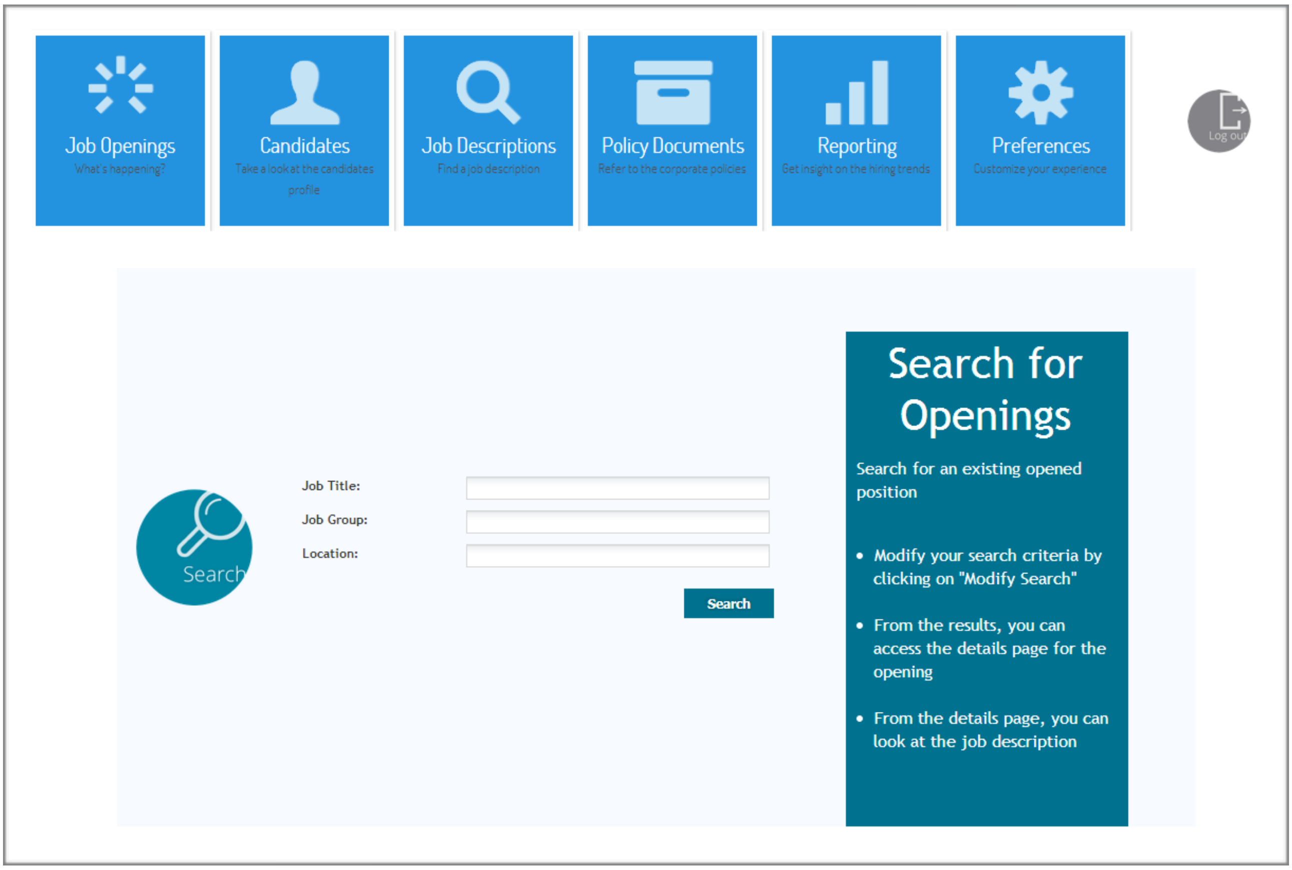
WorkSpace

xCP 2.1 Sample Application

Deployment Guide



Abstract

Outline of the deployment steps and demonstration scenario for the WorkSpace sample application.

