



**PleaseReview
Version 6.3
Content Server Integration
Installation Guide**

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1 Introduction

1.1 Overview

This document contains instructions on integrating PleaseReview with Content Server, known as the OpenText PleaseReview for Content Server by PleaseTech.

This integration is provided by the PleaseReview Content Server System connector and an optional integration into the Content Server web UI. Without the UI Integration installed, the connector works in "PleaseReview-centric" mode – users can log in to PleaseReview using their Content Server credentials and select documents to review from the Content Server repository.

It is assumed that Content Server is already installed and working and that you are installing PleaseReview and the Content Server connector at the same time, although it is also possible to install the connector into an existing PleaseReview installation.

1.2 Scope

This document covers PleaseReview 6.3 which integrates with LiveLink 9.7.1, Content Server 10.x and Content Server 16.x.

If you are upgrading or patching PleaseReview then contact PleaseReview support to make sure that your Content Server versions are supported.

This document only covers aspects which are specific to the integration of PleaseReview with Content Server and does not cover general PleaseReview or Content Server concepts which are the subject of separate manuals.

1.3 Skills Required

In addition to the skills required for installing PleaseReview (see the PleaseReview installation and admin guide for more details), you will need to be familiar with basic Content Server concepts and be aware of configuration details of the Content Server repository which will be integrated with PleaseReview.

1.4 Overview of the installation process

The Integration consists of one download for the UI Integration (usually called `PleaseReview_Content_Server_UI_xxx.zip`). Note that only one version of the UI integration is created and it will work with Livelink 9.7.1, Content Server 10.x and 16.x. The files required for the System Connector are now included as part of the PleaseReview Server Install.

You should follow the standard PleaseReview installation guide until the point where you are directed to install the system connector. This is described below in sections 2 and 3.

Once the Content Server system connector is fully configured and operational, the Content Server UI integration can then be installed as described in section 4.

2 Installing the Content Server System Connector

2.1 Renaming sample files

The System Connector files are now included as part of the PleaseReview Server install. There is no longer a requirement to move files into your PleaseReview home directory as this will already have been done. All that is required is to rename and edit the sample configuration files.

NOTE: If you need to configure your PleaseReview install to multiple different OpenText Content Servers then contact support for assistance

The following steps are required to configure the Content Server System Connector in the installed PleaseReview application:

<ul style="list-style-type: none"> • In the Runtime/config directory, remove the .livelink extension from the systemconnectors.xml.livelink file so the filename reads systemconnectors.xml. Editing instructions are below. • In the Runtime/config directory, remove the .template extension from the LivelinkLogin.xml.template file so the filename reads LivelinkLogin.xml. Editing instructions are below. • In the Runtime/config directory, find the Livelink.template directory beneath EmailTemplates.template. Copy this Livelink.template directory to the EmailTemplates directory and remove the .template suffix • In the Runtime/bin directory in the main installation of PleaseReview, remove the .livelink extension from the TaraService.exe.config.livelink file so the filename reads TaraService.exe.config. Editing instructions are below. 	<input type="checkbox"/> Step not required <input type="checkbox"/> Step Completed <input type="checkbox"/> Step Failed Date and Signature:
---	--

Note: There should not already be a systemconnectors.xml file in the runtime/config directory unless you are using two or more system connectors in the same PleaseReview installation. If this is the case you will need to merge the contents – please contact PleaseTech technical support for further information.

2.2 Connecting to Content Server

There are two options for connecting PleaseReview to Content Server.

- 1) Opentext Content Server Web Services
- 2) LAPI

If you are using OpenText Content Server 10.0 or later then you can use OpenText Content Server Web Services – this is the preferred method, and for

Content Server 16.x it is the ONLY method that will work. In this case do NOT install LAPI.

If you are using OpenText Livelink 9.7.1 or earlier then you MUST use LAPI – this is the only option. You can also use this option against Content Server 10 but future versions of PleaseReview will drop support for LAPI so the use of LAPI is not a long term solution.

2.2.1 Supported connection methods

The following table shows the supported connection methods for each version of the OpenText Livelink/Content Server product.

	9.7.1	10.0	10.5	16.0	16.2
LAPI	Supported	Not recommended	Not recommended	Not supported	Not supported
CWS	Not supported	Supported	Supported	Supported	Supported

2.2.2 Upgrading and patching from earlier versions of PleaseReview

If you are upgrading or patching PleaseReview then you should look to move from LAPI to OpenText Content Server Web Services. This has long term support from both OpenText and PleaseTech and also removes some architectural constraints allowing PleaseReview to process much larger documents.

If you do this then you should remove LAPI from the server if no other applications require it. Also remember to remove any LAPI DLLs from the runtime/bin and taraweb/bin directories if they have been manually copied into them.

Note that the old version of the LivelinkLogin.xml file is NOT compatible with the new methods. You MUST merge your existing configuration with the new configuration file format. If you are unsure or you have multiple Livelink/Content servers configured in PleaseReview then please contact support for advice.

You will also need to make sure that you change the IIS web application pool's advanced settings used by PleaseReview to set the "Enable 32bit applications" to FALSE. If you have used the corflags utility on the taraservice.exe and adminclient.exe to force those applications to run as 32 bit, then this will NOT need to be done after the upgrade as you will have done before.

Step not required
 Step Completed
 Step Failed

Date and Signature:

2.3 Using OpenText Content Server Web Services (CWS)

There is nothing to install on the PleaseReview server if you are using the OpenText Content Server Web Services (CWS). CWS is installed and configured on the Content Server itself. The only piece of information required is the URL that the Content Server Web Services are published on. This is typically <http://OTSERVERNAME/CWS> but may vary by site. Check with your local Content Server administration team.

If the PleaseReview system is only going to be configured against one Content Server URL then the changes are detailed below. If the PleaseReview system is going to be configured against more than one Content Server system, then contact PleaseTech support for assistance with the configuration files.

2.3.1 Constructing the CONTENTSERVERHOST

When editing the web.config and TaraService.exe.config files references are made to the `[[CONTENTSERVERHOST]]`

This is a reference to the host name (or fully qualified domain name) of the Content Server system so it is excluding any parameters or paths.

