

IBM Cúram Social Program Management  
Version 7.0.3

*Cúram Social Enterprise Collaboration  
Configuration Guide*



**Note**

Before using this information and the product it supports, read the information in [“Notices” on page 20](#)

**Edition**

This edition applies to IBM® Cúram Social Program Management v7.0.3 and to all subsequent releases unless otherwise indicated in new editions.

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# Contents

|   |           |
|---|-----------|
| <b>List of Tables.....</b>  | <b>iv</b> |
| <b>Chapter 1. Configuring Social Enterprise Collaboration.....</b>          | <b>1</b>  |
| Introduction.....   | 1         |
| Purpose.....  | 1         |
| Audience.....   | 1         |
| Prerequisites.....  | 1         |
| Chapters in this Guide.....   | 1         |
| Configuring Social Enterprise Folders and Multidisciplinary Teams.....      | 2         |
| Introduction.....   | 2         |
| (deprecated) Configuring the SEF Types.....                                 | 2         |
| Configuring Multidisciplinary Teams and Team Members.....                   | 3         |
| (deprecated) Configuring the Case Types Supported in SEFs.....              | 3         |
| (deprecated) Configuring SEF Relationships.....                             | 4         |
| Configuring MDT Member Notifications.....                                   | 4         |
| Configuring the MDT Portal.....   | 4         |
| Configuring Discussions.....  | 5         |
| Introduction.....   | 5         |
| Configuring the Default Type of Discussion Moderator.....                   | 5         |
| Specifying a User as the Default Moderator for Discussions.....             | 6         |
| Configuring the Number of Comments Per Discussion Page.....                 | 6         |
| Providing Access to Discussion View Page in Email Notifications.....        | 6         |
| Providing Access to Stop Watching Discussions in Email Notifications.....   | 6         |
| Emailing Discussion Watchers when Updates Occur.....                        | 6         |
| (deprecated) Configuring Transaction Histories.....                         | 6         |
| (deprecated) Introduction.....  | 7         |
| (deprecated) Enabled SEF Transactions.....                                  | 7         |
| (deprecated) Adding Application Properties to Disable SEF Transactions..... | 14        |
| Sample Application Properties for Disabling Transactions.....               | 14        |
| Conclusion.....   | 16        |
| Summary of SEF and MDT Configuration Options.....                           | 16        |
| Summary of Discussion Configuration Options.....                            | 17        |
| Compliance.....   | 18        |
| Introduction.....   | 18        |
| Public API.....   | 18        |
| Identifying the API.....  | 18        |
| Outside the API.....  | 19        |
| <b>Notices.....</b>   | <b>20</b> |
| Privacy Policy considerations.....  | 21        |
| Trademarks.....   | 21        |

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# List of Tables

- 1. Process to Determine User Assigned to Role of Discussion Moderator..... 5
- 2. Transaction Types for Social Enterprise Folder Statuses, Cases, and Clients..... 7
- 3. Transaction Types for Multidisciplinary Teams and Team Members..... 8
- 4. Transaction Types for Meetings and Meeting Minutes..... 9
- 5. Transaction Types for Discussions..... 9
- 6. Transaction Types for Communications..... 10
- 7. Transaction Types for Attachments..... 12
- 8. Sample Application Property for Disabling Multidisciplinary Team Added Transaction..... 14
- 9. Sample Application Property for Disabling Multidisciplinary Team Removed Transaction..... 15
- 10. Sample Application Property for Disabling Multidisciplinary Team Member Added Transaction..... 15
- 11. Sample Application Property for Disabling Multidisciplinary Team Member Removed Transaction..... 16
- 12. Summary of SEF and MDT Application Properties..... 17
- 13. Summary of Discussion Application Properties..... 18

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# Chapter 1. Configuring Social Enterprise Collaboration


You can configure the information that is displayed in social enterprise folders and multidisciplinary team portals. The tools available in the social enterprise folders and multidisciplinary team portals can be configured. Tools are provided to report incidents, record transactions, and post discussions.

**Note:**  Social Enterprise Folders (SEF) and Case Participant Index (CPI) are deprecated. For more information, see [Deprecated features](#)

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## Introduction

### Purpose

**Note:**  Social Enterprise Folders (SEF) and Case Participant Index (CPI) are deprecated. For more information, see [Deprecated features](#)

The purpose of this guide is to describe the configuration options for social enterprise folders and multidisciplinary teams as part of Cúram Social Enterprise Collaboration. This includes determining the information that is displayed in social enterprise folders and multidisciplinary team portals. It also includes configuring the tools available within the social enterprise folders and multidisciplinary team portals. Tools are provided to report incidents, record transactions, and post discussions.

Please be advised that this guide does not describe the configuration options for the Cúram Citizen Context Viewer. This information is provided in the Cúram Citizen Context Viewer Configuration Guide.


### Audience

This guide is intended for administrators responsible for configuring the Cúram Social Enterprise Collaboration components. It is assumed that the administrators have worked with code tables, application properties, and system security as part of Cúram system administration.

### Prerequisites

The Cúram Social Enterprise Collaboration Guide is a reading prerequisite.

### Chapters in this Guide

**Note:**  Social Enterprise Folders (SEF) and Case Participant Index (CPI) are deprecated. For more information, see [Deprecated features](#)

The following list describes the chapters within this guide:

#### **Configuring SEF Types and their Multidisciplinary Teams**

This chapter describes the configuration of social enterprise folder types, multidisciplinary teams, team members, roles, sharing options and the multidisciplinary team portal.

#### **Configuring Discussions**

This chapter describes the configuration options for discussions. Notifications can be set up for discussions to keep interested parties informed.

#### **Configuring Transaction Histories**


This chapter describes the social enterprise folder transactions that have been enabled and provides information on how to disable them.