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Executive Summary

The WorkSpace sample application demonstrates many of the new features of xCP 2.1 in the context of an HR on boarding application. Users of the system can manage job opening information along with the related job description documents, as well as the candidates that are applying for those jobs. A business process is then used to manage the interview process, gathering feedback from one or more interviewers before allowing the candidate to be hired if appropriate.

The purpose of this guide is not to provide a comprehensive user manual to the application, but rather to outline the steps needed to deploy it to your own environment and to deliver a short demonstration scenario that you can follow to get you started.

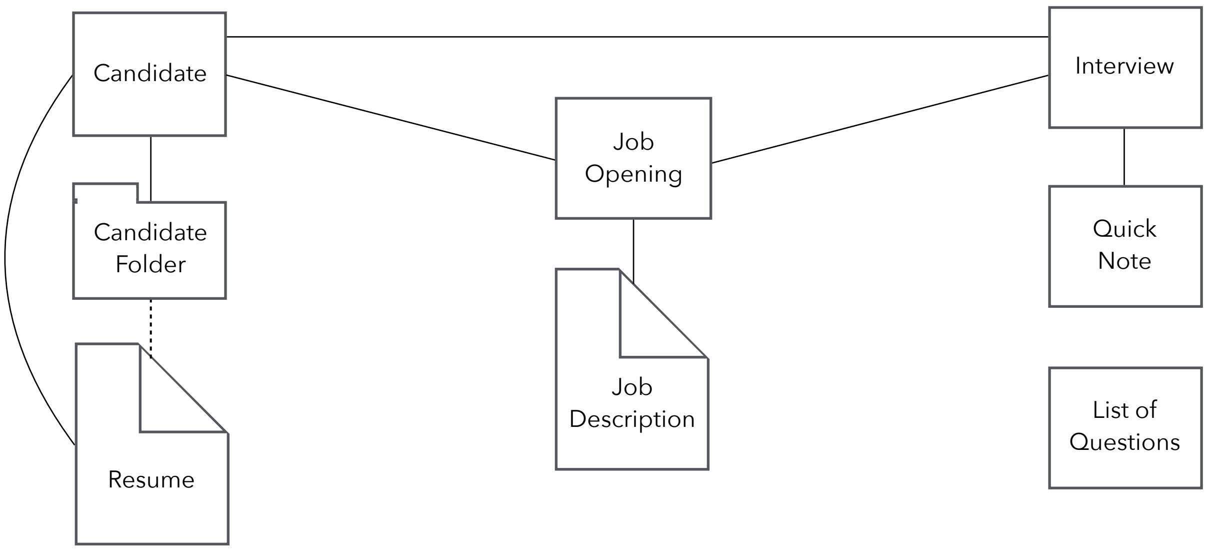
Audience

This document is intended for those wishing to install and demonstrate the sample application.

Introduction

The WorkSpace sample application demonstrates how xCP 2.1 can be used to build a modern looking, intuitive, configurable application. Many aspects of the runtime look and feel (such as navigation mode) can be set by the user, with their settings beings stored in a cookie across session.

The data model for the application is shown below. Most items are modelled as Business Objects, and extensive use is made of relationships between each object (the relationship between the Candidate Folder and Resume is an implicit one).



The application allows users to manage Candidates and Job Openings, assigning candidates as applicants to an opening and then scheduling Interviews with other users. When an interview is initiated, a pre-defined List of Questions can be selected which are converted to a Quick Note object. The Quick Note provides an editable document that can be used for reference and to capture notes during the interview. Finally a decision can be made to hire a candidate, which shows how a series of actions can be chained together and the progress of those actions monitored.

In addition to these capabilities, the navigation provides access to several 'placeholder' pages, which can be used to provide your own reports, help and other functionality that you may wish to add.

Application Deployment

The xCelerator has been packaged with the use of the Deployment xCelerator to simplify the setup of required cabinets and folders as well as a sample configuration. The deployment utility also sets up some sample users and content so that you can begin demonstrating the solution very quickly.

