

# **PDF inFusion eReview 4.6**

Administration Documentation



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February 2002  
PDF inFusion™ eReview 4.6

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# Chapter 1 PDF inFusion eReview Administration

[1.1 Overview](#)

[1.2 Server System Requirements](#)

[1.3 Installing the Database](#)

[1.4 Execution Control List Settings \(ECL\)](#)

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## 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.

PDF inFusion eReview includes 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 eReview 4.6 User Documentation.

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.

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## 1.2 Server System Requirements

The sample database that is supplied with PDF inFusion eReview requires a Domino 5.x server; however, the base eReview database functionality will work with a Domino 4.6 server should you choose to design a customized database.

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## 1.3 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 it a Title and Filename.

- d. In the templates section, choose PDF inFusion Review Template.  
NOTE: Your domino server must be running the HTTP task, so that the database can be accessed via URL.
  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.
  3. 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.
  4. 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.
    - 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.
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#### **1.4 Execution Control List Settings (ECL)**

You must add the signer of the database to your Administration ECL settings. 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
- 

## 1.5 Agent Setup

The following agents need to be configured in the database:

1. Action Notification Scheduled – Sends an email to the associated individuals when an annotation is created that matches the notification criteria.
2. Category Notification Scheduled - Sends an email to the associated individuals when an annotation is created that matches the notification criteria.
3. Stamp Notification Scheduled - Sends an email to the associated individuals when an annotation is created that matches the notification criteria.
4. Annotation Response Notification – Each time a response is made to an annotation the creator of the annotation gets an email.
5. Delete Deleted Annotations – Deletes annotations from the database that have been marked deleted in the filter dialog.
6. Delete Orphans – Deletes any response documents that do not have parents.
7. Empty Recycle Bin – Deletes all documents in the Recycled view.
8. Process Late Reviews – Sends out emails to the people that have completed their review in the given amount of time.

To set up an agent:

1. Open the database in Notes Designer.
2. 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 a server.
3. To specify a server
  - a. Click on the Schedule button.
  - b. Choose which server you would like the agent to run on
  - c. Save Agent

# Chapter 2 Troubleshooting

## [2.1 FAQ](#)

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### 2.1 FAQ

1. The user is opening the PDF document and after logging in to PDF inFusion they get 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.

2. There are replication conflicts in the database.

Make sure all agents are not set to run on "Any Server". If so, they should be set to run on a specific server.

3. If 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.

4. The user makes an annotation and the user name in the Annotation Properties Dialog is Anonymous User.

Make sure Anonymous is in the ACL with No Access.

5. 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. Go to Edit/Preferences/Options to verify.
- Make sure the CreateXML agent is present in the database. If it is then the code may have been erased. It must be replaced with the agent from the template.

6. Get "The page cannot be displayed" when trying to open a document or form on the web.

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

7. 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.

8. Get a "Communications error occurred while saving the annotation", then "Error creating the annotation", while saving an annotation.

This can be caused by the CreateAnnotation agent not being present in the database or all the code has gotten erased. The agent will need to be added or replaced from the template.

# Chapter 3 PDF inFusion Support

## [3.1 Support](#)

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### **3.1 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: [pdfsupport@itmproducts.com](mailto:pdfsupport@itmproducts.com).

ITM will provide timely responses to support questions from PDF inFusion users that have purchased a PDF inFusion Maintenance Agreement.

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