Installing the New ProjectSolve^2 Plug-in (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. **In preparation for this upgrade, WSP IT has pushed out the newest version of the plug-in to all known WSP PS2 users in order to simplify the update process where possible.**

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:

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 (even for Edge browsers)
☐ 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, go to "Additional Setup Steps" below

   NOTE: If you have already gone to "Additional Setup Steps" once and are still having issues, 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

Additional Setup Steps

☐   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
☐   Go to "Test the Plug-in" above

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

Accessing the New Environment

STEP 01: 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 02: 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 1.

Figure 1. 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 existing WSP PS2 users, simply adding the new browser extension for your selected browser (e.g., Edge, Chrome or Firefox) should be sufficient to update the executable already installed on your machine by Corp IT.

STEP 03: 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 2:
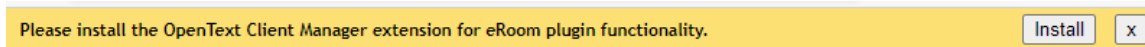

Figure 2. Browser Extension Install Bar

Clicking the "Install" button will take you to the appropriate browser web store where you can add the extension to your browser.[1]

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 3.

Figure 3. MS Edge "Allow Chrome Extensions"

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[1]   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

STEP 04: Select "Add to Chrome" from the Web Store

The web store page you are taken to should look similar to Figure 4:
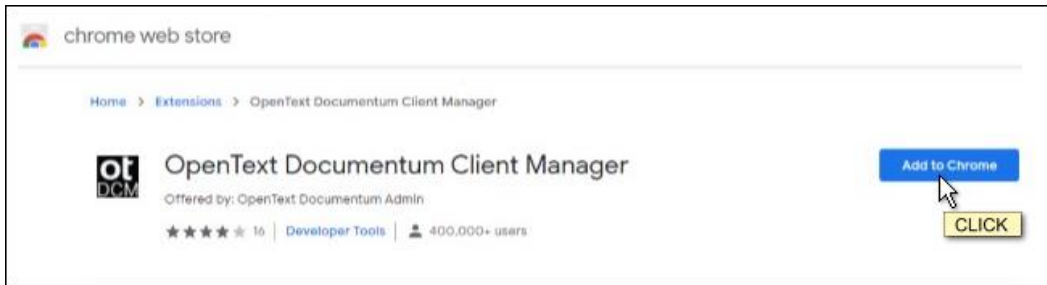

Figure 4. The Web Store Page

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 WSP PS2 users who had the plug-in installed on their system by Corporate IT, this should be all that needs to occur in order to use the new eRoom plug-in.

STEP 05: 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 06: 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 5, please proceed to the "*Additional Set Up Steps (If Needed)*" section below.
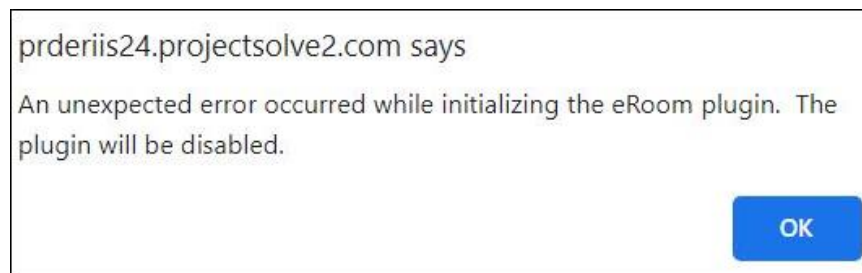

