

Formtek PDF Rendering Extension

One of the Formtek Software Extensions for Alfresco

Administrator's Guide

Release 2.2
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Copyright

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Table of Contents

| | |
|--|-----------|
| List of Figures | iv |
| About This Guide | v |
| Conventions | v |
| Organization | vi |
| Assumptions | vi |
| Related Documents | vi |
| Your Comments are Welcome | vii |
| Overview | 1 |
| Software Requirements | 2 |
| Alfresco Server Requirements | 2 |
| Supported Browsers | 3 |
| Installation | 4 |
| Optional Configuration | 8 |
| Using the Alfresco Admin Console | 11 |
| Updating the alfresco-global.properties File | 13 |
| Uninstall | 14 |

List of Figures

| | |
|---|----|
| Figure 1: Formtek Extensions for Alfresco..... | 1 |
| Figure 2: Admin Console - Formtek Configuration Section | 11 |
| Figure 3: Admin Console – PDF Watermarking..... | 12 |

About This Guide

This guide explains how to install, configure, and uninstall the Formtek PDF Rendering Extension product developed by Formtek®.

Conventions

Some conventions used in this guide are as follows:

- Formtek PDF Rendering Extension is sometimes abbreviated as PDF Rendering Extension.

The following typographical conventions are used in this guide:

| Convention | Meaning |
|----------------------|---|
| <u>Underline</u> | Indicates references to other sections or subsections. Underline is also used to indicate emphasis. |
| <i>Italic</i> | Indicates a variable or other information you must provide. Substitute an appropriate value for the variable. Italics is also used when referencing other guides. |
| Bold | Indicates information you must type exactly as it is shown. Bold is also used to identify a file or folder you must select. |
| <code>Courier</code> | Indicates command syntax, sample commands, and HTML/JSP source |
| [] | Indicates optional arguments in a command line |

Organization

This guide is organized as follows:

| Section | Description |
|------------------------|--|
| About This Guide | Provides an overview of this guide, how it is organized, and how to use it |
| Overview | Provides an overview of the PDF Rendering Extension |
| Software Requirements | Identifies the software required by the PDF Rendering Extension |
| Installation | Provides step-by-step instructions for installing the PDF Rendering Extension on a Windows [®] or Linux [®] platform |
| Optional Configuration | Provides information and steps on additional PDF Rendering Extension configuration that is not required |
| Uninstall | Provides step-by-step instructions for uninstalling the PDF Rendering Extension on a Windows or Linux platform |

Assumptions

This guide assumes you have a working knowledge of the Alfresco content repository concepts.

Related Documents

Before using the Formtek PDF Rendering Extension software, read the most recent *Formtek PDF Rendering Extension Product Release Notes, Release 2.2*. It identifies what's new in this release, lists issues corrected in this release, describes any open issues and workarounds, and highlights the extension features.

Your Comments are Welcome

We value your comments as a user of Formtek products and would like to hear from you. Please let us know if you find any errors in this guide or have any suggestions for improving it. We encourage you to tell us what you liked or disliked about this or any other Formtek documentation.

Please send your comments to:

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Or, e-mail us at support@formtek.com.

If you would like a reply, please provide your name, address, telephone number, and e-mail address.

NOTE

If you have a problem or question with the software, please contact Formtek Support at:

Phone: 1 (800) 2 GET ANS (1-800-243-8267)

Fax: (412) 788-9429

E-mail: support@formtek.com

Or, log on to the Formtek Support website at:

<http://support.formtek.com/Login.asp>

Overview

Formtek has developed a set of extensions for the Alfresco® Enterprise Content Management (ECM) system. The Formtek PDF Rendering Extension product is one of the extensions offered by Formtek for the Alfresco content platform as illustrated in Figure 1.



Figure 1: Formtek Extensions for Alfresco

The Formtek PDF Rendering Extension product is integrated with the Alfresco Share application to allow you to create an on-demand PDF rendition of documents stored in the Alfresco repository. An optional watermark can also be included in the PDF rendition. The PDF Rendering Extension supports many file types supported by Alfresco.