It is essential that you follow the instructions for deployment carefully otherwise aspects of the application may not function as described.

Deployment consists of three steps:

1. Pre-deployment setup that configures the repository with the correct cabinet and folder structure. The xCP application is configured with some folder parameters whose target path must exist in the repository before the application can be deployed.
2. Import of the application into xCP Designer and deployment via xMS
3. Post-deployment setup that sets up some sample artifacts in the repository such as a list of questions, and creates some demonstration users in the application role for demonstration purposes.

Prerequisites

The application has been configured against the Patch 03 build of xCP 2.1 and has only been tested with that build.

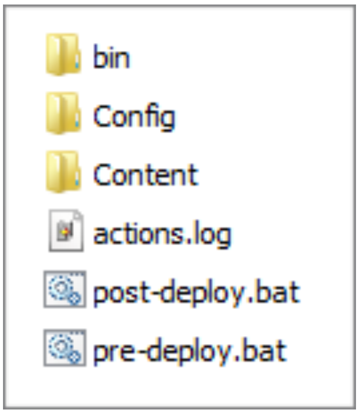
Download the *WorkSpace Release 1.0.0.zip* package which contains two other zip files (*WorkSpace 1.0.0 Deployment Utility.zip* and *WorkSpace 1.0.0 xCP Application.zip*). The packages contains the xCP application to be imported into Designer and the Deployment Utility xCelerator pre-configured for this application.

Ensure that the key xCP 2.1 services are running. This includes the Content Server, xMS Server, BAM Server, xPlore and the Application Server services that host the supporting applications such as Process Integrator and your xCP applications. Note that the CTS and CIS services are not required for deployment or the application but CTS is required for execution of it.

Repository Configuration

The first step is to use the deployment tool to configure the repository. It is recommended that you run the deployment utility from the Content Server machine. Before executing the deployment utility scripts you will need to edit them to reflect your paths, docbase names etc.

Unzip the deployment utility on the Content Server machine and open the folder.



The bin directory contains the libraries needed by the utility as well as the environment configuration file. The Config directory contains one or more XML files that contain the definitions of the artifacts to configure in the target repository. More details about the structure of the XML file can be found in the deployment utility documentation. The Content folder contains files that will be imported into the repository.

Start by updating the file `/bin/dfc.properties` with the settings for your environment.

Then update the file `/Config/pre-deploy.xml` and change the repository connection information in the root element:

```
<xcpapplication docbase="corp" username="dmadmin" password="demo.demo"
date_format="dd/mm/yyyy hh:mi:ss">
```

Finally run the batch file `pre-deploy.bat` and check the progress in the file `actions.log`. If there are any errors reported then fix them before proceeding.

xCP Application

The next step is to import the xCP application into xCP Designer. Information on how to do this is provided in the xCP Designer Help.

When importing, if you receive an error about incompatible libraries then you will need to update the execution environment reference in the manifest file inside the libraries `dtb.DemoToolbox-2.1.0.jar`, `eztheme.EZTheme-2.1.0.jar` and `xfn.xTensionFunctions-2.1.1.jar` in the `\lib` folder. You do **not** need to update the library `JavaServiceRichText.jar`.

Once you have imported the application you will need to update the Repository Endpoint to reflect your environment settings.

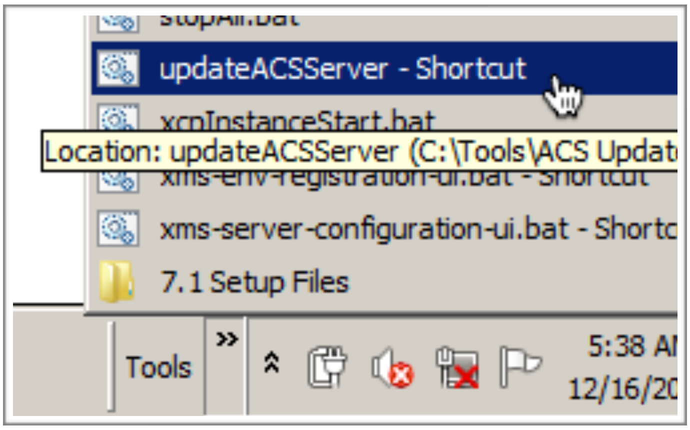
Finally configure a Runtime Environment from Preferences and deploy the application.

