

# Adlib PDF OEM Installation Guide

**PRODUCT VERSION: 5.0** 

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## Installation Guide Overview

Adlib PDF is the next generation of Adlib transformation technology. Its design offers a high degree of flexibility for developing systems that provide scalability and high availability. An intuitive, interactive interface enables users to setup, configure, and troubleshoot systems which are easily configured to fulfill each user's unique requirements.

The Installation Guide provides a comprehensive list of the steps required to perform a complete Adlib PDF installation, uninstallation, and licensing of the product. Users can also choose to install and modify Adlib Components individually, according to business requirements.

This guide also contains a detailed list of all system prerequisites that must be available before installation.

#### **Typographical Conventions**

The following typographical conventions are used throughout this guide.

Item	Convention	Examples
Adlib elements	Teal, Title case	The Folder Connector integrates with file folders
Menu options & titles Push buttons	Bold	Select <b>Transformation Rules</b> from the <b>Settings</b> menu.
Settings		Click Save.
· ·		Drag Active from the Settings toolbox.
Page elements and	Italics	Navigate to the Edit tab on the Rule Set Editor page.
titles		Drag Active from the Settings toolbox to the work area.
Window titles		Define attribute settings in the Edit Attribute window.
Script	Mono code	\${Adlib.FolderConnector.InputFileExtension}
URLs	Lowercase	http://www.adlibsoftware.com/
User-defined element	Enclosed in angle brackets	C:\Adlib\ <install folder=""></install>

#### **Notes**

Notes, cautions and tips are offered throughout the guide and are quickly identified with the following icons:



Provides informational notes relevant to the content.



Provides important cautionary notes relevant to the content.



Provides helpful tips and shortcuts.

## **Terminology**

Detailed descriptions of terminology applicable to the Adlib product can be found in the Adlib PDF Glossary.

## **System Requirements**

The following prerequisites must be available prior to a complete installation of Adlib PDF. If performing a custom installation, please refer to the <u>System Requirements by Component</u> section, as each Component can be installed individually and may have differing needs.

During the installation of Adlib PDF, the user can choose to install IIS-based or Self-hosted Services Components. Software requirements are listed for all installations, regardless of the Services mode chosen. If IIS-based Services are installed, additional prerequisites are required.

Please refer to <u>Software Requirements - Additional Requirements for IIS-Based Services</u> for more information.

#### **Complete Adlib PDF Installation Requirements**

#### **Hardware Requirements**

Component	Requirement	
Processor Speed	Minimum:	1.6 GHz
	Recommended:	2.8 GHz or higher
Processing Cores	Minimum:	Single core
	Recommended:	Two cores
Memory (RAM)	Minimum:	1 GB
	Recommended:	2 GB or higher
	running inter Engine, or if	AM should be added if processing large files or if nsive applications in parallel with a Transformation a Network Load Balancing IIS Cluster with multiple lager Components is not being used.
Network	Minimum:	100 MB
	Recommended:	1 GB
Hard Disk Space	Minimum:	3.5 GB
	Recommended:	See Storage Requirements Section
All Hardware Components	launching multiple	ncreased performance can be gained by e Folder Connector and Job Management nrough multiple CPUs.

#### Storage Requirements

#### Component Requirement **Database Disk Space Requirements** 200 KB per successful job when logging in Info mode. (Data and Index) Unsuccessful jobs may retain additional information; the space requirements for this information is variable and may be up to 3-4x larger, depending on log level settings. The following formula may be used to determine the minimum disk space required relative to the time elapsed between database clean-up procedures: 200 KB \* Average Number of Active Jobs in the Adlib System = Estimated Database Growth Per Day Adlib PDF contains a Database Growth Management feature that purges certain database tables according to parameters such as database size or age of the records, depending on the type of database being utilized. For more information see the **Database Growth Management Appendix.** Runtime File Share Disk Space The shared file system used for processing documents should Requirements have enough disk space to store all active documents and their renditions (plus a buffer for queued documents) for all Adlib Servers installed.

This formula is recommended:

Average Document File Size \* 2.5 \* Average Number of Jobs in the Adlib System = Estimated Minimum Disk Space for the file share

For example, if the average document file size is 10 MB, and the average queue length is 100 jobs:

10 MB \* 2.5 \* 100 documents in system = 2.5 GB minimum disk space



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After a job has been processed by Adlib PDF, the documents can be automatically deleted from the shared file system.

#### Runtime Adlib Server Disk Space Requirements

Each Adlib Server requires enough disk space to handle the largest document and its rendition

#### Software Requirements

The following software prerequisites are required for all installations, regardless of the Services mode chosen (IIS-based or Self-hosted). For IIS-based Services installations, please refer to <a href="Software">Software</a> Requirements - Additional Requirements for IIS-Based Services.

#### For Windows Server 2008 R2 / 2012

Component	Requirement
CAD File Type Conversions	For CAD files generated by Autodesk Inventor:
	Autodesk Inventor View 2011/2012 must be installed prior to the Transformation Engine to support the rendering of these files when the ConvertToPdf.Cad setting has been configured under the Transformation Rules.
	The Adlib CAD module is incompatible with the Informative Graphics Brava application. CAD conversions will fail in Adlib if Brava is being run on the same machine.
Licensed Fonts	Proper licenses must be obtained in order for the Transformation Engine to embed licensed fonts within PDF output.
Microsoft .NET Framework	.NET Framework 3.5
	.NET Framework 4
	.NET Framework 4.5 (Windows Server 2012 only)
Microsoft Internet Explorer	Microsoft Internet Explorer 7.0 / 8.0 / 9.0 (32-bit)
	Internet Explorer 9.0 (32-bit) is supported for Windows Server 2008 R2 only. Internet Explorer 7.0 is included by default on Windows Server 2008 R2.
Microsoft Silverlight	Microsoft Silverlight 4.0 (or greater)
Microsoft Office 2007/2010 and/or Microsoft Office Compatibility Pack	System Manager requires MS Office and/or Office Compatibility Pack installed when utilizing processing rules that reference document properties for Office 2007/2010 file formats.
	Please see the Content Transformation Viewers and Supported File Types Appendix for information regarding the Microsoft Office applications that are supported with Adlib PDF.

Component	Requirement
Native Application Rendering	For Native Application rendering support, the proper licenses must be obtained.
	These applications must be registered in compliance with the licensing guidelines specified for each product.
	Your organization is responsible to ensure that these Native Applications use complies with the rights and licenses obtained.
	Any Configuration/Initialization dialogs need to be acknowledged within each application before the Transformation Engine can utilize them. For example, many applications have dialogs where users must provide personal information (Title, Name, Company, etc.) before using the application.
	Please see the Content Transformation Viewers and Supported File Types Appendix for information regarding the native applications that are supported with Adlib PDF.
Operating System	Windows Server 2008 R2 SP1 Windows Server 2012
	Support is currently available for only the English versions of Windows Server for use with Adlib PDF. Alternative language versions of these applications are not officially supported at this time.
User Account Control Settings	Turn off UAC for the user under which Adlib executables and services will be run.
Windows Print Spooler Services	Windows Print Spooler Services must be running in order for the Transformation Engine to render content.

Component	Requirement
XPS File Type Conversion	The XPS Viewer feature must be installed in order to use the ConvertToXps."*" Transformation Rule Settings to convert content to the XPS file type.
	Windows Server 2008:
	The Microsoft XML Paper Specifications Essentials Pack must be installed.
	If using MS Office 2007, the Save As XPS add-in must be installed, in addition to the XPS Viewer Feature.
	Windows Server 2012:
	The XPS Viewer is bundled as a feature on 2012. To install this feature, open Server Manager, click Add Roles or Features and follow the wizard to install the XPS Viewer Feature.

#### For Windows Server 2012 (specific)

Component	Requirement
Internet Explorer Security Settings	IE Enhanced Security Configuration must be disabled in order to view the Adlib Management Console once installation is complete.
	<i>₫</i>
	This prerequisite is required for Self-hosted Services installations only.
Remote Desktop Settings	If Adlib PDF is to be accessed by a user other than the local Administrator, the Windows Server 2012 default Remote Desktop setting must be changed to "Allow connections from computers running any version of Remote Desktop".
	For more information on this procedure or the Adlib PDF workaround, please see <u>Granting Access for Users without Local Administrator Rights (Windows Server 2012 Only)</u>

#### Database

Component	Requirement
Database	Microsoft SQL Server 2005
	Microsoft SQL Server 2008
	Microsoft SQL Server 2008 R2
	If using WIndows Server 2012, Service Pack 3 (SP3) must be installed with SQL Server 2008 R2.
	Microsoft SQL Server 2012
	Microsoft SQL Express 2008 can be installed with Adlib PDF if desired.
Microsoft SQL Server 2005	Named Pipes must be enabled.
Tablespace/schema and User Account	A database tablespace/schema with a corresponding user account must be created prior to an Adlib PDF Enterprise installation.
	When creating the database, the following options must be used explicitly:
	CREATE DATABASE [ADLIB_CTP OTHER_NAME] COLLATE SQL_Latin1_General_CP1_CI_AI where:
	Latin1_General = Default ordering for sorts
	CP1 = code page 1252 for non-Unicode data
	(Note: All Adlib string data types are Unicode) CI = case insensitive
	AI = accent insensitive

### Software Requirements - Additional Requirements for IIS-Based Services

#### For Windows Server 2008 R2 (specific)

Component	Requirement
Microsoft .NET 3.5.1 Framework	Features Required:  HTTP Activation  HTTP Activation is located within the .NET Framework 3.5.1  WCF Activation Group.

Component	Requirement
Web Server IIS	Management Tools
	IIS 6 Management Compatibility
	IIS 7.5 must be enabled
	<i></i>
	IIS 7.5 is included ( <i>but not enabled</i> ) by default on Windows Server 2008 R2.
	Common HTTP Features
	WebDAV 7.5 Publishing (IIS Web Publishing Extension Module)
	Web Server
	Application Development
	ASP.NET
	Security
	Windows Authentication

#### For Windows Server 2012 (specific)

Component	Requirement
Microsoft .NET 3.5 Framework	Features Required:  • HTTP Activation  .NET 3.5 Framework is included (but not enabled) by default on Windows Server 2012.
Microsoft .NET 4.5 Framework	Features Required: ASP.NET 4.5  WCF Services HTTP Activation
Web Server IIS	Management Tools  IIS 6 Management Compatibility  IIS Management Scripts and Tools  Common HTTP Features  WebDAV Publishing  Web Server  Application Development  ASP.NET 3.5  ASP.NET 4.5  Security  Windows Authentication  Application Server  COM + Network Access

### **System Requirements by Component**

When performing a custom installation, ensure that the following prerequisites are available according to the Adlib PDF Component being installed on the system.

#### **Database**

#### **Hardware Requirements**

Component	Requirement
Processor Speed	The hardware required to accommodate the desired operating
Memory (RAM)	size of the database.

Storage Requirements	
Component	Requirement
Database Disk Space Requirements (Data and Index)	200 KB per successful job when logging in Info mode.
	/*i
	Unsuccessful jobs may retain additional information; the space requirements for this information is variable and may be up to 3-4x larger, depending on log level settings.
	The following formula may be used to determine the minimum disk space required relative to the time elapsed between database clean-up procedures:
	200 KB * Average Number of Active Jobs in the Adlib System = Estimated Database Growth Per Day
	/ <b>*</b>
	Adlib PDF contains a Database Growth Management feature that purges certain database tables according to parameters such as database size or age of the records, depending on the

type of database being utilized. For more information see the

**Database Growth Management Appendix.** 

### **Software Requirements**

Component	Requirement
Database	Microsoft SQL Server 2005
	Microsoft SQL Server 2008
	Microsoft SQL Server 2008 R2
	If using WIndows 2012, Service Pack 3 (SP3) must be installed with SQL Server 2008 R2.
	Microsoft SQL Server 2012
Microsoft SQL Server 2005	Named Pipes must be enabled.
Microsoft .NET Framework	.NET Framework 3.5
Tablespace/schema and User Account	A database tablespace/schema with a corresponding user account must be created prior to an Adlib PDF Enterprise installation.
	When creating the database, the following options must be used explicitly:
	CREATE DATABASE [ADLIB_CTP OTHER_NAME] COLLATE SQL_Latin1_General_CP1_CI_AI where:
	Latin1_General = Default ordering for sorts
	CP1 = code page 1252 for non-Unicode data
	(Note: All Adlib string data types are Unicode)
	CI = case insensitive
	AI = accent insensitive

### **Services**

#### **Hardware Requirements**

Component	Requirement
Processor Speed	Minimum: The hardware required to run the Operating System
Memory (RAM)	on the machine.
Hard Disk Space	Recommended: Increased performance can be gained by launching multiple Job Management Service threads through multiple CPUs.

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#### Software Requirements

The software requirements for the Services Components vary dependant on whether IIS-based or self-hosted Services are to be installed on the system.

#### **IIS-Based Services Requirements**

#### For Windows Server 2008 R2 (specific)

Component	Requirement
Microsoft .NET 3.5.1 Framework	Features Required:  HTTP Activation  HTTP Activation is located within the .NET Framework 3.5.1 WCF Activation Group.
Web Server IIS	Management Tools  IIS 6 Management Compatibility  IIS 7.5 must be enabled  IIS 7.5 is included (but not enabled) by default on Windows Server 2008 R2.  Common HTTP Features  WebDAV 7.5 Publishing (IIS Web Publishing Extension Module) Web Server  Application Development  ASP.NET  Security

#### For Windows Server 2012 (specific)

Component	Requirement
Microsoft .NET 3.5 Framework	Features Required:  HTTP Activation  NET 3.5 Framework is included (but not enabled) by default on Windows Server 2012.
Microsoft .NET 4.5 Framework	Features Required: ASP.NET 4.5  WCF Services  HTTP Activation

Component	Requirement
Web Server IIS	Management Tools  IIS 6 Management Compatibility  IIS Management Scripts and Tools  Common HTTP Features  WebDAV Publishing  Web Server  Application Development  ASP.NET 3.5  ASP.NET 4.5  Security  Windows Authentication
Internet Explorer Security Settings	IE Enhanced Security Configuration must be disabled in order to view the Adlib Management Console once installation is complete.
Remote Desktop Settings	If Adlib PDF is to be accessed by a user other than the local Administrator, the Windows 2012 default Remote Desktop setting must be changed to "Allow connections from computers running any version of Remote Desktop".
	For more information on this procedure or the Adlib PDF workaround, please see <u>Granting Access for Users without Local Administrator Rights (Windows Server 2012 Only)</u>

#### Web Browser User Interface

Component	Requirement
Microsoft Internet Explorer	Microsoft Internet Explorer 7.0 / 8.0 / 9.0 (32-bit mode)
	Internet Explorer 9.0 (32-bit) is supported for Windows Server 2008 R2 only. Internet Explorer 7.0 is included by default on Windows Server 2008 R2.
Microsoft Silverlight	Microsoft Silverlight 4.0 (or greater)

### **Self-Hosted Services Requirements**

#### For Windows Server 2008 R2 / 2012

Component	Requirement
Microsoft .NET Framework	.NET Framework 3.5
	.NET Framework 4

Component	Requirement
User Account Control Settings	Turn off UAC for the user under which Adlib executables and services will be run.