NOTE

If the Formtek EDM Module product is installed, this extension also transforms DWG™, DXF™, and DWF™ file formats into PDF.

The Formtek PDF Rendering Extension is free and its source code is available for download at <http://formtek.com/source/formtek-pdf-ext-22-source.zip>.

Software Requirements

This section identifies the software installations required by the Formtek PDF Rendering Extension product.

Alfresco Server Requirements

The PDF Rendering Extension requires an installed Alfresco content repository server on one of the following platforms with the specified Alfresco software version.

| Platform | Alfresco Software Version |
|------------------|---|
| Windows (64-bit) | Alfresco One 5.0.x configured with: <ul style="list-style-type: none"> • ImageMagick 6.8.6 |
| Linux (64-bit) | Alfresco One 5.0.x configured with: <ul style="list-style-type: none"> • ImageMagick 6.8.6 |

Please refer to <http://alfresco.com/services/subscription/supported-platforms> for the list of Windows and Linux versions Alfresco One 5.0.x supports, as well as other components of Alfresco's supported stack.

NOTES

For Alfresco One 4.2.x support, use the Formtek PDF Rendering Extension 2.1.1 product release.

For Alfresco Enterprise 4.1.x support, use the Formtek PDF Rendering Extension 2.0.1 product release.

For Alfresco Enterprise 4.0.x support, use the Formtek PDF Rendering Extension 2.0 product release.

For Alfresco Enterprise 3.4.x support, use the Formtek PDF Rendering Extension 1.0 product release.

Supported Browsers

The PDF Rendering Extension supports the following browsers:

- Microsoft Internet Explorer 9, 10, and 11
- Mozilla Firefox (Tested with versions 38-39)
- Google Chrome (Tested with version 43)

Installation

The Formtek PDF Rendering Extension software distribution files are as follows:

| Distribution File | Contents | Platform |
|--------------------------------------|--------------------------------|----------|
| ftk_pdf_extension_repo22-linux.zip | Alfresco repository extensions | Linux |
| ftk_pdf_extension_repo22-windows.zip | Alfresco repository extensions | Windows |
| ftk_pdf_extension_share22.zip | Alfresco Share extensions | All |

Follow the steps below to install the Formtek PDF Rendering Extension software.

IMPORTANT!

If you previously installed the Formtek PDF Rendering 2.2 release on this Alfresco server, you must uninstall it before installing this release. See [Uninstall](#) on page 14 for detailed instructions.

1. As a privileged user, shut down the Alfresco repository server.
2. Depending on your platform, copy the **ftk_pdf_extension_repo22-windows.zip** or **ftk_pdf_extension_repo22-linux.zip** file to the Alfresco repository server.
3. Extract the contents of the zip file to the Alfresco installation directory (i.e., ALF_HOME) and overwrite any existing files.

On the Windows platform only, this creates the following directory, which is referred to as EXT_HOME:

Windows: <ALF_HOME>\formtek\pdf_rendering

The **ftk_pdf_extension_repo-win-E5.0.X.amp** or **ftk_pdf_extension_repo-linux-E5.0.X.amp** file is added to the following location:

Windows: <ALF_HOME>\amps

Linux: <ALF_HOME>/amps

4. On a Windows platform, open a Command Prompt window with elevated privileges.
5. Change to the Alfresco installation directory (i.e., ALF_HOME), for example, /opt/alfresco-5.0.1.

