



Documentum Install & Config Guide

Version 7.2

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1 Introduction

1.1 Overview

This document contains instructions on integrating PleaseReview with the OpenText Documentum Server product (hereafter referred to simply as Documentum). This integration is provided by the PleaseReview Documentum System Connector.

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

You should follow the standard PleaseReview Installation and Administration Guide until the point where you are directed to install the system connector. **Note:** The Documentum System Connector is integrated into the main PleaseReview installation so there is no longer a separate download for this component.

However, the PleaseReview Documentum Remoting Layer (DRL) must still be downloaded as it is a separate application. **Note:** PleaseReview 6.6.7 and later supports Documentum version 7.2 up to 16.4 with the new Java DRL. The WCF DRL will still work for Documentum version 7.1 and earlier.

1.2 Scope

This document covers PleaseReview 7.2 which integrates with Documentum version 7.1 up to 16.4.

It only covers aspects which are specific to the integration of PleaseReview with Documentum and does not cover general PleaseReview or Documentum 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 Administration Guide for more details), you will need to be familiar with basic Documentum concepts and client-side installation and configuration (dmcli.ini etc.).

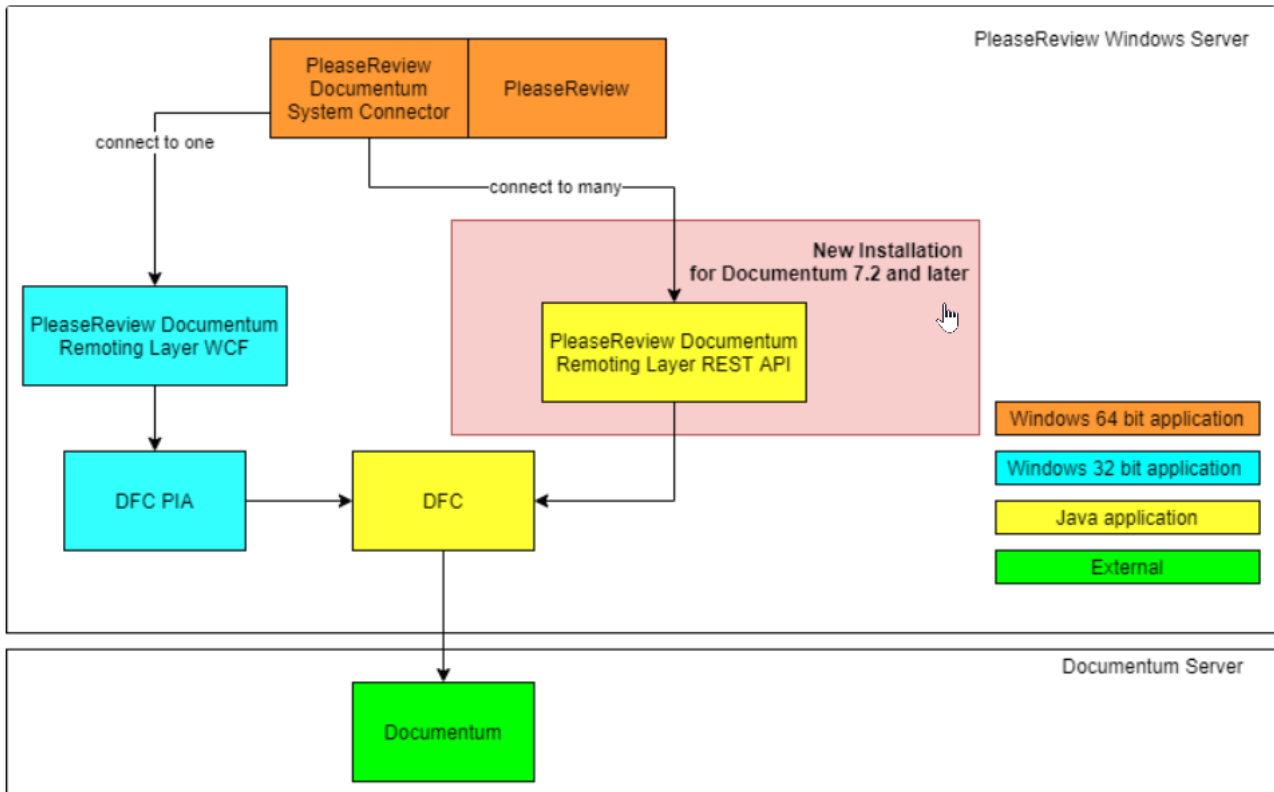
You will also need to be aware of the configuration details of the Documentum repository which will be integrated with PleaseReview.

1.4 Architecture of the connector

There are two parts to the PleaseReview Documentum connector:

- 1) The WCF DRL or Java DRL. They are responsible for talking to Documentum DFC and is a separate web application
- 2) The Documentum System Connector. This lives within the main PleaseReview application

The reason for having two separate components is that PleaseReview normally runs as a 64-bit process, but DFC can only run in 32-bit for DCMT 7.1 and earlier. DFC runs in 64-bit from DCTM 7.2 onward, however, this does not change the architecture of the connector and it still remains as two parts. The diagram below shows how the components talk to each other.



1.5 Note about 32-bit and 64-bit configurations for upgrading customers

Previous versions of the Documentum connector had only one component and this forced PleaseReview to run as a 32-bit process.

If you are upgrading from a version of the Documentum System Connector before version 5.0.12 and you are using PleaseReview with an Oracle database then you must take care at this point as you will be using the 32-bit Oracle client and its associated .NET database drivers.

If you wish to use the main PleaseReview in 64-bit mode to allow larger and more complex documents to be processed, then you will have to uninstall the Oracle 32-bit client and then re-install the Oracle 64-bit client (and then reboot).

Failure to match the "bitness" (32-bit or 64-bit) of the PleaseReview application to the Oracle client will mean that PleaseReview will NOT start. The table below lists the applications affected by this and their "bitness" requirements.

PleaseReview web application pool	PleaseReview service (TaraService)	PleaseReview admin client	Oracle client	Documentum Remoting Layer
32-bit	32-bit	32-bit	32-bit	32-bit (WCF)
64-bit	64-bit	64-bit	64-bit	32-bit (WCF) or 64-bit (Java)

No other combinations are supported.

As a result of the System Connectors being included in the main Server ZIP, there is now only a single additional zip file you need to download for the Documentum Remoting Layer, either WCF DRL or Java DRL. **Note:** The WCF DRL is for Documentum version 7.1 and earlier while the Java DRL is for Documentum version 7.2 and later.

2 Installing the Documentum Remoting Layer

This layer is the part of PleaseReview that talks to Documentum and thus it must run as a 32-bit (WCF DRL) or 64-bit (Java DRL) web application.

