



D2 Installation and Administration Guide

For PleaseReview Version 7.2



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Introduction

Overview

This manual contains instructions on installing, configuring, maintaining, and troubleshooting the integration between PleaseReview document review server and OpenText™ Documentum™ D2.

It is assumed that Documentum, D2 and PleaseReview with Documentum connector are already installed, although it is also possible to install the connector into an existing PleaseReview installation.

You should follow the standard PleaseReview Installation and Administration Guide and Documentum Installation Guide until the point where you have everything ready to install the PleaseReview D2 integration.

OpenText™ Documentum™ D2 consists of two components:

- D2 Configuration: The web-based application, also known as D2 Config, for administrators to use to configure settings such as automated content-handling processes and background settings for D2 Client.
- D2 Client: The web-based application, also known as D2 Classic Client, that provides the ability to interact with content in one or more repositories.

When this guide refers to D2, it refers to the product as a whole, not the individual components.

Note that the development name for the PleaseReview product is "Tara". This name is not visible to the end user but when administering the system at the Operating System level; you will see this is reflected in the names of some files, directories, configuration entries etc.

Upgrading from an earlier version of PleaseReview

If you are upgrading from a previous version of PleaseReview, you will first need to patch the PleaseReview Server and PleaseReview Documentum (Java) Remoting Layer, in addition to reconfigure the PleaseReview Documentum System Connector so that they are all at the same patch level. Failure to do this will result in a system that is outside the normal parameters for support.

Upgrade version number

You then need to reset the internal PleaseReview version number within D2 to match that of the upgraded release.

To do this, use the D2 Configuration web application, logging in as an Admin user, and open `Data > Dictionary`. Select "PR-PleaseReviewConfigSettings" from the `Dictionaries` section which will show the `Properties` form on the right. The below screen will appear:

Properties

Name: PR-PleaseReviewConfigSettings

Description: The base URL for the corresponding instance of PleaseReview (e.g. https://pleasereview.net)

Versioned dictionary:

Administration group: admingroup

Search Dictionary available for the group:

Manual sort:

Create a registered table:

DQL dictionary:

Languages

Key	English
<input checked="" type="checkbox"/> PleaseReviewBaseURL	https://servername/PleaseReview
<input checked="" type="checkbox"/> Version	7.2.4

To update the version number, in the Languages tab find the Version key and at the English field, change the version number for your patched PleaseReview instance. Then click Save to save the dictionary.

Click Update repository to load the changes in the repository without restarting the server.

If the dictionary is modified, restart the D2 Client web application server for the changes to be reflected in D2 Client.

Scope

This manual is intended for IT staff working at the Operating System level and does not contain information for end users or for application-level administrators (workgroup administrators).

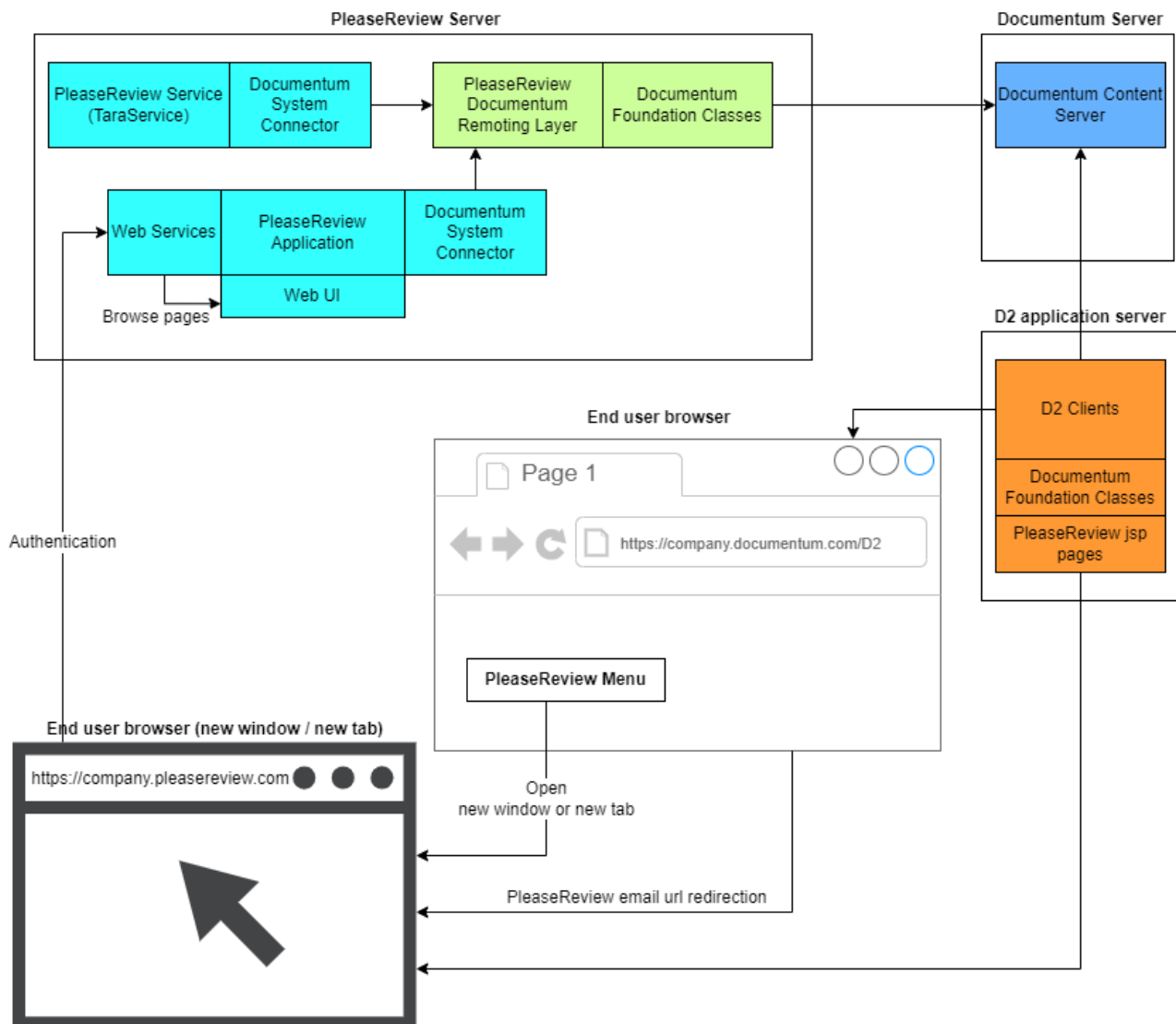
Skills required

Although the installation steps are described in detail, the installation process is largely a manual one and is not intended for the novice. To successfully install and configure the D2 integration, you should be familiar with:

- Managing file and directory permissions
- Documentum
- D2 (D2 Configuration and D2 Client)
- DA (Documentum Administrator and Documentum Query Language (DQL))

Architecture diagram

This diagram shows the touch points between PleaseReview and D2 Client. The user interacts with the D2 Client web application via the web browser. The web application access certain PleaseReview pages via a new browser window or tab.



Supported platforms

At present PleaseReview integrates with D2 20.2 running on Documentum server 20.2 with Documentum Foundation Classes (DFC) 20.2. This must be installed and functional before any further work is done.

The D2 integration has been tested running on the Apache TomCat Web Application server running on Windows Server 2019 (64 bit). If you require other platforms to be supported, please contact support.

Supported functionality

Some of the standard PleaseReview functionality is not available when used in Documentum D2 and hence is not supported. Details of these can be found in Appendix A, along with details of known limitations.

Configuring the PleaseReview server

Overview

When PleaseReview is integrated with D2 some configuration changes will be required to the PleaseReview Documentum system connector configuration. This is required to make PleaseReview work within the D2 document workflow.

Prerequisites

This section lists the software that must already be installed on the target system, and any specific details regarding versions or configuration of that software.