Post Deployment Configuration

The final deployment step is to set up some sample users and object using the deployment tool again. Start by updating the file `/Config/post-deploy.xml` and change the repository connection information as before. Then run the batch file `post-deploy.bat`, again checking the output in the the file `actions.log`. If execution of this batch file fails then the most likely cause is that the Repository Endpoint in the xCP application was not updated prior to deployment.

ACS Server

If the viewer is not working in the client, then the most likely cause is that the ACS server URL is incorrect. You need to use Documentum Administrator to change the value. If you are using one of the generic developer virtual machines you should have a utility for updating it automatically. From the Tools link on the Start Bar run the batch file to update the URL. Once you have done that restart the xCPInstance tcServer.

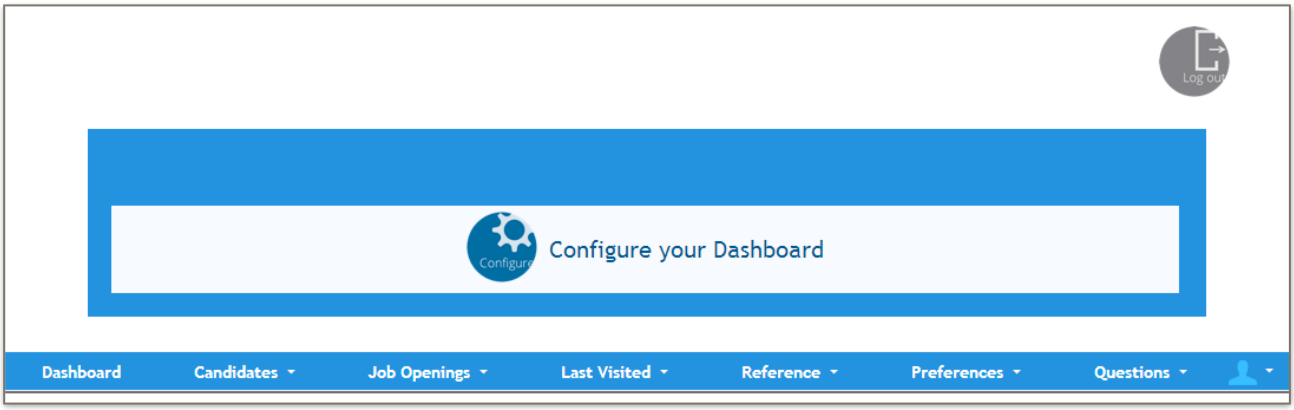


Sample Content

In the `/Content` folder of the deployment utility are some sample documents (resume and job description) that can be used for the demonstration scenario.

Configuring Initial User Preferences

When you first log on the application, or after you clear the browser cache, none of the session parameters that are stored in cookies will be set, and so you will be presented with the default view as shown here.



By default the traditional xCP navigation bar is shown for quick access to pages when modifying the application. The only system features that have to be accessed from this xCP navigation bar are those for the management of lists of questions, and to access your user settings page so that you can enable the client plug-in.

Although you can click on the **Configure your Dashboard** icon to set up the dashboard layout from here, it is recommended that you start by choosing **Preferences > Set defaults** from the menu and click the **Restore** button to configure the initial settings.

These default settings use the tiles navigation paradigm, whereby every page has this icon which you can click to take you to the tiles page. If you are working with a small screen resolution the tiles page will scroll left and right. The default dashboard shows a list of interview tasks and a drill-down chart showing the decisions you made in each interview.

Demo Scenario Configuration

Application Roles

The following table outlines the application roles and the users that are pre-created in those roles. All users have a lowercase login name and all passwords are `demo.demo`.

