



PCC 8.2 for SharePoint 2013 Manual

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jQuery Patch (<http://www.zachstronaut.com/posts/2009/08/07/jquery-animate-css-rotate-scale.html>)
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4821-4982-4268, v. 10

2 Introduction

This section contains the following information:

- About PCC for SharePoint
- Feature Overview
- What's New in PCC for SharePoint
- PCC for SharePoint v8.2
- Supported Versions
- Contacting Accusoft Support
- Accusoft Corporation Copyrights & Trademarks

2.1 About PCC for SharePoint 2013



Prizm Content Connect (PCC) for SharePoint is a preconfigured, high-end document viewer designed to work with the Microsoft SharePoint platform. Offering fast, high-end document viewing without the need to download any additional controls on an end-user machine, Prizm Content Connect is the single viewer you need for all of your content.

Share and collaborate on information throughout the enterprise by allowing your users to access almost any document type, while ensuring information security and control over documents and intellectual property through built-in Digital Rights Management.

Prizm Content Connect for SharePoint's features include:

- View documents from within the search results in SharePoint
- Protect sensitive information through redaction and browser based DRM
- Do more with document collaboration
- View any document or image from your SharePoint repository in a browser window

2.1.1 Feature Overview

PCC for SharePoint features:

View

- View documents stored in SharePoint document libraries
- View documents without downloading and opening on your device
- More than 300 document types are supported

Secure

- Built in Digital Rights Management and redaction
- Control which groups can copy, print, and save documents

Search

- Search document content while viewing

Annotate and Redact

- Mark up and annotate
- Control who can create, view, and modify annotations

2.2 What's New in PCC for SharePoint

This section highlights the new features in the latest PCC for SharePoint release and provides links to more detailed documentation:

2.2.1 PCC for SharePoint v8.2

PCC for SharePoint v8.2 includes the following new or enhanced functionality:

HTML5 Viewer

The HTML5 viewer has replaced Flash, allowing for a wider array of device support.

Enterprise Class Architecture with PCCIS

Scale to any size deployment with best in class service architecture; Prizm Content Connect Imaging Services provides architecture that can serve small deployments and scale to the largest enterprise deployments.

Annotating Document Versions

Prizm annotations are created and saved per version of a document, when versioning is enabled for a Document Library.

Redactions

The ability to perform redactions on a document and then publish the document as a new PDF.

Conversions to PDF

Convert over 300 different file types to PDF.

DRM Enforcement

The ability to download or send a document using Ribbon and ECB actions is blocked when DRM permissions for the user do not permit the user to save or send the document.

Using SharePoint Designer with DRM

SharePoint Designer can be used by privileged users when DRM is enabled for a web application.

Using Windows Explorer View with DRM

Access to a Document Library by privileged users is uninhibited when DRM is enabled for a web application.

Revamped Configuration Pages

Configuring your PCC for SharePoint installation has been never been easier with a completely redesigned, intuitive interface that has a familiar SharePoint look and feel. It is now simple to configure Digital Rights Management at a Site Collection, Web Application, or more granular level. PCC for SharePoint now also includes Annotation rights management as part of the DRM solution.

Improved Multi-Server Support

As part of the configuration improvements, global settings required to support multi-server installs have been included and can easily be managed in the configuration interface. You are no longer required to edit source code or configuration files to set up a multi-server environment.

2.3 Supported Versions

2.4 Contacting Accusoft Support

For information about Accusoft Support, please refer to the Software Support and Maintenance Policy on the Accusoft web site or call Accusoft at 813-875-7575.

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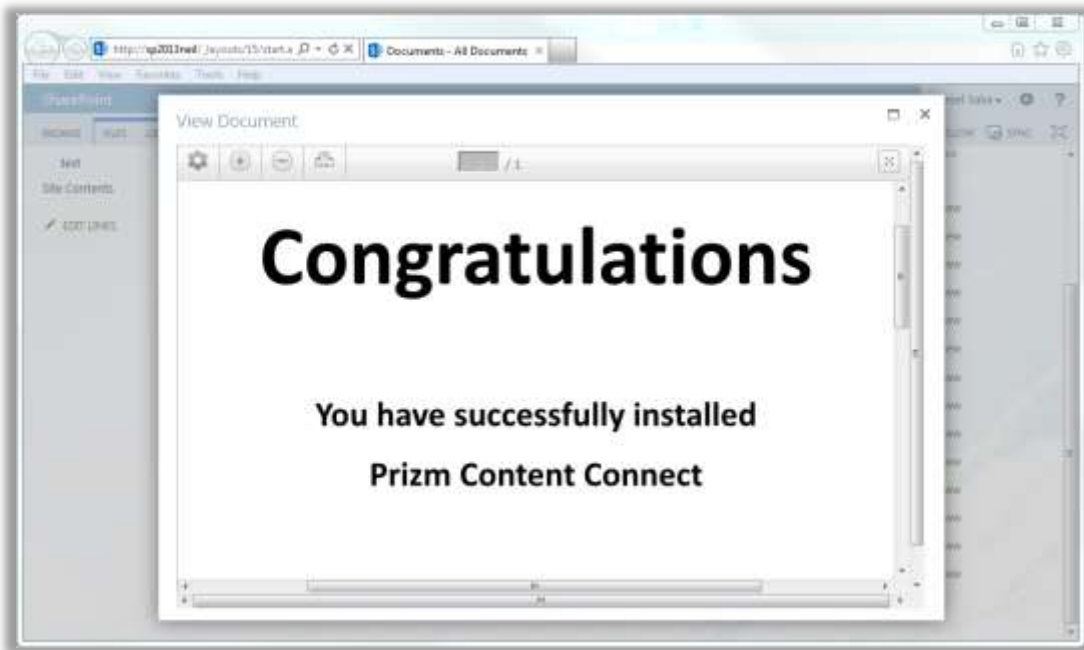
3 Features, Components & Architecture

The overview section is a summary of the features and components of PCC for SharePoint and how they interact.

3.1 Feature Overview

Prizm Content Connect for SharePoint offers three major feature sets out of the box: document viewing, Digital Rights Management (DRM), and document annotation.

Document viewing is a feature set that permits an end user to view documents which are stored in SharePoint, without having to download the original document. Documents are viewed directly in the user's web browser. Furthermore, document viewing does not require the end user to download and install any additional software on their device.



Digital rights management (DRM) is a feature set that builds on top of document viewing. With DRM, a user can view a document in their web browser, but the user will be limited (based on their permissions) in their ability to copy, save, or print the content of the document.

Document annotation is another feature that builds on top of document viewing. With document annotation, a user can create and save annotations on any viewable document. These annotations can later be viewed by other users.

3.2 Product Architecture Overview

Prizm Content Connect (PCC) for SharePoint is made of two high level components. These two high level components together provide all of the functionality that is required for document viewing, Digital Rights Management, and other functionality of PCC for SharePoint. Both components must be installed and configured for a proper functioning deployment of PCC for SharePoint.

The figure below shows how the Prizm Content Connect for SharePoint product is made of two high level components, PCC for SharePoint Integration and Prizm Content Connect:



Prizm Content Connect

Prizm Content Connect is a standalone product that exposes a set of web services, these web services are referred to as the Prizm Content Connect Imaging Services (or just PCCIS). Prizm Content Connect must be installed within your organization as part of the PCC for SharePoint installation. PCCIS performs document conversion.

PCC for SharePoint Integration

The PCC for SharePoint Integration is a farm solution for SharePoint 2013, which provides functionality that modifies SharePoint to permit document viewing, rights management, configuration, and document annotation. PCC for SharePoint Integration utilizes PCCIS for document conversion.

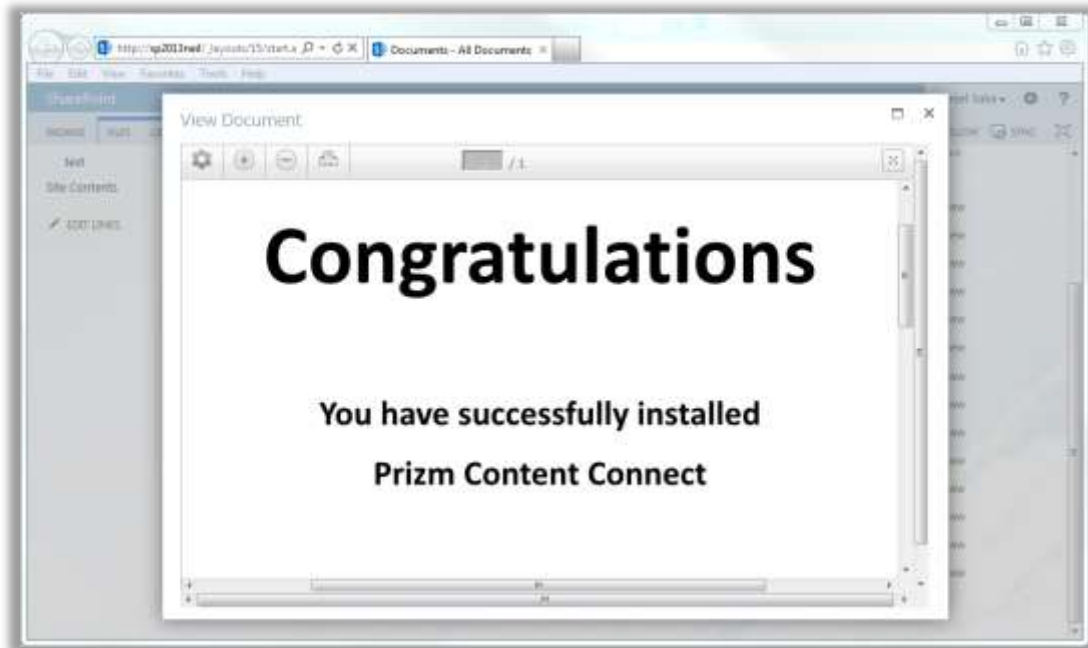
Prizm Content Connect for SharePoint Installers and Downloads

Prizm Content Connect for SharePoint is packaged and delivered to you as a solution package (Accusoft.Pcc.SharePoint.wsp) file. This solution package is used to install and deploy PCC for SharePoint Integration to your SharePoint 2013 farm.

3.3 Document Viewing Overview

The document viewing feature set in PCC for SharePoint offers the end user the ability to view documents that are stored in SharePoint document libraries. Documents are viewed in the user's web browser, which means that the end user does not need to download the original document or have a client application on their device that can open the document for viewing.

For example, a Microsoft Word document is viewed in the web browser:



3.3.1 Integrating Document Viewing

The document viewing feature set in PCC for SharePoint offers the end user the ability to view documents that are stored in SharePoint document libraries. Documents are viewed in the user's web browser, which means that the end user does not need to download the original document or have a client application on their device that can open the document for viewing.

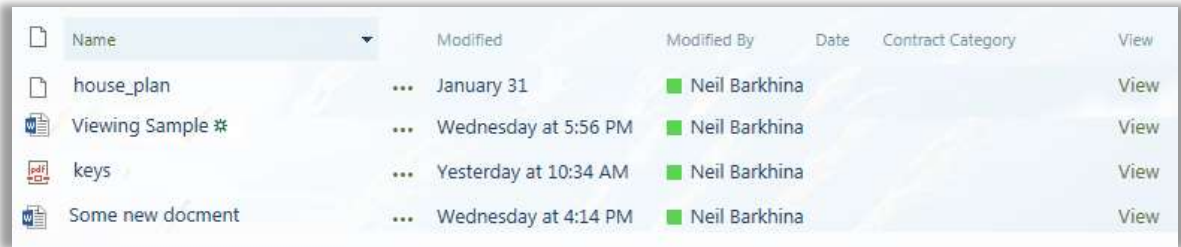
There are several different ways that document viewing can be integrated into SharePoint.

Previewer

The simplest, least-invasive means of viewing a document is through adding a Preview column to a document library. This column presents the user with a link to view the document in a pop up without leaving the page.

Example 1

The figure below shows a document library with a preview column added (the right most column). For each row, the "View" link will open the document in a pop up for viewing:



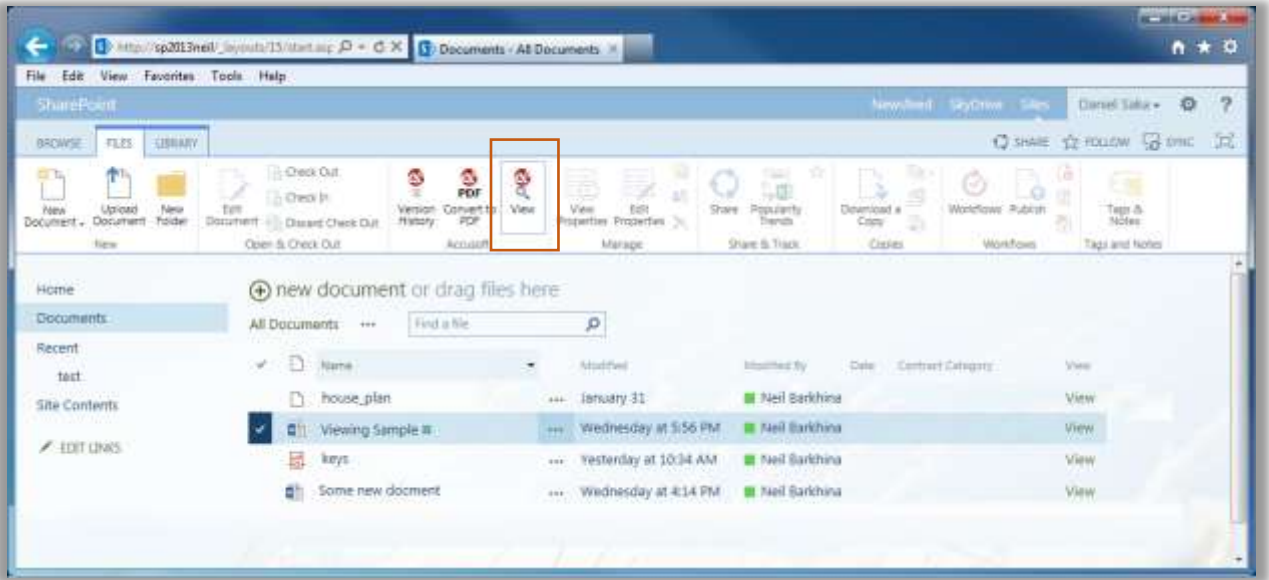
Name	Modified	Modified By	Date	Contract Category	View
house_plan	January 31	Neil Barkhina			View
Viewing Sample #	Wednesday at 5:56 PM	Neil Barkhina			View
keys	Yesterday at 10:34 AM	Neil Barkhina			View
Some new document	Wednesday at 4:14 PM	Neil Barkhina			View

The View Button

The view button is new functionality with Sharepoint2013, embedded in the ribbon and allows you to view the document in a new tab. It can be easier to use than the Previewer for users running PCC on a tablet.

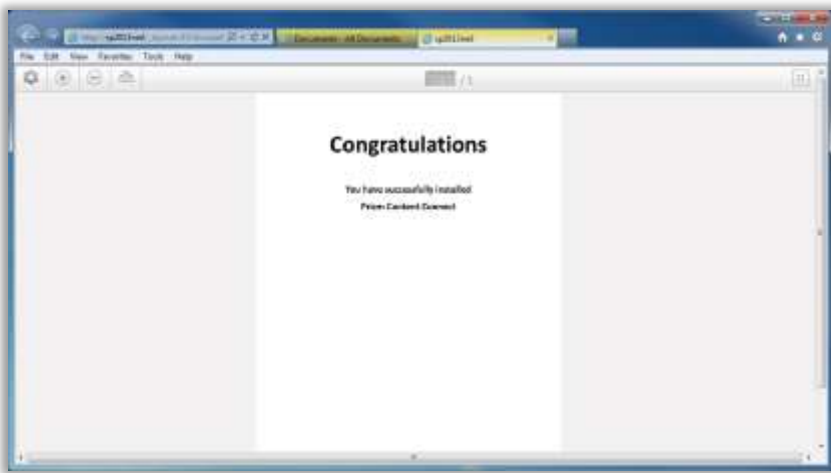
Example 2

The figure below shows how to activate the View button. First select a document and click on View:



Example 3

The figure below shows viewing a document in a new tab:



Redirector

The Redirector is a component of the Digital Rights Management feature set. The redirector intercepts a direct request for a document and redirects the web browser to a page in the web tier for viewing the document.

For more information about the Redirector see the DRM Components & Architecture Overview section.

3.3.2 Web Tier

The core component of document viewing in PCC for SharePoint is the web tier. The web tier is composed of a web page, several web services, and a viewer. ViewDocument.aspx is a SharePoint Application page that displays a specified document using the PCC Flash viewer. This page is used in all document viewing; it is used by the Previewer, Redirector, and custom integrations. The web services of the web tier support ViewDocument.aspx and the Flash viewer. These web services are not intended to be called directly in any custom integrations.

Web Tier Public API

The web tier's public API permits viewing documents. The public API consists of a single member, which is the ViewDocument.aspx page. For more information, see the section on Calling the API Directly.

PCC HTML5 Viewer

The PCC HTML5 viewer is a document viewer. This component of the web tier renders documents for viewing in the end user's browser. In addition to viewing, the HTML5 viewer permits document navigation, text searching, thumbnail views, saving, printing, text selection, annotations, and redaction among other things.

