



# Infor PLM Accelerate 11

## PDF Watermarking Setup Guide

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# Contents

- Intended audience ..... 4
- Related documents ..... 4
- Contacting Infor..... 4
- Chapter 1. Overview ..... 5
- Chapter 2. Prerequisites ..... 6
  - Feature License Key..... 6
    - Requesting a feature license..... 6
    - Installing the license ..... 6
- Chapter 3. Installing Watermarking ..... 8
  - 1.1 Updating ConversionServerConfig ..... 8
  - 1.2 Required Settings..... 8
- Chapter 4. Importing Sample Setup ..... 13
  - 1.3 Importing Metadata ..... 13
  - 1.4 Loading Data ..... 14
  - 1.5 Testing the Sample ..... 14

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## About this guide

This document provides information about how to perform a backup and recovery of the Infor PLM Accelerate software.

## Intended audience

This guide is intended for system administrators. This document assumes that you have at least some knowledge in:

- System architecture and function for your Infor system
- SQL Server database

For the most up-to-date list of software and hardware requirements for Infor products, see the documentation for your system.

## Related documents

You can find the documents in the product documentation section of the Infor Xtreme Support portal, as described in the "Contacting Infor" section below.

## Contacting Infor

If you have questions about Infor products, go to the Infor Xtreme Support portal at [www.infor.com/inforxtreme](http://www.infor.com/inforxtreme).

If we update this document after the product release, we will post the new version on this Web site. We recommend that you check this Web site periodically for updated documentation.

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## Chapter 1. Overview

The PDF Watermarking feature provides the ability to officially mark PDF documents with information such as Life Cycle State (Released, Superseded, etc.).

Watermarking is triggered automatically during Life Cycle promotions, based on rules and templates defined by the administrator. This guide explains the setup required to activate the PDF Watermarking feature and guides the administrator through sample PDF Watermarking setup.

## Chapter 2. Prerequisites

Before proceeding, you need to install a Conversion Server and ensure that you meet the additional prerequisites. For instructions on installing a Conversion Server, see the *Infor PLM Accelerate - Conversion Server Setup Guide*.

You will also need to install Aras PDF Viewer. For instructions on installing Aras PDF Viewer, see Section 2.2 of the *Infor PLM Accelerate - Visual Collaboration Administrator Guide*.

### Feature License Key

The PDF Watermarking feature requires a Feature License in order to run. To check whether a valid Feature License exists in Infor PLM Accelerate:

1. Log into Infor PLM Accelerate as an administrator.
2. Go to Administration\Feature Licenses.
3. PDF Watermarking is activated with the Feature License provided for the Subscription. If a Subscription feature license is found, check the expiration date to confirm that the license is still active.

### Requesting a feature license

In order to request a feature license activation key, customers with an active Aras subscription can send an email to [licenses@aras.com](mailto:licenses@aras.com) or to your account representative in the following format:

- Subject – “PDF Watermarking Activation Key Required”
- Body - Version of Infor PLM Accelerate

You will receive a reply containing the Feature License activation key.

### Installing the license

Once you have the activation key, install the feature license as follows:

4. Log into Infor PLM Accelerate as an administrator.
5. From the main menu toolbar, select **Tools --> Admin --> Licenses --> Activate Feature**.

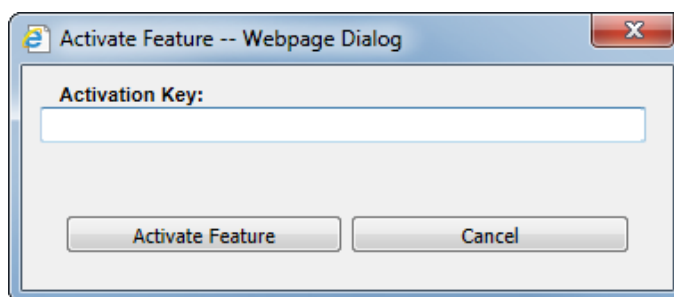


Figure 1.

6. Paste the acquired activation key and click **Activate Feature** button.

A success message should pop up similar to the one shown here.