For example, if the URL to the Content Server application is

<http://vm-cs105/otcs/livelink.exe>

Then the `[[CONTENTSERVERHOST]]` referred to below will be vm-cs105

To test you have got the URL correct to the web services add `/cws/Authentication.svc` so using the example above the URL would be:

<http://vm-cs105/cws/Authentication.svc>

If you go to that URL then you will see a default page titled "Authentication Service". If you see anything else then check the URL.

Using the example URL above the text below

`address=http://[[CONTENTSERVERHOST]]/cws/Authentication.svc`

now becomes

`address=http://vm-cs105/cws/Authentication.svc`

Note that `[[]]` markers are removed.

2.3.2 Editing the PleaseReview web.config file

Locate the web.config file inside the taraweb directory of the main PleaseReview installation and find the line:

```
<add key="Tara.XMLRPC.MaxThreadCount" value="0"/>
```

Change the value from "0" to "4".

This is used to stop PleaseReview deadlocking the Content Server server in the event of heavy load. This parameter controls the maximum number of Content Server requests that PleaseReview will make at any one time and should be one less than the number of Content Server threads.

In the same file locate the `</runtime>` marker and below that, just **before** the `</configuration>` marker, paste in the following text.

```

<system.serviceModel>
  <bindings>
    <basicHttpBinding>
      <binding name="BasicHttpBinding_Authentication"
maxReceivedMessageSize="131072000" sendTimeout="00:10:00">
        <readerQuotas maxDepth="64000000" maxStringContentLength="64000000"
maxArrayLength="64000000" maxBytesPerRead="64000000" />
      </binding>
      <binding name="BasicHttpBinding_Collaboration"
maxReceivedMessageSize="131072000" sendTimeout="00:10:00">
        <readerQuotas maxDepth="64000000" maxStringContentLength="64000000"
maxArrayLength="64000000" maxBytesPerRead="64000000" />
      </binding>
      <binding name="BasicHttpBinding_ContentService" messageEncoding="Mtom"
maxReceivedMessageSize="131072000" sendTimeout="00:10:00">
        <readerQuotas maxDepth="64000000" maxStringContentLength="64000000"
maxArrayLength="64000000" maxBytesPerRead="64000000" />
      </binding>
      <binding name="BasicHttpBinding_DocumentManagement"
maxReceivedMessageSize="131072000" sendTimeout="00:10:00">
        <readerQuotas maxDepth="64000000" maxStringContentLength="64000000"
maxArrayLength="64000000" maxBytesPerRead="64000000" />
      </binding>
      <binding name="BasicHttpBinding_MemberService"
maxReceivedMessageSize="131072000" sendTimeout="00:10:00">
        <readerQuotas maxDepth="64000000" maxStringContentLength="64000000"
maxArrayLength="64000000" maxBytesPerRead="64000000" />
      </binding>
      <binding name="BasicHttpBinding_WorkflowService"
maxReceivedMessageSize="131072000" sendTimeout="00:10:00">
        <readerQuotas maxDepth="64000000" maxStringContentLength="64000000"
maxArrayLength="64000000" maxBytesPerRead="64000000" />
      </binding>
    </basicHttpBinding>
  </bindings>
  <client>
    <endpoint address="http://[[CONTENTSERVERHOST]]/cws/Authentication.svc"
      binding="basicHttpBinding"
      bindingConfiguration="BasicHttpBinding_Authentication"
      contract="CWS.Authentication" name="BasicHttpBinding_Authentication"
    />
    <endpoint address="http://[[CONTENTSERVERHOST]]/cws/Collaboration.svc"
      binding="basicHttpBinding"
      bindingConfiguration="BasicHttpBinding_Collaboration"
      contract="CWS.Collaboration" name="BasicHttpBinding_Collaboration" />
    <endpoint address="http://[[CONTENTSERVERHOST]]/cws/ContentService.svc"
      binding="basicHttpBinding"
      bindingConfiguration="BasicHttpBinding_ContentService"
      contract="CWS.ContentService" name="BasicHttpBinding_ContentService"
    />
    <endpoint
      address="http://[[CONTENTSERVERHOST]]/cws/DocumentManagement.svc"
      binding="basicHttpBinding"
      bindingConfiguration="BasicHttpBinding_DocumentManagement"
      contract="CWS.DocumentManagement"
      name="BasicHttpBinding_DocumentManagement" />
    <endpoint address="http://[[CONTENTSERVERHOST]]/cws/MemberService.svc"
      binding="basicHttpBinding"
      bindingConfiguration="BasicHttpBinding_MemberService"
      contract="CWS.MemberService" name="BasicHttpBinding_MemberService" />
    <endpoint address="http://[[CONTENTSERVERHOST]]/cws/WorkflowService.svc"

```

```

        binding="basicHttpBinding"
bindingConfiguration="BasicHttpBinding_WorkflowService"
        contract="CWS.WorkflowService"
name="BasicHttpBinding_WorkflowService" />
    </client>
</system.serviceModel>

```

Now change all instances of `[[CONTENTSERVERHOST]]` to be the host name of the Content Server. See section 2.3.1 (Constructing the CONTENTSERVERHOST) on what to change the marker to.

<input type="checkbox"/> Step not required <input type="checkbox"/> Step Completed <input type="checkbox"/> Step Failed
Date and Signature:

2.3.3 Edit the TaraService.exe.config file

Rename the file runtime/bin/taraservice.exe.config.livelink to remove the .livelink suffix, and open in a text editor. If you already have a taraservice.exe.config file, contact PleaseTech support for assistance.

Now change all instances of `[[CONTENTSERVERHOST]]` to be the host name of the Content Server. See section 2.3.1 (Constructing the CONTENTSERVERHOST) on what to change the marker to.

<input type="checkbox"/> Step not required <input type="checkbox"/> Step Completed <input type="checkbox"/> Step Failed
Date and Signature:

2.3.4 Edit the systemconnectors.xml file

Open the file runtime/config/systemconnectors.config in a text editor.