#### For Windows Server 2012 (specific) Self-Hosted Services only

Component	Requirement
Internet Explorer Security Settings	IE Enhanced Security Configuration must be disabled in order to view the Adlib Management Console once installation is complete.
Remote Desktop Settings	If Adlib PDF is to be accessed by a user other than the local Administrator, the Windows 2012 default Remote Desktop setting must be changed to "Allow connections from computers running any version of Remote Desktop".
	For more information on this procedure or the Adlib PDF workaround, please see <u>Granting Access for Users without Local Administrator Rights (Windows Server 2012 Only)</u>

#### Web Browser User Interface

Component	Requirement
Microsoft Internet Explorer	Microsoft Internet Explorer 7.0 / 8.0 / 9.0 (32-bit mode)  Internet Explorer 9.0 (32-bit) is supported for Windows Server 2008 R2 only. Internet Explorer 7.0 is included by default on Windows Server 2008 R2.
Microsoft Silverlight	Microsoft Silverlight 4.0 (or greater)

## **System Manager**

### **Hardware Requirements**

Component	Requirement
Processor Speed	See General Requirements Section.
Memory (RAM)	See General Requirements Section.
Network	See General Requirements Section.
Hard Disk Space	Minimum: 1 GB

### **Software Requirements**

Component	Requirement
Microsoft Office 2007/2010 and/or Microsoft Office Compatibility Pack	System Manager requires MS Office and/or Office Compatibility Pack installed when utilizing processing rules that reference document properties for Office 2007/2010 file formats.
	Please see the Content Transformation Viewers and Supported File Types Appendix for information regarding the Microsoft Office applications that are supported with Adlib PDF.
Microsoft .NET Framework	.NET Framework 3.5
User Account Control Settings	Turn off UAC for the user under which Adlib executables and services will be run.

## **Transformation Engine**

## Hardware Requirements

Component	Requirement
Processor Speed	see General Requirements Section
Memory (RAM)	Additional RAM should be added if processing large files or if running resource intensive applications in parallel with the Transformation Engine
Hard Disk Space	see General Requirements Section

#### **Storage Requirements**

Component	Requirement
Disk Space Requirements	Minimum: 1 GB
Runtime File Share Disk Space Requirements	The shared file system used for processing documents should have enough disk space to store all active documents and their renditions (plus a buffer for queued documents) for all Adlib Servers installed.
	This formula is recommended: Average Document File Size * 2.5 * Average Number of Jobs in the Adlib System = Estimated Minimum Disk Space for the file share
	For example, if the average document file size is 10 MB, and the average queue length is 100 jobs:
	10 MB * 2.5 * 100 documents in system = 2.5 GB minimum disk space
	After a job has been processed by Adlib, the documents can be automatically deleted from the shared file system.
Runtime Adlib Server Disk Space Requirements	Each Adlib Server requires enough disk space to handle the largest document and its rendition

### **Software Requirements**

Component	Requirement
Microsoft Internet Explorer	Microsoft Internet Explorer 7.0 / 8.0 / 9.0 (32-bit)
	Internet Explorer 9.0 (32-bit) is supported for Windows Server 2008 R2 only. Internet Explorer 7.0 is included by default on Windows Server 2008 R2.
Native Application Rendering	For Native Application rendering support, the proper licenses must be obtained.
	These applications must be registered in compliance with the licensing guidelines specified for each product.
	Your organization is responsible to ensure that these Native Applications use complies with the rights and licenses obtained
	Any Configuration/Initialization dialogs need to be acknowledged within each application before the Transformation Engine can utilize them. For example, many applications have dialogs where users must provide personal information (Title, Name, Company, etc.) before using the application.
	Please see the Content Transformation Viewers and Supported File Types Appendix for information regarding the native applications that are supported with Adlib PDF.
Licensed Fonts	Proper licenses must be obtained in order for the Transformation Engine to embed licensed fonts within PDF output.
CAD File Type Conversions	For CAD files generated by Autodesk Inventor:
	Autodesk Inventor View 2011/2012 must be installed on the system prior to the installation of the Transformation Engine Component if these file types will be rendered.
	The Adlib CAD module is incompatible with the Informative Graphics Brava application. CAD conversions will fail in Adlib if Brava is being run on the same machine.
Microsoft .NET Framework	.NET Framework 3.5 .NET Framework 4
User Account Control Settings	Turn off UAC for the user under which Adlib executables and services will be run.
Windows Print Spooler Services	Windows Print Spooler Services must be running in order for the Transformation Engine to render content.

## Installation Instructions

#### **Overview**

Adlib PDF, including all the associated components, can be installed on a single server by performing a Complete Installation. Using a Custom installation, the user can install selected components on multiple servers. For more information on configuring a multi-server deployment of Adlib PDF, Contact Adlib.

#### Prepare for Initial Installation

To install Adlib PDF you must be logged into the system with an account that has Local Administrator rights.



After installation is complete, a configuration change is required If users without local Administrator rights are to be granted access to the system. Please see <u>Granting Access for Users without Local Administrator Rights (Windows Server 2012 Only)</u> for more information on this procedure. Note: this applies to Windows Server 2012 users only.

Ensure that the necessary system requirements are available, including a database tablespace/schema with a corresponding user account. (See <a href="System Requirements">System Requirements</a> for more details on installation prerequisites and the database creation options that are required).

#### **SQL Server Setup**

- Create a new SQL Server database named ADLIB\_PDF (or a preferred naming convention).
   This database must NOT be case sensitive.
- 2. Create an SQL user and ensure this user has database access to the newly created database.
- 3. Document the name of the SQL server including Instance name, SQL user credentials and database name for use during the Adlib software install.

#### **Domain Controllers**

- 1. SQL Server Express cannot be installed by Adlib PDF on a domain controller because of a database service account conflict.
- In order for a SQL Server Express database is to be used, it must be installed manually before
  the installation of Adlib PDF and an alternate account must be used as the SQL Server service
  account. This account cannot be a local service or network service account.

#### **Using Windows Authentication for SQL Server**

- 1. If desired, Windows authentication for SQL Server can be used by selecting a checkbox on the SQL Server Database Settings window during the Adlib PDF installation procedure. Before beginning, the user that will be performing the installation must be added to the list of users in the database and given sysadmin privileges:
  - a) Instance -> Security -> Logins -> Right-click New Login or Edit Existing.

- b) Server Roles -> Click Sysadmin
- 2. Repeat the steps above to give sysadmin privileges to NT\_AUTHORITY\SYSTEM and NT\_AUTHORITY\NETWORK SERVICE.
- 3. If Adlib PDF will be installed across multiple servers, the remote machines must also be added to the list of users with sysadmin privileges. An example of the query is as follows:

CREATE LOGIN [ADLIBSYS\[MACHINE\_NAME\_REPLACE] \$] FROM WINDOWS

EXEC sp\_addsrvrolemember 'ADLIBSYS\[MACHINE\_NAME\_REPLACE] \$', 'sysadmin'; GO

#### **Adlib Active Directory Service Account User**

- 1. Create an account in the Active Directory that will be dedicated as the ADLIB service account used during the Adlib PDF install.
- Ensure this account has access to any remote shares if the Folder Connector Component will be installed.
- 3. Ensure that this account is a local administrator for any virtual image servers dedicating to Adlib.

#### **Install the Necessary Prerequisites**

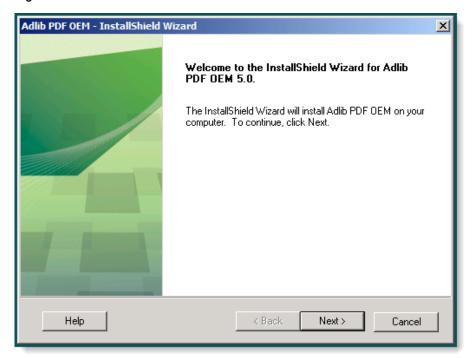
- 1. Ensure that Windows UAC is turned off for the install.
- If IIS-based Services will be installed, ensure that IIS is installed and that WebDAV IIS
  compatibility is enabled. If self-hosted Services will be installed, this requirement is not
  necessary.
- Ensure that RDP is enabled on the server. For Windows Server 2012 users, if Adlib PDF is to be accessed by a user other than the local Administrator, the Windows default Remote Desktop setting must be changed to "Allow connections from computers running any version of Remote Desktop" For more information on this procedure, or the Adlib PDF workaround for this issue, please see <u>Granting Access for Users without Local Administrator Rights (Windows Server 2012 Only)</u>.
- 4. Ensure that .NET 3.5 is installed via Server Manager and that HTTP Activation is turned on (HTTP Activation is only required if IIS-based Services will be installed).
- 5. Download and install .NET 4.0, if necessary. Windows Server 2012 also require .NET 4.5.
- 6. Review the <u>System Requirements</u> chapter for any additional prerequisites required for the Components that will be installed.

#### **Installation Instructions**

#### **↓** To Install Adlib PDF:

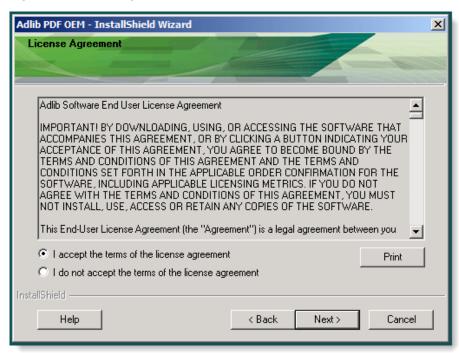
- 1. Close all applications.
- 2. Run the Adlib PDF 32- or 64-bit installation file.
- 3. In the Adlib-Installation Wizard window, click Next.

Figure 1 - Adlib-Installation Wizard



4. In the License Agreement window, accept the End-User License Agreement terms.

Figure 2 - License Agreement Window



In the Customer Information window, type the Username and Company Name and click Next.

Figure 3 - Customer Information Window

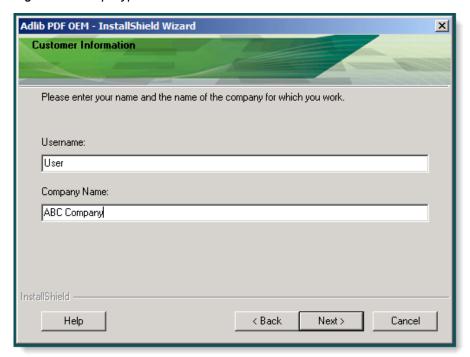


6. In the *Setup Type* window, select **Complete** to begin a complete installation of all components of the Adlib system.

Or,

- 7. Select **Custom** to begin an installation of the components of your choice.
- 8. If desired, click **Browse...** and select an alternate **Installation Folder** for the installation.
- 9. Click Next.

Figure 4 - Setup Type Window



The specified installation folder will be checked to ensure that the user NETWORK SERVICE has the required permissions to allow IIS to access the web.config in the install folder. If the proper permissions have not been set, a pop-up dialog will provide the following options:

**Yes**: The install will attempt to change the permissions. If it fails to set permissions, the installation will fail. If successful, the install will continue.

**No**: The install will not attempt to change permissions if not set. The user will be prompted to select a different installation path.

**Ignore**: The installer will check for permissions, and note in install log if required permissions are not set. The installation will continue.



If any system prerequisites are not available, a pop-up window will be displayed listing the missing requirements.

10. If a Custom installation was specified, select the components you wish to install in the Select Features window. The disk space required/available for the selected components will be displayed. The following options are available: **Database Scripts**: The scripts and support files required to create the Adlib System Database.

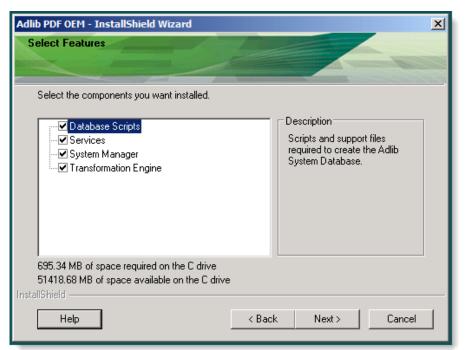
**Services**: The Job Management Service.

**System Manager**: The component that manages jobs and monitors all Adlib System components. System Manager also prepares each job by executing the appropriate rule sets and issues alerts to the system administrator.

**Transformation Engine**: The component that performs file transformations.

For further instructions on a Custom installation, please refer to the steps below that are applicable to the components you wish to install. During a Complete installation several system defaults are created that must be replicated manually after a Custom installation before Adlib PDF will be operational. For a description of these procedures, see <a href="Manual System Configurations">Manual System Configurations</a>.

Figure 5 - Select Features Window





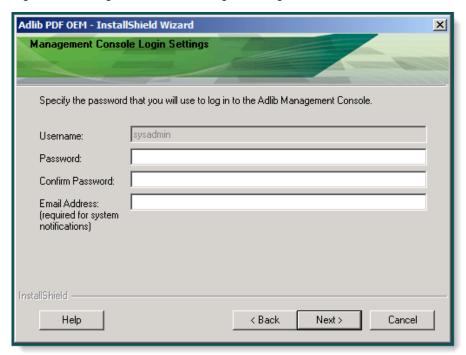
The Adlib **Database Scripts Component,** which registers a schema to the database platform, must be installed only once even if other components are installed on multiple servers.

- 11. In the *Management Console Login Settings* window, type the **Password** to be associated with the sysadmin **Username**. These credentials will be used to register Components rather than to login to the Adlib Management Console.
- 12. Enter the **Email Address** at which you wish to receive system notifications and click **Next**. Note: Email notification is not available with Adlib PDF OEM.



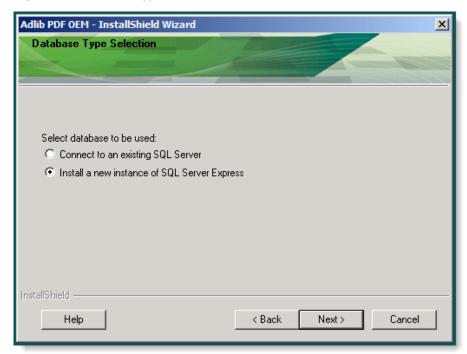
The **Username** for these administrator-level credentials is predefined as "sysadmin".

Figure 6 - Management Console Login Settings



13. Select either Connect to an existing SQL Server or Install a new instance of SQL Express in the *Database Type Selection* window.

Figure 7 - Database Type Selection Window



14. If **Connect to an existing SQL Server** was selected, enter or modify the default values for the following fields in the *SQL Server Database Settings* window and click **Next**:

Database Name: Any alias for the name of the database to be used by Adlib PDF.

**Server Name**: The machine name where the database is located. This must be an externally visible/resolvable name.

**Username/Password**: The credentials of a database user with read/write privileges. These credentials will be used to register components and to make calls to the database.

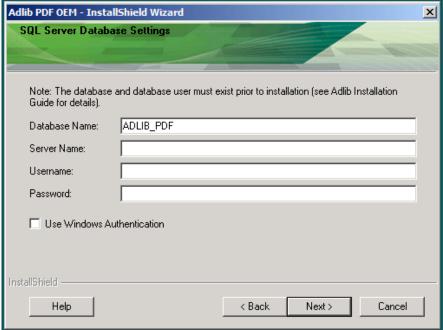
**Use Windows Authentication**: Check the box to set the authentication for SQL Server to Windows Authentication. The user performing the installation, as well as the NT\_AUTHORITY\SYSTEM and NT\_AUTHORITY\NETWORK SERVICE must have sysadmin privileges in the database. For more information, see <u>Using Windows Authentication for SQL Server</u>.