## Conclusion


This chapter provides a summary of the social enterprise folder configuration options described throughout the guide.

## Configuring Social Enterprise Folders and Multidisciplinary Teams

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**Note:**  Social Enterprise Folders (SEF) and Case Participant Index (CPI) are deprecated. For more information, see [Deprecated features](#)

### Introduction

**Note:**  Social Enterprise Folders (SEF) and Case Participant Index (CPI) are deprecated. For more information, see [Deprecated features](#)

This chapter describes the configuration options available within Cúram Social Enterprise Collaboration administration. This includes setting up social enterprise folder types, predefined multidisciplinary teams, and multidisciplinary team members. This chapter also describes the configuration options available as property settings for social enterprise folders and multidisciplinary teams. For social enterprise folders, this includes configuring the case types that can be added to social enterprise folders and configuring the automatic creation of social enterprise folder relationships. For multidisciplinary teams (MDTs), this includes configuring MDT member notifications and the configuration options for the MDT portal.

### (deprecated) Configuring the SEF Types



Each social enterprise folder type is associated with a multidisciplinary team type. Multidisciplinary team types can either be predefined or else defined from within a specific social enterprise folder. A home page identifier can be set if the default home page provided out of the box to view this type of SEF in the MDT Portal needs to be overridden.

**Note:** Social enterprise folder types are associated with the SEFType code table. A new type can be dynamically added to this code table and published as part of system administration.

### (deprecated) Setting Up Predefined MDTs



Social enterprise folder types can be associated with predefined multidisciplinary teams by selecting the 'Predefined' multidisciplinary team type. When a social enterprise folder is created for the social enterprise folder type, its multidisciplinary team must be selected from the list of pre-configured multidisciplinary teams (see [“Configuring Multidisciplinary Teams and Team Members”](#) on page 3).

In some jurisdictions, membership for multidisciplinary teams is defined by statute. Also, multidisciplinary teams dealing with child welfare cases may be required by law to include law enforcement, child protection or family services, and prosecution participant. The business logic for selecting predefined MDTs is described in the Cúram Social Enterprise Collaboration Guide.


### (deprecated) Defining a Multidisciplinary Team for an Individual SEF



When the 'Define From Social Enterprise Folder' option is selected (instead of the 'Predefined' option), individual multidisciplinary team members are manually defined for the social enterprise folders.

An example of where this is appropriate is an ongoing child welfare case aimed at assisting children within a family who have been in abusive situations. The multidisciplinary team assigned to helping these children would include persons with experience working with the children and who have established positive relationships with the family, e.g., teachers, coaches, etc. For more information, see the Cúram Social Enterprise Collaboration Guide.

## Configuring Multidisciplinary Teams and Team Members

**Note:**  Social Enterprise Folders (SEF) and Case Participant Index (CPI) are deprecated. For more information, see [Deprecated features](#)

The main task for configuring predefined multidisciplinary teams is to define the team members. There are three options for selecting team members: selecting from existing team members, adding new team members who can then be selected for other teams in the future, and selecting from existing system users.

Multidisciplinary team members are configured on the View Multidisciplinary Team page. The first MDT member added to a team is the default lead member. The lead member can be changed at any time to any active member of the MDT.

Each team member on the team must fulfill a role within their multidisciplinary teams, e.g., psychologist, nurse, and so on. Roles must be defined before a multidisciplinary team member can be assigned a role. A role can be defined using the New Role page.

The Role field captures the Role name. The Type is used to identify if this role applies to an external user (MDT member) or an internal user (internal system user).

Outcome plan activities (services, actions, referrals) may be shared with external multidisciplinary team members via the collaborative outcome plan. Notes and attachments may be shared with external multidisciplinary team members via the collaborative outcome plan and collaborative investigation. The Sharing options dictate the information that multidisciplinary team members assigned to this role will have access to in the MDT portal. Note these options are only available for roles of type external. Internal system users access is controlled by sensitivity checking. Attachments, Activities and Notes can be shared. For each option the following options are available:

- Not Shared - This means that the item cannot be shared with the team member assigned to the specified role. If defined, team members with this role will not appear in the lists of team members with whom the item can be shared.
- Shared (Preselected) - If defined, any team member who fills the specified role will be included in the list of members with whom the item can be shared. The checkbox displayed in the list to indicate whether the item is to be shared with the team member will be automatically selected.
- Shared (Not Preselected) - If defined, any team member assigned to the specified role will be included in the list of members with whom the item can be shared. The checkbox displayed in the list to indicate whether the item is to be shared with the team member will not be selected. The user must click on the checkbox to share the item with the team member.

In addition to viewing and maintaining team members as part of an MDT team, configuration options are available to maintain a team member's contact details, define the team member's skills, and add a member to any number of teams from the View Multidisciplinary Team page.

MDT members are assigned a sensitivity level which determines security access to data in the MDT portal. Sensitivity checking is performed by comparing the MDT member's sensitivity level to the sensitivity level of secured data (sensitivity levels range from 1-5 with 5 being the most secure level). The following data is assigned a sensitivity level and therefore may impact MDT member access to that data: discussions, incidents, clients, cases, social enterprise folder transactions, attachments, meetings, communications, meeting minutes.

### (deprecated) Configuring the Case Types Supported in SEFs



There are two application properties for configuring the case types supported in social enterprise folders (SEFs). These are the case types that can be part of social enterprise folders. One application property is used to support all case types; the other is used to select the specific case types.

- The application property, `curam.ise.sef.casetypes.allowall`, indicates whether or not all case types are supported in social enterprise folders. The default value is 'NO'.

