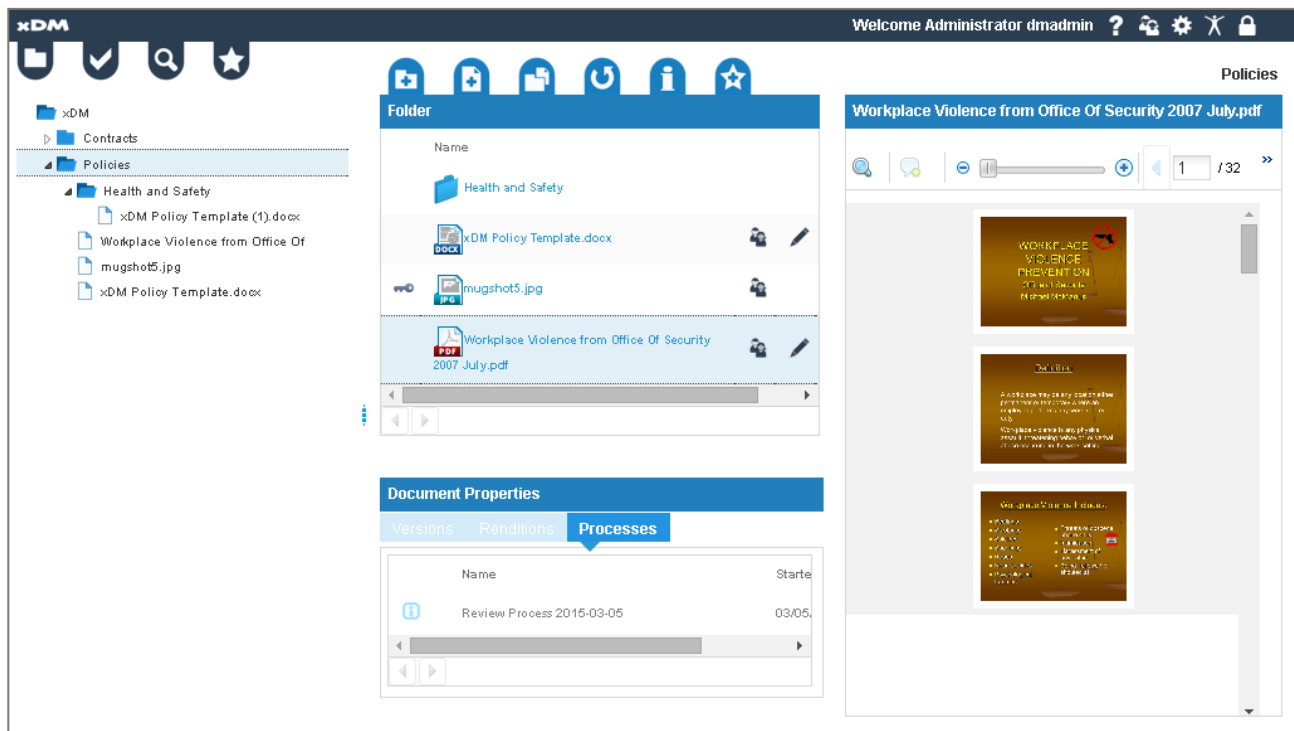


xCelerated Document Management

xCP 2.3 Sample Application

Deployment Guide



Abstract

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

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Executive Summary

The xCelerated Document Management sample application demonstrates the document management capabilities available with xCP by providing a repository browser user interface that allows a user to create folders and to manage the documents within those folders.

In addition the application also shows how an xCP application can be composed that enforces document management policies that can themselves be managed by an administrator by allowing the system administrator to define what types of documents can be stored in each folder.

Finally the application shows how an xCP application can deliver runtime user preference capabilities by allowing a user to choose the panels that they see when browsing the repository.

Audience

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

Deployment

The xCelerator has been packaged with the use of the Deployment xCelerator to simplify the setup of the required cabinet and a sample configuration of folders, 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 two steps:

1. Import of the application into xCP Designer and deployment via xDA
2. Post-deployment setup that sets up the cabinet and sample folders, document templates and test users for demonstration purposes.

Prerequisites

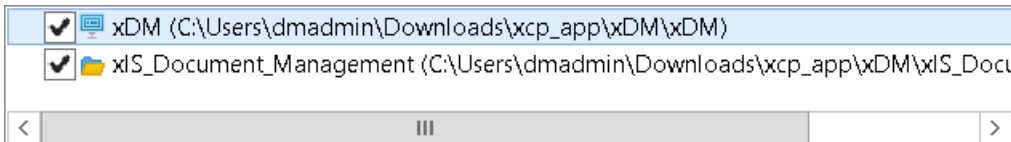
The application has been configured against the GA build of xCP 2.3 and has only been tested with that build.

Download the deployment package *xDM Release 2.3.0.zip* which contains two other zip files (*xCP Application [xDM Release 2.3.0].zip* and *Deployment Utility [xDM Release 2.3.0].zip*). These zip files contain the xCP application to be imported into Designer and the Deployment Utility xCelerator pre-configured for this application.

