Installing the New ProjectSolve^2 Plug-in (Non-WSP Users)

October 2021

The newest version of OpenText's *eRoom* product, the software engine on which WSP's ProjectSolve^2 (PS2) application is built on, was recently released and the WSP PS2 environment was upgraded to this new version in October of 2021.

One of the primary benefits of this new release is the inclusion of an updated version of the eRoom plug-in application that has been designed to work with today's modern internet browsers, like Edge and Chrome, using browser extensions. This file will need to be downloaded and installed on the machines of uses who which to utilize it.

Usage of this new plug-in will be required to enable the drag and drop functionality within PS2 for users who require the use of that feature and must be used in conjunction with the appropriate browser extension for the desired browser you wish to utilize.

Note: One of the enhancements related to the new version of eRoom that was installed is that users will no longer need to rely on the plug-in to use Rich Text Editing features within eRoom, limiting the number of people who will need to install the additional software.

Process Check List

The detailed steps laid out in this document are summarized here for quicker access and understanding:

Install the New Plug-in File

- ☐ Open a Browser
- ☐ Go to https://eroom1-qa.opentext.com/eRoomSetup/ClientSetup.exe
- ☐ The plug-in file will download automatically
- ☐ Exit out of the eRoom Monitor (if it's running)
- ☐ Close all open browser windows
- ☐ Right-click the "ClientSetup.exe" file you downloaded above
- ☐ Select "Run as Administrator"
- ☐ Complete the installation process

Accessing the New PS2 Environment

- ☐ Open the browser
- ☐ Access PS2 via an existing link
- ☐ Select with or without plug in (if prompted)

Add the OpenText Client Manager Extension to your browser

- ☐ Click "Install" when prompted
- ☐ Select "Add to Chrome" from the Web Store
- ☐ Confirm the add-on activation

☐   Close the browser on completion

Test the Plug-in

☐   Restart the browser
☐   Re-access PS2 via the preferred link
☐   Access the project site
      a.   If you receive an error, please contact Support@projectsolve.com for additional assistance
☐   If you receive a "First Time Using Plug-in" message, select "Yes"
☐   In the site, mouse over the logo in the upper left-hand corner and look for a message.
      a.   If it says "with plug-in" you are ready to use PS2 ← STOP HERE
      b.   If it states "without plug-in", go to "Activating the Installed Plug-in" below

Activating the Installed Plug-in

☐   Access the "My eRooms" page
☐   Open the "Preferences and Support Information" menu
☐   Select "Manage My Plug-in"
☐   Select "eRoom plug-in software"
☐   Click "OK"
☐   Go to "Test the Plug-in" above

DETAILED STEPS

Install the New Plug-in File

The first thing that users who wish to use the new version of the eRoom plug-in need to do is to download and install the appropriate executable file on their computer.[1]

STEP 01: Download the Plug-in File

To download the new plug-in executable file, open a fresh version of the web browser you are using and go to the following URL:

https://eroom1-qa.opentext.com/eRoomSetup/ClientSetup.exe

The eRoom Plug-in's executable file (*ClientSetup.exe*) will download automatically and be saved to the "Downloads" folder on your local machine.

STEP 02: Shut Off the eRoom Monitor (if Running)

If you were an existing ProjectSolve[2] users prior to the upgrade, you may already be running the "eRoom Monitor" application on your machine, if so, we need to turn that off temporarily. If this application is running on your machine, you should see the "eRoom Monitor" icon (a blue and black backwards "%") in your system tray. Right-click on this icon and select "exit" to close the monitor, as shown in Figure 1, before continuing.

