

PleaseReview Veeva Vault Integration 6.2 (up to 6.2.8) Technical Release Note

1 Overview

This document contains technical release notes relating to the PleaseReview 6.2 Veeva Vault integration, and notes for patching an existing 6.2 PleaseReview system integrated with Veeva Vault to the latest release.

PleaseReview Server 6.2.x is required to apply this patch. If you are in any doubt, please contact PleaseTech support for guidance.

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

2 Patching from version 6.2.x to the latest 6.2 version

This document describes how to patch a 6.2.x installation of PleaseReview Veeva Vault integration to the latest 6.2 release. At the bottom is a history of 6.2 releases.

To patch you should download the full Veeva release from the download site. The patch process consists of 1) unpacking the download to overwrite the existing server installation directory, 2) updating the Vault configuration files and 3) updating the Veeva Vault configuration.

3 Before Installing

We recommend that you take a full backup of both the PleaseReview installation directory and database 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

4 Updating the Vault Configuration

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 <DefaultSendNotifyEmails> entry, add the one new entry <AttachReconReport>true</AttachReconReport>

The contents of the file should now look something like:

```
<DefaultSendNotifyEmails>true</DefaultSendNotifyEmails>  
<AttachReconReport>true</AttachReconReport>  
</VaultUISettings>
```

The new setting `<AttachReconReport>` controls availability of the option to automatically add the reconciliation report during review close out. By default, this is displayed. However, if you do not want this displayed, `true` should be replaced with `false`, i.e. `<AttachReconReport>false</AttachReconReport>`

- After the `<ParamDueDate>` entry, add the new entry `<ParamDueDateAdvanced>pleasereviewDueDate</ParamDueDateAdvanced>`,
The contents of the file should now look something like:

```
<ParamDueDate>dueDate</ParamDueDate>
<ParamDueDateAdvanced>pleasereviewDueDate</ParamDueDateAdvanced>
<ParamAuthors>pleaseReviewAuthor</ParamAuthors>
```

- After the `<ActionFinishPRLLabel>` entry, add the new entry `<ActionPrepareAdvancedReviewLabel>Prepare Advanced PleaseReview</ ActionPrepareAdvancedReviewLabel>`,
The contents of the file should now look something like:

```
<ActionFinishPRLLabel>Finish PleaseReview</ActionFinishPRLLabel>
<ActionPrepareAdvancedReviewLabel>Prepare Advanced
PleaseReview</ActionPrepareAdvancedReviewLabel>
<FieldType>pleasereview_type__c</FieldType>
```

- Before the `<VaultUISettings>` section, add the following 2 settings which control the session keep alive :

```
<KeepAliveDelay>10</KeepAliveDelay>
<KeepAliveUrl>/v10.0/metadata/objects</KeepAliveUrl>
```

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 v6.2 Veeva Vault Installation Guide.pdf"`.

5 After Installing

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

6 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 6.2 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.

6.1 Edit "Draft" State User Action (Optional)

If you plan to create reviews from Vault binders then this user action will require editing.

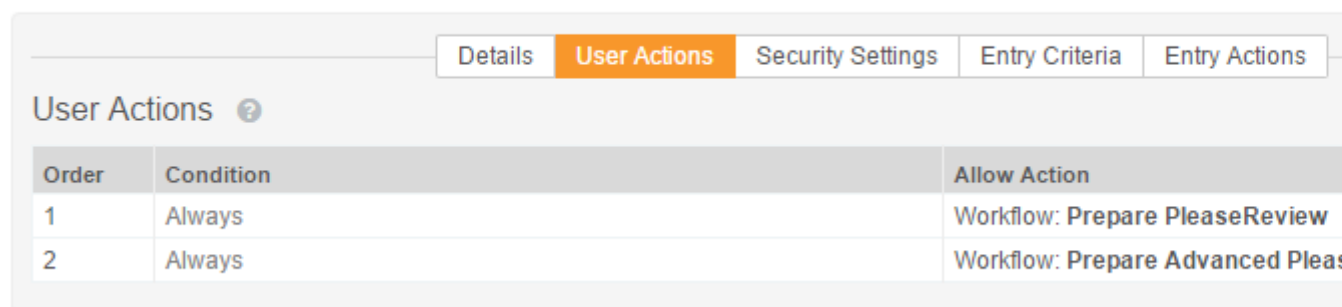
6.1.1 "PleaseReview Lifecycle" – "Draft" state user actions

Go to the Vault Admin screens, click on the Configuration tab and then select Document Lifecycles from the left-hand menu.