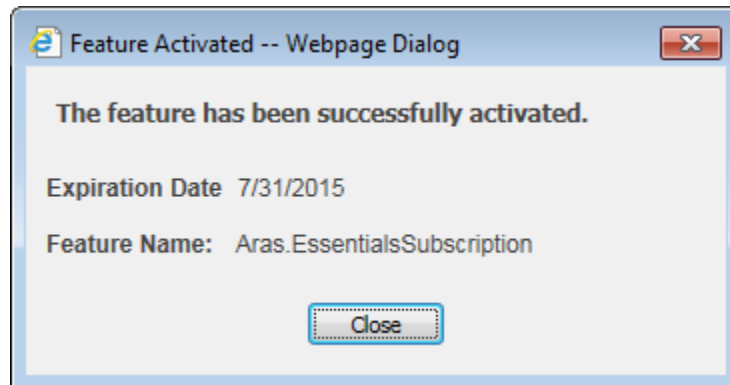


Figure 2.

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## Chapter 3. Installing Watermarking

Before proceeding, make sure the following components are installed:

- Infor PLM Accelerate
- Infor PLM Accelerate Conversion Server
- Infor PLM Accelerate PDF Viewer

### 1.1 Updating ConversionServerConfig

The PDF Watermarking feature requires the Conversion Server in order to run. For information on setting up the Conversion Server see *Infor PLM Accelerate - Conversion Server Setup Guide*.

After the Conversion Server is installed and set up, edit the `ConversionServerConfig.xml` file as follows:

1. Navigate to the root of Conversion Server installation and open the `ConversionServerConfig.xml` file for editing.
2. Add the following line within the `<Converters>` tag.

```
<Converter name="PDF.Watermarking"  
type="Aras.PDF.Watermarking.PdfWatermarkConverter, Aras.PDF.Watermarking"  
>
```

3. Save and close the `ConversionServerConfig.xml` file.

### 1.2 Required Settings

To set up PDF Watermarking the following Items will need to be created according to the needs of your system.

1. Log into Infor PLM Accelerate and go to **Administration\Watermarking** in the TOC.
2. Create a Watermark Type with the Conversion Task Method `wm_CreatePDFWatermarkingTasks`.



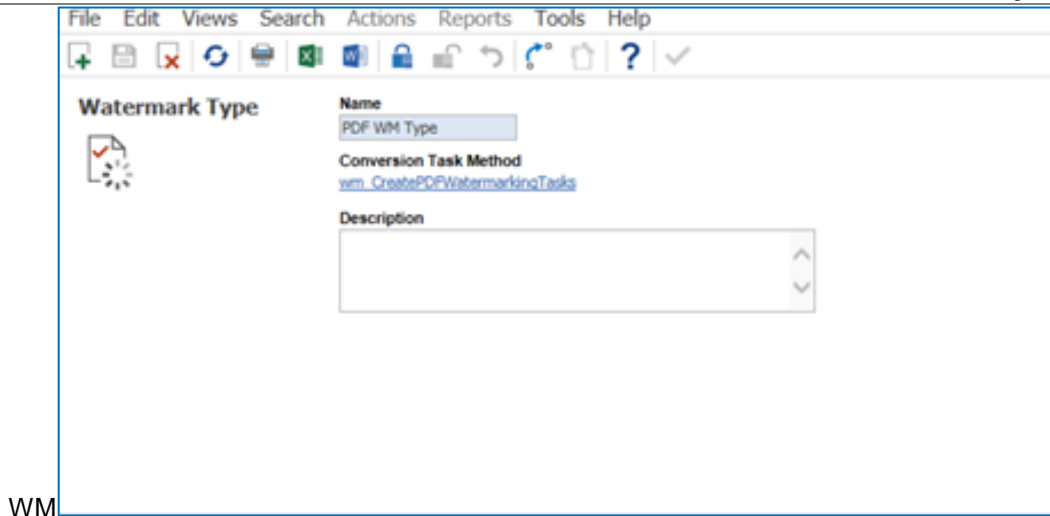


Figure 3.

3. Create a new Watermark Set using the recently created Watermark Type.

The Event Context should be set to OnAfterPromote for the default Watermark Set.