Now change the instance of `[[CONTENTSERVERHOST]]` to be the host name of the Content Server. See section 2.3.1 (Constructing the CONTENTSERVERHOST) on what to change the marker to. Also change the instance of `[[FriendlyName]]` to the name you would like displayed in the Login Options dialogue.

<input type="checkbox"/> Step not required <input type="checkbox"/> Step Completed <input type="checkbox"/> Step Failed
Date and Signature:

2.3.5 Edit PleaseReview Content Server configuration files

The PleaseReview Content Server configuration is in the file LivelinkLogin.xml. This file defines what servers are accessible to PleaseReview and needs to be manually edited with a text editor or XML editor.

Editing the LivelinkLogin.XML file:

Normally when PleaseReview access the Content Server repository on behalf of a user, it uses that user's credentials as supplied to PleaseReview to connect to Content Server. However, when PleaseReview itself (or the PleaseReview system administrator) needs to list Content Server users and groups, it uses a specific Content Server account which is configured in the LivelinkLogin.XML. The account must be a system administrator equivalent account as PleaseReview will need to invoke the Content Server impersonation API which only a system administrator can use. It is recommended that it is a user who has no rights other than to view users and groups.

Open the file and search for "[[[". This is used to mark values that need to be manually replaced. Replace each marker with its value from the following table.

[[Content ServerName]]	The name of the Content Server server that this user is in – This CANNOT be changed once users have been mapped. Note that if Content Server Directory Services are being used with NTLM for single sign-on this must be the Windows domain name with which the users will log onto with their workstations. See section 2.7 (Working with Content Server Directory Services and NTLM) for more information on this topic. If you aren't using Content Server Directory Services then you just use the server name if there is only one server, or the Windows domain name if there is more than one.
[[Display Name]]	The name of the server that user will see (e.g. My Corporate Content Server Server etc)
[[UserName]]	The user name that PleaseReview will login into Content Server with.
[[Password]]	The password for the [[UserName]]. This is encrypted using the password encoder. See section 5 (Using the password encoder) on how to do this.

In the same file locate the </DocTypeMapping> marker and below that, just **before** the <DefaultRole>Reviewer</DefaultRole> marker, paste in the following text.

```
<ExcludedTypes>
  <string>url</string>
  <string>channel</string>
  <string>news</string>
</ExcludedTypes>
```

```
<AuthenticationServiceBindingName>BasicHttpBinding_Authentication</AuthenticationServiceBindingName>
<CollaborationServiceBindingName>BasicHttpBinding_Collaboration</CollaborationServiceBindingName>
<ContentServiceServiceBindingName>BasicHttpBinding_ContentService</ContentServiceServiceBindingName>
<DocumentManagementServiceBindingName>BasicHttpBinding_DocumentManagement</DocumentManagementServiceBindingName>
<MemberServiceServiceBindingName>BasicHttpBinding_MemberService</MemberServiceServiceBindingName>
<WorkflowServiceServiceBindingName>BasicHttpBinding_WorkflowService</WorkflowServiceServiceBindingName>
```

At the bottom of the file locate the </Servers> marker and below that, just **before** the </LivelinkServerList> marker, paste in the following text.

```
<UseLapi>>false</UseLapi>
```

Step not required Step Completed Step Failed

Date and Signature:

2.4 Installing the Opentext LAPI library

DO NOT CARRY OUT THE STEPS IN THIS SECTION IF YOU ARE USING THE WEB SERVICES

If you will require the use of LAPI to connect to Livelink the server that will run PleaseReview integrated with Livelink will require extra software to be installed and configured correctly on the PleaseReview server.

Only use this option you really need to use LAPI to support an older version of Livelink (9.7.1) or you cannot use OpenText Content Web Services for any reason.

You will need to install the correct pre-requisites for your operating system as detailed below **before** you install LAPI itself.

2.4.1 Installing LAPI pre-requisites on a 32-bit operating system

Use the link below

<http://www.microsoft.com/downloads/details.aspx?familyid=F72C74B3-ED0E-4AF8-AE63-2F0E42501BE1&displaylang=en>

2.4.2 Installing LAPI pre-requisites on a 64 bit operating system

Use the link below:

<http://www.microsoft.com/en-us/download/details.aspx?id=15468>

Important note on 64 bit Windows Server operating systems:

Please note that PleaseReview with Livelink enabled does not work if IIS is in 64 bit mode because it invokes LAPI which is 32 bit only. Please consult the PleaseReview Installation and Admin guide for instructions on how to configure IIS to run in 32 bit mode.

This means that the TaraService and AdminClient will need to be forced to run in 32bit mode and the PleaseReview IIS web application pool will need to have Enable 32bit apps set to true.

2.4.3 Installing the LAPI software from OpenText

It is required that the PleaseReview server has the Opentext LAPI 9.7.1 installed (regardless of which version of the Livelink server you have). If you have a previous version of LAPI installed such as LAPI 9.7.0 then this must be uninstalled first. This can be acquired from your Livelink account manager or from PleaseTech support. Opentext have indicated that PleaseTech is permitted to distribute the LAPI library with our software if required.

Note that this is **not** the same as the Livelink SDK which also has facilities for developing application modules for Opentext Content Server (Livelink). All that PleaseReview requires is the runtime library that allows third party applications to communicate with Livelink.

Ensure that the bin directory of the Opentext LAPI installation is in the system's path. The Opentext LAPI installation has instructions on how to do this. Note that the OpenText LAPI installer can do this automatically but the user account used for the installation must have local server administrator rights.

It is also necessary to do the following:

Copy the file LAPI_NETp.dll into the TaraWeb/bin directory and the copy the same file into the Runtime/bin directory.

The Opentext LAPI library also requires that Microsoft J# libraries for .NET 2.0 are installed as the LAPI .NET libraries require it.

2.4.4 Editing the PleaseReview web.config file

Locate the web.config file inside the taraweb directory of the main PleaseReview installation and find the line:

```
<add key="Tara.XMLRPC.MaxThreadCount" value="0"/>
```

Change the value from "0" to "4".

This is used to stop PleaseReview deadlocking the Livelink server in the event of heavy load. This parameter controls the maximum number of Livelink requests that PleaseReview will make at any one time and should be one less than the number of Livelink threads.

