

# PleaseReview Veeva Vault Integration 6.1 (up to 6.1.11)

## Technical Release Note

### Overview

This document contains technical release notes relating to the PleaseReview 6.0 Veeva Vault integration, and notes for patching an existing 6.1 PleaseReview system integrated with Veeva Vault to the latest release.

PleaseReview Veeva Vault integration is now included with the PleaseReview Server so applying the 6.0.x PleaseReview Server patch will also patch the Veeva Vault Integration. If you are in any doubt, please contact support for guidance.

It is required that the PleaseReview system is integrated with Veeva Vault before patching starts and the integration is fully operational.

### Patching from a previous 6.1 version to the latest 6.1 version

This document describes any additional steps required when patching a PleaseReview Server integrated with Veeva Vault. At the bottom is a history of 6.1 releases and issues specific to Veeva Vault Integration that have been addressed.

To patch you should download the full server release from the download site. The patch process consists of simply unpacking the download to overwrite the existing server installation directory.

Note that if you are using any of our integrations and there is a new version of the integration available, you must update the integration at the same time as the server.

PleaseReview now includes all the released system connectors as part of the main download. Note that you are only permitted to use those system connectors and integrations your license permits you to. Check the individual release notes for any required system connector to ascertain what additional components may be required

### Before Installing

We recommend that you take a full backup of the PleaseReview installation directory before commencing the patch.

Before installing the patch, stop the TaraService from the services control panel. Note that it is not necessary to stop IIS but the web application will automatically restart (and all users will be disconnected) when the patch is installed.

Also stop any copies of AdminClient.exe. You may need to use Windows Task Manager and select "Show processes from all users" to make sure there are no instances of any of the following processes running:

- TaraService.exe
- AdminClient.exe

## Updating the Vault Configuration

If you are using PleaseReview in “Vault-centric mode”, copy the contents of the **directory** from the `config>EmailTemplates\VeevaVault.template` into `runtime\config>EmailTemplates\VeevaVault`, overwriting existing files if prompted. Then if the file `veevavaultserver.xsl` doesn't already exist in the directory `\config>EmailTemplates\VeevaVault\`, rename the file `veevavaultserver.xsl.template` to `veevavaultserver.xsl`. Then edit the file and populate the Vault URL to be used in the email templates, as per the instructions in section 6.2 of the document “PleaseReview v6.0 Veeva Vault Installation Guide.pdf”. Note – This step is not required if you are only using “PleaseReview-centric” mode.

Update your “`..\config\VeevaVaultLogin.xml`” file to include the following changes:

- For each `<VeevaVaultServer>` in your `VeevaVaultLogin.xml` file
  - Search for the section `<VaultUISettings>`
  - After the `<HelpUrl>` entry, add the two new entries `<AddExternalParticipants>true</AddExternalParticipants>` and `<DefaultSendNotifyEmails>>false</DefaultSendNotifyEmails>`.  
The contents of the file should now look something like:

```
<HelpUrl>Help/VVHelp.htm</HelpUrl>
<AddExternalParticipants>true</AddExternalParticipants>
<DefaultSendNotifyEmails>true</DefaultSendNotifyEmails>
</VaultUISettings>
```

- The new setting `<AddExternalParticipants>` controls whether or not the option to add external participants is displayed in the summary screen for advanced reviews. By default, this is displayed, however if you do not want them displayed, `true` should be replaced with `false`, i.e. `<AddExternalParticipants>>false</AddExternalParticipants>`
- The new setting `<DefaultSendNotifyEmails>` controls whether notification emails from PleaseReview are sent to Vault review participants for advanced reviews created from within the Vault UI. By default, these emails are enabled, however if you would like them disabled, `true` should be replaced with `false`, i.e. `<DefaultSendNotifyEmails>>false</DefaultSendNotifyEmails>`
- After the `<RoleContributor>` entry, add the 3 new entries `<RoleSuperContributor>pleasereview_super_contributor__c</RoleSuperContributor>`, `<RoleAuthorContributor>pleasereview_author_contributor__c</RoleAuthorContributor>` and `<RoleViewer>pleasereview_viewer__c</RoleViewer>`.  
The contents of the file should now look something like:

```
<RoleContributor>pleasereview_contributor__c</RoleContributor>
<RoleSuperContributor>pleasereview_super_contributor__c</RoleSuperContributor>
<RoleAuthorContributor>pleasereview_author_contributor__c</RoleAuthorContributor>
<RoleViewer>pleasereview_viewer__c</RoleViewer>
<ActionCancelPRLLabel>Cancel PleaseReview</ActionCancelPRLLabel>
```