- The application property, `curam.ise.sef.casetypes`, indicates the specific case types that are supported in social enterprise folders. This is achieved by setting the value of this property to be a comma-delimited list of codes from the `CaseTypeCode` codetable. The default value is 'CT2,CT5', the codes for the product delivery and integrated case types.

## **(deprecated) Configuring SEF Relationships**



The application property, `curam.ise.sef.client.createrelationship`, is used to configure the automatic creation of social enterprise folder relationships when new clients are added to a social enterprise folder. The default value is `YES`; when a new client is added to a social enterprise folder, the system will automatically create a relationship between the social enterprise folder the client is being added to and any of the client's existing social enterprise folders.

## **Configuring MDT Member Notifications**

The application property, `curam.ise.send.mdtmembers.notifications`, defines whether an email is sent to multidisciplinary team members when they are added or removed from a team. It also defines whether the team leader is notified when a member is added or removed from a team and when the team leader changes. The default value is `'YES'`. It is important for email addresses to be set up for all multidisciplinary team members to ensure that the notifications are issued correctly.

## **Configuring the MDT Portal**

This section describes the application properties available for configuring the information displayed in the MDT portal.

### **Configuring Time Period for Displaying Tasks on Portal Home Page**

The `curam.mdtexternal.numDaysTasksToDisplayWorkspaceHome` application property indicates the maximum number of days following the current date for which tasks that are assigned to the multidisciplinary team member are displayed on the member's portal home page. The default value is 7. Tasks will remain in the MDT portal for up to seven days after being assigned to a multidisciplinary team member.

### **Configuring Time Period for Displaying Meeting Invites on Portal Home Page**

The application property, `curam.mdtexternal.numDaysMeetingsToDisplayWorkspaceHome`, indicates the maximum number of days following the current date for which meetings the multidisciplinary team member is scheduled to attend are displayed on the member's portal home page. The default value for this is 7. Scheduled meetings will remain in the MDT portal for up to seven days after the multidisciplinary team member has been invited to attend.

### **Configuring Number of Meeting Minutes Displayed on Portal Home Page**

The application property, `curam.mdtexternal.numMeetingMinutesToDisplayWorkspaceHome`, indicates the maximum number of meeting minutes to display on an MDT member's portal home page. The default value for this is 5. The system retrieves all meeting minutes which have been issued to the MDT member and displays the first five retrieved.

### **Configuring Time Period for Displaying Tasks on My Tasks Page**

The application property, `curam.mdtexternal.numDaysTasksToDisplayMyTasks`, indicates the maximum number of days following the current date for which tasks assigned to the MDT member are displayed on the member's My Tasks page. The default value for this is 30. Tasks will remain on the MDT member's My Task page for up to thirty days after being assigned to the multidisciplinary team member.

## **(deprecated) Configuring Display of Affected Clients on Incidents**




The application property, `curam.mdtexternal.starUnmanagedClientsOnIncidents`, determines how affected clients on incidents are displayed. Since incidents can have more than one affected client,



there can be clients involved who are not actually managed by the multidisciplinary team (MDT) member. This property controls whether or not those clients are starred out so that MDT members can only see information about their own clients. The default value is *YES*; affected clients who are not managed by the MDT member will be starred out


## Configuring Discussions

### Introduction

**Note:**  Social Enterprise Folders (SEF) and Case Participant Index (CPI) are deprecated. For more information, see [Deprecated features](#)

This chapter describes the configuration options for discussions within social enterprise folders, collaborative outcome plans and collaborative investigations. Discussions are communication tools allowing caseworkers and multidisciplinary team members involved with a social enterprise folder, outcome plan and investigation to post comments or questions online.

### Configuring the Default Type of Discussion Moderator

**Note:**  Social Enterprise Folders (SEF) and Case Participant Index (CPI) are deprecated. For more information, see [Deprecated features](#)

The application property, `curam.ise.discussion.discussionsModerator`, is used to configure the default type of discussion moderator. The default value is `CASEOWNER`. This means that by default, the moderator of all discussions in a social enterprise folder, investigation or outcome plan is set to the caseowner. The default type can also be `CASESUPERVISOR`, `MDTLEADER`, or `USERDEFINED`. If the application property is set to `USERDEFINED`, then a user must be specified as the default moderator (see [“Specifying a User as the Default Moderator for Discussions”](#) on page 6).

When the default type is set to `CASEOWNER`, `CASESUPERVISOR`, or `MDTLEADER`, it is possible that more than one user can be assigned to these roles. To assign a single user to the role of discussion moderator, the processing steps described in the following table occur:

| Table 1: Process to Determine User Assigned to Role of Discussion Moderator |   |
|---|---|
| Default Type of Discussion Moderator  | Process to Determine User   |
| Caseowner   | If the caseowner of a social enterprise folder or investigation is a position, organization unit, or work queue, then the system assigns the role of discussion moderator to the supervisor of the social enterprise folder . The owner of an outcome plan can only be a user by default and so the system assigns the role of discussion moderator to the supervisor of the outcome plan. If there is more than one supervisor or no supervisor, then the discussion moderator is set to the system defined moderator. If there is no user assigned the role of system defined moderator, then the discussion moderator is set to the SYSTEM user. |

| Table 1: Process to Determine User Assigned to Role of Discussion Moderator (continued) |   |
|---|---|
| Default Type of Discussion Moderator  | Process to Determine User   |
| Supervisor  | If more than one user fills the role of supervisor or if there is no supervisor, then the discussion moderator is set to the system defined moderator. If there is no user assigned, the role of system defined moderator, then the discussion moderator is set to the SYSTEM user. |
| MDT Leader  | The MDT leader will be a user but if an MDT has not yet been assigned apply the following hierarchy: 1. Set the moderator to be the system defined moderator 2. If the system defined moderator is not set, set the SYSTEM user to be the moderator.                                |

## Specifying a User as the Default Moderator for Discussions

**Note:** Deprecated features

The application property, `curam.ise.discussion.userDefinedModerator`, is used in conjunction with the application property, `curam.ise.sef.discussionsModerator`, to specify a user as the default moderator for discussions on a SEF. For example, to specify a user named, JWilliams, as the default moderator, it is necessary to first set the `curam.ise.sef.discussionsModerator` to `USERDEFINED` and then `curam.ise.sef.userDefineModerator` can then be set to JWilliams.