When performing an Adlib PDF for SQL Server installation, the database tablespace/schema with a corresponding user account must be available prior to the installation of the Adlib system.

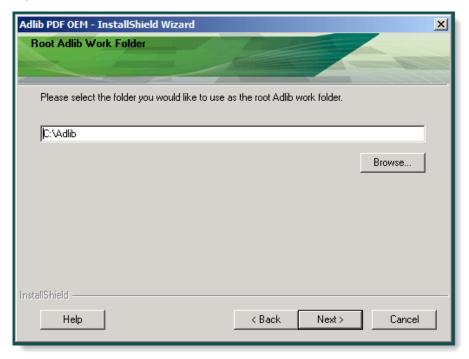
The information provided in the *Database Settings* window will be used to verify a connection to the database before the remainder of the installation can proceed.

Figure 8 - SQL Server Database Settings Window



15. If desired, modify the default path in the *Root Adlib Work Folder* window. This is the location where the working folders will be created as necessary for the components being installed.

Figure 9 - Root Adlib Work Folder



16. In the *Windows Credentials* window, type the **Account** and **Password** under which the Adlib executables and services will run. These must be the credentials of a Windows user with local administrator privileges. The **Account** name must be in the local admin\username or domain\username format. For example:

Local admin\username format: .\Administrator Domain\username format: mydomain\adlibuser



User Account Control security settings must be turned off for this Windows user before the installation of Adlib PDF.

Figure 10 - Windows Credentials Window



17. Two options are available in the Service Settings window, depending on the Services mode chosen by the user. If the web Services and Job Management Service are to be self-hosted, select the Self-Hosted Service Mode radio button and enter or modify the default values for the following fields:

**Services/Job Management Service Port Numbers:** The port numbers to be used by the web Services and Job Management Service to access Adlib PDF. Defaults are provided during installation, but these can be modified if necessary. The port numbers will be validated before the next step in the installation.

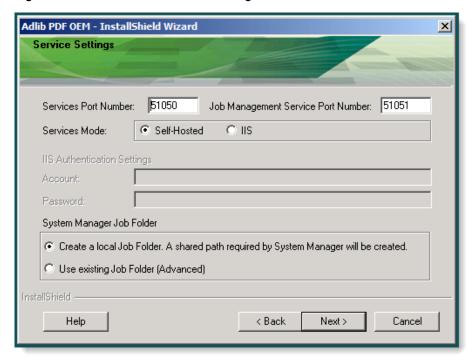
**Create a local Job Folder:** A shared path will be created for use by the System Manager. Or,

Use Existing Job Folder: Select this option if you are configuring a clustered environment.



If IIS is not detected on the machine on which Adlib PDF is being installed, the choice to use the IIS Services Mode will not be enabled. Also, if Adlib PDF Services are installed on multiple servers, only one type of Services Mode can be utilized across the system.

Figure 11 - Self-Hosted Services Settings



OR, if the web Services and Job Management Services are to be hosted by IIS, select the **IIS Services Mode** radio button and complete the following fields:

**IIS Port Number**: The port number for the user console connection to the Adlib website.

**IIS Authentication Settings Account/Password**: The credentials of a user with the right to create Internet Information Services Settings, using the domain\username format.

**Create a local Job Folder:** An IIS virtual directory and a shared path will be created for use by the System Manager.

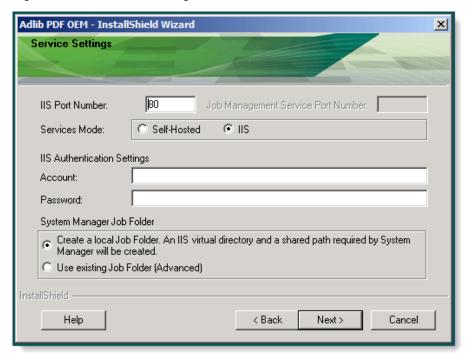
Or,

Use Existing Job Folder: Select this option if you are configuring a clustered environment.



If the **Use Existing Job Folder** option is selected, the File Repository UNC Path and File Repository Web Server Path must be specified in the Job Management Service System Settings, using the Adlib Management Console. For more information on modifying System Settings, see the Adlib PDF User Guide.

Figure 12 - IIS Service Settings Window



18. During a custom installation, if a **Transformation Engine** Component is being installed on an alternate server, additional information is required in order for that server to access the **Services** Components:

In the *Management Console Login Settings* window, enter the **Password** created for the SA Username and select the appropriate **Services Mode**.

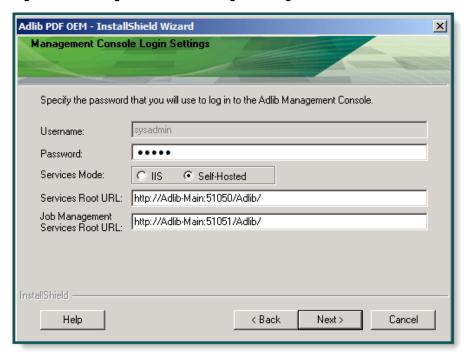
**Services/Job Management Service Root URLs:** To enable the **Services** Components to connect to the main Adlib PDF installation, the full URLs must be specified with the main Adlib PDF server name and the web and Job Management Services port numbers in the following manner:

http://<server\_name>:port number/Adlib/



The Job Management Service Root URL is required for a Self-Hosted Services installation only.

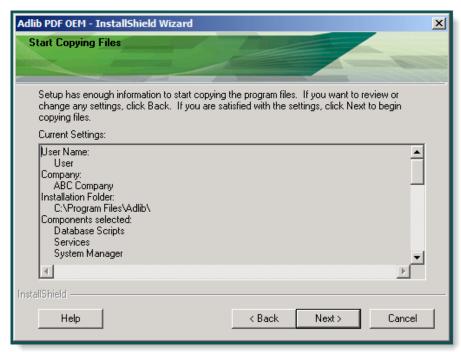
Figure 13 - Management Console Login Settings Window



19. In the *Start Copying Files* window, review the list of components that will be installed. If any changes are required, click **Back** to make changes.

20. Click **Next** to begin copying the program files. The software will install using the settings defined during the installation process.

Figure 14 - Start Copying Files Window



21. In the *InstallShield Wizard Complete* window, select the appropriate checkbox if you wish to view the Installation Log and or launch the License Manager and click **Finish**.

The Installation Log is stored in the following location:

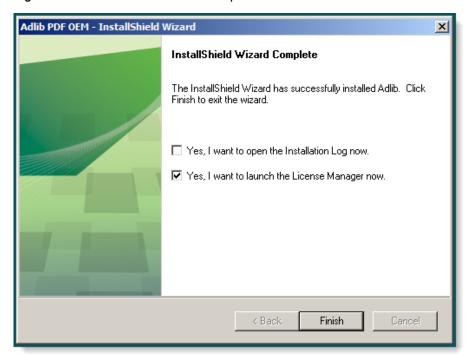
C:\Users\<USERNAME>\AppData\Local\Temp\1

For more information on activating a license for Adlib PDF, see <u>License Manager Instructions</u>.



The License Manager link will appear only when a Complete installation has been performed, or when the Transformation Engine has been installed.

Figure 15 - InstallShield Wizard Complete Window





The Transformation Engine must be activated in either evaluation mode or with a license key before jobs can be processed.

Once Adlib PDF has been licensed, the **Process Manager Service** must be started (on each server in a multi-server installation) using Windows Services before the **Transformation Engine** will be operational.

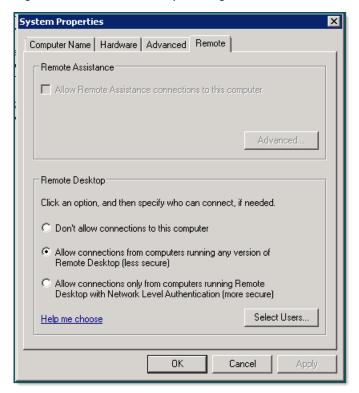
# Granting Access for Users without Local Administrator Rights (Windows Server 2012 Only)

In order to grant access to Adlib PDF to users without local Administrator rights, the default Remote Desktop settings must be changed to allow this type of connection.

### **♦** Modify System Properties within Windows Server 2012:

- 1. Access the Control Panel and open System Properties.
- 2. Click the Remote tab.
- 3. Select Allow connections from computers running any version of Remote Desktop (less secure) and click Apply.

Figure 16 - Remote Desktop Settings



# Silent Installation

# **Overview**

Adlib PDF can be configured to install silently, without the need for user intervention.

An interactive installation receives the necessary input from the user in the form of responses to dialog boxes. A silent installation receives user input from an Adlib PDF Installation Configuration file (AdlibInstall.cfg).

The installation configuration file contains information that an end user would ordinarily enter as responses to within the Wizard when running an installation from the user interface. The format of AdlibInstall.cfg resembles that of an .ini file. The installation configuration file is a plain text file consisting of sections containing installation parameters for each Component. The user must specify YES or NO for the "Install" parameter within each section and enter any additional information for each Component to be installed.

For example: [Engine]

Install = Yes

ActivationID = < Customer License ID>

To install Adlib PDF silently, the user executes the installation with an "/s" command line parameter (i.e. Adlib.5.0x64.exe /s). The installation will search for the AdlibInstall.cfg in the same folder as the installation file. Optionally, the user can specify a different location for the installation configuration file by passing the path as a second parameter (i.e. Adlib.5.0x64.exe /s C:\User\SomePath\AdlibInstall.cfg). The installation configuration file must always be named "AdlibInstall.cfg". The silent installation will read the information from the installation configuration file and install the product according to the data provided. To modify the installation configuration file, simply open it in a text editor.

The user will not be notified when the installation process is completed, but the executable will be visible within the Windows Task Manager while it is running.

The silent installation will not force a reboot, however it is recommended that the user reboot after the installation has completed.

### Installation Log

The Installation Log is stored in the following location:

C:\Users\<USERNAME>\AppData\Local\Temp\1

# **Process Manager Services**

The Adlib **Process Manager** Service must be started in Windows (Administrative Tools/Services) before jobs can be submitted for processing.

### **Databases**

Adlib PDF can be installed for use with an existing SQL database. If an SQL database is to be used, the database tablespace/schema with a corresponding user account must be available prior to the installation of Adlib PDF. If a SQL database is not already installed, a SQL Express Instance and database can be created during the Adlib PDF installation. To install a SQL Express database, uncomment and complete the parameters that pertain to the SQL Express installation within the silent installation file:

InstallSQLServerExpress = Yes

SQLServerExpressSAPassword = <SQL Password for SA>

### Multi-Server Installations

When Adlib PDF Components are to be installed on multiple servers, the silent installation file must be modified for each installation, and a defined order of Component installation must be followed.

### **◆** To Install Adlib PDF Components on Multiple Servers:

- 1. Install the database scripts or SQL Server Express database. For all subsequent installations, specify "Install = No" within the Database/Scripts sections.
- 2. Install the Services Component(s). If installing a Services Component on a machine that does not contain the database, ensure that the "RemoteDatabaseConnectionString" parameter is included in the silent installation file.
- 3. Install the System Manager and Engine and any additional Components as required. Any Component installations on servers where the Services Component has not been installed requires the "RemoteServicesURL(s)" location to be specified within the silent installation file. This location should be a fully qualified domain name when performing an install in a distributed system.

### Uninstallation

Similarly to installation, the silent uninstallation file (AdlibUninstall.cfg) contains information that the user would ordinarily enter as responses within the wizard when running an uninstall from the user interface. To begin the silent uninstall, the user executes the installation with an "/s" command line parameter, (i.e. Adlib.5.0x64.exe /s). The program will search for the .cfg in the same folder as the installation file. If present, the silent installation file (AdlibInstall.cfg) must be removed from the folder before performing the uninstall, or a silent installation will be executed. Optionally, the user can specify a different location for the uninstallation configuration file by passing the path as a second parameter:

Adlib.5.0x64.exe /s C:\User\SomePath\AdlibUnInstall.cfg.



The silent uninstallation configuration file will perform a complete uninstall. Currently, modifications cannot be performed silently.

# AdlibInstall.cfg

[Common]

InstallFolder = C:\Program Files\Adlib

RootFolder = C:\Adlib

WindowsUsername = <Windows Login>

WindowsPassword = <Windows Password>

ManagementConsoleUsername = sysadmin

ManagementConsolePassword = <sysadmin password>

SysadminEmailAddress = <myemail@mydomain.com>

ChangeNetworkServicePermission = Yes I No I Ignore

CustomerName = <MyName>

CompanyName = <MyCompany>

#DatabaseConnectionString = Data Source = <[Computer\_Name] | [Computer\_Name]\DB Instance Name>; Initial Catalog = <DatabaseName>; User Id = <DatabaseAccountUserID>; Password = <DatabaseAccountPassword>;

#RemoteDatabaseEngine = System.Data.SqlClient

#RemoteServicesURL = http://<HOSTNAME>:<Port>/Adlib

#RemoteJMSServicesURL = http://<HOSTNAME>:<Port>/Adlib

[Database]

Install = Yes | No

DatabaseEngine = SQLServer

DatabaseAccount = AccountName

DatabasePassword = <SQL Password>

# SQLServer-specific

ServerName = localhost\SQLEXPRESS

SQLServerAuthentication = SQLServer | Windows

DatabaseName = ADLIB\_PDF

# Uncomment next two lines to install SQL Express

#InstallSQLServerExpress = Yes | No

#SQLServerExpressSAPassword = <SQL Password for SA>

[SystemManager]

Install = Yes | No

ServiceAccount = <Windows Login for SystemManager>

ServicePassword = <Windows Password>

[Engine]

Install = Yes | No

ActivationID = <Customer license ID>

## [Services]

Install = Yes | No

Mode = SelfHosted | IIS

PortNumber = <Selfhosted\_Default=51050 | IIS\_Default=80>

JMSPortNumber = 51051

DirectorJobFolder = Create

IISAuthenticationAccount = <Windows Login for Services>

IISAuthenticationPassword = <Windows Password>

## [GenericConnector]

InstallPath = C:\Program Files\Adlib\Generic Connector

InstallVersion = 1.0.0.0

# AdlibUninstall.cfg

ManagementConsoleUsername = sysadmin

ManagementConsolePassword = <PASSWORD>

RehostEngineLicenses = Yes | No

# Glossary

Silent Install Script Parameter	Description
[Common]	
InstallFolder	Specify the install location.  Default = C:\Program Files\Adlib
RootFolder	Specify the location to create the default processing folders.  Default = C:\Adlib
WindowsUsername/Password	Enter the username and password under which the Adlib executables and services will run. These must be the credentials of a Windows user with local administrator privileges. The username must be in the domain\username format or the .\username format for a local user.
	User Account Control security settings must be turned off for this Windows user before the installation of Adlib PDF
ManagementConsoleUsername	The username is pre-defined as "sysadmin".
ManagementConsolePassword	Enter the password you wish to use to login to the Adlib Management Console.
SysadminEmailAddress	Enter the email address at which you wish to receive system notifications.
ServicesURL	Specify the location of the Services installation in the following format:
	http://localhost/Adlib
	If a port number other than 80 will be used, the port number must also be specified:
	http://localhost: <portnumber>/Adlib</portnumber>
ChangeNetworkServicePermission	Specify whether or not the installer should check the installation folder to ensure that the user NETWORK SERVICE has the correct permissions so that IIS can access the web.config in the install folder.
	Yes - The install will attempt to change the permissions. If it fails to set permissions, the installation will fail. If successful, the install will continue.
	No - The install will not attempt to change permissions if not set. The installation will fail.
	Ignore - The installer will check for permissions, and note in install log if required permissions are not set. The installation will continue.
CustomerName	Specify the customer name.

