Deploying ICM Taskspace Application

1. Setting up Deployment Repository

The solution relies upon the following components

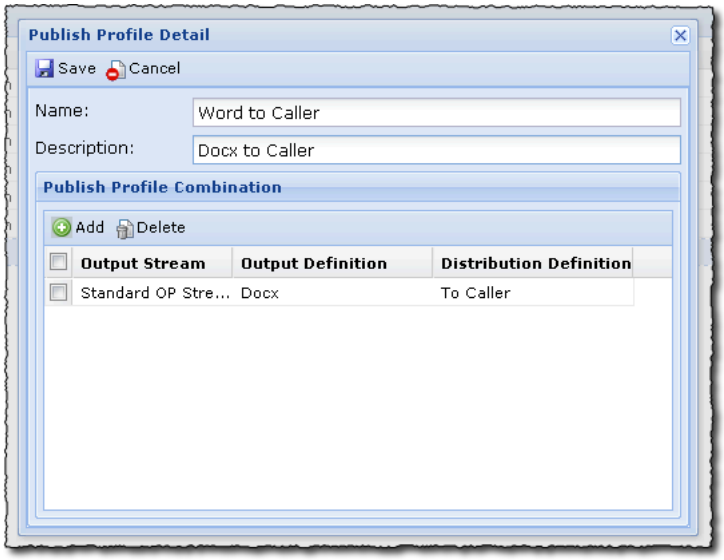
- xCP 1.5
- Document Science xPression Documentum Edition
- Corticon Rules (optional)
- CenterStage (optional)
- Advanced Search xCelerator

The following steps need to be carried out in the target docbase prior to installation.

1. Create new repository using config tool (if not already done)
2. Install CenterStage DAR's
    a. Collaboration Services (should already be present though)
    b. CenterStage
    c. CenterStagePro
    d. CenterStageTemplates
    e. Extended_Search-Clustering
    f. Extended_Search-Templates *? not done this time*
    g. Rich_Media_Services
    h. Transformation
    i. cis_artifacts
3. Install additional DAR files
    a. Forms
    b. BPM
    c. ImageServices
    d. XPRS
4. Deploy TaskSpace webapp and install TaskSpace DAR
5. Setup BAM for new repository by deleting BAM server settings and DB and re-creating
6. Grant the dmadmin user manage Audit privilege
7. Configure DocSci to point to the new docbase by updating two files found under

    ```
    C:\Program Files\Documentum\xPRS\config
    ```

    The first is `dfc.properties` which should be updated with the right repository and global registry information. The second is `app.properties` which should be updated with the repository name.
    Create a DocSci Publish Profile to output DocX to caller



Finally, add the dmadmin user to the role xpression_dashboard

8. Create CenterStage space called ICM
9. Update server config to process tasks immediately with the following API call

```
retrieve,c,dm_server_config
set,c,l,wf_agent_notify_newtask
T
save,c,l
```

2. Deploying the Application

1. Run API script to create groups.

2. Run API script to create ACL's.

3. Run API script to create users.

4. Run API script to put users into groups.

5. Deploy DAR file icm.dar. You will need to copy it to the same location as the TCMReferenceProject.dar and Collaboration.dar files. The easiest location to use is `C:\Documentum\product\6.6\install\DARsInternal`. You will also need to edit the file **docbaseOwner.installparam** to enter the correct docbase name and select it as the Input File.

6. Deploy the supporting webapp – *icm* – to an application server. Edit the file sickness.html, updating the URL to point to the location of your BPS install.

7. Synchronise BAM tables from Taskspace. You can test that this has completed by logging on using PRS. You should be able to open the ICM BAM reports without any errors.

8. For the BAM server, update the file

   `…\DctmServer_MethodServer\deploy\bam-server.war\repgen\scripts\FusionCharts.js`

   with the copy supplied. This fixes the size of the report for the tasklist view.

9. Copy the taskspace customisations to the taskspace application.

10. Deploy the advanced search accelerator by unzipping the file *adv_search_install_pkg.zip* to the root of the taskspace web application.

11. Deploy the Corticon rules file to the 'cdd' directory of Corticon and the WSDL to the axis web application root.

3. Post Deployment

3.1.Update Taskspace customisations

In order to point to a correct Captiva IA server, two of the custom TaskSpace files must be updated as follows:

…\taskspace\custom\einput\eindex.jsp

…\taskspace\custom\einput\escan.jsp

Both of these need to be edited to point to the Captiva server.

NB the configuration of Captiva for indexing the ICM content is not included in this package.