When you are given the software for PleaseReview, an additional .ZIP file called “PleaseReview_Documentum_RemotingLayer_[version].zip” or “PleaseReview_Documentum_JavaRemotingLayer_[version].zip” will be provided with Documentum specific utilities and files.

Unzip this file into a local directory on the server where you wish it to be installed. The following steps are required to install the WCF DRL or Java DRL into the installed PleaseReview application.

2.1 Installing WCF Documentum Remoting Layer

Follow these steps for Documentum version 7.1 and earlier. Refer 2.2 for Documentum 7.2 and later.

2.1.1 Installing the Remoting Layer software

<ul style="list-style-type: none"> • Create directory to hold the new web application. For example if the main PleaseReview server software is installed into C:\Program Files\PleaseReview • then create a directory called C:\Program Files\PleaseReview Documentum Remoting Layer 	<input type="checkbox"/> Step not required <input type="checkbox"/> Step Completed <input type="checkbox"/> Step Failed Date and Signature:
<ul style="list-style-type: none"> • Open the file PleaseReview_Documentum_RemotingLayer_[version].zip in your preferred unzip tool and extract the contents of the DocumentumRemotingLayer directory into this new directory 	<input type="checkbox"/> Step not required <input type="checkbox"/> Step Completed <input type="checkbox"/> Step Failed Date and Signature:

2.1.2 Setting file permissions

We need to grant certain file permissions to the process running the ASP.NET application pool. This is known as the ASP.NET Identity. The ASP.NET Identity is a member of local server group IIS_IUSRS. This group should not be a domain group so please ensure that you select the local machine and not the domain when finding accounts.

Ensure the ASP.NET Identity process has full permissions over the entire “\PleaseReview Documentum Remoting Layer\App_Data” directory tree. This can be done using Windows explorer as follows:

<ul style="list-style-type: none"> • Select the “App_Data” directory in “\PleaseReview Documentum Remoting Layer”. Right-click, and select Properties • Select the Security tab • Click Advanced • Click Add. If “Change permissions” button is shown, click on “Change permissions” then proceed to click Add • Click “Select a principal” • Type in the ASP.NET Identity (see above) • Click OK • Check “Allow” next to “Full Control” and OK. • Select “Replace all child object permissions with inheritable permissions from this object” • Click OK again 	<input type="checkbox"/> Step not required <input type="checkbox"/> Step Completed <input type="checkbox"/> Step Failed Date and Signature:
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2.1.3 Enabling WCF Activation

The WCF DRL requires Windows Communication Foundation Activation to be enabled on the machine.

<ul style="list-style-type: none"> • Start Server Manager • Select “Features” in the left-hand pane • Click “Add Features” • Expand “.Net Framework 4.5 Features” • Expand “WCF Activation” • Check the checkbox next to “HTTP Activation” • A dialog box will probably appear saying that other prerequisite features also need to be installed • Click “Add Required Features” • Click “Next” • Click “Install” • Click “Close” 	<input type="checkbox"/> Step not required <input type="checkbox"/> Step Completed <input type="checkbox"/> Step Failed Date and Signature:
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2.1.4 Configure IIS

2.1.4.1 IIS Application Pools

ASP.NET code running as part of an IIS web application executes inside the context of an Application Pool. You must create a new application pool for the PleaseReview Documentum Remoting Layer – do NOT re-use any existing application pools for this task.

- Start Internet Information Services (IIS) Manager
- Select Application Pools in the left hand pane
- To create a new application pool, select “Add Application Pool” in the right hand pane. Give the new application pool a name; select the framework version as 4.0.30319 and the Managed pipeline mode as Integrated. Then click OK
- Select the Application Pool you will use for the PleaseReview Documentum Remoting Layer and select recycling in the right hand pane
- Clear all the checkboxes, click Next and then click Finish
- Select Advanced Settings in the right hand pane
- Under process model, find the entry for Idle Time-out (minutes) and set the value to be 0.
- Under “Process model”, find the entry for LoadUserProfile and set the value to True
- Under “General”, find the entry for “Enable 32-bit applications” and set the value to True
- Click OK

Step not required

Step Completed

Step Failed

Date and Signature:

2.1.4.2 Configure IIS Virtual Roots

This procedure will create a virtual root called "DocumentumRemotingLayer" under the default web site.

<ul style="list-style-type: none"> • Start Internet Information Services (IIS) Manager • Expand Local Computer/Sites/Default Web Site • Right click, and select Add Application • Enter the alias DocumentumRemotingLayer • Select the application pool to use (see section 2.1.4.1) • Check the properties – ensure the .NET Framework is set to Version 4.0 • Under "Physical path" browse to the directory C:\Program Files\PleaseReview Documentum Remoting Layer • Click OK 	<input type="checkbox"/> Step not required <input type="checkbox"/> Step Completed <input type="checkbox"/> Step Failed Date and Signature:
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Note: It is not necessary to call the virtual application "DocumentumRemotingLayer" but if you do not do this, further configuration will be required – see section 3.1.1 for details.

2.1.4.3 Installing the Documentum Remoting Layer when PleaseReview uses HTTPS

In the standard configuration, PleaseReview server connects to the Documentum Remoting Layer using WCF activation over HTTP by making a connection to localhost port 80.

If you have configured PleaseReview to use only HTTPS then you probably have not bound the PleaseReview web site to port 80. However, if the Documentum Remoting Layer is in the same web site as PleaseReview then it will not be listening on port 80 and hence it will not be possible for PleaseReview to access the remoting layer.

In this event, our recommended solution is to enable port 80 for the web site and use Windows firewall to disallow connections to port 80 from outside the server as described below:

How to Disable Port 80 to Inbound Connections using the Windows Firewall

- Open the Windows Control Panel => Windows Firewall and click on "Advanced Settings"
- Select "Inbound Rules" from the left hand menu panel
- Select "New Rule" from the right hand menu panel
- Check the "Port" radio button in the main screen and press Next
- On the next screen, check the "TCP" radio button in the top part of the screen, and "Specific local ports" in the bottom. Add port 80 to the list and press Next
- On the next screen, check the "Block the connection" radio button and press next
- On the next screen, check all the profiles this rule applies to – "Domain", "Private" and "Public" and press Next
- Give the new rule a name – "Disable Port 80 Inbound" or similar. Optionally add a description
- If you need to remove the rule at a later time, select it in the "Inbound Rules" screen and choose "Delete" from the right hand menu panel

If this solution is not suitable because of technical restrictions or corporate policy, several other configurations are possible:

- Set up a separate web site for the remoting layer which is bound only to 127.0.0.1 port 80
- Configure WCF Activation to work over SSL
- Use the same web site bound to both port 80 and 443 as per the recommended solution, but use IIS IP address restrictions as an alternative (or in addition) to windows firewall

These options are not described in detail here, but support can assist if necessary.

2.1.5 Installing the Documentum DFC libraries

These must be installed on the server that runs the PleaseReview server – these do not need to be installed on the Documentum server itself.

