

# PlanetPress® Connect

OL™ Software

## Installation and Activation Guide

Version: 1.3.0

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Version 1.3.0

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# System Requirements

These are the system requirements for PlanetPress Connect1.3.0

## Operating System (64-bit only)

- Microsoft Windows 2008/2008 R2 Server
- Microsoft Windows 2012/2012 R2 Server
- Microsoft Windows Vista
- Microsoft Windows 7
- Microsoft Windows 8.1
- Microsoft Windows 10

Windows XP, Windows 2003 and older versions of Windows are not supported by PlanetPress Connect.

## Minimum Hardware Requirements

- NTFS Filesystem (FAT32 is not supported)
- CPU Intel Core i7-4770 Haswell (4 Core)
- 8GB RAM (10GB Recommended)
- Disk Space: At least 10GB (20GB recommended)

For tips and tricks on performance, see [Performance Considerations](#)

# Environment considerations

## VMWare Support

PlanetPress Connect supports VMWare Workstation, VMWare Server, VMWare Player and VMWare ESX infrastructure environments as software installed on the Guest operating system. PlanetPress Connect does not officially support VMotion under ESX at the moment.

Copying (duplicating) your VMWare Guest Machine and using it simultaneously constitutes an infringement of our End-User License Agreement.

While VMWare ESX, Workstation, Server and Player (from [VMWare, Inc.](https://www.vmware.com/)) are supported, other virtual environments (such as Microsoft Virtual PC, Parallels, Xen and others) are not supported at this time.

## Terminal Server/Service

PlanetPress Connect does not support Terminal Server (or Terminal Service) environment as possible under Windows 2000, 2003 and 2008. This is to say, if Terminal Service is installed on the server where PlanetPress Connect is located, unexpected behaviours may occur and will not be supported by Objectif Lune Inc.. Furthermore, using PlanetPress Connect in a Terminal Service environment is an infringement of our End-User License Agreement.

## Remote Desktop

Tests have demonstrated that you can use PlanetPress Connect through Remote Desktop. It is however possible that certain combination of OS could cause issues, if you encounter any please contact Support and we will investigate.

PlanetPress Connect 1.3 and above have been certified under Remote Desktop.

## 64-bit Operating Systems

PlanetPress Connect is a 64-bit software and can only be installed on 64-bit operating systems.

## Antivirus Considerations

- Antivirus software may slow down processing or cause issues if they are scanning in temporary folders or those used by PlanetPress Connect. Please see [KB-002: Antivirus Exclusions](#) for more information.
- Antivirus software might interfere with installation scripts, notably a vbs script to install fonts. McAfee, in particular, should be disabled temporarily during installation in order for MICR fonts to install and the installation to complete successfully.

# Windows Search Indexing Service

Tests have concluded that the Windows Search service, used to provide indexing for Windows Search, can interfere with Connect when installing on a virtual machine. If the installation hangs during the last steps, it is necessary to completely disable this service during installation.

- Click on Start, Run.
- Type in **services.msc** and click OK.
- Locate the **Windows Search** service and double-click on it.
- Change the **Startup Type** to **Disable**, and click **Stop** to stop the service.
- Try the installation again.
- Once completely, you may re-enable the service and start it.



# Database Considerations

This page describes the different considerations and pre-requisites for the database backend used by PlanetPress Connect, whether using the MySQL instance provided by the installer, or using your own.

## Using the MySQL Instance from the Installer

The MySQL Instance we provide in the [Installation Wizard](#) is already pre-configured with specific options that we have determined are necessary for the most stable setup.

These are the specific options that have been changed in our version of my.ini:

- **max\_connections = 200** : PlanetPress Connect uses *a lot* of database connections. This number ensures that even in high volume environments, enough connections will be available.
- **max\_allowed\_packet = 500M** : In some implementations, especially using Capture OnTheGo, large packets will be necessary to transfer binary files. This maximum packet size ensures that the data received by PlanetPress Connect can be stored in the database.
- **character-set-server = utf8 , collation-server = utf8\_unicode\_ci , default-character-set=utf8** : These indicate our database support for UTF-8/Unicode.

## Using your own MySQL Instance

If you already have a MySQL server instance and wish to use it, the following should be taken into consideration:

- The MySQL account must have access to all permissions using the GRANT Command, including creating databases.
- The database configuration must include the options indicated in the above section.
- The SQL instance must be open to access from other computers. This means the bind-address option should not be set to 127.0.0.1 or localhost.

# Network considerations

The following should be taken into consideration in regards to network settings and communications

- If a local proxy is configured (in the **Internet Explorer Options** dialog), the option **Bypass proxy server for local addresses** must be checked, or some features depending on local communication will not work.

# Language and Encoding considerations

Please note the following considerations:

- **Language:**
  - PlanetPress Connectis currently offered in 5 languages, between which you can switch in the Preferences dialog. These languages are: French, English, German, Japanese and Chinese (Traditional).
  - The PlanetPress Connect help system (this document) is only available in English.
- **Encoding:**
  - Issues can sometimes be encountered in menus and templates when running PlanetPress Connect on a non-English operating system. These are due to encoding issues and will be addressed in a later release.

# Performance Considerations

This page is a comprehensive guide to getting the most performance out of your PlanetPress Connect installation as well as rough guidelines indicating when it's best to upgrade.

## Performance Analysis Details

In order to get the most out of your installation, it's important to analyze your needs. This ensures that you are already getting the maximum possible performance in your current setup, before looking into hardware upgrades or performance packs. These guidelines will be helpful in extracting all the juice you can.

- **Job Sizes and Speed:** In terms of pure output speed, it's important to first determine what job size is expected, and adjust Scheduling Preferences accordingly. The basic rule is:
  - If processing a small number of very large records (when each individual record is composed of a large number of pages), more instances with an equal amount of speed units is better. For hardware, RAM and Hard Drive speeds are most important, since the smallest divisible part (the record) cannot be split on multiple machines or even cores.
  - If creating a very large number of small records (hundreds of thousands of 2-3 page individual records, for instance), a smaller number of instances with a large number of speed packs is better. As for hardware, then the number of cores becomes critical, whereas RAM and hard drive are secondary. Performance Packs, as well as the MySQL instance being separate, would be helpful if your most powerful machine starts struggling.
  - You can mix and match, such as one instance prioritized for large jobs and the rest for smaller, quicker jobs. Or the contrary. Or, whatever you want, really.
- **RAM Configuration:** By default, each instance of the Merge Engine and Weaver Engine is set to use 640MB of RAM. This means that regardless of speed units, if not enough memory is available, output speed might not be the one you expect. Assuming that the machine itself is not running any other software, the rule of thumb is the following: The total number of used memory in the machine should be pretty much the maximum available (around 95%). For each engine, it's necessary to modify the .ini file that controls its JAVA arguments. Edit the :
  - For the Merge Engine, see C:\Program Files\Objectif Lune\OL Connect\MergeEngine\Mergeengine.ini
  - For the Weaver Engine, see C:\Program Files\Objectif Lune\OL Connect\weaverengine\Weaverengine.ini
  - The parameters are -Xms640m for the minimum RAM size, -Xmx640m for the maximum RAM size. Explaining Java arguments is beyond the scope of this document. Please read references [here](#), [here](#) and [here](#) for more details (fair warning: these can get pretty technical!).