3.2.Update tasklist forms

Get the r_object_id of the bam_report to show on the main tasklist

```
select * from bam_report where object_name ='Cases By Status (small)'
```

r_object_id is 080000a58000339d

Checkout the form instance (dm_xfm_instance type) for the icm_tasklist_officer form and update the XML content for the RichText1 element with the following, replacing the URL, docbase and report object ID with correct values for your environment

<RichText1><iframe width="300" height="200" frameborder="0" scrolling="no" marginheight="0" marginwidth="0" src="http://xcpicmcs:9080/bam-server/repgen?username=dmadmin&password=demo.demo&docbase=documentum&reportId=08de75d180004dad"></RichText1>

Check the form instance back in AS THE SAME VERSION.

Repeat this for the victim support tasklist:

```
select * from bam_report where object_name ='VS Performance (Monthly)'
```

r_object_id is 080000a5800033e5

checkout the form instance for the icm_tasklist_victimsupport form and update as above.

3.3.Update Google maps files

You will need to generate a new Google maps key in order to see the maps properly working.

Go to http://code.google.com/apis/maps/signup.html and request a key (you need a Google account)

For localhost it is

ABQIAAAAMWvkHdoFQ45FJ5x-iOxlahT2yXp_ZAY8_ufC3CFXhHIE1NvwkxQLJQfkLu9aSl9sdiZZ1q85QjQWtQ

Update the files GoogleMapsCrimeScene.htm and GoogleMapsMultiCrime.htm with the new key.

NOTE for this initial release the location is hardcoded in the map for demo purposes. We do have a 'dynamic' version available that can be passed a parameter for the location to display.

You can test the maps by accessing the URL http://<appserver>:<port>/icm/map.htm.

3.4.Setting Preferences for users

Log in as each user and set the width of the preview pane to be 360 pixels in their preferences. This will ensure the optimal viewing experience on a 1024x768 monitor.

3.5.Fix picklist relations

Composer 6.5 SP3 did not create relations correctly for forms packaged in a DAR. This is not essential but prevents you from editing picklist values deployed as part of the app. You will need to create a dm_relation between each picklist item (parent) and the form instance (child) and form schema (child) using the API calls below (replace with appropriate id's).

```
# *------------ icm_picklist ------------*
create,c,dm_relation
set,c,l,relation_name
dm_xfm_instance_schema
set,c,l,parent_id
09de75d180004fd9
set,c,l,child_id
09de75d180004f12
set,c,l,description
form to schema
save,c,l

create,c,dm_relation
set,c,l,relation_name
dm_xfm_instance_form
set,c,l,parent_id
09de75d180004fd9
set,c,l,child_id
09de75d180004f7a
set,c,l,description
Relationship between icm_picklist and form
save,c,l
```

3.6.Mail Server

Create the following email accounts and assign them as defined.

Note: not all users needs an email address.

- Create email server account – e.g. courtuser@corp.com – that the system will send the documents to. This person is NOT a Documentum user, but an external party who receives files by email. The address needs to be set in the appropriate process as well (see below).
- Create email server account – e.g. courtresponse@corp.com - that the system will monitor for incoming replies from the court. Again this does not have to be a Documentum user.
- Create email account for Patel (Documentum user)
- Create email account for Judge (Documentum user - if used)

3.7.Create autonumber object

```
create icm_autonumber object set icm_name='icm_cris'
```

3.8.Fix Content Transfer

The current 6.6 download of Taskspace has an incorrect UCF jar file. To fix it simply copy the file win-jre1.6.0_16.zip to

```
...\taskspace\wdk\contentXfer
```

3.9.Configure queue users

From Documentum Administrator (or similar) add the following users/groups to queue roles.

Role	Users/Groups
queue_admin	dmadmin
queue_advance_processor	dmadmin Tims
queue_manager	Patel Tims
queue_processor	Austin Ford Good Jones Squirrel Street Tims

Log on as dmadmin (ts_designer role), and assign the following users to each queue:

Queue	Queue Manager	Active Users
Investigations / Open investigations	icm_io_supervisor	Austin Ford Street
Victim Focus Unit / New investigations	icm_vfu_supervisor	Sands Tims

Log in as officer Patel, go to Queue Management tab, and click 'My Categories' link. Choose the 'Investigation' category and say OK.

NB ADD THIS TO SCRIPT, AND ALSO PACKAGE WITH Patel as manager

3.10. System Folders

Create local folder (eg c:\Courts) directory for CPS export.