---

[1]   Not all users will be able to install new software so if you run through the steps laid out in this document and are unable to install the application, you will need to contact your local IT support team for assistance.
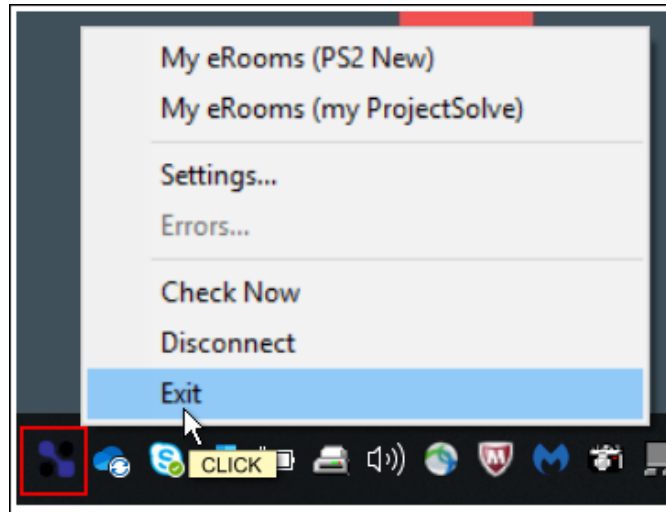
Figure 1. Exiting the eRoom Monitor

You will then be asked to confirm this selection, click "Yes" to continue (Figure 2).
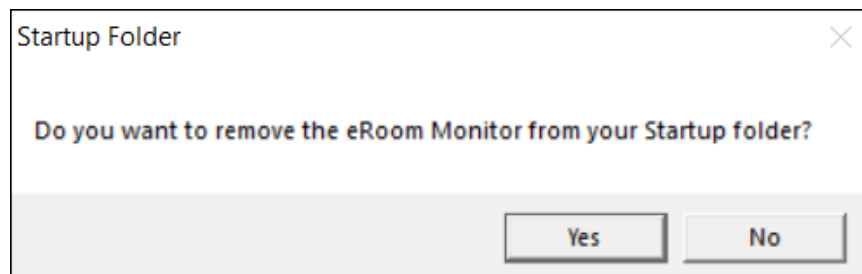

Figure 2. Confirming the "Exit" Request

STEP 03: Run the eRoom Plug-in Executable

You should now be able to run the executable that downloaded to your computer (most likely to your "Downloads" folder) to install the updated plug-in file.

Right-click on the "ClientSetup.exe" executable file you saved above and select "Run as Administrator" (Figure 3) in order to run the plug-in installation software on your machine.
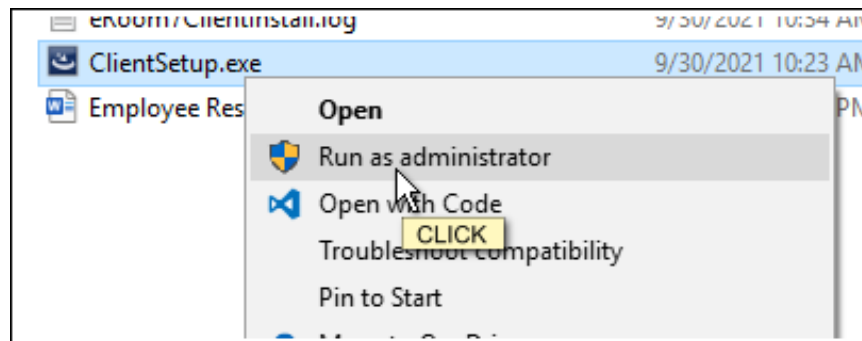
Figure 3. "Run as Administrator" Option

Note: If you are uncomfortable performing this action, or if your machine down not allow it, you can request that your local IT support person perform this task for you.