The HTML5 viewer requires a SVG or PNG encoded rendition of a document. It requests this rendition by calling into the web services of the web tier. The HTML5 viewer can render vector or raster content that is contained in the SVG or PNG encoded document.

3.3.3 Tempcache

The tempcache is a directory that is used for sharing files between the PCC for SharePoint Integration and the Prizm Content Connect Services. Files in the tempcache are written and modified by both the web tier and PCCIS.

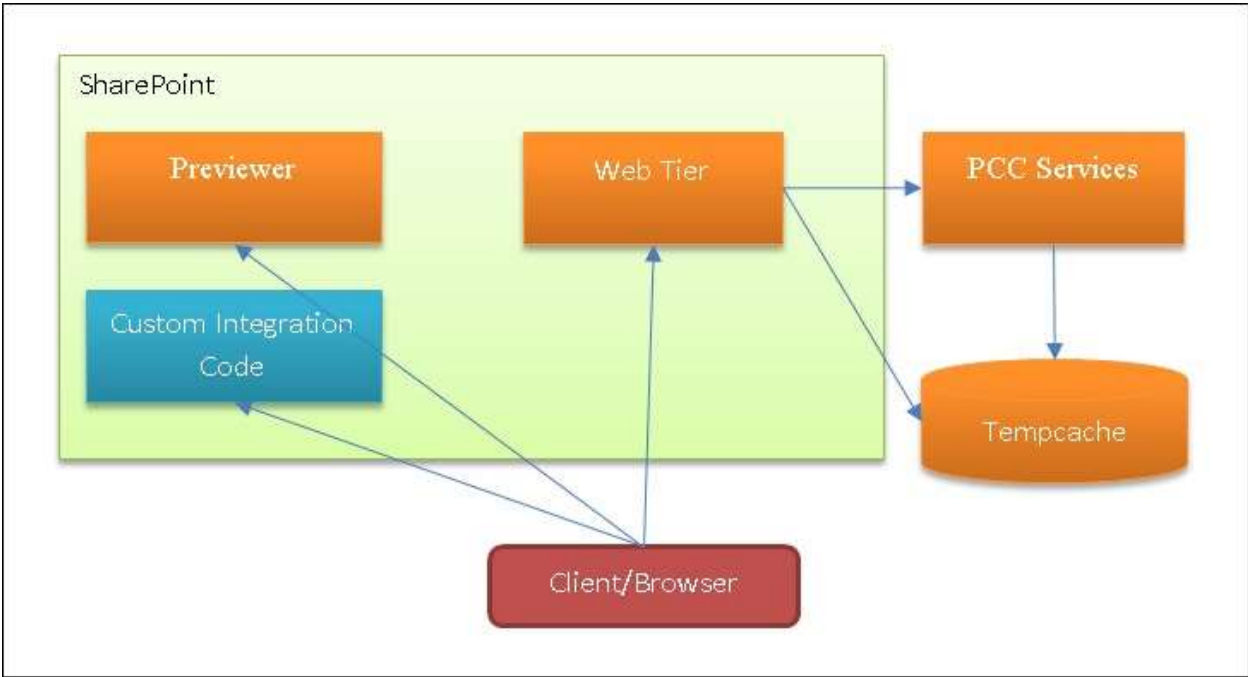
A correctly configured tempcache is critical to proper functioning of document viewing and security of the PCC for SharePoint deployment. The integrator should take proper care to ensure that permissions of the tempcache folder are set to permit read and write by the web tier and PCCIS, and also to ensure that permissions are set to prevent unauthorized access.

3.3.4 Prizm Content Connect Services

Prizm Content Connect services are a critical part of document viewing. As discussed in the section Product Architecture Overview, Prizm Content Connect services are part of Prizm Content Connect, which is a standalone product that is installed separate from the PCC for SharePoint Integration. Prizm Content Connect Services include the ProxyServer (on port 18680 by default) and Prizm Content Connect Imaging Services (PCCIS on port 18681 by default).

3.3.5 Architecture Diagram

The example below shows at a high level how the components interact to implement document viewing functionality:

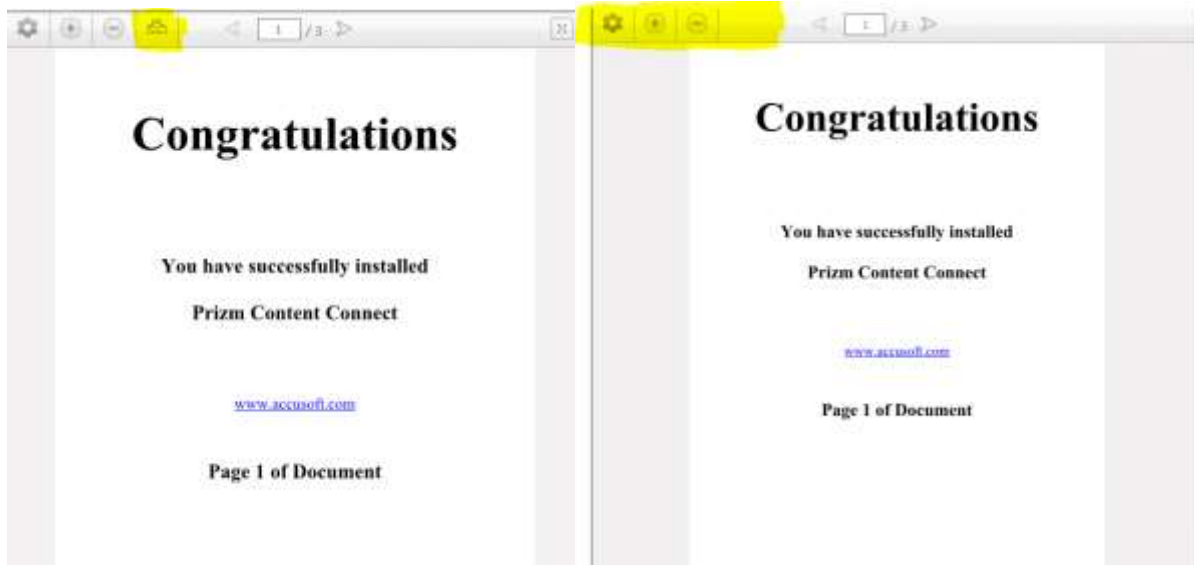


3.4 Digital Rights Management Overview

The Digital Rights Management (DRM) feature set in PCC for SharePoint builds on top of document viewing and restricts an end user's ability to duplicate the content of a document. Through DRM, the SharePoint administrator controls what permissions a user has when viewing a document. This includes specifying whether a user can print a document, save a document, or copy contents of a document.

The following example shows two viewers side-by-side:

- The left viewer is not enforcing any DRM permissions and the right viewer is enforcing DRM permissions.
- The right viewer is missing the save, print, and select text (copy) button in the menu bar.



DRM in PCC for SharePoint can only enforce these permissions when viewing the document in the PCC viewer. DRM cannot enforce rights management permissions if a user has a copy of the original document on their computer. Therefore it is imperative for the SharePoint administrator to configure the SharePoint document library or site to prevent the end user from downloading the original document, and instead, only allow the user to open the document for viewing in the PCC viewer.

3.4.1 The Redirector

PCC for SharePoint offers a component to help the administrator prevent users from downloading the original document. This component is called the HttpRedirector, or just the "Redirector". When installed for a SharePoint web application, the Redirector will intercept requests for rights managed documents and redirect the request to an application page that

permits the end user to view the document in the PCC viewer. This page, or specifically the viewer within this page, will enforce the DRM permissions that the user is granted for the document.

Redirection of a request for a document is demonstrated in the examples below:

Example 1

The browser will send the request to get this document:

```
http://testPCC/AccusoftPCC/Shared%20Documents/2-%20MS%20Office%20Documents/Sample.doc
```

Example 2

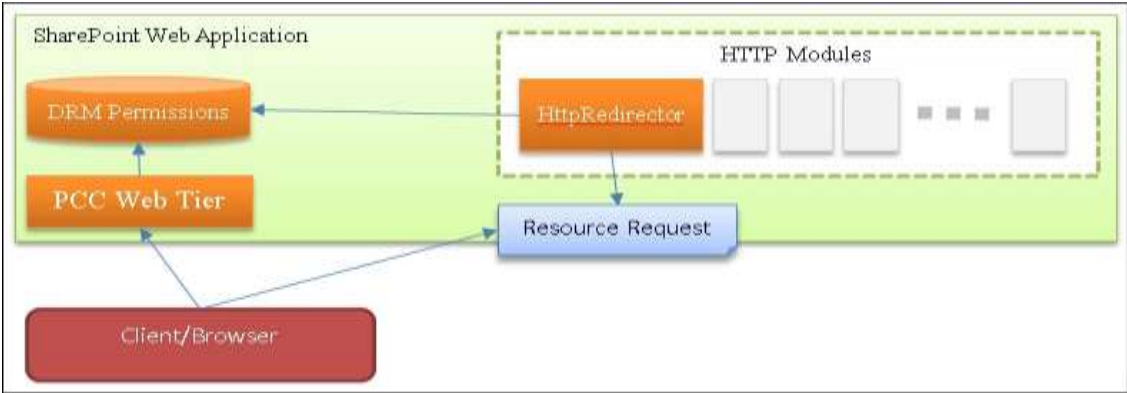
The request from Example 1 (above) was redirected by the Redirector to the URL as shown in this browser:

```
http://TestPCC/AccusoftPCC/_layouts/15/Accusoft/Prizm/ViewDocument.aspx?documentIdentifier=http%3a%2f%2fwin-pcr64lqgorc%2fsites%2fAccusoftPCC%2fShared+Documents%2f2-+MS+Office+Documents%2fSample.doc
```

The Redirector is an HTTP Module, which is installed to each web application when the Prizm Digital Rights Management web application feature is activated. During the activation of this feature, changes are made to the web application’s web.config file, which installs the Redirector for the web application. Upon deactivation of the Prizm Digital Rights Management web application feature, the Redirector is un-installed for the web application.

Example 3

When the Prizm Digital Rights Management web application feature is activated, requests for resources are monitored by the HttpRedirector. If the redirector sees a request for a DRM protected resource, then it redirects the request to a page for viewing the resource:



3.5 Configuration Overview

Prizm Content Connect for SharePoint has two types of configurable settings. These settings either fall under the category of end user permissions or global settings. End user permissions include Digital Rights Management permissions and annotations permissions. Global settings control the interaction of behind the scenes components that implement document viewing.

Configuration of End User Permissions

There are three important characteristics of end user permissions that effect configuration:

End user permissions are hierarchical - They can be set at the SharePoint site level and they will apply throughout the site. However, these settings can be overridden at the document library level, permitting a different configuration and behavior of DRM and annotations for individual document libraries.

End user permissions are applied to groups – They can be set for each SharePoint group. This allows different groups to have different permissions for various actions. For example, a moderator group may have permissions to save or copy documents, but a view-only group would not have permissions to save, copy, or print documents.

End user permissions can me modified by a user with the Manage Lists base permission – An end user that has the Manage Lists base permission will be able to modify end user permissions. User's with this base permission are typically site owners and designers. There may be a scenario where a user has the Manage List permission for a specific document library, but not for a site. In this case, the user will be able to set end user permissions for the document library but not the site.

What are the Configurable Permissions?

Some of the configurable permissions relate to Digital Rights Management and others relate to annotations. The configurable permissions are described below.

Digital Rights Management Permissions

Enable DRM

The ability to save or send a document. A save button is included in the toolbar of the PCC Viewer.

There are SharePoint ribbon buttons and ECB menu items for downloading a copy of a document, sending the document to another location, or creating a document workspace. If DRM is enabled for a user, the DRM redirector will block the user from accessing the SharePoint functionality (a SharePoint error page will display).

Copy

The ability to copy document content. A copy button is included in the toolbar of the PCC Viewer.**Print**

The ability to print a document. A print button is included in the toolbar of the PCC Viewer.

Annotation Permissions

Save/Load

The ability to load and save annotations or redactions. When a user opens a version of a document, any annotations saved for that version (of the document) are loaded when the document loads in the PCC Viewer.

The annotations are saved and are associated with the version of the document currently being viewed.

Annotations

The ability to access the annotation toolbar:

The PCC Viewer annotations toolbar will be accessible if the user has Annotation permission.

Redactions

The ability to access the redaction toolbar.

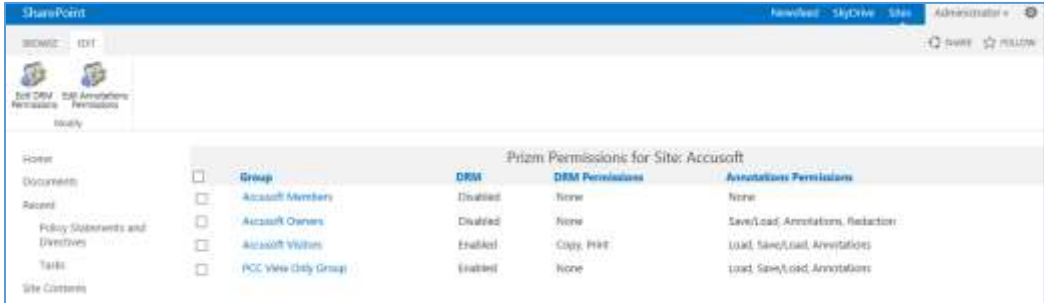
How are Permissions Configured?

Permissions are controlled through two nearly identical SharePoint application pages.

The first application page is the Prizm Site Permissions page. This page permits configuration of DRM and annotations permissions, which apply throughout the site.

Example 1

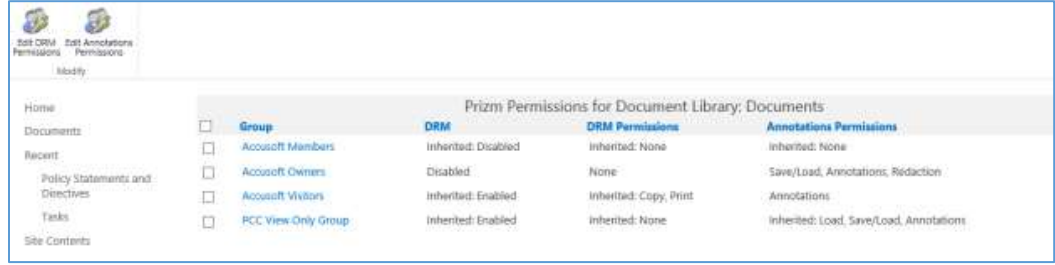
The Prizm Site Permissions page:



The second application page is the Prizm Library Permissions page. This page permits configuration of DRM and annotations permissions that apply to a specific document library. Setting permissions with the Prizm Library Permissions page will override permissions for the document library, which were inherited from the site.

Example 2

The Prizm Library Permissions page:



		Prizm Permissions for Document Library: Documents		
	Group	DRM	ORM Permissions	Annotations Permissions
<input type="checkbox"/>	Account Members	Inherited: Disabled	Inherited: None	Inherited: None
<input type="checkbox"/>	Account Owners	Disabled	None	Save/Load, Annotations, Redaction
<input type="checkbox"/>	Account Visitors	Inherited: Enabled	Inherited: Copy, Print	Annotations
<input type="checkbox"/>	PCC View Only Group	Inherited: Enabled	Inherited: None	Inherited: Load, Save/Load, Annotations

Configuration of Global Settings

Global settings apply to PCC for SharePoint throughout the entire SharePoint farm. These settings affect how the behind the scenes components work together to implement document viewing. Global settings include the hostname and port of the PCC legacy services and PCCIS services, and the location of the tempcache folder.

Configuration of these setting can be done by a farm administrator using the Prizm Global Configuration page. This is an admin page that is deployed to SharePoint Central Administration.

Example - Global Configuration

The Prizm Global Configuration page:



Prizm Global Configuration

Control Administration

- Application Management
- System Settings
- Monitoring
- Backup and Restore
- Security
- Upgrade and Migration
- Service Application Settings
- Apps
- Configuration Wizards
- Site Contents

PCC Service

Web service URL from Content Connector for Document Library administration with the PCC Service.

Note: Refer to the installation guide for a walkthrough of installing and configuring the PCC Service.

Search Service Path

Web Service Scheme

Web Service

Web Service Path

Tempcache Location

4 Upgrading from Previous Versions

Note that previous versions of Prizm Content Connect for SharePoint supported SharePoint 2010 and below while PCC v8.x is for SharePoint 2013; as such there are no direct upgrade utilities as the entire farm needs to migrate. Please contact Accusoft's Sales Department using sales@accusoft.com if you would like to facilitate the migration of previous annotations from a legacy version of PCC for SharePoint.

5 Installation Guide

When Installing Prizm Content Connect on a Separate Server from SharePoint:

- Minimum 2GB RAM (Recommended 4GB+ RAM)
- 450 MB of free disk space Operating System:
- Windows Server 2003 R2 (32-bit & 64-bit) Windows Server 2008 (32-bit & 64-bit)
- Windows Server 2008 R2 (32-bit & 64-bit)
- Windows Vista (32-bit & 64-bit) Windows 7 (32-bit & 64-bit)
- Single-Server Topology
- When installing Prizm Content Connect on the same server as SharePoint:
- 450 MB of free disk space

Prizm Content Connect places no other additional requirements on top of the SharePoint 2013 requirements.