Install the Documentum DFC libraries (version 7.1 or earlier). Once this is done you will need to install the Documentum DFC Primary Interop Assemblies (PIAs) that match this DFC version. These enable the .NET technologies that PleaseReview is built on to talk to the Documentum server. They can be downloaded from EMC directly from the same place that the Documentum DFC libraries were downloaded from.

If a pre-existing application requires another version of DFC to be installed then please contact support for more information.

If you are installing any other version of DFC up to and including 7.1, please contact support for assistance with the Primary Interop Installer.

Step not required Step Completed Step Failed

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2.1.6 Configuring the Documentum client for use with ASP.NET

Ensure that the Documentum client can see the docbroker that acts for the docbase(s) that will be integrated with PleaseReview. Your local Documentum system administrator will know how to do this.

Step not required Step Completed Step Failed

Date and Signature:

2.1.6.1 Modification to dmcl.ini

Find the file C:\Windows\dmcl.ini. **Note:** If this file is not present this section can be skipped as it is not required.

The following "local_path" entry needs to be added to your dmcl.ini file in the [DMAPI_CONFIGURATION] section, (you may need to create this section).

```
[DMAPI_CONFIGURATION]
local_path = C:\Documentum\ASP
```

You can specify any folder in the above entry. If the folder does not exist create it. Give the NETWORK SERVICE user (or, if you are using IIS 7 in Integrated pipeline mode, the IIS_IUSRS group) full access to the folder referenced by the "local_path" entry.

Step not required Step Completed Step Failed

Date and Signature:

2.1.6.2 Modification of the dfc.properties

Locate your dfc.properties. This file is typically in C:\Documentum\config

Add the following lines to your dfc.properties file:

```
dfc.data.dir=C:/Documentum/asp
dfc.user.dir=C:/Documentum/asp
dfc.checkout.dir=C:/Documentum/asp/checkout
dfc.export.dir=C:/Documentum/asp/export
dfc.registry.mode=file
dfc.registry.file=C:/Documentum/asp/documentum.ini
```

If there are already entries of the same name as entries you are creating, delete them or comment them out by inserting a hash/pound symbol "#" at the beginning of each line

Note: In the dfc.properties file the normal windows directory separator "\" is changed to "/" instead so if in doubt follow the example.

Ensure the directories referenced are all created. These directories are:

- C:\Documentum\asp
- C:\Documentum\asp\checkout
- C:\Documentum\asp\export

The file C:/Documentum/asp/documentum.ini does not need to be created in advance as DFC will create as and when required.

Give the group IIS_IUSRS full access to all the folders referenced above.

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Date and Signature:

IMPORTANT – Installing and uninstalling other Documentum or Documentum using applications will modify the files dfc.properties and dmcl.ini (if present). Ensure they are ALWAYS configured as noted above. Failure to do this will result in PleaseReview being unable to access any Documentum functionality.

2.2 Installing Java Documentum Remoting Layer

2.2.1 Minimum requirements

Tool	Minimum Supported Version	Latest Supported Version
PleaseReview	6.6.7	
Java Documentum Remoting Layer	6.6.7	
Documentum Server	7.2	16.4
Documentum Foundation Classes (DFC)	7.2	16.4
Java Runtime Environment (JRE)	11	11

IMPORTANT – Do ensure DFC is the same version as Documentum Server.

If you're performing this installation for the first time, we'd recommend to do it in the following order:

1. Java Runtime Environment (JRE)
2. Documentum Foundation Classes (DFC)
3. Java Documentum Remoting Layer (Java DRL)
4. PleaseReview Application

2.2.2 Installing Documentum DFC

The Java DRL is a Spring Boot Application running on embedded Tomcat. This layer is the part of PleaseReview that talks to Documentum. **Note:** The Java DRL uses Documentum DFC as external library hence Java Runtime Environment **must** already be installed before this step.

<p>Download your version of DFC from OpenText website and install with server configuration below:</p> <ul style="list-style-type: none"> • Installation directory - C:\Documentum • Domain - The same as setup in Documentum • Login name - dm_bof_registry • Password - The same as setup in Documentum 	<input type="checkbox"/> Step not required <input type="checkbox"/> Step Completed <input type="checkbox"/> Step Failed Date and Signature:
<p>Once DFC libraries are installed, ensure the DFC libraries and config files are in the server. The files are typically at:</p> <ul style="list-style-type: none"> • C:\Documentum\dctm.jar • C:\Documentum\Shared • C:\Documentum\config 	<input type="checkbox"/> Step not required <input type="checkbox"/> Step Completed <input type="checkbox"/> Step Failed Date and Signature:

2.2.3 Modification of the dfc.properties

- Locate the dfc.properties
- This file is typically at C:\Documentum\config
- Add the following line to the dfc.properties file:

```
dfc.date_format=yyyy.MM.dd HH:mm:ss
```

Step not required

Step Completed

Step Failed

Date and Signature:

2.2.4 Changing Java DRL properties (change port)

- By default, the application port is 10080
- If you wish to use a different port, edit application.properties in DmRemotingLayer.jar by changing the value of server.port
- The location of application.properties is at:
DmRemotingLayer.jar!\BOOT-INF\classes\application.properties

Step not required

Step Completed

Step Failed

Date and Signature:

2.2.5 Hosting the Java DRL

Begin by creating a directory, e.g., C:\DmRemotingLayer, and unzip the content of "PleaseReview_Documentum_JavaRemotingLayer_[version].zip" - the DmRemotingLayer.jar here.

There are 2 recommended hosting options in Windows:

1. Run Java DRL as a Packaged Application
2. Host Java DRL as [Microsoft Windows Services](#)

2.2.5.1 Run Java DRL as a Packaged Application

Spring Boot provides a platform to host the application that can run from a command prompt.

<ul style="list-style-type: none"> • Run Command Prompt as Administrator • The following command will execute Java DRL with DFC library and config files in C:\Documentum. Do change the Documentum location if your DFC library is installed on a different directory. <pre>java -cp C:\DocumentumRemotingLayer\DmRemotingLayer.jar; C:\Documentum\dctm.jar;C:/Documentum/config/ org.springframework.boot.loader.PropertiesLauncher</pre> • Use the URL below to verify Java DRL. The Docbroker name will be displayed. <pre>http://localhost:10080/SystemInfo/DocbaseNames</pre> 	<input type="checkbox"/> Step not required <input type="checkbox"/> Step Completed <input type="checkbox"/> Step Failed Date and Signature:
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NOTE – Hosting the Java DRL using command prompt require user intervention upon system reboot.

2.2.5.2 Host Java DRL as Microsoft Windows Services

A Spring Boot application can be started as a Windows service by using WinSW.