Click on PleaseReview Lifecycle document lifecycle, and then select the States tab. Next click the Draft state followed by the User Actions tab. Then click on the Edit link, as shown below:

[Document Lifecycles](#) > [PleaseReview Lifecycle](#) > [States](#) >

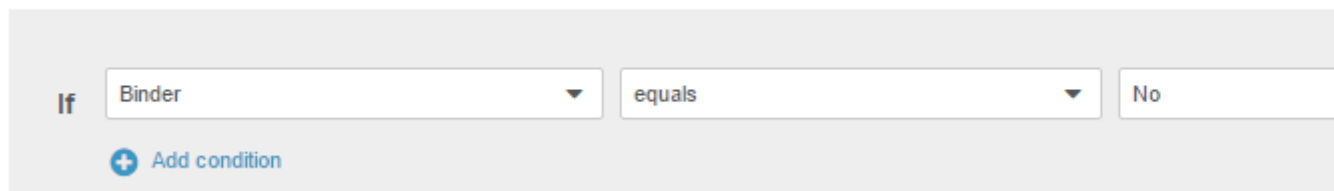
Draft



Order	Condition	Allow Action
1	Always	Workflow: Prepare PleaseReview
2	Always	Workflow: Prepare Advanced Pleas

The rules in place already need to be changed to be "Perform with conditions" instead of "Always". The only condition needed is "If Binder equals No".

