



CARA Installation Guide

Version 7.x

Contents

1 Introduction	4
1.1 Overview	4
1.2 Upgrading from an earlier version of PleaseReview	4
Upgrade version number	4
Changes made at Version 6.2	4
Upgrade Tests	5
1.3 Scope	5
1.4 Skills required	5
1.5 Architecture diagram	6
1.6 Supported Platforms	7
1.7 Supported Functionality	7
2 Configuring the PleaseReview server	8
2.1 Overview	8
2.2 Prerequisites	8
CARA	8
PleaseReview	8
2.3 Required configuration changes	9
Turn off major version check in	9
Turn on default label for document upon check in	9
Turn on setting the document label to current if it is not yet approved	9
Turn on Review Inbox export	9
Include Participant Details in CARA Inbox (Optional)	10
Turn off Embed Review User Setting	10
Restart the PleaseReview Services	10
3 Installing the CARA Integration	11
3.1 Things you will need to know	11
The URL of the PleaseReview server	11
The groups of CARA users who will use PleaseReview	11
Locate the CARA webapps directory	11
3.2 Installing the software	11
Installing the files	11
3.3 Creating DocBase objects	11
PR_REVIEW_TASK object	11
PleaseReview DocBase Roles	12
Groups for locked workgroups	12
3.4 Installing the PleaseReview icons	13
3.5 Installing the PleaseReview custom actions	13
Custom Code	13
Custom Actions	13
3.6 Installing the PleaseReview dictionaries	14
PleaseReviewConfigSettings	14
Object Types	15
3.7 Installing the PleaseReview forms	17
pr_review_task Form	17
3.8 Installing the PleaseReview custom configuration	19

Export Existing CARA Configuration.....	19
Adding View SnapLists	20
Reimporting PleaseReview Configuration into CARA	21
3.9 Adding Menu Actions.....	22
Menu	24
Toolbar	26
Recycle CARA Web Server	27
Configuring the PleaseReview email templates	27
Applying CARA Theme in PleaseReview Screens	28
Recycle Tara Service.....	28
3.10 Testing the installation.....	29
Sync Test User into PleaseReview	29
Set Test User Permissions.....	29
Create New Review	29
Validate Review SnapList entry	30
Validate new Administration functionality	31
4 Appendix A.....	36
4.1 Features Not Supported	36
4.2 Known Limitations	36
5 Notices.....	38

1 Introduction

1.1 Overview

This manual contains instructions on installing, configuring, maintaining and troubleshooting the integration between the PleaseReview document review server and CARA, when used in conjunction with Documentum Server.

Note that the development name for the PleaseReview product is "Tara". This name is not visible to the end user but when administering the system at the Operating System level; you will see this is reflected in the names of some files, directories, configuration entries etc.

1.2 Upgrading from an earlier version of PleaseReview

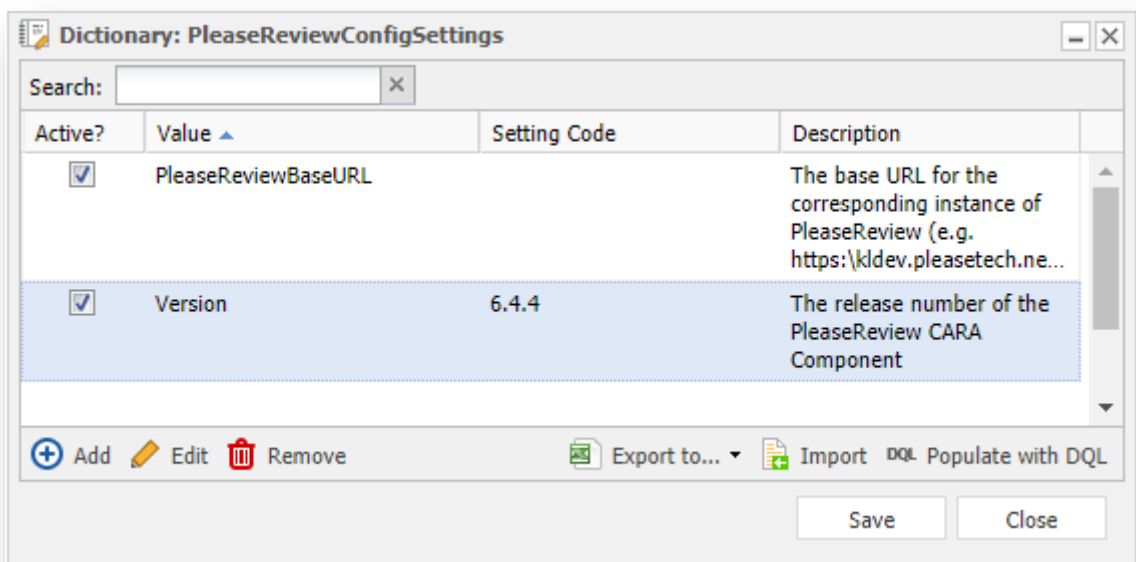
If you are upgrading from a previous version of PleaseReview, you will first need to patch the PleaseReview Server and PleaseReview Documentum Remoting Layer, in addition to reconfiguring the PleaseReview Documentum System Connector so they are all at the same new patch level.

Please note that PleaseReview 6.6.7 and later supports Documentum Server version 7.2 up to 16.4 with Java Documentum Remoting Layer. The WCF Documentum Remoting Layer will still work for Documentum Server version 7.1 and earlier.

1.2.1 Upgrade version number

You then need to reset the internal PleaseReview version number within CARA to match that of the upgraded release.

To do this, use the CARA interface, logging in as an Administrator, and open the `Control Panel`. On the `Data` tab, press the `Dictionaries` button, which will open the `Dictionary Manager` form. To update the version number, select `PleaseReviewConfigSettings` in the `Dictionary Manager` form and then press `Edit`. The below screen will appear:



Next, highlight the value `Version` and press `Edit`. In the `Setting Code` field enter the new version number for your patched PleaseReview instance.

1.2.2 Changes made at Version 6.2

If you are upgrading PleaseReview from 6.2 or later to 7.x, you may skip this section.

If you are upgrading PleaseReview to 6.x from a version of PleaseReview prior to 6.2, you will need to make additional changes. Extract the provided zip file (PleaseReview_CARA_UI_xxx.zip) into a temporary directory and use it to make the required Cara configuration changes, as listed:

- Create a new DocBase role `cara_pleasereview_admin`, using the DQL statements provide in section PleaseReview DocBase Roles.
- Repeat the PleaseReview icon installation in section Installing the PleaseReview icons.
- Update the custom action code by repeating the step in section Custom Code by replacing the existingJSP files.
- Create the two new custom actions "New Review as PDF (with documents)" and "Workgroup Administration" and recreate the "Review Control Panel" custom action, as per the instructions in section Custom Actions.
- Create a new SnapList "All Reviews (Admin)", as per section Installing the PleaseReview custom configuration.
- Create a new menu item "New Review as PDF (with documents)", as per section Menu.
- Create a new toolbar items "New Review as PDF (with documents)" and "Workgroup Administration", as per section Toolbar.
- Recycle the CARA Web Server, as per section Recycle CARA Web Server.
- Assign any admin users to the base sync work, as per section Groups for locked workgroups. Then perform a user sync and set their workgroup role via the PleaseReview Admin screens to include `admin`. Finally addthem to the DocBase role `cara_pleasereview_admin` to enable the Workgroup Administration features.

1.2.3 Upgrade Tests

You should now test the system as outlined in section Testing the installation. No further patching is required.

1.3 Scope

This manual is intended for IT staff working at the Operating System level, and does not contain information for end users or for application level administrators (workgroup administrators).

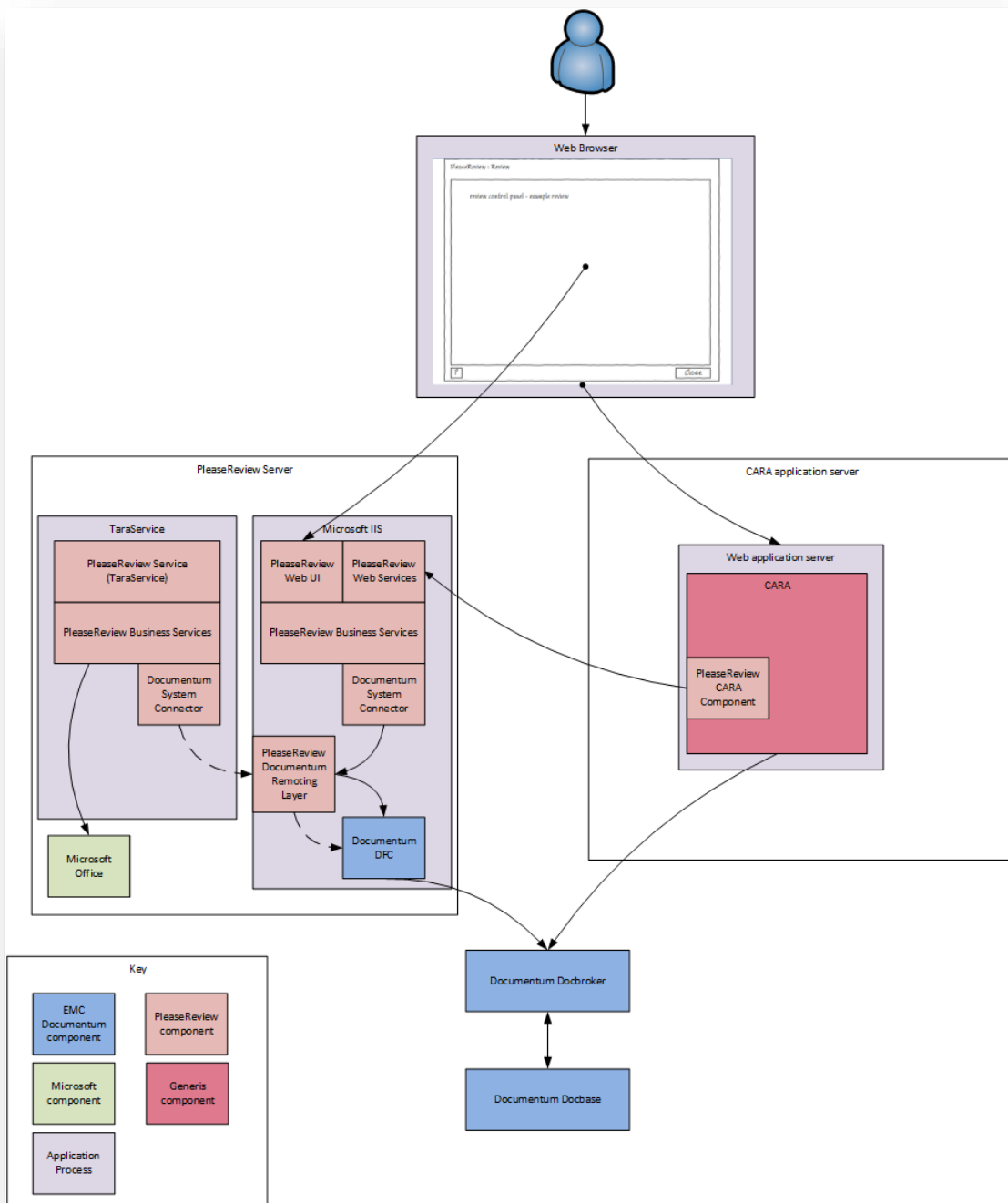
1.4 Skills required

Although the installation steps are described in detail, the installation process is largely a manual one and not intended for the novice. To successfully install and configure the CARA integration, you should be familiar with:

- Managing file and directory permissions
- Editing XML configuration files (using a generic text editor such as notepad or an XML-specific editor)
- Documentum Server
- CARA (CARA Explorer, DQL and Control Panel)

1.5 Architecture diagram

This diagram shows the touch points between PleaseReview and CARA. The user interacts with the CARA web application via the web browser. The web application displays certain PleaseReview components within a frame in the CARA web app. This is seamless to the end user – as far as they are concerned they are just viewing the information for a review within CARA.