<input type="checkbox"/> Step not required <input type="checkbox"/> Step Completed <input type="checkbox"/> Step Failed
Date and Signature:

2.4.5 Edit PleaseReview Livelink configuration files

The PleaseReview Livelink configuration is in the file LivelinkLogin.xml. This file defines what servers are accessible to PleaseReview and needs to be manually edited with a text editor or XML editor.

Editing the LivelinkLogin.XML file:

Normally when PleaseReview access the Livelink repository on behalf of a user, it uses that user's credentials as supplied to PleaseReview to connect to Livelink. However, when PleaseReview itself (or the PleaseReview system administrator) needs to list Livelink users and groups, it uses a specific Livelink account which is configured in the LivelinkLogin.XML. The account must be a system administrator

equivalent account as PleaseReview will need to invoke the Livelink impersonation API which only a system administrator can use. It is recommended that it is a user who has no rights other than to view users and groups.

Open the file and search for "[[[". This is used to mark values that need to be manually replaced. Replace each marker with its value from the following table.

[[LivelinkName]]	The name of the Livelink server that this user is in – This CANNOT be changed once users have been mapped. Note that if Livelink Directory Services are being used with NTLM for single sign-on this must be the Windows domain name with which the users will log onto with their workstations. See section 2.7 (Working with Content Server Directory Services and NTLM) for more information on this topic. If you aren't using Livelink Directory Services then you just use the server name if there is only one server, or the Windows domain name if there is more than one.
[[Display Name]]	The name of the server that user will see (e.g. My Corporate Livelink Server etc)
[[Host]]	The name of the Livelink host – this must be directly accessible from the PleaseReview server (i.e. no proxies). Note that if a cluster of Livelink/Content Servers is deployed then this should point to one specific member/host of the cluster and not the load balanced IP address.
[[Port]]	The port the Livelink Server uses (normally 2099)
[[UserName]]	The user name that PleaseReview will login into Livelink with.
[[Password]]	The password for the [[UserName]]. This is encrypted using the password encoder. See section 5 (Using the password encoder) on how to do this.

<input type="checkbox"/> Step not required <input type="checkbox"/> Step Completed <input type="checkbox"/> Step Failed Date and Signature:
--

2.4.6 Edit the systemconnectors.xml file

Open the file runtime/config/systemconnectors.config in a text editor.

Now change the instance of [\[\[CONTENTSERVERHOST\]\]](#) to be the host name of the Content Server. See section 2.3.1 (Constructing the CONTENTSERVERHOST) on what to change the marker to. Also change the instance of [\[\[FriendlyName\]\]](#) to the name you would like displayed in the Login Options dialogue.

<input type="checkbox"/> Step not required <input type="checkbox"/> Step Completed <input type="checkbox"/> Step Failed

Date and Signature:

2.5 Further configuration changes

2.5.1 Changing how documents are handled

When PleaseReview needs to fetch a document from Content Server, it can either “check out” (i.e. reserve) the document which places a lock on it; or just “get” the content and not lock the source document; or offer the user a choice.

The default action (as shipped in the PleaseReview Content Server server) is that the user be given a choice to how they want to handle the document – either place a reservation on the document or just get a copy of the contents. A user cannot perform an action in PleaseReview they are would not be privileged enough to do in Content Server.

If you ALWAYS want documents to be “checked out” then change the default action to “checkout” as follows:

```
<DocTypeMapping>
  <DocTypeMapping>
    <DocType>default</DocType>
    <Action>checkout</Action>
  </DocTypeMapping>
</DocTypeMapping>
```

If you ALWAYS want documents to be “got” then change the default action from “checkout” as follows:

```
<DocTypeMapping>
  <DocTypeMapping>
    <DocType>default</DocType>
    <Action>get</Action>
  </DocTypeMapping>
</DocTypeMapping>
```

PleaseReview can only check out documents in Content Server on behalf of a user that the user would be able to check out themselves.

PleaseReview allows the administrator to configure that certain file extensions cannot be checked out. This overrides the DocTypeMapping settings above and is designed for stopping users trying to check out files that PleaseReview cannot check in (such as PowerPoint, JPG and PDF)

For example:

```
<AlwaysGet>
  <string>.PDF</string>
  <string>.PPT</string>
  <string>.PPTX</string>
  <string>.JPG</string>
  <string>.GIF</string>
  <string>.PNG</string>
</AlwaysGet>
```

PleaseReview will always get (not reserve) any documents with the above extensions. To add a new one just add another

`<string>.TXT</string>`

Before the `</AlwaysGet>` tag. Note that the file extension is not case sensitive and the "." Before the file extension is required.

<input type="checkbox"/> Step not required <input type="checkbox"/> Step Completed <input type="checkbox"/> Step Failed Date and Signature:
--

2.5.2 Changing how users are synchronised

By default when a user is added to PleaseReview they are added as a Reviewer which means they can only participate in reviews and cannot create new ones. In order to change this it is necessary to update the line that reads:

`<DefaultRole>Reviewer</DefaultRole>`

You can use any workgroup role that is valid in PleaseReview (i.e. that appears when you add a user to a workgroup manually). The system administrator user manual explains these roles.

Note that changing this may have implications for the licensed number of users. It is advised that the default setting be left as-is unless the license allows for all users to take on the role you are using.

PleaseReview also allows the way the user's name is displayed on the PleaseReview screens to be customised when it is imported from Content Server into PleaseReview. This is done by changing the following field:

`<UserNamingFormat>{0} {2}</UserNamingFormat>`

By default this setting will form the user name as FirstName LastName.

If you wanted LastName, FirstName MiddleInitial you would use:

`<UserNamingFormat>{2}, {0} {1}</UserNamingFormat>`

If neither the "FirstName" or the "LastName" fields are set in Content Server then the user's login name will be used instead and this setting will be ignored. This ensures that the user will always have a valid display name in PleaseReview.