D2

All necessary baseline PleaseReview DocBase configuration is completed within the D2 Configuration web-based application and that the interface must be fully setup and operational before this installation is started. Specifically confirm that:

- D2-Base Application is configured
- Users are added to `d2-base_users` group
- The D2-Base application and workspace is available for all the users. This guide will use the D2-Base application and workspace for D2 integration configuration. If you wish to setup a different application for this integration, select the respective `Application` value you want in section Installing the D2 integration.
- Admin user able to create D2 Dictionary in D2 Configuration (`Data > Dictionary`)
- Admin user able to create Menu D2 in D2 Configuration (`Go to > Menu D2`)
- Admin user able to enable actions for Intelligent URLs in D2 Configuration (`Tools > Options`)

Documentum Administrator

Documentum Administrator (DA) is a web-based interface for monitoring, administering, configuring, and maintaining Documentum repositories from any system running a web browser. The installation steps in this D2 integration guide requires DA to execute DQL scripts to create DocBase groups and roles. Specifically confirm that:

- Select `Tools > Dql Editor` is available

PleaseReview

The PleaseReview server itself must be fully operational before this installation is started. Specifically confirm that:

- The PleaseReview Documentum System Connector is installed and operational.
- D2 users have been added to PleaseReview and can login.
- D2 users can add documents from D2 into a PleaseReview review using the PleaseReview interface.

Required configuration changes

Log onto the PleaseReview server and open the file `Runtime/config/DCTMLogin.xml` in a text editor.

Turn off Embed Review User Setting

Turn off the Embed Review User Setting as this feature is not available in the D2 integration. To do this change:

```
<EmbedReviewUserSetting>true</EmbedReviewUserSetting>
```

to

```
<EmbedReviewUserSetting>>false</EmbedReviewUserSetting>
```

Restart the PleaseReview services

For any configuration changes to take effect, the PleaseReview services (TaraWeb and TaraService) must be restarted. This can be done from the menu within the AdminClient. Configuration changes will NOT take effect until the services are restarted.

Optional configuration

Log onto the PleaseReview server and open the file `Runtime/config/DCTMLogin.xml` in a text editor.

Turn on default label for document upon check in

When PleaseReview checks a minor version into D2 it is possible to set the default check in label for the version. To do this change:

```
<CheckinLabel></CheckinLabel>
```

to the desired value, for example:

```
<CheckinLabel>Checked in from PleaseReview</CheckinLabel>
```

Set document label to current if it is not yet approved

If a document is not "Approved" then when PleaseReview checks the document in, the label "CURRENT" must also be added to the `<CheckinLabel>` above. If the document is "Approved" then the label "CURRENT" will not be applied and the last "Approved" version will be left as "CURRENT" instead.

This setting is not active by default and is optional for the D2 integration. To turn it on change:

```
<SetCurrentIfNoLabel></SetCurrentIfNoLabel>
```

to

```
<SetCurrentIfNoLabel>Approved</SetCurrentIfNoLabel>
```

Installing the D2 integration

Things you will need to know

There are several configuration settings that will need to be specified during the installation. Some of these are things you will need to find out and some are things you need to decide. This section lists them up front so you can make sure you have all the necessary information in hand before you proceed with the installation itself.

The URL of the PleaseReview server

You will need to know the location (URL) of the PleaseReview server. This is normally `https://servername/PleaseReview` or just `https://servername` (if configured)

The groups of D2 users who will use PleaseReview

For the PleaseReview D2 integration to decide who will be permitted to see the PleaseReview specific context menu and the PleaseReview Inbox, a list of groups for those users will be required. It is advisable that these groups are created as "locked" workgroups in PleaseReview after being created in D2. In this way, the members of the PleaseReview workgroup will automatically be synchronized with the source D2 group by PleaseReview.

Locate the D2 webapps directory

All file system paths in this installation guide are relative to the location of the D2 web application. This is normally at:

```
%CATALINA_HOME%\webapps\D2
```

where %CATALINA_HOME% is where the Apache Tomcat application server is installed (\$CATALINA_HOME on Unix/Linux). From now on this directory will be referred to as \D2 and all paths will be relative to it.

Installing the software

Installing the files

Extract the content from the provided `PleaseReview_D2_UI_[version].zip` zip file into a temporary directory. It will contain the following folders:

- CustomJSP
- DQL

Creating DocBase Objects

All the tasks carried out in this section are carried out using DQL. To do this, log into DA as an Admin user with Superuser privileges and bring up the Dql Editor window (Tools > Dql Editor).

PleaseReview DocBase Roles

Now open the file `\DQL\create PleaseReview roles.txt` and copy each DQL statement into the Dql Editor window and execute it.

This creates the roles "d2-pleasereview_owner", "d2-pleasereview_participant" and "d2-pleasereview_admin", which are used to determine who will be permitted to see the PleaseReview specific context menu and the PleaseReview Inbox within D2 Client.

Please note, during PleaseReview upgrades, only DQL statements relating to DocBase roles that do not already exist will need to be executed.

Step not required Step Completed Step Failed

Date and Signature:

Groups for locked workgroups

If you intend to create "locked" workgroups in PleaseReview, as recommended in section The groups of D2 users who will use PleaseReview, these will be configured as synced workgroups in PleaseReview later. Locked workgroups mean that PleaseReview will keep its member list in sync with that of the source Documentum group and is an easy way to manage everything in Documentum itself.

The file `\DQL\create_example_PleaseReview_workgroup.txt` provides an example of how to do this for a group called "*example_group*". For each group you wish to create, you will need to replace each occurrence of the word "*example*" with the appropriate group name prefix (for example, *sales_group*, *support_group*, etc.).

Each group created by the DQL script will have a base group and four sub groups. The sub groups represent the roles the individual users will have within PleaseReview. When users are added to the groups within D2, they will be added to the group that represents their maximum PleaseReview role. Non-Admin users should only be added to one of the sub groups that is most applicable to them.

For example, if the base group is called "*sales_group*", all of the users intended to only review documents will be added to D2 group "*sales_group_reviewers*" while those users who may create reviews and contribute to other reviews will be in "*sales_group_author-contributor*". To add users with Admin roles, see section Validate PleaseReview Workgroup Administration.

Each of the amended DQL statements should then be copied into the Dql Editor window and executed.

You can logout from DA now as it is not required for the configuration below.

Step not required Step Completed Step Failed
Date and Signature:

Installing the PleaseReview custom code

Copy the folder and its contents from

`\CustomJSP\pleasereview`

Into

`\D2\pleasereview`

This contains all the custom code needed by the custom actions.

Please note, this step will need to be repeated during upgrades if directed in the release notes.

Step not required Step Completed Step Failed
Date and Signature:

Configuring PleaseReview dictionaries

A D2 Dictionary is a collection of key values and one or more sets of descriptive labels, used to provide value assistance to the end user. PleaseReview uses D2 dictionary to save the PleaseReview URL endpoint, so that the integration can use the value and redirect to the PleaseReview instance.

Log into D2 Configuration as an Admin user with Superuser privileges and navigate to `Data > Dictionary`, this will open `Dictionaries` form. Ensure `D2-Base` is selected on the application drop-down on the menu bar. Next, click on the `New` button from the menu bar, and key in the values as below:

Field	Value
Name	PR-PleaseReviewConfigSettings
Description	The base URL for the corresponding instance of PleaseReview (e.g., https://pleasereview.net)
Applications	D2-Base
Administration group	admingroup
Languages	
Key	English
PleaseReviewBaseURL	https://servername/PleaseReview
Version	7.x.x

In the English field on `PleaseReviewBaseURL` key enter the base URL value for your PleaseReview instance. Please note the URL value MUST NOT end with a '/' character.

In the English field on `Version` key enter the version number for your patched PleaseReview instance.

Then, click save to save the dictionary. For example:

The screenshot shows the D2 Client web application interface. At the top, there is a toolbar with icons for 'Create from...', 'Save', 'Cancel', 'Delete', 'Import...', 'Export...', 'Save dictionary', 'Restore dictionary', 'Update repository', and a dropdown menu for 'D2-Base'. Below the toolbar is the 'Properties' section, which includes a 'Name' field with the value 'PR-PleaseReviewConfigSettings', a 'Description' field with the value 'The base URL for the corresponding instance of PleaseReview (e.g. https://pleasereview.net)', and a 'Parent name' field. There are also checkboxes for 'Versioned dictionary', 'Manual sort', 'Create a registered table', and 'DQL dictionary'. Below the 'Properties' section is the 'Languages' section, which has tabs for 'Languages' and 'Alias'. The 'Languages' tab is active, showing a table with columns for 'Key' and 'English'. The table contains two rows: 'PleaseReviewBaseURL' with the value 'https://servername/PleaseReview' and 'Version' with the value '7.2.4'. There are also buttons for 'Add language', 'Remove language', and 'Remove value'.