You should see an "InstallShield Wizard" screen on your computer desktop, similar to Figure 4:
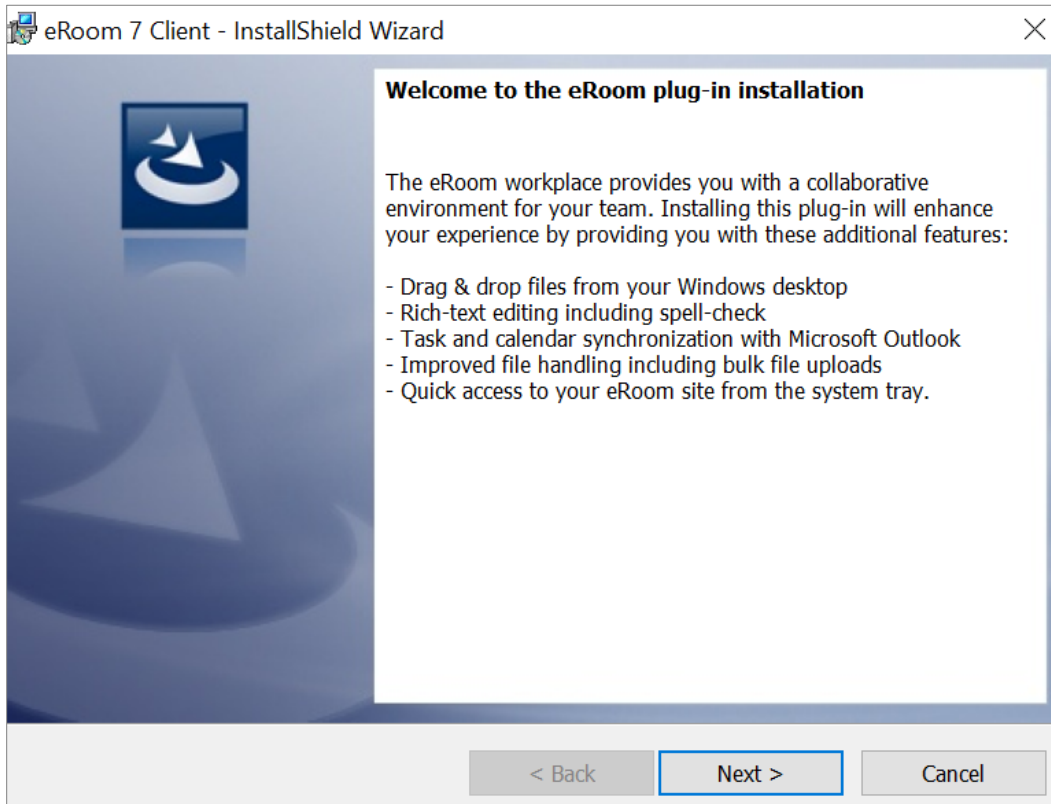

Figure 4. The "InstallShield" Screen

Continue to click the "Next" button until you get to the "Ready to Install the Program" screen shown in Figure 5:
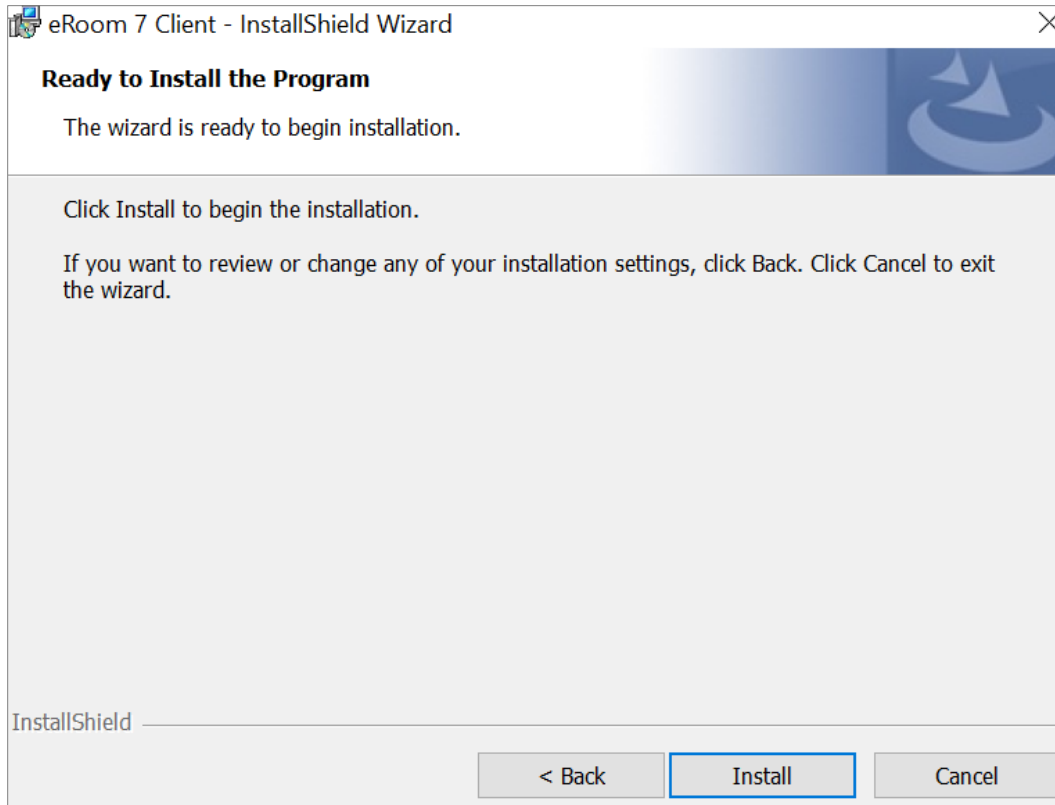
Figure 5. The "Ready to Install" Screen