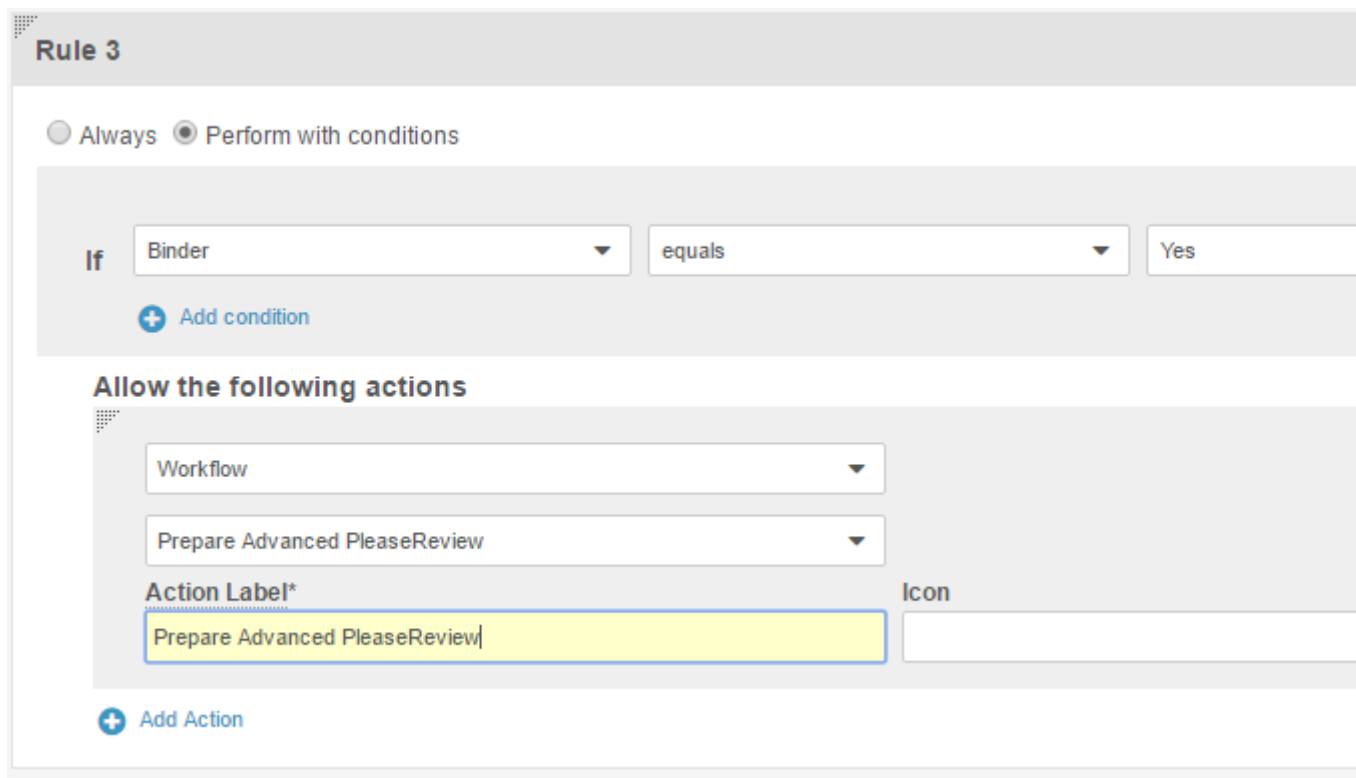
Always Perform with conditions



If equals

[+ Add condition](#)

A third rule needs to be added with the following parameters. This will enable binders to be entered as an advanced review:



Rule 3

Always Perform with conditions

If equals

[+ Add condition](#)

Allow the following actions

Action Label*	Icon
<input type="text" value="Prepare Advanced PleaseReview"/>	<input type="text"/>

[+ Add Action](#)

Click on Save.

6.1.2 "Custom Actions" – Edit custom actions URL

Click on Custom Actions in the left-hand menu. Select "Start PleaseReview" then on the Edit button on the right-hand side.

Append the following to the current URL setting:

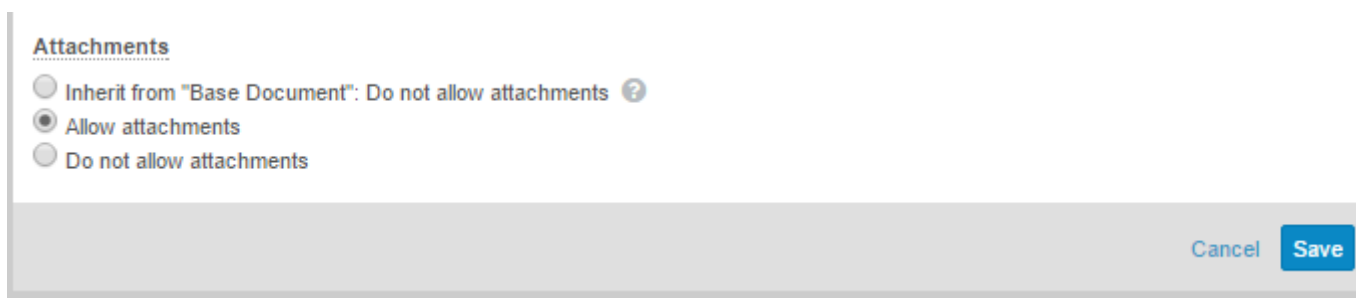
```
&isBinder=${Document.binder__v}
```

Click on the Validate button to ensure it is valid then click on Save on the right-hand side.

6.2 Document Types – Enable attachments

Click on Document Types in the left-hand menu of the Admin Configuration screen and select Edit Details under the Actions Menu of the desired Document Type.

Under the General tab at the bottom of the options, select the "Allow attachments" option and click on Save in the bottom right.



Attachments

Inherit from "Base Document": Do not allow attachments ?

Allow attachments

Do not allow attachments

[Cancel](#) [Save](#)

7 PleaseReview 6.2 Veeva Vault integration patch release history

Version	Release Date	Summary of patch
6.2.1	23 Aug 2017	Initial 6.2 Veeva Vault integration release; Control Panel in Vault UI not displaying subteams Add binder reviews from within the Vault UI Automatically upload the reconciliation report to Vault on review closeout Display Safari Session Blocking Message in Vault UI Veeva file selector slow after adding 10+ document Add Participants Status to Vault UI Review Control Panel Allow participants to be added to a review after it has been started.
6.2.3	18 Dec 2017	Short recon report can now be added when the review is completed (Veeva Vault specific change) Link to native PleaseReview now available for reviewers as well as authors (Veeva Vault specific change) Delegation can be turned off (core server, but relevant to Veeva Vault integrations)
6.2.5	23 Feb 2018	Veeva session keep alive
6.2.8	25 Jul 2018	Fixed issue where deleting a review from the Veeva integration can cause a null reference exception