Create local folders for the import into a case (eg c:\Cases\in & c:\Cases\out).

3.11. Update Forms

Two forms have 'Help' links which point to a URL.

- icm_task_casereview_supervision – edit two links for Help text
- icm_person – update Help link

3.12. Update Activities

The following activities need to be updated with correct server names, ports etc. Note that most of these values do not need to be changed if you deploy to a single server instance with a default Apache Tomcat install ie. If you install the xCP Developer Edition, add Tomcat, and deploy TaskSpace to that, then most of these settings will work.

Make sure that you do not check out the process or version it, simply uninstall, make the changes, and reinstall.

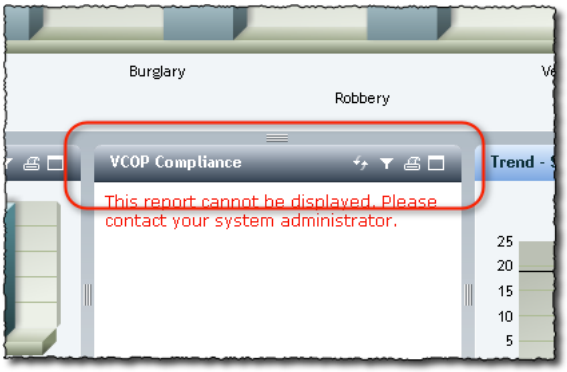
Process	Activity/Param	Description
Create CenterStage Wiki Process	*Parameter*	Update docbase_name with the name of your docbase
	Parameter	Update DFSSOAPHeaderIdentityElement with the connection information for your Centerstage repository (should be running in same Docbase as xCP)
	Create Wiki in Space	Update URL path to the WSDL. You need to click the *Read WSDL* button in order to save the changes
	E-Mail Link to Wiki	Update activity with the connection information for your mail server. Click Next and set the *From* address to something more meaningful (eg ruralshire@corp.com)
ICM Create Court Summary	*xPression Documentum Edition Publish Document*	Update activity with the connection information for your Document Science Documentum Edition server. Also select the ICM Court Summary template if not already selected and the Word to Caller profile
ICM Create Victim Letter	*xPression Documentum Edition Publish Document*	Update activity with the connection information for your Document Science Documentum Edition server. Also select the ICM Victim Letter template if not already selected and the PDF to Caller profile
ICM FTP Import	*FTP Inbound - Initiate*	Update *Base folders* and *Archive Folder* values with appropriate locations of your local folders
ICM Initial Record Review	*Parameter*	Update Parameter userCorticon depending on whether or not you have Corticon available (default is true)
	Screen with Corticon	Update activity with the connection information for your Corticon server (if available)
ICM Initiate Case Short	*Parameter*	Update Parameter mapUrlPrefix to point to the location of the icm web application
	Create Forensic Report	Update activity with the connection information for your Document Science Documentum Edition server. Also select the

Process	Activity/Param	Description
		ICM Forensic Report template if not already selected and the Word to Caller profile
	Link	From the data mapping screen update the acl_domain values set for the *action_log, summary_form* and *investigation_log* packages to be 'dm_dbo'
ICM Send to Court	*Parameter*	Update Parameter icm_ero_officer with the name of the user who is acting as the Evidentiary Review Officer (ERO). By setting this user to be 'Patel' it removes the 'supervisor review' step in this process, making it simpler to demo. Set it to 'Judge' if you want to show this step.
	Post to Wiki	Update the data mapping screen of the activity to set the values passed to the sub-process. Enter appropriate values for *mail_to* (courtuser@corp.com created earlier), *wiki_template_id* (lookup the object_id of the Blank template using DQL*) and *space_name* (name of a CenterStage space).
	FTP Outbound	Update *Base folder* value with appropriate location of your local folder
	***E**mail CPS*	Update the mail server. Update the data mapping screen of the activity to set the From address (patel@corp.com), Reply-To address (courtresponse@corp.com) and To address (courtuser@corp.com)
	Email Inbound - Step	Update the activity with the mail server and username settings to monitor for a reply from the court. The *User Name* value should be the email address you configured previously (e.g. courtresponse)
ICM Upload Photo - Person	*Parameter*	Update Parameter photoUrlPrefix to point to the location of the icm web application
	Publish Picture	Update the *Base folder* location to point to the 'image' directory of the deployed icm web application
ICM Upload Video	*Parameter*	Update Parameter videoUrlPrefix to point to the location of the icm web application. You may need to set up a mapped network drive for this to work
	Publish Video	Update the *Base folder* location to point to the 'video' directory of the deployed icm web application. You may need to set up a mapped network drive for this to work

```
* select r_object_id, object_name from  dmc_kw_template where
a_target_application_type='dmc_kw_section' order by object_name
```