1.6 Supported Platforms

At present PleaseReview integrates with CARA 3.11.4.2 running on Documentum Server 7.1, 7.2, 7.3 and 16.4, with the respective Documentum Foundation Classes (DFC) 7.1, 7.2, 7.3 or 16.4. This must be installed and functional before any further work is done.

The CARA integration has been tested running on the Apache TomCat Web Application server running on Windows Server 2012 R2 (64-bit) and Windows Server 2019 Standard. If you require other platforms to be supported, please contact support.

1.7 Supported Functionality

Some of the standard PleaseReview functionality is not available when used in conjunction with CARA on Documentum Server and hence is not supported. Details of these can be found in section Appendix A, along with details of any known limitations.

2 Configuring the PleaseReview server

2.1 Overview

When PleaseReview is integrated with CARA some configuration changes will be required to the PleaseReview Documentum system connector configuration. This is required to make PleaseReview work within the CARA document workflow.

2.2 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.

2.2.1 CARA

All necessary required baseline PleaseReview DocBase configuration is completed within the CARA Control Panel and that the interface must be fully operational before this installation is started. Specifically confirm that:

- On the Data tab a Taxonomy called "Main Classification" exists
- On the Data tab a Dictionary with the name "Object Types" and alias of "en" exists, containing an item with the Value of "dm_document", en of "Document"
- For the "Main Classification" Taxonomy ensure its property Level 1 set to "Object Types" and that the item "dm_document (Document)" is available
- On the Categories tab a Category Definition exists with the following category details: Name of "All Documents", Type of "dm_document", Query of "1=1" and "All versions?" checkbox checked.
- On the General tab under General Configuration, the "Enable manual linking and security" checkbox is checked
- On the Classification tab a Classification Definition exists with the following properties: Defining Taxonomy of "Main Classification", Base_object_type of "dm_document", Level_1_property of "r_object_type", Level_1_label of "Type" and all of the new document configuration types being enabled with a Mandatory level of "1" and a Template mandatory level of "1".
- A new dm_document (Document) of type Word has been added to the DocBase and the latest version has subsequently been checked out edited and checked in as a new minor revision.

If any of the list configuration is not complete or the interface is not operational, please contact Generis for advice on how to do so.

2.2.2 PleaseReview

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

- The PleaseReview Documentum System Connector is installed and operational.
- CARA users have been added to PleaseReview and can login.
- CARA users can add documents from CARA into a PleaseReview review using the PleaseReview interface.

2.3 Required configuration changes

Log onto the PleaseReview server and open the file Runtime/config/DCTMLLogin.xml in a text editor.

2.3.1 Turn off major version check in

CARA requires that major revisions go through the CARA workflow and requires specific actions to be performed before the document is promoted to a major revision. Although PleaseReview supports major version check in it must not be used in this case.

In the `<CheckinOptions>` block remove the following sub-block

```
<CheckinOptions>
  <CheckinMode>0</CheckinMode>
  <Description>Check in as a major revision</Description>
  <ExtraInfoPopup>../DocumentumSystemConnectorWeb/CheckinLabel.
    aspx</ExtraInfoPopup>
</CheckinOptions>
```

So the `<CheckinOptions>` block starts as follows:

```
<CheckinOptions>
  <CheckinOptions>
    <CheckinMode>1</CheckinMode>
    <Description>Check in as a minor revision</Description>
    :
  </CheckinOptions>
```

2.3.2 Turn on default label for document upon check in

When PleaseReview checks a minor version into CARA it is possible to set the default check in label for the version. To do this change:

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

To the desired value. For example

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

2.3.3 Turn on setting the document label to current if it is not yet approved

If a document is not "Approved" then when PleaseReview checks the document in the label "CURRENT" must also be added to the `<CheckinLabel>` above. If the document is "Approved" then the label "CURRENT" will not be applied and the last "Approved" version will be left as "CURRENT" instead. This is done to meet the document promotion rules required by CARA.

This setting is not active by default and is required for the CARA integration. To turn it on change:

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

To

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

2.3.4 Turn on Review Inbox export

In order for details of review inbox items to be displayed in the Review SnapList within CARA, it is necessary to send details as they occur in PleaseReview. To do this change the value

```
<ExportReviewInboxEnabled>>false</ExportReviewInboxEnabled>
```

to

```
<ExportReviewInboxEnabled>>true</ExportReviewInboxEnabled>
```

2.3.5 Include Participant Details in CARA Inbox (Optional)

If desired, it is possible to include details of Review Participants in the PleaseReview snap lists properties page. By default this is disabled as it causes a performance overhead where reviews have large numbers of participants. Should however you wish to enable this feature, change the value

```
<ExportReviewIncludeParticipants>false</ExportReviewIncludeParticipants>
```

to

```
<ExportReviewIncludeParticipants>true</ExportReviewIncludeParticipants>
```

2.3.6 Turn off Embed Review User Setting

Turn off the Embed Review User Setting, as this feature isn't available in the CARA integration. To do this change the value

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

to

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

2.3.7 Restart the PleaseReview Services

For any configuration changes to take effect, the PleaseReview services (TaraWeb and TaraService) must be restarted. This can be done from the menu within the AdminClient. Configuration changes will NOT take effect until the services are restarted.

3 Installing the CARA Integration

3.1 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.

3.1.1 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)

3.1.2 The groups of CARA users who will use PleaseReview

In order for the PleaseReview CARA integration to decide who will be permitted to see the PleaseReview specific menu items and the PleaseReview inbox, a list of groups for those users will be required. It is advisable that these groups are created as “locked” workgroups in PleaseReview after being created in CARA. In this way, the members of the PleaseReview workgroup will automatically be synchronized with the source CARA group by PleaseReview.

3.1.3 Locate the CARA webapps directory

All file system paths in this installation guide are relative to the location of the CARA web application. This is normally

```
%CATALINA_HOME%\webapps\cara
```

where % CATALINA_HOME% is where the Apache Tomcat application server is installed (\$CATALINA_HOME on Unix/Linux). From now on this directory will be referred to as \cara and all paths will be relative to it.

3.2 Installing the software

3.2.1 Installing the files

Extract the provided zip file (PleaseReview_CARAI_UI_xxx.zip) into a temporary directory. It will contain the following folders:

- CustomActions
- CustomJSP
- Dictionaries
- DQL
- Forms
- Images
- Styles
- ViewConfigChanges

3.3 Creating DocBase objects

All of the tasks carried out in this section are carried out using DQL. To do this, log into CARA as an Admin user with Superuser privileges and bring up the DQL window.

3.3.1 PR_REVIEW_TASK object

Open the file \DQL\create_pr_review_task.txt in a text editor and copy each DQL statement into the CARA DQL window and execute it.

Step not required Step Completed Step Failed

Date and Signature:

3.3.2 PleaseReview DocBase Roles

Now open the file `\DQL\create PleaseReview roles.txt` and copy each DQL statement into the CARA DQL window and execute it.

This creates the roles `"cara_pleasereview_owner"`, `"cara_pleasereview_participant"` and `"cara_pleasereview_admin"`, which are used to determine who will be permitted to see the PleaseReview specific menu items and the PleaseReview inbox within CARA.

Please note, during PleaseReview upgrades only DQL statements relating to DocBase roles that don't already exist will need to be executed.

Step not required Step Completed Step Failed

Date and Signature:

3.3.3 Groups for locked workgroups

If you intend to create "locked" workgroups in PleaseReview, as recommended in section The groups of CARA users who will use PleaseReview, these will be configured as sync'd workgroups in PleaseReview later.

The file `\DQL\create example PleaseReview workgroup.txt` provides an example of how to do this for a group called `"example_group"`. For each group you wish to create, you will need to replace each occurrence of the word "example" with the appropriate group name prefix (for example, `sales_group`, `support_group`, etc.).

Each group created by the DQL script will have a base group and four sub groups. The sub groups represent the roles the individual users will have within PleaseReview. When users are added to the groups within Cara, they will be added to the group that represents their maximum PleaseReview role. Non-admin users should only be added to one of the sub groups that is most applicable to them.

For example, if the base group is called `"sales_group"`, all of the users intended to only review documents will be added to Cara group `"sales_group_reviewers"` while those users who may create reviews and contribute to other reviews will be in `"sales_group_author-contributor"`. To add users with admin roles, see section Validate new Administration functionality.

Each of the amended DQL statements should then be copied into the CARA DQL window and executed. The DQL window can now be closed.

Step not required Step Completed Step Failed

Date and Signature:

3.4 Installing the PleaseReview icons

Copy the files prlogo.png, prlogoadmin.png and prlogopdf.png from

```
\Images
```

to

```
\cara\images\icons\16x16.
```

Now copy the file prlogo32.png, prlogoadmin32.png and prlogopdf32.png from

```
\Images
```

To

```
\cara\images\icons\32x32.
```

Please note, this step will need to be repeated following any CARA upgrades being applied.

Step not required Step Completed Step Failed

Date and Signature:

3.5 Installing the PleaseReview custom actions

3.5.1 Custom Code

Copy the folder and its contents from

```
\CustomJSP\pleasereview
```

Into

```
\cara\custom\pleasereview
```

This contains all the custom code, needed by the custom actions.

Please note, this step will need to be repeated during upgrades if directed in the release notes.

Step not required Step Completed Step Failed

Date and Signature:

3.5.2 Custom Actions

Log into CARA as an Admin user with Superuser privileges, and open the `Control Panel`. On the `General` tab, press the `Custom Actions` button, which will open the `Custom Actions` form. You will now need to import the seven PleaseReview specific Custom Actions, which reside in the folder `\CustomActions`.

To import each custom action, press the `Import` button and then browse to the appropriate xml file for the custom action to be imported, on the file selector. Pressing the `Open` button causes the custom action to be imported, before closing the file selector and returning the `Custom Actions` form.

The custom actions that must be loaded are:

- Enter Review.xml

- My PleaseReview Settings.xml
- New Review (with documents).xml
- New Review (without documents).xml
- New Review as PDF (with documents).xml
- Review Control Panel.xml
- Review Distribution Lists.xml
- View Report.xml
- Workgroup Management.xml

Finally press the `Close` to shut down the `Custom Actions` form.