PCC for SharePoint Integration

When deploying the PCC for SharePoint Integration to a SharePoint Farm, the primary requirement for installation is the presence of a supported SharePoint installation. All of the other requirements in this section come from SharePoint:

- SharePoint
 - SharePoint Foundation 2013 with Service Pack 1
 - SharePoint Server 2013 (Standard or Enterprise)
 - SharePoint Server 2013 (Standard or Enterprise) with Service Pack 1
- Web Server
 - IIS 7 and above
 - SharePoint Web Applications running in the Integrated Pipeline Mode
- Operating System
 - Windows Server 2008 with SP2 64-bit
 - Windows Server 2008 R2 64-bit
 - Windows Server 2008 R2 with SP1 64-bit
 - Windows Server 2012
- Hardware
 - 8GB ram for medium size production system Client

The following requirements permit PCC for SharePoint to function correctly for the end user:

Note that your use of various features of SharePoint may further restrict the list of supported browsers.

Browser Compatibility:

- Internet Explorer 8, 9, 10
- Chrome 24+
- Firefox 18+

5.2 Required Permissions

Users who install, configure, and manage the PCC for SharePoint product will need different permissions to perform various actions. Below is a list of actions that can be performed and the permissions required to perform each action.

Installing using PowerShell

Installation of PCC for SharePoint using PowerShell requires:

- User is a farm administrator.
- User is an administrator on the local machine.
- User is a shell administrator. See Microsoft documentation for Add-SPShellAdmin.

Configuring Global Settings

Through Central Administration you can configure global settings for PCC for SharePoint. This includes settings such as the location of the tempcache folder. Permissions required:

- User is a farm administrator.

Activate Prizm Digital Rights Management Feature

Through central administration you can activate and de-activate the Prizm Digital Rights Management feature for any web application in the farm. Permissions required:

- User is a farm administrator.

Activate Prizm Configuration Tools Feature

In the site settings of the root web of a site collection, you can activate and de-activate the Prizm Configuration Tools feature for a site collection. Permissions required:

- User is a site collection administrator.

Control DRM and Annotation Permissions

Site and list owners (and also designers) can modify DRM and Annotations permissions. Permissions required:

- User has “Manage Lists” permission for a library – allows the user to override DRM and Annotations permissions for a document library.
- User has “Manage Lists” permissions for a site – allows the user to set DRM and Annotations permissions that will be used in document libraries throughout the site.

5.3 Planning Your Install – Step 1

When planning your installation of PCC for SharePoint you will need to answer the following questions. The answers you give will effect the route you take for installation.

What is my target server topology?

- Am I installing to a standalone SharePoint server?
- Am I installing to a SharePoint farm that has one or more servers?
- Do I want to install PCCIS on a separate server from SharePoint?

What is my preferred method of deploying SharePoint solutions and activating features?

- Do I want to deploy and activate using GUI tools?
- Do I want to deploy and activate using command line tools (PowerShell cmdlets)?

What viewing and rights management behavior do I want to implement?

- Do I want to enforce an additional level of rights management for my documents?
- Do I want to allow users to view documents, but prevent users from copying, saving, or printing documents?
- Do I want document previewing?
- Do I want to provide users with a link to view a document in the browser?
- Do I want to view documents that are found in search results?
- Do I want to implement custom behavior for viewing my documents?
- Do I want to browse a document library and be able to preview documents in another panel on the same page?

5.3.1 Your Target Server Topology

Knowing your target server topology is a key step you will need to make before beginning installation and configuration of PCC for SharePoint. The steps you will take for installation and configuration are different based on your server topology. In some cases you will have a choice regarding the server topology you want, but in many cases this will be decided by your existing SharePoint deployment.

If you are going to test PCC for SharePoint in a development or testing environment, you should test in an environment with a similar topology.

This section contains the following information:

- Installing to a Single Server Topology

- Installing to a Multi-Server Topology

5.3.1.1 Installing to a Single Server Topology

When installing PCC for SharePoint to a single-server topology, SharePoint 2013, Prizm Content Connect services, and the Prizm Content Connect for SharePoint integration code will each be installed on the same server. Instructions in the Single-Server Install Guide cover the installation steps for all supported single-server topologies.

If the target server topology is a single-server topology, it is recommended that SharePoint 2013 is installed as a standalone installation; a standalone installation of SharePoint 2013 does not allow the addition of machines to create a SharePoint farm.

It is possible to have a single-server topology where you install SharePoint as a single-server farm rather than as a standalone install.

However, consider whether you could be adding more than one SharePoint server to this farm in the future. If you could be adding another SharePoint server to this farm, you should deploy as a multi-server topology where there is one server hosting SharePoint and one server hosting Prizm Content Connect services. Using this multi-server topology will permit the addition of SharePoint servers to the farm without changes to PCC for SharePoint.

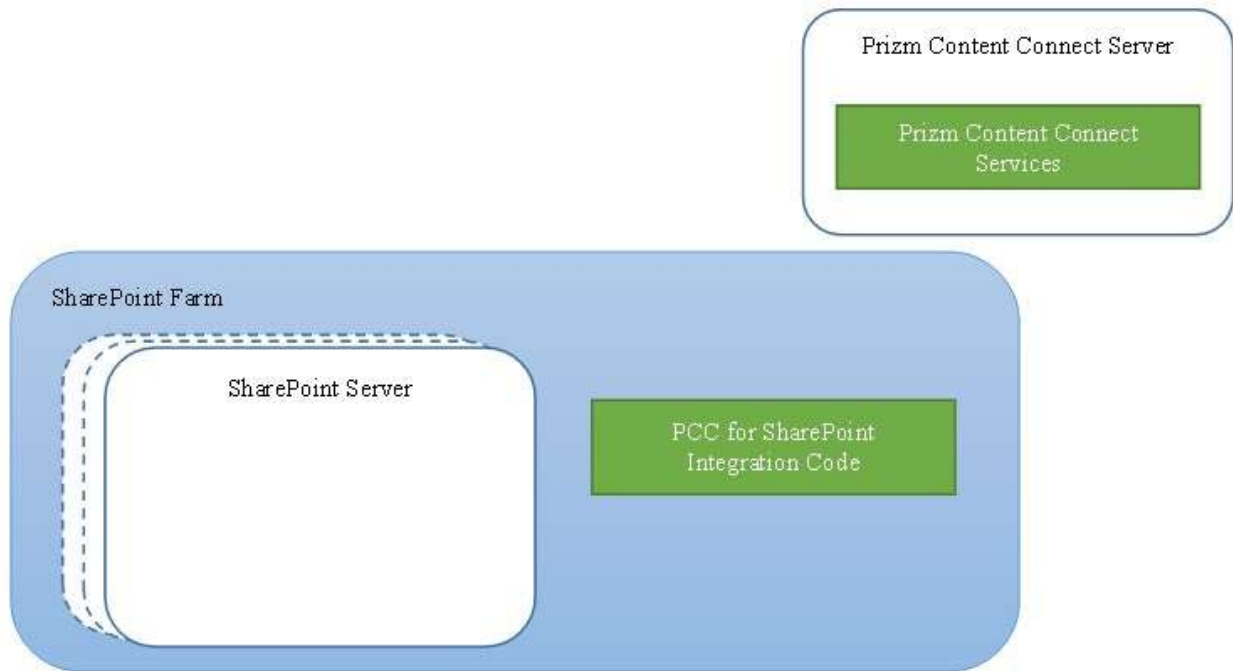
5.3.1.2 Installing to a Multi-Server Topology

PCC for SharePoint supports a variety of multi-server topologies as of the 7.0 release. In each of the supported topologies, there are one or more servers hosting the SharePoint farm and there is only one server hosting Prizm Content Connect services.

Instructions in the Multi-Server Install Guide cover the supported multi-server topologies.

In the simplest multi-server topology, SharePoint may be installed on a single server and Prizm Content Connect services are installed on a separate server.

More complex multi-server topologies consist of a SharePoint server farm containing more than one server. The roles of the servers in this SharePoint farm are not important for this document. What is important is that in the multi-server topology, Prizm Content Connect services will be installed only on one server. This single Prizm Content Connect server will serve all requests for document conversion that come from any server in the SharePoint farm.



5.3.2 Method of Deploying SharePoint Solutions

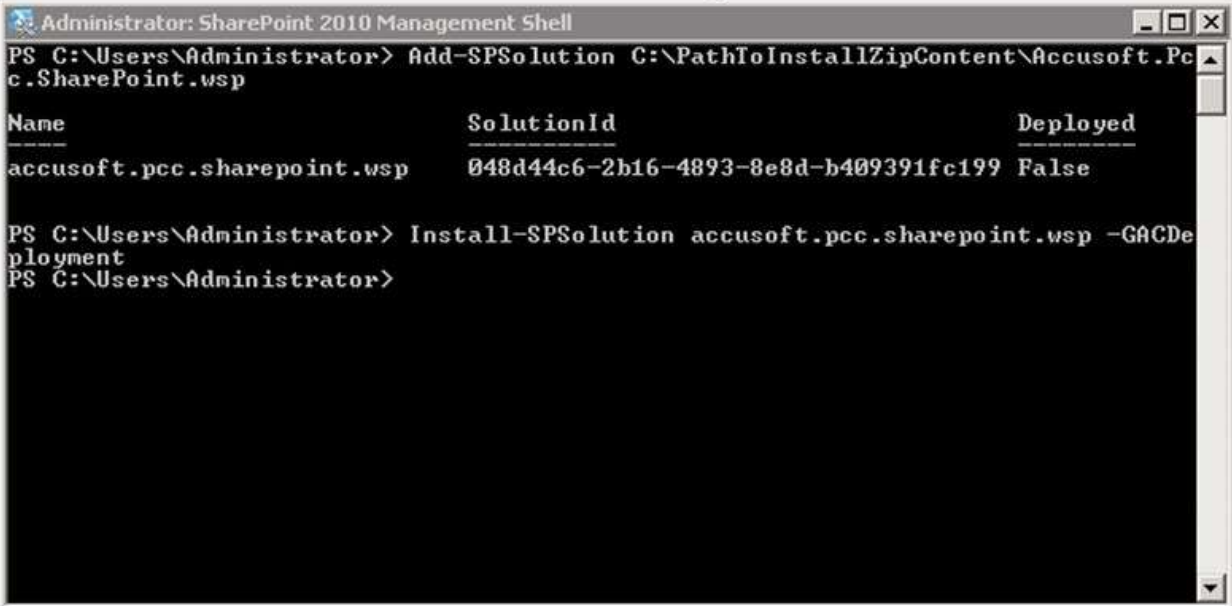
PCC for SharePoint supports deploying via a the SharePoint Administrative Console.

5.3.2.1 Command Line Based Installation

The command line based install method makes use of the SharePoint 2013 Management Shell. The installation guide for this install walks you through adding the PCC for SharePoint solution to the solution store, deploying the solution to the farm, and activating features on web applications and site collections.

Example

The figure below shows the first two steps of installing using PowerShell cmdlets:



```
Administrator: SharePoint 2010 Management Shell
PS C:\Users\Administrator> Add-SPSolution C:\PathToInstallZipContent\Accusoft.Pcc.SharePoint.wsp

Name                               SolutionId                           Deployed
-----                               -
accusoft.pcc.sharepoint.wsp        048d44c6-2b16-4893-8e8d-b409391fc199  False

PS C:\Users\Administrator> Install-SPSolution accusoft.pcc.sharepoint.wsp -GACDeployment
PS C:\Users\Administrator>
```

5.3.2 Choosing Viewing & Rights Management Behavior

PCC for SharePoint permits implementation of several different behaviors for the end user. The product can be used to assist in rights management for specific groups, it can allow preview of documents in a library, it can allow viewing of documents in search results, and it can allow custom integration of viewing documents.

In a deployment of PCC for SharePoint to a standalone SharePoint server or to a SharePoint server farm you can configure PCC for SharePoint to offer one or more of these behaviors to the end user. When configuring these behaviors, you can be as specific as the Document Library; and therefore two document libraries in the same site may offer different viewing or rights management functionality.

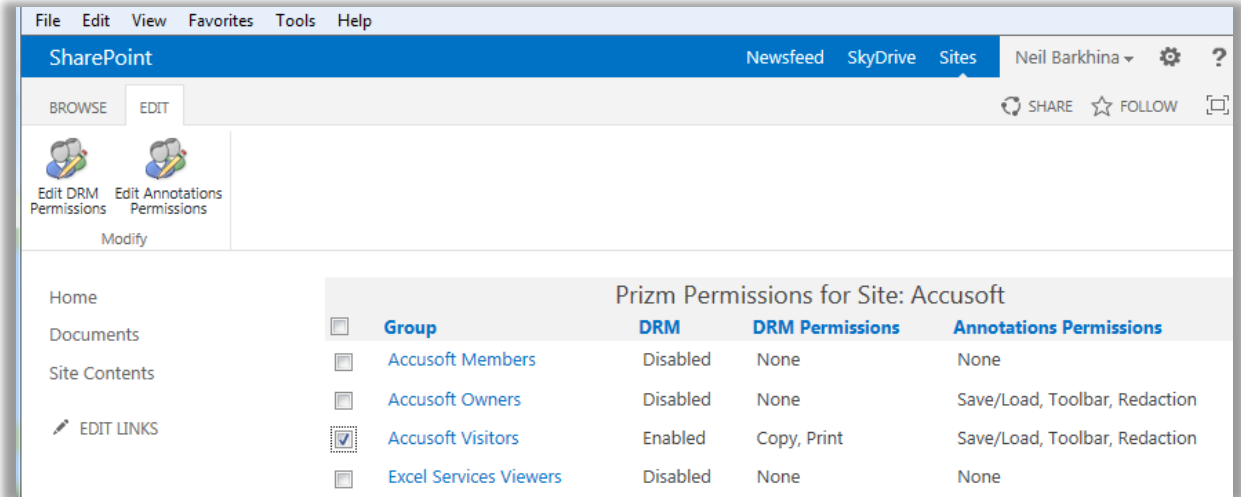
5.3.2.1 Digital Rights Management (DRM)

If you wish to allow end users to view documents, but you want to prevent select groups from saving, copying, or printing documents, PCC for SharePoint can be used to implement this behavior in a document library.

PCC for SharePoint offers an interface where you can specify permissions (rights) that you want to give to individual groups. PCC for SharePoint will enforce these permissions when a user views the document in the PCC viewer. Furthermore, PCC for SharePoint will prevent the user from downloading the original document through a direct link to the document, such as through clicking the name of the document in the Document Library. Instead of downloading the document, the user will be redirected to view the document in the browser.

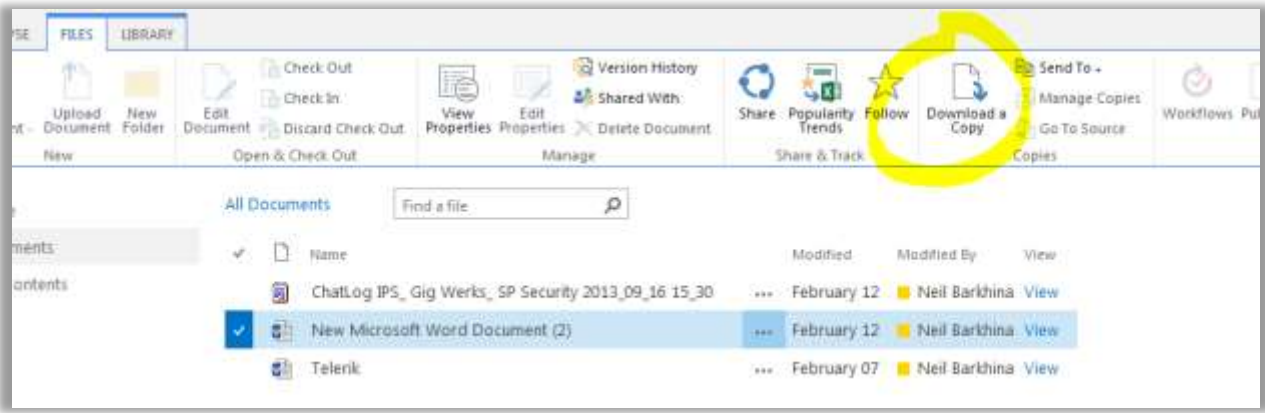
Example 1

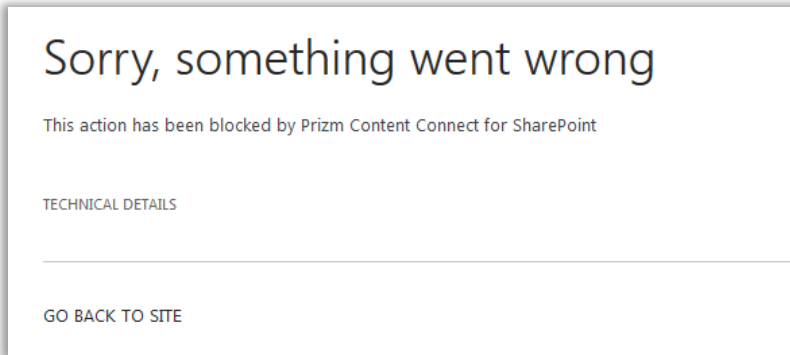
The figure below shows the interface that is used to configure DRM permissions:



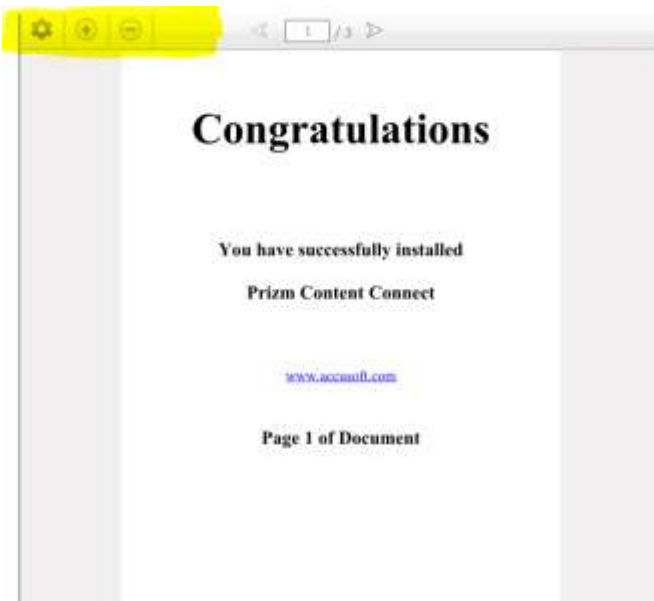
Example 2

The figures below show the viewer enforcing DRM permissions. This particular user only has permission to print, and they do not have permissions to save the document or select and copy content from the document:





DRM has been enabled in the above example when trying to download.