From this screen, click the "Install" button to initiate the installation process.

Once the install has completed successfully, you will receive the following message (Figure 6) from the system, you can click "OK" to move past it at this time:
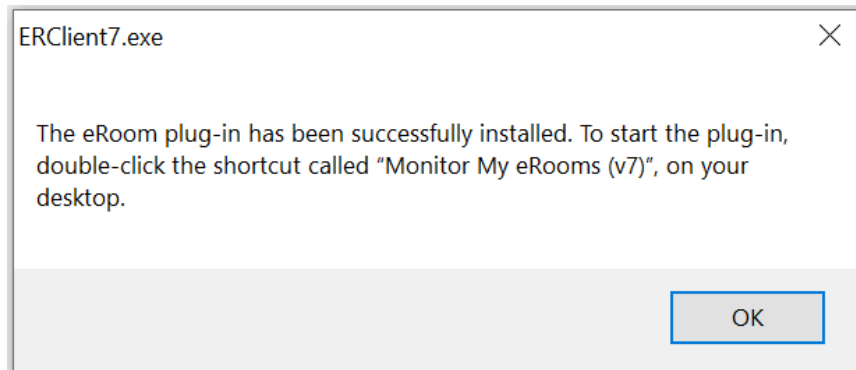

Figure 6. The "ERClient7" Message

Note: You do NOT need to follow the instructions provided in Figure 6 in order to continue.

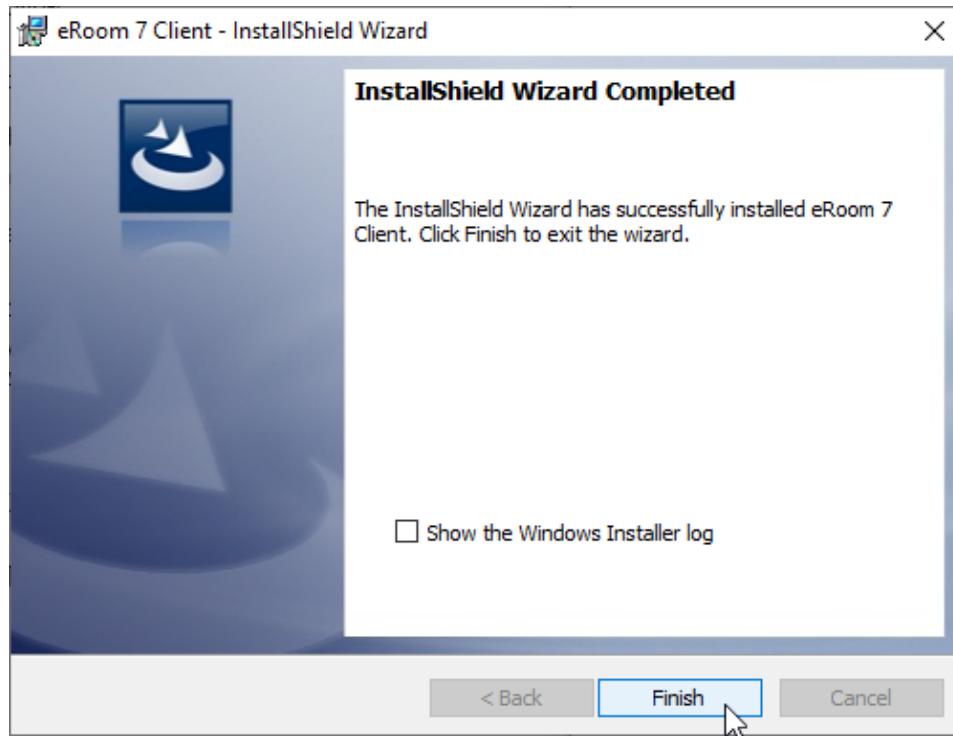The system will now display a message telling you that you have successfully installed the plug-in:

Figure 7. The "Installation Success" Screen

STEP 04: Restart the Browser

Once the plug-in installation has completed you will need to close all open browser sessions and then open a fresh version of the browser to make the changes take effect.

Accessing the New Environment

STEP 05: Access a PS2 site

Open the desired web browser you prefer to work with and access a PS2 project site via an existing link you have been provided previously. *

* Note: Because we are applying the eRoom modifications to the existing WSP PS2 environment, all existing links that you currently have should continue to work but will now be accessible via the modern browsers instead of just using Microsoft's Internet Explorer when needing the plug-in.

STEP 06: Select your preferred working method (with plug-in or without plug-in)

The first time you enter the upgraded ProjectSolve[2] environment, you should be prompted by the system to identify whether you want to proceed using the eRoom plug-in software or not via the Software Options menu shown in Figure 8.

Figure 8. The eRoom Software Options Screen

If you don't feel that you need to use the plug-in for working in eRoom/PS2 (and not everyone does), select "Just the web browser" and you are done and can stop here.

If you do wish to utilize the plug-in and its associated features, select the "eRoom plug-in software" option to identify this selection. You will want to select the plug-in option if you need to use features such as the drag-and-drop function and automatic file edit/save handling.

Note: Unlike the old eRoom plug-in, the new plug-in requires two objects working in tandem - the plug-in executable file provided by WSP IT and the appropriate associated browser extension file for the selected browser which you will select below.

Adding the Browser Extension

For most PS2 users, simply adding the new browser extension for your selected browser (e.g., Edge, Chrome or Firefox) should be sufficient to finish the update process.

STEP 07: Click "Install" when prompted by the system

If you selected the "eRoom plug-in software" option above, and you do not already have the browser extension installed, you should see a yellow bar appear at the top of the screen, similar to Figure 9:
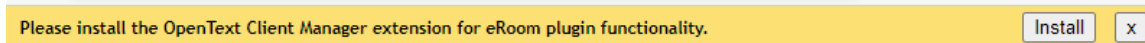

Figure 9. Browser Extension Install Bar

Clicking the "Install" button will take you to the appropriate browser web store where you can add the extension to your browser.[2]

Note: If you are using the Microsoft Edge browser, please note that you will need to allow Chrome extensions for the new extension to work, as shown in Figure 10.

Figure 10. MS Edge "Allow Chrome Extensions"

---

[2] If you need to install the extension and do not see the "Install" button, you can do so by going to: https://chrome.google.com/webstore/detail/opentext-documentum-clien/kapenncbbdmooanjhhaokalmincfphkf

![WSP logo]