- After the `<ParamReviewers>` entry, add the 3 new entries `<ParamSuperContributors>pleaseReviewSuperContributor</ParamSuperContributors>`,

- <ParamAuthorContributors>pleaseReviewAuthorContributor</ParamAuthorContributors> and
  - <ParamViewers>pleaseReviewViewer</ParamViewers>.
- The contents of the file should now look something like:

```
<ParamReviewers>pleaseReviewReviewer</ParamReviewers>
<ParamSuperContributors>pleaseReviewSuperContributor</ParamSuperContributors>
<ParamAuthorContributors>pleaseReviewAuthorContributor</ParamAuthorContributors>
<ParamViewers>pleaseReviewViewer</ParamViewers>
<StateInitial>Draft</StateInitial>
```

Replace your “.\config\systemconnectors.xml” file, by renaming it to “systemconnectors\_v5.2.xml” and then rename “systemconnectors.xml.veeva” to “systemconnectors.xml”. Then update the “systemconnectors.xml” file to include one <LoginMethod> element for each Vault configured in your “VeevaVaultLogin.xml” file, as per the instructions in section 2.1.9 of the document “PleaseReview v6.0 Veeva Vault Installation Guide.pdf”.

## After Installing

Don't forget to restart TaraService and TaraWeb after the patching steps have been carried out.

Step not required     Step Completed     Step Failed  
Date and Signature:

## Pre Configuring Veeva Vault UI

There are several optional configuration changes that you will need to decide if you wish to make prior to configuring the Vault. This section lists them up front so you can make sure you have all the necessary information to hand before you proceed with the configuration itself.

### The User Type(s) which can be used on Advanced reviews from within the Vault UI

From v6.0 you can customise what types of users you want to be able to add to reviews for advanced reviews from within the Veeva Vault UI. These will appear on the Prepare Advanced PleaseReview action screen. Please note - you must have at least one user type.

The user types that are now available are:

- Super-Contributor (New)
- Author-Contributor (New)
- Author (Present in v5.2)
- Contributor (Present in v5.2)
- Reviewer (Present in v5.2)
- Viewer (New)

Please record the user types you wish to use.

## Configuring Veeva Vault UI

This section outlines the configuration changes that will need to be carried out within the Veeva Vault admin screens by a Vault administrator.

Note – A majority of the configuration changes detailed in this section are Document Lifecycle specific. In the 6.0 installation guide all lifecycle changes were made to the PleaseReview lifecycle, however it was possible to add them to any other lifecycle if desired. If in your original installation an alternative Lifecycle was used, the same should be done now. The examples in the documentation assume you will be using the PleaseReview Lifecycle.