Figure 5. The eRoom Plug-In Setup Screen

If you do not receive an error, and this is the first time you've initiated the plug-in, you may get the following notice from the system:
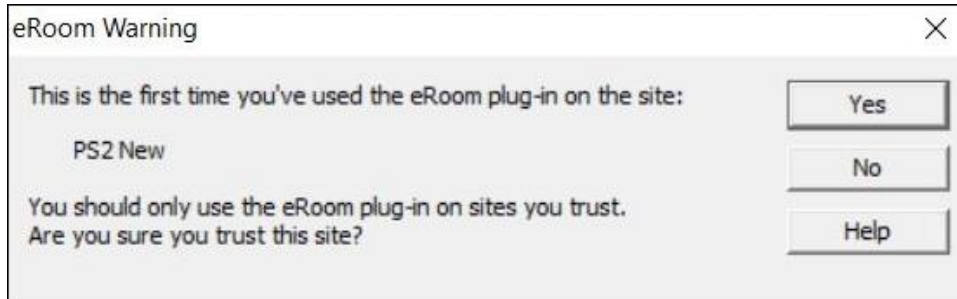
Figure 6. First Time Usage Message

Click "Yes" to continue with using the plug-in.

STEP 07: 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 :
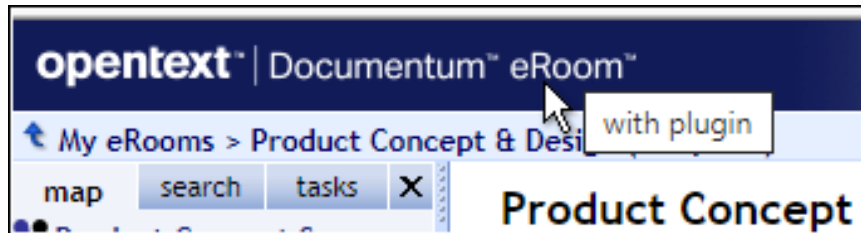

Figure 7. The "With Plug-in" Message

If the message you get states "with plug-in" (like Figure 7), you are now ready to use the plug-in.

Additional Set Up Steps (If Needed)

For a small percentage of our WSP users, additional steps will be needed to get the new version of the eRoom plug-in installed and operating as needed. If you have done all the steps above and still cannot get the plug-in to work, or you get an error like Figure 5 above when trying, please perform the following steps.

STEP 08: Download the Plug-in File

Although Corporate IT should have already downloaded the latest version of the eRoom plug-in to all existing WSP PS2 users, there is always the chance that someone was missed or the download didn't complete successfully. To download the file yourself, 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.

Note: For WSP staff, if you try and run the file at this point in the process you will get a screen requesting the Administrator ID and password for your computer, we will deal with that below.

STEP 09: Shut Off the eRoom Monitor (if Running)

The eRoom software includes a desktop application called the "eRoom Monitor" that may be installed for existing users of the product. 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 8, before continuing.
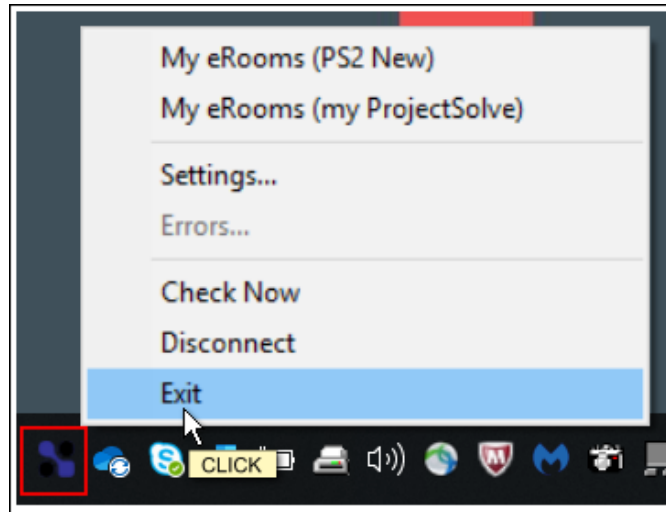

