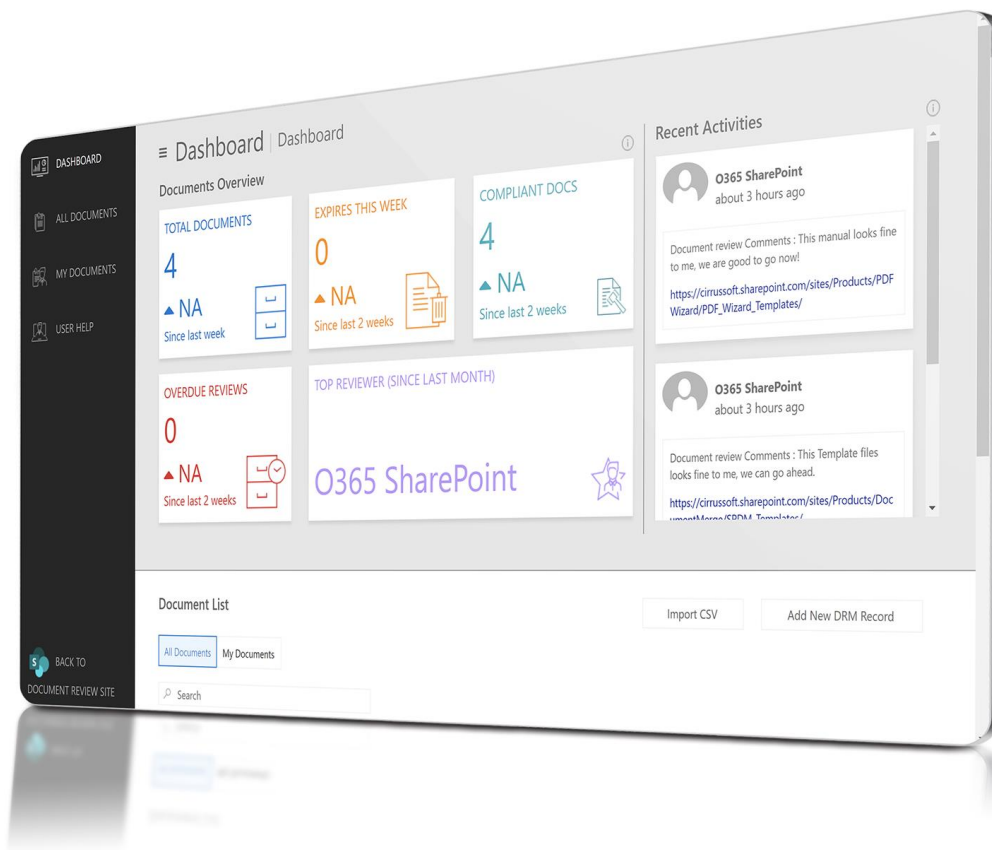


INSTALLATION AND CONFIGURATION MANUAL



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Version History Change Record

Date	Author	Version	Change reference
2020, May	Document Review Manager	1.0.0.0	Initial Release for SharePoint.

Current Version for SharePoint Online

Name	Version Approved	Compatibility	Date
Calendar Hub	Document Review Manager	SharePoint Online / Microsoft 365.	2020, April

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Introduction

Document Review Manager for SharePoint provides a simple, clean and user-friendly interface to review your documents. The **Document Review Manager** is easy-to-use and is designed for SharePoint Online (Microsoft 365). Enabled through your existing SharePoint environment, the Document Review Manager makes maximum use of SharePoint features. Users can efficiently track their documents validity and review them.

The Document Review Manager Dashboard gives you a birds eye view to the overall situation and a glance to activities happening.

Document Review Manager provides you a convenient way to manage review of your documents.

Document Review Manager Uses:

Do you use SharePoint, OneDrive, any other application or combination of them to manage your documents and you have document review mechanism in place or you want it to incorporate into your document management system?

With this add-in you can quickly get started with the same. It will also help you with all analysis and required information at one place irrespective of where your documents are.

Also supports document records import via CSV to get started within shortest time-span possible.