The table below shows how the user's attributes in Content Server are mapped into these special naming formats:

Content Server field	PleaseReview field identifier
First Name	{0}
Middle Name	{1}
LastName	{2}
LoginName	{3}

Step not required Step Completed Step Failed

Date and Signature:

2.5.3 Changing how documents are checked in

PleaseReview ships by default with a list of options that are presented to the user when a document that has been checked out for use in PleaseReview can be checked in. This is controlled in the CheckInOptions section of the LivelinkLogin.xml file.

Content Server check in options	
1	Check in a document as a new version will check in the currently checked out document in as a new revision (for simple versioning) or a new minor revision for documents that are using advanced version control.
4	Removes the lock on the document in Liveink (un-reserves it).
6	Display the document using the currently selected document download settings
7	Display the reconciliation report for the document.
33	Do the same as option 1 and then re-lock the document

Options 6 and 7 should left alone. However if it is required that a user does not use PleaseReview to check back in documents then the following can be done:

```
<CheckinOptions>
  <CheckinOptions>
    <CheckinMode>4</CheckinMode>
    <Description>Unreserve document</Description>
  </CheckinOptions>
  <CheckinOptions>
    <CheckinMode>6</CheckinMode>
    <Description>Display Document</Description>
  </CheckinOptions>
  <CheckinOptions>
    <CheckinMode>7</CheckinMode>
    <Description>View report</Description>
  </CheckinOptions>
</CheckinOptions>
```

Note that the <Description> field can be changed to meet local naming requirements.

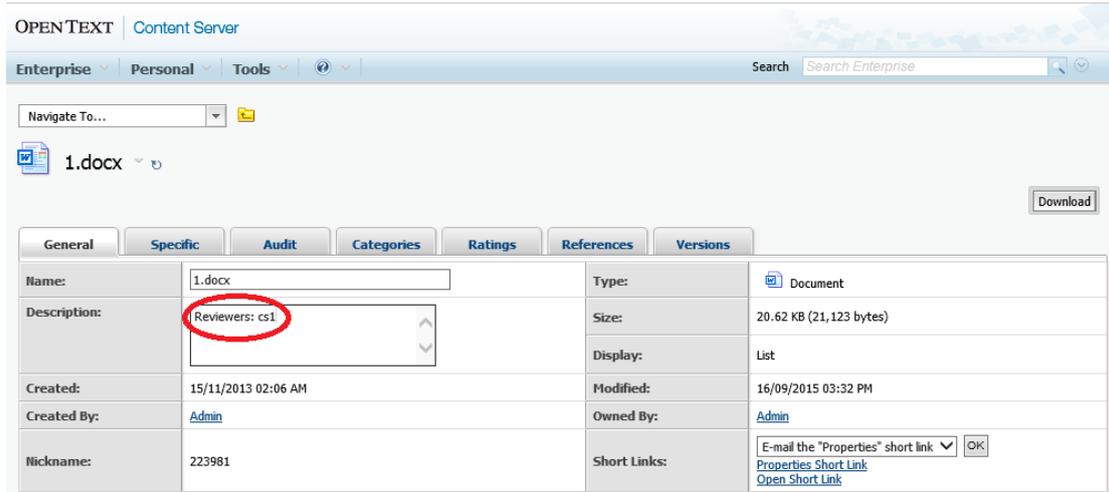
Step not required Step Completed Step Failed

Date and Signature:

2.5.4 Applying a check in comment

In order to show a document has been reviewed by PleaseReview a check in comment is automatically added to a document when it is checked in by PleaseReview. This gives traceability as PleaseReview checks the document in on the user's behalf and the user has no option to place a comment on the document upon check in. The check in description is stored on the checked in document as the newly checked in **version's** description in Content Server. This label is a simple list of the reviewer's user names that participated in the review prefixed the text between the CheckInComment markers.

For example this will display as follows in Content Server:



This setting is active by default. To turn it off change:

```
<CheckInComment>Reviewers:</CheckInComment>
```

To

```
<CheckInComment></CheckInComment>
```

Step not required
 Step Completed
 Step Failed

Date and Signature:

2.5.5 Enabling review pop-up

This setting is for use when PleaseReview is integrated into the Content Server user interface. It allows the user or system admin to choose that when a user clicks on the review title in the Content Server inbox whether the review is displayed as a popup window or embedded in the Content Server main window. The default behaviour is for the review to be displayed in a pop up window and allow the user to override the setting if they want to.

```
<EmbedReview>>false</EmbedReview>
```

To make embedded review the default

```
<EmbedReview>>true</EmbedReview>
```

To stop the user overriding the setting change:

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

To

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

Step not required Step Completed Step Failed

Date and Signature:

2.5.6 Ignoring certain Content Server objects

This setting controls what type of objects are hidden from the end user when they are using the PleaseReview Content Server file selector. These object types are not meaningful to add to a review as they have no real content so seeing them will confuse end users. By default the url, channel and news types are ignored

```
<ExcludedTypes>
  <string>url</string>
  <string>channel</string>
  <string>news</string>
</ExcludedTypes>
```

To add a new type to the list just add it before the </ExcludedTypes> marker like this:

```
<ExcludedTypes>
  <string>url</string>
  <string>channel</string>
  <string>news</string>
  <string>exampletype</string>
</ExcludedTypes>
```

From then on the user will not see any objects of the type "exampletype" in the PleaseReview Content Server file selector.

Step not required Step Completed Step Failed

Date and Signature:

2.6 Integrating PleaseReview notification emails and Content Server

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 Content Server user interface.

The PleaseReview Content Server integration includes additional email templates that provide the user with a link into Content Server rather than directly into PleaseReview.

To install these special email templates do the following:

- Copy the Config/EmailTemplates/Livelink directory from the unpacked zip file into the Runtime/config/EmailTemplates directory in the main installation of PleaseReview. There should now be a directory called Runtime/config/EmailTemplates/Livelink
- Edit the Runtime/config/EmailTemplates/Livelink/Livelinkserver.xml and replace [[LivelinkServerURL]] with the URL the users use to access Content Server. For example (on a Content Server server using IIS) it would be something like [http://myContent Serverserver/OTCS/livelink.exe](http://myContentServerserver/OTCS/livelink.exe)

Any user using PleaseReview and authenticated by Content Server will see these emails, but users who are not authenticated by Content Server will see the standard emails

2.7 Working with Content Server Directory Services and NTLM

PleaseReview has features in its integration with Content Server to allow users to be automatically logged into PleaseReview as the correct Content Server user when they use the PleaseReview native interface. You will need to get the NetBios short domain name(s) from the network administrator. The NetBios short domain name can often be found as the USERDOMAIN environment variable or by using the PleaseReview "prereq" tool.