6. Run the following command to install the PDF Rendering Extension repository AMP:

Windows: `java -jar bin\alfresco-mmt.jar install amps\ftk_pdf_extension_repo-win-E5.0.X.amp <AlfrescoWARFile> -force -verbose`
Linux: `java -jar bin/alfresco-mmt.jar install amps/ftk_pdf_extension_repo-linux-E5.0.X.amp <AlfrescoWARFile> -force -verbose`

For example:

```
java -jar bin/alfresco-mmt.jar install amps/ftk_pdf_extension_repo-linux-E5.0.X.amp tomcat/webapps/alfresco.war -force -verbose
```

```
Installing AMP 'amps/ftk_pdf_extension_repo-linux-E5.0.X.amp' into WAR 'tomcat/webapps/alfresco.war'
Backing up WAR file...
WAR has been backed up to '/opt/alfresco-5.0.1/tomcat/webapps/alfresco.war-1436900773831.bak'
INFO: Checking the war version using /WEB-INF/classes/alfresco/version.properties
Adding files relating to version '2.2' of module 'com.formtek.pdf.watermark.repo'
- File '/WEB-INF/lib//ftk_about_repo-E5.0.X.jar' added to war from amp
- File '/WEB-INF/lib//ftk_pdf_extension_repo-linux-E5.0.X.jar' added to war from amp
- File '/WEB-INF/lib//ftk_pdf_watermark-E5.0.X.jar' added to war from amp
- File '/WEB-INF/lib//itextpdf-5.4.4.jar' added to war from amp
```

7. Delete the **alfresco** directory in the application server deployment directory, for example, `<CATALINA_HOME>/webapps` (for Tomcat).
8. On a Windows platform only, set the ImageMagick system environment variables as follows:

If ImageMagick is located in the `<ALF_HOME>\imagemagick` folder:

- a. Execute the **imagemagick_setenv.bat** script in the `<ALF_HOME>\formtek\pdf_rendering\bin` folder.

If ImageMagick is not located in the `<ALF_HOME>\imagemagick` folder:

- a. Ensure the correct version of ImageMagick is installed. See [Alfresco Server Requirements](#) on page 2 for details.
- b. Open a Command Prompt window with elevated privileges and execute the following commands where "`<imagemagick_home>`" is the root location of the ImageMagick software:

```
setx MAGICK_HOME "<imagemagick_home>" /M
setx MAGICK_CODER_MODULE_PATH "%MAGICK_HOME%\modules\coders" /M
setx MAGICK_CONFIGURE_PATH "%MAGICK_HOME%" /M
```

9. As a privileged user, shut down the Alfresco Share server.

NOTE

If the Alfresco repository and Share servers are using the same application server installation, the Share server should already be shut down.

10. Copy the **ftk_pdf_extension_share22.zip** file to the Alfresco Share server.
11. Extract the contents of the zip file to the Alfresco installation directory (i.e., ALF_HOME) and overwrite any existing files.

The **ftk_pdf_extension_share-E5.0.X.amp** file is added to the following location:

Windows: <ALF_HOME>\amps_share

Linux: <ALF_HOME>/amps_share

12. On a Windows platform, open a Command Prompt window with elevated privileges.
13. Change to the Alfresco installation directory (i.e., ALF_HOME), for example, /opt/alfresco-5.0.1.
14. Run the following command to install the PDF Rendering Extension Share AMP:

Windows: java -jar bin\alfresco-mmt.jar install amps_share\ftk_pdf_extension_share-E5.0.X.amp <ShareWARFile> -force -verbose

Linux: java -jar bin/alfresco-mmt.jar install amps_share/ftk_pdf_extension_share-E5.0.X.amp <ShareWARFile> -force -verbose

For example:

```
java -jar bin/alfresco-mmt.jar install amps_share/ftk_pdf_extension_share-E5.0.X.amp tomcat/webapps/share.war -force -verbose
```

```
Installing AMP 'amps_share/ftk_pdf_extension_share-E5.0.X.amp' into WAR
'tomcat/webapps/share.war'
Backing up WAR file...
WAR has been backed up to '/opt/alfresco-5.0.1/tomcat/webapps/share.war-
1436900795924.bak'
INFO: Checking the war version using the manifest.
Adding files relating to version '2.2' of module
'com.formtek.pdf.watermark.share'
- File '/WEB-INF/lib//ftk_about_share-E5.0.X.jar' added to war from amp
- File '/WEB-INF/lib//ftk_pdf_extension_share-E5.0.X.jar' added to war
from amp
```

15. Delete the **share** directory in the application server deployment directory, for example, `<CATALINA_HOME>/webapps`.
16. Restart the Alfresco repository and Share servers.