Document Review Manager Benefits and

Features

- Add document records irrespective of where your document is stored. The one-stop solution for all your documents regardless of where they reside... SharePoint Sites, OneDrive, Box, File share or any file location
- Set validity date and easy interface for review
- Hyperlinks to actual document
- Dashboard displaying following KPI and changes;
 - Total number of documents
 - Expiring documents this week
 - Compliant documents
 - Number of Overdue documents as per the review date

- Top reviewer of past month
- Recent activity which displays what all is happening in the application
- Free text search on records to quickly find out relevant document record
- Intuitive review feature
- Inherits SharePoint site permissions

Document Review Manager Installation

Types of License

Document Review Manager is made available from the Microsoft AppSource (search Document Review Manager).

Below is the list of **Document Review Manager** License Types;

Trial: The trial license can be used for unlimited users. It will expire after 15 days.

Site license: A site license activates **Document Review Manager** functionality to all users and the SharePoint site to which it is applied.

Site Collection: A site collection license activates **Document Review Manager** functionality to all users and any sites/subsites within a site collection.

Tenant: A Tenant license activates **Document Review Manager** functionality to all users and any sites/subsites within a Tenant.

Installing Document Review Manager for SharePoint

To add an app from the SharePoint Store

1. Verify that the user account that is performing this procedure is a member of the site owners group.
2. Click the **Settings** icon, and click **Site Contents**, and then on the Site Contents page, click **Add an App**.
3. Click **SharePoint Store**.
4. Browse the SharePoint Store for “**Document Review Manager**”.
5. Click the **Document Review Manager** App.

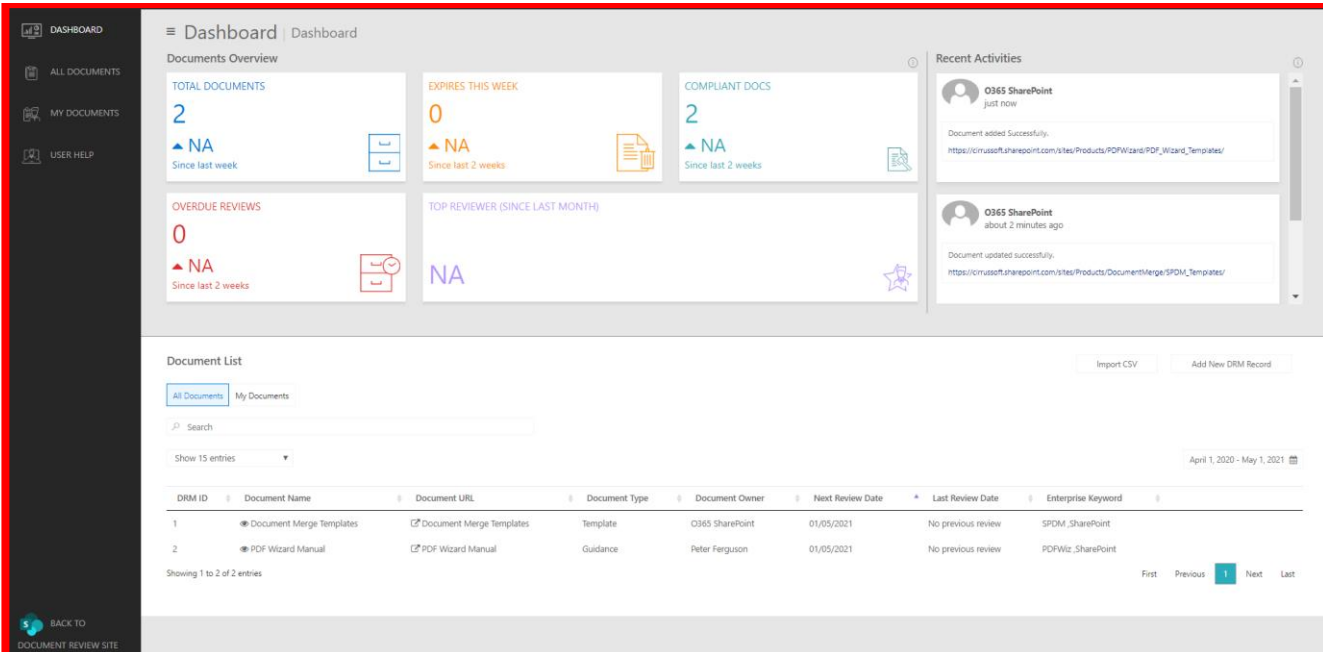
6. Click details, and then click **Trial / Buy It**.
7. Follow the steps to log in and purchase the App, if required.
8. In the Grant Permission to an App dialog box, if you trust the App, click **Allow Access**.
9. The **Document Review Manager** App is now added and appears in the Apps section of your Site Contents list.