## Configuring the Number of Comments Per Discussion Page

The application property, `curam.ise.discussion.commentsPerPage`, determines how many comments are shown per page in a paginated discussion. The default value is '5', such that each discussion page can hold up to a maximum of 5 comments.

## Providing Access to Discussion View Page in Email Notifications

The application property, `curam.discussion.viewURL`, provides access to the discussion view page in email notifications. It specifies the web address of the discussion view page, the default value of which is `Discussion_viewDiscussion`. Agencies can change the value of this application property to link to their own discussion view page.

## Providing Access to Stop Watching Discussions in Email Notifications

The application property, `curam.discussion.stopWatching`, provides access to the stop watching discussion page in email notifications. It specifies the web address of the stop watching discussion page, the default value of which is `Discussion_stopWatchingFromEmail`. Agencies can change the value of this application property to link to their own discussion view page.

## Emailing Discussion Watchers when Updates Occur

The application property, `curam.discussion.sendEmailNotifications`, specifies whether or not email notifications should be sent to discussion watchers when updates occur. The default is 'NO' such that discussion watchers are not emailed when updates occur.

## (deprecated) Configuring Transaction Histories



## (deprecated) Introduction



By default, a number of social enterprise folder (SEF) transactions have been configured to appear in the transaction log. To disable any of these transactions, thus removing them from the transaction log, it is necessary to create and configure application properties. This chapter provides sample application properties for disabling social enterprise folder transactions.

## (deprecated) Enabled SEF Transactions



This section describes the social enterprise transactions that have been configured to appear in the transaction log. Each social enterprise transaction is linked to a code in the `CaseTransactionEvents` codetable. These codes are used to create application properties to disable the transaction.

For example, the code for the 'Social Enterprise Folder Created' transaction, is SEFET97. The property name, therefore, should be `curam.config.transaction.disabled.SEFET97`. Samples for disabling social enterprise folder transactions are provided in [“Sample Application Properties for Disabling Transactions”](#) on page 14.

## (deprecated) SEF Status, Case, and Client Transactions



The following table describes transaction types that have been enabled in relation to social enterprise folder statuses, cases, and clients:

| Table 2: Transaction Types for Social Enterprise Folder Statuses, Cases, and Clients |  |  |          |
|--|--|--|----------|
| Transaction Type   | Transaction Description  | Transaction Example  | Code     |
| Social Enterprise Folder Created   | <SEF Type> - <caseID> created  | Child Welfare - 257 created  | SEFET97  |
| Social Enterprise Folder Closed  | <SEF Type> - <caseID> closed   | Child Welfare - 257 closed   | SEFET98  |
| Social Enterprise Folder Reopened  | <SEF Type> - <caseID> reopened   | Child Welfare - 257 reopened   | SEFET99  |
| Case Added to Social Enterprise Folder   | <Case Type> - <caseID> added to <SEF Type> - <caseID>                                    | Food Stamps - 266 added to Child Welfare - 257                         | SEFET102 |
| Case Removed from Social Enterprise Folder   | <Case Type> - <caseID> removed from <SEF Type> - <caseID>                                | Food Stamps - 266 removed from Child Welfare - 257                     | SEFET103 |
| Client Added to Social Enterprise Folder   | <Participant Name> added to <SEF Type> - <caseID>  | John Smith added to Child Welfare - 257                                | SEFET100 |
| Client Removed from Social Enterprise Folder   | <Participant Name> removed from <SEF Type> - <caseID>                                    | John Smith removed from Child Welfare - 257                            | SEFET101 |
| Social Enterprise Folder Relationship Created  | Social Enterprise Folder Relationship with <related SEF Type> - <related caseID> created | Social Enterprise Folder Relationship with Child Welfare - 257 created | SEFET111 |

| <i>Table 2: Transaction Types for Social Enterprise Folder Statuses, Cases, and Clients (continued)</i> |   |   |          |
|---|---|---|----------|
| Transaction Type  | Transaction Description   | Transaction Example   | Code     |
| Social Enterprise Folder Relationship Modified  | Social Enterprise Folder Relationship with <related SEF Type> - <related caseID> modified | Social Enterprise Folder Relationship with Child Welfare - 257 modified | SEFET112 |
| Social Enterprise Folder Relationship Deleted   | Social Enterprise Folder Relationship with <related SEF Type> - <related caseID> deleted  | Social Enterprise Folder Relationship with Child Welfare - 257 deleted  | SEFET113 |

### **(deprecated) Multidisciplinary Team and Team Member Transactions**



The following table describes transaction types that have been enabled in relation to multidisciplinary teams and team members:

| <i>Table 3: Transaction Types for Multidisciplinary Teams and Team Members</i> |  |   |          |
|--|--|---|----------|
| Transaction Type   | Transaction Description  | Transaction Example   | Code     |
| Multidisciplinary Team Added   | <Multidisciplinary Team Name> added to <SEF Type> - <caseID>     | Multidisciplinary Team added to Child Welfare - 257 (for predefined MDTs, this will include the MDT name)     | SEFET109 |
| Multidisciplinary Team Removed   | <Multidisciplinary Team Name> removed from <SEF Type> - <caseID> | Multidisciplinary Team removed from Child Welfare - 257 (for predefined MDTs, this will include the MDT name) | SEFET110 |
| Multidisciplinary Team Member Added  | <MDT Member Name> added to <SEF Type> - <caseID>                 | Dr. Linda Chang added to Child Welfare - 257  | SEFET107 |
| Multidisciplinary Team Member Removed  | <MDT Member Name> removed from <SEF Type> - <caseID>             | Dr. Linda Chang removed from to Child Welfare - 257   | SEFET108 |

**Note:** Sample application properties for disabling the multidisciplinary team and team member transactions are provided in [“Sample Application Properties for Disabling Transactions”](#) on page 14.

