

PDF inFusion eReview 4.5

Administrator Documentation



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ITM Products LLC.
12530 Parklawn Dr.
Suite 250
Rockville, MD 20852
U.S.A.
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PDF inFusion™ eReview 4.5

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Chapter 1: PDF inFusion eReview Administration

1-1 Overview

This chapter covers a general overview of PDF inFusion eReview system requirements and installation procedures. This includes configuration of the domino server, creation of the eReview database from the PDF inFusion Review Template and database specific security settings for the proper functioning of the eReview database. Section listings:

- 1-1 Overview
- 1-2 System Requirements
- 1-3 The Database and Template
- 1-4 Setting the Review Options

PDF inFusion eReview has two components- a server component and a client component. This document explains the installation and configuration of the server component. To learn about the client component, please see the client documentation.

1-2 Server System Requirements

PDF inFusion eReview requires a minimum of Lotus Domino 4.6 server for access. ITM recommends using the Lotus Domino R5 server.

Please note that installing PDF inFusion is a two-part process:

1. Set up and configure the eReview database on the Domino server. NOTE: PDF inFusion 4.5 ships with a Domino database (PDFinFusionReviewTemplate.ntf). PDFinFusionReviewTemplate.ntf runs on a Domino 5.x server, and supports browser access.
2. Install the PDF inFusion web plug-in for browser access. It is important to note that each reviewer will need to install the PDF inFusion web plug-in (PDFiweb.api) in the Acrobat (or Acrobat Reader) plugs-in directory.

Note: If you wish to integrate your licensed version of the Acrobat 5 install for a seamless PDF inFusion/Acrobat installation, please contact PDF inFusion Support for more information.

1-3 The Database and Template

To set up the eReview database, PDF inFusion provides a Lotus Notes template, called "PDF inFusion eReview Template." To create a database from a template, you will need to follow these steps:

1. Create a new database on your Domino web server using the PDFinFusionReviewtemplate.ntf. NOTE: Your domino server must be running the HTTP task, so that the database can be accessed via URL. You must also have the appropriate port open for web access (port 80 is the default web access port).
 - a. Make sure the PDF inFusion Review Template is in the Notes Data directory.
 - b. Go to File\Database\New.
 - c. Choose the server to put the database on and give it a Title and Filename.
 - d. In the templates section, choose PDF inFusion Review Template.
2. All design elements are signed by PDF inFusion Development. The design elements can stay signed by PDF inFusion Development or can be resigned with a different ID.
3. Give the signer of the design elements access to run unrestricted agents on the domino server.
4. To sign a database with a different ID:
 - a. Switch Notes ID to be the ID that you want to use to sign the database.
 - b. Open Notes Administrator.
 - c. Highlight the correct database.
 - d. Choose Sign Database.
5. Set up the access control list (ACL) for the database.
 - a. Give the server Manager Access in the ACL.
 - b. Reviewers must have at least "Author" access with the ability to create documents in the ACL. The signer of the agents must have at least "Editor" access.
 - c. For Web Access, add 'Anonymous' with "User Type: Unspecified" and "Access: No Access to the ACL." This will force users coming in via a web browser to authenticate and, thus, capture important session data such as the Username.
6. Agent setup: Open the agent in Designer. Ensure that all desired agents are enabled to run on the server. The default server is Any Server, but it is recommended for scheduled agents to specify the server.
 - a. Click on the Schedule button.
 - b. Choose which server you would like the agent to run on (i.e. the server where the database is located).

- c. Save Agent (Note: make sure the ID that the agents are saved with has been granted access to run "Unrestricted Agents" in the server document).

1-4 Execution Control List Settings (ECL)

Due to the enhanced Execution Control List Security settings in Lotus Notes 5.x and above, you must add a new entry to your Administration ECL settings.

The name of the new entry is: PDF inFusion Development/ITM Associates Inc

The required settings are:

Workstation Security:

- Access to file system
- Access to current database
- Access to environment variables
- Access to external code
- Ability to send mail
- Ability to read other databases
- Ability to modify other databases
- Access to Workstation Security ECL
- Access to external programs

Java applet Security:

- Access to Notes Java classes
- Printing
- Access to system properties
- Dialog and clipboard access
- Process-level access

JavaScript Security:

- Allow Read Data Access from:
 - Source window
 - Other window from same host
- Allow Write Data Access from:
 - Source window
 - Other window from same host
- Allow Open Access to:
 - URL on same host

Chapter 2: PDF inFusion Support

This chapter includes PDF inFusion support options and resources including the PDF inFusion web site and PDF inFusion support email address. Section listing:

2-1 Support

2-1 Support

While this documentation provides the information you need to understand and use PDF inFusion eReview, there may be times when additional information or assistance is needed.

- If PDF inFusion was purchased from a PDF inFusion Business Partner, please contact the business partner for technical support. Your administrator will have all the contact information that you need.
- Otherwise, send your questions directly to ITM Products via email to: pdfinfusionsupport@itmassociates.com.

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