Using Document Review Manager

Once **Document Review Manager** is installed, you can click on the Document Review Manager app in the Site Contents. This will navigate you to the Document Review Manager Dashboard page.

Dashboard

When Document Review Manager is opened it will navigate to the dashboard page as shown below.



- Dashboard has several KPI datapoints as below;
 - Total number of documents
 - Expiring documents this week
 - Compliant documents
 - Overdue reviews
 - Top reviewer of a month
- Dashboard also shows Recent activity which show what all is happening in the application.
- List of all documents which can be filtered further with date range, and other columns.
- Free text search on records to quickly find out relevant document record from All Documents and My Documents.

Add New DRM Record

There is a button available on the Document Review Manager dashboard called as **Add New DRM Record**. User can add a new record in a Document Review Manager application by clicking on this button.

The screenshot shows the 'Add New DRM Record' form in the Document Review Manager dashboard. The dashboard has a dark sidebar with navigation options: DASHBOARD, ALL DOCUMENTS, and MY DOCUMENTS. The main content area is titled 'Dashboard | Add New DRM Record'. The form fields are as follows:

- Document Name ***: Text input field containing 'Product Ideas'.
- Document Path ***: Text input field containing 'https://cirrussoft.sharepoint.com/sites/Products/'.
- Document Type ***: Dropdown menu with 'Guidance' selected.
- Document Author ***: Text input field containing 'O365 SharePoint x' and a placeholder 'Select or enter user name'.
- Document Tag ***: Text input field containing 'SharePoint; Bot; Graph;' and a link icon.

At the bottom of the form are 'Save' and 'Cancel' buttons. The sidebar also features a 'BACK TO DOCUMENT REVIEW SITE' link with a SharePoint logo.

- Document Name
 - Name of a document
- Document Path
 - Document Path can be anything irrespective of where your document is and hence it can be URL from same site document, other sites, on OneDrive, Box, File share or anywhere else practically.
- Document Type

- Document type defines the type of the document which you want to submit as a record in Document Review Manager application.
- There document types are fetched from the SharePoint list so can be modified to add other document types as required
- Document Author
 - Document Author is the field to specify the owner of a document which you are adding as a record in a Document Review Manager application.
 - You can select any user which are available in your azure active directory or SharePoint site.
- Document Tag
 - Document tag is used to tag a document to make it easily searchable and manageable for the customer user experience point of view.

Document Review Manager Grids







Once a document record has been added into the Document Review Manager application it will be displayed as a record in a grid view on the dashboard as shown below.

Document List Import CSV Add New DRM Record

All Documents My Documents

🔍 Search


Show 15 ent ▾ April 1, 2020 - May 1, 2021 📅



DRM ID	Document Name	Document URL	Document Type	Document Owner	Next Review Date	Last Review Date	Enterprise Keyword
1	 Document Merge Templates	 Document Merge Templates	Template	O365 SharePoint	01/05/2021	No previous review	SPDM ,SharePoint
2	 PDF Wizard Manual	 PDF Wizard Manual	Guidance	Peter Ferguson	01/05/2021	No previous review	PDFWiz ,SharePoint
3	 Product Ideas	 Product Ideas	Guidance	O365 SharePoint	01/05/2021	No previous review	SharePoint ,Bot ,Graph