Role	Description	Users
WorkSpace User	These users create job offers, set up candidates in the system, schedule interviews and complete the hiring process.	Adam, Barbara, Betty, Bob, Rita

Demonstration Steps

The following steps outline a simple demonstration scenario that covers each area of the application. Because there are multiple navigation options, screenshots are not provided. When logging in, use the lowercase format for each user (i.e. *betty* not *Betty*).

Create Job Offer

Step	User	Actions
1	Betty	Log on and navigate to the *Create a new Job Opening* page.
2	Betty	Enter the details for the job opening.
3	Betty	Click the **Create** button to finish creating the job opening. The *View Job Opening* page for the opening loads automatically.
4	Betty	If you want to you can make changes to the details by clicking the **Edit** button, making the changes and then clicking the **Save** button.
4	Betty	Select the **Job Description** tab and click the **Upload Job Description** button.
5	Betty	Click the **Add** button (a green plus icon) and select a file (you can use the sample job description provided or your own). Select the appropriate **Format**, enter a value for the Reference and click the **Finish** button to import the job description and relate it to the job opening. If you want to change it you can simply repeat this process to replace the existing one.
6	Betty	Instead of uploading a new job description you can also click the **Select Job Description** button which then allows you to see the list of job descriptions already in the system that are not yet associated with a job offer, so that you can preview them and select one. In order to import job descriptions like this you need to add the job description component to your dashboard and then you can drag and drop one or more
7	Betty	Click the **Preview** icon (an eye) in the results list to see a preview of the resume. You may need to scroll right to see the icon. You will also need to wait for CTS to render the document before you can do this.
8	Betty	Right-click on the job description to bring up the context menu and select **Edit Content** from the menu. The document will be checked out and downloaded for editing. The result list should update to show a lock icon next to the preview icon (in place of the version history icon).
9	Betty	Edit the document, save the changes and close it.
10	Betty	Right-click on the job description again and this time choose **Import New Version** from the context menu. If you are not using the client plugin-in you will need to click the **Add** button and select the file. Select the type of **Version** to create and click the **Finish** button.

Step	User	Actions
11	Betty	Click the **Version History** icon to see a list of the versions of the document. From here you can click on the hyperlink to download a specific version of the document.

Create Candidate

Step	User	Actions
1	Betty	Navigate to the *Create new Candidate* page.
2	Betty	Enter the details for the candidate, leaving their email address empty.
3	Betty	Click the **Create** button to finish creating the candidate. The *View Candidate* page for the candidate loads automatically.
4	Betty	Click the **Update Details** button and update the **Date of Birth**. Click the **Finish** button to save the change.
5	Betty	Select the **Resume** tab and click the **Add Resume** button.
6	Betty	Click the **Add** button and select a file (you can use the sample resume provided or your own). Select the appropriate **Format** and click the **Finish** button to import the resume and relate it to the candidate. If you want to change it you can simply repeat this process to replace the existing one.
7	Betty	Click the **Preview** icon in the results list to see a preview of the resume.

Create New Application

Step	User	Actions
1	Betty	From the *View Candidate* page select the **Applications** tab.
2	Betty	Click the **New Application** button to assign the candidate as an applicant for a job opening.
3	Betty	Enter any search criteria and click the **Search** button to locate the job opening.
4	Betty	Select a job opening from the list and click the **Finish** button to relate the candidate as an applicant.
5	Betty	The list of applications is refreshed to show the new selection.

Schedule Interviews

Step	User	Actions
1	Betty	From the *View Candidate* page select the **Applications** tab.
2	Betty	Click on one of the listed job openings (the row to the right of the hyperlink) to see the interviews for that job opening. If you click on the hyperlink you will be taken to the *View Job Opening* page instead.
3	Betty	Click the **New Interview** button to schedule a new interview.
4	Betty	First select *Adam* as the **Interviewer** and a future **Start time** for the interview. Click the **Next** button.
5	Betty	Next decide if you want to use a pre-defined list of questions for the interview or not by selecting either **Yes** or **No** from the radio buttons. If you selected **No** jump to step 8.
6	Betty	Click the Next button and select a value for the **Type of questions** to use. By default a sample set of *Account Management* questions are provided.
7	Betty	Select one or more questions from the list.
8	Betty	Click the **Initiate Interview** button to schedule the interview.
9	Betty	The list of interviews will update to show the new interview. If the interview does not appear click the **Refresh** button. If you click the icon in the **Decision** column for one of the interviews you can see a preview of the associated notes.
10	Betty	Schedule additional interviews with Bob and Rita.
11	Betty	Click the **Back** button to go back to the list of applications for the candidate.