Click `Update repository` to load the changes in the repository without restarting the server.

If the dictionary is modified, restart the D2 Client web application server for the changes to be reflected in D2 Client.

Step not required Step Completed Step Failed



Date and Signature:

D2 client menus for PleaseReview pages

Navigate to **Go to > Menu D2**, ensure **D2-Base** is selected on the application drop-down on the menu bar. Then proceed to configure the following menus for D2 Client.

Configuring PleaseReview (new review) on contextual menus

In **Contextual menus** section, expand **<Right click>** and configure the following menus:

- Click on **Properties** menu at the bottom of the list, then on **Add separator** 
- Click on the newly created **separator** added in the above step, then click on **Add menu item**  and configure the appearance of selected menu entry as described in the following table:

Field	Value
Label En	PleaseReview
Applications	D2-Base
Action	Publish event : "\$value(event)"
Message	<p>url=[[YourPleaseReviewBaseURL]]/Services/AjaxLogin.aspx?userName=\$LOGIN&extsource=Documentum:\$DOCBASE&returnUrl=../Main/NewReview.aspx?extsource=Documentum:\$DOCBASE%26extref1=\$value(r_object_id)&password=\$TICKET!!windowName==gsearch!!windowFeatures==width=1000,height=700</p> <p>Note: Where [[YourPleaseReviewBaseURL]] should be replaced by your base PleaseReview URL as noted in section The URL of the PleaseReview server, e.g., https://servername/PleaseReview</p>
Event	<p>D2_ACTION_OPEN_URL</p> <p>Note: Action will be automatically set to Publish event : "D2_ACTION_OPEN_URL"</p>

Conditions:	
Add Conditions type	Condition parameters
Actions Selection can be checked out	-
Object Attribute "\$value(property)" is equal to "\$value(value)"	Condition valid on: all selected objects Property: r_object_type Value: dm_document
Object Selection has content	-
Permits and privileges User has minimum "\$value(value)" permit on the selection	Permit: read
Permits and privileges User is into group "\$value(value)"	Group: d2-pleasereview_owner

- Click Save.

D2-Base

Properties

Name: * Parent name:

Description:

Applications:

Menu properties

Hide this entry:

Label en : * Label fr :

Shortcut:

Action

Action:

Message:

Parameters

Event : *

Conditions

Selection can be checked out

Attribute "r_object_type" is equal to "dm_document"

Selection has content

User has minimum "read" permit on the selection

User is into group "d2-pleasereview_owner"

Condition parameters

Display disabled instead of hidden: Disabled Hidden

Invert the condition:

Step not required
 Step Completed
 Step Failed

Date and Signature:

Configuring PleaseReview as PDF (New Review) on contextual menus

In Contextual menus section, click on the newly created PleaseReview menu added in the above

step, then click on Add menu item  and configure the appearance of the selected menu entry as described in the following table:

Field	Value
Label En	PleaseReview as PDF
Applications	D2-Base
Action	Publish event : "\$value(event)"
Message	<p>url=[[[YourPleaseReviewBaseURL]]/Services/AjaxLogin.aspx?userName=\$LOGIN&extsource=Documentum:\$DOCBASE&returnUrl=../Main/NewReview.aspx?extsource=Documentum:\$DOCBASE%26extref1=\$value(r_object_id):GET:pdf&password=\$TICKET!!windowName==gsearch!!windowFeatures==width=1000,height=700</p> <p>Note: Where [[YourPleaseReviewBaseURL]] should be replaced by your base PleaseReview URL as noted in section The URL of the PleaseReview server, e.g., https://servername/PleaseReview</p>
Event	<p>D2_ACTION_OPEN_URL</p> <p>Note: Action will be automatically set to Publish event : "D2_ACTION_OPEN_URL"</p>

Conditions:

Add Conditions type	Condition parameters
<p>Actions</p> <p>Selection can be checked out</p>	-
<p>Hyperlink</p> <p>Selection has PDF content or rendition</p>	-
<p>Object</p> <p>Attribute "\$value(property)" is equal to "\$value(value)"</p>	<p>Condition valid on: all selected objects</p> <p>Property: r_object_type</p> <p>Value: dm_document</p>
<p>Object</p> <p>Selection has content</p>	-
<p>Permits and privileges</p> <p>User has minimum "\$value(value)" permit on the selection</p>	Permit: read

Permits and privileges User is into group "\$value(value)"	Group: d2-pleasereview_owner
---	------------------------------

Click Save.

Create from... Save Cancel Delete [Icons] D2-Base

Properties

Name: * D2-Base Menu Parent name: []

Description: [] Applications: D2-Base

Menu properties

Hide this entry: Label en: * PleaseReview as PDF Shortcut: []

Action

Action: Publish event : "D2_ACTION_OPEN_URL"

Message: url=https://servername/PleaseReview/Services/AjaxLogin.aspx?userName:

Parameters

Event : * D2_ACTION_OPEN_URL

Conditions

Selection can be checked out
Selection has PDF content or rendition
Attribute "r_object_type" is equal to "dm_document"
Selection has content
User has minimum "read" permit on the selection
User is into group "d2-pleasereview_owner"

Condition parameters

Display disabled instead of hidden: Disabled Hidden

Invert the condition:

Step not required Step Completed Step Failed

Date and Signature:

Configuring PleaseReview Inbox on main menu

In Main menu section, expand Content and configure the following menus:

- Click on Paste menu at the bottom of the list, then on Add separator []
- Click on the newly created separator added in the above step, then click on Add menu item [] and configure the appearance of selected menu entry as described in the following table:

Field	Value
Label En	PleaseReview Inbox
Applications	D2-Base
Action	Publish event : "\$value(event)"
Message	url=[[YourPleaseReviewBaseURL]]/Services/AjaxLogin.aspx?userName=\$LOGIN&extsource=Documentum:\$DOCBASE&extRef1=\$value(r_object_id)&returnUrl=../Main/Inbox.aspx?InboxCustomAction=3&password=\$TICKET

	Note: Where [[YourPleaseReviewBaseURL]] should be replaced by your base PleaseReview URL as noted in section The URL of the PleaseReview server, e.g., https://servername/PleaseReview				
Event	D2_ACTION_OPEN_URL Note: Action will be automatically set to Publish event : "D2_ACTION_OPEN_URL"				
Conditions:					
<table border="1"> <thead> <tr> <th>Add Conditions type</th> <th>Condition parameters</th> </tr> </thead> <tbody> <tr> <td>Permits and privileges User is into group "\$value(value)"</td> <td>Group: d2-pleasereview_admin d2-pleasereview_owner d2-pleasereview_participant</td> </tr> </tbody> </table>		Add Conditions type	Condition parameters	Permits and privileges User is into group "\$value(value)"	Group: d2-pleasereview_admin d2-pleasereview_owner d2-pleasereview_participant
Add Conditions type	Condition parameters				
Permits and privileges User is into group "\$value(value)"	Group: d2-pleasereview_admin d2-pleasereview_owner d2-pleasereview_participant				

- Click save.