Printing has been disabled with DRM enabled in the above example

5.3.3.2 Document Preview in Browser

PCC for SharePoint offers several means of in-browser viewing of documents stored in SharePoint. The simplest, least-invasive means of viewing a document is through adding a Preview column to a document library. This column presents the user with a link to view the document in a lightbox without leaving the page. To add a preview column to a document library, see the Configuring the Previewer section.

5.3.3.3 Viewing Documents in Search Results

If SharePoint search results contain a direct link to a document, then that document can be viewed by clicking on the search result.

Enabling viewing of search results is done indirectly, as there is no switch to specifically enable viewing of search results. Search results can be viewed in PCC if DRM is enabled for the document in the search result. To configure this, refer to the Configuring DRM section.

5.3.3.4 Custom Integration of Viewing with PCC

The PCC for SharePoint product can be used for viewing documents in SharePoint in additional ways. Two suggested custom integrations are shown below, but you may find another approach that meets your needs. To perform custom integrations, you will need to call the API directly, as described in the Calling the API Directly section.

Creating a link that opens the document in the PCC Viewer – you can create link text that will open any document in the PCC Viewer.

5.4 Installing PCC – Step 2

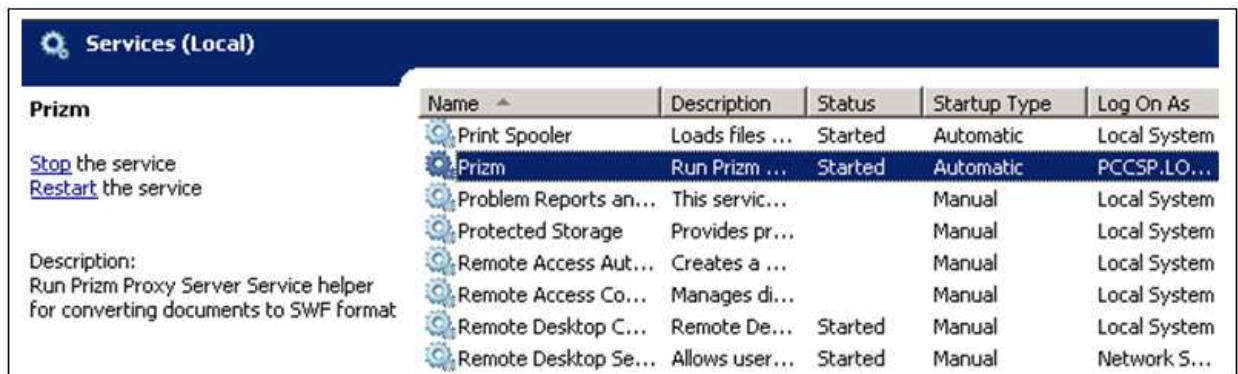
5.4.1 Evaluation Licensing

Please refer to the Prizm Content Connect help file for detailed installation instructions at <http://www.accusoft.com/manuals.htm>.

5.4.1 One Time Only Configuration for PCC in a Multi-Server Farm

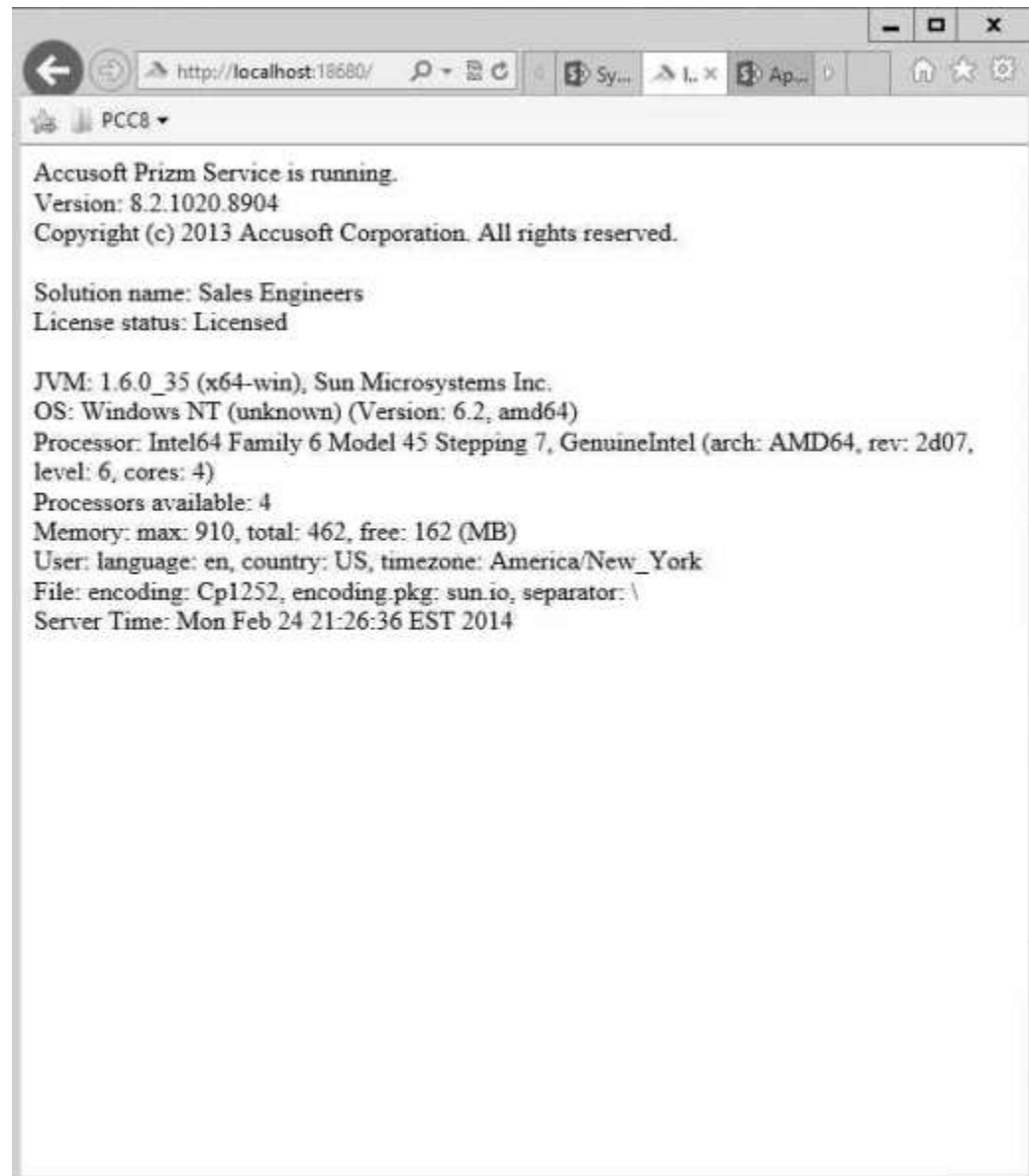
In this walkthrough we will configure the Prizm Content Connect Services to support document conversion requests in a multi-server farm.

1. On the Prizm Content Connect Server, open the Prizm conf folder. Find this folder in the installation directory of Prizm Content Connect. If you chose the default install location, this would be C:\Prizm\conf.Open proxyserver_jar.properties for editing.
2. Modify the value of the all entries of localhost to match the host name or IP address of this machine that you are referencing in SharePoint Central Administration.
3. Save and close proxyserver_jar.properties.
4. Open Start > Administrative Tools > Services.
5. Find and restart the Prizm service:



6. Configure the firewall(s) to allow incoming requests for PCCIS. By default the PCCIS receive requests on port 18680 and 18681. You will need to open any firewalls so the PCCIS can accept inbound requests on ports 18680 and 18681. Since instructions vary depending on firewall implementation, you will need to determine the appropriate steps for your firewall.
7. Test access to the PCCIS from another machine by opening

<http://pcc.mydomain.com:18680>



in a web browser. You should do this from a separate machine on the network, not the PCC Server. You will need to replace "pcc.mydomain.com" with the host name or IP from Step 3 above.

5.5 Step 3 - Installing PCC for SharePoint

5.5.1 Single-Server Install Guide

This section will guide you through installing Prizm Content Connect for SharePoint on the same server as a standalone SharePoint installation.

If you desire to support a multi-server SharePoint farm or if you desire to install Prizm Content Connect on a separate server from SharePoint, please use the Multi-Server Install Guide.

5.5.1.1 Installation using PowerShell

This installation guide will provide you (an experienced SharePoint administrator) with sufficient information to add, deploy, and activate the Prizm Content Connect for SharePoint product using PowerShell cmdlets. After installation, you will need to follow the initial configuration steps in the Configuration Guide.

To install PCC for SharePoint, follow these steps:

1. Download the PCCForSharePoint.zip file from Accusoft.com.
2. Save the PCCForSharePoint.zip file anywhere on the SharePoint server and extract zip file to: C:\<path_to_install_zip_content>\
3. Open the SharePoint 2013 Management Shell:

SharePoint 2013 Products > SharePoint 2013 Management Shell

4. Add the solution to the solution store:

PowerShell Code:

```
# Add-SPSolution C:\<path_to_install_zip_content>\Accusoft.Pcc.SharePoint.wsp
```

5. Deploy the solution:

PowerShell Code:

```
# Install-SPSolution Accusoft.Pcc.SharePoint.wsp -GACDeployment
```

6. Activate the Prizm Digital Rights Management feature for one or more Web Applications in the Farm:

PowerShell Code:

```
# Enable-SPFeature Accusoft.Pcc.SharePoint_DigitalRightsManagement -Url  
<WebAppUrl>
```

7. Activate the Prizm Configuration Tools feature for one or more site collections:

PowerShell Code:

```
# Enable-SPFeature Accusoft.Pcc.SharePoint_PrizmConfigurationTools -Url  
<SiteCollectionUrl>
```

8. Give the application pool identity (or identities) permission to modify the tempcache directory at %allusersprofile%\Accusoft\Prizm\Cache\.
9. Determine the application pool identity for each Web Application:
 - a. Go to Start, select Run and then enter inetmgr.
 - b. The Internet Information Services (IIS) Manager displays.
 - c. Under the Connections explorer, expand the node for your server.
 - d. Select the item Application Pools.
 - i. In the list of application pools, select the row that corresponds to your SharePoint Web Application. Look for the value under the Identity column, this will give you the Application Pool Identity.
 - ii. Modify the permissions for the tempcache folder; give each of the application pool identities permission to Modify the tempcache folder.
10. The location of the tempcache folder will by default be %allusersprofile%\Accusoft\Prizm\Cache\. If you wish to modify this location, refer to the Configuring Prizm Global Configuration section.
11. The installation process is now complete.

5.5.2 Multi-Server Install Guide

This section will guide you through installing Prizm Content Connect for SharePoint in a multi-server farm topology.

If you desire to deploy SharePoint, PCC for SharePoint Integration, and Prizm Content Connect to the same server, such that you only have one server total, please use the Single-Server Install Guide.

5.5.2.1 Installation using PowerShell

This installation guide will provide you (an experienced SharePoint administrator) with sufficient information to add, deploy, and activate the Prizm Content Connect for SharePoint product using PowerShell cmdlets.

If you prefer to install via GUI Application, go to the Installation using GUI Application section.

To install PCC for SharePoint Integration on your SharePoint 2013 farm, installation will need to be performed on a SharePoint web front end or application server. Log on to the SharePoint server of your choice and perform the following steps:

1. Download the PCCForSharePoint.zip file from Accusoft.com.
2. Save the PCCForSharePoint.zip file anywhere on the SharePoint server and extract zip file to:

```
C:\<path_to_install_zip_content>\
```

3. Open the SharePoint 2013 Management Shell:

```
SharePoint 2013 Products > SharePoint 2013 Management Shell
```

4. Add the solution to the solution store:

```
PowerShell Code:
```

```
# Add-SPSolution C:\<path_to_install_zip_content>\Accusoft.Pcc.SharePoint.wsp
```

5. Deploy the solution:

```
PowerShell Code:
```

```
# Install-SPSolution Accusoft.Pcc.SharePoint.wsp -GACDeployment
```

6. Activate the Prizm Digital Rights Management feature for one or more Web Applications in the Farm:

```
PowerShell Code:
```

```
# Enable-SPFeature Accusoft.Pcc.SharePoint_DigitalRightsManagement -Url  
<WebAppUrl>
```

7. Activate the Prizm Configuration Tools feature for one or more site collections:

```
PowerShell Code:
```

```
# Enable-SPFeature Accusoft.Pcc.SharePoint_PrizmConfigurationTools -Url  
<SiteCollectionUrl>
```

8. Give the application pool identity (or identities) permission to modify the tempcache directory at %allusersprofile%\Accusoft\Prizm\Cache\.
9. Determine the application pool identity for each Web Application:
 - a. Go to Start, select Run and then enter inetmgr.
 - b. The Internet Information Services (IIS) Manager displays.
 - c. Under the Connections explorer, expand the node for your server.
 - d. Select the item Application Pools.
 - i. In the list of application pools, select the row that corresponds to your SharePoint Web Application. Look for the value under the Identity column, this will give you the Application Pool Identity.

- ii. Modify the permissions for the tempcache folder; give each of the application pool identities permission to Modify the tempcache folder.
10. Perform the one-time only configuration steps for Installing PCC for SharePoint for Multi-Servers.

5.5.2.2 One Time Only Configuration for PCC for SharePoint

To complete the installation of the PCC for SharePoint Integration you need to configure sharing and permissions for the tempcache folder, and configure the PCC for SharePoint Integration with the location of the Prizm Content Connect Services.

Configure the Tempcache

Configuration of the tempcache, or cache folder, permits the PCC for SharePoint Integration code to write to and read from the folder. In a multi-server topology, Prizm Content Connect is installed on a separate server from the servers hosting SharePoint; this server is called the Prizm Content Connect Server. The tempcache folder is located on the Prizm Content Connect Server.

These configuration steps will share this folder as a network share and then set appropriate share and NTFS permissions for the folder:

1. For each web application in your SharePoint farm that will use PCC for SharePoint, you will need to know the application pool identity (user).
 - a. Open the SharePoint 2013 Management Shell: Start > Microsoft SharePoint 2013 Products > SharePoint 2013 Management Shell.
 - b. Get the web application:

PowerShell Code:

```
# $webApp = Get-SPWebApplication <WebAppUrl>
```

- c. Get the application pool identity:

PowerShell Code:

```
# $webApp.ApplicationPool.Username
```

2. On the Prizm Content Connect Server, get the account the Prizm service logs on as:
 - a. Open the Windows Services console. From the Command Prompt enter "services.msc".
 - b. In the Services console, find the account listed in the column Log On As for the Prizm Service.

3. Share the cache folder as a network share:

- a. On the Prizm Content Connect Server find the cache folder created by the Prizm Content Connect installer. By default this will be at:
%allusersprofile%/Accusoft/Prizm/Cache/.
 - b. In Windows Explorer, right-click on the cache folder and select Properties.
 - c. In the Properties dialog, select the Sharing tab and then click the Advanced Sharing button:
 - d. In the Advanced Sharing dialog, check the option to Share this folder:
 - e. Click the Permissions button:
 - f. Optionally, remove all existing users from this list:
 - g. In the Permissions dialog, add the user for the application pool identity from Step 1, above.
 - h. Give the user Change and Read permissions:
 - i. Repeat Steps 3.g. and 3.h. above for each of the application pool identities from Step 1 above.
 - j. In the Permissions dialog, add the Log On As user for Prizm service from Step 2, above. Also give this user permission to Read and Change.