- Download WinSW from [here](#)
- Rename WinSW.exe from the distribution to describe what it is, e.g., DmRemotingLayer.exe
- Create a new XML file, DmRemotingLayer.xml. This XML file must be the same filename as the executable. Then, create the XML content by following the example below

```
<service>
  <!-- Specifies the ID that Windows uses internally to identify the service. -->
  <id>DmRemotingLayer</id>
  <!-- Short display name of the service, which can contain spaces and other
characters. -->
  <name>Documentum Remoting Layer</name>
  <description>This service runs Documentum Remoting Layer for
PleaseReview.</description>
  <!-- Change to "java.exe" if JAVA_HOME and JAVA path already set in enviroment
variable -->
  <executable>C:\Java\jdk-11.0.6+10-jre\bin\java.exe</executable>
  <arguments>-cp
C:\DmRemotingLayer\DmRemotingLayer.jar;C:\Documentum\dctm.jar;C:/Documentum/config/
org.springframework.boot.loader.PropertiesLauncher</arguments>
</service>
```

- Run Command Prompt as Administrator
- Run the following command to install Java DRL as Windows service:

```
DmRemotingLayer.exe install
```

- Start Documentum Remoting Layer in Windows Services
- Use the URL below to verify Java DRL. The Docbroker name will be displayed

```
http://localhost:10080/SystemInfo/DocbaseNames
```

Step not required Step Completed Step Failed

Date and Signature:

2.2.6 Removing WCF Documentum Remoting Layer

The WCF DRL and Java DRL can exist together. However, if you wished to remove the WCF DRL once you have the Java DRL installed, simply remove it from Windows IIS web site and delete the WCF DRL files in the server.

Step not required Step Completed Step Failed

Date and Signature:

3 Configuring the Documentum System Connector

Note: The Documentum System Connector is now included in the main PleaseReview server download. There is no longer any separate download for this specific component.

The following steps are required to enable the Documentum System Connector for PleaseReview:

<ul style="list-style-type: none">• In the Runtime/config directory rename the file DCTMLLogin.xml.template to be DCTMLLogin.xml. Editing instructions are below.• In the Runtime/bin directory rename the file taraservice.exe.config.dctm to be taraservice.exe.config	<input type="checkbox"/> Step not required <input type="checkbox"/> Step Completed <input type="checkbox"/> Step Failed Date and Signature:
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3.1 Editing web.config and adminclient.exe.config for WCF DRL

In order for the PleaseReview Documentum System Connector to “find” the WCF DRL, the PleaseReview main web.config in the TaraWeb directory and the adminclient.exe.config file in the runtime\bin directory must be updated.

This configuration update also allows PleaseReview to display much larger number of documents when using the PleaseReview Documentum file selector.

Open each file in an editor and add the following text just as shown:

```
</appSettings>  
</configuration>
```

To make the text block:

```
</appSettings>
<system.serviceModel>
  <bindings>
    <wsHttpBinding>
      <binding name="WSHttpBinding_IDocumentumThunk"
maxReceivedMessageSize="131072000">
        <readerQuotas maxDepth="64000000"
maxStringContentLength="64000000" maxArrayLength="64000000"
maxBytesPerRead="64000000"/>
      </binding>
    </wsHttpBinding>
  </bindings>
  <client>
    <endpoint
address="http://localhost/DocumentumRemotingLayer/DocumentumThunk.svc"
binding="wsHttpBinding" bindingConfiguration="WSHttpBinding_IDocumentumThunk"
contract="DocumentumRemotingLayer.IDocumentumThunk"
name="WSHttpBinding_IDocumentumThunk">
      <identity>
        <dns value="localhost"/>
      </identity>
    </endpoint>
  </client>
</system.serviceModel>
<system.web.extensions>
  <scripting>
    <webServices>
      <jsonSerialization maxJsonLength="10000000"/>
    </webServices>
  </scripting>
</system.web.extensions>
</configuration>
```

Step not required Step Completed Step Failed

Date and Signature:

3.1.1 Further changes if the DocumentumRemotingLayer is renamed

If the virtual root created in section 2.1.4.2 was not called "DocumentumRemotingLayer" as suggested, then you need to make two further configuration changes:

1. In the web.config section edited above, change "http://localhost/DocumentumRemotingLayer" to the actual URL
2. In the adminclient.exe.config section edited above, change "http://localhost/DocumentumRemotingLayer" to the actual URL
3. In the taraservice.exe.config make exactly the same change

Step not required Step Completed Step Failed

Date and Signature:

3.2 Editing web.config, adminclient.exe.config and TaraService.exe.config for Java DRL

For Java DRL, you only need to update the following configurations at web.config, AdminClient.exe.config and TaraService.exe.config to as follow:

```
</appSettings>
<system.web.extensions>
  <scripting>
    <webServices>
      <jsonSerialization maxJsonLength="10000000" />
    </webServices>
  </scripting>
</system.web.extensions>
</configuration>
```

Note: <system.serviceModel> configurations are only required for WCF DRL, remove <system.serviceModel> if upgrading from DCTM 7.1 and earlier.

Step not required Step Completed Step Failed

Date and Signature:

3.3 Edit PleaseReview Documentum configuration files

The configuration file for the Documentum System Connector is called DCTMLogin.xml and it defines what servers are accessible to PleaseReview and needs to be manually edited with a text editor or XML editor.