Create from... Save Cancel Delete Java D2-Base

Properties

Name: * Parent name:

Description: Applications:

Menu properties

Hide this entry: Label en : * Shortcut:

Action

Action: Message:

Parameters

Event : *

Conditions

User is into group "d2-pleasereview_admin, d2-pleasereview_owner, d2-pleasereview_participant"

Condition parameters

Display disabled instead of hidden: Disabled Hidden


Invert the condition:

Group : *

Step not required Step Completed Step Failed

Date and Signature:

Configuring My PleaseReview Settings on main menu

In Main menu section, click on the newly created My PleaseReview Inbox menu added in the above step, then click on Add menu item  and configure the appearance of selected menu entry as described in the following table:

Field	Value
Label En	My PleaseReview Settings
Applications	D2-Base
Action	Publish event : "\$value(event)"
Message	<p>url=[[YourPleaseReviewBaseURL]]/Services/AjaxLogin.aspx?userName=\$LOGIN&extsource=Documentum:\$DOCBASE&extRef1=\$value(r_object_id)&returnUrl=../Admin/UserSettings.aspx?extsource=Documentum:\$DOCBASE&password=\$TICKET!!windowName==gsearch!!windowFeatures==width=1000,height=700</p> <p>Note: Where [[YourPleaseReviewBaseURL]] should be replaced by your base PleaseReview URL as noted in section The URL of the PleaseReview server, e.g., https://servername/PleaseReview</p>
Event	<p>D2_ACTION_OPEN_URL</p> <p>Note: Action will be automatically set to Publish event : "D2_ACTION_OPEN_URL"</p>
Conditions:	
Add Conditions type	Condition parameters
Permits and privileges	Group:
User is into group "\$value(value)"	<p>d2-pleasereview_owner</p> <p>d2-pleasereview_participant</p>

- Click Save.

Properties
 Name: * Parent name:
 Description: Applications:

Menu properties
 Hide this entry: Label en : * Shortcut:
Action
 Action:
 Message:
Parameters
 Event : *

Conditions

Condition parameters
 Display disabled instead of hidden: Disabled Hidden
 Invert the condition:
 Group : *

Step not required Step Completed Step Failed
 Date and Signature:

Configuring PleaseReview Distribution Lists on main menu

In Main menu section, click on the newly created My PleaseReview Settings menu added in the above step, then click on Add menu item and configure the appearance of selected menu entry as described in the following table:

Field	Value
Label En	PleaseReview Distribution Lists
Applications	D2-Base
Action	Publish event : "\$value(event)"
Message	url==[[YourPleaseReviewBaseURL]]/Services/AjaxLogin.aspx?userName=\$LOGIN&extsource=Documentum:\$DOCBASE&extRef1=\$value(r_object_id)&returnUrl=../DistributionLists/DistListAdmin.aspx?extsource=Documentum:\$DOCBASE&password=\$TICKET!!windowName==gsearch!!windowFeatures==width=1000,height=700 Note: Where [[YourPleaseReviewBaseURL]] should be replaced by your base PleaseReview URL as noted in section The URL of the PleaseReview server, e.g., https://servername/PleaseReview
Event	D2_ACTION_OPEN_URL Note: Action will be automatically set to Publish event : "D2_ACTION_OPEN_URL"

Add Conditions type	Condition parameters
Permits and privileges User is into group "\$value(value)"	Group: d2-pleasereview_owner

Click save.

D2-Base ▼

Properties

Name: * Parent name:

Description:

Applications:

Menu properties

Hide this entry:

Label en : * Shortcut:

Action

Action:

Message:

Parameters

Event : *

Conditions

User is into group "d2-pleasereview_owner"

Condition parameters

Display disabled instead of hidden: Disabled Hidden

Invert the condition:

Group : *

Step not required
 Step Completed
 Step Failed

Date and Signature:

Configuring PleaseReview Workgroup Administration on main menu

In Main menu section, click on the newly created PleaseReview Distribution Lists menu added in the above step, then click on Add menu item and configure the appearance of selected menu entry as described in the following table:

Field	Value
Label En	PleaseReview Workgroup Administration
Applications	D2-Base
Action	Publish event : "\$value(event)"
Message	url=[[YourPleaseReviewBaseURL]]/Services/AjaxLogin.aspx?userName=\$LOGIN&extsource=Documentum:\$DOCBASE&extRef1=\$value(r_object_id)&returnUrl=../Admin/Workgroupmanagement.aspx?extsource=Documentum:\$DOCBASE&

	<p>password=\$TICKET!!windowName==gsearch!!windowFeatures==width=1000,height=700</p> <p>Note: Where [[YourPleaseReviewBaseURL]] should be replaced by your base PleaseReview URL as noted in section The URL of the PleaseReview server, e.g., https://servername/PleaseReview</p>						
Event	<p>D2_ACTION_OPEN_URL</p> <p>Note: Action will be automatically set to Publish event : "D2_ACTION_OPEN_URL"</p>						
<p>Conditions:</p> <table border="1"> <thead> <tr> <th>Add Conditions type</th> <th>Condition parameters</th> </tr> </thead> <tbody> <tr> <td>Permits and privileges</td> <td>Group: d2-pleasereview_admin</td> </tr> <tr> <td>User is into group "\$value(value)"</td> <td></td> </tr> </tbody> </table>		Add Conditions type	Condition parameters	Permits and privileges	Group: d2-pleasereview_admin	User is into group "\$value(value)"	
Add Conditions type	Condition parameters						
Permits and privileges	Group: d2-pleasereview_admin						
User is into group "\$value(value)"							

Click Save.

The screenshot shows the configuration interface for a menu item. At the top, there is a toolbar with buttons for 'Create from...', 'Save', 'Cancel', and 'Delete', along with a dropdown menu set to 'D2-Base'. Below the toolbar are three main sections:

- Properties:** Includes fields for 'Name' (D2-Base Menu), 'Parent name', 'Description', and 'Applications' (D2-Base).
- Menu properties:** Includes a 'Hide this entry' checkbox, 'Label en' (PleaseReview Workgroup Administration), 'Shortcut', 'Action' (Publish event : "D2_ACTION_OPEN_URL"), and 'Message' (url=https://servername/PleaseReview/Services/AjaxLogin.aspx?userName=).
- Conditions:** Shows a list of conditions with 'User is into group "d2-pleasereview_admin"' selected. To the right, 'Condition parameters' are set to 'Group : *' and 'd2-pleasereview_admin'. There are also radio buttons for 'Display disabled instead of hidden' (Disabled/Hidden) and a checkbox for 'Invert the condition'.

Step not required
 Step Completed
 Step Failed

Date and Signature:

Configuring the PleaseReview email templates

When a user in PleaseReview does certain actions, emails may be sent to interested parties (usually the review participants). These emails contain a hyperlink which directs users back into the main

PleaseReview interface, which is not normally desirable when PleaseReview is integrated with the D2 Client user interface.

The PleaseReview D2 integration includes additional email templates that provide the user with a link into D2 Client rather than directly into PleaseReview. The link will browse to D2 Client and then open a new browser tab for PleaseReview Inbox. The actions below need to be performed on the PleaseReview server as it sends these emails; and on D2 Configuration to allow open URL action.

In the PleaseReview server, the `Runtime` directory is a sub-directory of the location where PleaseReview is installed. To install these special email templates, do the following:

- Locate the directory `Runtime/config/EmailTemplates` in the PleaseReview installation directory.
- Copy the contents of the folder `/EmailTemplates/Documentum.d2` to `/EmailTemplates/Documentum`, overwriting any files which already exist. There should now be a directory called `EmailTemplates/Documentum` inside PleaseReview.
- Rename the file `d2url.xml.template` to `d2url.xml` located at folder `EmailTemplates/Documentum`, if it does not already exist. Then edit content of `d2url.xml` by replacing the following variables as mentioned below:
 - Replace `[[D2URL]]` with the root part of the URL the users use to access D2 Client. E.g. `<xsl:variable name="d2url">http://DOCUMENTUM:8080/D2</xsl:variable>`
 - Replace `[[DOCBASE]]` to Documentum repository name. E.g. `<xsl:variable name="docbase">TEST</xsl:variable>`

The following steps in D2 Configuration allows D2 Client to open a URL in a new browser window:

- Navigate to `Tools > Options` from the menu bar.
- Under `Allowed actions` in `URL` section, add `D2_ACTION_OPEN_URL` to `Allowed actions`.
- **Click Save.**

There is a limitation on `D2_ACTION_OPEN_URL` action where it needs to locate a folder or a document to request D2 to open a URL in a new browser window. By default, email template setting is located at `/Templates/D2` folder, you can change the location path by replacing the value of `locatePath` variable in `d2url.xml`.