Keep the `Control Panel` open, as will be needed in the following task.

Step not required Step Completed Step Failed

Date and Signature:

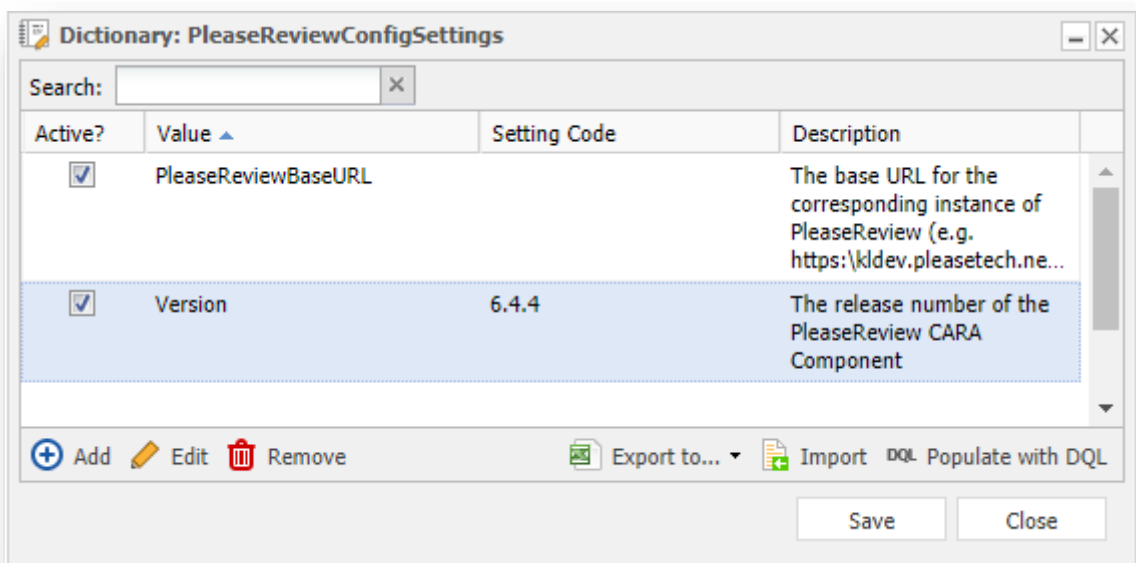
3.6 Installing the PleaseReview dictionaries

3.6.1 PleaseReviewConfigSettings

On the `Data` tab of the `Control Panel`, press the `Dictionaries` button, which will open the `Dictionary Manager` form. You will now need to import and configure the `PleaseReviewConfigSettings` dictionary.

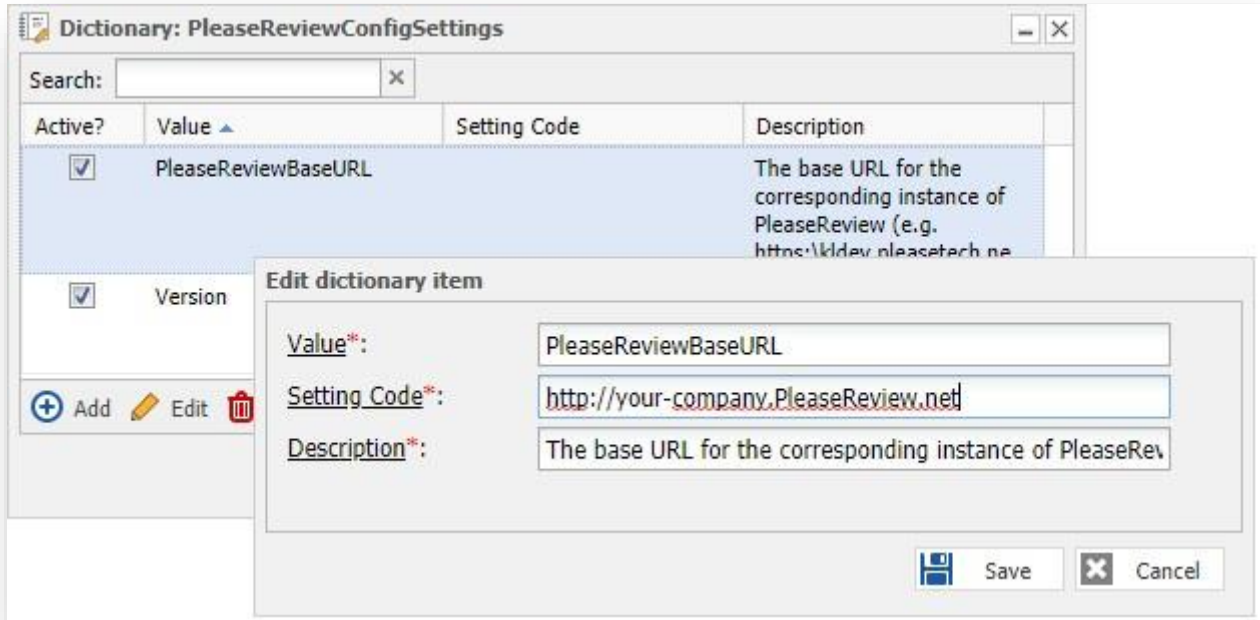
To import the dictionary, press the `Import` button and then on the file selector, browse to the file `\Dictionaries\PleaseReviewConfigSettings.xml`. Now press the `Open` button to import the dictionary, close the file selector and return the `Dictionary Manager` form.

Now update the `PleaseReview` configuration settings for your environment. To do this select `PleaseReviewConfigSettings` in the `Dictionary Manager` form and then press `Edit`. The below screen will appear:



Next highlight the value `PleaseReviewBaseUrl` and press `Edit`. In the `Setting Code` field enter the base URL value for your PleaseReview instance, as discussed in section. Please note this URL value MUST NOT end with a `'` character.

For example:



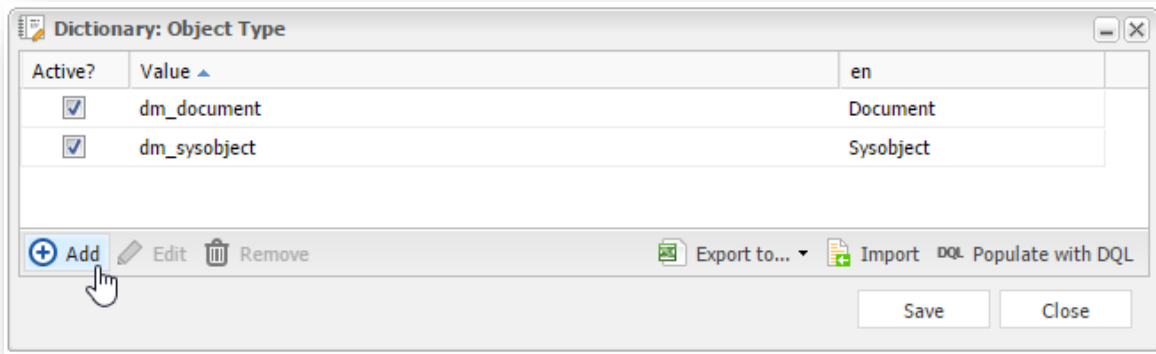
Now press `Save` and `Save` again to return to the `Dictionary Manager` form.

Step not required Step Completed Step Failed

Date and Signature:

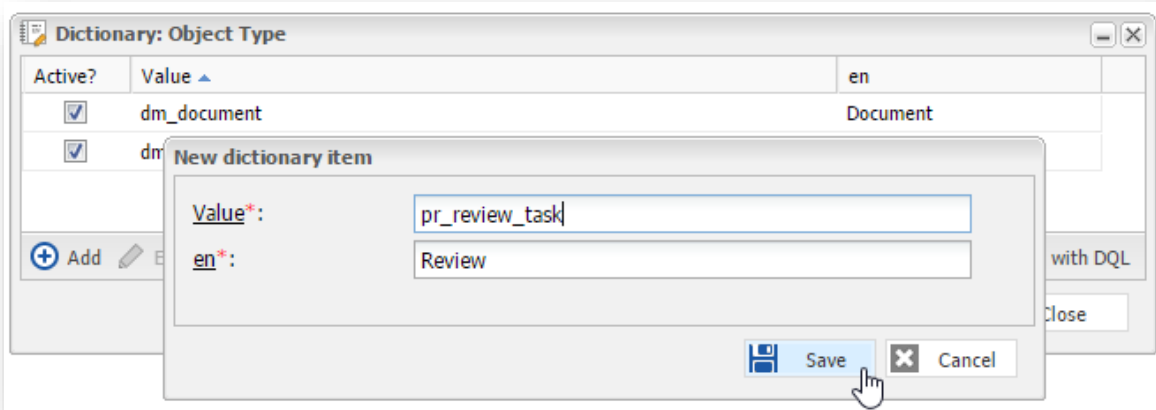
3.6.2 Object Types

Whilst still in the `Dictionary Manager` form, it is now necessary to add a new object type for the `pr_review_task` object created in section `PR_REVIEW_TASK` object. To do this select `Object Type` on the `DictionaryManager` form, so that it becomes highlighted and then press `Edit`. The below screen will appear:



Now press **Add**, and enter the following values, as shown below:

- Value: pr_review_task
- en: Review *



* - The value en, may differ based upon your personal local settings. Please adjust accordingly.

Next press **Save** and **Save** again to return to the **Dictionary Manager** form, followed by close. You should now be back on the **Control Panel** ready for the next step.