Showing 1 to 3 of 3 entries First Previous **1** Next Last

All Documents and My Documents

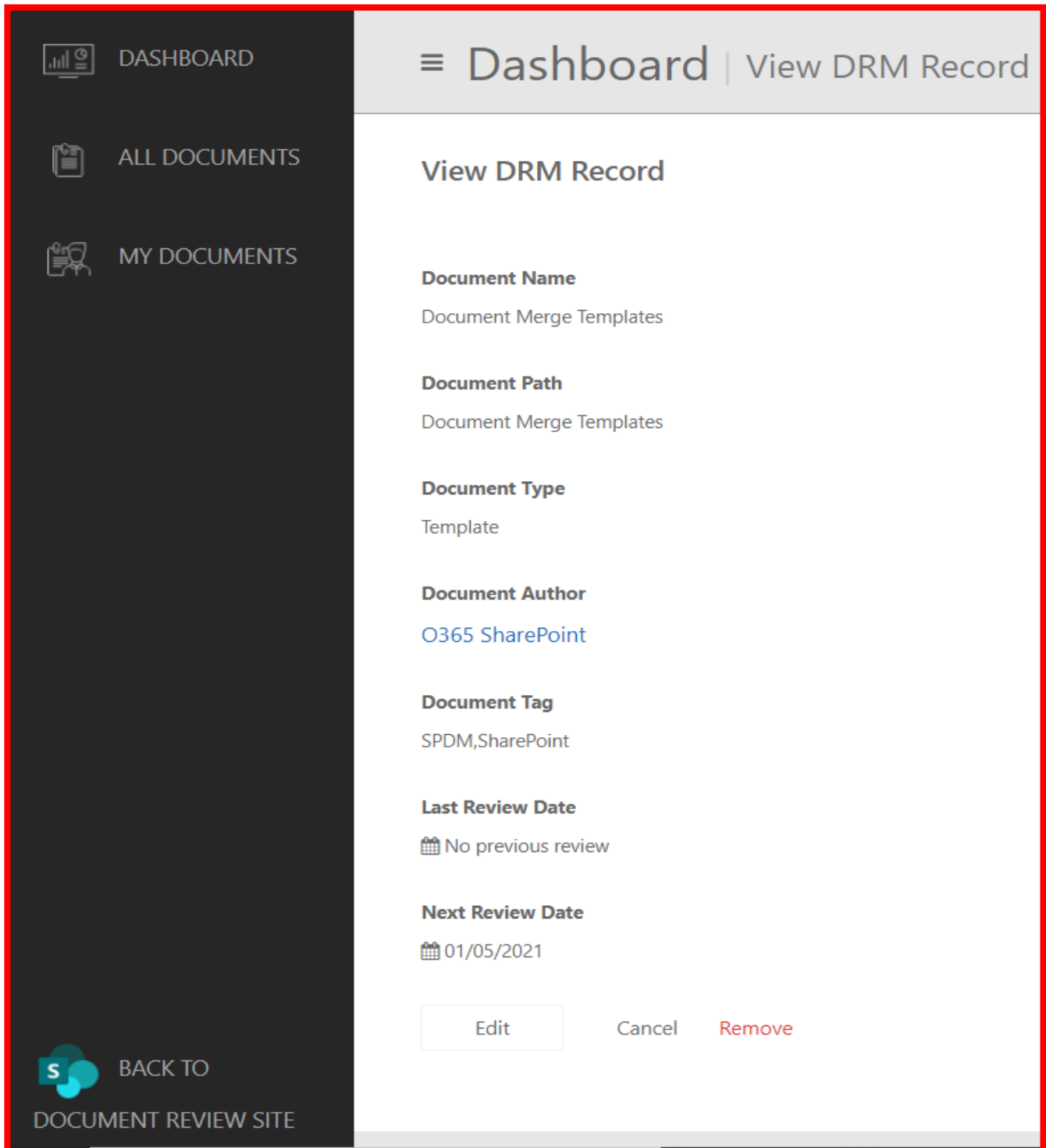
A document record added in a Document Review Manager application will be displayed as a record in All Documents grid view and in My Documents grid view if you are author of the document.

- This grid view is having several functionalities like free-text search, Date filter on the Next review date column, and no of entries to display per page and sorting.
- You can also view the document record entry by clicking on the  icon.



- Once you hover the row in a grid view, you can review the document by clicking on the [Review](#) in the grid. Also, you can view the review history for that document by clicking on the  icon.
- You can visit the View form for the record by clicking on the  icon.

View DRM Record

When you click on the  icon a View DRM Record page will be opened as given below.



The screenshot shows the 'View DRM Record' page. On the left is a dark sidebar with navigation options: DASHBOARD, ALL DOCUMENTS, and MY DOCUMENTS. At the bottom of the sidebar is a 'BACK TO DOCUMENT REVIEW SITE' button. The main content area has a header 'Dashboard | View DRM Record' and a title 'View DRM Record'. Below the title are several fields:

- Document Name:** Document Merge Templates
- Document Path:** Document Merge Templates
- Document Type:** Template
- Document Author:** [O365 SharePoint](#)
- Document Tag:** SPDM,SharePoint
- Last Review Date:**  No previous review
- Next Review Date:**  01/05/2021

At the bottom of the record are three buttons: 'Edit', 'Cancel', and 'Remove'.