3.13. Update BAM Dashboard & Create Dummy Data

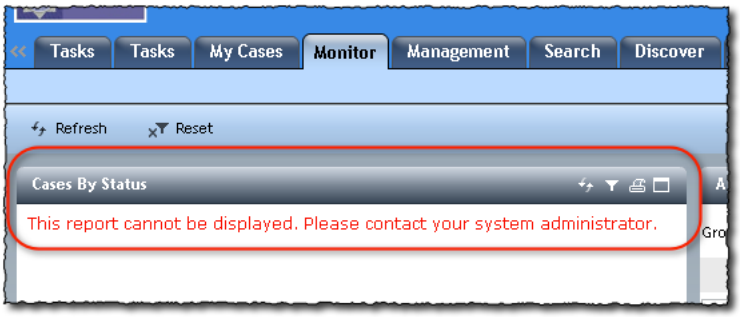
Edit the icm_management dashboard. Replace the VCOP Compliance dashlet shown here with the Victim Support Performance report.



Run the process System BAM Mockup 7 times, and enter the following data each time.

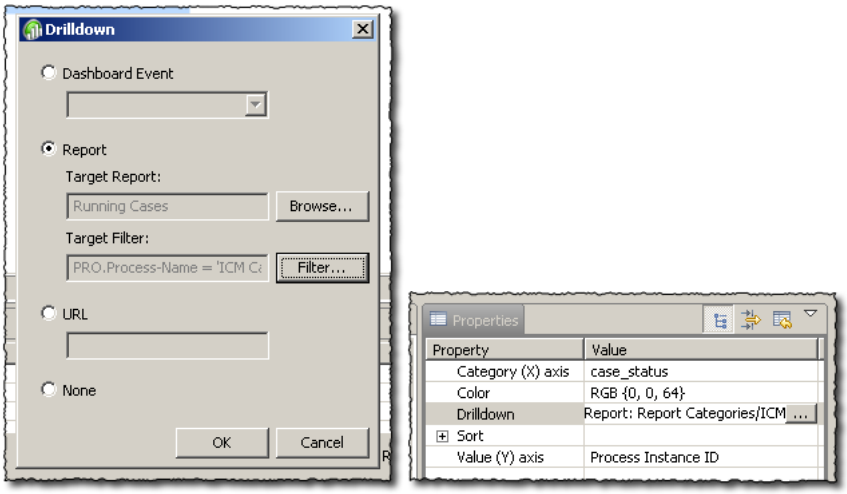
Instance	Crime Type	Month & Year	Cases	VCOP Compliance	Avg Screening Time
1	Burglary	August 2010	1600	97	19
2	Vehicle	August 2010	1543	97	21
3	Robbery	August 2010	1765	94	23
4	Violence	August 2010	1302	99	15
5	Anti-Social	August 2010	2432	93	13
6	Burglary	July 2010	1432	96	17
7	Burglary	June 2010	1025	99	22

Fix the icm_management dashboard by creating a new report called Cases by Status (the report is included in the DAR but for some reason it does not get deployed correctly by Composer).



The easiest way is to launch **Process Reporting Services** and then copy and paste the report called *Cases by Status (small)* and rename it *Cases by Status.*

Next, open the new report and go to the **Chart Data** tab. Set the **Drilldown** report to *Running Cases* and the filter to be `PRO.Process-Name = 'ICM Case Management'`.


Drilldown
Dashboard Event
Report
Target Report:
Running Cases
Browse...
Target Filter:
PRO.Process-Name = 'ICM Ca
Filter...
URL
None
OK
Cancel
Properties
Property
Value
Category (X) axis
case_status
Color
RGB {0, 0, 64}
Drilldown
Report: Report Categories/ICM
Sort
Value (Y) axis
Process Instance ID

3.15. Fix open office form templates

After deployment, the relationship between the open office templates and their form templates are lost, and these have to be recreated.