### **Meeting and Meeting Minute Transactions**

The following table describes transaction types that have been enabled in relation to meetings and meeting minutes:

*Table 4: Transaction Types for Meetings and Meeting Minutes*

| <b>Transaction Type</b>  | <b>Transaction Description</b>  | <b>Transaction Example</b>   | <b>Code</b> |
|--------------------------|---|--|-------------|
| Meeting Created          | <Meeting Subject><br>meeting scheduled<br><start date> at <start time> created                        | Review SEF Cases<br>meeting scheduled for<br>12/12/2007 at 13:15<br>created        | SEFET117    |
| Meeting Modified         | <Meeting Subject><br>meeting scheduled<br><start date> at <start time> modified                       | Review SEF Cases<br>meeting scheduled for<br>12/12/2007 at 13:15<br>modified       | SEFET118    |
| Meeting Deleted          | <Meeting Subject><br>meeting scheduled<br><start date> at <start time> deleted                        | Review SEF Cases<br>meeting scheduled for<br>12/12/2007 at 13:15<br>deleted        | SEFET119    |
| Meeting Minutes Created  | Minutes created for<br><Meeting Minutes Subject> meeting held on <start date> at <start time>         | Minutes created for<br>Review SEF Cases<br>meeting held on<br>12/12/2007 at 13:15  | SEFET114    |
| Meeting Minutes Modified | Minutes modified for<br><Meeting Minutes Subject> meeting held on <start date> at <start time>        | Minutes modified for<br>Review SEF Cases<br>meeting held on<br>12/12/2007 at 13:15 | SEFET115    |
| Meeting Minutes Deleted  | Minutes deleted for<br><Meeting Minutes Subject> meeting held on <start date> at <start time> created | Minutes deleted for<br>Review SEF Cases<br>meeting held on<br>12/12/2007 at 13:15  | SEFET116    |

### **Discussion Transactions**

The following table describes transaction types that have been enabled in relation to discussions:

*Table 5: Transaction Types for Discussions*

| <b>Transaction Type</b> | <b>Transaction Description</b>   | <b>Transaction Example</b>   | <b>Code</b> |
|-------------------------|--|--|-------------|
| Discussion Created      | <Discussion Subject><br>discussion posted by<br><Posted By User> on<br><Posted Date> at<br><Posted Time>   | Emergency Benefits<br>discussion posted by<br>CASEWORKER on<br>12/12/2007 at 13:15   | SEFET127    |
| Discussion Modified     | <Discussion Subject><br>discussion modified by<br><Posted By User> on<br><Posted Date> at<br><Posted Time> | Emergency Benefits<br>discussion modified by<br>CASEWORKER on<br>12/12/2007 at 15:15 | SEFET128    |

| <i>Table 5: Transaction Types for Discussions (continued)</i> |  |   |             |
|---|--|---|-------------|
| <b>Transaction Type</b>                                       | <b>Transaction Description</b>   | <b>Transaction Example</b>  | <b>Code</b> |
| Discussion Deleted  | <Discussion Subject><br>discussion deleted by<br><Posted By User> on<br><Posted Date> at<br><Posted Time>                | Emergency Benefits<br>discussion deleted by<br>CASEWORKER on<br>12/12/2007 at 17:15             | SEFET129    |
| Discussion Comment<br>Created                                 | Comment added to<br><Discussion Subject><br>discussion by <Posted<br>By User> on <Posted<br>Date> at <Posted Time>       | Comment added to<br>Emergency Benefits<br>discussion by<br>CASEWORKER on<br>12/12/2007 at 13:15 | SEFET137    |
| Discussion Comment<br>Modified                                | Comment on<br><Discussion Subject><br>discussion modified by<br><Edited By User> on<br><Edited Date> at<br><Edited Time> | Comment on Emergency<br>Benefits discussion<br>modified by SUPERUSER<br>on 12/12/2007 at 15:15  | SEFET138    |
| Discussion Comment<br>Deleted                                 | Comment on<br><Discussion Subject><br>discussion deleted by<br><Edited By User> on<br><Edited Date> at<br><Edited Time>  | Comment on Emergency<br>Benefits discussion<br>deleted by SUPERUSER<br>on 12/12/2007 at 17:15   | SEFET139    |

**Important:** There are three application properties controlling the display of discussion comment transactions: `curam.config.transaction.disabled.SEFET137`, `curam.config.transaction.disabled.SEFET138`, and `curam.config.transaction.disabled.SEFET139`. By default, these properties are set to 'YES' such that discussion comment transactions will not appear in transaction histories.