If you have more than one domain then separate them in the list with a comma.

In the livelinklogin.xml file change

```
</Servers>
<UseLapi>>false</UseLapi>
</LivelinkServerList>
```

To:

```
</Servers>
<SupportedWindowsDomains>DOMAIN</SupportedWindowsDomains>
<UseLapi>>false</UseLapi>
</LivelinkServerList>
```

Where **DOMAIN** will be replaced with the NetBios short domain name.

2.7.1 Configuring IIS

The PleaseReview web application needs to be configured to support NTLM authentication, but this setting needs to be overridden for the "Services" sub-directory.

2.7.1.1 IIS 7.0 and 7.5 (Windows 2008 and later)

	<input type="checkbox"/> Step not required
--	--

<ul style="list-style-type: none">• Select the PleaseReview web application and double-click on the "Authentication" icon• Make sure "Windows Authentication" is enabled• If it is not enabled, right-click and select "Enable"• Make sure all others are disabled• Expand PleaseReview web application, select the "Services" sub-directory and double-click on the "Authentication" icon• Make sure "Anonymous Authentication" is enabled• If it is not enabled, right-click and select "Enable"• Right click on the "Anonymous Authentication" option and then select "Edit". Make sure that the "Application pool identity" is selected	<p><input type="checkbox"/> Step Completed</p> <p><input type="checkbox"/> Step Failed</p> <p>Date and Signature:</p>
--	---

3 Post connector installation activities

Once the connector is installed it will be necessary to do three follow up tasks:

1. Restart the TaraService and IIS
2. Test that the installation was successful;
3. Map users to PleaseReview from the Content Server repository so that Content Server users can log in to PleaseReview.

3.1 Testing the installation

Log into PleaseReview as the sysadmin user and select the "workgroup management" option under the admin menu.

Select "members" next to the Root workgroup and then click the "add user" button at the top of the page.

In the drop down list box select the login source that was added above i.e. not "PleaseReview database"). Enter a user name that you know exists in Content Server and click the "Go" button next to the user name field.

If the system has been configured correctly then the user's details will be displayed. Click the "Select" link next to user. This will pull the rest of the details up. Select the role this user will have (Review, Author or Admin) and then click "Save" to map them to PleaseReview. Note that this user can now log in to PleaseReview but their password will be verified against Content Server. PleaseReview does not store passwords for users mapped from system connectors.

Log out of PleaseReview as the sysadmin user. Click on the "Change" link (if available) and select from the list the login source that was added above. Enter the user name of password of the user just mapped across and hit login to log in as this user.

Since this was just a test, you should now log back in as sysadmin (you will need to click the "Change" link on the login page and select PleaseReview database), return to workgroup management screen and remove the new user from the Root workgroup.

If any of these steps fail check the taraweb.log file for errors.

3.2 Mapping users and groups

Before Content Server users can log into PleaseReview they must be mapped across (though they do not need to be done individually). See the PleaseReview system administrator user manual for details.

4 Content Server UI installation

4.1 Overview

This section describes the basic installation process, giving step-by-step instructions for getting a standard configuration up and running. For more advanced deployment scenarios (for instance a clustered/web farm implementation) contact your PleaseTech representative before installing.

Where third party components are used, you should normally use the latest released/stable version and apply service packs, security updates etc unless specific versions are required for Content Server. If there are specific aspects of your infrastructure which are unusual or which cause problems with other applications, you should discuss these with your PleaseTech representative prior to starting the implementation.

4.2 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.

4.2.1 PleaseReview

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

- The PleaseReview Content Server System Connector is installed and operational.
- Content Server users have been added to PleaseReview and can login
- Content Server users can add documents from Content Server into a PleaseReview review.

4.2.2 Content Server

At the time of writing the Content Server UI integration is tested on Microsoft Windows Server 2008 R2 and Windows Server 2012 R2. Please contact PleaseTech support if you want to run the UI integration on a UNIX platform.

Note that although the PleaseReview Content Server integration module mentions Content Server 10 in its directory name it is compatible with Livelink 9.7.1 and Content Server versions 10, 10.5, 16.0 and 16.2. There are no specific service pack requirements on any version of Content Server.

4.2.3 Upgrading the Content Server UI integration

If you currently have a previous version of the Content Server UI integration installed you must uninstall it before proceeding as in place upgrades are not supported.

4.3 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 to hand before you proceed with the installation itself.

4.3.1 The URL of the PleaseReview server

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

4.3.2 The names of the Content Server groups of users who will use PleaseReview

In order for the PleaseReview Content Server integration to decide who will be permitted to see the PleaseReview specific menu items and the PleaseReview inbox, you need to specify the names of one or more Content Server groups. Any user in one of those groups will be able to see the PleaseReview interface and other users will not.

Note that this is independent of any workgroup mapping within PleaseReview. However, it is possible to create these groups as "locked" workgroups in PleaseReview after being created in Content Server. In this way the members of the PleaseReview workgroup(s) will automatically be synchronized with the source Content Server group(s) by PleaseReview.

4.3.3 Locate the Content Server staging directory

All file system paths in this installation guide are relative to the location of the OpenText directory. This is normally:

C:\opentext

From now on this directory will be referred to as \opentext and all paths will be relative to it.

4.4 Generate access keys

In order for the Content Server integration to connect to the PleaseReview server, the server requires that any application communicating with it must be authenticated. This is done by sharing a key between the PleaseReview server and the Content Server integration. For security reasons this key is not embedded in either application and must be generated when the Content Server integration is installed. This section describes the process for obtaining this key.

4.4.1 Password generation worksheet

This worksheet provides a single place to record to the steps of the password generation.