Any user using PleaseReview and authenticated by D2 Client using their Documentum credentials will see these emails, but users who are not authenticated by D2 Client will see the standard emails that will return them into the standard PleaseReview user interface.

All the configuration changes have now been made and as a result the D2 Configuration web application can now be closed.

Step not required Step Completed Step Failed

Date and Signature:

Restart D2 Client web application

Restart the D2 Client web application server to ensure all the changes applied in this section take effect.

Step not required Step Completed Step Failed

Date and Signature:

Recycle Tara Services

Recycle the PleaseReview TaraService and TaraWeb application pool to ensure all the changes applied in sections Required configuration changes, and Configuring the PleaseReview email templates, take effect.

Step not required Step Completed Step Failed

Date and Signature:

Testing the installation

This test will involve creating a test review from within the D2 Client and validating pages are displayed correctly with the correct permissions.

Sync Test User into PleaseReview

For this, pick a user who is a member of one of the groups defined earlier (section Groups for locked workgroups). This user must have author permissions within PleaseReview and hence must have been synced into a suitable group within PleaseReview. For example, if you had called your workgroup "sales_group", as in the example in section Groups for locked workgroups, you would need to assign them to the documentum group "sales_group_author" to ensure they have author permissions within PleaseReview.

The group "sales_group" would then need to be re-synced within PleaseReview. Remember that no other sub groups should be synchronized to PleaseReview, only the base group.

Set Test User permission

What PleaseReview items (widget, main menu, and action context menu) a user sees in D2 Client is controlled by whether the user is assigned to the "d2-pleasereview_owner", "d2-pleasereview_participant" and "d2-pleasereview_admin" roles within D2.

As the test user is an Author they will need to be assigned to the role "d2-pleasereview_owner" as this will give them the ability to see the PleaseReview context menu within D2. This should be done now using an Admin account.

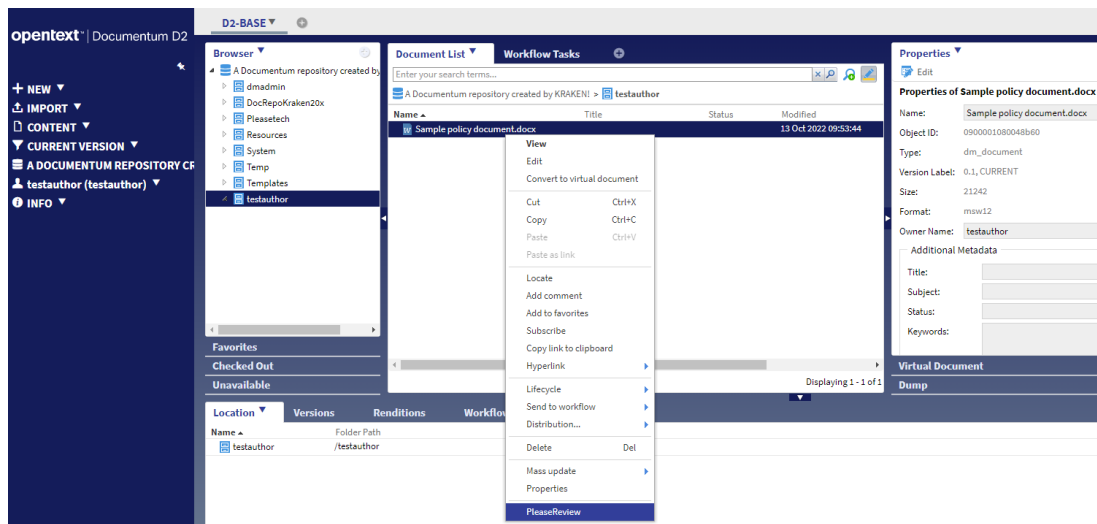
Please note, that until a user has been synced into PleaseReview as discussed in section Sync Test User into PleaseReview, they will not be able to use the PleaseReview functionality within D2 Client. As a result, it is not recommended to assign the users either "d2-pleasereview_owner" or "d2-pleasereview_participant" roles until after the sync has occurred.

In addition, this user should be given VERSION permission within D2, as they will need this to be able to check any documents reviewed in PleaseReview back into D2.

Create new review

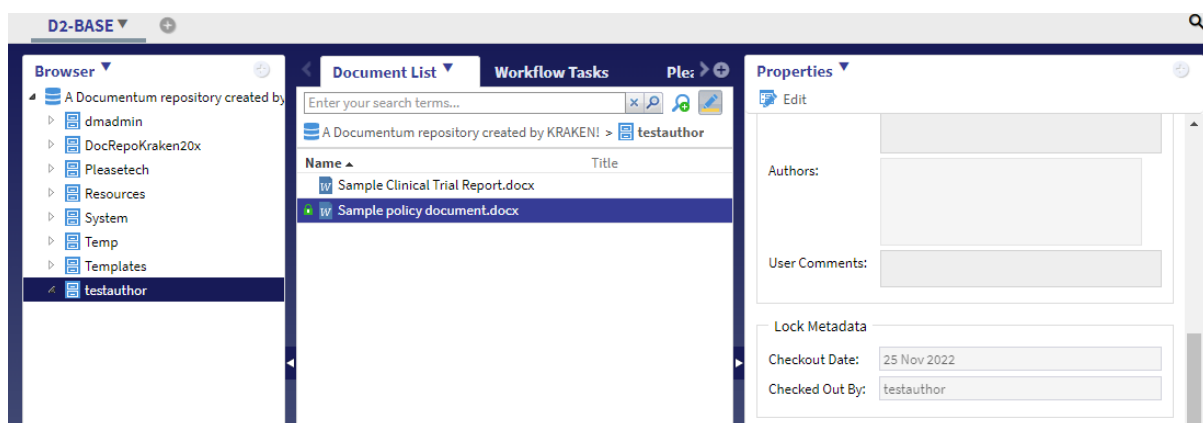
Log into D2 Client as the test author user. Please note, this user must also be able to log in to PleaseReview as well, using their Documentum credentials.

First, browse to a Document List in the D2 Client interface and select a Word document that you have version permission on so that it is highlighted. Now right-click on the document and click on the "PleaseReview" context menu as shown below, which will open a new browser window and launch the PleaseReview new review wizard. You should not be asked to log in to PleaseReview at this point because you will have been automatically authenticated to PleaseReview via Documentum.