- **Template and data mapping optimization:** Some functionality offered by the Designer modules are very useful, and sometimes downright awesome, but can cause the generation of records and of contents items to slow down due to their nature. Here are some of them:
  - **Preprocessor and Postprocessor scripts:** manipulating data using a script may cause delays before and after the data mapping action has actually taken place, especially file conversion and data enrichment from other sources.
  - **Loading external and network resources:** In Designer, using images, javascript or css resources located on a slow network or on a slow internet connection will obviously lead to a loss of speed. While we do our best for caching, a document with 100,000 records which queries a page that takes 1 second to return a different image each time will, naturally, slow output generation down by up to 27 hours.
  - **External JavaScript Libraries:** While loading a single javascript library from the web is generally very fast (and only done once for the record set), actually running a script on each generated page can take some time. Because yes, JavaScript will run for each record, and often take the same time for each record.
  - **Inefficient Selectors:** Using very precise ID selectors in script wizards can be much faster than using a text selector, especially on very large documents. (more details on this in another upcoming page).
  - **Complex Scripts:** Custom scripts with large, complex or non-optimized loops can lead to slowing down content creation. While it is sometimes difficult to troubleshoot, there are many resources online to help learn about JavaScript performance and coding mistakes. [Here](#), [here](#), and [here](#) are a few. Note that most resources on the web are about JavaScript in the *browser*, but the greatest majority of the tips do, indeed, apply to scripts in general, wherever they are used.

## High-Performance Server Hardware

The following is suggested especially for high requirement server where speed is important. Before looking into a Performance Packs to enhance performance, ensure that the below requirements are met.

- **A physical, non-virtualized server.** ESX and VMWare servers are great for reducing the numbers of physical machines in your IT office, but they share all their hardware between each other. While you can create a virtual machine that seems as powerful as a physical one but it will still share between machines, and this will affect performance. It's a little like having a power bar plugged into a wall socket: you're not multiplying the power that's available, you're splitting it.
- **MySQL Database on a separate machine.** MySQL's main possible bottleneck is file I/O, and as such a high-performance setup will require this server to be on a separate machine, ideally with a high-performance, low-latency hard drive (a Solid State Drive, or SSD, will do wonderfully for this).

- **High-Quality 16+ GB Ram.** This is especially true when working with many server instances ("speed units") running in parallel. The more parallel processing, the more RAM is recommended.
- **4 or 8 physical cores.** We're not talking Hyper-Threading here, but physical cores. Hyper-Threading is great with small applications, but the overhead of "switching" between the virtual cores, and the fact that, well, they're virtual, means the performance is much lesser on high-power applications such as OL Connect. In short, a dual-core processor with Hyper-Threading enabled is not equivalent to a quad-core processor.

# Installation and Activation

This section provides detailed information about the installation and activation of PlanetPress Connect 1.3.0.

PlanetPress Connect 1.3.0 is comprised of 2 different installers: one for the PlanetPress Connect software and the other for PlanetPress Workflow 8.

## Where to Obtain the Installers:

The installers for PlanetPress Connect 1.3.0 and PlanetPress Workflow 8 can be obtained on DVD or downloaded as follows:

- If you are a **Customer**, the installers can be downloaded from the Objectif Lune Web Activations page: <http://www.objectiflune.com/activations>
- If you are a **Reseller**, the installers can be downloaded from the Objectif Lune Partner Portal: <http://extranet.objectiflune.com/>

For information on licensing, please see [Activating your license](#).

# Installation Pre-Requisites

- Make sure your system meets the [System requirements](#).
- Version 1.3.0 can be installed **under a regular user account with Administrator privileges**.
- You must install on an NTFS file system.
- In order to use the automation feature in Version 1.3.0, you need to install PlanetPress Workflow 8. This can be installed on the same machine as an existing PlanetPress® Suite 7.6 installation or on a new computer. For more information, please see [Information about PlanetPress Workflow 8](#).
- As with any JAVA application, the more RAM available, the faster the product will execute.

## Updating to PlanetPress Connect 1.2 via the Update Manager

In order for users of PlanetPress Connect 1.1 to upgrade to PlanetPress Connect 1.2 via the Update Manager it is necessary to install version 1.1.8 of the Objectif Lune Update Client.

If you do not have this installed already, the next time you run your Update Client it will show that there is an update available of itself to Version 1.1.8.

Simply click on the download button in the dialog to install the new version of the Update Client. Note that it is no problem to run the update while the Client is open. It will automatically update itself.

Once you have done this, PlanetPress Connect 1.2 will become available for download.

From PlanetPress Connect Version 1.2 onwards, the new version of the Update Client is included by default with the setups.

## Users of PlanetPress Connect 1.0:

Users of this version cannot upgrade directly to Version 1.2. This is because Version 1.0 is a 32 bit version of PlanetPress Connect and users must first upgrade to Version 1.1 and from there upgrade to Version 1.2.

The Update Client will first show the update to Version 1.1 and only afterwards the update Version 1.2.

If you are updating manually you must first upgrade to Version 1.1 and then after this upgrade to Version 1.2. If you go directly from Version 1.0 to Version 1.2 the installation will fail.



# Installing PlanetPress Connect on Machines without Internet Access

In order to install PlanetPress Connect it is necessary for the GoDaddy Root Certificate Authority to be installed (G2 Certificate) on the host machine and for this to be verified online. When a machine hosting the installation does not have access to the Internet, the installation will fail because the verification cannot be performed. To solve this problem you must first ensure that all Windows updates have been installed on the host machine. You then need to complete the following steps:

1. Go to <https://certs.godaddy.com/repository> and download the following two certificates to copy to the offline machine:
  - GoDaddy Class 2 Certification Authority Root Certificate - G2 - the file is gdroot-g2.crt
  - GoDaddy Secure Server Certificate (Intermediate Certificate) - G2 - the file is gdig2.crt
2. Install the certificates: Right mouse click -> Install Certificate, and follow the steps through the subsequent wizard.
3. Now copy the PlanetPress Connect installer to the offline machine and start the installation as normal

# Installation Wizard

## Starting the PlanetPress Connect installer

The PlanetPress Connect installer may be supplied as an ISO image or on a DVD:

- If an ISO image, either burn the ISO onto a DVD or unzip the contents to a folder (keeping the folder structure)
- If on a DVD, either insert the DVD and initiate the installation from there or copy the contents to a folder (keeping the folder structure)

You then need to navigate to the PlanetPress\_Connect\_Setup\_x64.exe or and double-click on it. After a while the Setup Wizard will appear to guide you through the installation steps.

## Selecting the required components

After clicking the Next button, the components screen appears, where the different components of PlanetPress Connect can be selected for installation. Currently, the following are available:

- **PlanetPress Connect Designer:** The [Designer](#) module. It may be used as a standalone with no other installed modules, but it will not have certain capabilities such as automation and commingling.
- **PlanetPress Connect Server:** The Server back-end giving capabilities such as automation, commingling, picking. It saves all entities generated from the Automation module into a database for future use.
- **MySQL Product:** The database used by the PlanetPress Connect Engine to save its items. This item is optional if an existing MySQL server, either on the same computer or a separate server, is to be used.
- **Installation Path:** This is the location where modules are to be installed.

The installer also allows you to calculate how much disk space is required for installing the selected components and to see how much space is available:

- **Disk space required:** Displays the amount of space required on the disk by the selected components.
- **Disk space available on drive:** Displays the amount of space available for installation on the drive currently in the Installation Path.
- **Recalculate disk space:** Click to re-check available disk space. This is useful if space has been made available for the installation while the installer was open.
- **Source repository location:** Displays the path where the installation files are located. This can be a local drive, installation media, or a network path.