Conduct Interviews

Step	User	Actions
1	Adam	Log in and navigate to the *Dashboard*. Add the *My Interviews* component if you do not already have it and click the interview task to open it. Do not click the **Start** button yet.
2	Adam	From the **Details** tab you can preview the job description and resume if available.
3	Adam	From the **Questions/Notes** tab you can preview any questions that were selected for use during the interview.
4	Adam	From the **Interview History** tab you can see the status of the interviews for this candidate in regards to this position. If you click the icon in the **Decision** column for one of the interviews you can see a preview of the associated notes.
5	Adam	Go back to the **Details** tab and click the **Start** button. The task is acquired and the response buttons appear.

Step	User	Actions
6	Adam	Select the **Questions/Notes** tab and enter some notes. Click the **Save** button to save your changes.
7	Adam	Select the Details tab again and click either the **Positive Feedback** or **Negative Feedback** button. The task will close and you are taken back to the *Dashboard*.
8	Bob	Repeat steps 1 to 7 as bob, choosing a different response.
9	Rita	Repeat steps 1 to 7 as rita, choosing a different response.

Hire Candidate

Step	User	Actions
1	Betty	Log in and navigate to the *View Candidate* page. If you have enabled the **Shortcuts** you should be able to jump straight to the last one you viewed.
2	Betty	Select the **Applications** tab and click on the job opening (again, not the hyperlink but the row to the right of the hyperlink). The list of interviews will be displayed showing the different responses. Remember that you can click on the icon in the **Decision** column to preview the notes.
3	Betty	Click the **Hire** button to complete the hiring process.
4	Betty	Click the **Hire Candidate** button to complete the required steps for hiring. This dialog is just a demonstration of how a set of smaller sub-processes can be chained in a way that lets you monitor the progress dynamically. So long as you left the email address for the candidate empty the *Send Email* step should fail. You can go back and edit the candidate, setting an email address, and then retry the hiring step. In this case it should complete. Click the **Finish** button to close the hiring dialog.