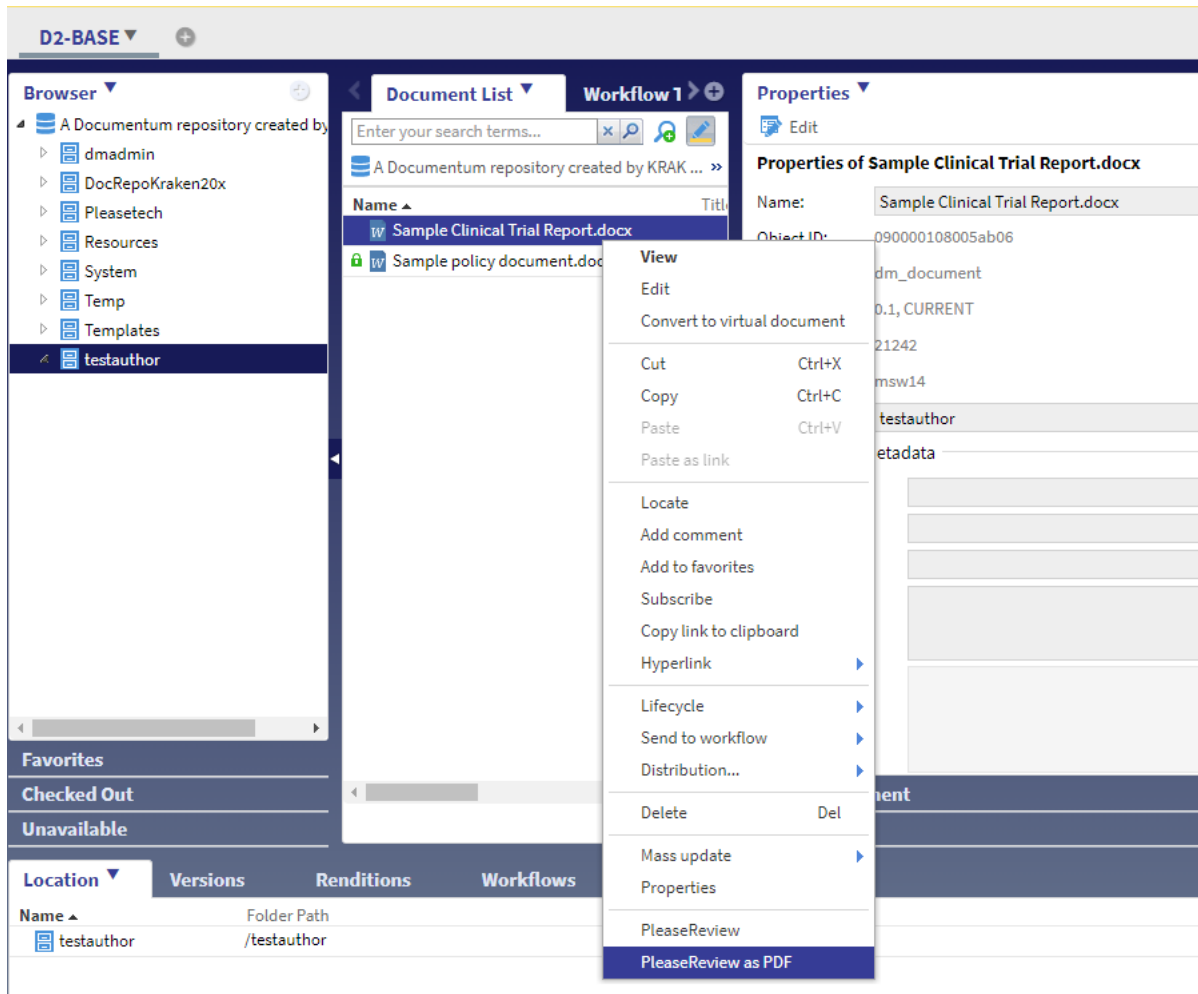
Follow through the PleaseReview new review wizard as normal. Once the steps are completed, start the review then close the PleaseReview browser window.

Browse to Document List in the D2 Client interface and refresh the Document List widget, check the document that you selected above, the document should be checked out in Documentum (normally only applies to Word and Excel documents, unless the system is configured otherwise).



Create new review as PDF

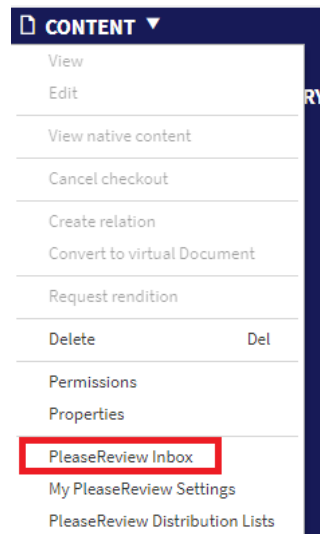
PleaseReview as PDF allows user to create a review from a Word document with PDF rendition. This can be done by browsing to Document List in the D2 Client interface, then select a Word document that has PDF rendition and version permission on so that it is highlighted. Now right-click on the document and click on the "PleaseReview as PDF" context menu as shown below, which will open a new browser window and launch the PleaseReview new review wizard.



Follow through the PleaseReview new review wizard as you normally would. Once the steps are performed, start the review then close the PleaseReview browser window.

Validate PleaseReview Inbox

In the D2 Client, navigate to **CONTENT** > **PleaseReview Inbox** which will open a new browser tab to PleaseReview Inbox and you should automatically be authenticated to PleaseReview via Documentum. Select the "REVIEWS I OWN" tab to show the review you have just created in the previous step. Then click "Enter" as shown below:



my reviews

REVIEWS I'M IN REVIEWS I OWN SEARCH FOR REVIEWS RECYCLE BIN TEMPLATES

Review status is Not started In progress Closed Completed

Include: All workgroups

[refresh](#)

DUE DATE ▾	REVIEW TITLE	STATUS	DETAILS	REVIEW
30 Dec 2022 11:45 PM	Sample Clinical Trial Report testing	In Progress	Select	Enter
30 Dec 2022 11:45 PM	Sample policy document testing	In Progress	Select	Enter

Page Size << < 1 > >> 1 - 2 of 2 reviews

[printable view](#)

The review should open in the standard PleaseReview interface in a new browser tab, at which point you should again not be prompted to login. Now close the review browser tab by clicking on the "Exit review" button from within the review interface.

Step not required
 Step Completed
 Step Failed

Date and Signature:

Validate new document version check-in from PleaseReview

In the PleaseReview Inbox browser tab, find the review you have created in section Create new review. Then click "Select", it should open in a new browser tab to the review control panel page. Proceed to review closeout page to update the review to Closed status, then select a check-in option from the drop-down list and then click the "Go" or "Complete" button for document check-in to Documentum.

review closeout - Sample policy document testing

review details

TITLE	Sample policy document testing
DESCRIPTION	
STATUS	Closed (15 Dec 2022 12:26 PM)
END DATE	30 Dec 2022 11:45 PM
OPEN COMMENTS	0

actions

Send reconciliation emails	Sends each participant an email notifying the review is closed and includes a link to the reconciliation report.
Re-open review	Re-opens a review so that all participants can make more comments. Invitations and reminders will not be re-generated.

download documents with comments marked as tracked changes

Make all the meanings the same as the first one Select Comments

FILE NAME	TITLE	DETAILS	MEANING
Sample policy document.docx	Sample policy document	Check in as a major revision Check in as a minor revision Check in as a new minor version and then re-lock the document Cancel checkout Do nothing Download View report Check in as the same revision Check in as a branch revision Check in as a new major revision and then re-lock the document	Review Owner Go

Download all documents Complete Back

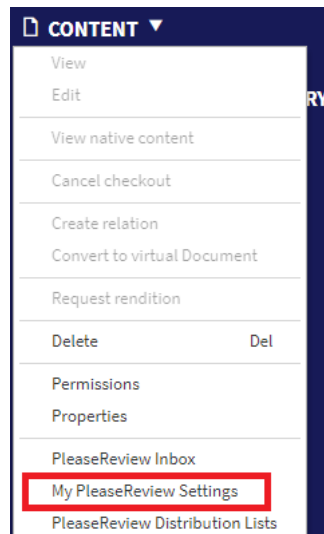
Now close the review closeout and PleaseReview Inbox browser tab. In the D2 Client interface, browse to Document List and refresh the Document List widget, then find the document that you just checked-in. The document should now be unlocked with a new document version updated accordingly.

Step not required Step Completed Step Failed

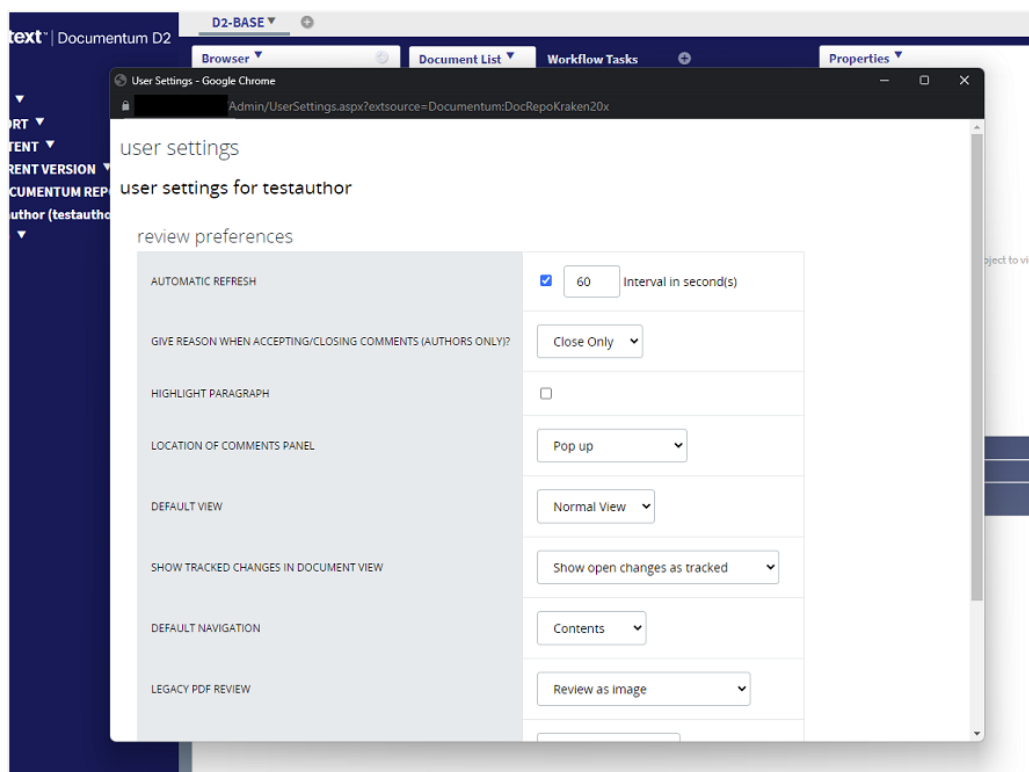
Date and Signature:

Validate My PleaseReview Settings

My PleaseReview Settings allows PleaseReview users to change their personal preferences. This functionality can be accessed by navigating to **CONTENT > My PleaseReview Settings**:



This will open the user settings page in a new browser window:



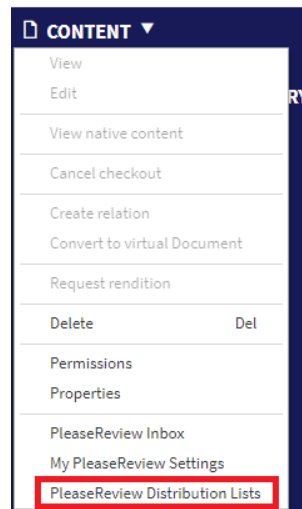
Any changes applied should show a "Settings Saved Successfully" message on the page. Now close the My PleaseReview Settings browser window.

Step not required Step Completed Step Failed

Date and Signature:

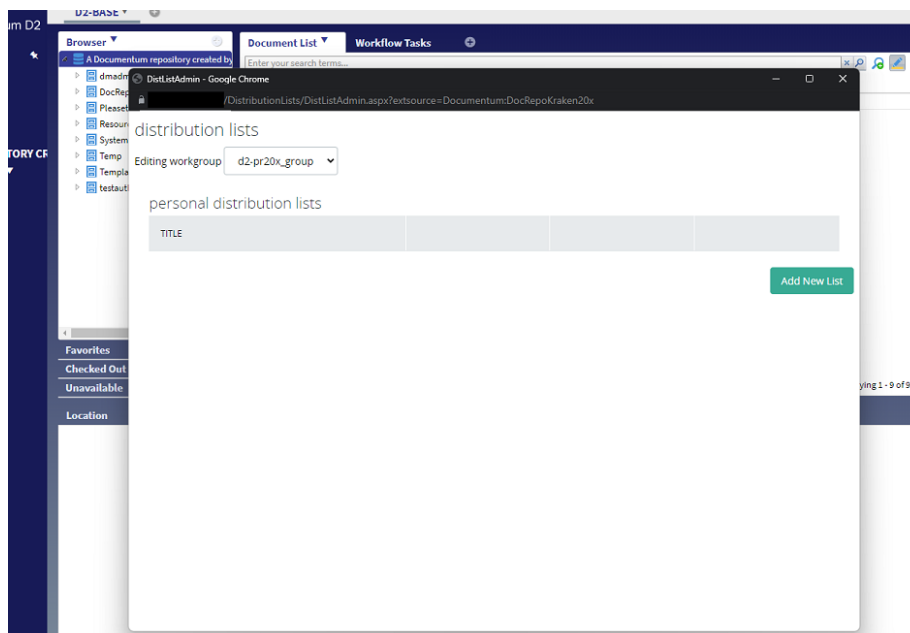
Validate PleaseReview Distribution Lists

PleaseReview Distribution Lists allows review owners to manage personal distribution lists. Shared distribution lists are created and managed by Workgroup Administrators. This functionality can be accessed by navigating to `CONTENT > PleaseReview Distribution Lists`:



Users without Author privileges will not see “PleaseReview Distribution Lists” in the menu.

This will open the distribution lists page in a new browser window:



Any changes applied should be reflected in the distribution lists page. Now close the PleaseReview Distribution Lists browser window.

Next, logout of D2 Client.

Step not required Step Completed Step Failed

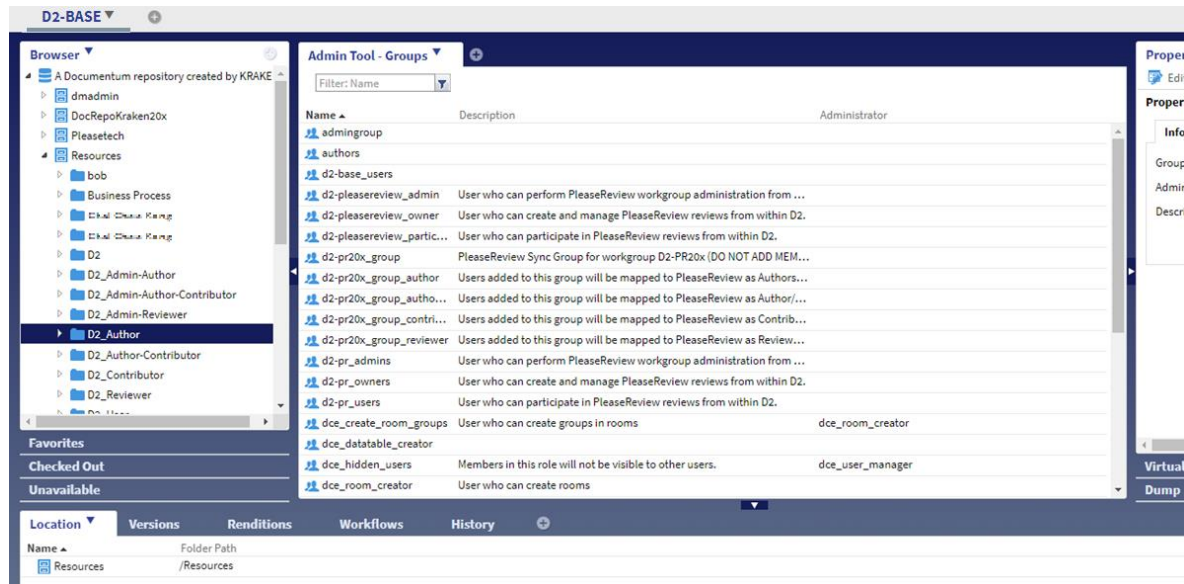
Date and Signature:

Validate PleaseReview Workgroup Administration

PleaseReview Workgroup Administration is only available to users with the correct permissions. This page allows Admin users to edit the members of PleaseReview Workgroups. Access to this functionality requires the users to be in specific groups within D2 and to have PleaseReview permissions set manually.