## Selection Confirmation

The next screen simply confirms your selection. Click **Next** to start the installation.

# End User License Agreement

The next screen displays the [End User License Agreement](#), which needs to be read and accepted before clicking **Next**.

## MySQL Configuration

The **Default Database Configuration** screen only appears if the *MySQL Product* module was selected in the *Product Selection* screen. It defines the administrative password for the MySQL server as well as which port it uses for communication. Note that the installer will automatically configure the *Server* to use the supplied password and port.

- **MySQL user 'root' Password:** Enter the password for the 'root', or administration account, for the MySQL server. The password must be at least 8 characters long and contain at least one of each of the following: lower case character, upper case character, digit, punctuation character. When updating from an earlier version, you **must** enter the appropriate MySQL password or the update will fail. If the password is forgotten, the MySQL product must be uninstalled and its database deleted from disk before attempting to reinstall.
- **Confirm 'root' Password:** Re-enter to confirm the password. Both passwords must match for installation to continue.
- **TCP/IP Port Number:** The port on which MySQL will expect, and respond to, requests. A check is run to confirm whether the specified TCP\IP Port Number is available on the local machine. If it is already being used by another service (generally, an existing MySQL installation), the number is highlighted in red and a warning message is displayed at the top of the dialog.
- **Allow MySQL Server to accept non-local TCP connections:** Click to enable external access to the MySQL server. This is required if you need to access the MySQL Server from any other machine. It is also required if MySQL is on a separate machine than PlanetPress Connect.

Note: The last option may represent a security risk if the machine is open to the internet. It is recommended to ensure your firewall blocks access to port 3306 from external requests!

The **Database Connection** screen appears if the MySQL Product module was not selected. It defines the necessary information required to connect to an existing database.

- **Database Type:** Select the database type to use for the PlanetPress Connect Engine. Currently, only MySQL is supported.
- **Administrator Username:** Enter the username for a user with administrative rights on the database. Administrative rights are required since tables need to be created in the database. If accessing a database on a different machine, the server must also be able to accept non-local TCP connections, and the username must also be configured to accept remote connection. For example, the "root" MySQL user entered as root@-localhost is not allowed to connect from any other machine than the one where MySQL is installed.

- **Administrator Password:** Enter the password for the above user. You **must** enter the appropriate MySQL password or the installation or update will fail.
- **TCP/IP Port Number:** Enter the port on which the database server expects connections. For MySQL, this is **3306** by default.
- **Database Host Name:** Enter the existing database server's IP or host name
- **Server Schema/Table:** Enter the name of the MySQL database into which the tables will be created.
- **Test Connection:** Click to verify that the information provide above is valid by connecting to the database.

## PlanetPress Connect Server Configuration

The **Server Configuration** screen is where the *Server* component is configured.

- **Run Server as:** Defines the machine username and password that the **PlanetPress Connect Server** module's service uses. This account should be administrator on the local machine. Note that the [Server Security Settings](#) dialog can only be executed from the user specified here.
  - **Username:** The username the service uses to login. If the machine is on a domain, use the format domain\username and your domain password.
  - **Password:** The password for the set username.
  - **Validate user:** Click to verify that the entered username and password is correct and the service is able to login. This button *must* be clicked and the user validated for the **Next** button to be available.

Click **Next** to start the actual installation process. This process can take a few minutes.

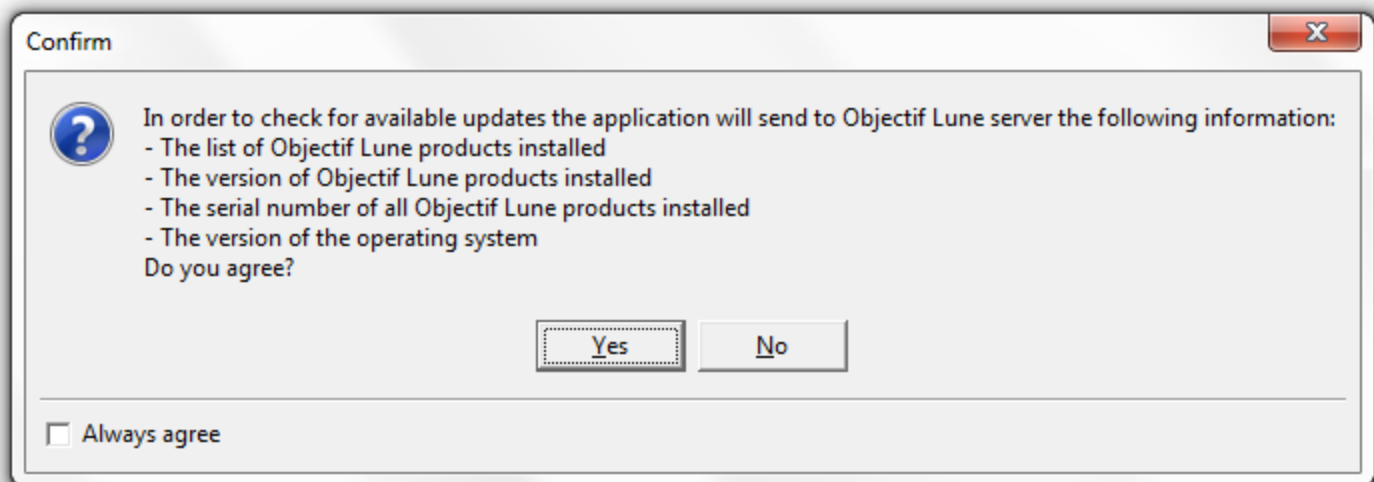
## Completing the installation

This screen describes a summary of the components that have been installed.

- **Configure Update Check:** Check this option to display the **Product Update Manager** after the installation is complete. This allows you to configure your installation to regularly check for updates to which you are entitled on the Objectif Lune Update Manager. Note that this checkbox may not be available in the event that an issue was encountered during the installation.
- **Show Log...** : If an issue was encountered during the installation, click this button to obtain details. This information can then be provided to Objectif Lune for troubleshooting.
- When you are ready click the "Finish" button to close the installation wizard, and, if selected, to initialise the Product Update Manager.

## The Product Update Manager

If the **Configure Update Check** option has been selected, the following message will be displayed when you click "Finish" in the setup:



Click “Yes” to install or open the Product Update Manager where the frequency with which the updates can be checked and a proxy server (if required) is specified. Note that if the Product Update Manager is already installed from another Objectif Lune application, it will be updated to the latest version and will retain any settings that were previously specified.

Select the desired options and then click **OK** to query the server and obtain a list of any updates that are available for your software.

- Note that the Product Update Manager can also be called from the “Objectif Lune Update Client” option in the Start menu.
- It can be uninstalled via Control Panel | Programs | Programs and Features.

## Product Activation

After installation, it is necessary to activate the software. See [Activating your license](#) for more information.

Before activating the software, please wait 5 minutes for the database to initialize. If the software is activated and the services rebooted too quickly, the database can become corrupted and require a re-installation.