### New PleaseReview Application and Lifecycle Roles

A number of new Application and Lifecycle Roles should be created as per the instructions in the document "PleaseReview v6.0 Veeva Vault Installation Guide.pdf", by carrying out the steps in the following sections:

- 4.3.5.6 - Adding Application and Lifecycle Role "PleaseReview Super-Contributor"
- 4.3.5.7 - Adding Application and Lifecycle Role "PleaseReview Author-Contributor"
- 4.3.5.8 - Adding Application and Lifecycle Role "PleaseReview Viewer"

### Lifecycle Roles Security Settings

Security settings for each Lifecycle state must be set for each of the new Lifecycle Roles created in section 0 (i.e. "PleaseReview Author-Contributor", "PleaseReview Super-Contributor" and "PleaseReview Viewer"), by updating the settings to match those shown in the following sections of the document "PleaseReview v6.0 Veeva Vault Installation Guide.pdf". These security settings can be found towards the end of each of the following sections:

- 4.3.5.9 - Setting Security for Initial Lifecycle State "Draft"
- Note: If an alternative initial lifecycle state has been configured, these settings should be applied to that state instead.
- 4.3.5.10 - Adding Lifecycle State "Ready for PleaseReview"
- 4.3.5.11 - Adding Lifecycle State "In Create PleaseReview"
- 4.3.5.12 - Adding Lifecycle State "In PleaseReview"

### Edit "Prepare Advance PleaseReview" Workflow (Optional)

If you plan to customize the types of users you want to be able to add to advance reviews for advanced reviews from within the Veeva Vault UI, this section must be carried out, using the values recorded in section **Error! Reference source not found.** Otherwise proceed to section 0.

**Warning – Before updating the following workflows, we recommend that any documents in the states "Ready for PleaseReview" are returned to their initial state by performing a "Cancel PleaseReview" and that any documents in the state "In Create PleaseReview" are deleted by the review owners from within the Review Summary page.**

#### "Prepare Advance PleaseReview" – Start Workflow

Go to the Vault Admin screens, click on the `Configuration` tab and then select `Document Lifecycles`.

Click on `PleaseReview Lifecycle` document lifecycle, and then select the `Workflows` tab. Next click the `Prepare Advanced PleaseReview` workflow followed by the `start` step. Then click on the `edit` link in the `Always... Display` section, as shown below:

Start 

Step Details
Edit

**Label** Start

**Name** start\_\_v

**Description**

**Type** Start Workflow

**Next Steps** Change State to "Ready for PleaseReview"


---

Display Options

**Always...**

**Display:**

- Instructions: Please provide the fields to start an advanced PleaseReview review for \${docName}
- Next State Entry Fields: Ready for PleaseReview
- "PleaseReview Author(s)" User Control (Multiple)
- "PleaseReview Contributor(s)" User Control (Multiple)
- "PleaseReview Reviewer(s)" User Control (Multiple)
- "PleaseReview Due Date" Date Control



**or with these conditions...**

If YES, then display:	If NO, then display:
Not Defined	Not Defined
<a href="#">edit</a>	<a href="#">edit</a>

Now edit the user controls, so you have one for each user type required, as recorded in section **Error! Reference source not found.** Details of the fields to be populated can be found in the "PleaseReview v6.0 Veeva Vault Installation Guide.pdf", section 4.3.5.14 - Adding Lifecycle Workflow "Prepare Advanced PleaseReview".

### “Prepare Advanced PleaseReview” – Optional Tasks

Click on `Prepare Advanced PleaseReview` again in the breadcrumb trail.

Using the Workflow Steps editor, one `optional/hidden` tasks will then need to be created for each of the required user type. Details of how to do this can be found at the end of section 4.3.5.14 - Adding Lifecycle Workflow "Prepare Advanced PleaseReview" in the "PleaseReview v6.0 Veeva Vault Installation Guide.pdf".