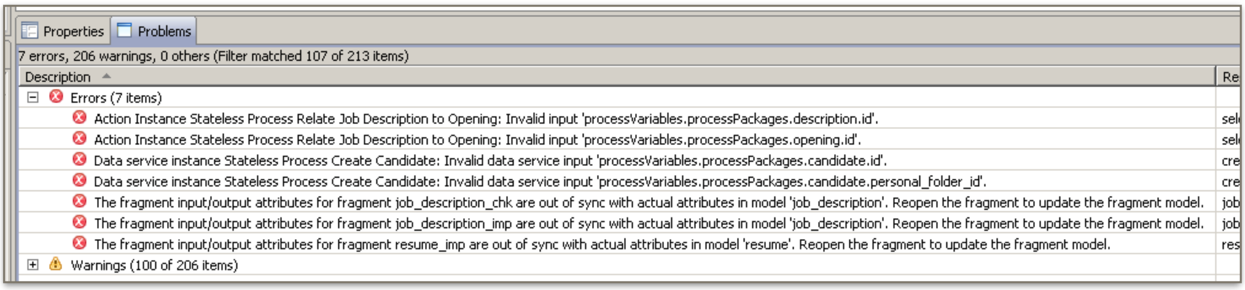
Dashboard

Step	User	Actions
1	Betty	Navigate to the *Dashboard* and click the **Configure** icon at the bottom of the dashboard.
2	Betty	You can choose from two different layouts for the components and as you make changes to the selections they are reflected in the dashboard page behind. Select four components and click the **Finish** button. Note that the **Cancel** button does not undo your changes. Each of the components is outlined below.
3	Betty	*My Interviews* component - provides a task list for scheduled interviews.
4	Betty	*My Interviews* per Status component - is a drilldown chart showing the outcome of interviews conducted by you. You can click on a column, and click the **Details** button to see those interviews. Click the **Back** button to go back to the chart.
5	Betty	*Jobs per Group* components - is a fake chart showing data from a stateless process.
6	Betty	*Candidates* component - provides quick access to the list of candidates in the system.
7	Betty	*Job Descriptions* component - shows the folder containing job descriptions. Only the first 10 job descriptions are shown. You can drag and drop from the file system into this component in order to bring job descriptions in for later use.

Known Issues

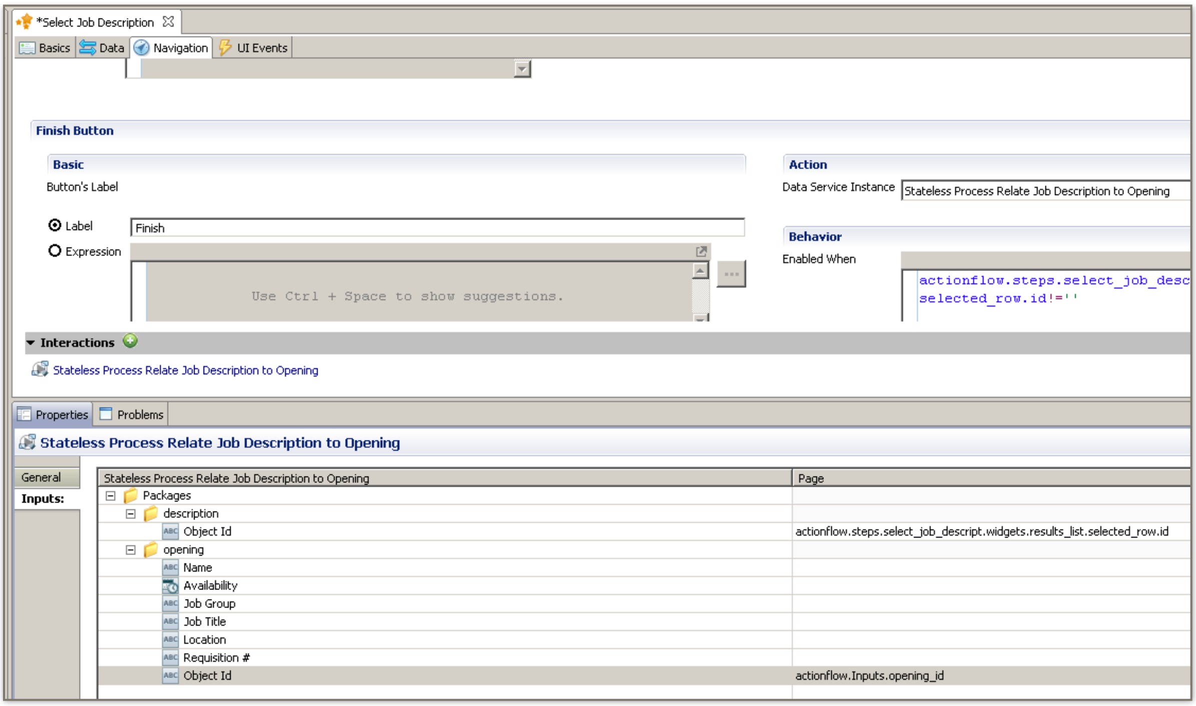
1. When viewing a job opening, the location map may not display correctly until you change tabs and come back to the Details tab or reload the page.