# Information about PlanetPress Workflow 8

If you wish to use PlanetPress Workflow (automation) in conjunction with PlanetPress Connect, you will need to install PlanetPress Workflow 8 onto the same machine. Workflow 8 is provided through a separate installer which is available on CD or for download as follows:

- If you are a **Customer**, the installer can be downloaded from the Objectif Lune Web Activations page: <http://www.objectiflune.com/activations>
- If you are a **Reseller**, the installer can be downloaded from the Objectif Lune Partner Portal: <http://extranet.objectiflune.com/>

PlanetPress Workflow 8 can be installed in parallel on the same machine as an existing PlanetPress® Suite 7.x installation. Note however:

- If both versions need to be hosted on the same machine, PlanetPress Workflow 8 should always be installed after the legacy PlanetPress® Suite 7.x installation.
- When uninstalling PlanetPress Workflow 8, you may be prompted to repair your legacy PlanetPress® Suite 7.x installation.
- If PlanetPress Workflow 8 has been installed alongside PlanetPress® Suite 7, Capture can no longer be used with Workflow 7. The plugins are now registered uniquely to Workflow 8 and the messenger for Workflow 7 is taken offline. It is only then possible to use Capture from PlanetPress Workflow 8.
- PlanetPress Workflow 8 and PlanetPress® Workflow 7 cannot run simultaneously, since only one version of the Messenger service can run at a time. In fact, no 2 versions of PlanetPress Workflow can on the same machine simultaneously, whatever version is installed.
- It is possible to switch between different versions running by shutting down one version's services and then starting the other. However, this is not recommended. There are no technical limitations that prevent processes from previous PlanetPress Workflow versions (as far back as Version 4) to run on PlanetPress Workflow 8, removing the need to run both versions.

For more information on the licensing of Workflow 8, please see [Activating your license](#).

# Activating a License

PlanetPress Connect and PlanetPress Workflow 8 include separate 30 day trial periods during which it is not necessary to have a license for reviewing basic functionality. If you need an extension to the trial periods or require a license for specific functionality or plugins (e.g., the PReS Plugin for Workflow 8), you will need to request a new activation code.

## Obtaining the PlanetPress Connect Magic Number

To obtain an activation file, you first need to retrieve the OL™ Magic Number. The Magic Number is a machine-specific code that is generated based on the computer's hardware and software using a top-secret Objectif Lune family recipe. Each physical computer or virtual computer should have a different Magic Number, thus require a separate license file to be functional.

To get the PlanetPress Connect Magic Number, open the PlanetPress Connect Designer application:

- Open the **Start Menu**
- Click on **All Programs**, then **Objectif Lune**, then **PlanetPress Connect**
- Open the **PlanetPress Connect Designer [version]** shortcut.
- When the application opens, if it has never been activated or the activation has expired, the **Software Activation** dialog appears:
  - **License Information section:**
    - **Magic Number:** Displays the PlanetPress Connect Magic Number.
    - **Copy to Clipboard:** Click to copy the Magic Number to your clipboard. It can then be pasted in the activation request email using CTRL+V.
  - **Licensed Products section:**
    - **Name:** Displays the name of the application or module relevant to this activation.
    - **Serial Number:** Displays the activation serial number if the product has been activated in the past.
    - **Expiration Date:** Displays the date when the activation will expire (or the current date if the product is not activated)
    - **Web Activations:** Click to be taken to the online activation page (not yet functional).
  - **End-User License Agreement** (Appears only when loading a license file):
    - **License:** This box displays the EULA. Please note that this agreement is legally binding.
    - **I agree:** Select to accept the EULA. You must select this option to install the license.
    - **I don't agree:** Select if you do not accept the EULA. You cannot install the license if this option is selected.
  - **Load License File:** Click to browse to the .olconnectlicense file once you receive it.

- **Install License:** Click to install the license and activate the software (only available when a license file is loaded).
- **Close:** Click to cancel this dialog. If a license file has been loaded, it will not automatically be installed.

The **Software Activation** dialog can also be reached through a shortcut located in **All Programs**, then **Objectif Lune**, then **PlanetPress Connect** and is named **Software Activation**. Since it does not load the software, it is faster to access for the initial activation.

## Requesting a license

After getting the Magic Number, a license request must be done for both PlanetPress Connect and Workflow 8:

- If you are a **Customer**, you must submit your Magic Number and serial number to Objectif Lune via the Web Activations page: <http://www.objectiflune.com/activations>. The OL™ Customer Care team will then email the PlanetPress Connect license file to you.
- If you are a **Reseller**, you can create an evaluation license via the the Objectif Lune Partner Portal by following the instructions there: <http://extranet.objectiflune.com/>

Note that if you do not have a serial number, one will be issued to you by the OL Activations team.

Accepting the license will activate it, after which the PlanetPress Connect services will need to be restarted. Note that in some case the service may not restart on its own. To resolve this issue, restart the computer, or start the service manually from the computer's Control Panel.

## Activating PlanetPress Workflow 8

PlanetPress Workflow 8 uses the same licensing scheme as PlanetPress Connect. There are 2 ways of activating the license for Workflow 8 after you have saved it to a suitable location:

- If you only have PlanetPress Workflow 8 installed you can double-click on the license for the PlanetPress Workflow 8 License Activation dialog to open. Applying the license here allows you to activate all of the required Workflow 8 components.
- If you have both PlanetPress Workflow 8 and PlanetPress Connect installed, it will not be possible to double-click on the license file as this will always open the PlanetPress Connect Activations Tool. Instead you must open PlanetPress Workflow 8 manually and apply the license through its activations dialog.

## Activating PlanetPress Connect

To activate PlanetPress Connect, simply save the license file somewhere on your computer where you can easily find it, such as on your desktop. You can then load the license by double-clicking on it, or through the start menu:



- Open the **Start Menu**
- Click on **All Programs**, then **Objectif Lune**, then **PlanetPress Connect**
- Open the **PlanetPress Connect Designer [version]** shortcut. The “PlanetPress Connect Software Activation” tool displays information about the license and the [End-User License Agreement](#) (EULA).
- Click the **Load License File** button.
- Read the EULA and click I agree option to accept it.
- Click **Install License** to activate the license. The license will then be registered on the computer and you will be able to start using the software.

After installation message will appear warning that the Server services will need to be restarted. Just click OK to proceed.

# Upgrading from PlanetPress Suite 7.6

This document is intended for people who already received their upgrade to PlanetPress Connect. They should already have their new serial number(s) in hand and the PlanetPress Connect installers.

With the release of PlanetPress Connect, Objectif Lune's innovative new technology, existing users of PlanetPress Suite version 7 and 6 have the possibility to migrate to an introductory version of PlanetPress Connect called "PlanetPress Connect Print-Only".

This migration benefits existing users in many ways and has limited impact on their current processes and how they use PlanetPress Suite version 7 and 6.

This document provides information on the migration process and the requirements and considerations for existing PlanetPress Suite users to upgrade to the latest generation of our products.

PlanetPress Connect Print-Only is available for existing users of PlanetPress version 7 or 6 with a valid OL Care agreement. If you are using a previous version or are not covered by OL Care, please contact your reseller or your Objectif Lune Account Manager for more information.