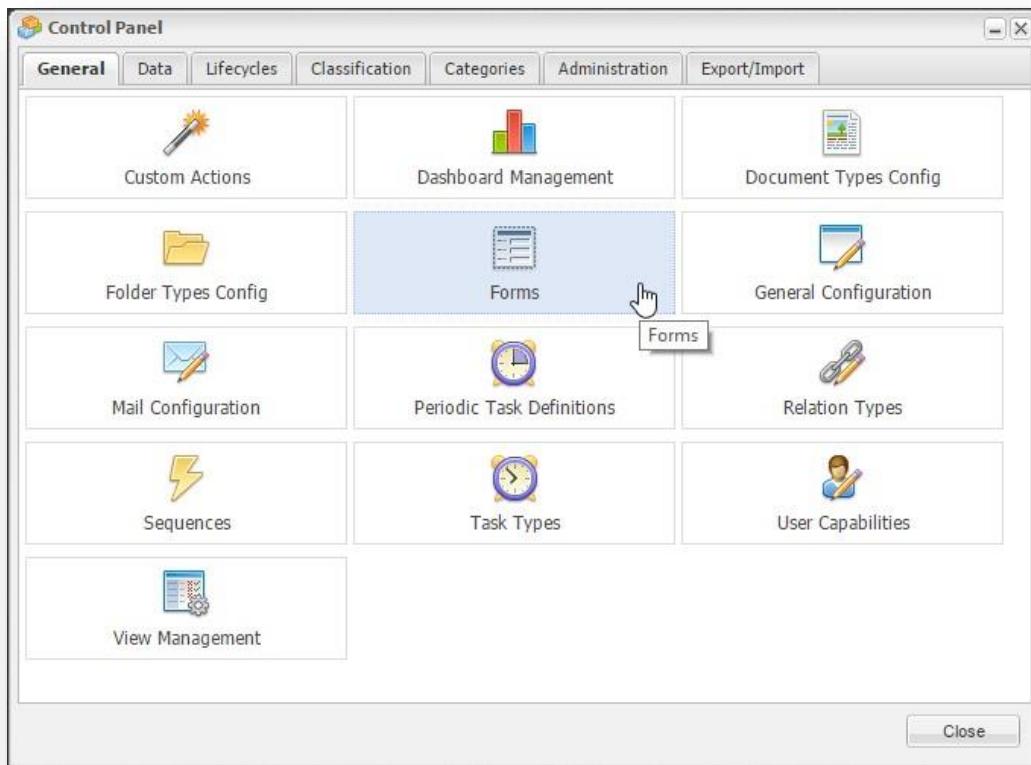
Step not required Step Completed Step Failed

Date and Signature:

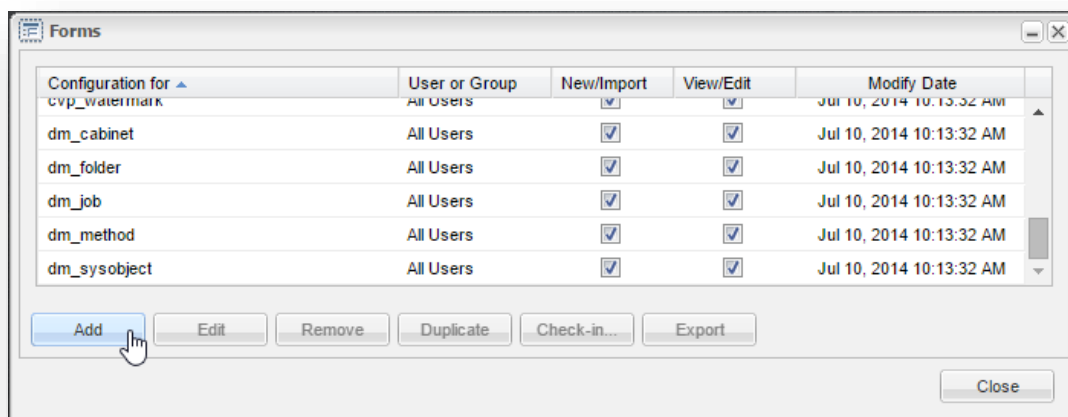
3.7 Installing the PleaseReview forms

3.7.1 pr_review_task Form

Select the **General** tab of the **Control Panel**, press the **Forms** button, as shown below. Please note - If the **Forms** button doesn't exist on the **General** tab, you will temporarily need to enable it. This is controlled under **User Capabilities**, in the **Configuration** section. The **Forms** entry must be ticked for it to appear. This tick-box, should be returned to its initial value once this step is completed.



The **Forms** page will open (as shown below), on which you will now need to create a form configuration for the `pr_review_task` object, before importing the form, as per the following instructions.



Press the **Add** button, and a form will be displayed as shown below:

Please select user or group to which this configuration applies and one or both of the New Import & View Edit Options. Please also enter a Configuration Name and select the Base Object Type.

User or group*: Users

All Users

Selected user or group:

New and Import Properties

View and Edit Properties

Base object type*: pr_review_task

Configuration name*: pr_review_task

Save Cancel

All the default values should be used except for the Base object type for which you should select the value `pr_review_task`. Next press `Save`, which will display the following blank `Forms` page:

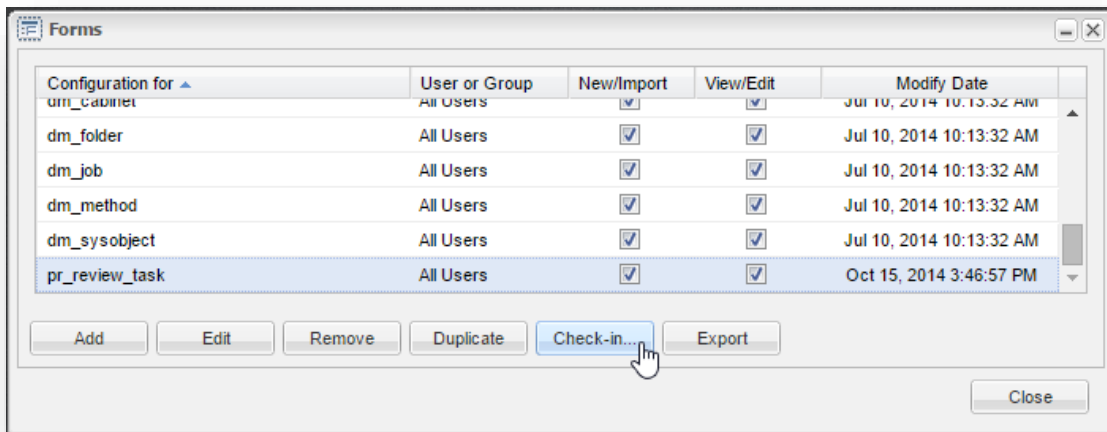
Form: All Users - New Import View Edit (pr_review_task)

Form

Add Edit Move up Move down Remove

Save Cancel

Press **Save** again which will close this page and return you to the **Forms** page, as shown:



Now select the entry `pr_review_task` and press the **Check-in...** button. In the file browser, navigate to and select the file `\Forms\All Users - New Import View Edit (pr_review_task).xml` and press **open**. The form will then load.

You can now close the **Forms** page, and return to the **Control Panel** ready for the next step.

Step not required Step Completed Step Failed

Date and Signature:

3.8 Installing the PleaseReview custom configuration

3.8.1 Export Existing CARA Configuration

As some of the PleaseReview configuration changes involve updating your existing CARA configuration, it will first of all be necessary to export details of what you currently have.

On the **Control Panel** go to the **Export/Import** tab, press the **Configuration export** button. You will be prompted to specify a location into which to save the export file. The default filename will look something like `backup_CARAPROD_10-8-18 4_19 PM.zip`. Rename this to replace the 'backup_' prefix with 'pleaseReview_', so it now becomes `pleaseReview_CARAPROD_10-8-18 4_19 PM.zip`. Press the **Save** button to export the configuration to the backup file.

Also, take a copy of this backup file and store it somewhere safe, in case you should ever wish to back out the PleaseReview configuration changes.

Step not required Step Completed Step Failed

Date and Signature:

3.8.2 Adding View SnapLists

The custom PleaseReview items should be located within one or more views within your CARA environment, for views that are associated with an object type of `dm_document` and against a view which is visible. The custom change involves the addition of two new review SnapLists called 'My Reviews' and 'Recycle bin'.

For each of the views in your environment in which you wish these items to appear, all of the changes outlined in this section will need to be made. Please note that all of the examples shown below are applied to the default view, for which the configuration details are contained in the file `\Views\Default.xml`.

First unzip the export zip file created in section Export Existing CARA Configuration, `pleaseReview_CARAPROD_10-8-18_4_19_PM.zip` would unzip to the directory `pleaseReview_CARAPROD_10-8-18_4_19_PM`. From now on this directory will be referred to as `\backup` and all paths will be relative to it.

Open the file in `\backup\Views\Default.xml` in a text editor for editing.

3.8.2.1 SnapLists

Look for the section containing the XML SnapList tags, which contain details of all the SnapLists used in your view, as shown below:

```
<snapLists>
...
...
...
</snapLists>
```

All of the SnapLists used in your view will be contained between these tags with each SnapList being contained within its own `<snapList>` tags. The order the entries are displayed in the file relates to the order they are listed in your view.

Now open the file `\ViewConfigChanges\PleaseReviewSnapLists.xml` and copy the entire contents between the `<snapLists>` tags in the appropriate place.

This section should now look something like:

```
<snapLists>
  <snapList path="PleaseReview" label="My Reviews" icon="prlogo.png">
    <objectType>pr_review_task</objectType>
    <allVersions>>false</allVersions>
    <query> inbox_owner_ref=USER and deleted_review='0' and
(lower(review_title) like '%${filter}%' or lower(review_id) like '%${filter}%')
and (my_status != 'Review Owner' or parent_review_id = '-1')</query>
    <columns>
      <column>
        <alignment>left</alignment>
        <label>Due Date</label>
        <name>due_date</name>
        <sortByAlias>>false</sortByAlias>
        <sortable>>true</sortable>
        <visible>>true</visible>
        <width>150</width>
      </column>
      <column>
        <alignment>left</alignment>
        <label>Review Title</label>
        <name>review_title</name>
```

```

        <sortByAlias>>false</sortByAlias>
        <sortable>>true</sortable>
        <visible>>true</visible>
        <width>200</width>
    </column>
    ...
    ...
    ...
</snapList>
<snapList path="PleaseReview" label="Recycle bin" icon="bin.png">
    <objectType>pr_review_task</objectType>
    <allVersions>>false</allVersions>
    <query> inbox_owner_ref=USER and deleted_review='1' and
(lower(review_title) like '%${filter}%' or lower(review_id) like '%${filter}%')
and (my_status != 'Review Owner' or parent_review_id = '-1')</query>
    <columns>
        <column>
            <alignment>left</alignment>
            <label>Due Date</label>
            <name>due_date</name>
            <sortByAlias>>false</sortByAlias>
            <sortable>>true</sortable>
            <visible>>true</visible>
            <width>150</width>
        </column>
        ...
        ...
        ...
    </snapList>
<snapList path="PleaseReview" label="All Reviews (Admin)"
icon="bin.png">
    <objectType>pr_review_task</objectType>
    <allVersions>>false</allVersions>
    <query>(lower(review_title) like '%${filter}%' or lower(review_id)
like '%${filter}%') and my_status = 'Review Owner'</query>
    <columns>
        <column>
            <alignment>left</alignment>
            <label>Due Date</label>
            <name>due_date</name>
            <sortByAlias>>false</sortByAlias>
            <sortable>>true</sortable>
            <visible>>true</visible>
            <width>150</width>
        </column>
        ...
        ...
        ...
    </snapList>
</snapLists>

```

Now save and close the view file.

3.8.3 Reimporting PleaseReview Configuration into CARA

Now the configuration changes have been made, the next step is to create an import file. To do this zip the contents of the updated export folder. For example folder `pleaseReview_CARAPROD_10-8-18_4_19_PM` would be zipped into a file called `pleaseReview_CARAPROD_10-8-18_4_19_PM.zip`.

Next you will need to import the configuration data into CARA. To do this, go to the `Export/Import` tab of the `CARA Control Panel` and press the `Configuration import` button. Now select the file `pleaseReview_CARAPROD_10-8-18 4_19 PM.zip` that you have just created and press the `Configuration import` button. Once the import completes you will be asked to specify the name of a file to write the import report to. Just select the suggested filename and press `Save`.