Silent Install Script Parameter	Description
CompanyName	Specify the company name.
RemoteDatabaseConnectionString	When deploying additional Adlib PDF Components in a subsequent installation on a machine that does not contain the database, specify the following parameters within the RemoteDatabaseConnectionString:
	Data Source = Computer Name or Computer Name\Database Instance Name
	Initial Catalog = Database Name
	User ID = Database User Account Name
	Password = Database User Password
RemoteDatabaseEngine	Default = System.Data.SqlClient
RemoteServicesURL RemoteJMSServicesURL	If IIS-based Services have been installed, only the RemoteServicesURL (default port = 80) is required.
	If self-hosted Services have been installed, both the RemoteServicesURL (default port = 51050) and the RemoteJMSServicesURL (default port = 51051) are required.
	The Remote Services and JMS Services URLs must be a fully qualified domain names when Adlib PDF Components are installed on additional servers.
[Database]	
Install	Specify Yes when installing all the Adlib PDF Components on a single server. If Components will be installed on multiple servers, the database scripts must be installed first. During subsequent installations, the database install parameter must be:  Install = No
DatabaseEngine	Default = SQLServer
DatabaseAccount/Password	Specify the credentials of a database user with read/write privileges. These credentials will be used to register components and to make calls to the database.
	The Database Account/Password must also be entered during a SQL Express installation.
#SQLServer-specific	When performing an Adlib PDF for SQL Server installation, the database tablespace/schema with a corresponding user account must be available prior to the installation of the Adlib system

Silent Install Script Parameter	Description
ServerName	The machine name where the database is located. This must be an externally visible/resolvable name. <databasehost> or <databasehost>\<databaseinstance>  Default = localhost\SQLEXPRESS</databaseinstance></databasehost></databasehost>
SQLServerAuthentication	Select either SQLServer or Windows Authentication for the SQL Server database
DatabaseName	Any alias for the name of the database to be used by Adlib PDF.  Default = ADLIB_PDF
#InstallSQLServerExpress	Uncomment this parameter and specify Yes to install a SQL Server Express database along with Adlib PDF.
#SQLServerExpressSAPassword	Uncomment this parameter and specify the SA password for the SQL Express database. These credentials will be used to register components and to make calls to the database.
[SystemManager]	
Install	Specify whether or not to install the System Manager Component.
ServiceAccount/Password	The credentials of a local administrator account, which will be used to run the System Manager Service. If desired, this can be the same account specified for the WindowsUsername/ Password parameter in the Common section.
[Engine]	
Install	Specify whether or not to install the Transformation Engine.
ActivationID	The customer license ID.
[Services]	
Install	Specify whether or not to install Services. When installing Adlib PDF Components on additional servers, the Services Component must be installed after the Database, but before all subsequent Components. In those cases, the RemoteServicesURL(s) must be included in the .cfg file when installing Components on other servers.
Mode	Use Mode to select either IIS or Self-hosted. The port number parameter must be specified. If IIS services are selected, the JMSPortNumber will be ignored.

Silent Install Script Parameter	Description
PortNumber	Indicate the port number for the user console connection to the Adlib website.
	Default = 80 (IIS Services).
JMSPortNumber	Indicate the port number for Job Management Services (Self-hosted Services only).
	Default = 51051
DirectorJobFolder	The default "Create" will create an IIS virtual directory and a shared path for use by the System Manager.
IISAuthenticationAccount/Password	Specify the credentials of a user with the right to create Internet Information Services Settings, using the domain\username format.
[UserInterface]	
Install	The Management Console is not available with Adlib PDF OEM.
[GenericConnector]	
InstallPath	If applicable, specify the path to the location of the custom integration to Adlib PDF. The default is:
	C:\Program Files\Adlib\Generic Connector
InstallVersion	Indicate the version number of the custom connector used when registering the Component with Adlib PDF.

# **License Manager Instructions**

The Adlib License Manager can be used to manage all of your Adlib PDF license needs. Licenses can be activated, returned and rehosted according to business requirements.

# **Explanation of License Types**

There are four types of license transactions that can be performed within the Adlib License Manager:

License Type	Use	
Evaluation License	Enables Adlib PDF for a 30-day evaluation period. Evaluation may be enabled only once per computer. Output will be watermarked.	
Activate License	Activates an Adlib PDF license for exclusive use with all of the features that are included in the purchased license package.	
Rehost License	Temporarily returns a license to the Adlib license server so that it can be re-activated on a different machine.  Rehost can also be used to temporarily remove then return a license to the same machine when making any significant changes to a server (such as virtualizing a server or making any significant hardware changes.)	
Return License	Returns a license to the Adlib license server with no transfer.	



The **Transformation Engine** must be stopped using the **Process Manager** before performing any type of license transaction. For more details on stopping and restarting the service, see the Adlib PDF User Guide.

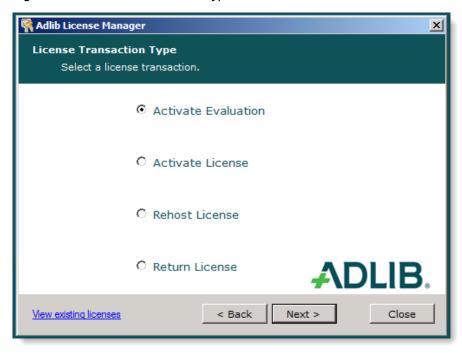
# **Evaluation License**

The Activate Evaluation license transaction enables Adlib PDF in evaluation mode for a 30-day trial period. Output will be watermarked.

### **♦** To Activate an Evaluation License:

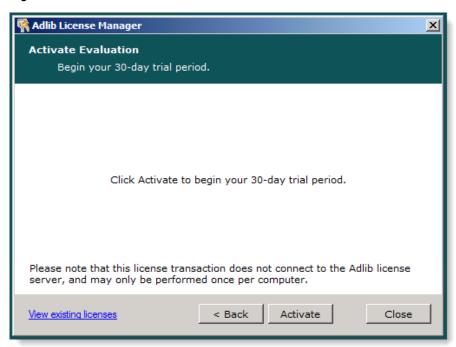
1. In the License Transaction Type window, select Activate Evaluation and click Next.

Figure 17 - License Transaction Type window



2. In the Activate Evaluation window, click Activate to begin the 30-day trial period.

Figure 18 - Activate Evaluation window



In the License Transaction Complete window, click Close to close the License Manager. The
 Transformation engine must now be restarted using the Process Manager service before
 jobs can be processed. For more information on stopping and starting the service, see the
 Adlib PDF User Guide.

Figure 19 - License Transaction Complete window



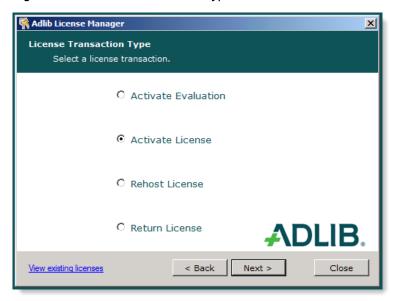
# **Activate License - Online**

The Activate License transaction type registers Adlib PDF with all of the features that are included in the purchased license package. Any feature that is outside of the purchased license package will produce evaluation watermarks when selected.

### **↓** To Activate a License Online:

1. In the License Transaction Type window, select Activate License and click Next.

Figure 20 - License Transaction Type window

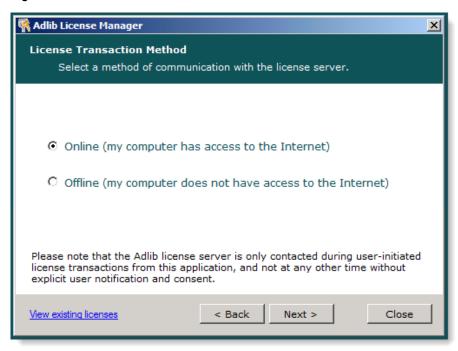




The Adlib License server is only contacted during user-initiated license transactions from the Adlib License Manager application, and not at any other time without explicit user notification and consent.

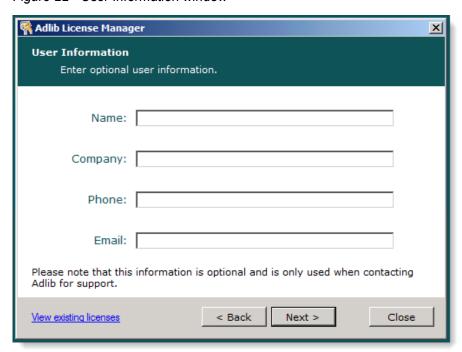
2. In the License Transaction Method window, select Online and click Next.

Figure 21 - License Transaction Method window



3. If desired, in the *User Information* window type the **Name**, **Company**, **Phone** and **Email** and click **Next**.

Figure 22 - User Information window

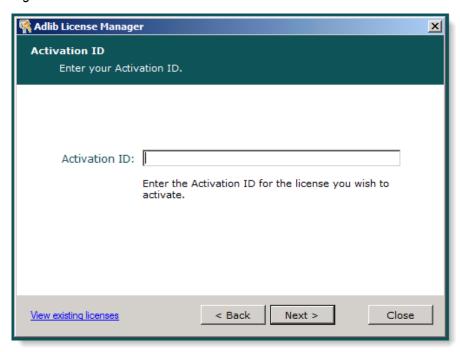




This information is only used when contacting Adlib for support.

4. In the *Activation ID* window, type the **Activation ID** provided by Adlib Fulfillment and click **Next**.

Figure 23 - Activation ID window

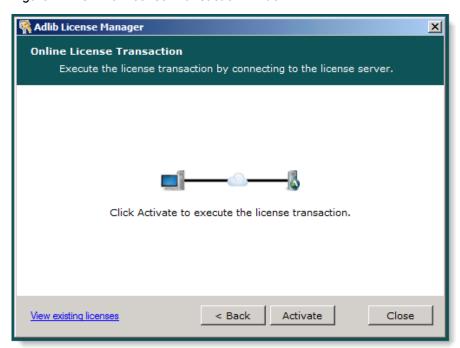


5. In the Online License Transaction window, click Activate to begin the activation.



The **Transformation Engine** must be stopped using the **Process Manager** before performing any type of license transaction. For more details on stopping and restarting the service, see the Adlib PDF User Guide.

Figure 24 - Online License Transaction window

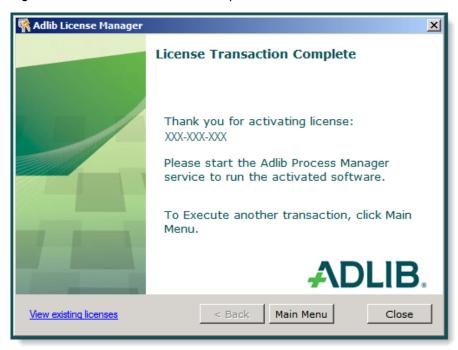




The Adlib **Transformation Engine** requires one license per virtual machine.

6. When the license has been activated, click **Finish** to return to the main menu of the Adlib License Manager or **Close** to exit the application. The **Transformation Engine** must now be restarted using the **Process Manager** service before jobs can be processed. For more information on stopping and starting the service, see the Adlib PDF User Guide.

Figure 25 - License Transaction Complete window



## **Activate License - Offline**

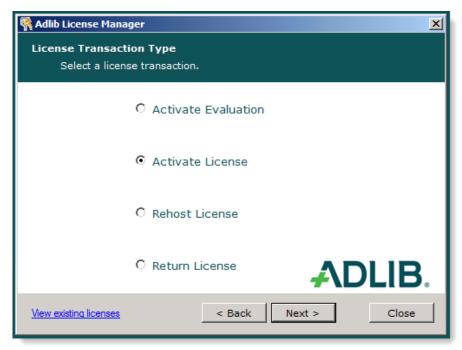
Licenses can be activated offline by generating an activation request file and transmitting it online to the Adlib license server on an alternate computer, or by email to Adlib customer service.

When Adlib PDF is licensed for the first time using the offline process, two response files must be requested and submitted; the first activation request file creates a license storage placeholder on the Transformation Engine server and the second provides the necessary information to complete the license transaction. Any subsequent activations require only one response file submission to the Adlib license server.

### **↓** To Activate a License Offline:

1. In the License Transaction Type window, select Activate License and click Next.

Figure 26 - License Transaction Type window



2. In the License Transaction Method window, select Offline and click Next.

Figure 27 - License Transaction Method window



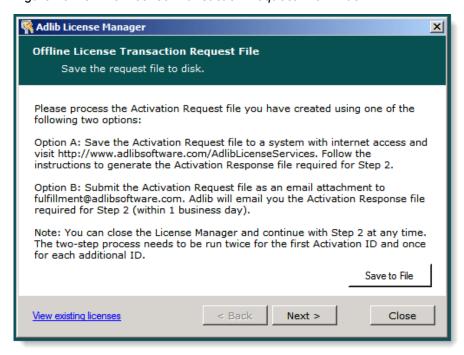
- 3. In the Offline License Transaction Steps window, select Step 1: Generate an offline activation request file.
- 4. Type the **Activation ID** provided by Adlib Fulfillment and click **Next**.

Figure 28 - Offline License Transaction Steps window



- 5. In the Offline License Transaction Request File window, click **Save to File** and choose a location to save the file to your computer.
- 6. Click Next.

Figure 29 - Offline License Transaction Request File window



- 7. The file must then be processed using one of the following methods
  - Copy the Activation Request file to a system connected to the internet and access <a href="http://www.adlibsoftware.com/AdlibLicenseServices">http://www.adlibsoftware.com/AdlibLicenseServices</a>. An Activation Response file can be generated from this website for the next step in the Activation process.

Or,

- Submit the Activation Request file via email to <u>fulfillment@adlibsoftware.com</u>. An
  Activation Response file sent by Adlib (within one business day) can then be used in the
  next step of the license transaction. The Adlib License Manager can be reopened to
  continue with the next step at anytime.
- 8. Once the response file has been received, copy it to the machine where the Adlib **Transformation Engine** is installed.

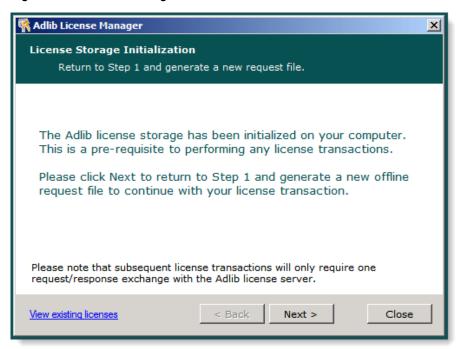
9. In the Offline License Transaction Steps window, select Step 2: Process the Offline Activation Response File and click Browse to locate the file. Click Next.