- You can view both Edit and Remove button if you have appropriate permission if editing of removing item in a SharePoint site.

Edit DRM Record

When you click on Edit button in the View DRM Record page it will open a page as given below.

DASHBOARD | Edit DRM Record

Edit DRM Record

Document Name *
Document Merge Templates

Document Path *
https://cirrussoft.sharepoint.com/sites/Products/DocumentMerge/SPDM_Templat

Document Type *
Template

Document Author *
O365 SharePoint x Select or enter user name

Document Tag *
SPDM; SharePoint;

Save Cancel

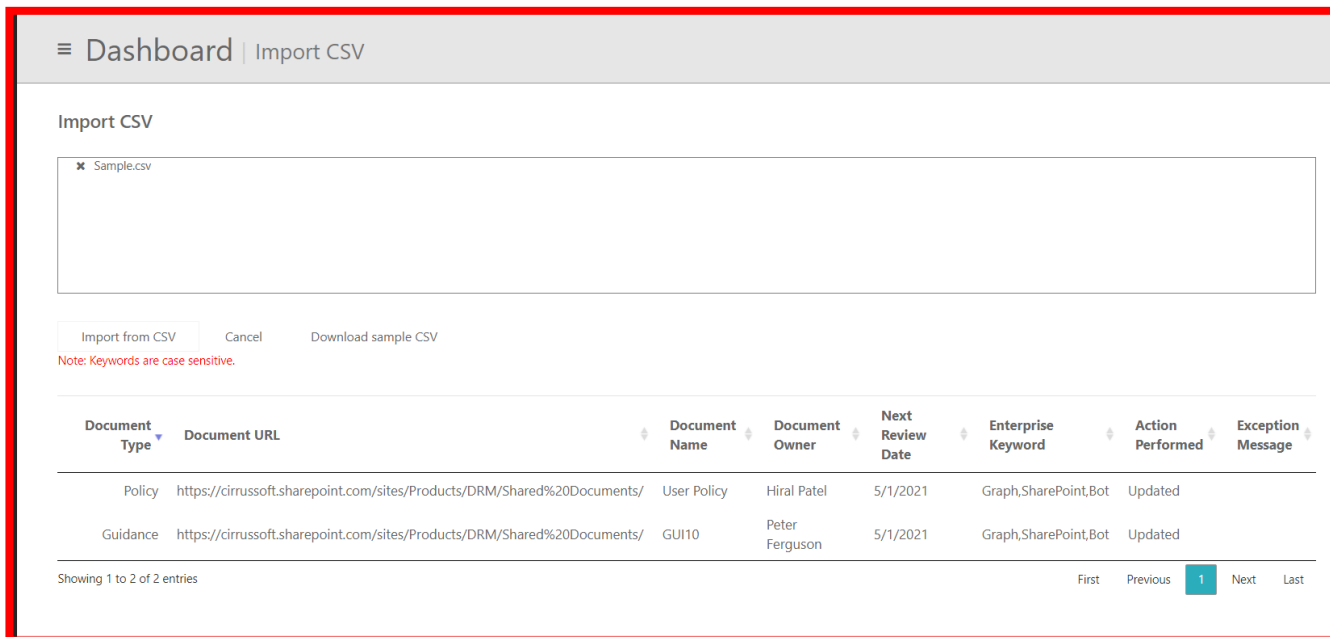
BACK TO
DOCUMENT REVIEW SITE

- You can Edit the DRM record and then click on Save button to reflect those changes in a Document Review Manager application.
- Again, if you do not have permission to edit an item in a SharePoint you are not able to view this page or edit an item.

Import CSV

There is one button available on the Document Review Manager dashboard called as Import CSV.

Clicking this button will open a page as shown below.



Dashboard | Import CSV

Import CSV

✕ Sample.csv

Import from CSV Cancel Download sample CSV

Note: Keywords are case sensitive.