### Communication Transactions

The following table describes transaction types that have been enabled in relation to communications:

| <i>Table 6: Transaction Types for Communications</i>                   |   |   |   |
|--|---|---|---|
| <b>Transaction Type</b>  | <b>Transaction Description</b>  | <b>Transaction Example</b>  | <b>Code(s)</b>  |
| Communications<br>Inserted   | <Communication Type><br>communication created<br>for correspondent<br><Correspondent Name>      | Email created for<br>correspondent James<br>Smith                           | ET49 for emails   |
| Communications<br>Modified (Recorded<br>Communications and<br>Emails)  | <Communication Type><br>communication modified<br>for correspondent<br><Correspondent Name>     | Email communication<br>modified for<br>correspondent James<br>Smith         | ET47 for recorded<br>communications, ET50<br>for emails |
| Communications<br>Cancelled (Recorded<br>Communications and<br>Emails) | <Communication Type><br>communication<br>cancelled for<br>correspondent<br><Correspondent Name> | Hard copy<br>communication<br>cancelled for<br>correspondent James<br>Smith | ET48 for recorded<br>communications, ET51<br>for emails |

*Table 6: Transaction Types for Communications (continued)*

| <b>Transaction Type</b>                     | <b>Transaction Description</b>   | <b>Transaction Example</b>   | <b>Code(s)</b>  |
|---|--|--|-----------------|
| Communication Sent                          | <Communication Type><br>communication for<br>correspondent<br><Correspondent Name><br>sent | Email Communication<br>for correspondent<br>James Smith sent                     | ET94 for emails |
| Pro Forma<br>Communication<br>Inserted      | <Pro Forma Type><br>created for<br>correspondent<br><Correspondent Name>                   | Case Closure Client<br>Notification created for<br>correspondent James<br>Smith  | ET52            |
| Pro Forma<br>Communication<br>Changed       | <Pro Forma Type><br>modified for<br>correspondent<br><Correspondent Name>                  | Case Closure Client<br>Notification modified for<br>correspondent James<br>Smith | ET53            |
| Pro Forma<br>Communication<br>Cancelled     | <Pro Forma Type><br>cancelled for<br>correspondent<br><Correspondent Name>                 | Case Closure Client<br>Notification modified for<br>correspondent James<br>Smith | ET54            |
| Pro Forma<br>Communication Sent             | <Pro Forma Type> for<br>correspondent<br><Correspondent Name><br>sent                      | Case Closure Client<br>Notification for<br>correspondent James<br>Smith sent     | ET95            |
| Word Document<br>Communication<br>Inserted  | <Template Name><br>created for<br>correspondent<br><Correspondent Name>                    | Meeting Request<br>created for<br>correspondent James<br>Smith                   | ET55            |
| Word Document<br>Communication<br>Changed   | <Template Name><br>modified for<br>correspondent<br><Correspondent Name>                   | Meeting Request<br>modified for<br>correspondent James<br>Smith                  | ET56            |
| Word Document<br>Communication<br>Cancelled | <Template Name><br>cancelled for<br>correspondent<br><Correspondent Name>                  | Meeting Request<br>cancelled for<br>correspondent James<br>Smith                 | ET57            |
| Word Document<br>Communication Sent         | <Template Name> for<br>correspondent<br><Correspondent Name><br>sent                       | Meeting Request for<br>correspondent James<br>Smith sent                         | ET96            |
| Notes Inserted                              | User note created by<br><UserName> on<br><creationDate>                                    | User note created by<br>SUPERUSER on<br>17/01/2008                               | ET68            |
| Notes Modified                              | User note modified by<br><UserName> on<br><updateDate>                                     | User note modified by<br>SUPERUSER on<br>17/01/2008                              | ET69            |
| Notes Deleted                               | User note deleted by<br><UserName> on<br><deletionDate>                                    | User note deleted by<br>SUPERUSER on<br>17/01/2008                               | ET70            |

## Attachment Transactions

The following table describes transaction types that have been enabled in relation to attachments:

| <i>Table 7: Transaction Types for Attachments</i> |  |   |          |
|---|--|---|----------|
| Transaction Type                                  | Transaction Description  | Transaction Example   | Code     |
| Attachment Added                                  | <File Name or Reference> file added to <SEF Type> - <caseID>   | Medical Report file added to Child Welfare - 257  | SEFET120 |
| Attachment Modified                               | <File Name or Reference> file modified on <SEF Type> - <caseID>  | Medical Report file modified on Child Welfare - 257                                       | SEFET121 |
| Attachment Deleted                                | <File Name or Reference> file deleted from <SEF Type> - <caseID>   | Medical Report file deleted from Child Welfare - 257                                      | SEFET122 |
| File Added to Incident                            | <File Name or Reference> file added to Suspected Abuse incident affecting <Client Name>                    | Medical Report file added to Suspected Abuse incident affecting James Smith               | SEFET130 |
| File Modified on Incident                         | <File Name or Reference> file modified on Suspected Abuse incident affecting <Client Name>                 | Medical Report file modified on Suspected Abuse incident affecting James Smith            | SEFET131 |
| File Deleted from Incident                        | <File Name or Reference> file deleted from Suspected Abuse incident affecting <Client Name>                | Medical Report file deleted from Suspected Abuse incident affecting James Smith           | SEFET132 |
| File Added to Discussion                          | <File Name or Reference> file added to <Discussion Subject> discussion                                     | Medical Report file added to Emergency Benefits discussion                                | SEFET123 |
| File Deleted from Discussion                      | <File Name or Reference> deleted from <Discussion Subject> discussion                                      | Medical Report file deleted from Emergency Benefits discussion                            | SEFET124 |
| File Added to Discussion Post                     | <File Name or Reference> file added to <Discussion Subject> discussion posting on <posting date> at <time> | Medical Report file added to Emergency Benefits discussion posting on 25/02/2008 at 15:10 | SEFET125 |