Figure 30 - Offline License Transaction Steps Window



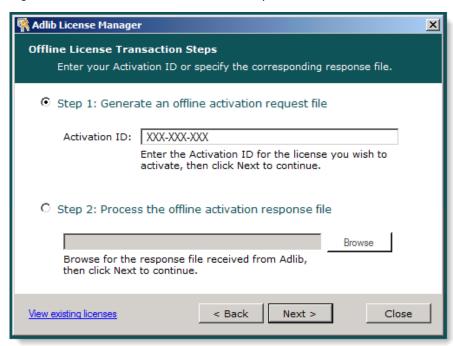
- 10. If Adlib PDF is being licensed for the first time, the *License Storage Initialization* window appears. In order to complete the license transaction, a second request file must be requested and submitted. Click **Next** to return to Step 1.
  - If this is not the first activation of a license, proceed to step 17 in the Offline License Activation procedure.

Figure 31 - License Storage Initialization



11. Click **Next** in the *Offline License Transaction Steps* window. Do not modify the contents of the **Activation ID** field.

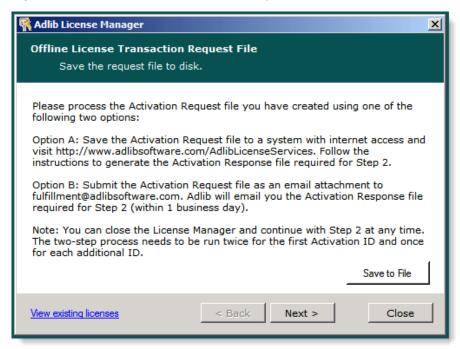
Figure 32 - Offline License Transaction Steps



12. In the *Offline License Transaction Request File* window, click **Save to File** and choose a location to save the file to your computer.

#### 13. Click Next.

Figure 33 - Offline License Transaction Request File window



- 14. The file must then be processed using one of the following methods
  - Copy the Activation Request file to a system connected to the internet and access <a href="http://www.adlibsoftware.com/AdlibLicenseServices">http://www.adlibsoftware.com/AdlibLicenseServices</a>. An Activation Response file can be generated from this website for the next step in the Activation process.

Or.

- Submit the Activation Request file via email to <a href="mailto:fulfillment@adlibsoftware.com">fulfillment@adlibsoftware.com</a>. An Activation Response file sent by Adlib (within one business day) can then be used in the next step of the license transaction. The Adlib License Manager can be reopened to continue with the next step at anytime.
- 15. Once the response file has been received, copy it to the machine where the Adlib **Transformation Engine** is installed.

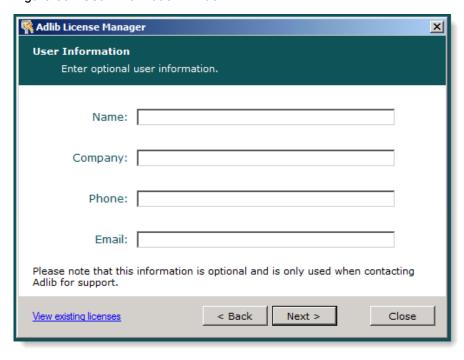
16. In the Offline License Transaction Steps window, select Step 2: Process the Offline Activation Response File and click Browse to locate the file. Click Next.

Figure 34 - Offline License Transaction Steps Window



17. If desired, in the *User Information* window, type the **Name**, **Company**, **Phone** and **Email** and click **Next**.

Figure 35 - User Information window





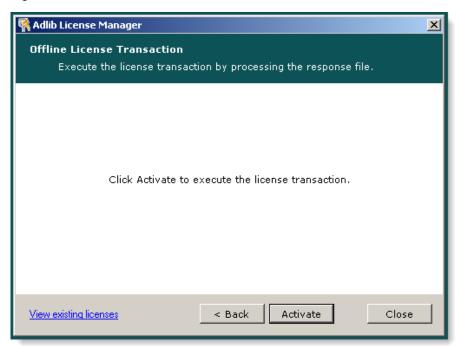
This information is only used when contacting Adlib for support.

18. In the Offline License Transaction window, click Activate to begin the activation.



The **Transformation Engine** must be stopped using the **Process Manager** before performing any type of license transaction. For more details on stopping and restarting the service, see the Adlib PDF User Guide.

Figure 36 - Offline License Transaction window





The Adlib Transformation Engine requires one license per virtual machine.

19. When the license has been activated, click Main Menu to return to the main menu of the Adlib License Manager or Close to exit the application. The Transformation Engine must now be restarted using the Process Manager service before jobs can be processed. For more information on stopping and starting the service, see the Adlib PDF User Guide.

Figure 37 - License Transaction Complete window



## **Rehost License - Online**

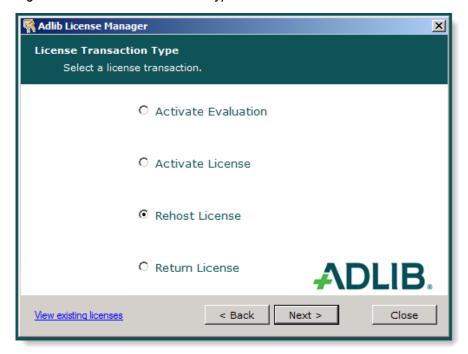
The Rehost License transaction allows a license to be moved from one machine to another by temporarily returning the license to the Adlib license server so it can then re-activating it on a different machine. Rehost can also be used to temporarily remove then return a license to the same machine when making any significant changes to a server (such as virtualizing a server or making any significant hardware changes).

To rehost a license, perform the Rehost License transaction on the original machine and then Activate the license on the new machine. Do not uninstall Adlib PDF until you have completed the rehosting process.

#### **♦** To Rehost a License Online:

1. In the *License Transaction Type* window, select **Rehost License** and click **Next**.

Figure 38 - License Transaction Type window



2. In the License Transaction Method window, select Online and click Next.

Figure 39 - License Transaction Method window





The Adlib License server is only contacted during user-initiated license transactions from the Adlib License Manager application, and not at any other time without explicit user notification and consent.

3. In the *Activation ID* window, type the original **Activation ID** provided by Adlib Fulfillment and click **Next**.



The Activation IDs for all licenses currently in use can be viewed by clicking the **View Existing Licenses** link in the lower left of the Adlib License Manager windows.

Figure 40 - Existing Licenses window

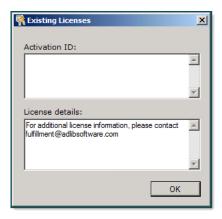
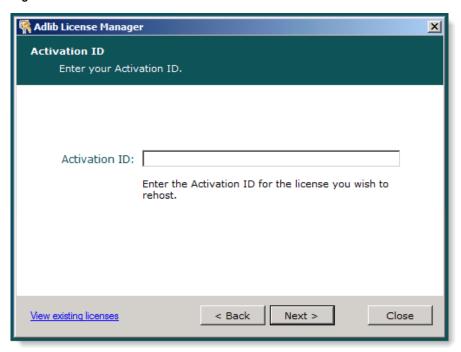


Figure 41 - Activation ID window

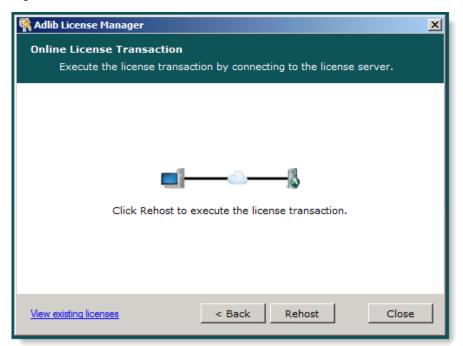


4. In the *Online License Transaction* window, click **Rehost** to return your license temporarily to the Adlib License server.



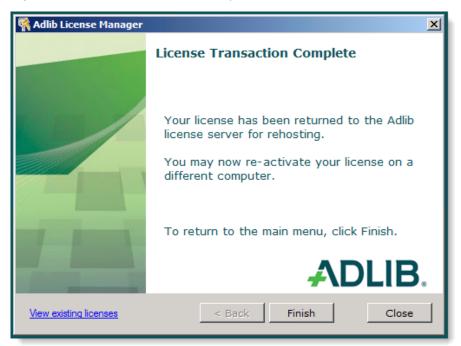
The **Transformation Engine** must be stopped using the **Process Manager** before performing any type of license transaction. For more details on stopping and restarting the service, see the Adlib PDF User Guide.

Figure 42 - Online License Transaction window



5. When the license has been rehosted, click **Finish** to return to the main menu of the Adlib License Manager or **Close** to exit the application.

Figure 43 - License Transaction Complete window





Once the rehost has been completed, the Adlib **Transformation Engine** will return to Evaluation mode with time remaining from the original Evaluation start date.

Adlib PDF can now be uninstalled from the original machine and installed on a new machine, or rather, modifications can be made to the original server before the license is re-activated on the same machine. For detailed uninstallation and instructions, see <a href="Uninstallation and Modification">Uninstallation and Modification</a>. The original license can then be activated on the new machine or on the modified, original machine (see <a href="To Activate a License">To Activate a License</a> <a href="Online">Online</a>:).

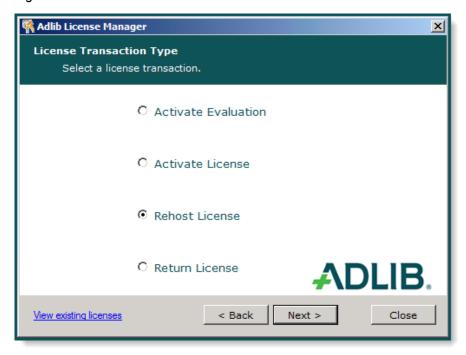
# **Rehost License - Offline**

Licenses can be rehosted offline by generating an rehost request file and transmitting it online to the Adlib license server on an alternate computer or by email to Adlib customer service.

### **♦** To Rehost a License Offline:

1. In the *License Transaction Type* window, select **Rehost License** and click **Next**.

Figure 44 - License Transaction window



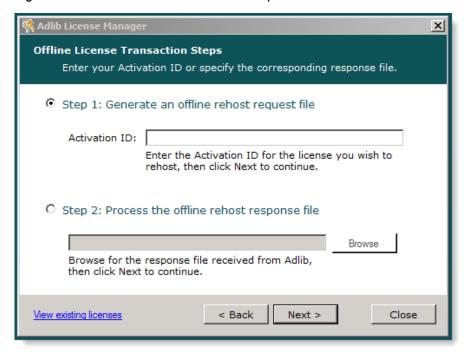
2. In the License Transaction Method window, select Offline and click Next.

Figure 45 - License Transaction Method window



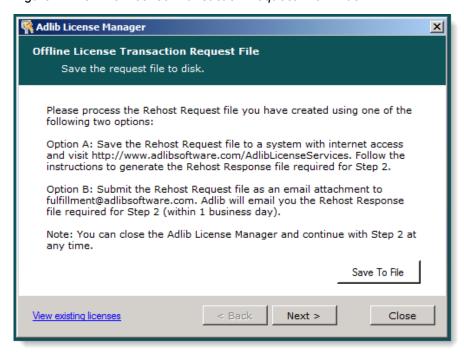
- 3. In the Offline License Transaction Steps window, select Step 1: Generate an offline rehost request file.
- 4. Type the **Activation ID** provided by Adlib Fulfillment and click **Next**.

Figure 46 - Offline License Transaction Steps window



- 5. In the Offline License Transaction Request File window, click **Save to File** and choose a location to save the file to your computer.
- 6. Click Next.

Figure 47 - Offline License Transaction Request File window



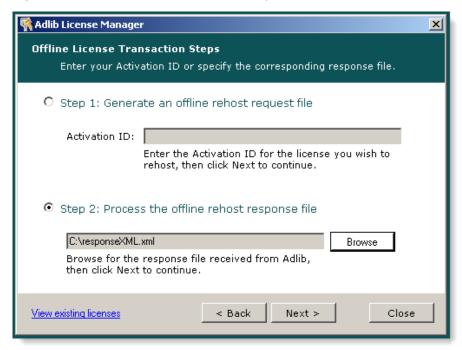
- 7. The file must then be processed using one of the following methods:
  - Copy the Rehost Request file to a system connected to the internet and access <a href="http://www.adlibsoftware.com/AdlibLicenseServices">http://www.adlibsoftware.com/AdlibLicenseServices</a>. A Rehost Response file can be generated from this website for the next step in the Rehost process.

Or,

- Submit the Rehost Request file via email to <a href="mailto:fulfillment@adlibsoftware.com">fulfillment@adlibsoftware.com</a>. A Rehost Response file sent by Adlib (within one business day) can then be used in the next step to complete the license transaction. The Adlib License Manager can be reopened to continue with the next step at anytime.
- 8. Once the response file is received, copy it to the system where the Adlib **Transformation Engine** is installed.

9. In the Offline License Transaction Steps window, select Step 2: Process the offline rehost response file and click Browse to locate the file.

Figure 48 - Offline License Transaction Steps window

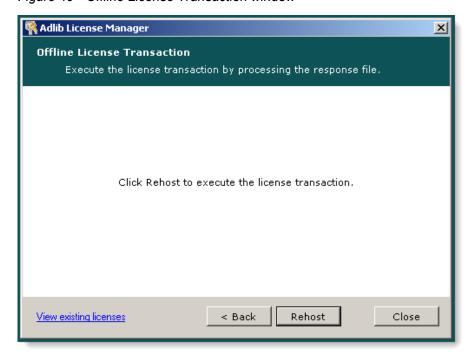


10. In the *Offline License Transaction* window, click **Rehost** to temporarily return the license to the Adlib License server.



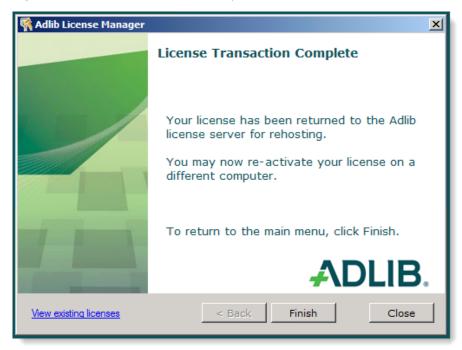
The **Transformation Engine** must be stopped using the **Process Manager** before performing any type of license transaction. For more details on stopping and restarting the service, see the Adlib PDF User Guide.

Figure 49 - Offline License Transaction window



11. When the license has been rehosted, click **Finish** to return to the main menu of the Adlib License Manager or **Close** to exit the application.

Figure 50 - License Transaction Complete window





Once the rehost has completed, the Adlib **Transformation Engine** will return to Evaluation mode with the time remaining from the original Evaluation start date.

Adlib PDF can now be uninstalled from the original machine and installed on a new machine or rather, modifications can be made to the original server. For detailed uninstallation and instructions, see <a href="Uninstallation and Modification">Uninstallation and Modification</a>. The original license can then be activated on the new machine or on the modified, original machine (see <a href="To Activate a License Online">To Activate a License Online</a>.