Document Type	Document URL	Document Name	Document Owner	Next Review Date	Enterprise Keyword	Action Performed	Exception Message
Policy	https://cirrussoft.sharepoint.com/sites/Products/DRM/Shared%20Documents/	User Policy	Hiral Patel	5/1/2021	Graph,SharePoint,Bot	Updated	
Guidance	https://cirrussoft.sharepoint.com/sites/Products/DRM/Shared%20Documents/	GUI10	Peter Ferguson	5/1/2021	Graph,SharePoint,Bot	Updated	

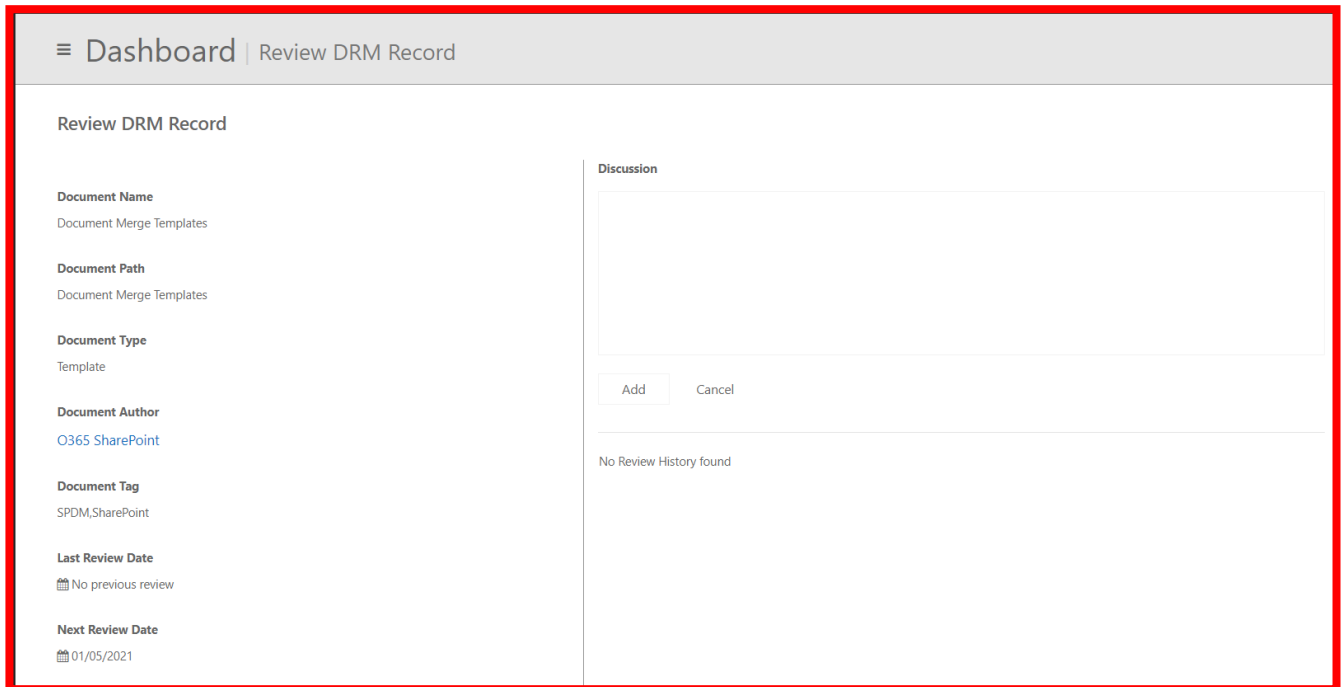
Showing 1 to 2 of 2 entries

First Previous 1 Next Last

- You can import multiple records in a Document Review Manager application by importing CSV file clicking on this button.
- You can download a sample CSV file to see how the csv file need to fill to make a successful import of records.
- As you can see in a screenshot above, a resultant grid is displayed after successful import of CSV records from the CSV file.
- Records which are imported successfully in Document Review Manager are displayed with appropriate Action Performed like Added, Updated.
- If due to some reason a record is not imported, it will be displayed with the highlighted color in a grid and the Action Performed status as failed and an Error Message.