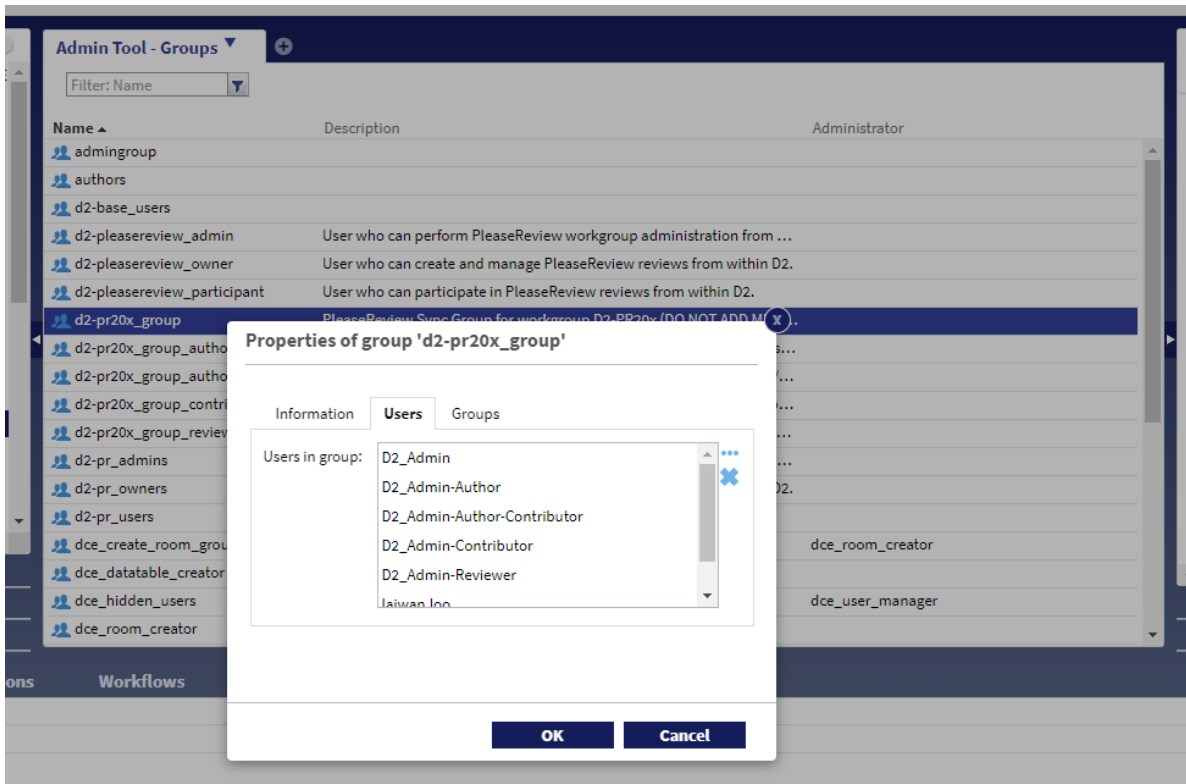
Grant appropriate privileges and permissions

To make the Administration functionality accessible to a user, log into D2 Client as an Admin user with Superuser privileges and open the "Admin Tool - Groups" widget.



In section Groups for locked workgroups, you will have created a set of groups for your PleaseReview users. If you have previously added your intended administration user(s) to any of these groups, please remove them.

You will now need to add your user(s) to the top-level group. For example, if the top-level group is called "sales_group", add your administration user(s) to this group. If you also require these users to be able to create or participate in reviews, the "d2-pleasereview_owner" role or if you require them to just participate in reviews, the "d2-pleasereview_participant" role.



All the D2-base configuration changes have now been made and as a result the Admin Tool - Groups can now be closed.

You should now log onto the PleaseReview system as an administrative user and re-sync the group "sales_group" (from the example). Remember that no other sub groups should be synchronized to PleaseReview, only the top level group.

As you have added your administration user(s) to the top-level group, those user(s) will NOT be granted any PleaseReview privileges, other than the default. You will need to make these grants manually, ensuring the users have one of the Admin privileges – for example, Admin-Author.

If you also require these users to be able to create or participate in reviews, they will need one of the extended privileges – for example Admin-Author-Contributor.

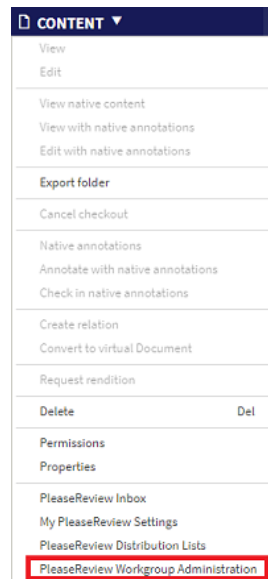
Step not required Step Completed Step Failed

Date and Signature:

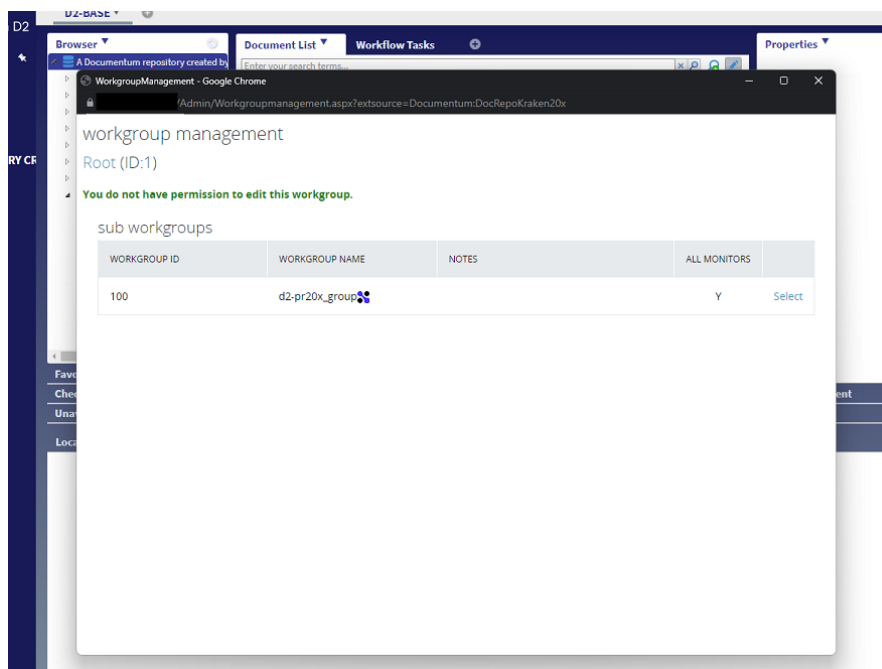
How to access the new Administration functionality

At this point, the new administration functionality will be accessible to the users specified. To begin, log into D2 Client as one of the administrative users.

To administer workgroups, navigate to **CONTENT > PleaseReview Workgroup Administration**:



This will open the workgroup management page in a new browser window:



Any changes applied should be reflected on the page. Now close the **PleaseReview Workgroup Administration** browser window and logout of D2 Client.

Step not required Step Completed Step Failed

Date and Signature:

Appendix A

Features not supported

This section lists any PleaseReview features, which are not supported when using PleaseReview in Documentum D2 Client:

- The PleaseReview groups "admin only", "monitor only", "reviewer-delegator" and "contributor-delegator", should not be assigned to D2 users.
- It is not possible to embed the actual document review interface within the D2 Client application; it can only be used as a "pop-out" new browser window.
- The profile tab of the 'My settings' page is not displayed in D2 integrations as the data displayed on this page is not relevant.

Known limitations

This section lists any known limitations of using PleaseReview via the D2 Client UI. Where appropriate, details of suitable workarounds are shown as well.

- If a user exists as an author in one or more than one workgroup, they will need to be assigned to the "d2-pleasereview_owner" role which will in turn give them access to the context menu to be able to create a 'New Review'. Should they also exist as a reviewer only member of another second workgroup they will still be able to select the option to create a review in this second workgroup, however in doing so they will encounter a permissions error. To avoid this, users should be trained only to select workgroups they have permission on.
- Documents' check-out/check-in updates from PleaseReview will not be automatically reflected in D2 Client. To get the latest updates, user would need to manually refresh the D2 Client page or the Document List widget.
- Authors can only create (checkout) reviews on documents they have version permission on.
- When transferring reviews, the new owner must have version permission on all the documents in the review, otherwise any subsequent check-ins will fail. As a result, users should be trained to be aware of this.
- If a user manually checks in a document they currently have in review, it will not be possible for the system to automatically check the review document back into D2 from the review closeout page. Instead, the user would need to manually save the document with review changes locally and then manually check it in as a new version.
- If a user is assigned to the "d2-pleasereview_owner" role, which will also give them access to the Admin functionality, they must also exist in PleaseReview as a user with Admin permissions.
- Wildcard searches using * are not supported through the D2 Client UI in the same way as within PleaseReview. Instead, no wildcards are needed in accordance with standard D2 Client functionality.