The Formtek PDF Rendering Extension software is now installed and ready to use. See [Optional Configuration](#) on page 8 for any optional configuration you may want to complete.

Optional Configuration

This section describes the optional configuration items for the PDF Rendering Extension software. The following table lists the configurable PDF Rendering Extension properties:

| Property Name | Admin Console Field & Description |
|--|---|
| <code>ftk.root</code> | <p>Formtek Root Directory Path</p> <p>This property is currently <u>not</u> used.</p> |
| <code>pdf.bin.dir</code> | <p>PDF Rendering Root Directory Path</p> <p>Although this property is currently <u>not</u> used, the default value is:</p> <p><code>\${ftk.root}/pdf_rendering/bin</code> (Linux) <code>\${ftk.root}\pdf_rendering\bin</code> (Windows)</p> <p>NOTE: The default Linux path currently does not exist.</p> |
| <code>pdf.watermark.beforeAfter</code> | <p>Before/After Properties</p> <p>When PDF watermarking is enabled, this determines whether the watermark text (defined by the <code>pdf.watermark.text</code> property) is displayed before or after the watermark properties (defined by the <code>pdf.watermark.properties</code> property).</p> <p>The valid values are:</p> <ul style="list-style-type: none"> • before (Default) • after |
| <code>pdf.watermark.dateformat</code> | <p>Date Format</p> <p>When PDF watermarking is enabled, the watermark uses this format for date properties specified in the <code>pdf.watermark.properties</code> property.</p> <p>The valid values are:</p> <ul style="list-style-type: none"> • dd/MM/yyyy (Default) • MM/dd/yyyy • yyyy/MM/dd |

| Property Name | Admin Console Field & Description |
|-------------------------|---|
| pdf.watermark.delimiter | <p>Delimiter</p> <p>When PDF watermarking is enabled, the watermark uses this delimiter between the properties specified in the pdf.watermark.properties property.</p> <p>The valid values are:</p> <ul style="list-style-type: none"> • underscore (Default) • hyphen • comma • colon • semicolon • space |
| pdf.watermark.enabled | <p>PDF Watermarking Enabled</p> <p>This indicates whether a watermark is included in the PDF file generated by the Download PDF Rendition command. The valid values are:</p> <ul style="list-style-type: none"> • false (Default) • true |
| pdf.watermark.font | <p>Font</p> <p>When PDF watermarking is enabled, the watermark uses this font.</p> <p>The valid values are:</p> <ul style="list-style-type: none"> • Courier (Default) • Helvetica • Times-Roman |
| pdf.watermark.location | <p>Location</p> <p>When PDF watermarking is enabled, the watermark is placed in this location in the PDF file.</p> <p>The valid values are:</p> <ul style="list-style-type: none"> • top (Default) • center • bottom • diagonal |

| Property Name | Admin Console Field & Description |
|--------------------------|---|
| pdf.watermark.pointsize | <p>Pointsize</p> <p>When PDF watermarking is enabled, the watermark uses this pointsize.</p> <p>The valid values are:</p> <ul style="list-style-type: none"> • 7 • 10 • 14 • 20 (Default) • 28 • 36 • 48 • 72 |
| pdf.watermark.properties | <p>Watermark Properties</p> <p>When PDF watermarking is enabled, the watermark comprises this set of properties. You can specify any property using the <i>namespacePrefix:propertyName</i> format and a comma to separate properties.</p> <p>The default value is:</p> <p>cm:author,cm:name,cm:creator,cm:created,cm:versionLabel</p> <p>NOTE: The comma delimiter in this property is <u>not</u> included in the watermark. The <code>pdf.watermark.delimiter</code> property defines the delimiter in the actual watermark.</p> |
| pdf.watermark.text | <p>Watermark Text</p> <p>When PDF watermarking is enabled, the watermark includes this text before or after the properties specified by the <code>pdf.watermark.properties</code> property based on the <code>pdf.watermark.beforeAfter</code> property.</p> <p>By default, no text is included in the watermark.</p> |

You can use the Alfresco Admin Console to complete this configuration, or you can update the **alfresco-global.properties** file to include the optional PDF Rendering Extension properties. This section provides instructions for both configuration methods.