Marker	Client name	Web service URL	Password	Encrypted password
[[TaraXMLRPCKey]]	Content Server integration	services/taraXMLRPC.ashx		

The best option is to generate an Excel workbook with similar column names and then copy and paste the password and encrypted password into the correct column. As the password can be quite long this will cut down on transcription errors.

4.4.2 Generating PleaseReview web services access keys

Start up the PleaseReview web interface and log in as sysadmin. Then under the "admin" menu click on the "trusted clients" option.

This will display a list of the current clients that this server trusts to use the web interface. It may be empty or just have a row for the Offline Client (if enabled)

Click on the "Add New" button:

add trusted client

Client Name	--- Select a predefined access key or define your own --- Livelink UI Integration
Web Service URL	services/TaraXMLRPC.ashx
IP Address (blank for any)	
Network mask	
Hashcode	

Generate Key

OK **Cancel**

And enter the data as shown.

Client Name	Content Server Integration
Web Services URL	services/taraxmlrpc.ashx
IP address/network mask	<p>These fields work together to limit the range of IP addresses from which the Content Server integration can connect to the PleaseReview server. Normally you should enter the IP address of the Content Server server and set the network mask to 255.255.255.255, or you can restrict it to a subnet by filling in the appropriate values.</p> <p>If you do not wish to restrict the IP address range, just leave these fields blank</p>

Now click on the "generate key" button:

add trusted client

Client Name	--- Select a predefined access key or define your own --- Livelink UI Integration
Web Service URL	services/TaraXMLRPC.ashx
IP Address (blank for any)	
Network mask	
Hashcode	<input checked="" type="radio"/> Generate a password and key together <input type="radio"/> Create a new key from the following password <input type="text"/>

Generate **Cancel**

The recommended procedure is to leave the option to generate a password and key together. To do this simply click the generate button.

However, if local security requirements dictate a format for passwords, click "Create a new key from the following password" and enter your chosen password into the box, then click the generate button.

add trusted client

Client Name	--- Select a predefined access key or define your own --- Livelink UI Integration
Web Service URL	services/TaraXMLRPC.ashx
IP Address (blank for any)	
Network mask	
Hashcode	cdff992bb44746addc60178f13eca93

Generate Key

The automatically generated password for the above key is:
 bcb4581d-19de-4370-b92c-ccb587b9d916
 You should record this password now as it cannot be re-generated.

OK **Cancel**

Password to record

Record the password above. This will be needed later. Do not use the hash code and password in the screenshot above as this is not secure!

<input type="checkbox"/> Step not required <input type="checkbox"/> Step Completed <input type="checkbox"/> Step Failed Date and Signature:
--

4.5 Installing the files

Extract the Content Server UI zip file into a temporary directory. Again we suggest you do not extract it onto the desktop. It will contain the following files:

- The user manual as a PDF file
- TaraWeb.zip
- ContentServer.zip

The user manual is not automatically made available to end users as part of the integration; if you want users to have access it, you should distribute this file as you see fit.

Extract the contents of the TaraWeb.zip file into the TaraWeb directory of the PleaseReview server installation to merge the contents into the directories already there. Overwrite any files that already exist.

Open up ContentServer.zip and extract the contents into \opentext\staging. Be sure to extract the zip files so the paths are intact.

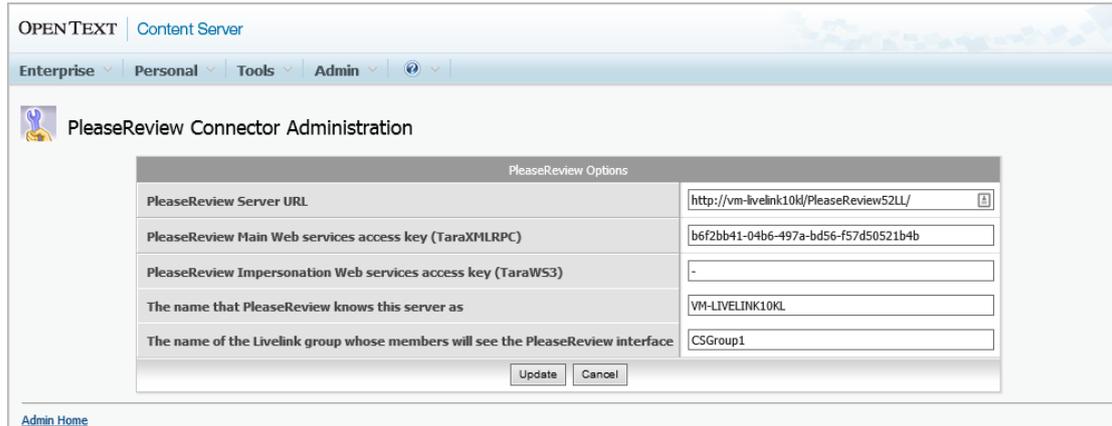
Using the Content Server Admin interface (<http://<MyLivelinkServer>/Livelink/Livelink.exe?func=admin.installModule>) install the PleaseReview module using the install module and restart Content Server as requested.

Step not required Step Completed Step Failed

Date and Signature:

4.6 Configuring the PleaseReview connection

In the Content Server admin interface there will now be a module configuration section marked as "PleaseReview Integration" with one link called "Administer PleaseReview Integration". Note that your values will be different!



Field name	Comments
PleaseReview Server URL	The PR server web interface URL – this must end in a /
PleaseReview Main Web services access key (TaraXMLRPC)	See above on how to generate this value. Note that this must be the automatically generated password, not the access key!
PleaseReview Impersonation Web services access key (TaraWS3)	This field is not used, just enter a – as in the screenshot
The name that PleaseReview knows this server as	This is the same as the <Name> value in the PleaseReview LivelinkLogin.xml configuration file
The name of the Content Server group(s) whose members will see the PleaseReview interface	If there is more than one group, separate them with commas but do not include any spaces (e.g. "a,b,c" rather than "a, b, c")

Step not required Step Completed Step Failed

Date and Signature:

4.7 Copying image files

As PleaseReview tightly integrates with Content Server it is necessary to copy some of the PleaseReview images files from the PleaseReview support directory (.\\module\\pleasereview_9_7_0\\support) into the main support directory

Copy the prmulti.gif and prmulti2.gif files into c:\\opentext\\support

Copy the 28prlogo.gif file into c:\\opentext\\support\\home

You may need to adjust these paths for your local installation.