The configuration import is now complete. Stay in the `Control Panel` ready for the next step.

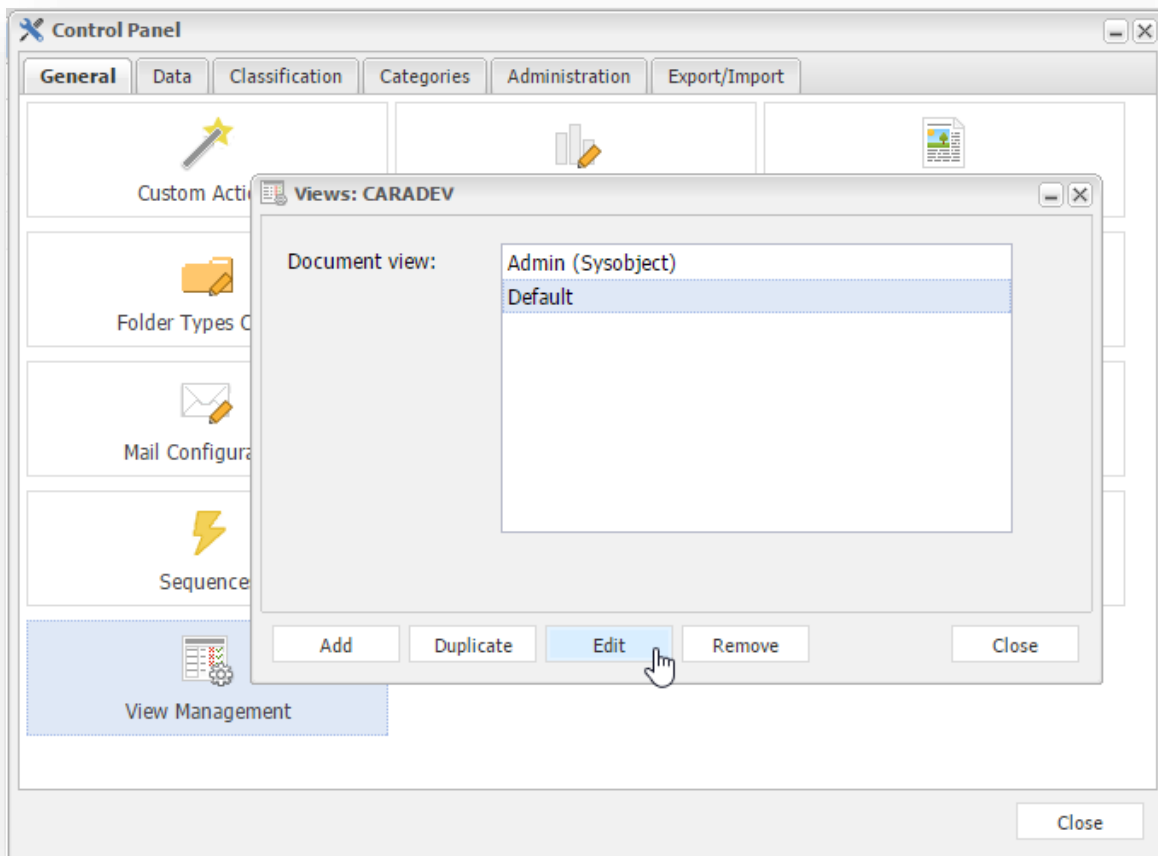
Step not required Step Completed Step Failed

Date and Signature:

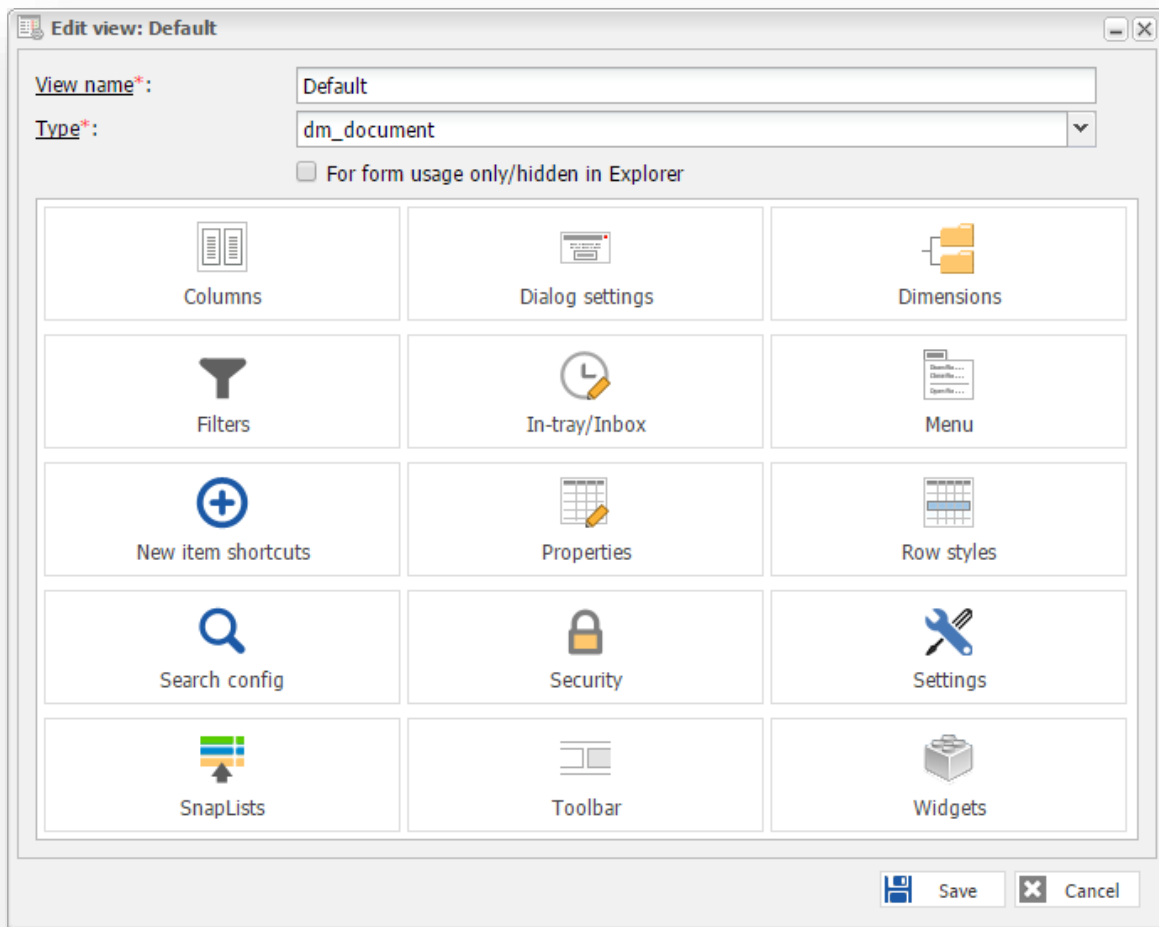
3.9 Adding Menu Actions

For each of the views in your environment against which review SnapLists were created in section `Adding View SnapLists`. As before, all of the examples shown below are applied to the default view.

On the `CARA Control Panel` go to the `General` tab, press the `View Management` button. From the list of available views, select the desired one and press `Edit`, as shown below:

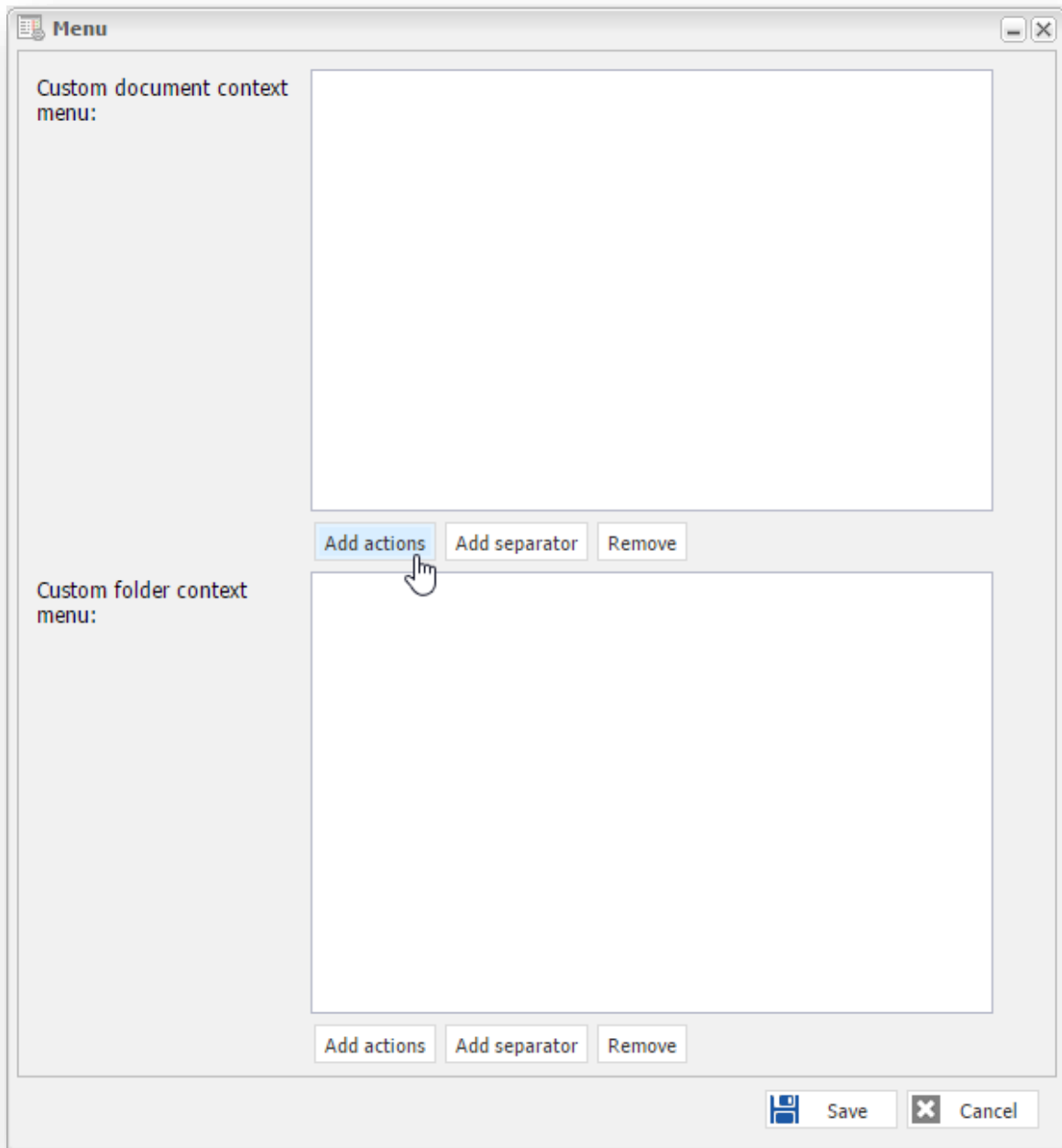


The following screen will be displayed:



3.9.1 Menu

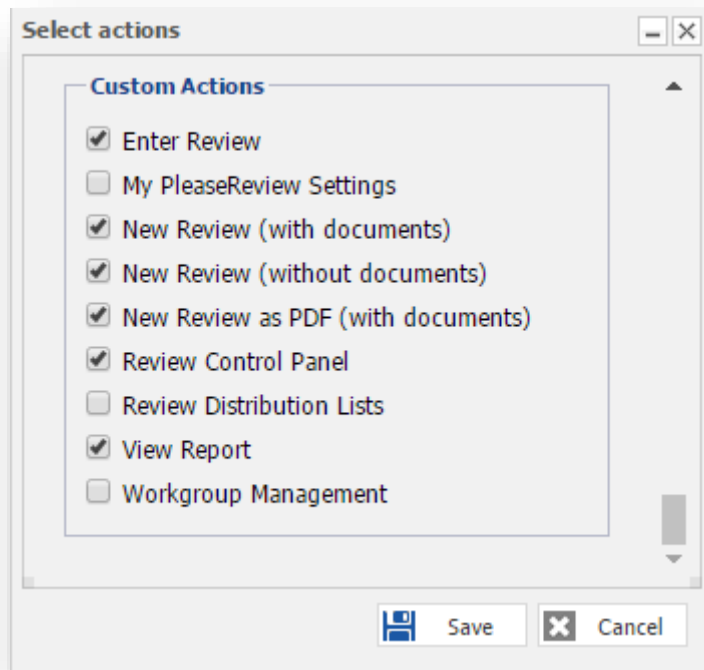
On the `Edit` view page, press the `Menu` button, to open the `Menu` page. Now press the `Add actions` button below the `Custom document context menu` section, as shown below:



The `Select actions` page will appear. Scroll down to the bottom right of the page to the `Custom Actions` section and check the items:

- Enter Review
- New Review (with documents)
- New Review (without documents)
- New Review as PDF (with documents)
- Review Control Panel
- View Report

as shown below:



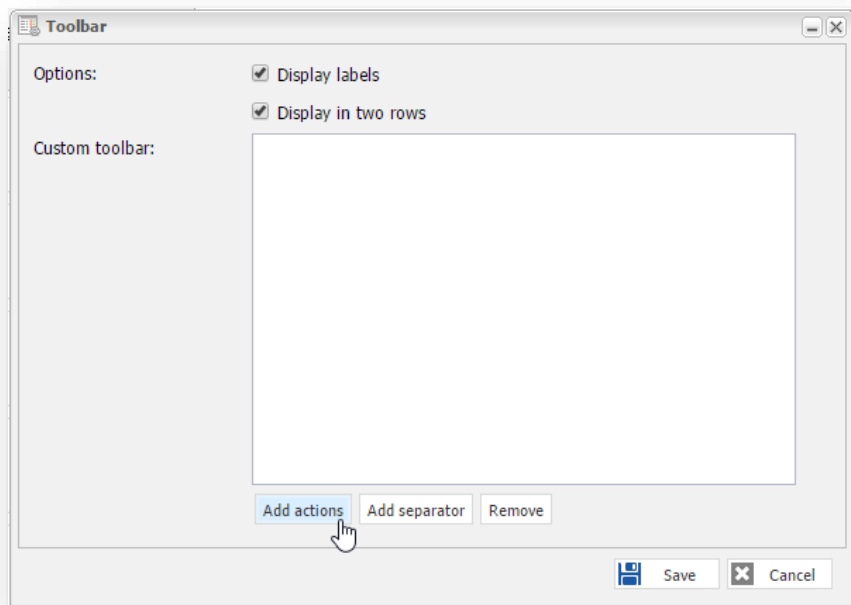
Next press `Save` and `Save` again to return to the `Edit view` page.

Step not required **Step Completed** **Step Failed**

Date and Signature:

3.9.2 Toolbar

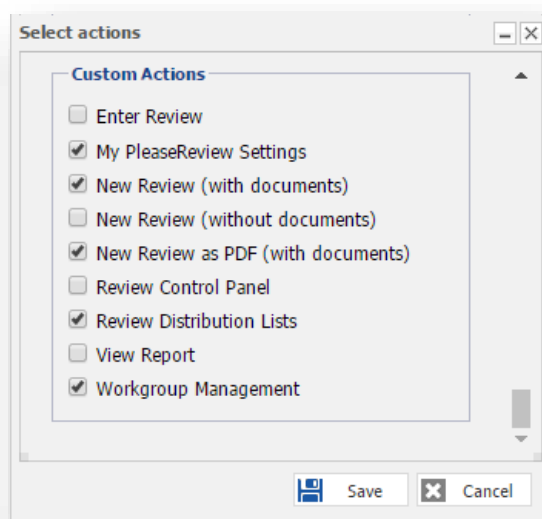
Next, press the **Toolbar** button on the on the **Edit view** page, to open the **Toolbar** page. Now press the **Add actions** button, as shown below:



The **Select actions** page will appear. Scroll down to the bottom right of the page to the **Custom Actions** section and check the items:

- My PleaseReview Settings
- New Review (with documents)
- New Review as PDF (with documents)
- Review Distribution Lists
- Workgroup Management

as shown below:



Next press `Save` and `Save` again to return to the `Edit view` page.

Then press `Save` again to return to the `Views` page, clicking `No` on the confirmation page.

Now click `Close` return to the `Control Panel`.

All the configuration changes have now been made and as a result the `Control Panel` can now be closed.

Step not required **Step Completed** **Step Failed**
Date and Signature:

3.9.3 Recycle CARA Web Server

Recycle the CARA webserver to ensure all the changes applied in this section take effect.

Step not required **Step Completed** **Step Failed**
Date and Signature:

3.9.4 Configuring the PleaseReview email templates

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 CARA user interface.

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

The actions below need to be performed on the PleaseReview server as it sends these emails, not the CARA server. The `Runtime` directory is a sub-directory of the location where PleaseReview is installed.

To install these special email templates, do the following:

- Locate the directory `Runtime/config/EmailTemplates` in the PleaseReview installation directory.
- Copy the contents of the folder `/EmailTemplates/Documentum.cara` to `/EmailTemplates/Documentum`, overwriting any files which already exist. There should now be a directory called `EmailTemplates/Documentum` inside PleaseReview.
- Rename the file `EmailTemplates/Documentum/caraur.xml.template` to `EmailTemplates/Documentum/caraur.xml` if it doesn't already exist. Then edit the `Runtime/config/EmailTemplates/Documentum/caraur.xml` and replace `[[CaraURL]]` with the root part of the URL the users use to access CARA.

For example (on a CARA server using Apache Tomcat, with a database called 'TEST') it would be something like <http://CARA:8080/cara/#TEST%5BDefault%5D> - note that the "%5BDefault%5D" must be included and there must **not** be a / character on the end of the URL. E.g.

```
<xsl:variable  
name="caraur">http://CARA:8080/cara/#TEST%5BDefault%5D</xsl:variable>
```

Any user using PleaseReview and authenticated by CARA using their Documentum credentials will see these emails, but users who are not authenticated by CARA will see the standard emails that will return then into the standard PleaseReview user interface.

Step not required **Step Completed** **Step Failed**

Date and Signature:

3.9.5 Applying CARA Theme in PleaseReview Screens

If you are using the default `Gray Theme` within CARA this step is not required, as the PleaseReview screens default to gray also. If however you wish to apply the `Blue Theme` then the following will need to be done.

Locate the directory `TaraWeb/Styles/documentum` in the PleaseReview installation directory. In that folder, replace the file `tara.css` with the file `/Styles/Blue Theme/tara.css` from the unpacked zip file

Please note that for any future updates to PleaseReview, this step will need to be repeated.

Step not required **Step Completed** **Step Failed**

Date and Signature:

3.9.6 Recycle Tara Service

Recycle the PleaseReview TaraService and TaraWeb application pool, in order to ensure all of the changes applied in section Required configuration changes, and section Configuring the PleaseReview email templates take effect.

Step not required **Step Completed** **Step Failed**

Date and Signature:

3.10 Testing the installation

This test will involve creating a test review from within the CARA UI and checking it is then displayed in the My Reviews SnapList correctly.

3.10.1 Sync Test User into PleaseReview

For this pick a user who is a member of one of the groups defined earlier (see section Groups for locked workgroups). This user must have author permissions within PleaseReview and hence must have been sync'd into a suitable group within PleaseReview. For example, if you had called your workgroup "sales_group", as in the example in section Groups for locked workgroups, you would need to assign them to the documentum group "sales_group_author" to ensure they have author permissions within PleaseReview.

The group "sales_group" would then need to be re-sync'd within PleaseReview. Remember that no other sub groups should be synchronized to PleaseReview, only the base group.

3.10.2 Set Test User Permissions

What PleaseReview items (toolbars, SnapLists and action menu items) a user will see in CARA are controlled by whether the users are assigned to the "cara_pleasereview_owner", "cara_pleasereview_participant" and "cara_pleasereview_admin" roles within CARA.

As the test user is an Author they will need to be assigned to the role "cara_pleasereview_owner" as this will give them the ability to see the New Review buttons within CARA. This should be done now using an admin account.

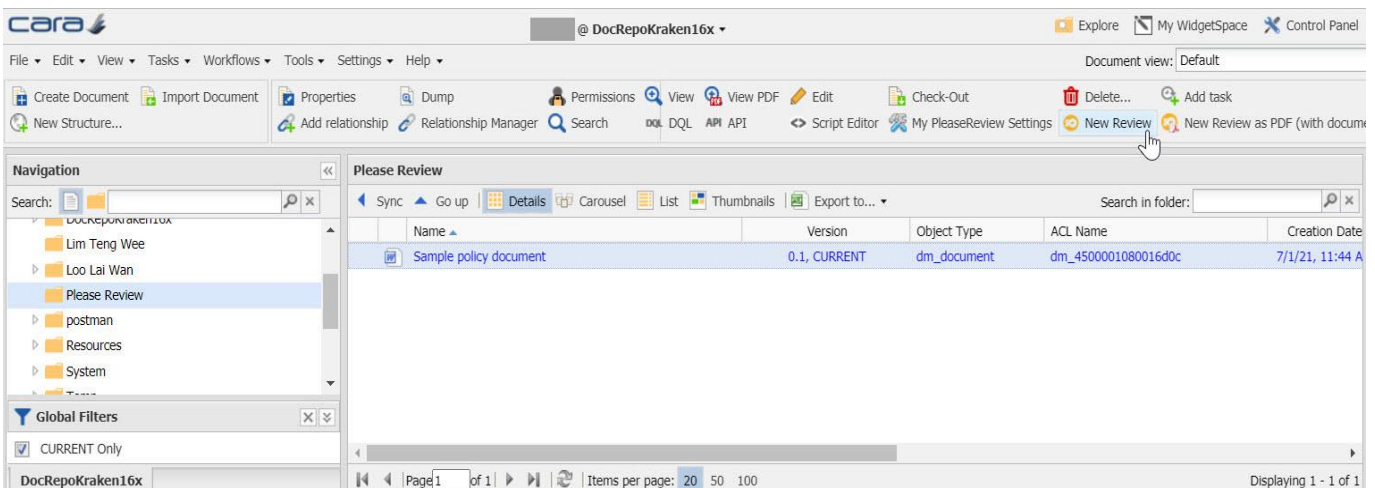
Please note, that until a user has been sync'd into PleaseReview as discussed in section Sync Test User into PleaseReview, they will not be able to use the PleaseReview functionality within CARA. As a result it is not recommended to assign the users either "cara_pleasereview_owner" or "cara_pleasereview_participant" roles until after the sync has occurred.