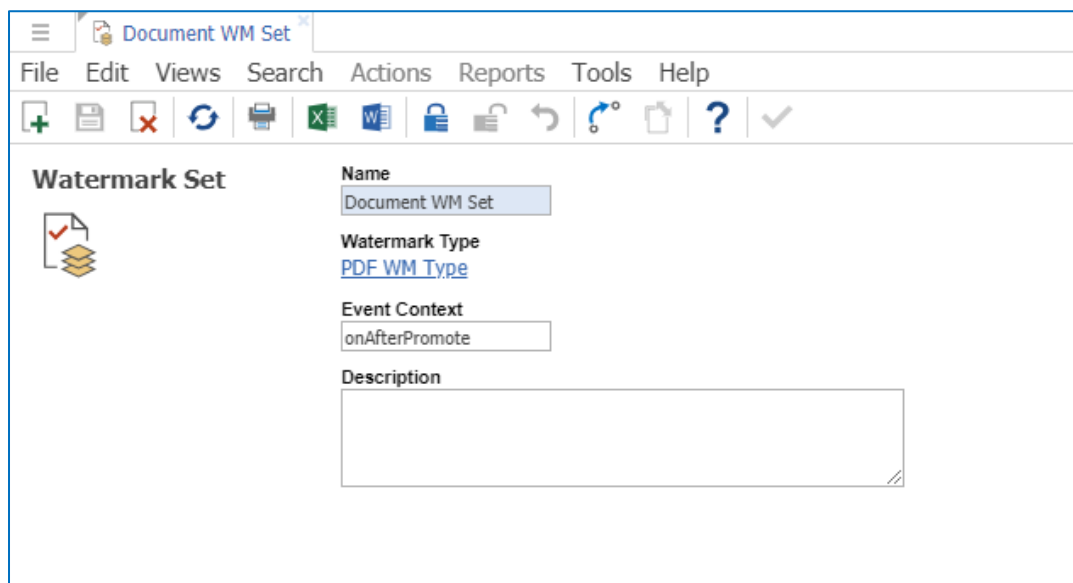


Figure 4.

4. Create the PDF Collections for the appropriate Watermark Context.
  - a. **Name:** Sets the name for the Collection
  - b. **Context:** Identifies the Context for the Watermark
  - c. **Description:** Provides description for internal reference
  - d. **Template File:** PDF file that contains the desired watermark
  - e. **Placement Option:** sets overlay or underlay layer
  - f. **Placement Order:** sets the order of the files (in case more than one is used for the same layer)
  - g. **Pages On:** sets pages where the watermark should apply.