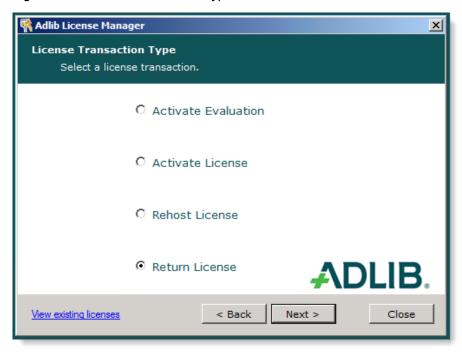
# **Return License - Online**

The Return License transaction permanently returns a license to the Adlib license server.

# **↓** To Return a License Online:

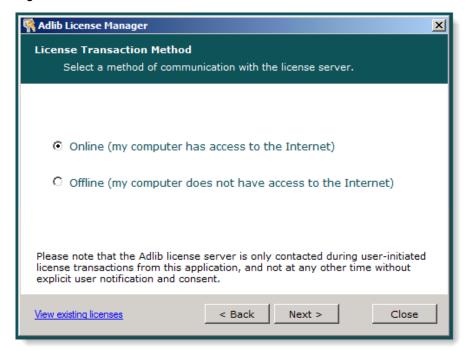
1. In the *License Transaction Type* window, select **Return License** and click **Next**.

Figure 51 - License Transaction Type window



2. In the License Transaction Method window, select Online and click Next.

Figure 52 - License Transaction Method window



3. In the *Activation ID* window, type the **Activation ID** for the license to be returned and click **Next**.

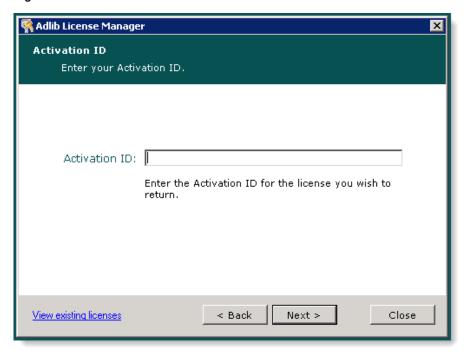


The Activation IDs for all licenses currently in use can be viewed by clicking the **View Existing Licenses** link in the lower left of the Adlib License Manager windows.

Figure 53 - Existing Licenses window

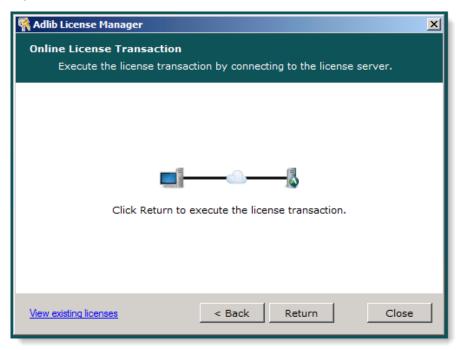


Figure 54 - Activation ID window



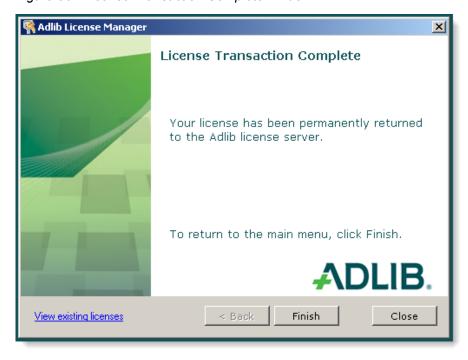
4. In the *Online License Transaction* window, click **Return** to permanently return your license to the Adlib License server.

Figure 55 - Online License Transaction window



5. When the license has been returned, click **Finish** to return to the main menu of the Adlib License Manager or **Close** to exit the application.

Figure 56 - License Transaction Complete window





Once the return has been completed, Adlib **Transformation Engine** returns to Evaluation mode with time remaining from the original Evaluation start date.

If desired, Adlib PDF can now be uninstalled. For detailed uninstallation instructions, see <u>Uninstallation</u> and <u>Modification</u>.

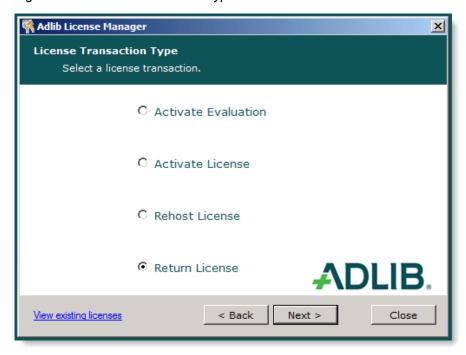
# **Return License - Offline**

Licenses can be returned offline by generating an return request file and transmitting it online to the Adlib license server on an alternate computer or by email to Adlib customer service.

#### **♦** To Return a License Offline:

1. In the *License Transaction Type* window, select **Return License** and click **Next**.

Figure 57 - License Transaction Type window



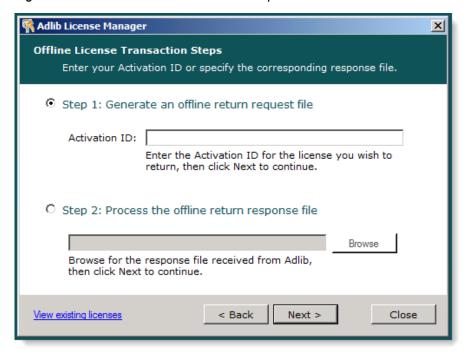
2. In the License Transaction Method window, select Offline and click Next.

Figure 58 - License Transaction Method window



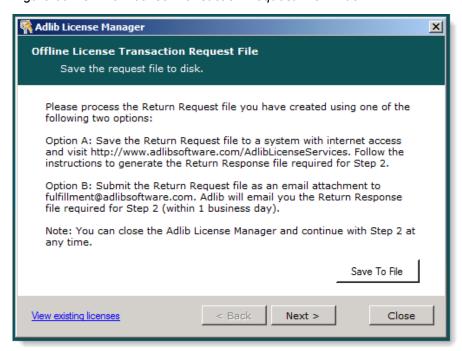
- 3. In the Offline License Transaction Steps window, select Step 1: Generate an offline return request file.
- 4. Type the **Activation ID** provided by Adlib Fulfillment and click **Next**.

Figure 59 - Offline License Transaction Steps window



- 5. In the Offline License Transaction Request File window, click **Save to File** and choose a location to save the file to your computer.
- 6. Click Next.

Figure 60 - Offline License Transaction Request File window



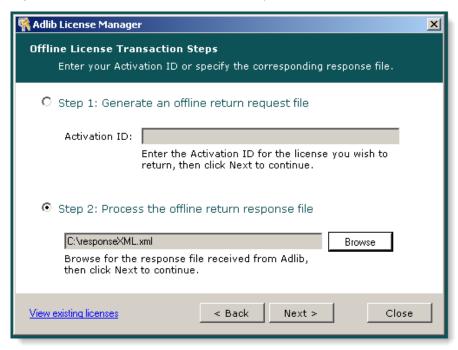
- 7. The file must then be processed using one of the following methods:
  - Copy the Return Request file to a system connected to the internet and access <a href="http://www.adlibsoftware.com/AdlibLicenseServices">http://www.adlibsoftware.com/AdlibLicenseServices</a>. A Return Response file can be generated from this website for the next step in the Return process.

Or,

- Submit the Return Request file via email to <a href="mailto:fulfillment@adlibsoftware.com">fulfillment@adlibsoftware.com</a>. A Return Response file sent by Adlib (within one business day) can then be used in the next step to complete the license transaction. The Adlib License Manager can be reopened to continue with the next step at anytime.
- 8. Once the response file is received, copy it to the system where the Adlib **Transformation Engine** is installed.

9. In the Offline License Transaction Steps window, select Step 2: Process the offline return response file and click Browse to locate the file.

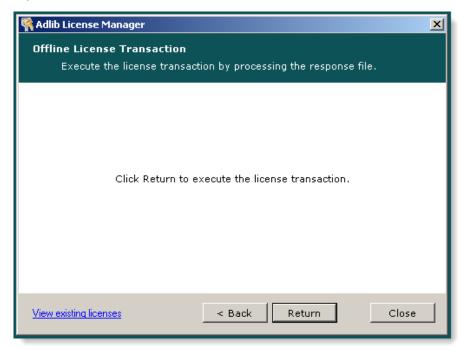
Figure 61 - Offline License Transaction Steps window



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10. In the *Offline License Transaction* window, click **Return** to permanently return the license to the Adlib License server.

Figure 62 - Offline License Transaction window



11. When the license has been returned, click **Finish** to return to the main menu of the Adlib License Manager or **Close** to exit the application.

Figure 63 - License Transaction Complete window





Once the return has completed, the Adlib **Transformation Engine** returns to Evaluation mode with remaining time from the original Evaluation start date.

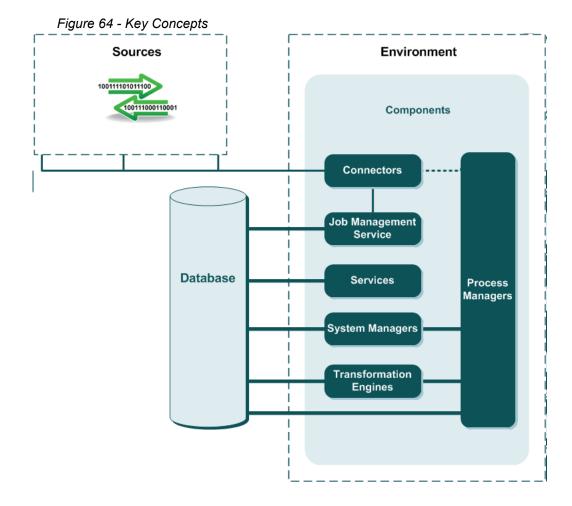
If desired, Adlib PDF can now be uninstalled. For detailed uninstallation instructions, see <u>Uninstallation</u> and <u>Modification</u>.

# **Key Concepts**

The process of document transformation begins when a Connector detects input in a Source repository that it is monitoring. When a new job becomes available, the Connector extracts the content from the Source and submits it to the Job Management Service. The Job Management Service submits the accepted job to the database.

The System Manager is constantly polling the database for jobs it can process. When a new job is detected, the System Manager creates a job ticket and submits the ticket to the database. The Transformation Engine picks up the job, performs the transformation according to the job ticket and writes the completed job back to the database. The Connector, which has been polling the database for completed jobs, uploads the transformed job into the Source output folder or repository.

In addition to the Components that perform content transformation, Adlib PDF contains a Process Manager whose role it is to stop, start and monitor the Transformation Engine, Connector(s) and System Manager. The System Manager also monitors the health of Adlib PDF Components and reports alerts to the system administrator.



# Components

Adlib PDF comprises several Components to interface with users, manage jobs, perform transformations, monitor services, and report system and job status. Adlib PDF includes the following Component types:

#### **Connectors**

A Connector Component monitors a Source for content, submits the content as a job to Adlib PDF, and receives completed job output.

Different types of Connectors integrate with various Source types:

 The Generic Connector integrates with the Web Service interface. Please see the Adlib PDF Integration Guide for more information on how to integrate using the Generic Connector.

# **Job Management Service**

This is a service interface within Adlib PDF used to submit and receive Jobs. It is called by Connectors and custom integrations.

### Logger

This Component logs data into the Adlib PDF database.

# **Process Manager**

This Component controls individual processes on a single machine within the Adlib system. Its role is to start, stop, monitor, and restart the processes assigned to it.

There is one Process Manager Component installed on each machine on which any Adlib Components, such as Folder Connector, are installed.

#### Services

This is a layer of communication services used primarily by the Management Console.

# **System Manager**

This Component manages jobs and monitors all Adlib PDF Components. It prepares jobs for the Transformation Engine by executing the appropriate Transformation Rule Sets. It also monitors the health of Components and issues alerts to the System Administrator.

## **Transformation Engine**

This Component performs the transformation of content.

# **Uninstallation and Modification**

Users can perform a complete uninstallation of the entire Adlib PDF system, including all of the installed Components, or if desired, users can modify an existing installation of Adlib PDF by uninstalling selected Components or by adding new Components to the current configuration. For more information on a multiserver deployment of Adlib PDF, Contact Adlib.

# **Complete Uninstallation**

## **↓** To Perform a Complete Uninstallation:

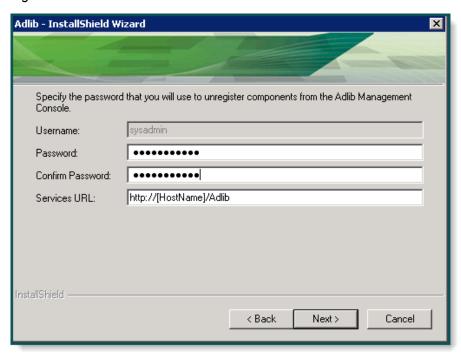
1. On the Windows Start menu, select **Control Panel**, then **Programs and Features**. Select **Adlib** and click **Uninstall**.



Before performing an uninstallation of Adlib PDF, ensure that Process Manager Services have been stopped.

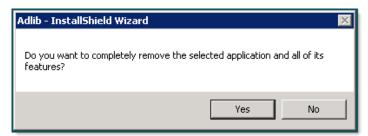
2. In the *Adlib-InstallShield Wizard* window, type the "sysadmin" account Password that was used in the installation of Adlib PDF and ensure that the default Services URL is the URL that hosted the Adlib Services. Click **Next**.

Figure 65 - Adlib - InstallShield Wizard Window



3. To begin the uninstallation, click **Yes** in the confirmation pop-up.

Figure 66 - Uninstall Confirmation pop-up



4. In the *Uninstall Complete* window, click the checkbox if you wish to view the Installation Log, and click **Finish** to complete the uninstallation.

Figure 67 - Uninstall Complete Window



# **Modification**

During modification, a user can choose to uninstall one or more existing Components or add a new Component to the system.



Before uninstalling a Component, ensure that Process Manager Services have been stopped, and that the Component is no longer assigned to an Environment in the Adlib Management Console. For more information, see the Adlib PDF User Guide.

# **↓** To Uninstall one or more Components:

- 1. On the Windows Start menu, select **Control Panel**, then **Programs and Features**. Select **Adlib** and click **Change**.
- 2. In the Adlib Setup Maintenance window, click Modify.

Figure 68 - Adlib Setup Maintenance window

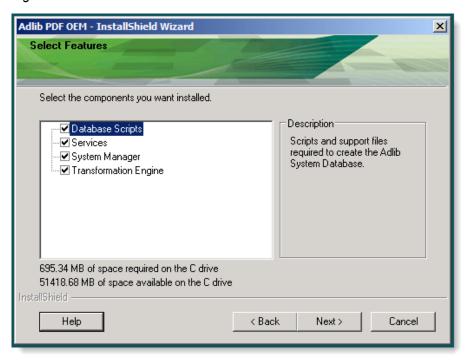


3. In the *Select Features* window, deselect the features to be removed from the system and click **Next**.



The checkboxes for the features that are currently installed will show as selected.

Figure 69 - Select Features window



4. Provide additional Component information as required.



Additional information may be required for the deregistration process, such as the user credentials specified during installation, according to the Component chosen to remove.

5. The Components selected to be removed will be listed in the *Start Copying Files* window. Click **Next** to proceed with the removal. The selected Components will be removed from Adlib PDF.