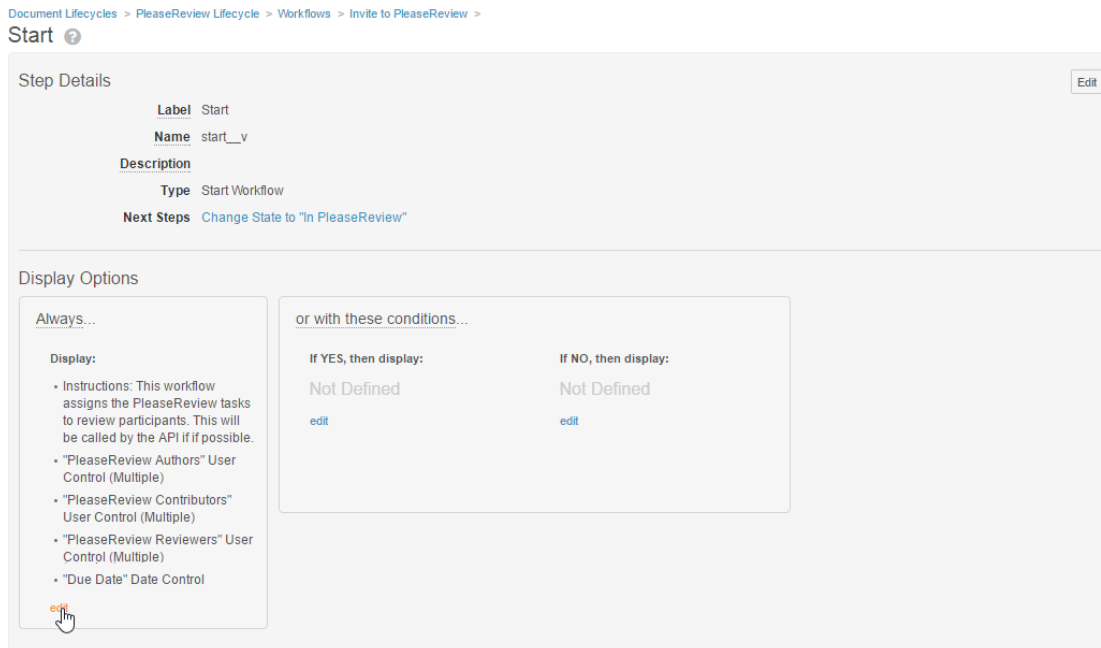
Once these changes have been made the workflow `Status` will now be set to `Editing` in the workflow details section. Click the link `Make configuration active` to change the `Status` to `Active`.

## Edit “Invite to PleaseReview” Workflow

The workflow changes outlined in this section must be carried out, even if you didn’t customize the user types in section 0.

### “Invite to PleaseReview” – Start Workflow

Click on the `Invite to PleaseReview` followed by the `start` step. Then click on the `edit` link in the `Always... Display` section, as shown below:



Now edit the user controls, to add 3 new user types. To add each user type, click on the add control ‘+’ icon, then enter the Control Label and Assign to Role values as per the below table, with all other values must keeping the defaults:

Control Label	Assign to Role
PleaseReview Super-Contributors	PleaseReview Super-Contributor
PleaseReview Author-Contributors	PleaseReview Author-Contributor
PleaseReview Viewers	PleaseReview Viewer

The new controls should appear as follows:

Allow workflow initiator to select any or every user

User Control (Multiple) ▾ - +

**Control Label\*** PleaseReview Author-Contributors

**Assign to Role\*** PleaseReview Author-Contributor ▾

Default users from sharing settings

Replace existing users in role

**Add Participants to Other Document Roles**

**Ways to assign tasks**

Every user listed will be assigned the task

Any user listed can complete the task

Allow workflow initiator to select any or every user

User Control (Multiple) ▾ - +

**Control Label\*** PleaseReview Super-Contributors

**Assign to Role\*** PleaseReview Super-Contributor ▾

Default users from sharing settings

Replace existing users in role

**Add Participants to Other Document Roles**

**Ways to assign tasks**

Every user listed will be assigned the task

Any user listed can complete the task

Allow workflow initiator to select any or every user

User Control (Multiple) ▾ - +

**Control Label\*** PleaseReview Viewers

**Assign to Role\*** PleaseReview Viewer ▾

Default users from sharing settings

Replace existing users in role

**Add Participants to Other Document Roles**

**Ways to assign tasks**

Every user listed will be assigned the task

Any user listed can complete the task

Allow workflow initiator to select any or every user

Date Control ▾ - +

**Control Label\*** Due Date

**Date Attribute**

Set workflow date

Set workflow due date

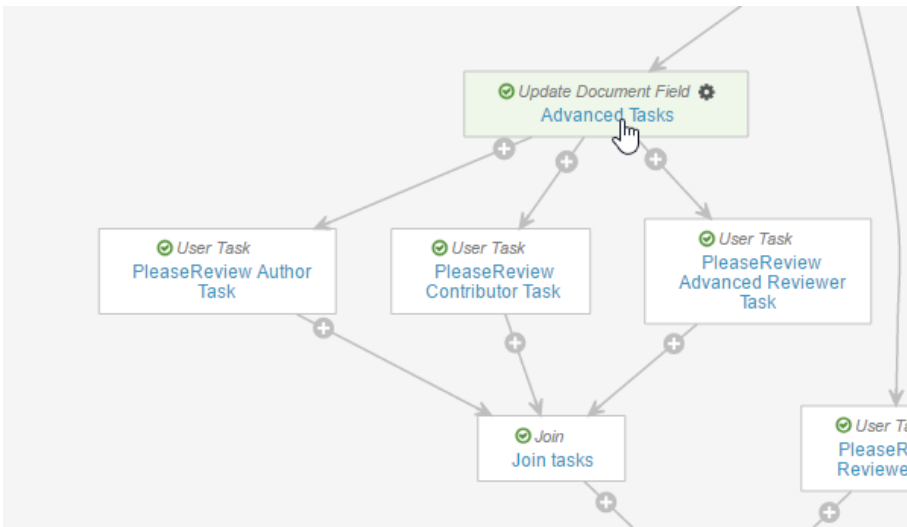
Set document date field PleaseReview Complete Date ▾

Cancel Save

Now press "Save" to apply the changes.

## “Invite to PleaseReview” – Advanced Tasks

Click on the `Invite to PleaseReview` link in the breadcrumb trail, and then the `Advanced Tasks` step, as shown:



Then click `Edit` and create 3 new `Next Steps` by clicking on the `Create Step` button, as shown:

[Document Lifecycles](#) > [PleaseReview Lifecycle](#) > [Workflows](#) > [Invite to PleaseReview](#) >

### Advanced Tasks ?

Step Details

**Label\***

**Name** advanced\_tasks\_\_c

**Description**

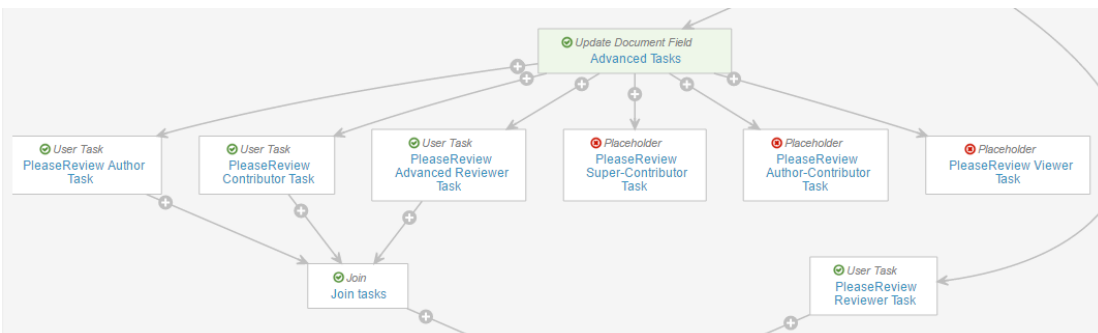
**Type\*** Update Document Field

**Next Steps**

- PleaseReview Author Task ✕
- PleaseReview Contributor Task ✕
- PleaseReview Advanced Reviewer Task ✕

The 3 steps should be called `PleaseReview Super-Contributor Task`, `PleaseReview Author-Contributor Task` and `PleaseReview Viewer Task`.