Using the Alfresco Admin Console

To complete the optional PDF Rendering Extension configuration using the Alfresco Admin Console, follow the steps below.

1. As a user with administrative privileges, log on to the Alfresco Admin Console at the following URL:

`http://AlfrescoServerAddress:port/alfresco/service/enterprise/admin`

The Formtek section is included at the bottom left panel as shown in Figure 2.

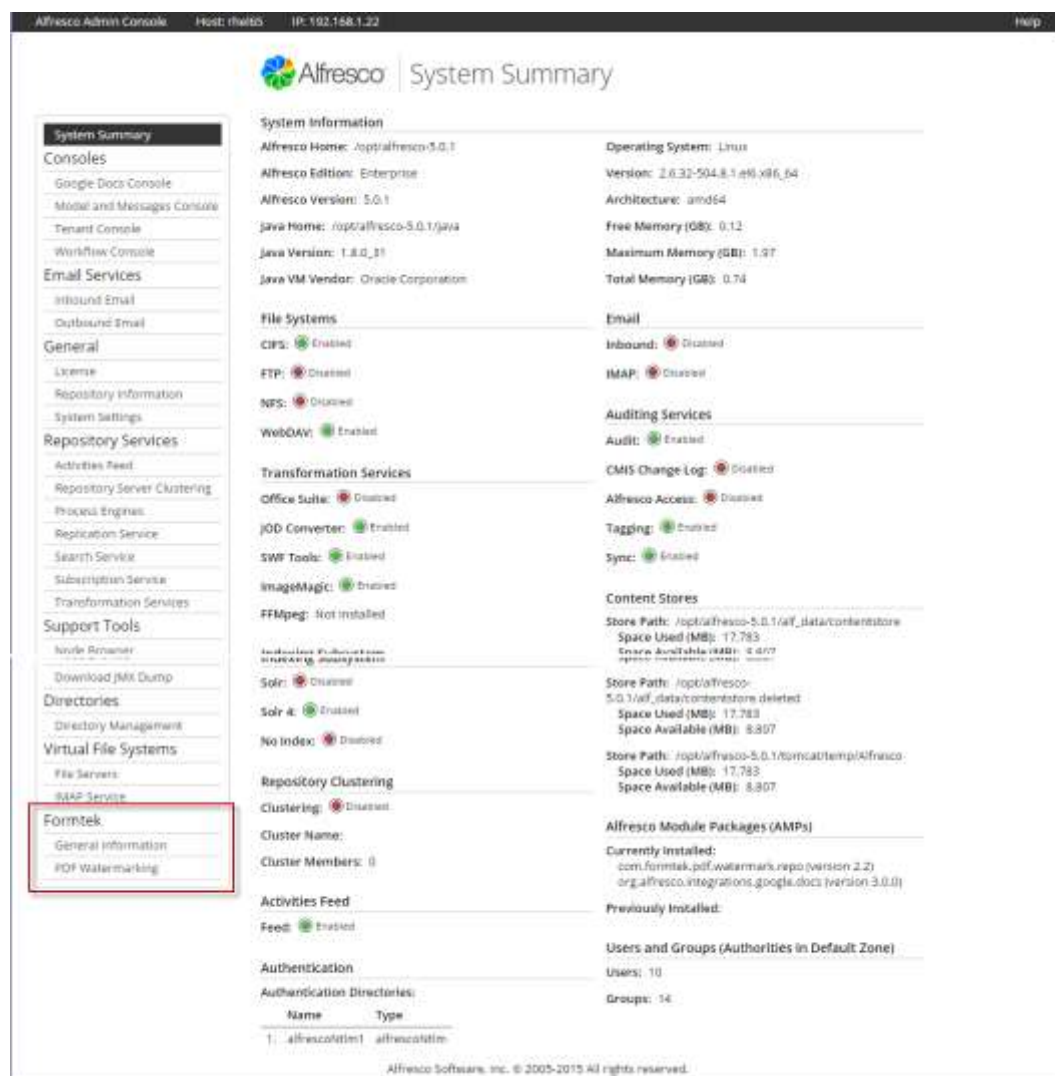


Figure 2: Admin Console - Formtek Configuration Section

- Click the PDF Watermarking link in the Formtek section to display the PDF Watermarking configuration page:

The screenshot shows the Alfresco Admin Console interface for the PDF Watermarking configuration. On the left is a sidebar with a tree view of system components, with 'PDF Watermarking' selected under the 'Formtek' section. The main content area is titled 'PDF Watermarking' and includes the following sections:

- PDF Watermarking:** A checkbox for 'PDF Watermarking Enabled' is checked. Below it, a note states: 'Enables or disables watermarking in the PDF transformation that results from the Download PDF Rendering action command.'
- PDF Rendering Root Directory Path:** A text input field contains '\$%Nk.root/pdf_rendering/bin'. A note below reads: 'RDP: Its root is defined on the Formtek General Information page.'
- Watermark Parameters:**
 - Watermark Properties:** A text input field contains 'cm:author,cm:name,cm:creator,cm:created,cm:versionLabel'. A note below says: 'Specify properties separated by a comma to include in the watermark.'
 - Watermark Text:** An empty text input field. A note below says: 'Specify free text (up to 25 characters) to include in the watermark.'
 - Font:** A dropdown menu set to 'Courier'.
 - Pointsize:** A dropdown menu set to '20'.
 - Location:** A dropdown menu set to 'Top'.
 - Date Format:** A dropdown menu set to 'dd/MM/yyyy'.