Figure 70 - Start Copying Files Window



# **↓** To Install a New Component:

1. On the Windows Start menu, select **Control Panel**, then **Programs and Features**. Select **Adlib** and click **Change**.

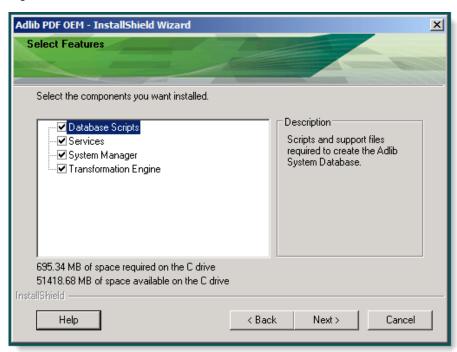
2. In the Adlib Setup Maintenance window, click Modify.

Figure 71 - Adlib Setup Maintenance window



3. In the Select Features window, select the features to be added to the system and click Next.

Figure 72 - Select Features window



4. Provide additional Component information as required.

 The Components selected to be installed will be listed in the Start Copying Files window. Click Next to proceed with the installation of the Component(s). The selected Component(s) will be added to Adlib PDF.

Figure 73 - Start Copying Files Window



# Appendix A: Content Transformation Viewers and Supported File Types

Adlib PDF provides automated document conversion of over 300 file types to PDF, Text, and Image. During content rendering, the Transformation Engine uses a "viewer" in preparation for transformation to the specified format. In order to select the appropriate rendering viewer, the Transformation Engine must first identify the file type being converted by reading the header and/or the file extension. Once the file type has been identified, the document is rendered and output to the format specified in the Rule Setting.

# Supported Native Applications and Associated Rule Settings

This table contains a list of the native applications that are currently supported; additional applications (and versions) are always being added. The level of support is also indicated for each version/format of the application.



A native application must be installed on the same server as the Transformation Engine performing the processing of the job in order to be used as a viewer.

The levels of support for native applications include:

Level of Support	Definition	Notes
Certified (C)	Extensively tested.	This is the recommended version, edition, language, service pack, etc.
Supported (S)	Known to work, however not subject to the same degree of testing as Certified.	We provide support for these versions, editions, languages, etc., but do not test as thoroughly.
Partially Supported (P)	Is expected to work. We will provide our best effort to support.	These are versions, editions, languages, etc., that are being phased out by their vendor and/or are limited in functionality.



This table refers to only the English versions of each application. Alternative language versions of these applications are not officially supported by Adlib PDF.

Mfgr	Application	Version/Format	Support
Adobe	Framemaker	6.0	S
		7.0	S
Corel	CorelDRAW	8.0	S
		12.0	S
Corel	WordPerfect	8.0 to X5 <sup>1</sup>	S
Ghostscript	Ghostscript	7.04 to 8.15 (32-bit only)	S

Mfgr	Application	Version/Format	Support
Microsoft	Excel <sup>4</sup>	2003	Р
		2007 <sup>3</sup>	С
		2010 <sup>5</sup>	С
		2013 <sup>5</sup>	С
Microsoft	InfoPath	2003 <sup>2</sup>	Р
		2007	С
		2010 <sup>5</sup>	С
		2013 <sup>5</sup>	С
Microsoft	Internet Explorer	7.0	Р
		8.0	С
		9.0	С
Microsoft	Outlook	2003	Р
		2007 <sup>3</sup>	С
		2010	С
		2013 <sup>5</sup>	С
Microsoft	PowerPoint <sup>4</sup>	2003	Р
		2007 <sup>3</sup>	С
		2010 <sup>5</sup>	С
		2013 <sup>5</sup>	С
Microsoft	Project	2003	Р
		2007	С
		2010 <sup>5</sup>	С
		2013 <sup>5</sup>	С
Microsoft	Visio	2003	Р
		2007 <sup>3</sup>	С
		2010 <sup>5</sup>	С
		2013 <sup>5</sup>	С
Microsoft	Word <sup>4</sup>	2003	Р
		2007 <sup>3</sup>	С

Mfgr	Application	Version/Format	Support
		2010 <sup>5</sup>	С
		2013 <sup>5</sup>	С
Microsoft	WordPad	5.x	Р
		6.x	С
Oracle	OpenOffice.Org (Calc, Impress, Writer)	3.0	С
		3.0.1	С

# **Native Application Notes:**

- 1. Internal content hyperlink creation not supported for WordPerfect. X4 and X5 only validated for Windows Server 2003 32-bit environment.
- 2. Microsoft Office 2003 Service Pack 1 (or greater) required.
- 3. Microsoft Office 2007 Service Pack 2 required.
- 4. It is recommended that the Save AutoRecover options within Word, Excel and PowerPoint be disabled.
- 5. Support is currently available for only the 32-bit versions of Microsoft InfoPath, Word, Excel, PowerPoint, Project and Visio 2010 and all Microsoft Office 2013 applications.

# **Adlib Viewer Support**

Adlib viewers are installed with the Transformation Engine and are used to render Text (non-unicode), Images, HPGL, MSG and PDF file types. This method ensures the highest rendering accuracy and efficiency for these document types.

# **Adlib Viewer Supported File Types and Associated Rule Settings**

Input File Type	Output File Type
PDF	HTML
PDF	JPEG
CAD <sup>1</sup>	PDF
Image <sup>2</sup>	PDF
OCR <sup>2</sup>	PDF
Text (non-unicode)	PDF
XSL-FO	PDF
PDF	Png
PDF	Text
PDF	Tiff
PDF	Cals
PDF	Gif
PDF	Xps

# **Adlib Viewer Notes:**

- 1. Requires a CAD license.
- 2. For a list of all supported Image and OCR input file types see the <u>Supported File Types</u> table.

# **Generic Viewer Support**

The Generic viewer is installed with the Transformation Engine and supports the rendering of hundreds of file types. This method ensures rendering efficiency without requiring additional software to be installed on the computer performing the conversion.

For a list of all file types that are currently supported by the Generic viewer, see the <u>Supported File Types</u> table.

# Supported File Types Table - Levels of Support

The supported file types table indicates the level of support for the rendering of each version/format of the files, according to the viewer(s) used to process that file.

The levels of support for file formats include:

Level of Support	Definition	Notes
Certified (C)	Extensively tested and fully supported.	Rendition quality of the output file is nearly is not perfectly identical to the input document under all circumstances.
Supported (S)	Known to work; format not as thoroughly tested as Certified formats.	Possible minor issues in output quality compared to the original input document is possible in some rare circumstances.
Partially Supported (P)	Expected to work but not fully tested.	Formats that may have known limitations and/or produce a noticeably lower level of output quality when compared to the original input document in some or all circumstances.
		Variations in the input document, for example a seldom used compression format within an image file, may cause output quality problems or fail to render.

# **Supported File Types**

File Type	File Extensions	Versions/Formats	NAS	Adlib	Generic
Adobe Acrobat	PDF	All		С	
Adobe FrameMaker	MIF	6.0			Р
Adobe FrameMaker	FM	6.0, 7.0	S		
Adobe FrameMaker Graphics	FMV	Vector/raster to 5.0			Р
Adobe Illustrator	Al	1.0 to 7.0, 9.0, CS3			С
Adobe Photoshop	PSD	4.0, CS3			С
Ami Draw	SDW	Ami Draw			Р
ANSI Text	TXT	7 & 8 bit		С	
AutoCAD Drawing Web Format	DWF	2012 and below		C <sup>1</sup>	
AutoCAD Interchange	DXF	2012 and below		C <sup>1</sup>	
AutoCAD Native Drawing	DWG	2012 and below		C <sup>1</sup>	
AutoDesk Inventor	DWG, IAM, IDW, IPT	11 and below		C <sup>1</sup>	
AutoDesk Inventor	DWG, IAM, IDW, IPT	2011, 2012		C <sup>1, 15</sup>	
AutoShade Rendering	RND	2.0			Р
Bentley MicroStation Drawing	DGN	8.9, 8.5, 8.1, and below		C <sup>1</sup>	
Binary Group 3 Fax		All			Р
Bitmap	BMP, ICO, DIB			С	
CADKEY	PRT			C <sup>1</sup>	
CalComp PCI 906/907 Plot	906			C <sup>1</sup>	
CALS Group IV	CAL, CG4, MIL, ODA, C4	Type I, Type II			С
CAMCAD	СС			P <sup>1</sup>	
CIT Intergraph Group IV	CIT	All		P <sup>1</sup>	
Computer Graphics Metafile	CGM	ANSI, CALS			С
Computer Graphics Metafile	CGM	4		C <sup>1</sup>	

File Type	File Extensions	Versions/Formats	NAS	Adlib	Generic
Corel Clipart format	CMX	5.0 to 6.0			Р
Corel Draw	CDR with TIFF header	2.0 to 9.0	S		С
Corel Draw	CDR	6.0 to 12.0	S		С
Corel/Novell Quattro Pro		1.0 to 12	S		С
Corel/Novell WordPerfect	WPD, WP5	1.0 to 12, X3	S		Р
DataEase		4.x			Р
dBASE		1.0 to 5.0			Р
dBXL		1.3			Р
DEC WPS Plus	DX	1.0 to 4.0			Р
DEC WPS Plus	WPL	1.0 to 4.1			Р
DG Auto-trol Vector	DG			P <sup>1</sup>	
DisplayWrite 2 & 3	TXT	All			Р
DisplayWrite 4 & 5		1.0 to 2.0			Р
Enable		3.0, 4.0, 4.5			Р
Encapsulated PostScript	EPS	TIFF header only			S <sup>10</sup>
Executable	EXE, DLL				C <sub>6</sub>
Extensible Markup Language	XML, XSL	All	C <sup>4</sup>		
First Choice		1.0 to 3.0			Р
FoxBase		2.1			Р
Framework		3.0			Р
Freelance for OS/2		1.0 to 2.0			Р
Freelance for Windows		1.0 to 9.6			Р
GEM Paint	IMG				Р
Graphics Environment Manager	GEM	Bitmap & vector			Р
Graphics Interchange Format	GIF			С	
GZIP Compression Utility	GZ				Р
Harvard Graphics for DOS		2.x, 3.x			Р

File Type	File Extensions	Versions/Formats	NAS	Adlib	Generic
Harvard Graphics for Windows	PRS	All			Р
Hewlett Packard Graphics Language	HP, HPGL, HGL, HPG, PLT, 000, HPGL/2			С	
Hewlett Packard Graphics Language	HPGL, HPGL/2			C <sup>1</sup>	
Hewlett Packard ME10	CMI, MI	13 and below		P <sup>1</sup>	
Hypertext Markup Language	HTM, HTML	1.0 to 3.0	С		С
Hypertext Markup Language	HTM, HTML, CSS	All	C <sup>3</sup>		
IBM FFT		All			Р
IBM Graphics Data Format	GDF	1.0			Р
IBM Picture Interchange Format	PIF	1.0			Р
IBM Revisable Form Text		All			Р
IBM Writing Assistant		1.01			Р
Initial Graphics Exchange Specification	IGES	5.2		P <sup>1</sup>	Р
Joint Photographic Experts Group	JPG, JPEG, JPE			С	
JPEG 2000	J2K, JP2		С		
JustSystems Ichitaro		5.0, 6.0, 8.0, 9.0			Р
JustWrite		1.0 to 3.0			Р
Kodak Flash Pix	FPX				Р
Kodak Photo CD	PCD	1.0			Р
Legacy	LEG	1.0 to 1.1			Р
Lotus 1-2-3 (DOS & Windows)	WK1, WK3, WK4, WKS	1.0 to 5.0			S
Lotus 1-2-3 (OS/2)		1.0 to 2.0			S
Lotus 1-2-3 Charts (DOS & Windows)	WK1, WK3, WK4, WKS	1.0 to 5.0			S
Lotus 1-2-3 for SmartSuite	WK1, WK3, WK4, WKS	97 to 9.6			S

File Type	File Extensions	Versions/Formats	NAS	Adlib	Generic
Lotus AMI/AMI Professional		1.0 to 3.1			Р
Lotus Manuscript		2.0			Р
Lotus Notes	NSF		P <sup>7</sup>		
Lotus PIC					Р
Lotus Snapshot		All			Р
Lotus Symphony		1.0,1.1, 2.0			Р
Lotus Word Pro	LWP, MWP	96 to 9.8			S
LZA Self Extracting Compress					Р
Macintosh PICT1 & PICT2		Bitmap only			Р
MacPaint	PNTG				Р
MacWrite II		1.1			Р
MASS11	M11	1.0 to 8.0			Р
Micrografx Designer	DRW	1.0 to 3.1			Р
Micrografx Designer	DSF	6.0			Р
Micrografx Draw	DRW	1.0 to 4.0			Р
Microsoft Access		1.0 to 2.0			С
Microsoft Binder	OBD	7.0 to 97			Р
Microsoft Excel Charts	XLC	2.x to 7.0			Р
Microsoft Excel	XML	2003	S		
Microsoft Excel	XLS, XLT	2.2 to 2003	С		С
Microsoft Excel	XLSX, XLTX	2007, 2010, 2013	C <sup>16</sup>		С
Microsoft Infopath	XML	2003, 2007, 2010, 2013	С		
Microsoft Multiplan		4.0			Р
Microsoft Outlook	MSG	2003, 2007, 2010, 2013	С	С	С
Microsoft Outlook Express Mail Message	EML		С	С	С
Microsoft PowerPoint	PPT, PPS	3.0 to 2003	С		С
Microsoft PowerPoint	PPTX	2007, 2010	C <sup>14, 16</sup>		С

File Type	File Extensions	Versions/Formats	NAS	Adlib	Generic
Microsoft PowerPoint	POT	3.0 to 2010	С		
Microsoft Project		98 Text only			С
Microsoft Project		2002 to 2010	С		
Microsoft Publisher	PUB	2013	S		
Microsoft Rich Text Format	RTF	All	C <sub>8</sub>		
Microsoft Snapshot Viewer	SNP	9.0 to 11	Р		
Microsoft Visio Drawing	VSD	All	С		С
Microsoft Visio Drawing	VSDX	2013	С		
Microsoft Visio Stencil	VSS	2003 to 2010	С		
Microsoft Visio Template	VST	2003 to 2010	С		
Microsoft Visio Web Drawing	VDW	2010	С		
Microsoft Windows Write		1.0 to 3.0			Р
Microsoft Word	XML	2003	s		
Microsoft Word	DOC	1.0 to 2003	С		С
Microsoft Word	DOCX	2007, 2010, 2013	C <sup>16</sup>		С
Microsoft Word	DOT	1.0 to 2010	С		
Microsoft Works		1.0 to 2.0			Р
Microsoft Works	WPS	1.0 to 4.0			Р
MIME HTML	MHT		С		
MIME Text Mail				С	Р
Mosaic Twin		2.5			Р
MultiMate		1.0 to 4.0			Р
Navy DIF		All			Р
Nota Bene		3.0			Р
Novell Perfect Works		2.0			Р
Novell Perfect Works (Draw)		2.0			Р