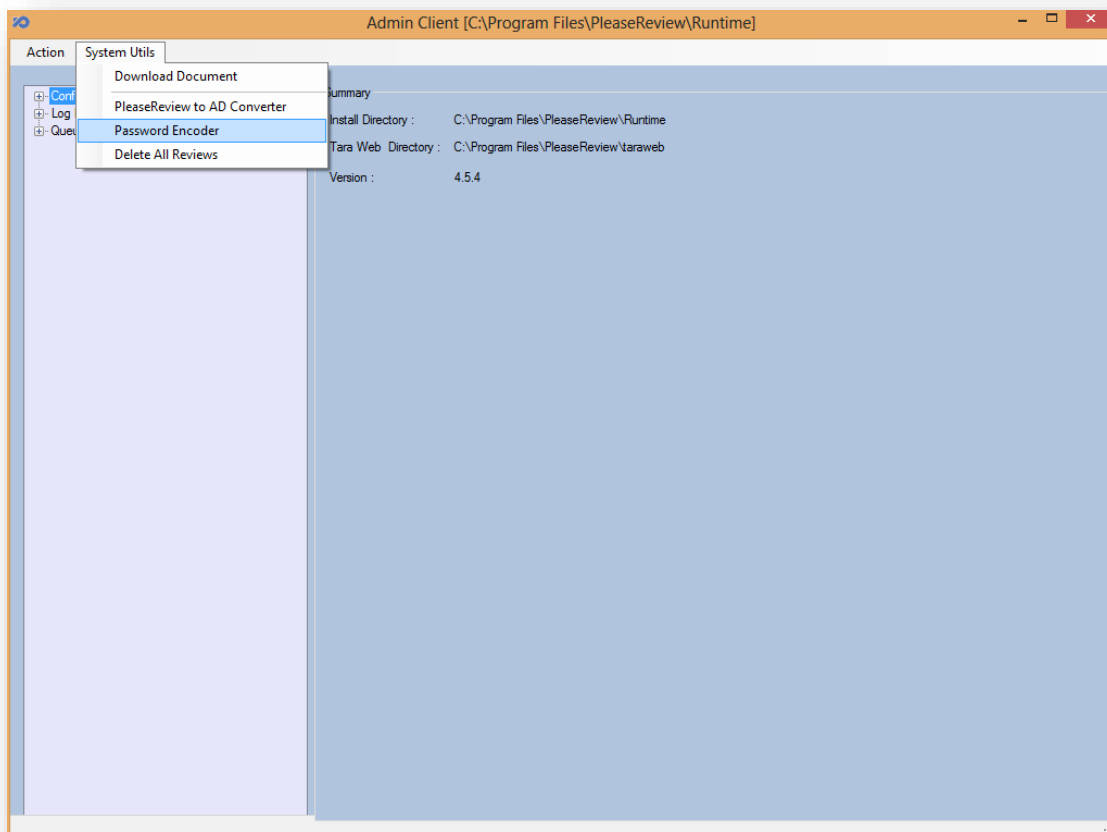
Normally when PleaseReview accesses a docbase on behalf of a user, it uses that user's credentials as supplied to PleaseReview to connect to the docbase. However, when PleaseReview itself (or the PleaseReview system administrator) needs to list Documentum users and groups, it uses a specific Documentum account which is configured in the DCTMLogin.xml. The account must be an administrator or super user account (or the docbase owner). This is required as PleaseReview uses this account to enable impersonation of other users in order to log them into Documentum when using the user integration for WebTop/Cara etc.

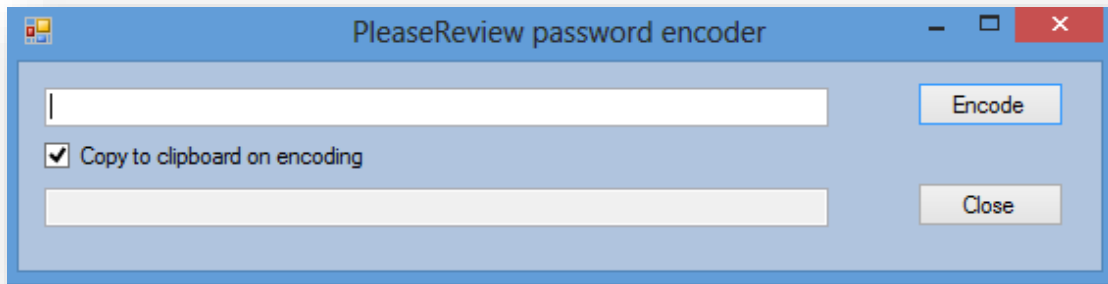
3.3.1 Editing the DCTMLLogin.xml file

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. Remove any "[[" and "]" markers after editing this file.

Setting	Description
[[DocbaseName]]	The name of the docbase that this user is in – This CANNOT be changed once set
[[DisplayName]]	The name of the docbase that user will see (e.g., Production docbase etc.)
[[DocbaseUser]]	The user name that PleaseReview will login into Documentum with. This is also known as the user_os_name or the user_login_name.
[[DocbasePassword]]	The encrypted password for the [[DocbaseUser]]. See below for more information on how this is generated

The [[DocbasePassword]] field is generated using the supplied utility in Runtime/bin called AdminClient.exe. Click on the System Utils menu then "Password Encoder" button.





Type the password into the top field and press encode and then paste the encoded password into the `<Password></Password>` entry in the DCTMLLogin.xml file so it looks something like the example below:

```
<ServerAdmin>
  <LoginName> [ [DocbaseUser] ] </LoginName>
  <Password>AQAAANCMnd8BFdERjHoAwE/C1+sBAAAARDWg2nQPSE05ngSZemkZnAQAAACAA
  AAAADZgAAqAAAABAAAADJjD5ego1/a9BM4y7+4FFZAAAAAASAAACgAAAAEAAAA_IvQM0h3jiNPbNi
  ootnTWAQAAAAc6jUh5ojNCzhz7ISCgIRxhQAAACdhrYwNuScuWbPd5ZIubUzEIHvng==</Password
  >
</ServerAdmin>
```

Note: The `[[DocbasePassword]]` field must be all on ONE line. Any line breaks or carriage returns will cause PleaseReview to not start at all. You may have to remove extraneous line breaks from your copied text before pasting into the DCTMLLogin.xml file.

If a domain component is entered for this user when logging into Documentum then add the following:

```
<UserArg1> [ [Domain] ] </UserArg1>
```

Add this after the `</Password>` but before the `</ServerAdmin>` section, replacing `[[Domain]]` with the correct domain name.

3.3.2 Update DocumentWebApiUrl for Java DRL

The default DocumentWebApiUrl value in DCTMLLogin.xml is as follow:

```
<DocumentumWebApiUrl>http://localhost:10080</DocumentumWebApiUrl>
```

Add this before the `<DocTypeMapping>` section if you were upgrading from PleaseReview 6.5 or earlier.

3.3.3 Changing how documents are handled

When PleaseReview needs to fetch a document from a 3rd party system it can either “checkout” the document (place a lock on it) or just “get” the content and not lock the source document. The checkout action depends on the doctype.

If the doctype is not dm_document then the document will be extracted from Documentum using the default action (checkout) as this is default setting that ships with PleaseReview.

If you want to change this then edit the DCTMLogin.xml file to add the doctypes you want to “get” instead and add the following after the </DocTypeMapping> tag:

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

Replacing my_document_type with the type you want “got” out.

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

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

Note: A document type mapping must only occur once for each doctype.

PleaseReview cannot check out documents that the user would not normally be able to checkout due to permissions etc.

Step not required Step Completed Step Failed

Date and Signature:

3.3.4 Ensuring certain file types are not checked out

Certain types of files such as images, PowerPoint and Adobe PDF files are not updated by PleaseReview and as such checking them out may not be useful. By default, PleaseReview stops these types of files being checked but should this behaviour not be required just remove the entry from the following section:

```
<AlwaysGet>
  <string>.PDF</string>
  <string>.PPT</string>
  <string>.PPTX</string>
  <string>.JPG</string>
  <string>.GIF</string>
  <string>.PNG</string>
  <string>gif</string>
  <string>jpeg</string>
  <string>ppt_win7</string>
  <string>ppt8</string>
  <string>ppt12</string>
  <string>png</string>
  <string>fopdf</string>
  <string>application/pdf</string>
  <string>pdf</string>
</AlwaysGet>
```

New ones can be added as well – this is not a fixed list. **Note:** All extensions (those starting with '.' i.e., .PDF, .GIF, etc.) must be in uppercase as above.

