inFusion eReview 5.13

Administration Documentation

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Chapter 1   Introduction

1.1   Overview

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 install for a combined seamless infusion eReview/Acrobat installation, please contact infusion eReview Support for more information.

1.2   System Requirements

On the server:

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

On the user's machine:

- Windows XP, Vista, 7, 8 or 10
- One of the following Acrobat viewers:
  - Acrobat Reader X or greater
  - Acrobat Standard/Pro X or greater
- One of the following web browsers configured to display PDFs using Acrobat/Reader within the browser:
  - Internet Explorer 9 and above
  - Firefox 3 and above

For specific hardware requirements, check the Adobe Acrobat requirements.

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Chapter 2 Installation

2.1   Overview

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

- To install the database on a Domino server, go to *Installing the Database*.
- If you are installing inFusion eReview for your browser, go to *For a Windows Browser*.

2.2   Installing the Database

To set up the eReview database, infusion eReview provides a Lotus Notes database template named "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 infusion eReview 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, 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.
- Moderator – Can act as a Moderator for all reviews in the database.

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

2.3 Windows Client Installation

To install the Acrobat plug-in for Windows on a client machine, follow these steps:

1. Close all open applications - especially any Acrobat viewers and web browsers.
2. Run eReview.exe.

3. Follow the install instructions on your screen.

Certain Acrobat/Reader preferences may need to be configured in order for inFusion eReview to successfully communicate with the server.

- For IE users, on the Security (Enhanced) tab of the Preferences screen:
  - Uncheck "Enable Protected Mode at Startup"
  - Uncheck "Enable Enhanced Security"
  - Check "Automatically trust sites from my Win OS security zones"
  - Click "Add Host" and add your eReview server to this area
  - Restart Acrobat/Reader
- If you continue to have issues:
  - Go to the Security tab of the Internet Options for IE
  - Click on the Trusted Sites zone and then the Sites button
  - Add the eReview server to the list of trusted sites

Chapter 3   Agent Setup

3.1   Description of Scheduled Agents

inFusion eReview 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 configured by the originator when creating a new review. Each annotation created 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. Deleted annotation are not actually deleted, but have a field called "deleted" on the annotation document 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 agent searches all documents in the database deleting response documents that have no parent.

- 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 are deleted from the database and unrecoverable.

- Process Late Reviews: An expiration date can be specified for a review. 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 specific server for scheduled agents to avoid replication conflicts.
   To specify a server:

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

Chapter 4   Troubleshooting

4.1   FAQ

- When opening a eReview review, after logging-in to inFusion eReview, the user receives the error "inFusion eReview was unable to contact the annotation server. If you are behind a firewall, make sure it is configured to allow HTTP access to Acrobat. inFusion eReview 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 inFusion eReview 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 inFusion eReview annotation tools are enabled.

  Make sure Anonymous is in the eReview database 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 eReview database ACL with No Access.

- The PDF loads in the browser but you cannot see inFusion eReview tools in the toolbar.

  Verify that the inFusion eReview plug-in is loading.

    - Bring Acrobat to the front. Click on the Help Menu. Under About Plug-ins you should see inFusion eReview.
    - Make sure the certified plug-ins only checkbox is deselected in Acrobat. Verify this under the General tab of the Preferences dialog.
    - 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.

- "The page cannot be displayed" error message is received 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 an inFusion eReview document you repeatedly get the login and it does not open the document.

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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.

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

  This can occur if the user is accessing a database that has a pre-5.0 design, or if the Acrobat preferences are not set correctly (see section 2.4 above).

- How to create and send an inFusion eReview log file.
    1. Open your Acrobat application.
    2. Click on Help\About Third-Party Plugins\inFusion eReview.
    3. Click on the *Log File* button. The Log window will open.
    4. If Log Path says "No Log File", a log file does not exist and will need to be created. Click the *Create Log* button. Log Path will show the path to the log file and the information box will contain the log data.
    5. 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.
    6. Go to the file listed in Log Path on the Log dialog and send it to inFusionSupport@itmassociates.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 inFusion eReview plug-in need to be version 4.6 or above.

- When opening a review document, "Agent Done" is dispolayed and a notes exception on the "getDocumentByUNID" is thrown to the server console.

  In the eReview database ACL, uncheck the Read/Write Public Documents options for Anonymous and Default.

Chapter 5   inFusion eReview Support

5.1   Support

While this documentation provides the information you need to understand and administer 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 inFusion eReview was purchased from an 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 Associates via email to: inFusionSupport@itmassociates.com.

ITM will provide timely responses to support questions from infusion eReview users that have purchased an inFusion Maintenance Agreement.

For the latest information on inFusion products and services, please visit www.itmassociates.com.