File Type	File Extensions	Versions/Formats	NAS	Adlib	Generic
Novell Quattro Pro for DOS	WB1	1.0 to 5.0			Р
Nuance OmniPage/ PaperPort	MAX			C <sup>10</sup>	
OpenOffice.org Calc	ODS, OTS, SXC, STC	1.0 to 3.0.1	С		С
OpenOffice.org Impress	ODP, OTP, SXI, STI	1.0 to 3.0.1	С		С
OpenOffice.org Writer	ODT, OTT, SXW, STW	1.0 to 3.0.1	С		С
Office Writer		4.0 to 6.0			Р
OrCAD	DSN	10		C <sup>1</sup>	
OS/2 PM Metafile	MET	3.0			Р
Paint Shop Pro 6 Win32 only	PSP	5.0 to 6.0			Р
Paradox (DOS)		1.0 to 4.0			Р
Paradox (Windows)		1.0			Р
PC Paintbrush	DCX, PCX			С	
PC-File Letter		1.0 to 5.0			Р
Personal R:BASE		1.0			Р
PFS:Professional Plan		1.0			Р
PFS:Write		A, B, C			Р
PKWARE Archive	ZIP	All		C <sup>13</sup>	
Portable Bitmap	PBM	All		С	
Portable Graymap	PGM	All		С	
Portable Network Graphics	PNG	1.0		С	
Portable Pixmap	PPM	All		С	
Postscript	PS	Level II			S <sup>11</sup>
Postscript	PS	Level II, III	S <sup>2</sup>		
Professional Write		1.0 to 2.1			Р
Professional Write Plus		1.0			Р
Q & A		1.0 to 2.0			Р
Q & A Write for Windows		3.0			Р
R:BASE 5000		1.0 to 3.1			Р

File Type	File Extensions	Versions/Formats	NAS	Adlib	Generic
R:BASE System V		1.0			Р
Reflex		2.0			Р
RLE Intergraph Runlength	RLE	All		P <sup>1</sup>	
Samna Word		1.0 to IV+			Р
SmartWare II	DEF	1.02			Р
SolidWorks 2D	SLDDRW	2008 and below		C <sup>1</sup>	
Sprint		1.0			Р
StarOffice Calc	SDC		C <sup>12</sup>		С
StarOffice Impress	SDA		C <sup>12</sup>		С
StarOffice Writer	SDW		C <sup>12</sup>		С
Sun Raster	SRS	All			Р
SuperCalc 5		4.0			Р
Tagged Image File Format	TIF, TIFF	All		С	
Text Mail	MIME			С	С
Total Word		1.2			Р
Truevision Targa	TGA	2		С	
Unicode Text	ТХТ	All	C <sup>5</sup>	С	Р
Unigraphics SolidEdge 2D	DFT	8 to 20		C <sup>1</sup>	
UNIX Compress	GZ				Р
UNIX TAR					Р
UUEncode					Р
vCard	VCF	2.1			Р
Volkswriter 3 & 4		1.0			Р
VP Planner 3D		1.0			Р
Wang PC	IWP	1.0 to 2.6			Р
Wavesoft	MOT			P <sup>1</sup>	
WBMP		All			Р

File Type	File Extensions	Versions/Formats	NAS	Adlib	Generic
Windows Enhanced Metafile	EMF	All			S
Windows Metafile	WMF	All		S	
Wireless Markup Language	WML	5.2			Р
WordMARC		1.0 to Composer			Р
WordPerfect Graphics	WPG, WPG2	1.0 to 2.0			С
WordStar		1.0 to 7.0			Р
WordStar 2000	DOC	1.0 to 3.0			Р
WordStar for Windows	DOC	1.0			Р
X-Windows Bitmap	XBM	x10 compatible			Р
X-Windows Dump	XDM	x10 compatible			Р
X-Windows Pixmap	XPM	x10 compatible			Р
XSL Formatting Objects Form	FO, XML			С	
XyWrite	XYP	1.0 to III Plus			Р

## **Rendering Notes:**

- 1. Requires CAD license.
- 2. Requires Ghostscript.
- 3. Supports Hypertext Markup Language (HTML) with Cascading Style Sheets (CSS).
- 4. Supports Extensible Markup Language (XML) with Extensible Style Sheet Language (XSL).
- 5. Requires WordPad.
- 6. The output will be a report of technical file information.
- 7. Only NSF files with one email are supported.
- 8. WordPad will be used to convert the document unless Microsoft Word is installed.
- 9. The Encapsulated PostScript (EPS) file specification allows a graphic file to be included for screen preview. The graphic file formats supported are: PICT (MAC), TIFF, Metafile and EPSI. The Adlib Transformation Engine only supports EPS files with TIFF graphic file format.
- 10. Requires Recognition license.
- 11. In some instances PostScript files have a loss in fidelity when rendering. Native Application (Ghostscript) processing produces higher quality PDF files and is recommended.
- 12. Requires OpenOffice.org equivalent (Calc, Impress or Write) installed.
- 13. Contents of the Zip file are merged into a single output. Contents appear in the order they were added to the Zip file.

- 14. It is recommended that High Quality printing be enabled within the PowerPoint 2007 native application. This setting provides the best quality when rendering PowerPoint files through the Adlib PDF Transformation Engine.
- 15. Autodesk Inventor View 2011/2012 must be installed prior to the Transformation Engine to support the rendering of these files.
- 16. If using Microsoft Office 2003 NAS to render, the Microsoft Office Compatibility Pack is required in addition to Microsoft Office 2003 Service Pack 3.

Additional file types are continually being added. If the file type you are looking for is not listed please email Adlib at <a href="mailto:support@adlibsoftware.com">support@adlibsoftware.com</a>.

## **General Notes:**

- a) This list only contains the most common file extensions used for each file type. Other file extensions may exist.
- b) File extensions are not used to identify the file type except for CAD files and files that do not contain file information (e.g. HPGL).
- c) Please let us know if you need additional file type support.

# Appendix B: Database Growth Management

Database Growth Management settings are included with Adlib PDF to assist in controlling database growth as a result of the job information that is retained during the operation of the system.

When logging in Info mode, approximately 200KB of job information will be retained per successful job. Unsuccessful jobs and/or higher logging levels may retain additional information, requiring up to 3-4x as much space in the database.

# **Database Growth Management Modes**

Database Growth Management runs in two modes:

# Mode 1: SQL Express only

Since SQL Express databases have a data size cap (10GB for Express 2008) a mandatory "by-size" cleanup will be performed by default when this type of database is detected. Every hour, Database Growth Management will check if the database has reached 80% of capacity. If it has, enough records will be purged to reduce the size to 50% of capacity.

#### Mode 2: SQL Server

By default, the Database Growth Management procedure will purge jobs and any associated child records older than 90 days at 2:00am local time.

#### **Database Tables**

The following tables are involved in the cleanup process:

SRT\_JOB\_ARCHIVE
SRT\_JOB\_DOCUMENT\_ARCHIVE
SRT\_JOB\_GROUP
ELS\_LOG\_ENTRY
ELS\_STATISTIC\_ENTRY



Any records in the ELS tables associated with a purged job will be purged themselves (the JOB\_CONTEXT field is checked for the association). Additionally, any unassociated records in these tables (null/empty JOB\_CONTEXT field) older than the purged job will also be removed. Therefore the database will never retain any ELS records older than the most recently purged job.

# **Appendix C: Software Product Activation FAQ**

# What is Activation?

Software activation is an interactive representation of Adlib's license agreement for our valued customers. Activation protects the intellectual property and innovation delivered within Adlib's products.

Adlib is committed to preventing unauthorized use of its software using methods designed to have minimal impact on licensed users. When a customer installs an Adlib product that requires activation, the software will automatically attempt to activate via a connection to the Internet. The license information will be sent to Adlib and it will be verified without any action by the customer. For installations without an active internet connection there is a convenient 'offline' method for activating Adlib software products.

The activation process does not transmit any personally identifiable information, except to the extent that IP addresses may be considered personally identifiable in some locations, nor does it limit licensed users' ability to use the software the way they always have under the Adlib End-User License Agreement.

# **How Does Activation Work?**

A unique Activation ID is issued to the end-user, which corresponds to license rights stored on the Adlib License Server. The Adlib License Manager application (included with the software installation) is used in conjunction with the Activation ID to transfer those license rights to the end-user machine; this is referred to as "activating" the license, and is only required to be performed once. Adlib License Manager also supports other license lifecycle transactions, such as transferring ("rehosting") a license from one end-user machine to another, upgrading a license, and activating additional licenses.

# Why is Activation Necessary?

To ensure that the software is used in compliance with the product license, in terms of:

- 1. Concurrent Installations
- 2. Feature Set
- 3. Expiry Date
- 4. Support/Upgrade Policies

# How can I Activate my Product License?

In the Adlib License Manager (Start/Programs/Adlib), select Activate License. You can choose one of two activation methods:

1. Online (automatic via Internet)

This method requests an Activation ID and contacts the Adlib License Server directly via the Internet, activating the license automatically without further user interaction. Please note that your network must permit communication through port 80 for this activation method to succeed.

#### 2. Offline (manual via proxy)

This method requests an Activation ID and generates an XML file that contains the activation request. The request file must be submitted to Adlib for processing, either through the Adlib self-serve web page (<a href="http://www.adlibsoftware.com/AdlibLicenseServices">http://www.adlibsoftware.com/AdlibLicenseServices</a>), or by email attachment to <a href="mailto:fulfillment@adlibsoftware.com">fulfillment@adlibsoftware.com</a>. An XML file will be returned that contains the activation response, which must be input into the Adlib License Manager to complete the activation.

### What about Evaluation Licenses?

The standard 30-day evaluation license is embedded within the Adlib License Manager, and therefore does not require an Activation ID or communication with the Adlib License Server. However, you must still activate this license through the "Activate Evaluation" option when you are ready to begin your evaluation period.

# Can I Extend my Evaluation Period?

Yes. If you require additional time to evaluate the product, please contact your Adlib representative. Evaluation extensions require an Activation ID and must be activated against the Adlib License Server in the same manner as full product licenses.

# Is an Internet Connection Required for Activation?

No. If the machine requiring the activation does not have Internet access, you can use any other Internet enabled machine as a manual proxy. If this is still not feasible, you can send an offline activation request by regular mail on any portable file storage medium.

# How Often will the Software Contact the Adlib License Server?

The Adlib License Server is only contacted by the Adlib License Manager during user-initiated license transactions (activations, rehosts and returns). There is no "background" communication with the Adlib License Server. The only exception to this rule is for silent installations, where the installer can be configured to automatically perform an activation.

# Does Activation Transmit any Personal Information from my Machine?

No. A unique machine ID is generated and transmitted to the Adlib License Server when activating, for the purpose of ensuring the uniqueness of each activation. This machine ID acts as a cumulative hardware "signature" and does not include details about the specific make or model of individual hardware components.

# Why do Offline Activations Sometimes Require More than Two Steps?

If an end-user machine has never performed an activation, its license storage must be initialized by the Adlib License Server before any activations can occur. Initialization is a distinct step that cannot be combined with the activation itself. Because the Adlib License Server cannot know whether an end-user machine requires initialization until it receives an activation request, such a request may result in an initialization rather than activation. For online activations, this process is transparent to the end-user since Adlib License Manager will automatically submit a new activation request in the event of an initialization response. For offline activations, however, an initialization response will require the user to manually submit a new activation request.

# Can I Activate using my old Customer Number/Serial Number?

No. Please contact your Adlib representative to obtain an Activation ID.

# Can I Transfer my License to a Different Machine after Activation?

Yes. Select the "Rehost" option in Adlib License Manager to temporarily return your license to the Adlib License Server. The license is now available to be activated on a different machine.

# Will I Lose my License if I Format my Hard Drive after Activation?

No. Simply re-install the software and activate using your original Activation ID. Please note that if you are also making significant hardware changes to the machine, it is recommended that you rehost your license first to ensure that it can be re-activated on the new hardware configuration.

## Will Activation Work in a Virtual Machine Environment?

Yes. Please note that each virtual machine will require its own unique activation. If you plan on virtualizing an existing installation, please be sure to rehost any existing licenses first, so that they can be successfully activated when running the new virtual machine.

# How will this Impact my Disaster Recovery Plan (DRP)?

The following DRP activities will invalidate an activated license:

- 1. Restoring a system backup to a different machine.
- 2. Virtualizing a machine.
- 3. Moving the boot hard drive to a different machine.

Always be sure to rehost your license before moving to a new machine. If your original machine is unrecoverable and you are unable to perform the rehost, please contact your Adlib representative to obtain a new Activation ID.

## Who do I Contact if I have Questions or Concerns?

Your Adlib representative (+1.905.631.2875), or send an email to <a href="mailtosupport@adlibsoftware.com"><u>support@adlibsoftware.com</u></a>.

# Appendix D: Adlib CAD Viewer Licensing FAQ

The *Adlib CAD Viewer* can be licensed for Adlib PDF and provides the facility to convert many different CAD file types. For a full list of supported CAD file types, please refer to the Adlib PDF User Guide. In order to Activate an *Adlib CAD Viewer* license, the following instructions must be followed to ensure it will be properly registered:



The user performing the CAD Viewer license registration must have Administrator rights.

- Apply the Activation ID provided by Adlib which contains the Adlib CAD Viewer option. (This
  will remove the Adlib CAD Viewer evaluation watermark but will still enforce a 1,000 CAD page
  conversion limit.)
- Send Adlib the computer name that the Transformation Engine and Adlib CAD Viewer will be installed on. (Right click on "My Computer", Select Properties, Computer Name. The first part of "Full computer name" is what Adlib requires.) If the Computer Name is larger than 25 characters, the Adlib CAD Viewer will need to be tied to a system based IP address instead of the Computer Name.
- 3. Stop the Process Manager and NET Enterprise .NET Job Processor Services (if running).
- 4. Apply the updated license key file, named "IGCKey.lic" provided by Adlib into two locations where the Transformation Engine is installed (backup the existing evaluation IGCKey file, descriptive renaming of the file is fine) default locations are as follows:

## 32-bit system:

C:\Program Files\Adlib\Engine\ECAD\JobProcessor

C:\Program Files\Adlib\Engine\ECAD\JobProcessor\ModelPressPublisher

#### 64-bit system:

C:\Program Files (x86)\Adlib\Engine\ECAD\JobProcessor

C:\Program Files (x86)\Adlib\Engine\ECAD\JobProcessor\ModelPressPublisher

- 5. Restart the Services that were stopped in Step 3.
- 6. The *Adlib CAD Viewer* can be evaluated but has a conversion limitation of 1,000 CAD pages. This evaluation limitation is not related to the regular Adlib PDF 30-day trial expiration. Once 1,000 CAD pages have been rendered through the *Adlib CAD Viewer* component, the trial for this module will expire, even if 30 have not passed. The Adlib CAD 30-day evaluation period begins at the time of installation, regardless of when the evaluation license is activated.
- 7. To Rehost Adlib PDF activation (including an *Adlib CAD Viewer* license) to another system, please <u>Contact Adlib</u>.

# **Appendix E: Contact Adlib**

Web Site <u>www.adlibsoftware.com/</u>

Sales <u>sales@adlibsoftware.com</u>

Support support@adlibsoftware.com

Phone 1-905-631-2875 or

1-866-991-1704 (North America)

Fax 1-905-639-3540

Mail Adlib

215-3228 South Service Road

Burlington, Ontario Canada L7N 3H8

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