Special Measures

Locate the Special Measures Assessment template in /System/ICM Config/Reference Material and get the r_object_id. This is the parent_id. Then locate the HiFi Form in /System/Forms/icm_hfform_special_measures and get the r_object_id of the form (dm_xfm_form). This is the child_id. Then execute the following API script.

```
create,c,dm_relation
set,c,l,relation_name
dm_xfm_instance_form
set,c,l,parent_id
090000a58000339a
set,c,l,child_id
090000a580003285
set,c,l,description
Relationship between hifi template and form
save,c,l
```

Repeat for schema

Witness Statement

```
create,c,dm_relation
set,c,l,relation_name
dm_xfm_instance_form
set,c,l,parent_id
090000a5800033b1
set,c,l,child_id
090000a580003289
set,c,l,description
Relationship between hifi template and form
save,c,l
```

Repeat for schema

4. Troubleshooting

The following issues have been noted and are still open.

1. In process ICM Initiate Process Short, the activity Task Forensics failed, with an error that the file could not be checked in:

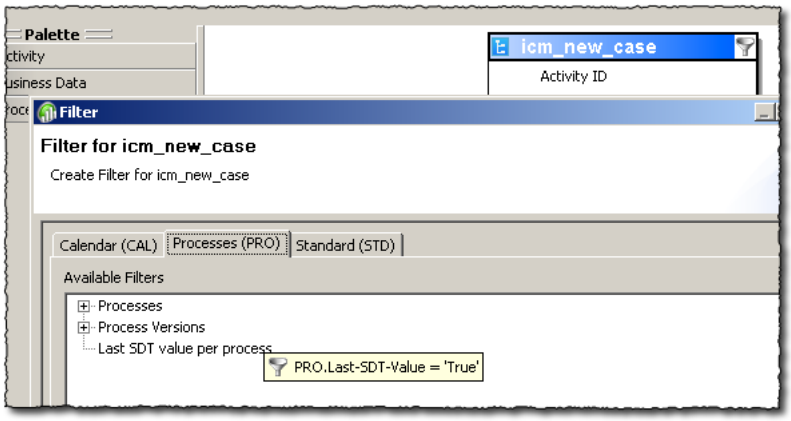
```
DfException:: THREAD: http-0.0.0.0-9080-1; MSG: Error creating instance : Import Error
while performing Could not check in document 128556507931012850778938730475 83.xml;
ERRORCODE: ff; NEXT: null in Process Template: 'ICM Initiate Case Short' - Activity:
'Task Forensics'.
Workitem: '4a0000a58000050b'
Workflow: 'Create New Incident Record []' - '4d0000a58000050a'
Activity: 'Task Forensics' - '4c0000a580003462'
```

```
Process: 'ICM Initiate Case Short' - '4b0000a58000341c'
java.lang.Exception: DfException:: THREAD: http-0.0.0.0-9080-1; MSG: Error creating
instance : Import Error while performing Could not check in document
12855650793101285077893873047583.xml; ERRORCODE: ff; NEXT: null
at com.documentum.bps.outbound.AbstractService.execute(AbstractService.java:98)
```

This works for dmadmin (if you log in as dmadmin and start a new incident). The simplest fix is to make Brown a superuser!

2. The BAM reports Cases By Status and Cases By Status (small) both show double the number of cases than they should! The BAM reports need to be adjusted to remove duplicate entries.

   The simplest fix is to go to PRS and edit the two reports, adding a new filter (PRO.Last-SDT-Value = 'True') to the icm_new_case entity as shown here:



3. The help text assigned to some of the picklist items does not get deployed (we save the value in the attribute log_entry) and so has to be added manually or through a script (the following just sets up some example entries):

```
# *------- level 1 -------*

retrieve,c,icm_picklist where object_name='Theft / burglary / robbery /
deception / forgery'
set,c,1,log_entry
The illegal taking of another person's property without that person's
freely-given consent
save,c,1


# *------- level 2 -------*

retrieve,c,icm_picklist where object_name='Burglary'
set,c,1,log_entry
Entry into a building for the purposes of committing an offence
save,c,1


# *------- level 3 -------*

retrieve,c,icm_picklist where object_name='Burglary dwelling - with intent
to cause damage'
set,c,1,log_entry
Where the intent was solely to cause criminal damage
```

```
save,c,1


retrieve,c,icm_picklist where object_name='Burglary dwelling - with intent
to steal'
set,c,1,log_entry
Where the intent was theft but the offence never took place
save,c,1

retrieve,c,icm_picklist where object_name='Burglary dwelling and theft - no
violence'
set,c,1,log_entry
Where the intent was theft and no violence was intended or inflicted
save,c,1
```

4. Some of the events created have the wrong 'type' e.g. when the case is opened the event is type 'Unavailable'. This is not a big issue, and can be updated if required by modifying the processes that create events.

   Process initiate short – Register Case Open – set to 'Case'