

# **PDF inFusion eReview 5.5**

Administration Documentation



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## **PATENT PENDING**

A patent application for PDF inFusion was submitted to the US Patent and Trademark Office (USPTO) in 2000. The patent on this invention is pending final approval by the USPTO.

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# Chapter 1 Introduction

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## 1.1 Overview

PDF inFusion eReview includes a server component and a client component. This document explains the installation and configuration of both components.

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

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## 1.2 System Requirements

On the server:

- Domino 5.0.x or 6.x server running the HTTP server task

On the user's machine:

Windows:

- Windows 95, NT 4 Service Pack 6, 98, ME, 2000, or XP
- One of the following Acrobat viewers:
  - Acrobat Reader 4.05 or greater (Web Only)
  - Acrobat 4.05 or greater
  - Acrobat Approval 5 or greater
- One of the following:
  - Internet Explorer 5.0 and above
  - Netscape 4.6 and above
  - Lotus Notes 5.0 or above. (Only if using Lotus Notes Client database)

\*\*Note: When using Windows 95 or Windows NT 4, the browser plug-ins will not be installed. Full eReview functionality will be available, but the user will be prompted to login when opening a review.

Macintosh:

- Mac OS 9.0 and above. (See Section 4.1 for Mac OS X instructions)
- Acrobat or Acrobat Reader 4.05 and above
- One of the following web browsers:
  - Internet Explorer 5.0 and above
  - Netscape 4.6 and above

For specific hardware requirements, see the Adobe Acrobat system requirements.

# Chapter 2 Installation

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## 2.1 Overview

This chapter covers a general overview of PDF inFusion eReview installation procedures. This includes installation of the client software, creation of the eReview database from the PDF inFusion Review Template and database specific security settings for proper functioning of the eReview database.

Database on the Server

- To install the database on a Domino server, go to [Installing the Database](#).

For Windows

- If you are installing PDF inFusion eReview for your Lotus Notes Client, go to [For Lotus Notes](#).
- If you are installing PDF inFusion eReview for your browser, go to [For a Windows Browser](#).

For Macintosh

- If you are installing PDF inFusion eReview for a Macintosh, go to [For a Macintosh Browser](#).

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## 2.2 Installing the Database

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

1. Create a new database on your Domino server using the PDFinFusionReviewTemplate.ntf.
  - 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 the database a Title and Filename.
  - d. In the templates section, choose PDF inFusion Review Template.
  - e. To access the database via the web, your domino server must be running the HTTP task.
2. By default, all design elements are signed by PDF inFusion Development. You can either leave the design elements signed by PDF inFusion Development, or you can sign them with another ID of your choice. The ID you choose to sign the design elements with must be given access in the server document to run unrestricted LotusScript agents on the Domino server.

### Signing the database with a different ID:

- a. Switch to the Notes ID with which you would like to sign the database.
  - b. Open Notes Administrator.
  - c. Highlight the correct database.
  - d. Choose Sign Database.
3. Access control list (ACL) setup for the database:

- a. 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, with the *AgentRunner* role.
- b. For web access, add the Anonymous user to the ACL with No Access. This will force users accessing the database via a web browser to authenticate, thus, capturing important session data such as the username.
- c. The database has the following roles:
  - DBManager – Can edit the database logging page.
  - ReviewManager – Can see all reviews restricted and unrestricted reviews in the database.
  - TemplateCreator – Will have the option to go to the Administration page and create templates.
  - AgentRunner – Allows the agents to be run on Annotations.

### **Execution Control List Settings (ECL)**

You must add the signer of the database to your Administration ECL settings. With the signer of the agents user id logged into the Lotus Notes client, go to File\Preferences\User Preferences, then click "Security Options"). The required settings are:

#### Workstation Security

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

#### 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:
  - a. Source window
  - b. Other window from same host
- Allow Write Data Access from:
  - a. Source window
  - b. Other window from same host
- Allow Open Access to:
  - a. URL on same host

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## **2.3 Lotus Sametime Integration**

PDF inFusion eReview includes integration with the Lotus Sametime instant messaging server. The eReview Acrobat plug-in for Windows can act as a Sametime client, allowing a user to view the online status of, and chat with, other reviewers.

The Sametime integration requires that the eReview database be hosted on a Domino server using session-based authentication. The eReview database need not be hosted on the same machine as the Sametime server; however, the Sametime server must be a member of the same Domino domain as the eReview server (i.e., the authentication information for a user must be valid for both servers). The eReview server must also have SSO enabled.

In addition, PDF inFusion eReview does not support a user logging-into multiple reviews using different Sametime credentials – this can result in unpredictable behavior.