Then press `Save`, so the tasks appear as:



Now click on the first of the 3 user type steps `PleaseReview Super-Contributor`, then press `Edit` and amend the Step details to match those shown below:

Notes:

- The `Description` field will always be "Choose complete if you have finished the PleaseReview for ``${docName}``";
- The `Type` field should be set to "User Tasks";
- The `Next Steps` field will always be "Join Tasks";
- The `Task Name` field will always be "Complete a PleaseReview for ``${docName}``";
- The `Send Task To` is assigned to the user types corresponding to the role type used in `Label` e.g. for `Label = "PleaseReview Super-Contributor Task"`, the `Send Task To = "PleaseReview Super-Contributor"`;
- All other fields shown take the values as per the image below;
- Fields not shown take the default values.

### Step Details

**Label\***

**Name**

**Description\***

**Type\***

**Next Steps**

---

### User Task Options

**Task Name\***

**Send Task To\***

**Add Task Assignee to Role\***

**Due Date**

**Email Template For "Every user"**

**Email Template For "Any user"**

**Allow task to be optional**

**Allow cancel task**

**Allow reassign task**

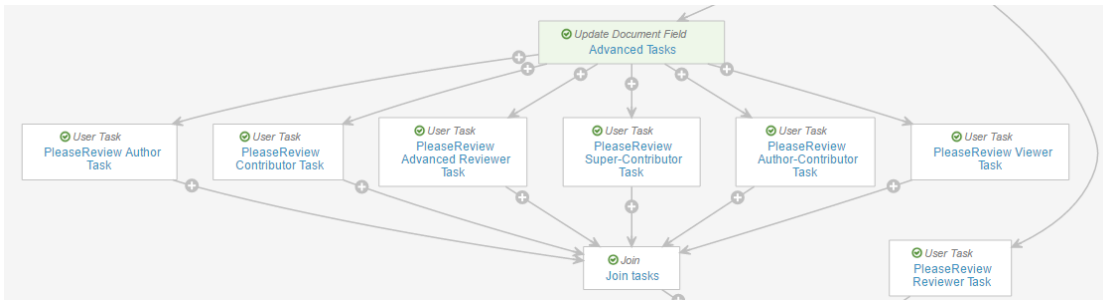
**Display in workflow history**

**Do not allow workflow owner to receive this task**

Then press the `save` button which takes you back to the `Invite to PleaseReview` workflow page.

Repeat the above steps for the `PleaseReview Author-Contributor Task`, using all the same values except for the `Send Task To`, which should be "`PleaseReview Author-Contributor`".

Next repeat the same steps for the PleaseReview Viewer Task, using all the same values except for the Send Task To, which should be "PleaseReview **Viewer**", so the workflow appears as:



Once these changes have been made the workflow Status will now be set to Editing in the workflow details section. Click the link Make configuration active to change the Status to Active.

## Edit PleaseReview Help within Vault

This step is only required if your Vault Menu is configured to use PleaseReview help.

In the Vault Admin screens, click on the Settings tab. Then under Vault Settings, select Help Settings and press Edit.

In Message Text box look for the text

"http://support.pleasetech.com/online\_help/veeva/5.2/Help/VVHelp.htm" and replace it with the text "[[YourPleaseReviewBaseURL]]/VeevaVaultSystemConnectorWeb/Help/VVHelp.htm", changing the value [[YourPleaseReviewBaseURL]] to use your base PleaseReview URL, e.g. https://yourcompany.pleasereview.net.

Now press OK, followed by Save.

Step not required     Step Completed     Step Failed  
Date and Signature:

## PleaseReview 6.1 patch release history

Version	Release Date	Summary of patch
6.1.9	1 Nov 2017	Fixed problem in Veeva integration when the document name contains angle brackets
6.1.11	28 Feb 2020	Fixed Veeva PR inbox login security breach