2. When upgrading to Patch 04, several problems are reported after importing the app into Designer as shown here.



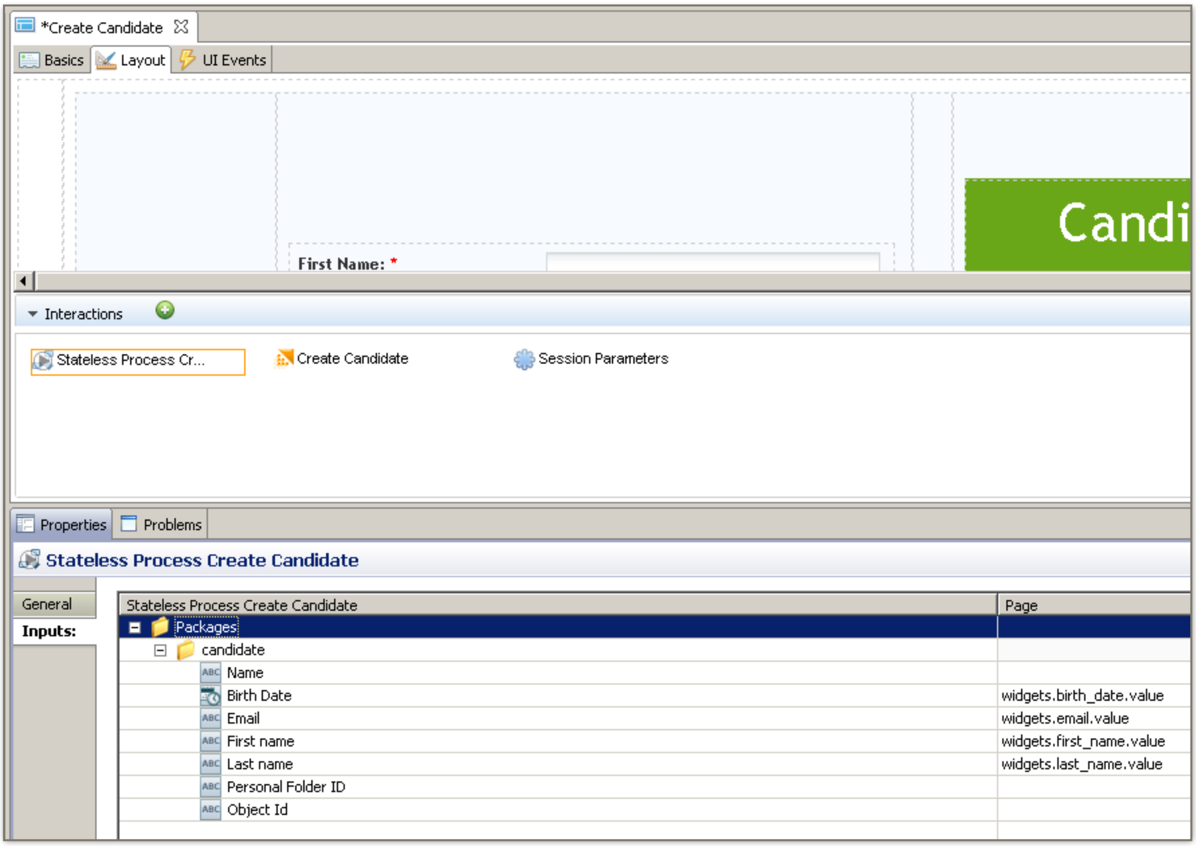
These problems need fixing manually before you can deploy as follows:

a. Open the *Select Job Description* Action Flow by double-clicking the first problem. Go to the **Navigation** tab, expand the **Interactions** panel and fix the bindings on the Stateless Process as shown below.



Save and close the Action Flow. The first two problems should be removed.

b. Open the *Create Candidate* Page by double-clicking the problem. Expand the **Interactions** panel and fix bindings on the *Create Candidate* Stateless Process as shown. Note that the error reported in the problem is misleading. The Personal Folder ID and Object Id should be left blank because these are created and populated by the process itself.



Save and close the Page. The next two problems should be removed.

c. Finally open each Page Fragment mentioned in the list of problems by double-clicking the problem, and simply save and close them. This updates the fragment data contract as required.