The eReview database must be able to determine the name of the Sametime server. To accomplish this, a file `hostAddress.xml` must be present on the server, and accessible via HTTP. The excerpt below from the “Sametime Toolkit Guide” explains more about this file:

```
A more reliable, efficient, and flexible method is to deploy a special XML file, hostAddress.xml, on the application server. This file contains a near Sametime server location. This method requires some simple administrator intervention but uses less code, performs more efficient lookup, works with both Domino and LDAP directories, and works with both anonymous and authenticated access.
```

The format of this XML file is:

```
<?xml version="1.0" encoding="UTF-8" ?>
<sametime>
  <hostAddress>myhost.lotus.com</hostAddress>
  <httpPort>80</httpPort>
</sametime>
```

Note that the host address and the port are the address (DNS name) and port of the HTTP server associated with the Sametime server. These are the address and port that you use to access Web pages on the Sametime server. These are not the DNS name and port used for HTTP tunneling to the Sametime Community server.

The Sametime 3.0 server installation process generates this XML file, inserting the address of the Sametime server on which the toolkits are installed. It then stores the file in the "sametime" directory under the HTML root.

You must deploy this XML file to the same location (the `sametime` directory under the HTML root) on all your application servers. The application can then use HTTP to read the address of the Sametime server from this XML file. The Sametime server whose address appears in the XML file is not necessarily the user's home server; however, it will redirect the user to the appropriate home server.

The “General Review Settings” section of the review creation pages allows the review initiator to determine whether or not the Sametime integration will be enabled for a particular review.

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## 2.4 For Lotus Notes

1. Close all open applications.
2. Run `Setup.exe`.

3. Follow the install instructions on your screen.
  4. When the install is complete, the window will close automatically or prompt you to reboot your computer.
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## **2.5 For a Windows Browser**

1. Close all open applications.
  2. Run PDFiWeb.exe.
  3. Follow the install instructions on your screen.
- 

## **2.6 For a Macintosh Browser**

1. Close all open applications.
2. Extract the entire contents of the PDFiInstaller.sit file. This will extract all files to the location you specify in a folder called PDFi Mac Installer.
3. Open the PDFi Mac Installer folder.
4. Double click on PDFi eReview Installer.
5. Follow the install instructions on your screen.

# Chapter 3 Agent Setup

## 3.1 Description of Scheduled Agents

PDF inFusion contains several agents that run on a Domino server. These agents handle various tasks within the database. In order to reduce replication conflicts, set the agents to run on one server.

**\*\*Note:** The CreateXML and CreateAnnotation agents must be set to Run as Web User.

- eReview Notification: Notifications for a review are set up by the originator when creating a new review. Each annotation made by a reviewer has properties that can be set (Action, Category, Status, etc.). The originator of a review can configure a notification to be sent to a person when an annotation is created which includes a particular value for a particular property. The agent finds the associated email address and sends out the email to “notify” the person an annotation was made which requires their attention.
- Delete Deleted Annotations: When annotations are viewed in the PDF, they can be deleted in the filter dialog. When deleting annotations in the filter dialog, a field called “deleted” on the annotation document is set to a value of “Yes”. This agent then performs the actual deletion of the annotation from the database.
- Delete Orphans: This is a clean-up agent. Occasionally response documents may be left without a parent. This documents searches all documents in the database making sure all response documents have parents. If the response document does not have a parent it is deleted.
- Empty Recycle Bin: When a review is marked to be deleted it is sent to the recycle bin view. Once in this view it can be marked to be undeleted and removed from the view. When this agents runs, any documents in the Recycle Bin view will be deleted from the database and unrecoverable.
- Process Late Reviews: A review can be given an expiration date. When a review has reached its expiration date, this agent will notify any reviewers that have not completed their reviews.
- CleanupStartReviews: If a review is started and does not go through the complete review creation process, it is saved with the temporary form value of “startreview”. Once all of the review creation steps are completed, the review document’s form is set to its final value (“PDF Viewer”). This agent deletes all documents with a form value of “startreview”.

## 3.2 Agent Setup

1. Open the database in Lotus Domino Designer.
2. Ensure that all desired agents are enabled to run on the server. The default server is Any Server, but it is recommended that you specify a server for scheduled agents.

**To specify a server:**

- a. With the agent opened in Lotus Domino Designer.
- b. Click on the Schedule button.
- c. Choose the server on which you would like the agent to run.
- d. Save the Agent.

# Chapter 4 Troubleshooting

## 4.1 FAQ

- When opening a PDF document, after logging-in to PDF inFusion, the user receives the error “PDF inFusion was unable to contact the annotation server. If you are behind a firewall, make sure it is configured to allow HTTP access to Acrobat. PDF inFusion functionality will be disabled. Close the PDF document and reopen it to try again.”

If the user has a personal firewall on his or her machine, make sure that Acrobat has been granted HTTP access.