- Delimiter:** A dropdown menu set to 'Underscore'. A note below says: 'Choose a delimiter to display between properties in the watermark.'
- Before/After Properties:** A dropdown menu set to 'Before'. A note below says: 'If watermark properties are specified, choose whether to display the watermark text before or after the watermark properties.'

At the bottom of the configuration area are 'Save' and 'Cancel' buttons. The footer of the page reads: '© 2010-2015 Formtek, Inc. All rights reserved. www.formtek.com'.

Figure 3: Admin Console – PDF Watermarking

- Modify the settings as necessary, and then click Save to automatically restart the **thirdparty** subsystem with your changes in effect.

NOTE

The settings you save in the Admin Console take precedence over any setting you add in the **alfresco-global.properties** file.

The Formtek PDF Rendering Extension software is now configured with your changes in effect.

Updating the `alfresco-global.properties` File

To complete the optional PDF Rendering Extension configuration by updating the `alfresco-global.properties` file, follow the steps below.

NOTE

When specifying Windows paths in the `alfresco-global.properties` file, use either double backwards slashes (`\\`) or a single forward slash (`/`) as the folder separator. For example, you can specify a path as either `C:\\Alfresco\\5.0.1` or `C:/Alfresco/5.0.1`.

1. Log on to the Alfresco repository server as a user with write access.
2. Change to the `<classpathRoot>` directory, for example, `<CATALINA_HOME>\shared\classes` (for Tomcat).
3. Open the `alfresco-global.properties` file for editing.
 - a. Add any optional properties as needed, for example:

```
pdf.watermark.enabled=true
pdf.watermark.pointsize=7
```
 - b. Save and close the file.
4. Restart the Alfresco repository server for the changes to take effect.