Figure 8. Exiting the eRoom Monitor

You will then be asked to confirm this selection, click "Yes" to continue (Figure 9).
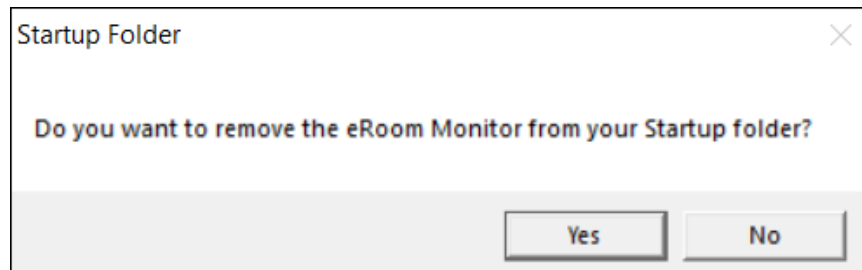
Figure 9. Confirming the "Exit" Request

STEP 10: Run the eRoom Plug-in Executable

You can now 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 previously and select "Run as Administrator" (Figure 10) in order to run the plug-in installation software on your machine.
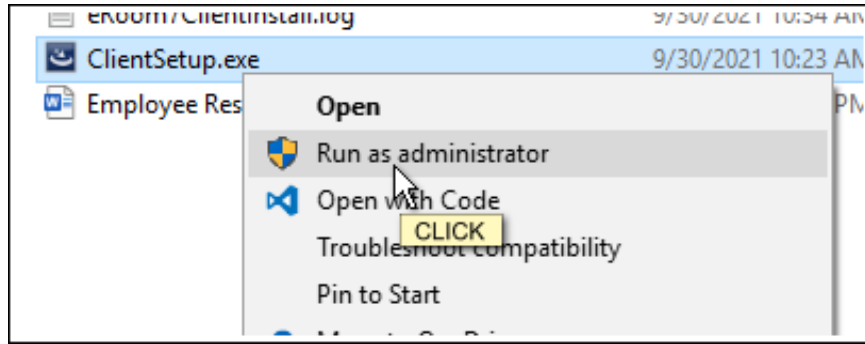
Figure 10. "Run as Administrator" Option

Note: If you are uncomfortable performing this action yourself you can request that your local IT support person perform this task for you.

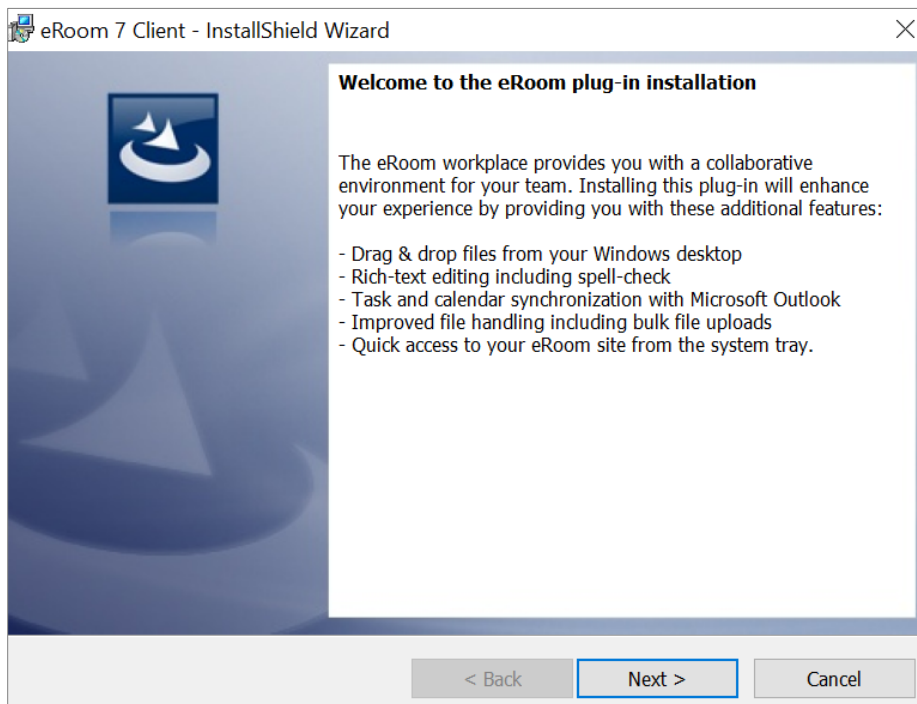You should see an "InstallShield Wizard" screen on your computer desktop, similar to Figure 11:

Figure 11. The "InstallShield" Screen

Continue to click the "Next" button until you get to the "Ready to Install the Program" screen shown in Figure 12:
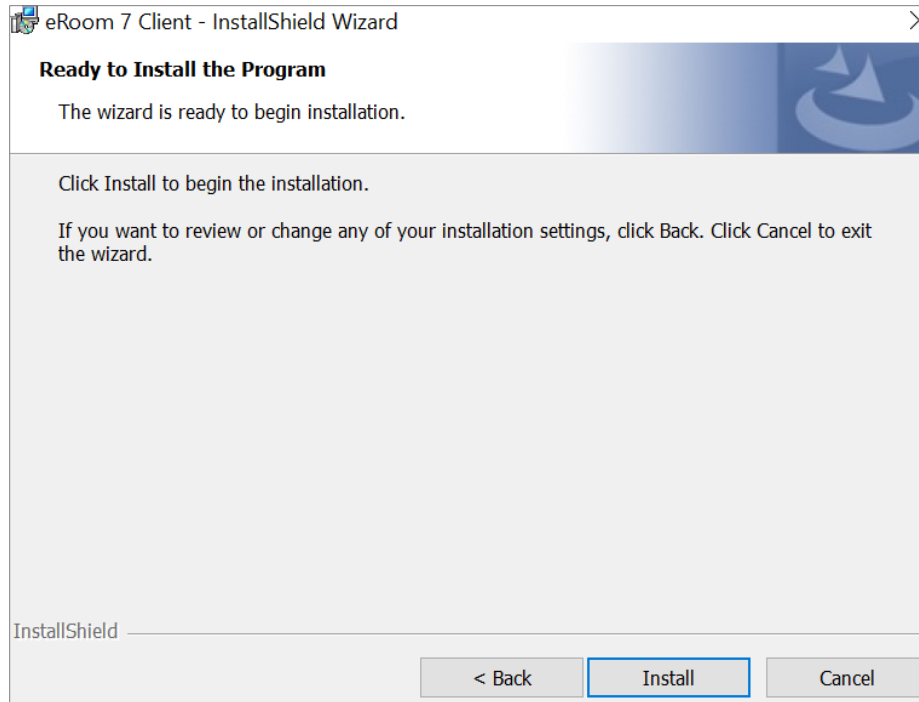
Figure 12. The "Ready to Install" Screen

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 13) from the system, you can click "OK" to move past it at this time:
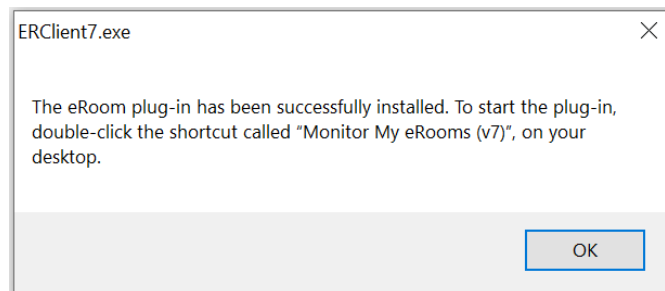

Figure 13. The "ERClient7" Message

Note: You do NOT need to follow the instructions provided in Figure 13 in order to continue.

