

PleaseReview Veeva Vault Integration 6.4 (up to 6.4.7)

Technical Release Note

Overview

This document contains technical release notes relating to the PleaseReview 6.4 Veeva Vault integration, and notes for patching an existing 6.4 PleaseReview system integrated with Veeva Vault to the latest release.

PleaseReview Veeva Vault integration is now included with the PleaseReview Server so applying the 6.4.x PleaseReview Server patch will also patch the Veeva Vault Integration. If you are in any doubt, please contact Ideagen 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 6.4 version to the latest 6.4 version

This document describes any additional steps required when patching a PleaseReview Server integrated with Veeva Vault. At the bottom is a history of 6.4 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

Veeva Vault Integration specific patching notes

With Server release 6.4.7 there are no specific changes required for an installation that includes Veeva Vault Integration.

However, if this is your first 6.4.x install and you are upgrading from an existing 6.3.x install, consult the 6.3 Veeva Vault Technical Release notes before you upgrade to ensure the configuration changes referenced in that document have been applied before upgrading.

For new installations, the extra configuration steps outlined in the 6.3 Veeva Vault Technical Release notes are included in the 6.4 Veeva Vault Installation Guide.

Installing the patch

To install, extract the PleaseReview server zip file into your existing PleaseReview installation directory.

It is important to extract the zip file at the correct directory level so that the files in the zip overwrite the existing ones. For instance, if PleaseReview is installed in c:\Program Files\PleaseTech\PleaseReview Server (so that the PleaseReview server directory contains subdirectories called Runtime and TaraWeb), you should right-click the zip, select 'extract all' and then browse to the "PleaseReview Server" directory. If Windows does not warn you about overwriting files then you have probably selected the wrong directory.

If you prefer, you can extract the zip file into a temporary location and then move the files into the PleaseReview installation directory. However, do not extract it onto the desktop or any other area of the file system which has limited file permissions, or the file permissions may be incorrect when the files are moved.

Step not required Step Completed Step Failed
Date and Signature:

After Installing

Don't forget to restart the TaraService after the files have been installed.

Step not required Step Completed Step Failed
Date and Signature:

PleaseReview 6.4 patch release history

Version	Release Date	Summary of patch
6.4.7	8 May 2020	Fixed Veeva PR inbox login potential security breach (PR-21484) Allowed Veeva integration to work with multiple document lifecycles instead of just one (PR-19875) Fixed Veeva binder participant assign incorrect in PleaseReview (PR-21844) Fixed recycle bin not display in Veeva Centric (PR-21436)