## What does PlanetPress Connect Contain?

PlanetPress Connect is comprised of the following modules:

- PlanetPress Workflow 8. This is the natural evolution of PlanetPress® Workflow 7 (Watch, Office or Production). PlanetPress Workflow 8 is very similar to PlanetPress® Workflow 7 version but contains new features and has the ability to run PlanetPress Connect, PlanetPress Suite, PrintShop Mail and PReS Documents.
  - Imaging for PlanetPress Connect is available as an option. It contains:
    - PlanetPress Fax
    - PlanetPress Image
    - PlanetPress Search
  - PlanetPress Capture is still supported in PlanetPress Workflow 8 but only with documents created with the PlanetPress Design 7.
- PlanetPress Connect Designer. This is the design tool based on completely new technology. It is not backwards compatible and therefore cannot open PlanetPress Design 7 documents. *If you need to continue editing those documents you can keep doing so in PlanetPress Design 7.*
- PlanetPress Connect Server. This is the core of the Connect technology. This new module automates the merging of data with your new templates and generates the output. It is required for PlanetPress Workflow 8 to handle templates created with the PlanetPress Connect Designer. It can be installed on the same or a different machine as PlanetPress Workflow 8.

**IMPORTANT:** PlanetPress Connect does **not** contain the PlanetPress Design 7.

**GOOD NEWS:** PlanetPress Connect does not need any *printer licenses* to print from PlanetPress Connect or PlanetPress Suite. It can also print PrintShop Mail 7 and PReS 6 documents if these programs are licensed.

## You can keep everything you have

The first thing to know is that you can keep your current PlanetPress Workflow 7 configuration and your PlanetPress Design documents. When upgrading to PlanetPress Connect, they will remain functional.

Please note that PlanetPress Workflow 7 and PlanetPress Workflow 8 cannot run at the same time. See [Information about PlanetPress Workflow 8](#) for information about these limitations. The only exception is the PlanetPress Suite Design tool that you can continue to use as it is not part of PlanetPress Connect.

For customers upgrading to the free “Print only” version, if you wish you to continue your OL Care engagement, the next year will be priced at the same price as your current price.

For customer upgrading to the full version of PlanetPress Connect, with or without new options, the next year of OL Care will be priced at the value of the new software you upgraded to.

Before going into any further details, please read the following section carefully.

## PlanetPress Connect installation considerations

PlanetPress Suite could run by default on a computer with a minimum of 1GB of RAM available. The PlanetPress Connect Server with PlanetPress Workflow 8, by default, requires 8 GB of RAM but if you intend on using the new PlanetPress Connect Designer on the same computer, you should consider having at least 12 GB of RAM available. See [System requirements](#).

### Distributed installation or not

You can decide to install PlanetPress Connect modules all on the same computer or have each module on a different computer. Reasons for this could be:

- There is insufficient memory in the computer currently running PlanetPress Workflow 8 to also run PlanetPress Connect Server.
- You want to use a more powerful computer with more RAM and more cores to run the Server to achieve maximum performance.

# What do I gain by upgrading to PlanetPress Connect?

## PlanetPress Watch users

When upgrading to PlanetPress Connect, you receive key features of PlanetPress Office such as the following:

- Ability to input data from PDF
- Ability to print your PlanetPress Suite documents on any Windows printer (no need for printer licenses)
- Ability to create standard PDF output from your PlanetPress Suite documents
- Even if you don't recreate your existing PlanetPress Suite documents, you can easily change your workflow to convert your output to PDF, then output them in PCL to any device supporting it.

NOTE: If you were a PlanetPress Production user, you retain all functionalities within PlanetPress Workflow 8. These are automatically imported during the activation (see below).

## Re-purpose your existing documents

**IMPORTANT:** PlanetPress Suite users covered by a valid OL Care contract receive a “Print only” version of PlanetPress Connect which can produce printed output. If you also own PlanetPress Imaging, which can produce PDF, Tiff and other archive formats, you will also receive a new version.

The full version of PlanetPress Connect can open your company to the digital world by enabling you to send HTML responsive emails as well as creating dynamic responses and interactive web pages. All that for a minimal fee. For more information on the full version of PlanetPress Connect, contact your reseller or your Objectif Lune Account Manager.

## Upgrade to the full multi-channel version and expand onto the Web

If you choose to take the optional “multi-channel” upgrade, you can start right away to reuse the content of your existing documents and map it onto responsive documents that can be sent by email in full HTML glory and/or make them available as native HTML web pages using the latest CSS/JavaScript features.

**IMPORTANT:** If you owned them, you must also upgrade your Imaging modules to use the new PReS version.

## Create new documents and integrate them into your workflow at your own pace

You can start benefiting from the innovative technology of the new PlanetPress Connect Designer right away by designing new documents, or re-doing existing ones at your own pace. With PlanetPress Connect Print-Only, you can now:

- Use the new Data Mapper to easily map any input data into a clean data model that any designer person can use
- Easily create documents with tables that spread over multiple print pages, respecting widow and orphan rules, displaying sub-totals and totals properly
- Have text that wrap around images

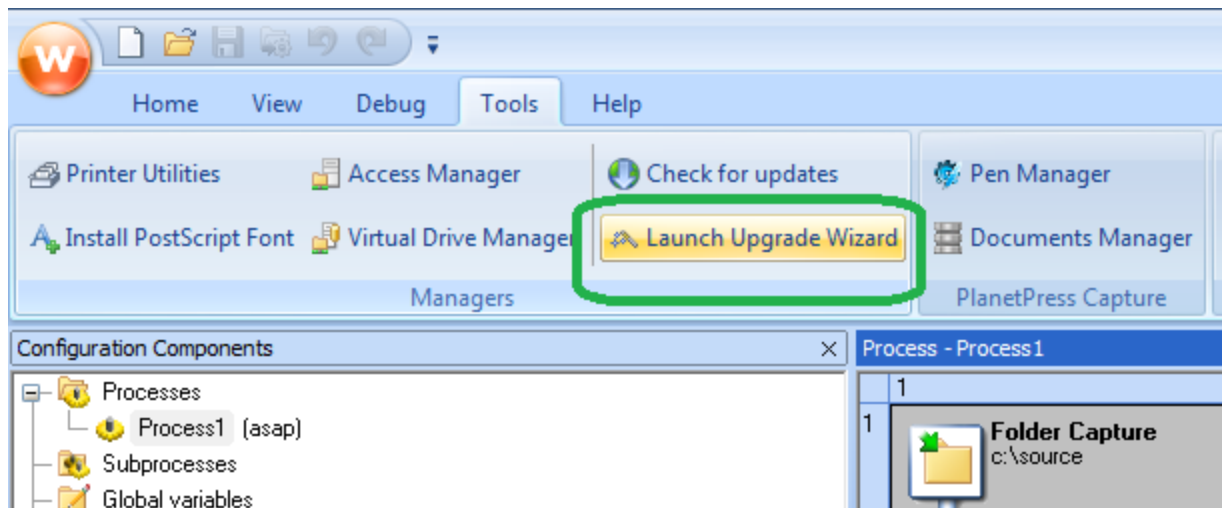
## Upgrade steps

1. To upgrade to PlanetPress Connect, the first step is to stop your PlanetPress Workflow services. You can do so from the PlanetPress Workflow configuration tool or from the Windows Service Management console.
2. Then, using the PlanetPress Connect setup, install the Designer and/or Server on the appropriate computers. Then, using the PlanetPress Workflow 8 setup, install PlanetPress Workflow and/or PlanetPress Image on the appropriate computers. (See the installation and activation document for more details)
3. If you installed PlanetPress Workflow 8 on the same computer where you had PlanetPress Suite Workflow 6 or 7, you can use the Upgrade Wizard to import your:
  - PlanetPress Workflow:
    - Processes configuration
    - PlanetPress Suite compiled documents
    - Service configuration
    - Access manager configuration
    - Custom plug-ins
  - PlanetPress Fax settings
  - PlanetPress Image settings
  - PlanetPress Search profiles
  - Printer activation codes
  - PlanetPress Capture database
  - PlanetPress Capture pen licenses
  - Custom scripts
  - Content of your virtual drive
  - PlanetPress Messenger configuration