4.8 Testing the installation

Log in to Content Server as a user who is a member of the group defined earlier (see section 4.3.2).

This user must also have been mapped into PleaseReview i.e. must be able to log in to PleaseReview using their Content Server credentials.

In the "Personal" menu an item called "My Reviews" will appear. Click on this to display your PleaseReview review inbox. Note that all your reviews will appear in there; not just ones created through the Content Server integration.

Next select a test Word document from a folder and select the "PleaseReview" button from the buttons above the file list. Follow the PleaseReview review creation wizard through as normal. Once this is complete, click "Done" and then click back on the PleaseReview inbox. Click on the review title (first column) to enter the review. The PleaseReview web interface will appear. You should not be asked to log in again at this point. Finish the review and the PleaseReview window will close. Now click on the PleaseReview icon in the inbox next to the review and verify that the review information is displayed correctly.

Step not required Step Completed Step Failed

Date and Signature:

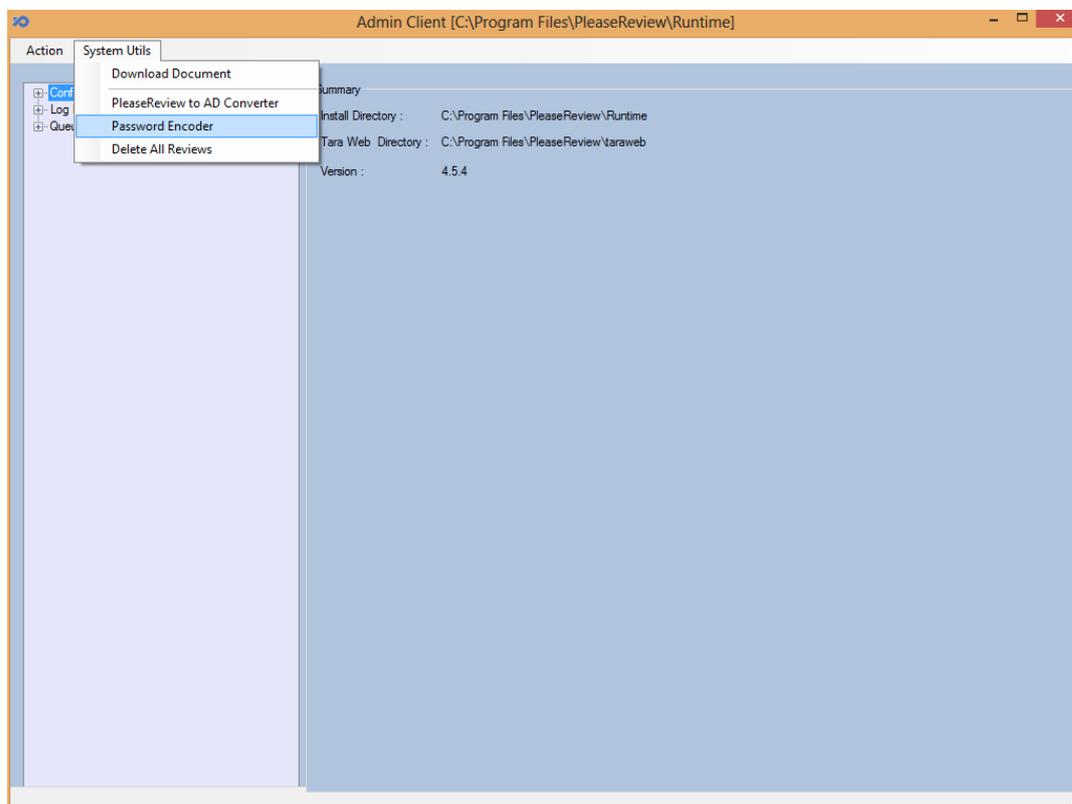
5 Using the password encoder

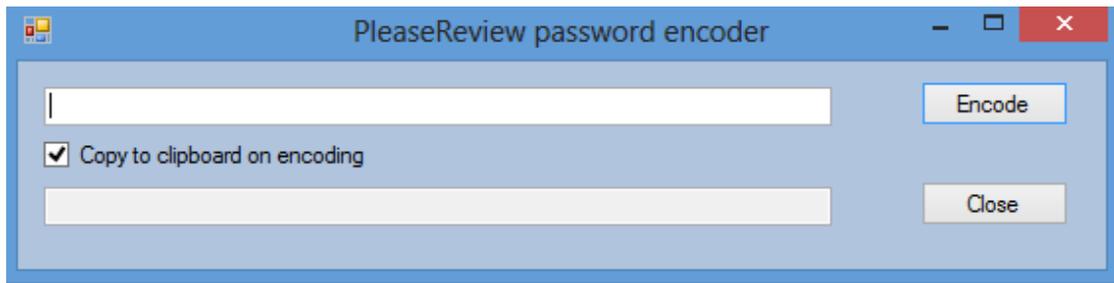
Passwords stored in the LivelinkLogin.xml file are stored in an encrypted format. The encryption is done by the password encoder utility which is part of the "Customer System Utilities" supplied as standard with PleaseReview server.

The password encoder uses Windows "protected storage" – a secure form of encryption which is locked to the machine on which the encryption is done. This means that the password encoder utility must always be run in a desktop session on the PleaseReview server (either directly or using Remote desktop or some such). The password encryption is not locked to a specific user account however; so it does not matter what user you log on to the server as when performing the encryption.

If you have a clustered solution with several physical servers, you will have to encrypt the password on each server separately.

In the PleaseReview runtime/bin directory, open AdminClient.exe and click System Utils and then click the Password Encoder button which will show the password encoder screen.





Enter the password in the top box and click encode. The encrypted password is shown in the bottom box (it will be wider than the field so it scrolls off the end) and has also been copied to the clipboard so you can paste it directly into the configuration file

6 Notices

All trade names, trademarks, and service marks are the rightful property of their respective Owners.