NOTE

These settings will not be in effect if you've saved any setting using the Admin Console.

The Formtek PDF Rendering Extension software is now configured with your changes in effect.

Uninstall

Follow the steps below to uninstall the Formtek PDF Rendering Extension software.

1. As a privileged user, shut down the Alfresco repository server.
2. On a Windows platform, open a Command Prompt window with elevated privileges.
3. Change to the Alfresco installation directory (i.e., ALF_HOME), for example, /opt/alfresco-5.0.1.
4. Run the following command to uninstall the Formtek PDF Rendering Extension repository AMP:

```
Windows: java -jar bin\alfresco-mmt.jar uninstall
           com.formtek.pdf.watermark.repo <AlfrescoWARFile>
Linux:   java -jar bin/alfresco-mmt.jar uninstall
           com.formtek.pdf.watermark.repo <AlfrescoWARFile>
```

For example:

```
java -jar bin/alfresco-mmt.jar uninstall
com.formtek.pdf.watermark.repo tomcat/webapps/alfresco.war

- Removing file '/WEB-INF/lib//ftk_about_repo-E5.0.X.jar' from war
- Removing file '/WEB-INF/lib//ftk_pdf_extension_repo-linux-E5.0.X.jar' from war
- Removing file '/WEB-INF/lib//ftk_pdf_watermark-E5.0.X.jar' from war
- Removing file '/WEB-INF/lib//itextpdf-5.4.4.jar' from war
- Removing file '/WEB-INF/classes/alfresco/module/com.formtek.pdf.watermark.
repo/modifications.install' from war
- Removing file '/WEB-INF/classes/alfresco/module/com.formtek.pdf.watermark.
repo/module.properties' from war
```

5. Delete the **alfresco** directory in the application server deployment directory, for example, <CATALINA_HOME>/webapps (for Tomcat).
6. On the Windows platform only, remove the EXT_HOME folder, which defaults to the following location:

```
Windows: <ALF_HOME>\formtek\pdf_rendering
```

7. Remove the **ftk_pdf_extension_repo-win-E5.0.X.amp** or **ftk_pdf_extension_repo-linux-E5.0.X.amp** file from the following location:

```
Windows: <ALF_HOME>\amps
Linux:   <ALF_HOME>/amps
```

8. As a privileged user, shut down the Alfresco Share server.

NOTE

If the Alfresco repository and Share servers are using the same application server installation, the Share server should already be shut down.

9. On a Windows platform, open a Command Prompt window with elevated privileges.
10. Change to the Alfresco installation directory (i.e., ALF_HOME), for example, /opt/alfresco-5.0.1.
11. Run the following command to uninstall the Formtek PDF Rendering Extension Share AMP:

Windows: `java -jar bin\alfresco-mmt.jar uninstall com.formtek.pdf.watermark.share <ShareWARFile>`

Linux: `java -jar bin/alfresco-mmt.jar uninstall com.formtek.pdf.watermark.share <ShareWARFile>`

For example:

```
java -jar bin/alfresco-mmt.jar uninstall
com.formtek.pdf.watermark.share tomcat/webapps/share.war
```

```
- Removing file '/WEB-INF/lib/ftk_about_share-E5.0.X.jar' from war
- Removing file '/WEB-INF/lib/ftk_pdf_extension_share-E5.0.X.jar' from war
- Removing file '/WEB-INF/classes/alfresco/module/com.formtek.pdf.watermark.share/modifications.install' from war
- Removing file '/WEB-INF/classes/alfresco/module/com.formtek.pdf.watermark.share/module.properties' from war
```

12. Delete the **share** directory in the application server deployment directory, for example, <CATALINA_HOME>\webapps.
13. Remove the **ftk_pdf_extension_share-E5.0.X.amp** file from the following location:

Windows: <ALF_HOME>\amps_share

Linux: <ALF_HOME>/amps_share

14. Restart the Alfresco repository and Share servers.

The Formtek PDF Rendering Extension software is now uninstalled.