using the FTP command line or any FTP program send the file to [ftp.ecurep.ibm.com](ftp://ecurep.ibm.com)

Login with anonymous as the ID. Use an email address as the password

Copy the file to /toibm/im

Section 3: How IBM works

Things to remember..

- Skilled IT Administrator should be available to work with IBM.
- Support is a callback service.
- Engineers are not designated to customers.

Off-shift support

- General language is English
- Reserved for business critical issues on production systems

For help with critical projects (i.e. install, upgrade, or migration) notify support ahead of time and schedule a lab services engagement via your IBM Sales representative.

More information:

Software Support Handbook

<http://www-304.ibm.com/support/customercare/sas/f/handbook/home.html>

Summary

■Managing Solution Versions

- Have a consistent method of tracking solution versions accross all environments.
- Do not re-import solution package of older solution version on top of current version.
- In order to restore a previous version:
 - if solution is deployed in production, re-edit the solution instead of rolling back
 - if solution is deployed in development only, you can remove solution from the design and target object stores and re-import older solution package

■Solution Security

- Configure as much of the ICM security settings with the Security Wizard as possible.

■Solution Deployment

- Review the solution deployment logs in the solution folder in the target object store.
- For redeploying existing solutions, follow solution editing guidelines to prevent problems and unexpected behavior.

■Deleting Cases

- Make sure you have the right case
- Take screenshots of the ID property for the “Working” tasks.
- Don't forget to unset the supporting documents

■Working with IBM Support

- Provide detailed problem descriptions
- Search knowledge bases
- Use IBM Support Assistant to make the PMR process easier.

Questions?



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