STEP 08: Select "Add to Chrome" from the Web Store

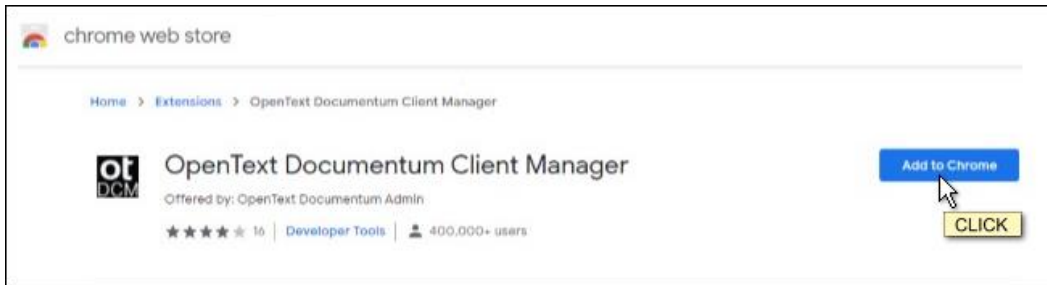The web store page you are taken to should look similar to Figure 11:

Figure 11. The Web Store Page

Click the "Add to Chrome" button to the right of the **OpenText Documentum Client Manager** text to add the extension to your browser. The system will now load the extension and provide you a message saying the process completed successfully.

Note: For most PS2 users with the plug-in executable installed, this should be all that needs to occur in order to use the new eRoom plug-in.

STEP 09: Close your browser session

Once you see the confirmation message saying you have successfully installed the extension, you must close the current browser session before you can continue.

Test to See if the New Plug-in Works

STEP 10: Restart your browser

In order to see if the updated plug-in and new extension installation was successful, we need to first refresh the browser session.

Restart the browser and then re-access the ProjectSolve[2]/eRoom link you accessed earlier.

Note: If you receive an error when trying to access the PS2 site, similar to Figure 12, please proceed contact the ProjectSolve Support Team at support@projectsolve.com.
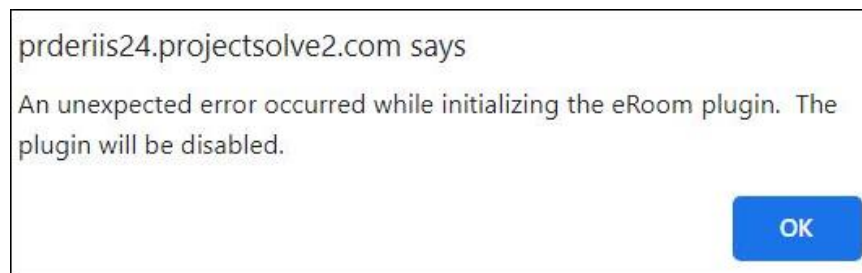

Figure 12. The eRoom Plug-In Setup Screen

If you do not receive an error, and this is the first time you've initiated the new plug-in, you may get the following notice from the system:
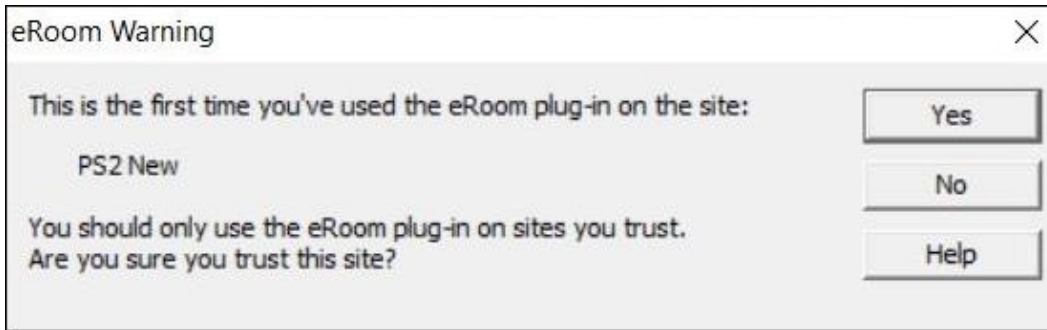
Figure 13. First Time Usage Message

Click "Yes" to continue.