In addition this user should be given VERSION permission within CARA, as they will need this in order to be able to check any documents reviewed in PleaseReview back into CARA.

3.10.3 Create New Review

Log into CARA as the test author user. Please note, this user must also be able to log in to PleaseReview as well, using their Documentum credentials.

First browse to a cabinet in the CARA interface and select a Word document that you have version permission on so that it is highlighted. Now press the "New Review" button in the toolbar menu as shown below, which will launch the PleaseReview New Review creation wizard. You should not be asked to log in to PleaseReview at this point because you will have been automatically authenticated to PleaseReview via Documentum.



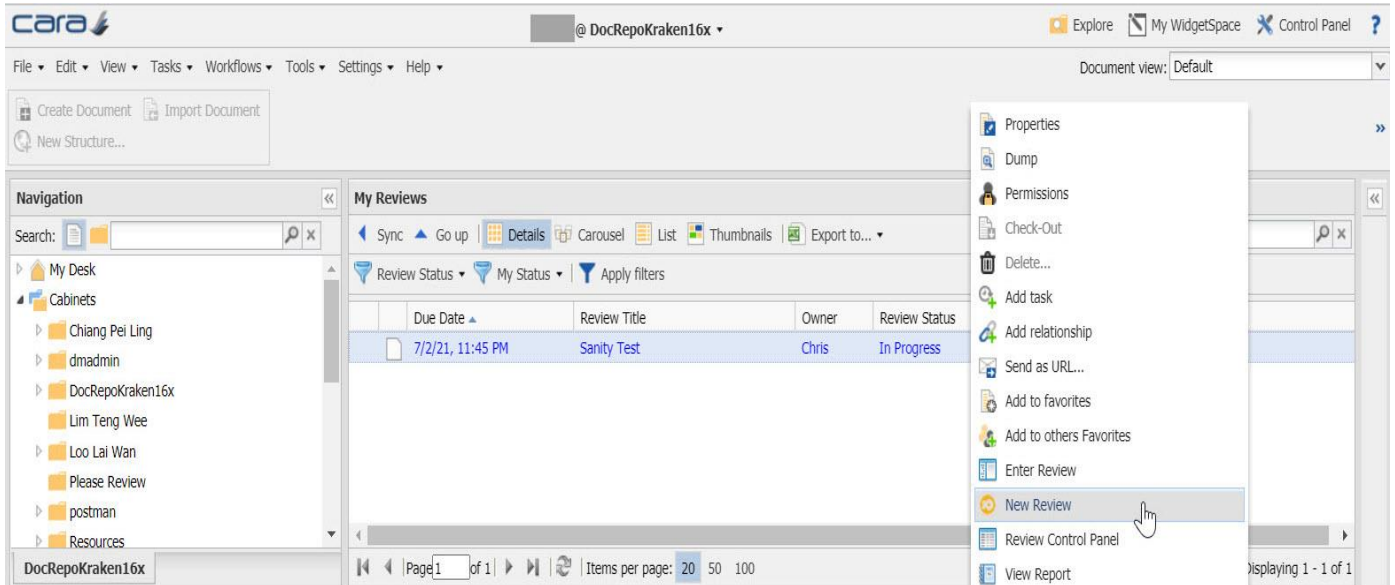
The screenshot shows the CARA interface with the 'Please Review' section active. The toolbar includes a 'New Review' button, which is highlighted by a mouse cursor. The interface also shows a navigation pane on the left with a search bar and a list of folders, including 'Please Review'. The main content area displays a table with columns for Name, Version, Object Type, ACL Name, and Creation Date. The table contains one entry: 'Sample policy document' with version '0.1, CURRENT' and creation date '7/1/21, 11:44 A'.

Name	Version	Object Type	ACL Name	Creation Date
Sample policy document	0.1, CURRENT	dm_document	dm_4500001080016d0c	7/1/21, 11:44 A

Follow the PleaseReview review creation wizard through as normal. Once the wizard is complete, start the review and then close the New Review wizard pane.

3.10.4 Validate Review SnapList entry

In the CARA Navigation Pane, on the left-hand pane, expand out the SnapLists and select PleaseReview. The sub sections of "My Reviews" and "Recycle bin" will appear. Double click on "My Reviews" and check the "PleaseReview inbox" appears showing the review you just created in the previous step. Select the review, and then right click selecting "Enter Review", as shown below:



The Review should open in the standard PleaseReview interface, at which point you should again not be prompted to log in. Now close the review window by pressing the “leave the review” button and log out of CARA.

Step not required Step Completed Step Failed

Date and Signature:

3.10.5 Validate new Administration functionality

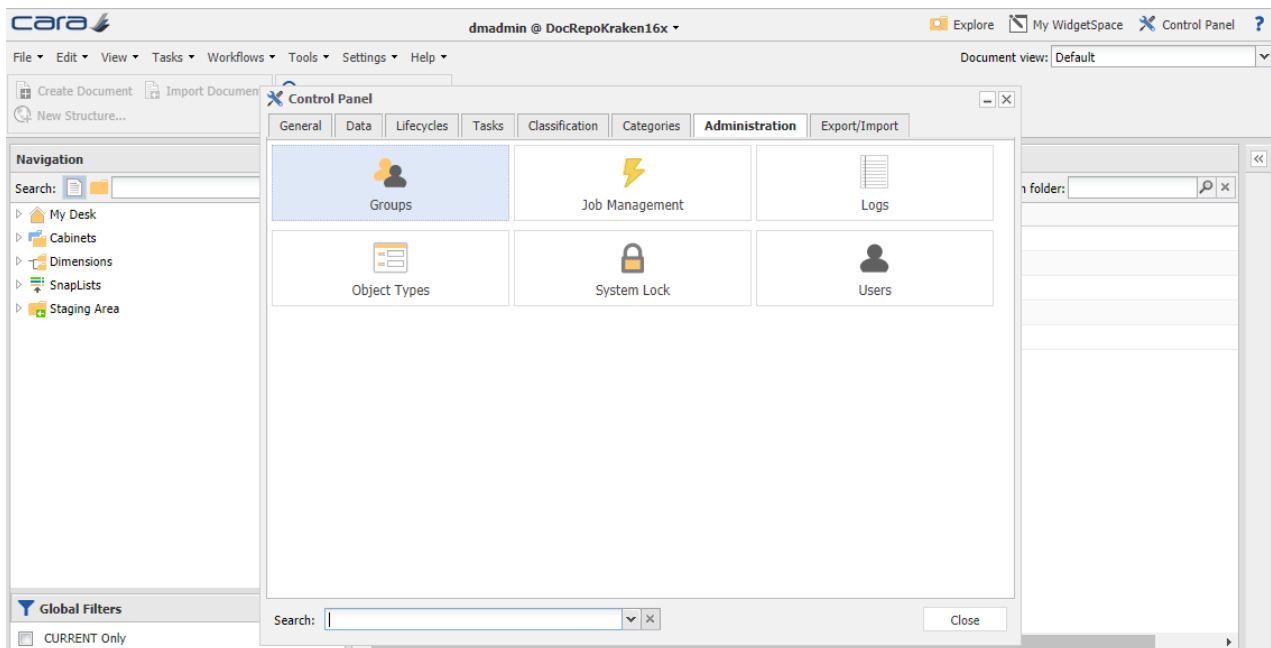
PleaseReview 6.1.6 and above introduces two new Administration features that are available to users with the correct permissions. The functionality allows Administrators to:

- Edit the participants and owners (through Review Transfer) of reviews owned by any users
- Edit the members of PleaseReview Workgroups

Access to this functionality requires the users to be in specific groups within CARA and to have PleaseReview permissions set manually.

3.10.5.1 Grant appropriate privileges and permissions

To make the Administration functionality accessible to a user, log into CARA as an Admin user with Superuser privileges, and open the Control Panel. On the Administration tab, press the Groups button, which will open the Group management form.



Name	Description	Owner
admingroup		dmadmin
cara_cancel_checkout_managers		dmadmin
cara_config_managers		dmadmin
cara_consumer	Consumer	dmadmin
cara_contributor	Contributor	dmadmin
cara_pleasereview_admin	User who can perform PleaseReview admin tasks from within CARA	dmadmin
cara_pleasereview_owner	User who can create and manage PleaseReview reviews from within CARA	dmadmin
cara_pleasereview_participant	User who can participate in PleaseReview reviews from within CARA	dmadmin
cara_power_user	Power user	dmadmin
cara_structure_creators		dmadmin
cara_task_managers		dmadmin
cara_template_managers		dmadmin
dce_create_room_groups	User who can create groups in rooms	dmadmin
dce_dataatable_creator		dmadmin
dce_hidden_users	Members in this role will not be visible to other users.	dmadmin
dce_room_creator	User who can create rooms	dmadmin

Page 1 of 4 | Displaying 1 - 20 of 78

Buttons: Add, Edit, Delete, Close

You will now need to add your user(s) to the `cara_pleasereview_admin` role and, if you also require these users to be able to create or participate in reviews, the `cara_pleasereview_owner` role or if you require them to just participate in reviews, the `cara_pleasereview_participant` role.

Edit role: cara_pleasereview_participant

Name*:

Description:

Class*:

Email Address:

Owner*:

Administrator:

Private

Dynamic

Treat users as members

Treat users as non-members

User Members:

Group Members:

Buttons: Save, Cancel

In section Groups for locked workgroups, you will have created a set of groups for your PleaseReview users. If you have previously added your intended administration user(s) to any of these groups, please remove them.

Finally, add your user(s) to the top level group. So, for example, if the top level group is called "sales_group", add your administration user(s) to this group.

All the CARA based configuration changes have now been made and as a result the Control Panel can now be closed.

You should now log onto the PleaseReview system as an administrative user and re-sync the group "sales_group" (from the example). Remember that no other sub groups should be synchronized to PleaseReview, only the top level group.

As you have added your administration user(s) to the top level group, those user(s) will NOT be granted any PleaseReview privileges, other than the default. You will need to make these grants manually, ensuring the users have one of the Admin privileges – for example, Admin only.

If you also require these users to be able to create or participate in reviews, they will need one of the extended privileges – for example Admin-Author-Contributor.