Review DRM Record

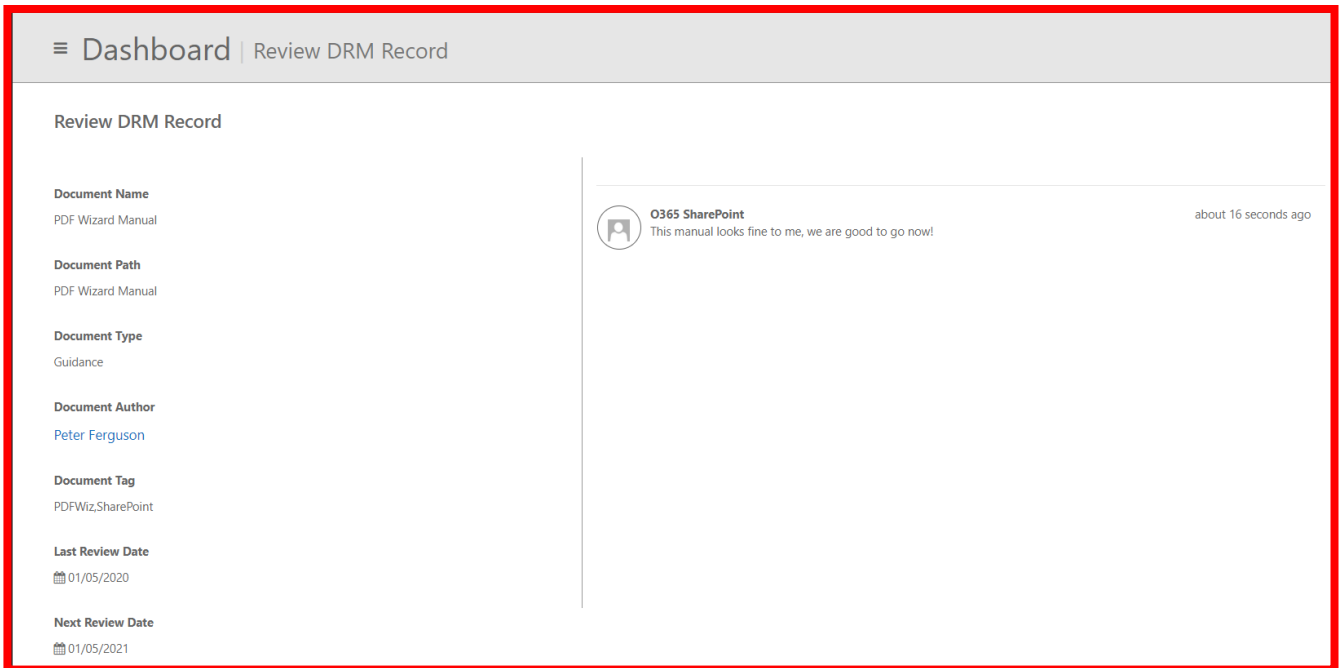
You can open a Review page by clicking on the [Review](#) in the grid. This will open a page as shown below.



- You can view the metadata for the record in the left-hand side of the page.
- After reviewing the document at the actual URL location, you can visit this page and review the document.
- You can add a discussion for the document record and hit Add.
- When you add a comment in the review page, it will update that record in the Document Review Manager application and extends its Next Review Date to the 1 year as the date of review.
- You can also view the comments which are added earlier for the same document record in past.

Review DRM History

You can open a Review page by clicking on the  in the grid. This will open a page as shown below.



The screenshot shows a web interface for reviewing a Document Review Record (DRM). The page title is "Dashboard | Review DRM Record". The main content area is titled "Review DRM Record" and is divided into two columns. The left column contains metadata for the record:

- Document Name:** PDF Wizard Manual
- Document Path:** PDF Wizard Manual
- Document Type:** Guidance
- Document Author:** Peter Ferguson
- Document Tag:** PDFWiz.SharePoint
- Last Review Date:** 01/05/2020
- Next Review Date:** 01/05/2021

The right column displays a comment from a user named "O365 SharePoint" (profile picture icon) made "about 16 seconds ago". The comment text is: "This manual looks fine to me, we are good to go now!".

- You can view the metadata for the record in the left-hand side of the page.
- You can view the comments which are added earlier for the same document record in past by users.

Document Review Manager Support

Thank you for choosing **Document Review Manager for SharePoint**.

If you require any further assistance, please visit our online Support Centre or Contact Us.

<http://cirrusoft.support>

INSTALLATION AND CONFIGURATION MANUAL

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