Ensure that the key xCP 2.3 services are running. This includes the Content Server, xDA Server, BAM Server, xPlore and the Application Server services that host the supporting applications such as Process Integrator and your xCP applications.

xCP Application

The first step in deployment of the solution is to import the xCP application into xCP Designer. Information on how to do this is provided in the xCP Designer Help. Make sure you import all application components (main project and sub project).



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

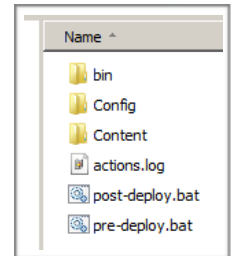
Finally configure a runtime environment from Preferences and deploy the application. If you do not update the endpoints before doing this the application will not deploy correctly and you will need to update your runtime environment settings before you can deploy.

Repository Configuration

The next 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/post-deploy.xml` and change the repository connection information in the root element as highlighted here:

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

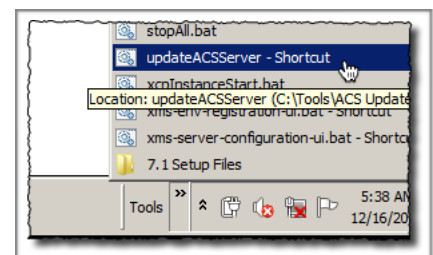
Do the same for the other elements containing `dadmin/demo.demo` (i.e.: replace user name and password with your install owner name and password).

If your install owner is not `dadmin`, also make sure to update the `acl_domain` values.

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

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`.



User Guide

Application Roles

The following table outlines the application roles and the users that are pre-created in those roles. All users login names are lowercase without spaces (e.g. green, brown etc) and all passwords are demo.demo.

Role	Description	Users
User	Create & edit documents and participate in workflows	Green, Black, Brown
Manager	Can also create folders and update their properties	Smith
Administrator	Can also delete documents and folders	dmadmin,Patel

Document Types

Four document types are available:

Document is the base type from which all others inherit

Policy is a subtype of Document

Correspondence is a subtype of Document

Contract is a subtype of Document.

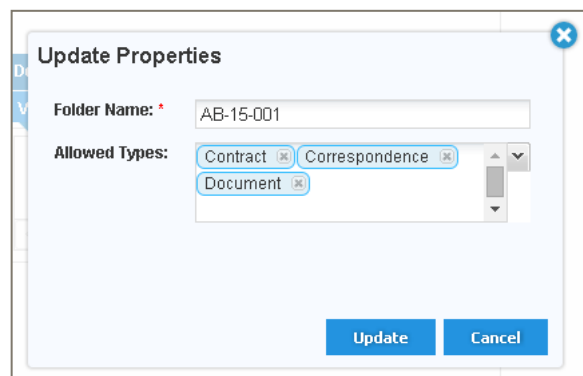
None of the types have custom attributes added, but these can be added if required, and the corresponding pages and page fragments updated. This model can also be extended with other types and the corresponding action flow inputs on the folder view pages and context menus updated to reflect any new types.

Folder Types

Two folder types are available:

Folder is a standard folder with no additional attributes.

Controlled Folder inherits from Folder and has a repeating attribute of *Allowed Types* which is used by users in the Manager and Administrator roles to manage the list of allowed document types that can be imported or created in that folder (if any).




As with the document types these models can be extended and attributes added to the types so long as the corresponding pages and page fragments are updated and the action flow inputs updated on the folder view pages and context menus.

Application Functionality

The application is very intuitive, and includes a comprehensive help page that is shown when a user first logs in or clicks the help icon in the navigation bar. Take time to read the help and understand how each feature works.

xCelerated Document Management



Welcome to this sample application that demonstrates the Content Management capabilities within xCP.

- Overview
- Navigation
- Search
- Folders
- Documents
- Tasks

Application Roles

User - Members of this role can perform content management functions.

Manager - Members of this role can also create folders and update their properties.

Administrator - Members of this role can also delete folders.

Content Management

Start by browsing the folder structure on the left. You can right-click and from the context menu you can (depending on your role) Create folders, Create documents and Import documents, as well as use the Cut/Copy/Paste options to rearrange items. Depending on your role you may also be able to edit the properties of folders and Delete folders. If you enable the client plugin from the Application Settings page then you will also be able to drag and drop files from the desktop into the folder tree and folder views.

Process Management

Documents can be sent for review. When sending a document for review you can select one or more users and choosing to send it for a review by all users in parallel, serially, or to a single person from the list with the least number of tasks already.

Display Preferences

When changing display preferences, you can choose to hide/show the preview panel and you can choose to hide/show the details panel. The details panel shows a list of document versions, a list of document renditions, and a list of review processes that the document is currently a part of. When viewing a process you can click the information icon to see further details of the status of each task assigned to the reviewers.