 - k. Click OK to apply permissions and close the Permissions dialog.
 - l. Click OK to share the folder and close the Advanced Sharing dialog.
 - m. In the Cache Properties dialog on the Sharing tab, make note of the Network Path of the shared cache folder. In the image below, this is shown as \\PCC\Cache:
 - n. Click Close to exit the Properties dialog.
4. Modify the security settings for the cache folder.
 - a. In Windows Explorer, right-click on the cache folder and select properties.
 - b. In the Properties dialog, select the Security tab.
 - c. Give each application pool identity permissions to Modify this folder.

5.6 Configure the PCC for SharePoint Integration with the Location of Prizm Content Connect

The PCC for SharePoint Integration needs to know the location of the PCCIS and its supporting technologies.

Prizm Global Configuration

Search this site...

Central Administration

- Application Management
- System Settings
- Monitoring
- Backup and Restore
- Security
- Upgrade and Migration
- General Application Settings
- Apps
- Configuration Wizards
- Site Contents

PCC Services

These settings tell Prizm Content Connect for SharePoint how to communicate with the PCC Services.

Note: refer to the installation guide for a walkthrough of setting up a multi-server environment.

Search Terms Path

%ALLUSERSPROFILE%\Accusoft\Prizm\SearchTerms

c:\programdata\accusoft\prizm\searchterms or \\192.168.198.192\searchterms

Web Service Scheme

http

http

Hostname

localhost

localhost, server.tydomain.com, or 192.168.198.192

Port

18681

18681, 80, -

Proxy Port

18680

18680, 80, -

Web Service Path

PCCIS/v1

PCCIS/v1

Tempcache Location

C:\ProgramData\Accusoft\Prizm\Cache

c:\programdata\accusoft\prizm\cache or \\192.168.198.192\tempcache

OK

Search Terms Path

Use this to specify a search terms path on the PCC server to supply preloaded Search terms to the viewer. Please see the Prizm Content Connect help file for more information on this topic at <http://www.accusoft.com/manuals.htm>

Web Service Scheme

Use this to define whether your site will communicate with PCC over HTTP or HTTPS.

Hostname

The hostname setting specifies the hostname of PCCIS.

By default the value of this setting is "localhost", which is appropriate for single-server topologies. In other words, "localhost" is an appropriate value when PCC is installed on the same server as SharePoint.

This setting can be set to the hostname or IP of another machine that hosts PCCIS in order to support a multi-server topology. However, setting up a multi-server topology requires some

additional configuration of PCC. For more information on setting up a multi-server topology, see the Installation Guide.

This setting should not include a protocol, port number, or trailing slashes. The following examples are invalid values for this setting: "http://localhost", "pcc.mydomain.com/", and "pcc.mydomain.com:18680".

Port

The port setting specifies the port of PCCIS for handling the viewing of documents.

By default the value of this setting is "18681". In most cases this value will be appropriate. However, in rare cases you may need to change the port of PCCIS. If you change the port of PCCIS, then you will have to update this setting with the new port number.

Proxy Port

The port setting specifies the port of PCC's Proxy Server that handles conversion of documents to PDF with or without redaction.

By default the value of this setting is "18680". In most cases this value will be appropriate. However, in rare cases you may need to change the port of the Proxy Server used for Conversions. If you change the port of Proxy Server, then you will have to update this setting with the new port number.

Tempcache Location

The tempcache location setting specifies the location of the tempcache folder. This value must be a fully qualified path to a directory. It supports UNC path names.

By default, the value of this setting is evaluated from "%allusersprofile%\Accusoft\Prizm\Cache". Typically, that expression will evaluate to "C:\ProgramData\Accusoft\Prizm\Cache", but it is dependent on the environment variables.

The default value is appropriate for single-server topologies. In other words, the default value is appropriate when PCC is installed on the same server as SharePoint.

To support multi-server topologies this setting can be changed to the path of a network share. The path must be valid and point to the same shared folder for all servers in the multi-server topology, including the PCC server.

Important! Permissions must be set correctly for the tempcache folder. If you are planning on changing the location of the tempcache folder used by PCC for SharePoint, you must set the

appropriate permissions for that folder in addition to setting the tempcache location as described below.

The following permissions are required for the tempcache folder:

1. The Prizm service account must have permission to modify the tempcache folder.
2. Web application pool identities must have permission to modify the tempcache folder.
3. For a guided walkthrough of setting up a multi-server topology and the tempcache, including setting the tempcache permissions, see the Installation Guide.

Next Steps

To continue setting up PCC for SharePoint, you will need to configure the product for viewing the contents of a document library. You can take one of several approaches, depending on the behavior you want to offer the end user.

6 Administration Guide

6.1 Viewer Functionality

6.1.1 Redirecting Links to the Document

Document redirection is a function of DRM. If DRM is enabled for a user for a document, then the user will be redirected to a page showing the document in the Prizm Content Connect Viewer if they click on a link to the document.

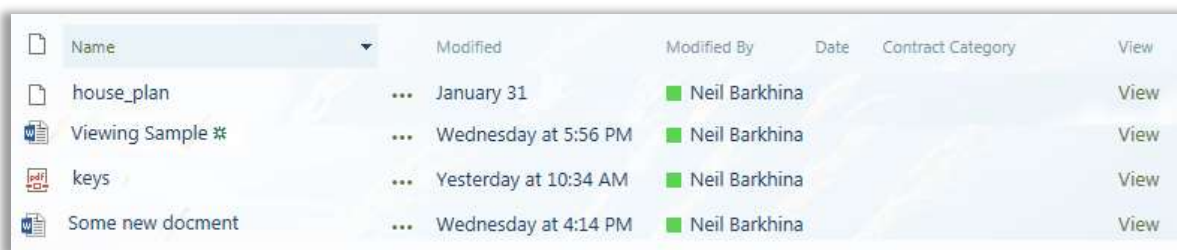
If DRM is not enabled for the user for the document, then the default SharePoint behavior will occur (such as the browser asking the user if they want to download the document). If DRM is enabled, you can restrict viewer functionality such as printing, copying, and saving, if you want. See the Digital Rights Management topic for more information on DRM, and see the Configuring DRM topic for information on how to configure DRM.

6.1.2 Configuring the Previewer

The simplest, least-invasive means of viewing a document is through adding a Preview column to a document library. This column presents the user with a link to view the document in a pop up without leaving the page.

Example 1

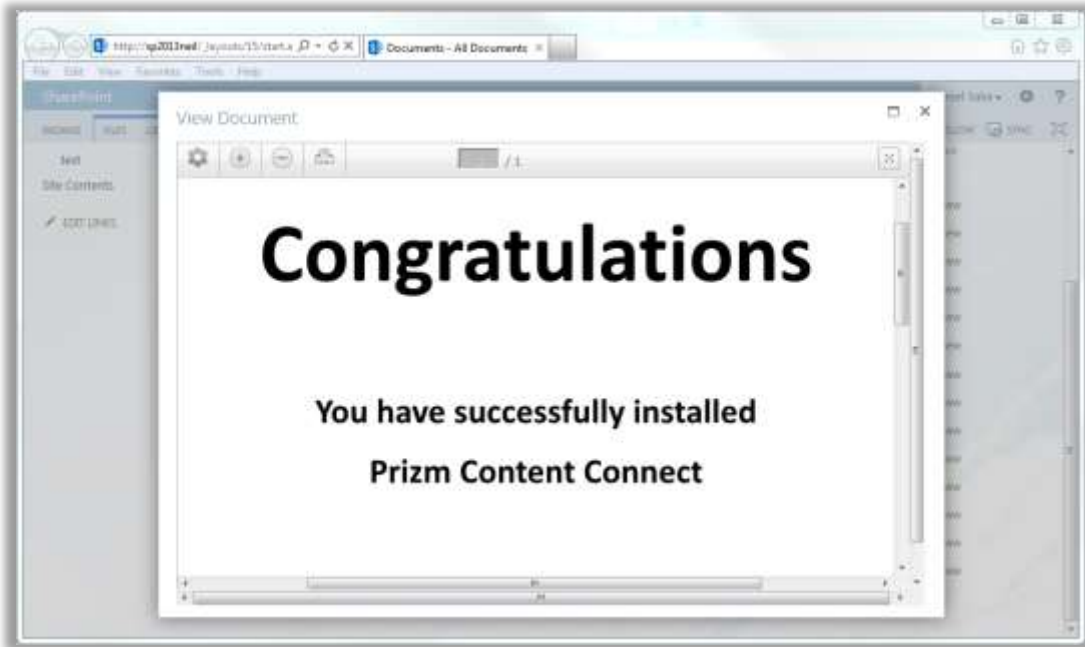
The figure below shows a document library with a preview column added (the right most column). For each row, the "View" link will open the document in a pop up for viewing:



Name	Modified	Modified By	Date	Contract Category	View
house_plan	...	January 31	Neil Barkhina		View
Viewing Sample #	...	Wednesday at 5:56 PM	Neil Barkhina		View
keys	...	Yesterday at 10:34 AM	Neil Barkhina		View
Some new document	...	Wednesday at 4:14 PM	Neil Barkhina		View

Example 2





The figure below shows previewing a Microsoft Word document in a pop up:



6.1.2 The Viewer Option

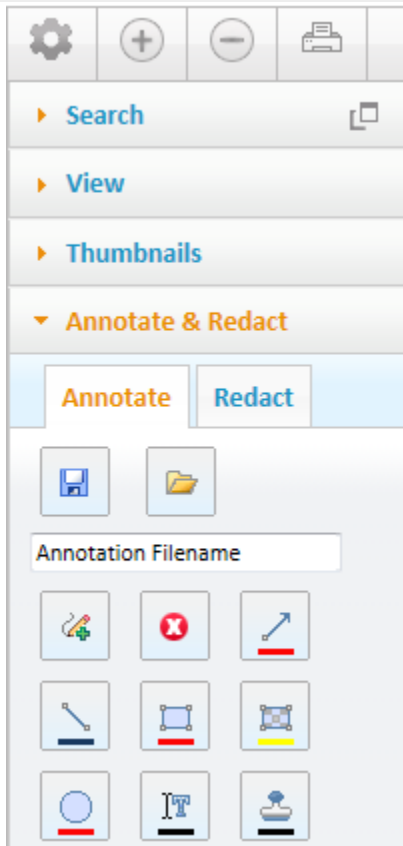
The top bar of the viewer includes the following features:





- To zoom in and zoom out, select the plus and minus buttons:  and .
- To print, select the printer button: .
- To view other available options, select the gear button: .
- To navigate through the document, select the arrows.

6.1.3 Document Annotation and Redaction

1. Click on the gear button on the top left corner of the document view to display the viewer options.
2. Click on Annotate & Redact to mark up the document.

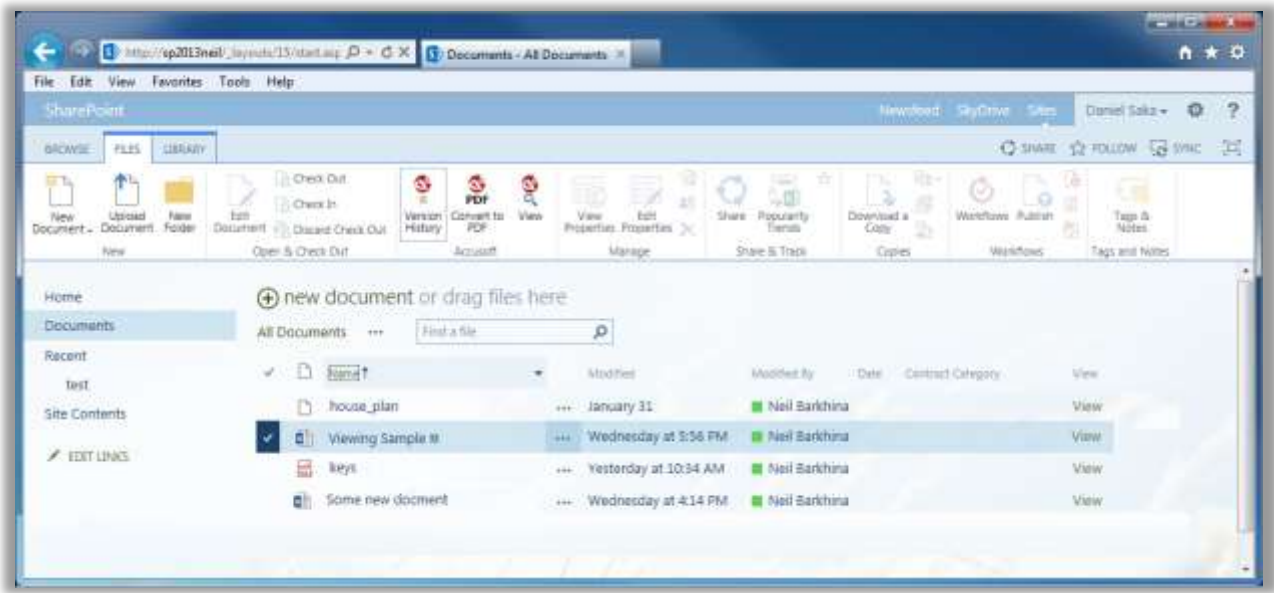


3. Once done, click on the Save button  to save the annotations or redactions.

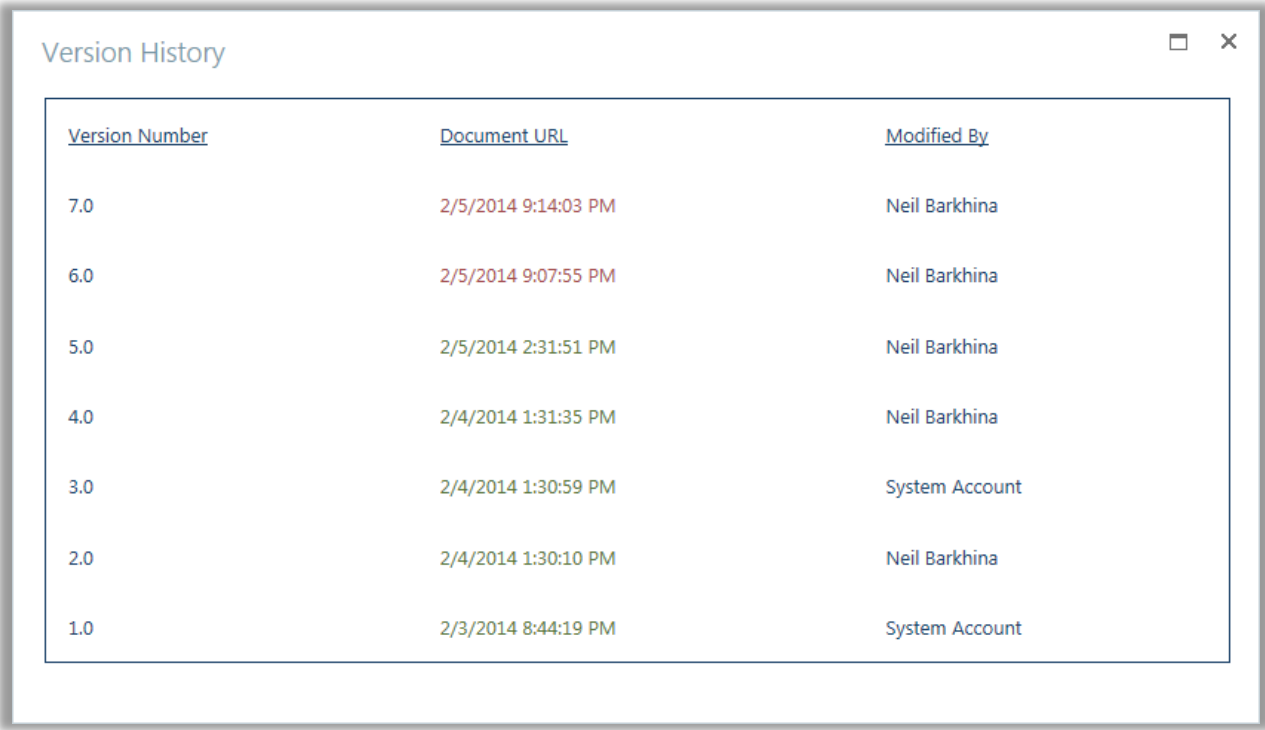
4. Use the load button  to load any annotations or redactions that were previously saved for this document.