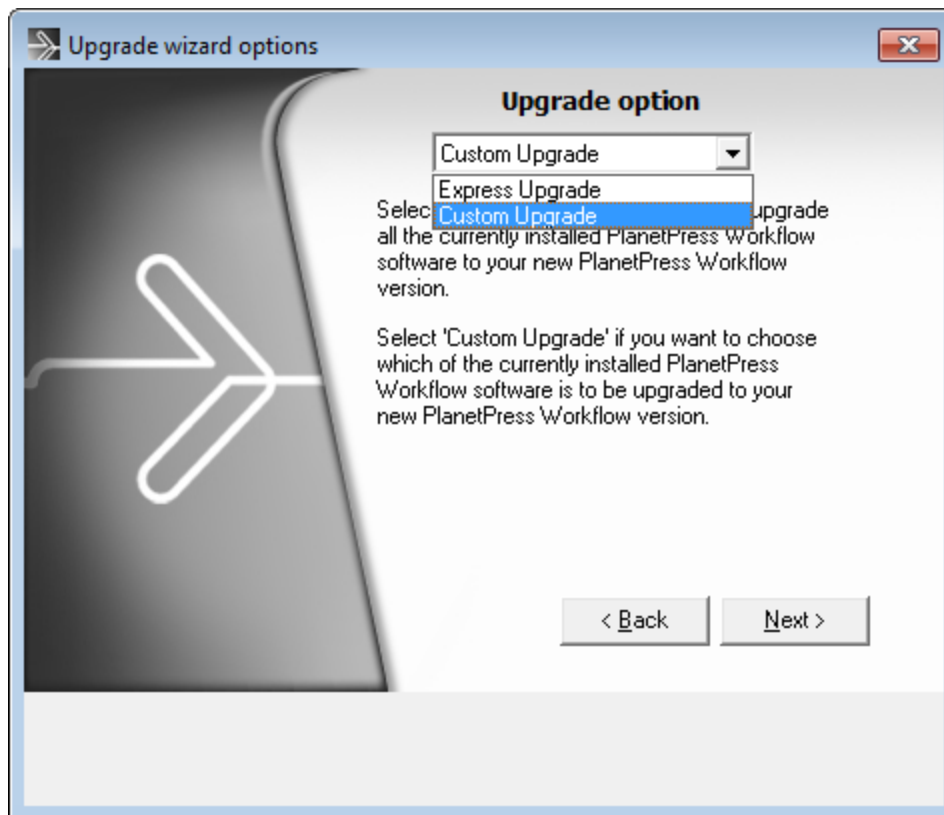
If you installed PlanetPress Workflow 8 on a different computer, contact support for help importing all those settings, if you wish to import them.

4. To launch the Upgrade wizard, open the PlanetPress Workflow 8 configuration tool and, from the Tools menu, launch the Upgrade Wizard.

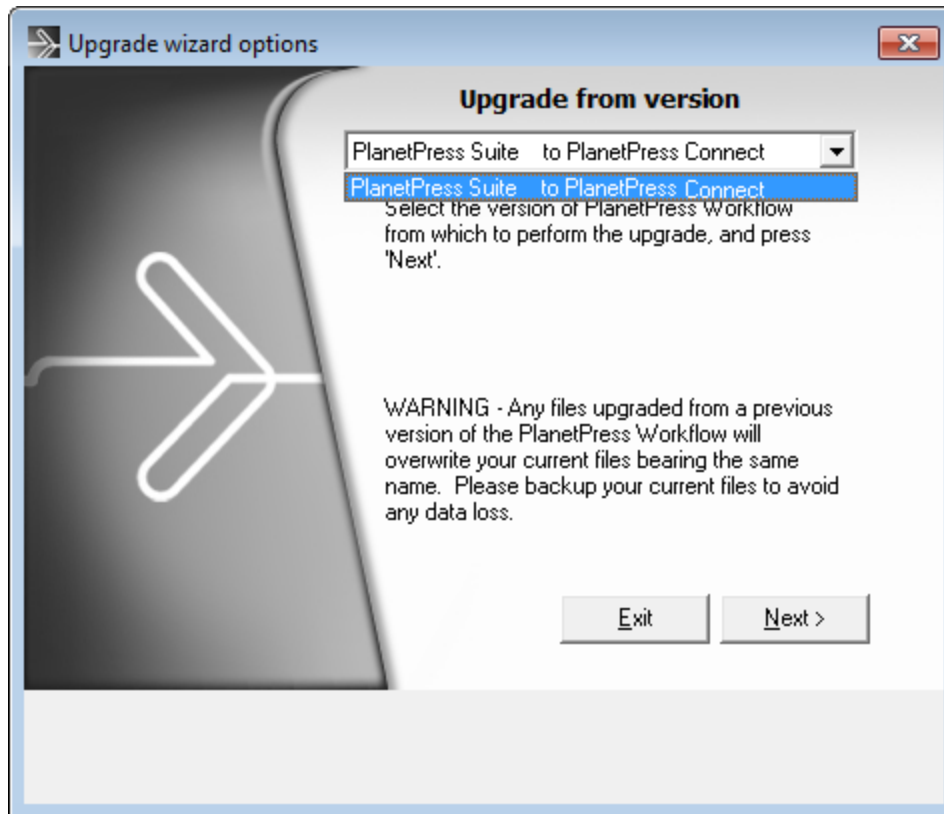
**IMPORTANT:** Before you start this process, make sure you have a backup of your current installation/computer.



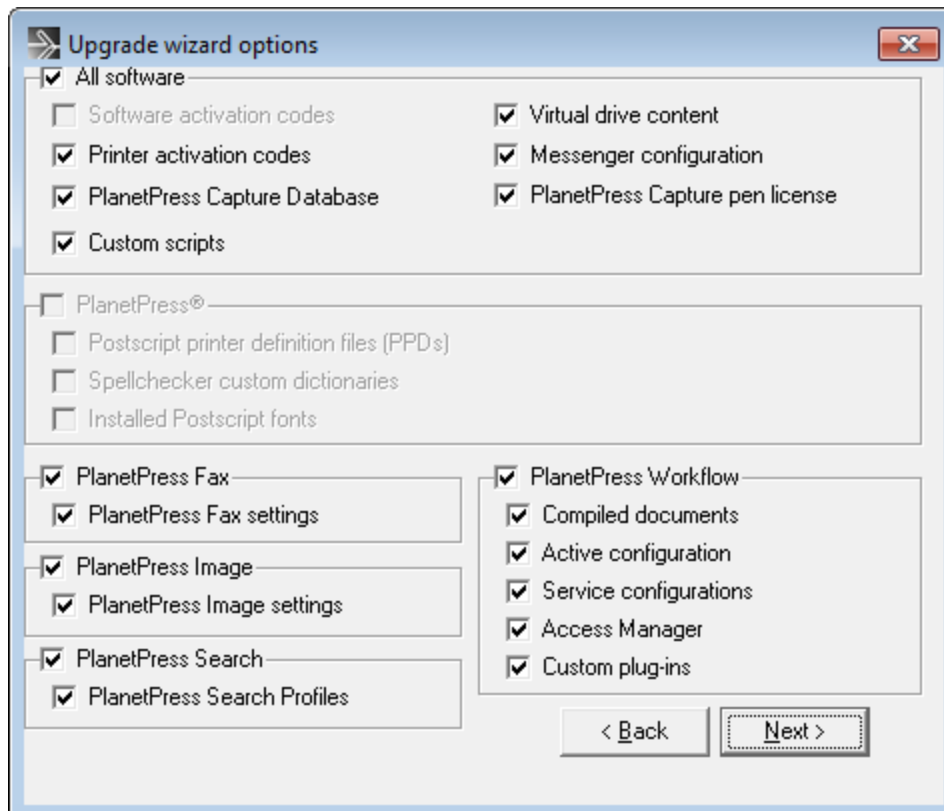
5. Then select your upgrade type:



6. Then select the product from which you wish to upgrade:

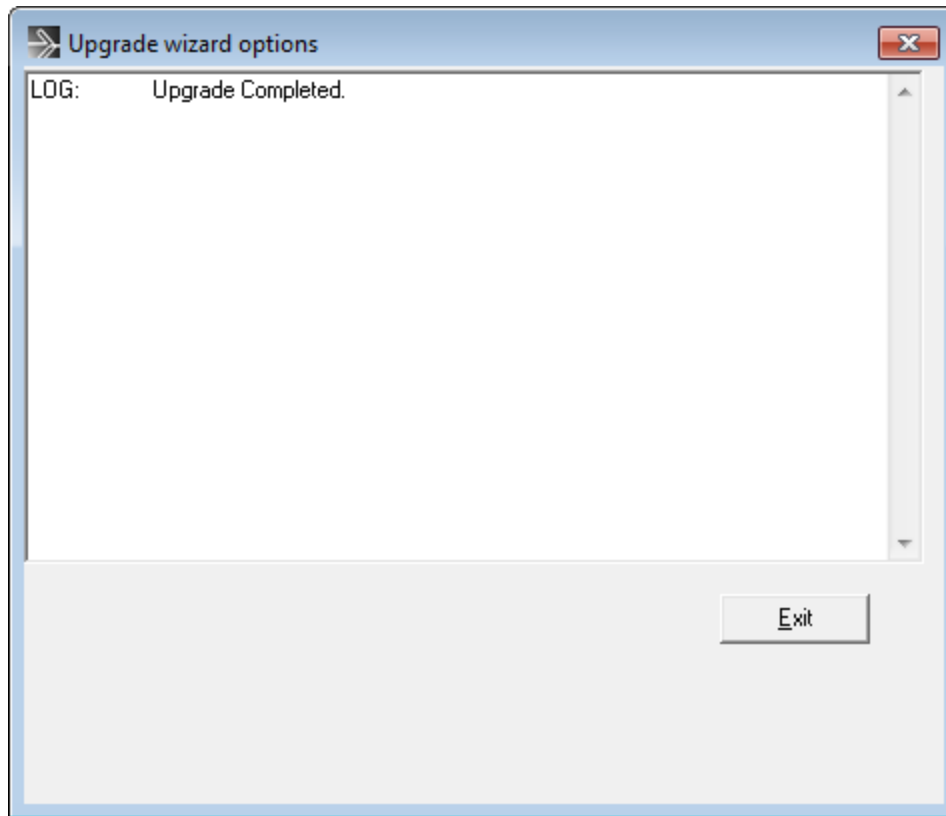


7. If you selected to do a Custom upgrade, select the required options:





8. Then finally review the log in the final dialog for details on how it went:



9. After that you will need to get the activation file for your product.

To obtain your activation, download the PlanetPress Connect installer from the [Web Activation Manager](#), follow the instructions for the installation using the serial number provided to you. You can activate your license through the Web Activation Manager.

10. From now on, if you need to modify your PlanetPress Design documents, simply open PlanetPress Design 6 or 7, edit your document and send the updated version to PlanetPress Workflow 8. In order to do that:
- If you have the PlanetPress Design on the same computer as the PlanetPress Workflow 8, you need to save the documents to PTK by using the "Send to" menu, then "PlanetPress Workflow", and there use the "Save to file" button. Then, from the PlanetPress Workflow 8 configuration tool, in the "Import" menu, select "Import a PlanetPress Document" and select the previously saved file.
  - If you have the PlanetPress Design on a computer and the PlanetPress Workflow 8 on another, you can simply use the "Send to" menu in the Designer and select the PlanetPress Workflow 8 to which you want to send the PlanetPress Design document.

# Updating PlanetPress® Connect version 1.0 to 1.1

Until now, PlanetPress® Connect has always been available in 32-bit version (aka x86). Starting in version 1.1, however, only the 64-bit version is available.

This change also affects the MySQL component, which means it is not possible to keep the database present and update PlanetPress® Connect's other components around it. Because it is necessary to uninstall MySQL 32-bit and install MySQL 64-bit, a database migration is required between these versions. Worry not, this step-by-step guide will help you do this quickly and effectively.

## Step 1: Backing up the MySQL Instance

- Navigate to the following folder in Windows Explorer: C:\Program Files (x86)\Objectif Lune\OL Connect\MySQL Product\MySQL\bin
- SHIFT+Right-click in an empty space in the folder and click "Open command prompt here"
- Run the following command in the command prompt:  
`mysqldump --all-databases > c:\temp\connect_dump.txt`  
Where "c:\temp" is an existing folder and "connect\_dump.txt" is the name of the file for the database file.

## Step 2: Update PlanetPress® Connect

- Use the Add/Remove Programs window in your operating system to uninstall the PlanetPress® Connect 1.0 software.
- The MySQL component can sometimes leave files behind, so delete the following folder: "C:\ProgramData\Connect\MySQL"
- Reboot the computer.
- Install PlanetPress® Connect 1.1.

## Step 3: Restoring the MySQL instance database

- Navigate to the following folder in Windows Explorer: C:\Program Files\Objectif Lune\OL Connect\MySQL Product\MySQL\bin
- SHIFT+Right-click in an empty space in the folder and click "Open command prompt here"
- Run the following command in the command prompt:  
`mysql -u root -p < c:\temp\connect_dump.txt`  
Where "c:\temp" is an existing folder and "connect\_dump.txt" is the name of the file for the database file.

# Migrating to a new computer

Currently there are no special migration tools to move data from one PlanetPress Connect installation to another. Instructions for migration will be available for later versions of the software.

# User accounts and security

## Permissions for PlanetPress Connect Designer

PlanetPress Connect Designer does not require any special permissions to run besides a regular program. It does not require administrative rights and only needs permission to read/write in any folder where Templates or Data Mapping Configurations are located.

If generating Print output, PlanetPress Connect Designer requires permission on the printer or printer queue to send files.

## Permissions for PlanetPress Connect Server

The PlanetPress Connect Server module, used by the *Automation* module, requires some special permissions to run. These permissions are set during installation, in the *Engine Configuration* section of the [Installation Wizard](#), but it can also be configured later by modifying permissions for the service. To do this:

- In Windows, open the Control Panel, Administrative Tools, then Services (this may depend on your operating system).
- Locate the service called `Serverengine_UUID`, where UUID is a series of characters that depend on the machine where the software is installed.
- Right-click on the service and select *Properties*.
- In the *Connection* tab, define the account name and password that the service should use. This can be a local account on the computer or an account on a Windows Domain. The account must have administrative access on the machine. It should also correspond to the user account set up in *PlanetPress Workflow*.