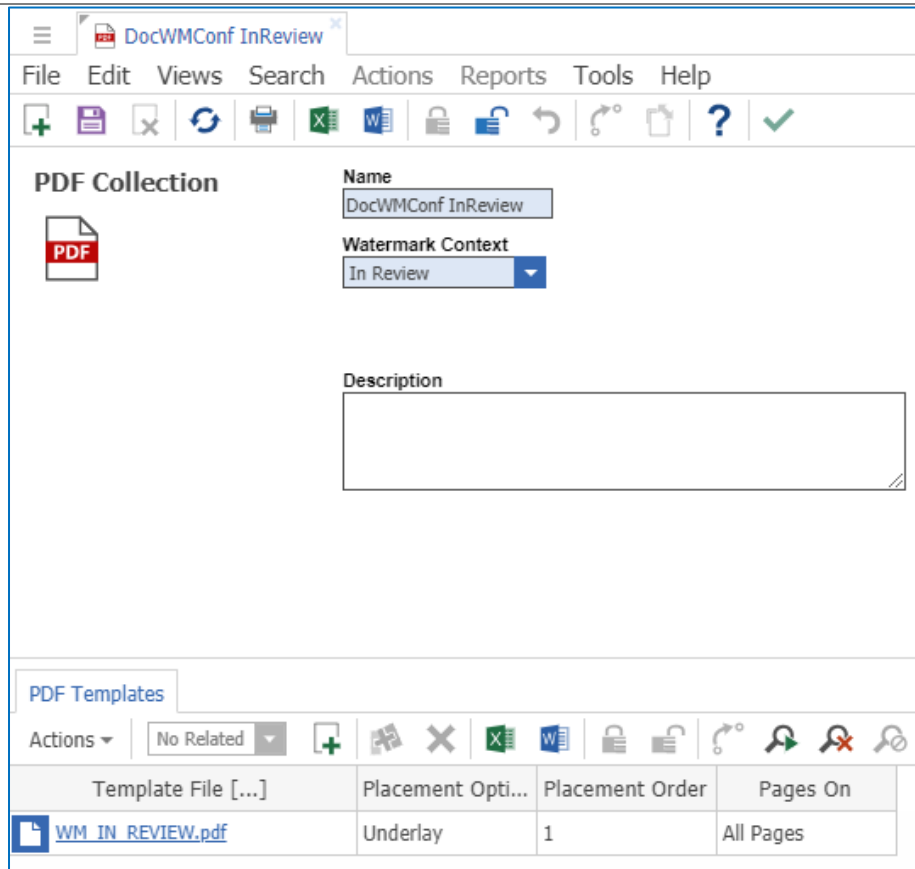


Figure 5.

5. Create a Watermark Rule for your ItemType using the Watermark Set created in Step 3 above.

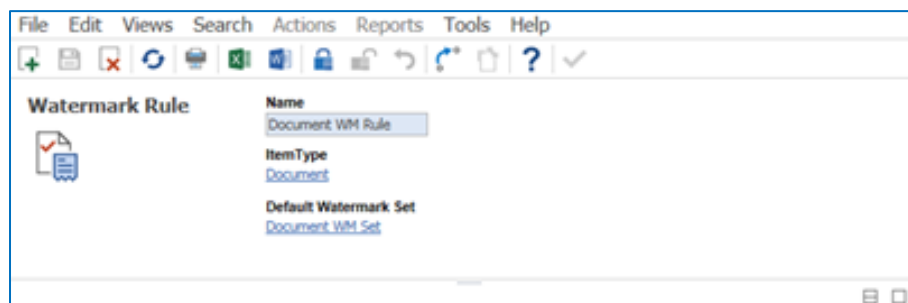


Figure 6.

6. Add a Methods Relationship to you Rule using the following
  - a. **Watermark Type:** Watermark Type created in step 2 above.
  - b. **Watermark Content Lookup:** `wmdt_GetPDFWMContent` Method
    - i. This Method works with the Document File relationship
    - ii. To use an ItemType other than Document File, the Method `wm_SourceLookupTemplate` can be used as a template for developing a custom Method.

- c. **Watermark Configuration Lookup:** `wm_GetWMConfiguration` Method
- d. **Set Watermark Content:** `wmdt_UpdatePDFWMContent` Method
  - i. This Method works with the Document File relationship
  - ii. To use an ItemType other than Document File, the Method `wm_SourceUpdateTemplate` can be used as a template for developing a custom Method.

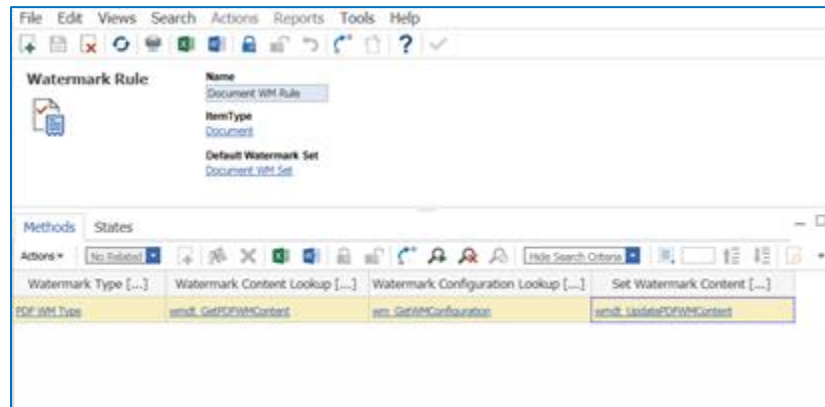


Figure 7.