6.1.4 Version History

1. Select a document and click on the version history button:



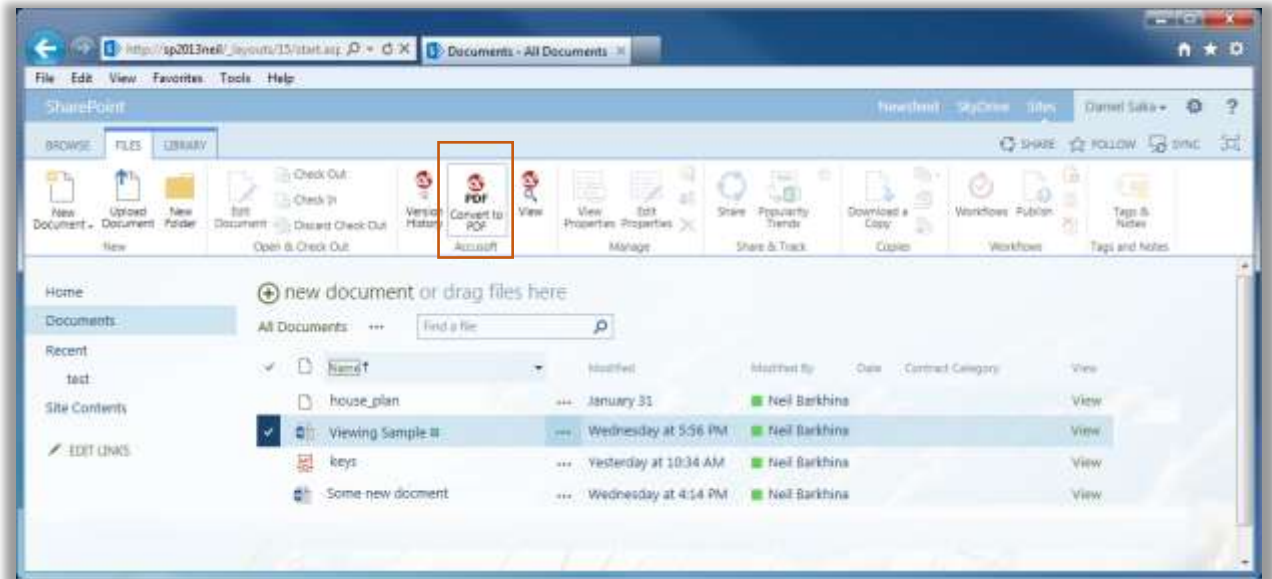
2. The version history pop-up will then be displayed. Click on the timestamp document URL to display in the PCC viewer one the previous version of the document.



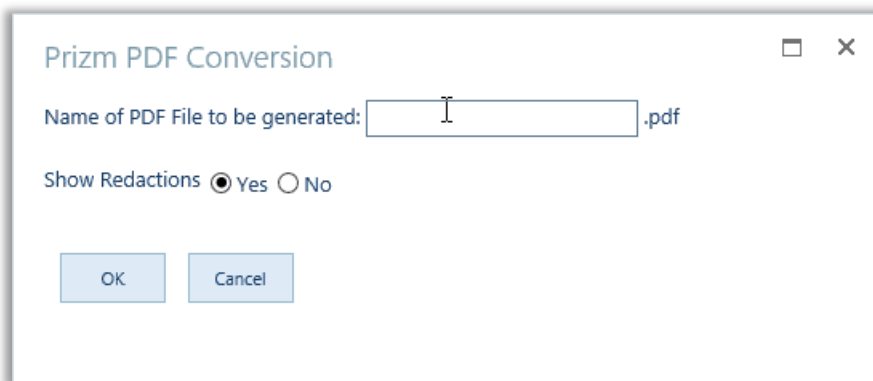
You will also be able to load annotations and redactions of previous versions of the document.

6.1.5 Convert to PDF

1. To convert a document to PDF format, first select the file then click on the Convert to PDF button:



2. A pop-up displays, requiring you to provide a name for the PDF file, and giving you the option of showing redactions on the PDF files:.



3. Click OK and the new PDF file will be saved in the same document library.

6.2 DRM Configuration Guide

Configuration of Prizm DRM requires some planning in order to adequately protect documents from low-trust user groups while at the same time enabling high-trust user groups to use the built-in features of SharePoint. Protection of documents using Prizm DRM means that many built-in features of SharePoint will be disabled for the low-trust user groups. This guide will help you understand how to properly configure the Prizm DRM and SharePoint for both the low-trust and high-trust user groups.

6.2.1 Low-Trust & High-Trust User Groups

Low-trust user groups and high-trust user groups are terms defined by this guide, which are used to help classify the different groups of users accessing documents in your SharePoint site.

Configuration of Prizm DRM and SharePoint permissions for a specific group depends on the classification of the group as a low-trust user group or high-trust user group. The sections below discuss more about each of these classifications and the permissions that should be granted to each.

Low-Trust User Groups

Low-trust user groups are SharePoint groups for which you want to limit their ability to duplicate contents of documents from one or more document libraries. To effectively limit the groups' ability to duplicate contents of a document, both SharePoint permissions and Prizm DRM need to be configured to control access to the documents.

Typically low-trust user groups will be granted a level of read-only access using SharePoint permissions, and then the groups' access to the documents will be further restricted using Prizm DRM permissions.

There may be some cases where a low-trust user group is granted more than read-only permissions in SharePoint, which may include permissions to contribute, edit, or manage a list or site. However, these scenarios should be limited as it could result in a conflicting user experience where the group is granted permission to edit or manage a document, but Prizm DRM restricts their ability to download or copy contents of the document.

There are some SharePoint permissions that must be denied to low-trust user groups in order to effectively limit access to documents:

- The SharePoint base permissions 'Use Client Integration Features', and
- The 'Use Remote Interfaces' should not be granted to a low-trust user group, because granting either of these permissions enables direct access to a document through specific channels.

Granting either of these permissions to a low-trust user group would allow a user to circumvent protection offered by Prizm DRM.

High-Trust User Groups

High-trust user groups are SharePoint groups that need to have greater access to documents in a document library or site. Furthermore, the ability to duplicate contents of a document does not need to be controlled for these groups. As a result, Prizm DRM is not needed to limit the access of high-trust user groups to a document.

Although DRM can typically be disabled for high-trust user groups, there is one common scenario where DRM is enabled for high-trust user groups. In order to offer high-trust user groups the same ability to click a link to a document and view it in the browser, DRM can be enabled for high-trust user groups. Unlike for low-trust user groups, Prizm DRM permissions can be used to grant the high-trust groups the ability to save the document.

The 'Use Client Integration Features' base permission must still be denied to the high-trust user groups so that the redirection will function correctly. And it is important to note that denying this base permission will result in loss of built-in SharePoint features for this group.

An alternative option for enabling in-browser viewing for high-trust user groups is to use the Prizm Preview Field. Configuring this feature is described in [Configuring the Previewer](#).

6.2.2 SharePoint Features Affected by DRM

Enabling DRM and configuring SharePoint to accurately protect documents from low-trust user groups requires that some built-in features of SharePoint be disabled or blocked for the low-trust user groups. Likewise, if DRM is enabled and configured for a high-trust user group, then some SharePoint features will also be blocked for the high-trust user group.

Features Blocked by Prizm DRM

The Prizm Redirector component (part of Prizm DRM) will block some built-in features of SharePoint. The following built-in features will be blocked for groups after properly configuring Prizm DRM for the group:

- Direct access to document via URL
- Download a Copy button and menu item (conditionally enabled*)
- Send To Other Location buttons (located on both the ribbon and from the ECB menu) (conditionally enabled*)
- Create Document Workspace buttons (located on both the ribbon and from the ECB menu) (conditionally enabled*)
- Opening files via WebDAV (conditionally enabled*)

Features Disabled through SharePoint Permissions

When denying a group SharePoint permissions, the group will lose access to certain SharePoint functionality. The SharePoint base permissions 'Use Client Integration Features' and 'Use Remote Interfaces' will need to be denied to low-trust user groups. If enabling DRM for high-trust user groups, then 'Use Client Integration Features' will need to be denied.

The following list shows notable built-in SharePoint features that will be disabled for users when a base permission is denied:

Use Client Integration Features Base Permission

Notable built-in features that will be disabled:

- Opening a document in a client application
- 'Upload Multiple Documents' ribbon button
- 'Open with Explorer' ribbon button

Use Remote Interfaces Base Permission

- Notable built-in features that will be disabled:
- SOAP protocol
- WebDAV protocol
- Use of the Client Object Model
- SharePoint Designer

6.2.3 DRM Configuration Walkthrough

This section presents a walkthrough to configure Prizm DRM and SharePoint permissions for high-trust and low-trust user groups. The walkthrough results in a simple yet secure DRM configuration. For some readers, this may be sufficient to support the needs of your SharePoint deployment and organization. For other readers, the walkthrough will just be a learning experience and your implementation will need to be more detailed to meet the complex needs of your SharePoint deployment and organization.

6.2.3.1 Working with Client Integration Features

Disable Client Integration Features for Low-Trust User Groups

For low-trust user groups, or other groups for which DRM will be enabled, client integration features will need to be disabled per group, as described in the sections [Creating a Limited Permission Level to Assign to Low-Trust User Groups](#) and [Assigning a Limited Permission Level to Low-Trust User Groups](#). We disable Client Integration for low-trust user groups because Client Integration interferes with the functioning of the Prizm DRM Redirector, causing a dialog to display before redirection and causing some file types to not be redirected.

6.2.3.2 Creating a Limited Permission Level to Assign to Low-Trust User Groups

Some SharePoint permissions need to be disabled for low-trust groups in order to enforce DRM settings. This concept is explained more in the sections Low-Trust & High-Trust User Groups and SharePoint Features Affected by DRM.

The steps below walk through the process of creating a new permission level with limited permissions which will later be used to assign permissions to a low-trust group.

To create this permission level, we will copy the built-in Read permission level in SharePoint and then remove the 'Use Remote Interfaces' and 'Use Client Integration Features' base permissions from this permission level.

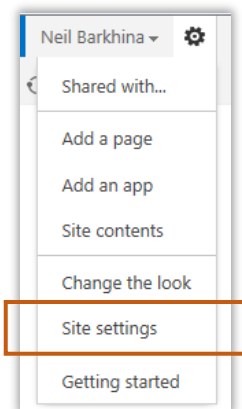
It is not required to copy the Read permission level. What is important is:

- To deny the Use Remote Interfaces and Use Client Integration Features base permissions, and
- To choose the appropriate level of permissions for browsing, viewing, contributing, and managing

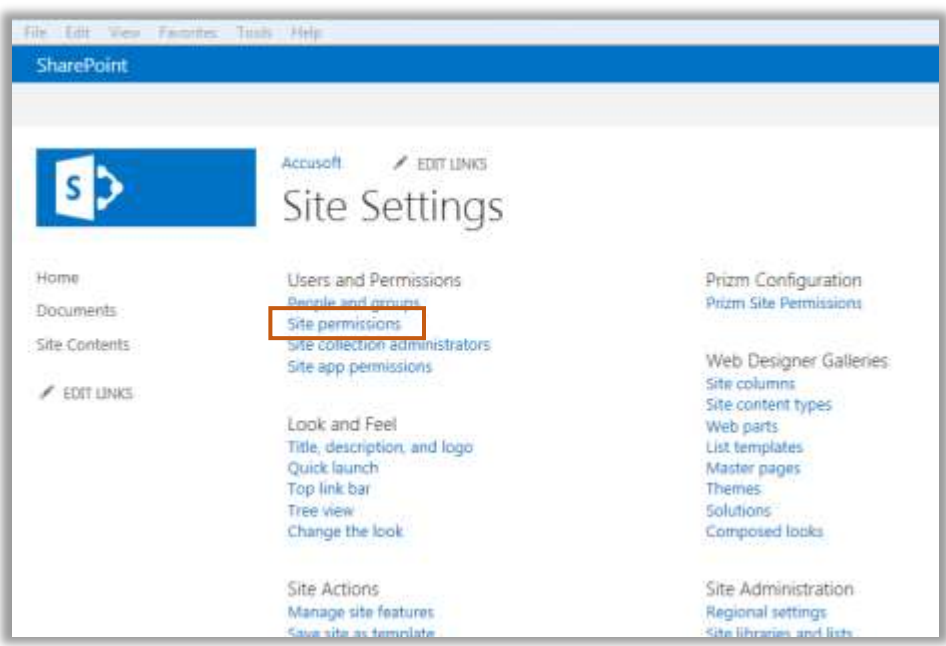
The Permission Level

To set up the DRM on a SharePoint 2013 site, you will first need to create a new permission level. In order to do so, execute the following actions:

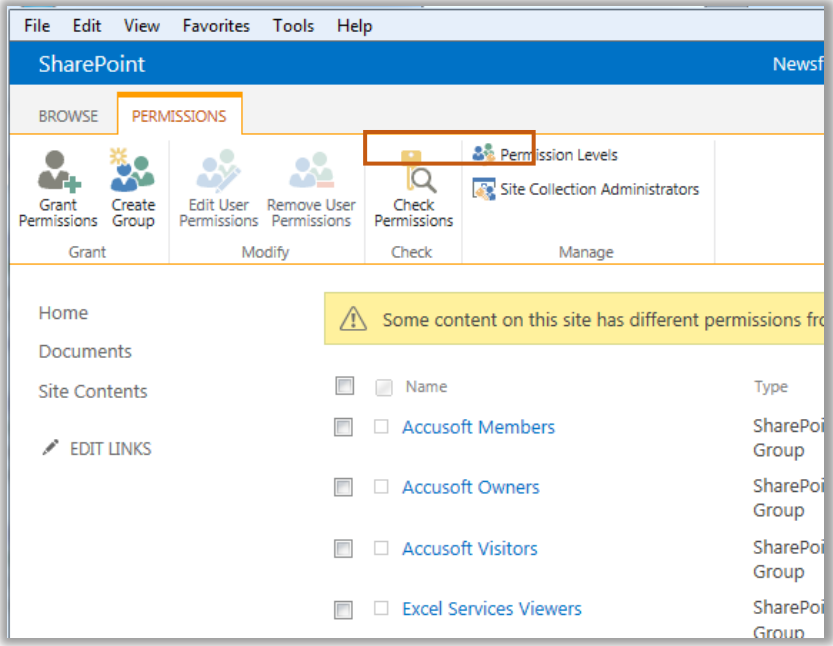
1. Click on the gear wheel located at the top right corner of the page. Then Click on Site Settings.



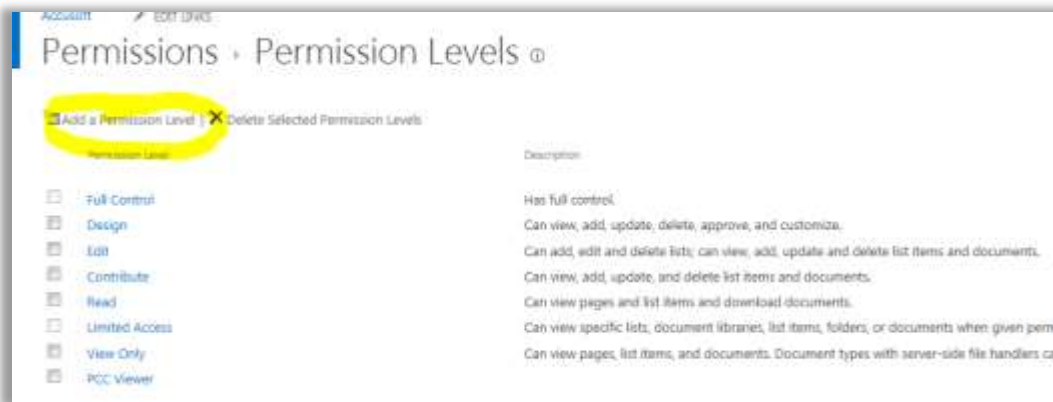
>> Once on the site Settings page, click on Site permissions, under "User and Permissions":



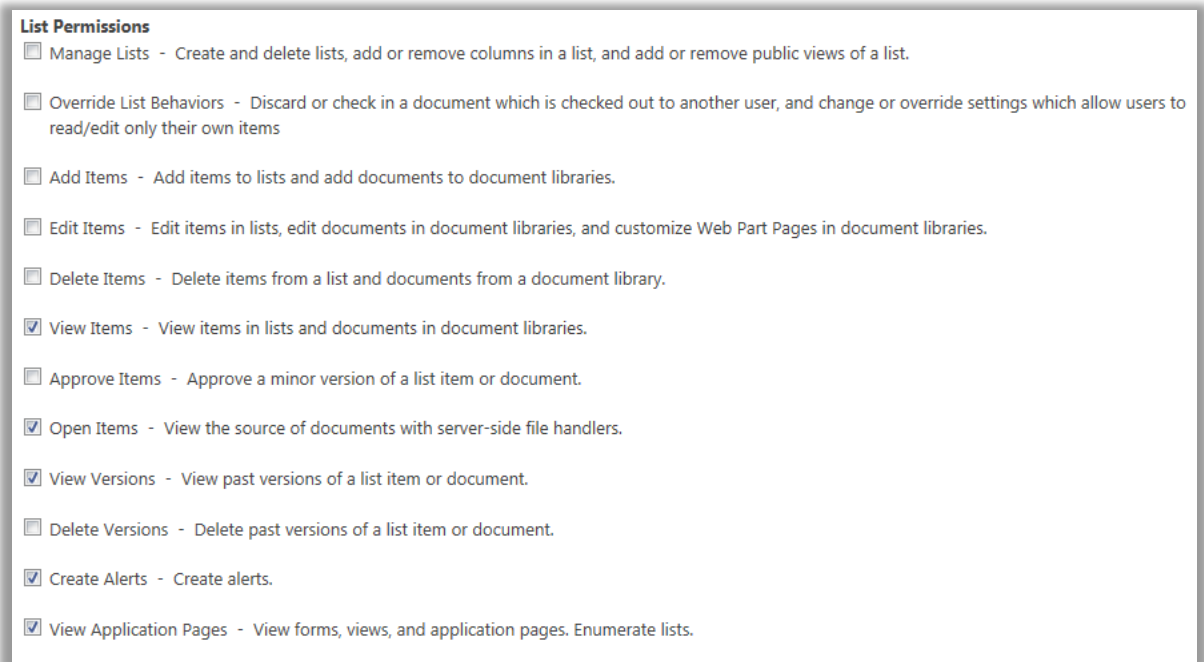
2. Under the tab "Permissions", click on "Permission Levels":