Step not required Step Completed Step Failed

Date and Signature:

3.3.5 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>
```

To be one of the following:

Setting	Description
<DefaultRole>Reviewer</DefaultRole>	A reviewer – cannot create new reviews but can join created ones

<DefaultRole> Author </DefaultRole>	An author – can create new reviews but not add users
<DefaultRole> Admin Only </DefaultRole>	A workgroup administrator – can create new reviews and add new users

Note: 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 be review owners.

Step not required Step Completed Step Failed

Date and Signature:

3.3.6 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 DCTMLLogin.xml file.

Documentum check in options	
0	Check in a document as a new major
1	Check in a document as a new minor revision
2	Check in as the same revision (not normally used and not mentioned in the config file)
3	Check in as a branch revision (not normally used and not mentioned in the config file)
4	Removes the lock on the document in Documentum.
5	Leave locked (not normally used)
6	Display the document using the currently selected document download settings
7	Display the reconciliation report for the document.
32	Check in as a new major revision and then re-lock the document
33	Check in as a new minor revision and then re-lock the document

Option 32 is shown only for completeness and is not defined in the DCTMLLogin.xml.template file.

Option 33 may be removed if the multiple check in functionality is not required.

Options 6 and 7 should be 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>Cancel checkout</Description>
  </CheckinOptions>
  <CheckinOptions>
    <CheckinMode>5</CheckinMode>
    <Description>Leave locked</Description>
  </CheckinOptions>
  <CheckinOptions>
    <CheckinMode>6</CheckinMode>
    <Description>Display Document</Description>
  </CheckinOptions>
  <CheckinOptions>
    <CheckinMode>7</CheckinMode>
    <Description>View report</Description>
  </CheckinOptions>
</CheckinOptions>

```

Note: The <Description></Description> field can be changed to meet local naming requirements.

Step not required Step Completed Step Failed

Date and Signature:

3.3.7 Automatic setting of the check in label

If corporate policy is that users should not enter a label when they check in a document (having a user enter a label is the default) it is now possible to provide a default label to be used and the end user will never be prompted for a label. This setting is for all servers that are defined for use by PleaseReview. At the end of DCTMLLogin.xml file there is the following setting:

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

Which means the user will be prompted for a label.

To set a default label, specify:

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

To apply several labels, separate them by a comma (without a space in between). **Note:** PleaseReview will not automatically label the new version as current; to do this include the Documentum special label CURRENT (in upper case) in the list of labels to be applied. For instance:

```
<CheckinLabel>MyLabel , CURRENT</CheckinLabel>
```

Will label the new version with MyLabel and make it current. Labels cannot be numeric as this is a Documentum limitation.

Step not required Step Completed Step Failed

Date and Signature:

3.3.8 Automatic generation of a PDF rendition upon check in

PleaseReview can automatically force a rendition of the checked in document to be rendered. This functionality is turned off by default but may be turned on by changing:

```
<ForceRenderOnCheckin>false</ForceRenderOnCheckin>
```

To:

```
<ForceRenderOnCheckin>true</ForceRenderOnCheckin>
```

The other settings should not be altered unless a non-standard rendition server is being used in conjunction with Documentum. If you are in any doubt consult your local Documentum administrator for the required settings and then contact support for assistance.

Step not required Step Completed Step Failed

Date and Signature:

3.3.9 Applying the CURRENT label if a label does not exist

In certain circumstances where more sophisticated version labels and workflows are being used it may be desirable to set a document to have an additional label of CURRENT if the document is not approved for example. This stops users attempting to review the wrong document version.

This setting is not active by default and is not normally required for a standard Documentum installation. To turn it on, change:

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

To:

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

Step not required Step Completed Step Failed

Date and Signature:

3.3.10 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 document as the attribute "log_entry" – this being the same as the check in description when checking in a document via WebTop.

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

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

To:

```
<CheckInDescription></CheckInDescription>
```

Step not required Step Completed Step Failed

Date and Signature:

3.3.11 Adding a short report during check in

Sometimes for auditing reasons a short report is required to show who did what during a review. This is not the full PleaseReview reconciliation report; it is just designed to show the following detail:

- The document title
- The report generation date
- The title, description and end date of the review
- For each participant in the review the report will show their user name, login name, email address, status (Not started, In Progress, Completed, Review Owner etc.), their summary and a count of any comments they have made.

An example of the final report is shown below:

report for review Example Review

document Test Document

report generated on 23 Nov 2010 10:00

review details

Title	Example Review
Description	Review description
End Date	20 Nov 2010 23:45

participants

User name	Login name	Email	Status	Role	Summary	Comments
Test User	test	dctm65@example.com	Review Owner	Owner		0

Diagram annotations (shown in red in the original image):

- A bracket groups the "review details" table with the label **ShowReviewDetails**.
- Vertical labels under the "participants" table indicate which columns are shown:
 - ShowUserName** (under User name)
 - ShowLoginName** (under Login name)
 - ShowEmail** (under Email)
 - ShowParticipantStatus** (under Status)
 - ShowParticipantRole** (under Role)
 - ShowParticipantSummary** (under Summary)
 - ShowParticipantCommentCount** (under Comments)

This can be configured by editing the ShortReconReport section in the DCTMLLogin.xml file for each defined server. An example of this section is shown below which will match the output of the diagram above.

```
<ShortReconReport>
  <ShowReviewDetails>true</ShowReviewDetails>;
  <ShowUserName>true</ShowUserName>
  <ShowLoginName>true</ShowLoginName>
  <ShowEmail>true</ShowEmail>
  <ShowParticipantStatus>true</ShowParticipantStatus>
  <ShowParticipantRole>true</ShowParticipantRole>
  <ShowParticipantSummary>true</ShowParticipantSummary>
  <ShowParticipantCommentCount>true</ShowParticipantCommentCount>
</ShortReconReport>
```

If this report is not required then delete this entire section from the DCTMLLogin.xml file.

The report is saved as a separate HTML file attached as an annotation to the version checked in by PleaseReview. It is accessed via the original document's "View" menu, "Versions" option and then by selecting the "View" menu for the version and selecting the "Relationship" option.

Step not required Step Completed Step Failed

Date and Signature:

3.3.12 Configuring labels to be used as reference documents

It may be desirable to ensure that documents with certain symbolic labels can only be put in a review as reference (read only) documents. This stops reviewers commenting on documents that have been added to a review as guides for example, rather than a document that should be marked up. Reference documents are clearly marked as read-only during the review process in PleaseReview.