7. Add the State Relationships from the ItemType where the Watermark Rule should apply.

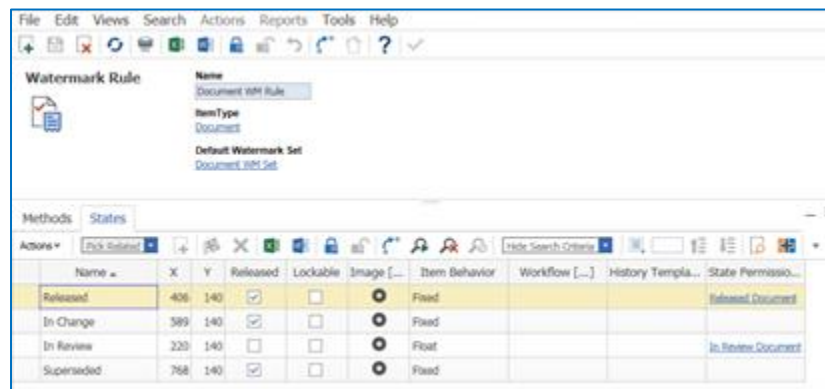


Figure 8.

8. Add PDF Collections created in Step 4 to the Watermark Set created in Step 3 above.

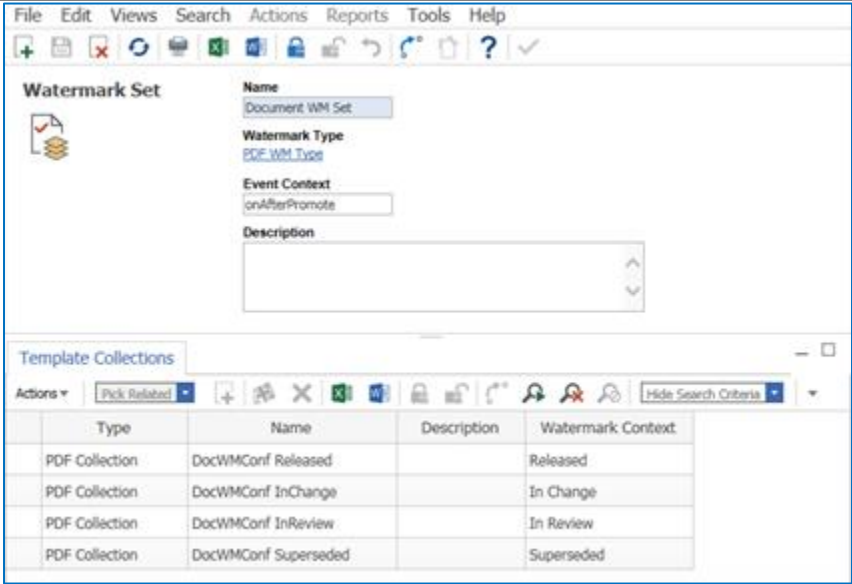


Figure 9.

## Chapter 4. Importing Sample Setup

For testing the PDF Watermarking application, there is a PDF Watermarking Sample package available. This sample package is designed to let end users experiment with Watermarking operations.

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**Warning** This Sample is intended to be used with Out of the Box databases *only*. It makes changes to the Identity structure, creates sample Documents, and uploads files. It should not be applied in a production environment.

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### 1.3 Importing Metadata

The following process imports metadata required for the Watermarking Sample. It includes sample Watermarking configurations.

1. Enable the 'Super User' login to perform this step.
2. Browse to the `\PackageImportExportUtilities\Import\` folder in the Infor PLM Accelerate CD Image and run the Import.exe file