3. Finally, click on "Add a Permission Levels":

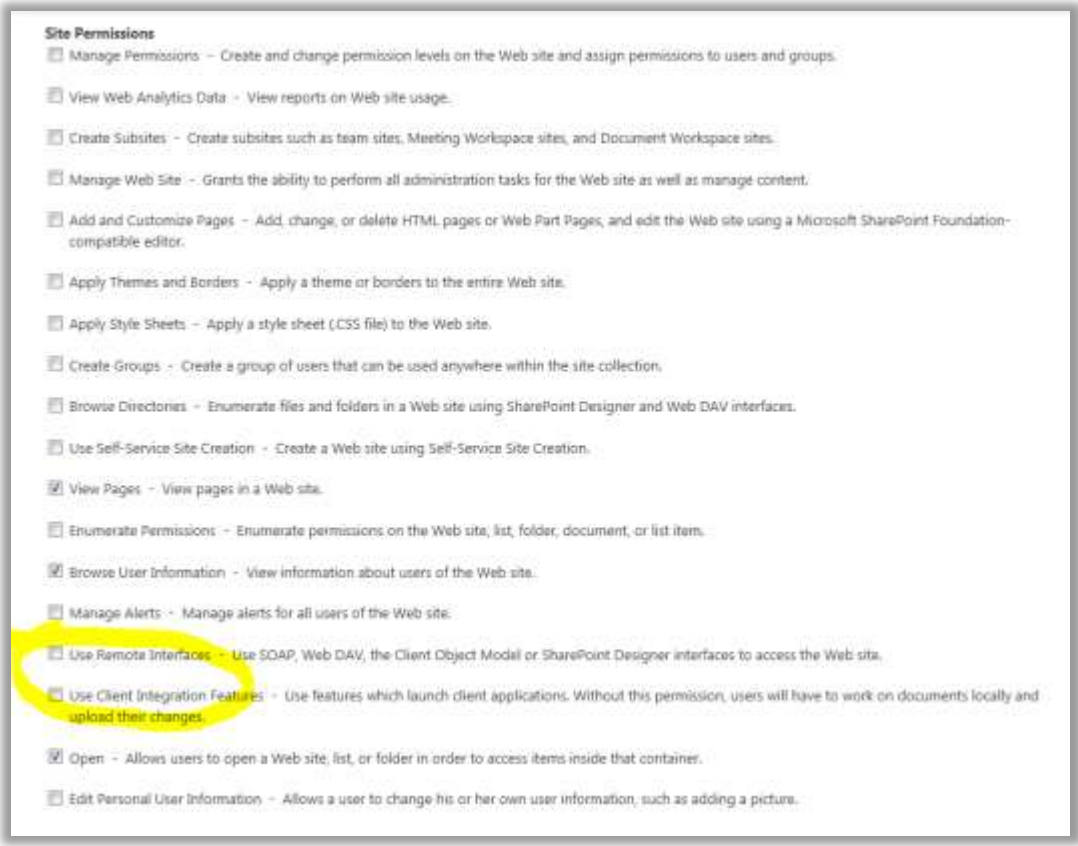


4. We are going to name the permission Level **PCC Viewer**.
5. Under List Permissions, make sure to check *View Items*, *Open Items*, *View Version*, *Create Alerts* and *View Application Pages*:

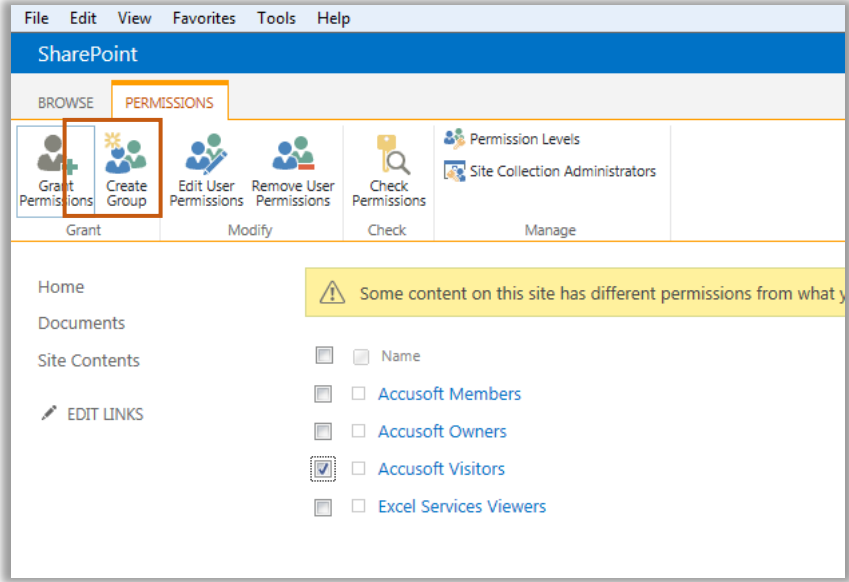


6. Under Site Permissions, make sure to check *View Pages*, *Browse User Information*, *Open* and most important, make sure *Use Remote Interfaces* and *Use Client Integration Features*

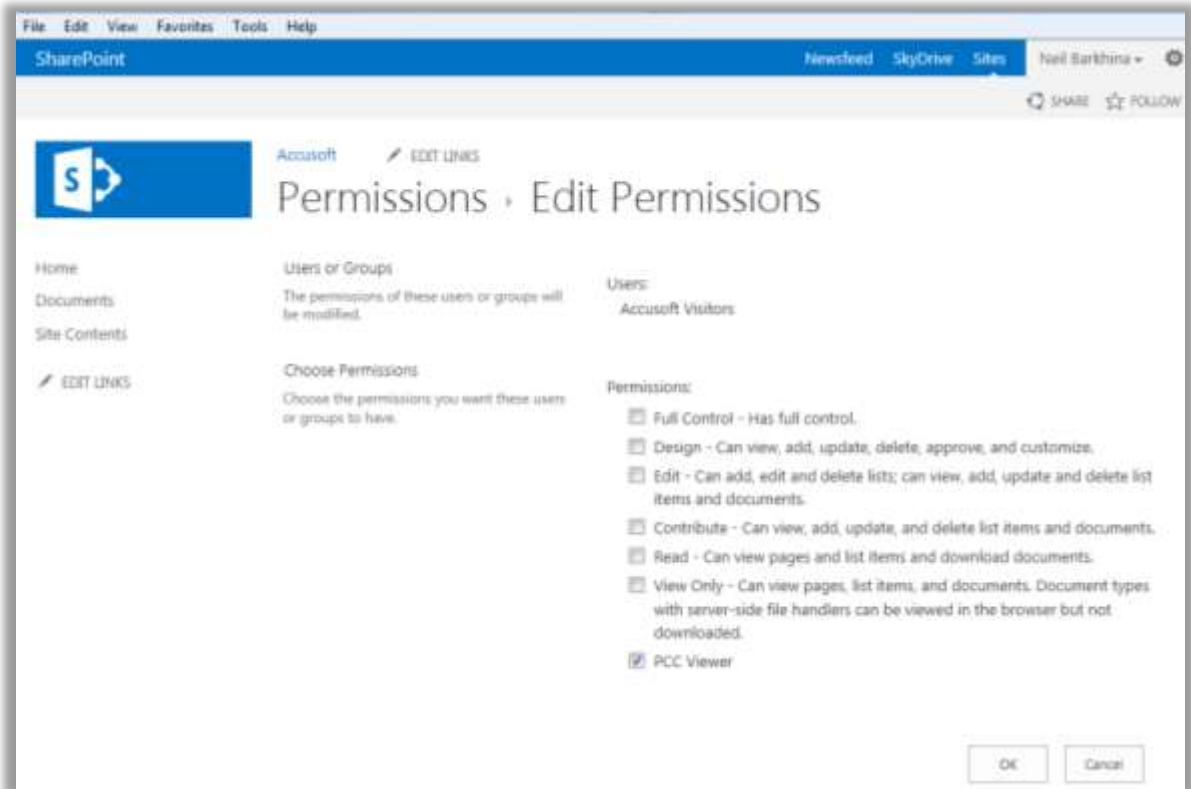
are **disabled**.



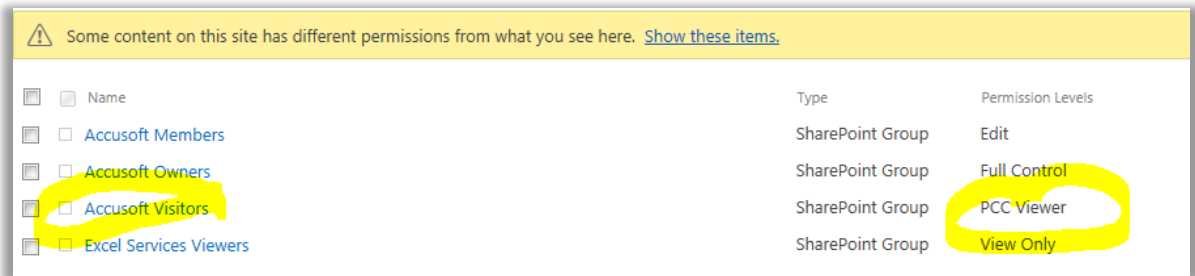
7. Now assign that new Permission Level to a group in SharePoint. Go back to the Permissions page and select the group. Click on Edit User Permissions, from the ribbon:



8. Select the new Permission Level; PCC Viewer, and click OK:



9. The Permission Level is updated for that group:

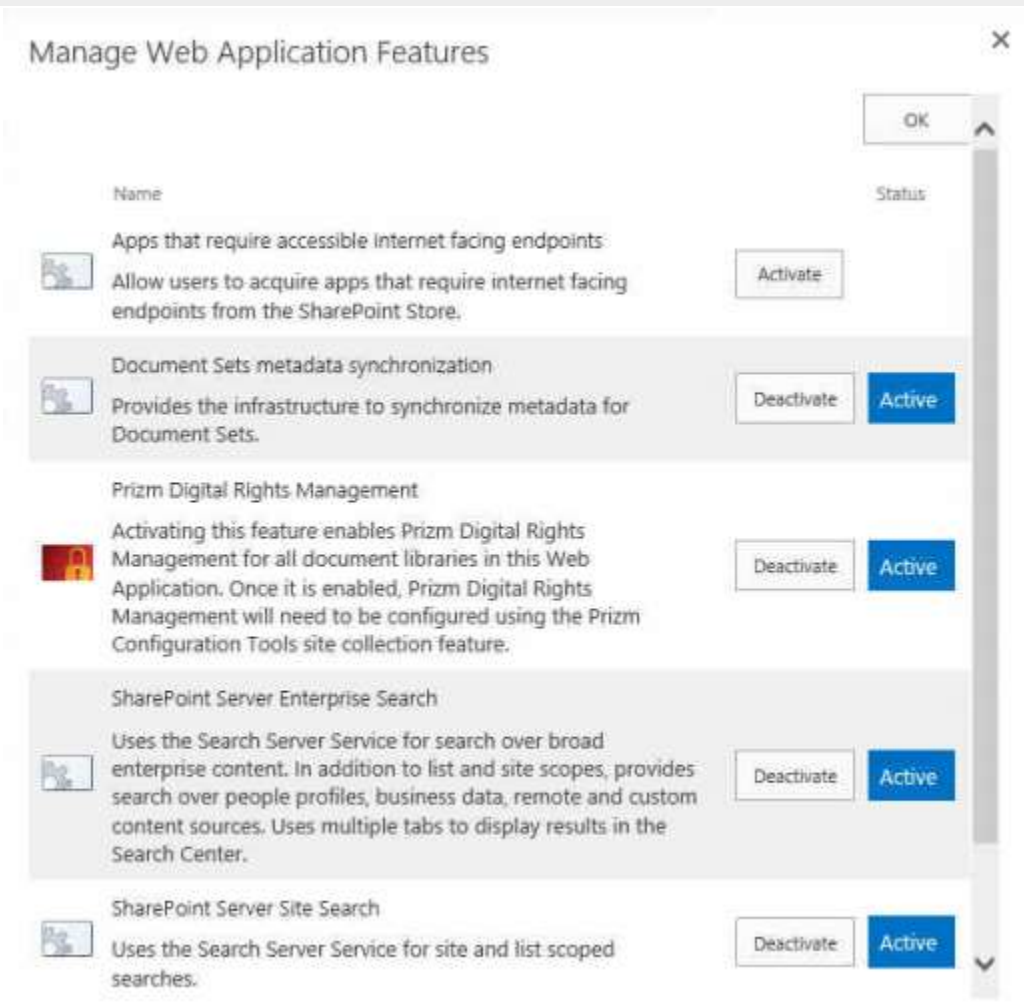


6.2.3.4 Enabling the DRM Redirector for a Web Application

Enabling the Prizm Digital Rights Management (DRM) feature for the web application will activate components that enforce DRM on document libraries in the web application.

To enable the DRM Redirector for a Web Application, follow these steps:

1. In SharePoint Central Administration, click on Application Management.
2. Under Web Applications, click on Manage web applications.
3. Click on the Web Application you want to enable Prizm Digital Rights Management, then click Manage Features. The Manage Web Application Features window displays.
4. Under the Prizm Digital Rights Management feature, click Activate and then click OK.



5. You have successfully enabled the DRM Redirector for your selected Web Application.

6.2.3.5 Setting DRM Permissions for Low- and High-Trust User Groups

This section walks through the process of configuring DRM permissions for Low- and HighTrust user groups. It first offers a recommended configuration for each classification and then provides steps to configure permissions at the individual library level or at the site level.

Recommended Configuration

Low-Trust User Groups

Enable DRM for low-trust user groups to limit their access to documents in a document library. Optionally, grant the low-trust user groups DRM permissions to Copy or Print the document from the viewer.

IMPORTANT: Carefully consider when granting a low-trust user group the DRM permission for Save/Send. This permission would allow members of the group to download the original document.

High-Trust User Groups

Disable DRM for high-trust user groups on document libraries to allow them to use the SharePoint features without disruption.

Configuration Steps

Two sets of configuration steps for DRM permissions are provided. The first set allows configuration of DRM permissions that apply site-wide, which is the quickest way to apply DRM protection to documents in all libraries of the site. The second set of instructions allows configuration of DRM permissions at the individual library level, which includes the ability to override the site-wide settings for a specific library.

Depending on the needs of the organization deploying DRM, DRM may only need to be configured for individual document libraries, only site-wide, or in some cases a little of both:

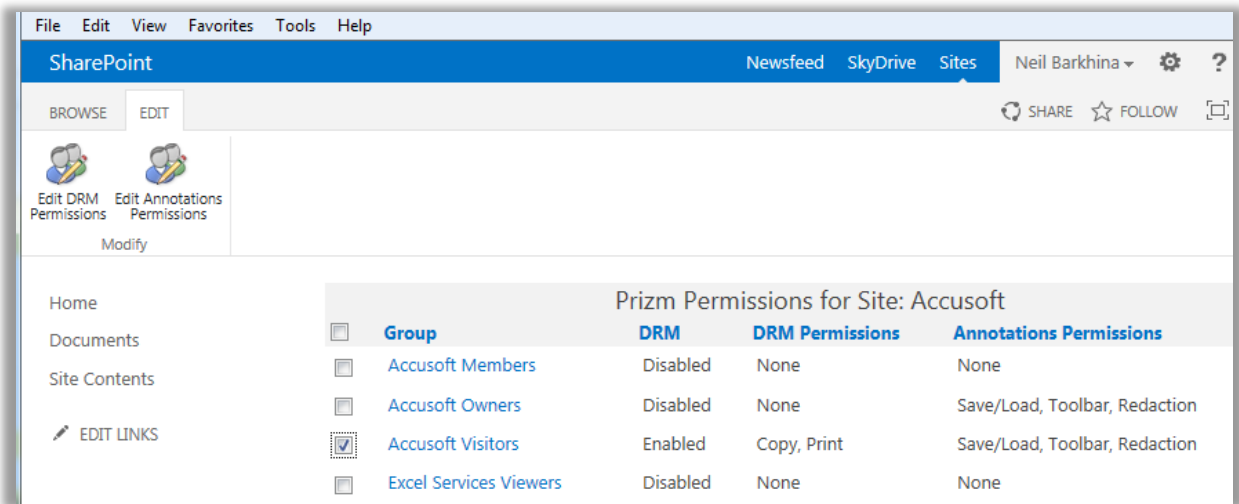
- Configuring DRM for a Site
- Configuring DRM for a Document Library

6.2.3.5.1 Configuring DRM for a Site

To configure DRM for a site, follow these steps:

These site settings will apply to all document libraries in the site unless you override the settings for a document library as described in the Configuring DRM for a Document Library section.