3.10.5.2 How to access the new Administration functionality

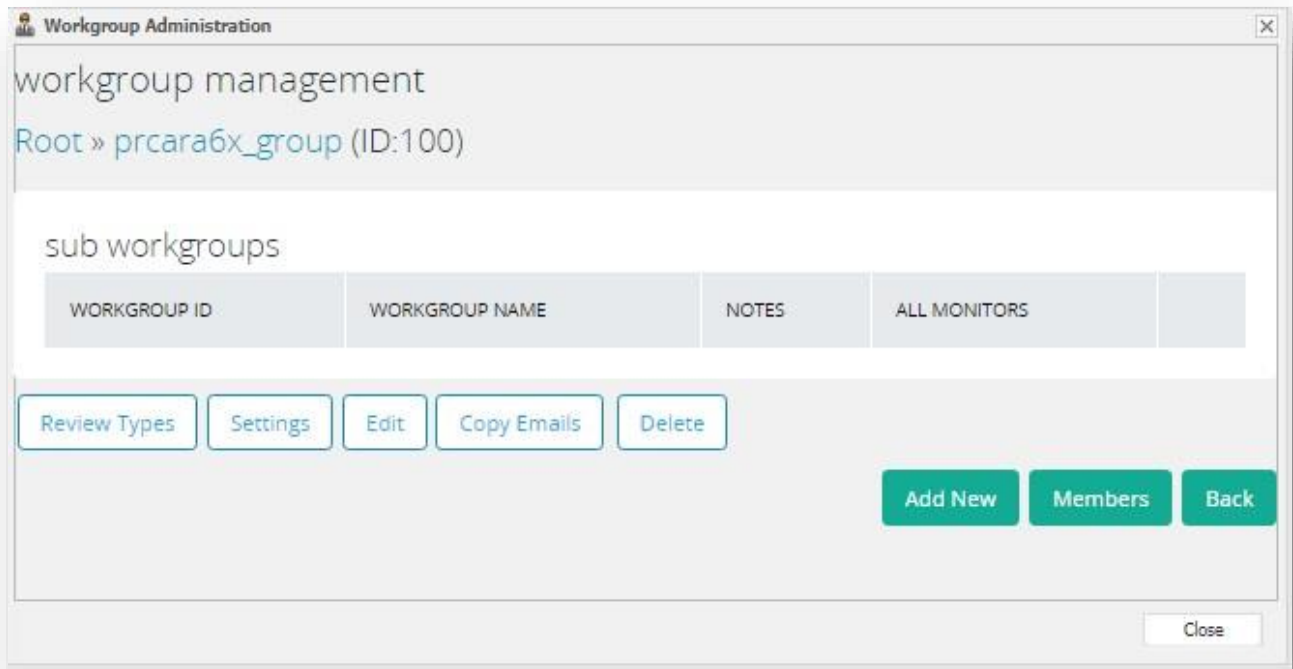
At this point, the new administration functionality will be accessible to the users specified.

To begin, login to CARA as one of the administrative users.

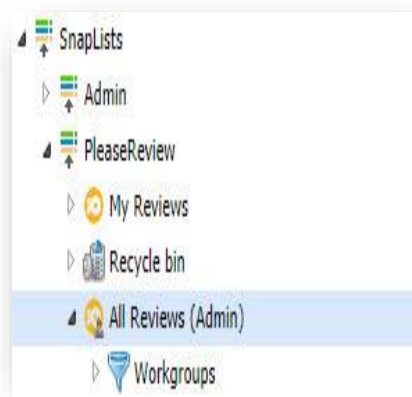
To administer workgroups, press the "Workgroup Administration" button on the CARA toolbar:



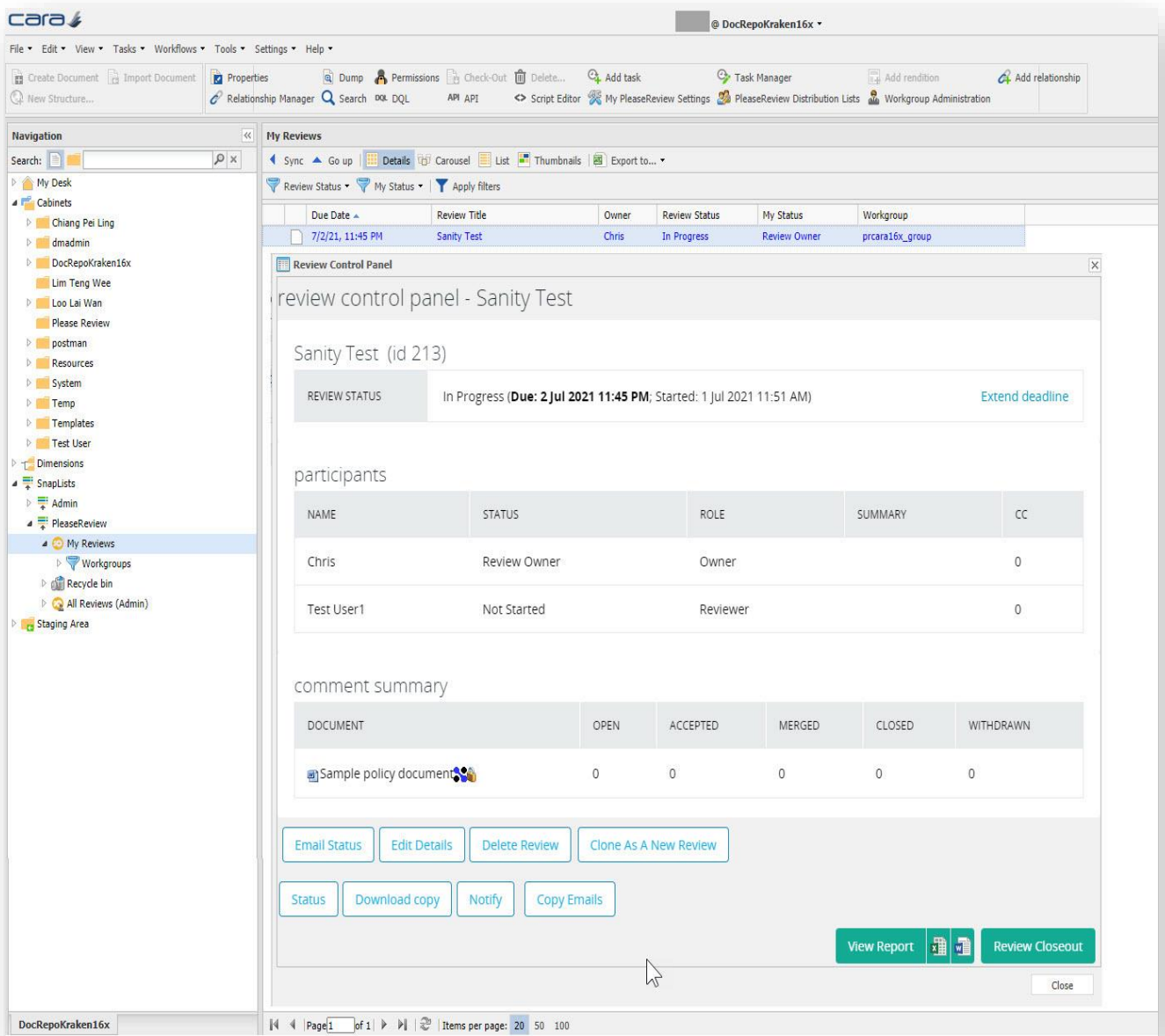
This will open up the Workgroup Management screen:



To Administer other users' reviews, find the reviews in the new "All Reviews (Admin)" SnapList:



Use the "Review Control Panel" option from the right click menu to open the control panel where the review can be edited:



The screenshot shows the 'My Reviews' section of the PleaseReview interface. A 'Review Control Panel' window is open for a review titled 'Sanity Test (id 213)'. The review status is 'In Progress' with a due date of '2 Jul 2021 11:45 PM'. The interface includes a navigation pane on the left, a main content area with a table of participants, a comment summary table, and various action buttons at the bottom.

Due Date	Review Title	Owner	Review Status	My Status	Workgroup
7/2/21, 11:45 PM	Sanity Test	Chris	In Progress	Review Owner	prcara16x_group

NAME	STATUS	ROLE	SUMMARY	CC
Chris	Review Owner	Owner		0
Test User1	Not Started	Reviewer		0

DOCUMENT	OPEN	ACCEPTED	MERGED	CLOSED	WITHDRAWN
Sample policy document	0	0	0	0	0

4 Appendix A

4.1 Features Not Supported

This section lists any PleaseReview features, which are not supported when using PleaseReview in conjunction with CARA on Documentum Server:

- The PleaseReview groups “admin only”, “monitor only”, “reviewer-delegator” and “contributor-delegator”, should not be assigned to CARA users.
- It is not possible to embed the actual document review interface within the CARA application; it can only be used as a “pop-out” new window.
- The profile tab of the ‘My settings’ screen is not displayed in CARA integrations as the data displayed on this screen is not relevant.

4.2 Known Limitations

This section lists any known limitations of using PleaseReview via the CARA UI. Where appropriate, details of suitable workarounds are shown as well.

- Unlike in the native PleaseReview interface, participants with “Viewer” role will have access to the “View Report” screen via the custom action.
- When items within the PleaseReview inbox items are updated within PleaseReview, these aren’t automatically reflected within the current page within CARA. For instance if a new review were created or had its status changed, in order for this to be reflected in the “My Reviews” SnapList the user would need to double click on it so that a refresh takes place.

The same thing may happen with the “Recycle bin” SnapList.

Should on occasion an error occurs due to the item having changed state, users should be trained to go close the error window and perform a refresh from within Cara.

- In order to be able to access the PleaseReview windows from within the CARA UI when using Internet Explorer, you may have to add the PleaseReview base site URL (e.g. <https://your-company.pleasereview.net>) as a “trusted site”.
- If a user exists as an author in one or more than workgroup, they will need to be assigned to the `cara_pleasereview_owner` role which will in turn give them access to the menu itemsto be able to create a ‘New Review’. Should they also exist as a reviewer only member of another second workgroup they will still be able to select the option to create a review in this second workgroup, however in doing so they will encounter a permissions error. In order to avoid this, users should be trained only select workgroups they have permission on.
- Authors can only create (checkout) reviews on documents they have version permission on.
- When transferring reviews, the new owner must have version permission on all the documents in the review, otherwise any subsequent check-ins will fail. As a result users should be trained to be aware of this.
- If a user manually checks in a document they currently have in review, it will not be possible for the system to automatically check the review document back into CARA from the review Closeout screen. Instead the user would need to manually save the document with review changes locally and then manually check it in as a new version.

- If a user is assigned to the `cara_pleasereview_owner` role, which will also give them access to the Admin functionality, they must also exist in PleaseReview as a user with Admin permissions.
- In the PleaseReview SnapList, the “New Review” button will not appear if the SnapList is empty (i.e. if the user is not a participant in any reviews). In this case, the user can only initiate a new review from the cabinets section of CARA.
- Wildcard searches using * aren’t supported through the CARA UI in the same way as within PleaseReview. Instead no wildcards are needed in accordance with standard CARA functionality.
- The PleaseReview SnapLists only work in detailed view.

5 Notices

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