Table 7: Transaction Types for Attachments (continued)

| Transaction Type                  | Transaction Description   | Transaction Example   | Code     |
|-----------------------------------|---|---|----------|
| File Deleted from Discussion Post | <File Name or Reference> file deleted from <Discussion Subject> discussion posting on <posting date> at <time>            | Medical Report file deleted from Emergency Benefits discussion posting on 25/02/2008 at 15:10             | SEFET126 |
| File Added to Meeting Minutes     | <File Name or Reference> file added to <Minutes Subject> minutes for meeting held on <start date> at <start time>         | Medical Report file added to the MDT Review minutes for meeting held on 12/12/2007 at 13:15               | SEFET134 |
| File Modified on Meeting Minutes  | <File Name or Reference> file modified on <Minutes Subject> minutes for meeting held on <start date> at <start time>      | Medical Report file modified on the MDT Review minutes for meeting held on 12/12/2007 at 13:15            | SEFET135 |
| File Deleted from Meeting Minutes | <File Name or Reference> file deleted from <Minutes Subject> minutes for meeting held on <start date> at <start time>     | Medical Report file deleted from the MDT Review minutes for meeting held on 12/12/2007 at 13:15           | SEFET136 |
| Meeting Minutes Issued            | Minutes issued to <Invitee Name, Invitee Name> for <Meeting Minutes Subject> meeting held on <start date> at <start time> | Minutes issued to John Smith, Dr. Jessica Change for Review SEF Cases meeting held on 12/12/2007 at 13:15 | SEFET133 |
| File Added to Communication       | <File Name or Reference> file added to <Communication Method> communication for correspondent <Correspondent Name>        | Medical Report file added to Hard Copy communication for correspondent James Smith                        | ET97     |
| File Modified on Communication    | <File Name or Reference> file modified on <Communication Method> communication for correspondent <Correspondent Name>     | Medical Report file modified on Hard Copy communication for correspondent James Smith                     | ET98     |

| Table 7: Transaction Types for Attachments (continued) |  |  |      |
|--|--|--|------|
| Transaction Type                                       | Transaction Description  | Transaction Example  | Code |
| File Deleted from Communication                        | <File Name or Reference> file deleted from <Communication Method> communication for correspondent <Correspondent Name> | Medical Report file deleted from Hard Copy communication for correspondent James Smith | ET99 |

## (deprecated) Adding Application Properties to Disable SEF Transactions



With the exception of discussion comments, all social enterprise folder (SEF) transactions are enabled by default. Application properties must be added and set to disable these transactions.

The steps to do this are as follows:

1. Log in as system administration.
2. Link to the **Properties** page.
3. Select the **Add Property** option.
4. Enter the property details. For help on completing these details, see [“Sample Application Properties for Disabling Transactions” on page 14.](#)
5. Save the new property.
6. Select the **Publish Changes** option.
7. Confirm the publication of the property information.

## Sample Application Properties for Disabling Transactions

This section provides sample application properties for disabling the multidisciplinary team and team member transactions described in [“\(deprecated\) Multidisciplinary Team and Team Member Transactions” on page 8.](#)

### (deprecated) Disabling the 'Multidisciplinary Team Added' Transaction



The application property for disabling the **Multidisciplinary Team Added** transaction can include the following sample values:

| Table 8: Sample Application Property for Disabling <b>Multidisciplinary Team Added</b> Transaction |   |
|--|---|
| Field on Add Property Page   | Sample Value                                |
| Property Name  | curam.config.transaction.disable.SEFET109   |
| Value  | YES   |
| Category   | Application - Case Transaction Log settings |
| Type   | String Type                                 |
| Dynamic  | Yes   |
| Default Value  | (Not required)                              |
| Locale   | English, Spanish, etc.                      |
| Display Name   | curam.config.transaction.disable.SETET109   |

Table 8: Sample Application Property for Disabling **Multidisciplinary Team Added** Transaction (continued)

| Field on Add Property Page | Sample Value   |
|----------------------------|--|
| Description                | Whether to disable the 'Multidisciplinary Team Added' transaction. If this is set to YES, a transaction will not be recorded when a multidisciplinary team is added to the social enterprise folder (SEF). |

#### (deprecated) Disabling the 'Multidisciplinary Team Removed' Transaction



The application property for disabling the **Multidisciplinary Team Removed** transaction can include the following sample values:

Table 9: Sample Application Property for Disabling **Multidisciplinary Team Removed** Transaction

| Field on Add Property Page | Sample Value   |
|----------------------------|--|
| Property Name              | curam.config.transaction.disable.SEFET110  |
| Value                      | YES  |
| Category                   | Application - Case Transaction Log settings  |
| Type                       | String Type  |
| Dynamic                    | Yes  |
| Default Value              | (Not required)   |
| Locale                     | English, Spanish, etc.   |
| Display Name               | curam.config.transaction.disable.SETET110  |
| Description                | Whether to disable the 'Multidisciplinary Team Removed' transaction. If this is set to YES, a transaction will not be recorded when a multidisciplinary team is removed from the social enterprise folder. |

#### Disabling the Multidisciplinary Team Member Added Transaction

The application property for disabling the **Multidisciplinary Team Member Added** transaction can include the following sample values:

Table 10: Sample Application Property for Disabling **Multidisciplinary Team Member Added** Transaction

| Field on Add Property Page | Sample Value                                |
|----------------------------|---|
| Property Name              | curam.config.transaction.disable.SEFET107   |
| Value                      | YES   |
| Category                   | Application - Case Transaction Log settings |
| Type                       | String Type                                 |
| Dynamic                    | Yes   |
| Default Value              | (Not required)                              |

Table 10: Sample Application Property for Disabling **Multidisciplinary Team Member Added** Transaction (continued)

| Field on Add Property Page | Sample Value   |
|----------------------------|--|
| Locale                     | English, Spanish, etc.   |
| Display Name               | curam.config.transaction.disable.SETET107  |
| Description                | Whether to disable the 'Multidisciplinary Team Member Added' transaction. If this is set to YES, a transaction will not be recorded when a multidisciplinary team member is added to the social enterprise folder. |