1. Open the site you want to configure DRM.
2. Click on Site Actions, then click Site Settings.
3. Under the Prizm Configuration heading, click on Prizm Site Permissions:
 - a. If the Prizm Configuration heading is not available, you will need to enable Prizm Configuration Tools for the Site Collection.
4. The Prizm Permissions page for the site displays. The table on this page shows the DRM permissions and annotations permissions that are currently set for each group. Select one (or more) groups to configure for DRM and then select Edit DRM Permissions:



5. The Edit Prizm Site DRM Permissions window displays. Under DRM Settings, select the desired DRM settings and permissions for the group(s). To enable DRM for the group(s) site-wide, select Enable DRM for site option and then check Copy or Print as desired. To disable DRM for the group(s) site-wide, select Disable DRM for site:
 - The recommended starting point for low-trust users is to enable DRM and optionally enable copy and print. The recommended starting point for high-trust users is to disable DRM.
 - If no groups are selected when you select Edit DRM Permissions, the Edit DRM Permissions dialog will include a People Editor you can use to specify which groups the settings apply to.
6. Click OK and your settings are saved. You will be able to view the new settings in the DRM and DRM Permissions columns on this page.

6.2.3.5.2 Configuring DRM for a Document Library

To configure DRM for a document library, follow these steps:

When you create permission settings at the Document Library level, they will override any permission settings created at the Site level.

1. Go to the Document Library where you want to configure DRM.
2. On the Library Tools tab, select Library.
3. Under Settings, select Prizm Library Permissions.

- a. If the Prizm Library Permissions button is not available, you will need to enable Prizm Configuration Tools for the Site Collection.
4. The Prizm Permissions page for the document library displays. The table on this page shows the DRM permissions and annotations permissions that are currently set for each group. Settings inherited from the site are prefixed with "Inherited:". Select one (or more) document libraries to configure for DRM and then select Edit DRM Permissions.

Prizm Permissions for Document Library: Documents				
	Group	DRM	DRM Permissions	Annotations Permissions
<input type="checkbox"/>	Accusoft Members	Inherited: Disabled	Inherited: None	Inherited: None
<input type="checkbox"/>	Accusoft Owners	Disabled	None	Save/Load, Annotations, Redaction
<input type="checkbox"/>	Accusoft Visitors	Inherited: Enabled	Inherited: Copy, Print	Annotations
<input type="checkbox"/>	PCC View-Only Group	Inherited: Enabled	Inherited: None	Inherited: Load, Save/Load, Annotations

5. The Edit Prizm Document Library DRM Permissions window displays. Under DRM Settings, select the desired DRM settings and permissions for the group(s). To enable DRM for the group(s) for the document library, select Enable DRM for document library and then check Copy, Print and/or Save/Send as desired. To disable DRM for the group(s) for the document library, select Disable DRM for document library. Otherwise, to have the library inherit settings from the site for the selected group(s), select Inherit site settings:
 - The recommended starting point for low-trust users is to enable DRM and optionally enable copy and print. The recommended starting point for high-trust users is to disable DRM.
 - If no groups are selected when you select Edit DRM Permissions, the Edit DRM Permissions dialog will include a People Editor you can use to specify which groups the settings apply to.
6. Click OK and your settings are saved. You will be able to view the new settings in the DRM Permissions column on this page:

6.2.3.6 Adding the Previewer Column for High-Trust User Groups

Adding a Previewer column to the document library will permit high-trust users to view documents in the browser. The Previewer column is safe for use by low-trust user groups as well, meaning that it can be added to a view of the document library that is used by both low and high-trust user groups.

Instructions to add the Prizm Preview column to a document library are in the Configuring the Previewer section.

6.2.3.7 Disabling Ribbon & ECB Menu Actions

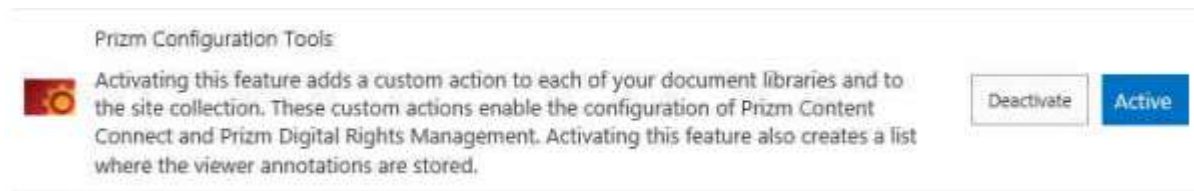
If DRM is enabled for a group, but the Save/Send permission is not granted, DRM will block the 'Download a Copy', 'Send To Other Location', and 'Create Document Workspace' actions accessible through the SharePoint ribbon and ECB menu (an error page will be displayed if the user accesses these options).

If you would like to not only block these options, but also disable the ribbon buttons and remove the ECB menu items in a document library, you can follow the steps below. If you would like to make this change to all document libraries in your site, you could alternatively use the approach described at <http://msdn.microsoft.com/enus/library/cc768565.aspx>.

6.3 Enabling Prizm Configuration Tools for a Site Collection

To enable Prizm Configuration Tools for a site collection, follow these steps:

1. From the root web, go to Site Actions and select Site Settings.
2. Under Site Collection Administration, click on Site collection features.
3. Scroll down to Prizm Configuration Tools and click Activate.



The Status column displays Prizm Configuration Tools as Active.

4. You have successfully enabled Prizm Configuration Tools for a site collection.

6.4 Configuring Annotations Permissions

This section contains the following information:

- Configuring Annotations for a Site
- Configuring Annotations for a Document Library

6.4.1 Configuring Annotations for a Site

To configure Annotations at the site level, follow these steps:

These site settings will apply to all document libraries in the site unless you override the settings for a document library as described on the Configuring Annotations for a Document Library page. Note that Annotation Settings will apply whether or not DRM is enabled.

1. Open the site where you want to configure Annotations.
2. Click on Site Actions, then click Site Settings.
3. Under the Prizm Configuration heading, click on Prizm Site Permissions:

If the Prizm Configuration heading is not available, you will need to enable Prizm Configuration Tools for the Site Collection.

4. The Prizm Permissions page for the site displays. The table on this page shows the DRM permissions and annotations permissions that are currently set for each group. Select one (or more) groups to configure for Annotations and then select Edit Annotations Permissions:

Prizm Permissions for Site: Accusoft				
<input type="checkbox"/>	Group	DRM	DRM Permissions	Annotations Permissions
<input type="checkbox"/>	Accusoft Members	Disabled	None	None
<input type="checkbox"/>	Accusoft Owners	Disabled	None	Save/Load, Toolbar, Redaction
<input checked="" type="checkbox"/>	Accusoft Visitors	Enabled	Copy, Print	Save/Load, Toolbar, Redaction
<input type="checkbox"/>	Excel Services Viewers	Disabled	None	None

If a warning appears, see the Verifying Your Installation topic for information on how to resolve any issues.

5. The Edit Prizm Site Annotations Permissions window displays. Under Annotations Settings, select the desired sitewide annotations settings and permissions for the group(s). Check Save/Load, Annotations, or Redactions as desired:

Edit Prizm Site Annotations Permissions [X]

Groups
The DRM permissions of these groups will be modified.

PCC View Only Group

Annotations Settings
Choose the annotations settings that you want these groups to have.

Annotations Settings:
 Save/Load Annotations Redaction

OK Cancel

6. Click OK and your settings are saved. You will be able to view the new settings in the Annotations Permissions column on this page:

6.4.2 Configuring Annotations for a Document Library

To configure Annotations for a Document Library, follow these steps:

When you create permission settings at the Document Library level, they will override any permission settings created at the Site level.

1. Go to the Document Library where you want to configure annotations.
2. On the Library Tools tab, select Library.
3. Under Settings, select Prizm Library Permissions.
If the Prizm Library Permissions button is not available, you will need to enable Prizm Configuration Tools for the Site Collection.
4. The Prizm Permissions page for the document library displays. The table on this page shows the DRM permissions and annotations permissions that are currently set for each

group. Settings inherited from the site are prefixed with "Inherited:" Select one (or more) groups to configure for annotations and then select Edit Annotations Permissions.

If a warning appears, see the Verifying Your Installation topic for information on how to resolve any issues.

5. The Edit Prizm Document Library Annotations Permissions window displays. Under Annotations Settings, select the desired annotations settings and permissions for the group(s). To set annotation settings for the group(s) for the document library, select Override annotation settings for document library and then Check Save/Load, Annotations, or Redactions as desired:

Groups
The annotations permissions of these groups will be modified.

Accusoft Visitors

Annotations Settings
Choose the annotations settings that you want these groups to have.

Annotations Settings:

Inherit site settings:
Load, Save, Annotations

Override annotation settings for document library

Save/Load Annotations Redaction

OK Cancel

Otherwise, to have the library inherit settings from the site for the selected group(s), select Inherit site settings.

If no groups are selected when you select Edit Annotations Permissions, the Edit Annotations Permissions dialog will include a People Editor you can use to specify which groups the settings apply to.

6. Click OK and your settings are saved. You will be able to view the new settings in the Annotations Permissions column on this page.

6.5 Prizm Services Management

This section contains the following information:

- Configuring Prizm Global Configuration
- Implementing Tempcache Cleanup

6.5.1 Configuring Prizm Global Configuration

Prizm Global Configuration is an admin page that is part of PCC for SharePoint. This page is accessed through SharePoint Central Administration and permits configuration of settings that apply throughout the farm. These settings include the hostname and port of the PCCIS, as well as the location of the tempcache folder.

Accessing the Prizm Global Configuration Page:

1. Open the SharePoint Central Administration site in a web browser.
2. Click Application Management.
3. Under the group Prizm Content Connect for SharePoint, click Prizm Global Configuration:

PCCIS Settings Group

The group of settings under the title PCCIS permits you to configure how PCC for SharePoint communicates with PCCIS:

Prizm Global Configuration

Central Administration

- Application Management
- System Settings
- Monitoring
- Backup and Restore
- Security
- Upgrade and Migration
- General Application Settings
- Apps
- Configuration Wizards

Site Contents

PCC Services

These settings tell Prizm Content Connect for SharePoint how to communicate with the PCC Services.

Note: refer to the installation guide for a walkthrough of setting up a multi-server environment.

Search Terms Path

%ALLUSERSPROFILE%\Accusoft\Prizm\SearchTerms
c:\programdata\accusoft\prizm\searchterms or "\192.168.198.192\searchterms"

Web Service Scheme

http
https

Hostname

localhost
server.mydomain.com or "192.168.198.192"

Port

18681
"18681", "80", ...

Proxy Port

18680
"18680", "80", ...

Web Service Path

PCCIS/v1
"PCCIS/v1"

Tempcache Location

C:\ProgramData\Accusoft\Prizm\Cache
"c:\programdata\accusoft\prizm\cache" or "\192.168.198.192\tempcache"

OK

Search Terms Path

Use this to specify a search terms path on the PCC server to supply preloaded Search terms to the viewer. Please see the Prizm Content Connect help file for more information on this topic at <http://www.accusoft.com/manuals.htm>.

Web Service Scheme

Use this to define whether your site will communicate with PCC over HTTP or HTTPS.

Hostname

The hostname setting specifies the hostname of PCCIS.

By default the value of this setting is "localhost", which is appropriate for single-server topologies. In other words, "localhost" is an appropriate value when PCC is installed on the same server as SharePoint.

This setting can be set to the hostname or IP of another machine that hosts PCCIS in order to support a multi-server topology. However, setting up a multi-server topology requires some additional configuration of PCC. For more information on setting up a multi-server topology, see the Installation Guide.

This setting should not include a protocol, port number, or trailing slashes. The following examples are invalid values for this setting: "http://localhost", "pcc.mydomain.com/", and "pcc.mydomain.com:18680".

Port

The port setting specifies the port of PCCIS for handling the viewing of documents.

By default the value of this setting is "18681". In most cases this value will be appropriate. However, in rare cases you may need to change the port of PCCIS. If you change the port of PCCIS, then you will have to update this setting with the new port number.

Proxy Port

The port setting specifies the port of PCC's Proxy Server that handles conversion of documents to PDF with or without redaction.

By default the value of this setting is "18680". In most cases this value will be appropriate. However, in rare cases you may need to change the port of Proxy Server. If you change the port of Proxy Server, then you will have to update this setting with the new port number.

Tempcache Location

The tempcache location setting specifies the location of the tempcache folder. This value must be a fully qualified path to a directory. It supports UNC path names.

By default, the value of this setting is evaluated from "%allusersprofile%\Accusoft\Prizm\Cache". Typically, that expression will evaluate to "C:\ProgramData\Accusoft\Prizm\Cache", but it is dependent on the environment variables.

The default value is appropriate for single-server topologies. In other words, the default value is appropriate when PCC is installed on the same server as SharePoint.

To support multi-server topologies this setting can be changed to the path of a network share. The path must be valid and point to the same shared folder for all servers in the multi-server topology, including the PCC server.

Important! Permissions must be set correctly for the tempcache folder. If you are planning on changing the location of the tempcache folder used by PCC for SharePoint, you must set the appropriate permissions for that folder in addition to setting the tempcache location as described below.

The following permissions are required for the tempcache folder:

- The Prizm service account must have permission to modify the tempcache folder.
- Web application pool identities must have permission to modify the tempcache folder.
- For a guided walkthrough of setting up a multi-server topology and the tempcache, including setting the tempcache permissions, see the Installation Guide.

6.5.2 Implementing Tempcache Cleanup

Introduction

Over time, the tempcache will be filled with various renditions of documents, including both the original rendition of documents and converted renditions of documents. Both PCC for SharePoint and PCC will write to this folder, but neither is responsible for cleaning up old files in the folder. Tempcache cleanup is the process of maintaining the content of this folder.

Implementing tempcache cleanup requires defining a retention policy. The retention policy can define what conditions the files are kept in the tempcache and what conditions they are removed from the tempcache. A retention policy should balance performance, security, and storage considerations:

- Performance considerations essentially come down to the fact that if a document rendition is already in the tempcache, then no additional processing needs to be done to obtain the document.
- Security considerations are based around limiting the risk of unauthorized access to the tempcache. If files are held longer in the tempcache, then there is potentially more data exposed on unauthorized access to the tempcache.
- Storage considerations are based on the cost to store data.

A basic tempcache cleanup policy and implementation is defined below. These may be followed or you can choose a different implementation that better meets your needs:

Retention Policy

All documents will be removed from the tempcache after 24 hours, with a 1 hour grace period.

Cleanup Implementation

The Prizm Cache Manager tool can be used to implement the retention policy. This tool ships and installs with Prizm Content Connect and is located in the "CacheManager" folder of the Prizm installation directory, for example: C:\Prizm\CacheManager.

To implement the given retention policy with the Prizm Cache Manager, use the following settings:

- Directory: <your tempcache folder>
- Extensions: *.*
- Size limit: 10 GB
- Delete files older than: 24 hours
- Run cleanup every: 1 hour

6.6 Troubleshooting Tips

This section contains the following information:

- Verifying Your Installation
- Server Logs
- FAQs

6.6.1 Verifying Your Installation

This section outlines a few techniques for verifying the status of your installation. At this point you should have completed one of the guides for Installing PCC for SharePoint.

Before You Begin

Before you begin to verify your installation, clear files from the tempcache folder. Clearing the files from the tempcache folder will ensure that the full scope of product functionality is tested.

For Prizm Content Connect for SharePoint version 7.0 (and later), the default location of the tempcache is:

- %allusersprofile%\Accusoft\Prizm\Cache\. You can verify this is the location that your Prizm Content Connect for SharePoint installation is using, or you can change the location of the tempcache by following the instructions in the Configuring Prizm Global Configuration section.

Test 1: Manual View

1. Open a Document Library in Internet Explorer. The library must contain at least one document.
2. Login as a user that has permission to view the library.
3. Right-click on the name of the document in the Name column and select Copy shortcut from the Context menu. This will give a fully qualified URL for the document you are going to view.
4. Open a new browser tab or window.
5. In the URL bar enter the following:

```
http://<your_SharePoint_server>/_layouts/Accusoft/Prizm/ViewDocument.aspx?documentIdentifier= <fully_qualified_document_URL>
```

For Example:

```
http://mysp.mydomain.com/_layouts/Accusoft/Prizm/ViewDocument.aspx?documentIdentifier=http://mysp.mydomain.com/limited/1960sPhoto.jpg
```

6. The file that opens should open in a full screen iteration of PCC's HTML5 viewer.

If the viewer or the document does not display correctly, refer to the FAQ at <http://learn.accusoft.com/faq.html>.

Test 2: Check for Notifications

1. Open a site collection in Internet Explorer.
2. Log in as a site collection administrator.
3. Open Site Actions > Site Settings.
4. Under the section Site Collection Administration, click Site Collection Features.
5. Activate the feature Prizm Configuration Tools if it is not active.
6. Open Site Actions > Site Settings.
7. Under the section Prizm Configuration, click Prizm Site Permissions.
8. Look for notifications just below the ribbon. Address each notification as they may indicate a problem that will prevent correct functionality.

6.6.4 FAQs

Question:

I've enabled DRM for a group on a document library, but when a user of that group click's on the document name they are not redirected and are able to download the document.

Answer:

Check that the Prizm Digital Rights Management web application feature is activated.

Question:

I've enabled the Prizm Digital Rights Management web application feature but users are still able to download the document by clicking on the document name link.

Answer:

Check that DRM is turned on for the user group and library that you are testing with. This can be checked by opening the Prizm Library Settings page: open this from the Library Tools > Library Ribbon under the Settings group. From this page, you can check if DRM is turned on for the group on the library; if it is not you will need to enable it.

For additional answers to your frequently asked questions, refer to the FAQs section on our website at <http://learn.accusoft.com/faq.html>.