To add a label to this list, change:

```
<LabelsToBeUsedAsReferenceDocuments></LabelsToBeUsedAsReferenceDocuments>
```

To:

```
<LabelsToBeUsedAsReferenceDocuments>  
  <string>Approved</string>  
</LabelsToBeUsedAsReferenceDocuments>
```

Where each label is placed in a `<string></string>` tag.

Step not required Step Completed Step Failed

Date and Signature:

3.3.13 Enabling review pop-up

This setting is for use when PleaseReview is integrated into WebTop, Cara or other similar packages. It allows the user or system admin to choose that when a user clicks on the review title in the WebTop inbox, the review is displayed as a pop up window or embedded in the WebTop main window. The default behaviour is for the review to be displayed in a pop up window and allows the user to override the setting if they want to.

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

To make embedded review the default:

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

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:

3.3.14 Always use super-user to check out and check in documents

This setting forces PleaseReview to always use the pre-defined "super-user" to actually do the check out and check in of documents. By default, users will check out and check in documents using their own accounts. This setting is only required if site policy dictates that all documents be managed by a specific user.

To change PleaseReview to check out and check in all documents as the user defined in section, change:

```
<CheckoutUsingSystemAccount>false</CheckoutUsingSystemAccount>
```

To:

```
<CheckoutUsingSystemAccount>true</CheckoutUsingSystemAccount>
```

Step not required Step Completed Step Failed

Date and Signature:

3.3.15 Annotation objects

This setting forces PleaseReview to add Documentum annotation objects to documents when Documentum files are being reviewed. This allows documents that have been passed through PleaseReview to have that fact noted in Documentum. The existence of the annotation object on a document will normally stop documents being promoted to the next state. This is because the documents with annotations on them indicates that the document content has comments that need resolving.

If a document is NOT to be checked out, then as soon as it is added to the review it will have an annotation placed on it. If the document is removed from the review, then the annotation will be removed from the document in Documentum. Otherwise, it exists on the reviewed document version for ever.

If a document is to be checked out (Word, Excel) then when it is added to the review it will be checked out as normal and an annotation object will be automatically added to the checked out version. When the document is checked back in if the document has no open PleaseReview comments then it is simply checked back in with no annotation object attached. If the document has open comments, then the new version will be checked back in with an annotation object. **Note:** The annotation object will be attached to the specified document as set in the `WriteAuditTrailAndAddAnnotationObjectMode` setting (refer [Configuring audit trail and annotation object for documents](#)).

To change PleaseReview to check out and check in all documents as the user defined in section, change:

```
<AddAnnotationObject>false</AddAnnotationObject>
```

To:

```
<AddAnnotationObject>true</AddAnnotationObject>
```

Step not required Step Completed Step Failed

Date and Signature:

3.3.16 Configuring audit trail and annotation object for documents

This setting controls which document the Documentum audit trail and annotation object will be written and attached to - the checked out document or the checked in reviewed document.

The default value is set to write audit trail and attach annotation object to the checked out document. To write audit trail and attach annotation object to the checked in reviewed document, change:

```
<WriteAuditTrailAndAddAnnotationObjectMode>CheckOutMainDocument</WriteAuditTrailAndAddAnnotationObjectMode>
```

To:

```
<WriteAuditTrailAndAddAnnotationObjectMode>CheckInReviewedDocument</WriteAuditTrailAndAddAnnotationObjectMode>
```

Note: If Documentum audit trail is not enabled (refer Writing to the Documentum audit trail), this setting will still attach an annotation object to the specified document as set in the value.

Step not required Step Completed Step Failed

Date and Signature:

3.3.17 Synchronizing members from sub-groups

When PleaseReview lists the members of Documentum groups PleaseReview only extracts users who are direct members of the group in question, it does NOT expand the membership of sub-groups of the group in Documentum.

For example a group in Documentum called TESTGROUP is to be mapped into PleaseReview as a locked workgroup. If the Documentum group TESTGROUP has a sub-group in it called SUBTESTGROUP then none of the users in SUBTESTGROUP will be mapped into PleaseReview; only the users that actually in TESTGROUP will be visible.

However this default behavior can now be changed so that any sub-groups of the mapped group will now have their members added into the main PleaseReview group when they are mapped across.

Change:

```
<TraverseGroups>false</TraverseGroups>
```

To:

```
<TraverseGroups>>true</TraverseGroups>
```

Note: Turning this flag on to force group traversal may have unintended consequences. It is VERY important that the group mapping structure is properly understood as when the sync job next runs and this setting is changed the PleaseReview workgroup membership may well change if the Documentum group has sub-groups.

Step not required Step Completed Step Failed

Date and Signature:

3.3.18 Writing to the Documentum audit trail

PleaseReview has the ability to write to the Documentum audit trail when a document has been reviewed in PleaseReview. This allows the meaning of the document in a review to be recorded for all participants in the review, including the review owner (author).

For each document sourced from Documentum one audit trail will be written for every participant. For example, if there are 5 participants in a review that has 3 documents sourced from Documentum, there will be 5 audit entries written against each of the 3 documents.

Regardless of if the document has checked out or simply “got” during the review process, the audit trail entries will still be recorded in Documentum. This is to ensure that, no matter how the document was handled in PleaseReview, a record is kept that the document was reviewed.

Documents¹ that are not sourced from Documentum will **not** have an audit trail entry written as it isn't meaningful.

Reference documents aren't reviewed and therefore will **not** have an audit trail entry written, regardless of where they came from.

3.3.18.1 What and when information gets written to the audit trail

PleaseReview only writes to the Documentum audit trail when the review is completed by the review owner. When the review is completed the audit trail entries get written for all documents there and then.

When a review participant (but not the review owner) exits the review interface they are prompted for their status in the review. If they indicate that they have completed the review then they will be forced to enter a “meaning” for their review of each document in the review. This “meaning” is taken from list of <Meanings> - see below for an example of this.

The review owner cannot set their completion state for a review when they exit the review interface as it is not meaningful for them. The review owner will enter their meaning for each document when they complete the review in the review closeout screen. Review owners get an additional meaning that is “Review Owner” as well as those the participants see.

¹ Documents sourced from the user's desktop

3.3.18.2 How and why the information gets written to the audit trail

Each participant (but not the review owner) has a meaning and an outcome in the review so the outcome will be one of three states either:

Outcome	Why?	Meaning
Completed	The user set their review status to be completed.	The value the participant selected when they indicated they had completed the review. This indicates that the user took a positive action in the review and complete their work.
Did not participate	The user never entered the review	Set from the PleaseReview system configuration setting <code>MeaningIfUserNeverStarted</code> . This will be "None" by default
Did not complete	The user entered the review but did not complete it i.e. user was in progress	Set from the PleaseReview system configuration setting <code>MeaningIfUserNeverCompleted</code> . This will be "None" by default

3.3.18.3 Field mappings from PleaseReview into the Documentum audit trail

PleaseReview uses new configuration settings in the `<AuditEntryMapping>` section to decide what data to write into what field in the `dm_audittrail` object:

```
<string_1>{6}</string_1>
<string_2>{0}</string_2>
<string_3>PleaseReview</string_3>
<string_4>{2}</string_4>
<string_5>{5}</string_5>
<user_name>{4} ({7})</user_name>
<event_name>FDK Acknowledgement</event_name>
<event_source>FDK Configurable workflow</event_source>
```

These are direct mappings into `dm_audittrail` attributes to allow a degree of flexibility when mapping PleaseReview values.