### (deprecated) Disabling the Multidisciplinary Team Member Removed Transaction



The application property for disabling the **Multidisciplinary Team Member Removed** transaction can include the following sample values:

Table 11: Sample Application Property for Disabling **Multidisciplinary Team Member Removed** Transaction

| Field on Add Property Page | Sample Value   |
|----------------------------|--|
| Property Name              | curam.config.transaction.disabled.SEFET108   |
| Value                      | YES  |
| Category                   | Application - Case Transaction Log settings  |
| Type                       | String Type  |
| Dynamic                    | Yes  |
| Default Value              | (Not required)   |
| Locale                     | English, Spanish, etc.   |
| Display Name               | curam.config.transaction.disable.SETET108  |
| Description                | Whether to disable the 'Multidisciplinary Team Member Removed' transaction. If this is set to YES, a transaction will not be recorded when a multidisciplinary team member is removed from the social enterprise folder (SEF). |

## Conclusion

### Summary of SEF and MDT Configuration Options

**Note:** Social Enterprise Folders (SEF) and Case Participant Index (CPI) are deprecated. For more information, see [Deprecated features](#)

The following table provides a summary of the social enterprise folder and multidisciplinary team application properties.

*Table 12: Summary of SEF and MDT Application Properties*

| <b>Application Property</b>   | <b>Summary</b>   |
|---|--|
| (deprecated) curam.ise.sef.casetypes.allowall                         | This indicates whether or not all case types are supported in social enterprise folders. The default is 'NO'.  |
| (deprecated) curam.ise.sef.casetypes                                  | This indicates the specific case types that are supported in social enterprise folders. The default is 'CT2,CT5', the codes for product delivery and integrated case types.  |
| (deprecated)<br>curam.ise.sef.client.createrelationship               | This is used to configure automatic creation of social enterprise folder relationships when new clients are added to a social enterprise folder. The default value is 'YES'.   |
| curam.ise.send.mdtmembers.notifications                               | This indicates whether or not to send notifications to multidisciplinary team members, for example, when a member is invited to a meeting. The default value is 'YES'.   |
| curam.mdtexternal.numDaysTasksToDisplay<br>WorkspaceHome              | This indicates the maximum number of days following the current date for which tasks assigned to the multidisciplinary team member are displayed on the member's portal home page. The default value for this is 7.      |
| curam.mdtexternal.numDaysMeetingsTo<br>DisplayWorkspaceHome           | This indicates the maximum number of days following the current date for which meetings the multidisciplinary team member is scheduled to attend are displayed on the member's portal home page. The default value is 7. |
| curam.mdtexternal.numMeetingMinutesTo<br>DisplayWorkspaceHome         | This indicates the maximum number of meeting minutes to display on an MDT member's portal home page. The default value is 5.   |
| curam.mdtexternal.numDaysTasksTo<br>DisplayMyTasks                    | This indicates the maximum number of days following the current date for which tasks assigned to the MDT member are displayed on the member's My Tasks page. The default value is 30.                                    |
| (deprecated)<br>curam.mdtexternal.starUnmanagedClients<br>OnIncidents | This property controls whether or not those clients are starred out so that MDT members can only see information about their own clients. The default value is 'YES'.  |

## Summary of Discussion Configuration Options

The following table provides a summary of the discussion application properties.

Table 13: Summary of Discussion Application Properties

| Application Property                    | Summary  |
|---|--|
| curam.ise.sef.userDefinedModerator      | This is used to configure the default type of discussion moderator. The default value is CASEOWNER which means that the moderator of all discussions in a social enterprise folder, outcome plan and investigation is the caseowner. If this property is set to USERDEFINED, then the username must be configured in the next application property, curam.ise.sef.discussionsModerator . |
| curam.ise.sef.discussionsModerator      | This is used to specify a user at the default moderator for discussions on outcome plan and investigation. It is set in conjunction with the above application property, curam.ise.sef.userDefinedModerator , when set to USERDEFINED.   |
| curam.ise.discussion.paginate           | This determines whether or not discussions will be paginated. The default is 'YES'.  |
| curam.ise.discussion.commentsPerPage    | This determines how many comments to show per page on the paginated discussions widget. The default is '5'.  |
| curam.ise.discussion.viewURL            | This specifies the address of Discussion view page. It is used when sending links to Cúram pages in email notifications. The default is Discussion_viewDiscussion.   |
| curam.discussion.stopWatching           | This specifies the address of stop watching discussion page. It is used when sending links to Cúram pages in email notifications. The default is Discussion_stopWatchingFromEmail.   |
| curam.discussion.sendEmailNotifications | This specifies whether or not email notifications should be sent to watchers when discussion updates occur. The default is NO.   |

## Compliance

### Introduction

This appendix explains how to develop in a compliant manner. By following these considerations, customers will also find it easier to upgrade to future versions of Cúram.

### Public API

Social Enterprise Collaboration has a public API which you may use in your application code. This public API will not have any components changed or removed without following Cúram standards for handling customer impact.

### Identifying the API

The JavaDoc shipped is the sole means of identifying which public classes, interfaces and methods form the public API.

## Outside the API

Social Enterprise Collaboration also contains some public classes, interfaces and methods, which do not form part of the API.

**Important:** To be compliant, dependencies on any class or interface should not be made. No methods should be called other than those described in the JavaDoc.

Classes, interfaces and methods outside of the public API are subject to change or removal without notice. Unless otherwise stated in the JavaDoc, you must not place any of your own classes or interfaces in the same package as that of the Social Enterprise Collaboration component.

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