Note: This will only occur if the PDF inFusion web browser integration is not functioning properly, or you are accessing a pre-5.0 database. (See FAQ entries below regarding browser plug-in/ocx)

- There are replication conflicts in the database.  
Make sure none of the agents are set to run on “Any Server”. All agents should be set to run on a specific server.
- The user is never prompted for authentication, but the PDF inFusion annotation tools are enabled.  
Make sure Anonymous is in the ACL with No Access.
- The user creates an annotation and the user name in the Annotation Properties Dialog is Anonymous User.  
Make sure Anonymous is in the ACL with No Access.
- The PDF loads in the browser but you cannot see PDF inFusion tools in the toolbar.  
Verify that the PDF inFusion plug-in is loading.
  - Windows: Bring Acrobat to the front. Click on the Help Menu. Under About Plug-ins you should see PDF inFusion. If using Acrobat 5 it will be under About 3<sup>rd</sup> Party Plug-ins.
  - Macintosh: Bring Acrobat to the front. Click on the Apple Menu. Under About Plug-ins you should see PDF inFusion. If using Acrobat 5 it will be under About 3<sup>rd</sup> Party Plug-ins.
  - Make sure the certified plug-ins only checkbox is deselected in Acrobat. Verify this under the Edit/Preferences/General - Options menu for Acrobat 5 and under File/Preferences/General for Acrobat 4.
  - Make sure the CreateXML agent is present in the database. If it is, then the code may have been erased or corrupted. It must be replaced with the agent from the template.
- Get “The page cannot be displayed” error message when trying to open a document or form on the web.

This error occurs when the signer of the agents in the database does not have unrestricted access to run agents on the server.

- When trying to open a PDF inFusion document you repeatedly get the login and it does not open the document.

This is caused by the signer of the agents not having at least editor access in the database ACL.

- While saving an annotation, the user gets a "Communications error occurred while saving the annotation", then "Error creating the annotation" message.

This may be caused by either the CreateAnnotation agent not being present in the database, or by the agent code having been erased or corrupted. The agent will need to be added or replaced from the template.

- The PDF infusion eReview Netscape plug-in does not appear under Help/About Plug-ins in Netscape.

On Windows, the Netscape plug-in should reside in the \plugins folder under the Netscape program directory. On the Mac, the Netscape plug-in (also used by IE) should reside under the Acrobat viewer's :plugins:PDFinFus folder, with an alias to the plug-in file residing in the browser's Plugins folder.

- The Internet Explorer OCX is not registered.

If the PDF inFusion Internet Explorer control is not installed and registered properly, the user will be prompted to login to a review a second time. The OCX should reside under the \Program Files\Common Files\PDFi Common folder, and can be registered using regsvr32.exe:

Example:

```
regsvr32.exe C:\Program Files\Common Files\PDFi Common \PDFiBrowserControl.ocx
```

- When opening a review, the user is prompted for a second login.

This can happen for two reasons:

- 1) The user is accessing a database that has a pre-5.0 design, or
- 2) The PDF inFusion web browser integration components are not installed properly (See the FAQ entry above regarding this issue)

- How to send and/or create a PDF inFusion log file.

1. Open your Acrobat application.
2. On Windows, in Acrobat 5, click on Help\About 3<sup>rd</sup> Party Plugins\PDF inFusion. In Acrobat 4, click on Help\About Plugins\PDF inFusion.
3. On a Mac, in Acrobat 5, click on the Apple menu\About 3<sup>rd</sup> Party Plugins\PDF inFusion. In Acrobat 4, click on the Apple menu\About Plugin\PDF inFusion.
4. Click on the *Log File* button. The Log window will open.
5. If Log Path says "No Log File", a log file does not exist and will need to be created. Click on *Create Log* button. Log Path will show the path to the log file and the information box will contain the log data.
6. Close the Log window and the About dialog. Repeat the process that was causing the problem to allow the pertinent process information to be logged.
7. Go to the file listed in Log Path on the Log dialog and send it to PDFiSupport@itmproducts.com.

- When printing annotations, the summary for highlighters and strikethrough annotations say “UNKNOWN (This Strikethrough must have been created with a version of PDFi prior to 4.6)”

This is caused when the annotation is created with a plugin or database whose version is 4.5 or earlier. In order to store the selected text both the database and PDF inFusion plug-in need to be version 4.6 or above.

- PDF inFusion is not supported on OS X when using either Acrobat or a web browser running in native mode. An Acrobat limitation prevents PDFs from being displayed within the browser window in these circumstances.

Here is the excerpt from the Adobe Knowledgebase from the web, which includes a workaround:

#### Running Acrobat Isn't Supported Within a Web Browser in Mac OS X

Running Acrobat 5.0.5 within a Web browser (for example, Microsoft Internet Explorer or Netscape Navigator) isn't supported in Mac OS X because the Acrobat 5.x browser plug-in isn't carbonized. To use Online Comments or complete PDF forms in a Web browser in Mac OS X, you must start Acrobat as a Classic application, and then view the PDF file in a Classic Web browser, such as Netscape 4.7.

To start Acrobat in Classic mode:

1. Select the Acrobat application icon.
2. Choose File > Show Info.
3. Select Open in the Classic Environment.

# Chapter 5 PDF inFusion Support

## 5.1 Support

While this documentation provides the information you need to understand and administer PDF inFusion eReview, there may be times when additional information or assistance is needed. If the additional documentation (User Documentation and Developer Documentation) does not provide the information you need:

- 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: [PDFiSupport@itmproducts.com](mailto:PDFiSupport@itmproducts.com).

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