Any item that is text (no `{}` symbols) is written as is and will not be processed by PleaseReview. The values for the attributes `string_3`, `event_name` and `event_source` are of this type.

If a value needs to be sourced from PleaseReview then the following table shows the field codes that will be replaced by values when the audit trail entry is written:

Field code	Notes
{0}	The PleaseReview Review Id
{1}	The participant's ID in PleaseReview
{2}	The participant's meaning
{3}	The version of the document in Documentum that was reviewed. If the document was checked back in then this is the new version, otherwise it is the original version of the document.
{4}	The participant's full name
{5}	The participant's outcome
{6}	The participant's review summary
{7}	The participant's email address

The following fields control what text is written to the outcome and meaning fields in the event the user does not participate (start the review) or complete (remains offline/in progress) when the review owner completes the review and the audit trail is written:

```
<MeaningIfUserNeverStarted>None</MeaningIfUserNeverStarted>
<OutcomeIfUserNeverStarted>Did not participate</OutcomeIfUserNeverStarted>
<MeaningIfUserNeverCompleted>None</MeaningIfUserNeverCompleted>
<OutcomeIfUserNeverCompleted>Did not complete</OutcomeIfUserNeverCompleted>
```

The field below allows the setting of the review owner's meaning.

```
<ReviewOwnerDefaultMeaning>Review Owner</ReviewOwnerDefaultMeaning>
```

3.3.18.4 Enabling writing to the audit trail

Before the </DocumentumServer> tag, add the following text:

```
<Meanings>
  <string>Analytical Review</string>
  <string>Development Review</string>
  <string>Clinical Review</string>
  <string>Did Not Review</string>
  <string>Labeling Review</string>
  <string>Legal Review</string>
  <string>Publisher Review</string>
</Meanings>
<AuditEntryMapping>
  <string_1>{6}</string_1>
  <string_2>{0}</string_2>
  <string_3>PleaseReview</string_3>
  <string_4>{2}</string_4>
  <string_5>{5}</string_5>
  <user_name>{4} ({7})</user_name>
  <event_name>FDK Acknowledgement</event_name>
  <event_source>FDK Configurable workflow</event_source>
  <MeaningIfUserNeverStarted>None</MeaningIfUserNeverStarted>
  <OutcomeIfUserNeverStarted>Did not participate</OutcomeIfUserNeverStarted>
  <MeaningIfUserNeverCompleted>None</MeaningIfUserNeverCompleted>
  <OutcomeIfUserNeverCompleted>Did not complete</OutcomeIfUserNeverCompleted>
  <ReviewOwnerDefaultMeaning>Review Owner</ReviewOwnerDefaultMeaning>
  <IncludeExternalParticipant>false</IncludeExternalParticipant>
</AuditEntryMapping>
```

See the sections above on what all these fields mean.

Step not required Step Completed Step Failed

Date and Signature:

3.3.18.5 Enabling audit trail for non-Documentum user

To enable non-Documentum user to write to Documentum audit trail, change:

```
<IncludeExternalParticipant>false</IncludeExternalParticipant>
```

To:

```
<IncludeExternalParticipant>true</IncludeExternalParticipant>
```

This will allow non-Documentum participants to enter "meaning" for their review.

Step not required Step Completed Step Failed

Date and Signature:

3.4 Editing the systemconnectors.xml file

3.4.1 Copy sample file

The sample PleaseReview System Connector configuration file is in the runtime/config directory and is called systemconnectors.xml.dctm. Take a copy of the file and remove the ".dctm" extension so the file is called systemconnectors.xml.

There should not already be a systemconnectors.xml file in the runtime/config directory unless you are using more than one system connector in the same PleaseReview installation. If this is the case, you will need to merge the contents – please contact support for further information.

You will need to edit the file with a text editor or XML editor. Editing instructions are below.

Step not required Step Completed Step Failed

Date and Signature:

3.4.2 Configure systemconnectors.xml

Replace "[[DocBase]]" with the name of the Documentum docbase. This must be the same as the "[[DocbaseName]]" used in the previous section.

Replace "[[FriendlyName]]" with a name to identify the Documentum server on the login screen. This should probably be the same as the "[[DisplayName]]" used in the previous section but it does not have to match.

Note: If you have multiple docbases that PleaseReview will use, you will need to repeat the section below once for each docbase:

```
<LoginMethod>
  <ExtSource>Documentum: [ [DocBase] ]</ExtSource>
  <Authenticator>Documentum</Authenticator>
  <FriendlyName> [ [FriendlyName] ]</FriendlyName>
</LoginMethod>
```

Step not required Step Completed Step Failed

Date and Signature:

4 Operational Considerations

4.1 Restarting the Documentum Remoting Layer

The Documentum Remoting Layer holds a “cache” of DFC logins (not sessions) in memory, and these are accessed when the user performs an action in PleaseReview that needs to access Documentum (such as check-in or check-out). This means:

1. If the remoting layer is restarted whilst PleaseReview is running, any active PleaseReview users will lose their Documentum session and will need to log out of PleaseReview and back in before they can check documents in or out.
2. If PleaseReview is restarted whilst the remoting layer is running, any sessions established in the remoting layer will be “orphaned” because they are no longer connected to a PleaseReview session, and this may in time lead to session starvation.

The recommended approach is to configure both the PleaseReview and remoting layer application pools (if using WCF DRL) to disable automatic recycling, so that in the normal course of events, neither shuts down. However, if you do need to schedule a restart, we strongly recommend you restart both PleaseReview and the remoting layer at the same time. You should normally start up the remoting layer before starting PleaseReview and shut it down after shutting down PleaseReview.

The Documentum Remoting Layer does NOT hold DFC sessions open. They are created and returned to the server’s session pool as quickly as possible.

5 Post Installation Activities

Once the Documentum connector is installed it will be necessary to do two follow-up tasks:

1. Test that the installation was successful;
2. Map users to PleaseReview from Documentum so that Documentum users can log in to PleaseReview.

5.1 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 the “PleaseReview database”. Enter a user name that you know exists in Documentum 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:** This user can now log in to PleaseReview but their password will be verified against Documentum. 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 the login source that was added above. Enter the user name and 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 the PleaseReview database), return to the 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.

5.2 Mapping users and groups

Before Documentum 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.

6 Notices

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