STEP 11: Test the Plug-In

Once you have re-connected to the PS2 site you were trying to access earlier, you can move your mouse to the top of the screen (upper left-hand corner) and a box should appear telling you that you are viewing either "with" or "without" plug-in, similar to :
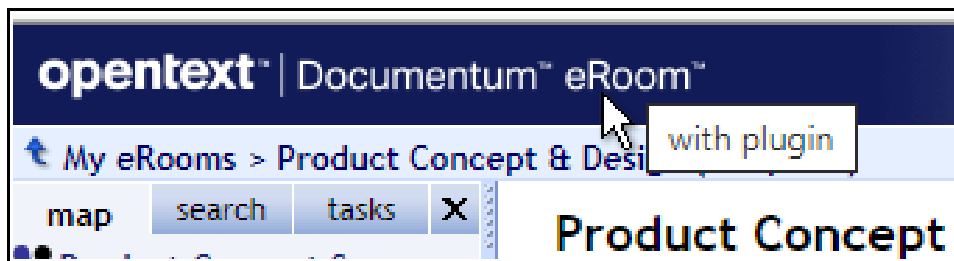

Figure 14. The "With Plug-in" Message

If the message you get states "with plug-in" (like Figure 14), you are now ready to use the plug-in and can stop here.

If the message you get states "without plug-in", please move to the next step.

STEP 13: Activate the Plug-In

If you have taken all of the steps above and you get a message saying "without plugin", you can try to activate the plug-in by hand.

Access the My eRooms page, open the "Preferences and Support Information" menu and select the "Manage my Plug-in" option provided:
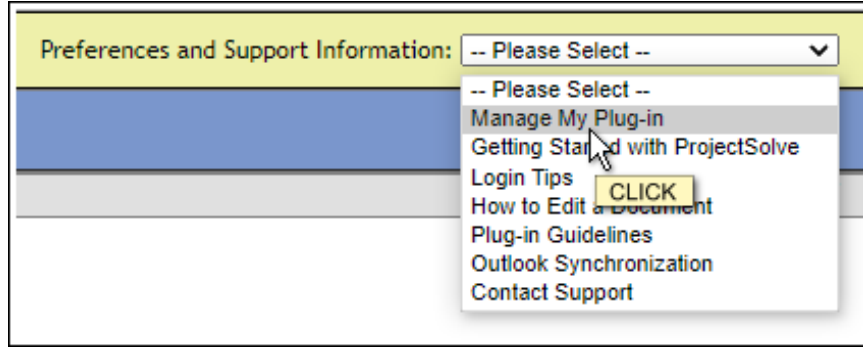
Figure 15. The "Manage My Plug-in" Option

You will then need to select the "eRoom plug-in software" option from the screen that appears and click "OK" to continue (see Figure 16).
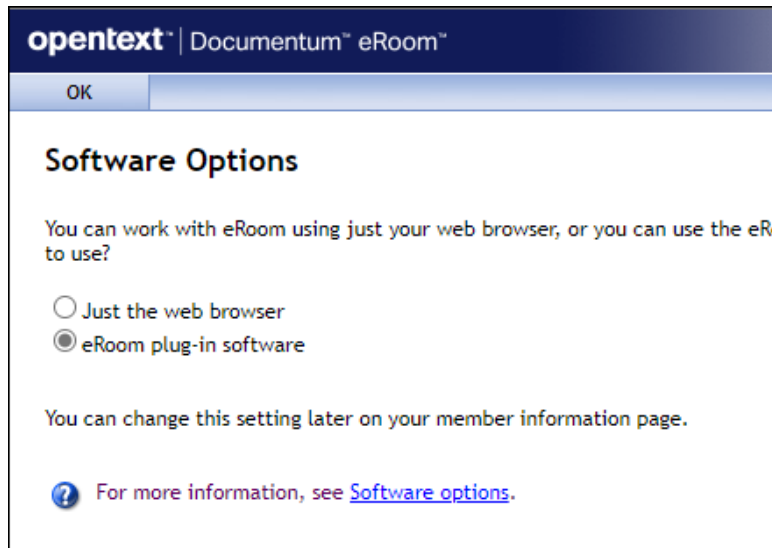

Figure 16. The "Software Options" Screen

Go back to the PS2 site and test again to see if the plug-in is now active.

Getting Additional Assistance

If after going through these steps you still need assistance getting the plug-in to work, please reach out to us at:

Support@ProjectSolve.com