The system will now display a message telling you that you have successfully installed the plug-in:
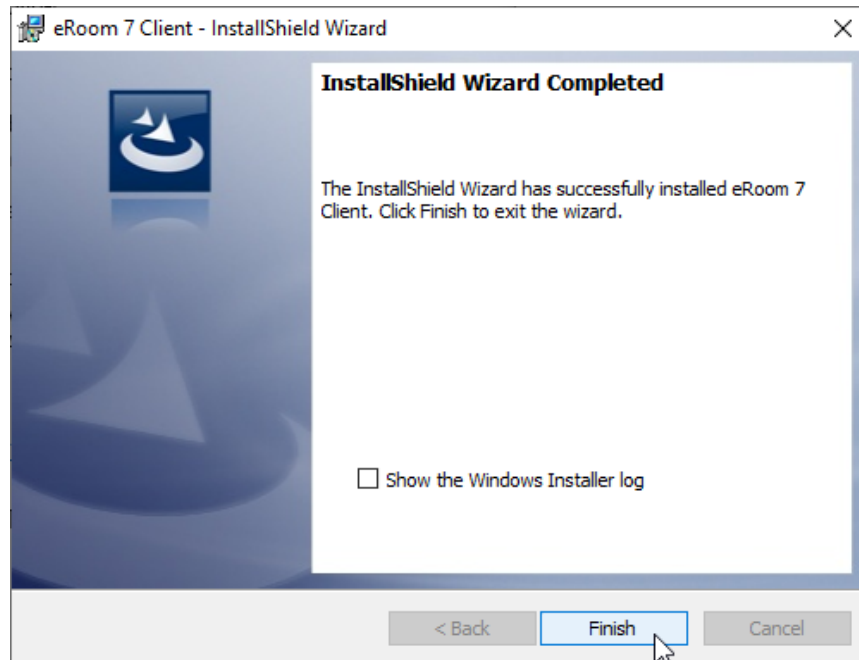
Figure 14. The "Installation Success" Screen

STEP 11: 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.

STEP 12: Access the PS2 Site and Test the Plug-in

After restarting your browser session, access the desired ProjectSolve[2]/eRoom project site.

Move the mouse to the upper left-hand corner and see what message pops up (like Figure 7 above.)

If you get a message saying "with plugin" you are done and ready to use the system.

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:
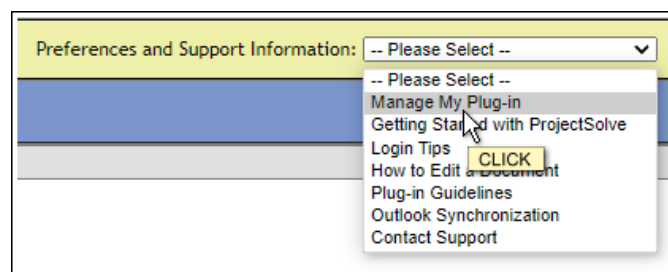

Figure 15. The "Manage My Plug-in" Option

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).
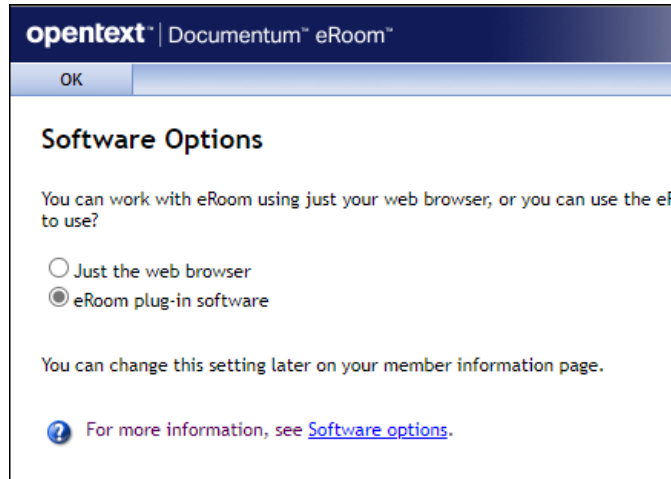

Figure 16. The "Software Options" Screen

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