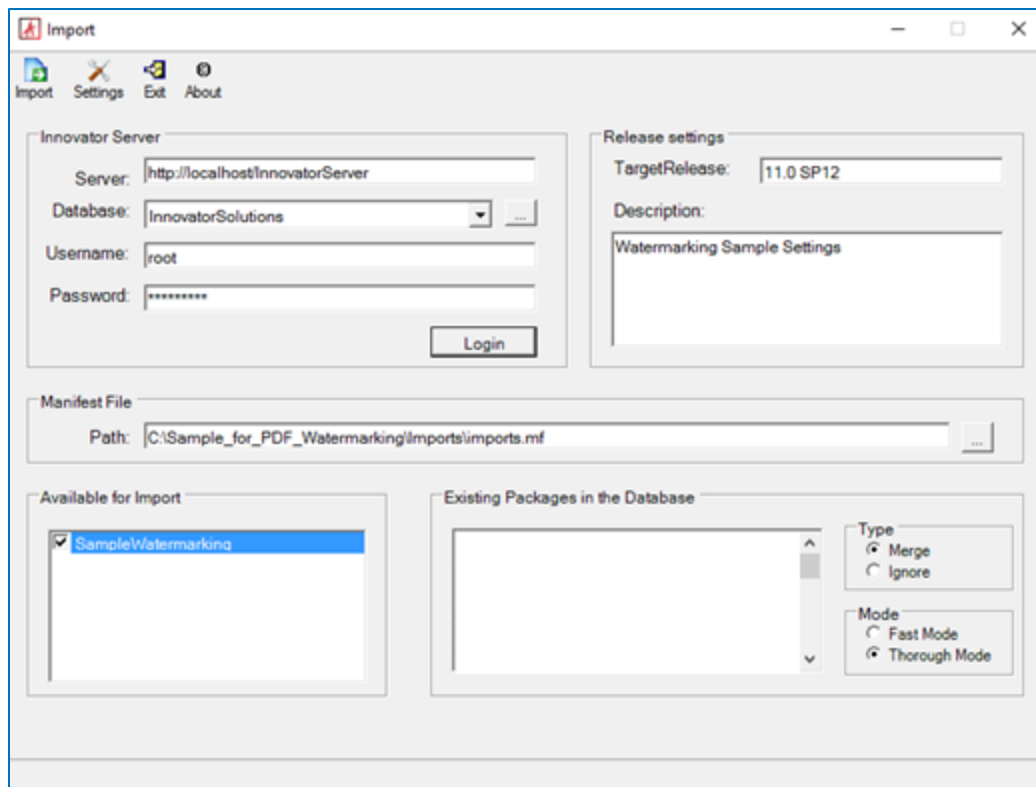


Figure 10.

3. Input the connection information
  - a. **Server** = The connection URL for Infor PLM Accelerate

- b. **Database** = The target Infor PLM Accelerate 11.0 database
  - c. **Username** = root
  - d. **Password** = Password for 'root' login (Default is 'innovator')
  - e. **Target Release** = 11.0 SP12
  - f. **Description** = Watermarking Sample Settings
  - g. **Manifest File Path** = The manifest is found in the unzipped patch folder:  
'\Imports\imports.mf'
  - h. **Available for Import** = Check 'SampleWatermarking'
  - i. **Type** = Select **Merge**
  - j. **Mode** = Select **Thorough Mode**
4. Click **Import** to start the utility.

## 1.4 Loading Data

The following process loads sample data, including sample files, into the database by running BAT scripts.

1. Copy the WMBatch folder into the C:\temp\ directory.

**Note:** The C:\temp\WMBatch\ directory is hardcoded into the scripts.

2. Edit the \Tools\config.xml file to specify the correct Innovator Server URL, Database, and login credentials.

```
<BatchLoader>
  <server>http://localhost/InnovatorServer</server>
  <db>InnovatorSolutions</db>
  <user>root</user>
  <password>innovator</password>
  <delimiter>\t</delimiter>
  <max_processes>1</max_processes>
  <threads>1</threads>
  <lines_per_process>250</lines_per_process>
  <encoding>utf-8</encoding>
  <first_row>1</first_row>
  <log_level>3</log_level>
</BatchLoader>
```

3. Run the 002-Document.bat file.
4. Run the 003-WM.bat file.

## 1.5 Testing the Sample

The following process describes a basic test for the Sample Watermarking process.

1. Log into Infor PLM Accelerate as admin.
2. Navigate to **Documents\Documents** in the TOC and run search for PDF Watermark Document.

3. Right-click the PDF Watermark Document and select **Add Item to Change**.
4. Create a new Express DCO without closing it.
5. In the Signoffs tab, use the **VOTE NOW** options move the Document to **Initial Review**.
6. Navigate back to the PDF Watermark Document item to view the watermark on the file.

If any part of this process fails, Subscribers may contact Infor PLM Accelerate support for assistance at [support@aras.com](mailto:support@aras.com).