# Legal Notices and Acknowledgements

PlanetPress Connect, Copyright © 2015, Objectif Lune Inc. All rights reserved.

The license agreements for the associated open source third party components can be downloaded [here](#).

This application uses the following third party components:

- **Apache Javascript Support (Rhino) version 1.7.3** which is licensed under the terms of the Mozilla License Version 1.1. The source code can be obtained from the following location: <https://developer.mozilla.org/en-US/docs/RhinoDownload?redirect=no>
- **Adobe PDF Library** which is either a registered trademark or trademark of Adobe Systems Incorporated in the United States and/or other countries.
- **Adobe XMP Core** Copyright © 1999 - 2010, Adobe Systems Incorporated. All rights reserved.
- **Eclipse Persistence Services Project (EclipseLink)**, Copyright © 2007, Eclipse Foundation, Inc. and its licensors. All rights reserved. This is distributed under the terms of the Eclipse Public License Version 1.0 and Eclipse Distribution License Version 1.0.
- **Fugue Icons** by [Yusuke Kamiyamane](#) which are distributed under the terms of the [Creative Commons Attribution 3.0 License](#).
- **Gecko** which is distributed under the terms of the Mozilla Public License Version 2.0. Information on obtaining Gecko can be found on the following page: [https://wiki-mozilla.org/Gecko:Getting\\_Started](https://wiki-mozilla.org/Gecko:Getting_Started)
- **Glassfish Java Mail** which is licensed under the terms of the Common Development and Distribution License (CDDL) Version 1.0. Information on how to download the Glassfish source can be obtained from here: <https://wikis.oracle.com/display/GlassFish/Java+EE+7+Maven+Coordinates>
- **Hamcrest Matchers** Copyright © 2000-2006, www.hamcrest.org. All rights reserved.
- **HyperSQL**, Copyright © 2001-2010, The HSQL Development Group. All rights reserved.
- **ICU4J 4.4.2** Copyright © 1995-2013 International Business Machines Corporation and others. All rights reserved.
- **Jacob Java Com Bridge** which is licensed under the terms of the GNU Lesser General Public License Version 2. The source code for this can be obtained from the following location: <http://sourceforge.net/projects/jacob-project/files/jacob-project/>
- **JavaCraft JSch** Copyright © 2002 - 2012 Atsuhiko Yamanaka, JCraft Inc. All rights reserved.
- **JavaSysMon** Copyright © 2009 ThoughtWorks, Inc. All rights reserved.
- **JavaX Mail** which is distributed under the terms of the Common Development and Distribution License (CDDL) Version 1.1. The source code for this can be obtained from the following location: <https://java.net/projects/javamail/downloads/directory/source>
- **Jersey** which is distributed under the terms of the Common Development and Distribution License (CDDL) Version 1.1. Information on how to obtain the source code

can be found at the following location: <http://repo1.maven.org/maven2/org/glassfish/jersey/jersey-bom>

- **jersey-json-1.13** which is licensed under the terms of the Common Development and Distribution License (CDDL) Version 1.1. Information on how to obtain the source code can be found at the following location: <http://mvnrepository.com/artifact/com.sun.jersey/jersey-json/1.13-b01>
- **Jersey Multipart** which is distributed under the terms of the Common Development and Distribution License (CDDL) Version 1.1. Information on how to obtain the source code can be found at the following location: <http://repo1.maven.org/maven2/org/glassfish/jersey/jersey-bom>
- **JGoodies Forms, JGoodies Binding and JGoodies Looks**, Copyright © 2002-2013 JGoodies Software GmbH. All rights reserved.
- **JNA Version 3.5.1** which is distributed under the terms of the GNU Lesser General Public License Version 2.1. The source code for this can be obtained from the following location: <https://github.com/twall/jna/releases>
- **Junit** which is distributed under the terms of the Eclipse Public License Version 1.0. The source code for Junit can be obtained from the following location: <https://github.com/junit-team/junit/tree/master/src>
- **Mimepull** which is distributed under the terms of the Common Development and Distribution License (CDDL) Version 1.1. The source code for this can be obtained from the following location: <https://maven.java.net/content/repositories/releases/org/jvnet/mimepull/mimepull/>
- **Objectweb ASM**, Copyright © 2000-2011 INRIA, France Telecom. All rights reserved.
- **Relique CSV Driver** which is licensed under the terms of the Lesser General Public License Version 2.0. This can be obtained from the following location: <http://sourceforge.net/p/csvjdbc/code/ci/master/tree/>
- **Rhino 1.6R7 and 1.7R2** which are licensed under the terms of the Mozilla License Version 1.1. The source code for this can be obtained from the following location: <https://developer.mozilla.org/en-US/docs/RhinoDownload?redirect=no>
- **Saxon** which is distributed under the terms of the Mozilla Public License Version 2.0. The source code for this can be obtained from the following location: <http://sourceforge.net/projects/saxon/files/Saxon-HE/9.6/>
- **Servlet API** developed by Sun as part of the Glassfish project and licensed under the terms of the Common Development and Distribution License (CDDL) Version 1.0. Information on how to download the Glassfish source (as part of Java EE platform) can be obtained from here: <https://wiki.oracle.com/display/GlassFish/Java+EE+7+Maven+Coordinates>
- **Spring Framework** which is distributed under the terms of the Apache Software License Version 2.0. This product includes subcomponents with separate copyright notices and license terms.
- **Springsource JavaX Mail** which is distributed under the terms of the Common Development and Distribution License (CDDL) Version 1.0. The source code for this can be obtained from the following location: <http://ebs.s->

[pring-](#)  
[source.-](#)

[com/repository/app/bundle/version/detail?name=com.springsource.javax.mail&version=1.4](http://com/repository/app/bundle/version/detail?name=com.springsource.javax.mail&version=1.4).

- **Springsource SLF4J 1.6.1**, Copyright © 2004-2008 QOS.ch. All rights reserved.
- **Web Services Description Language for Java** which is distributed under the terms of the Common Public License v 1.0. The source code for this can be obtained from the following location: <http://wsdl4j.cvs.sourceforge.net/viewvc/wsdl4j/>
- **XULRunner** which is distributed under the terms of the Mozilla Public License Version 2.0. The source code for this can be obtained from the following location: <http://ftp.mozilla.org/pub/mozilla.org/xulrunner/releases/latest/source/>
- **zzilib** which is licensed under the terms of the Mozilla License Version 1.1. The source code for this can be obtained from the following location: <http://sourceforge.net/projects/zzilib/files/zzilib13/>
- **7-Zip SFX** which is licensed under the terms of the GNU Lesser General Public License Version 2.1. The source code for this can be obtained from the following location: [http://www.7zsfx.info/files/7zsd\\_src\\_160\\_2712.7z](http://www.7zsfx.info/files/7zsd_src_160_2712.7z)

Portions of certain libraries included in this application which are distributed under the terms of the Mozilla Public License have been modified. To obtain copies of the modified libraries please contact your local Objective Lune Support team.

This application also uses the following components which are distributed under the terms of the **Apache Software License Version 2.0**:

- Apache Ant
- Apache Axis
- Apache CFX
- Apache Commons Beanutils
- Apache Commons CLI
- Apache Commons Codec
- Apache Commons Collections
- Apache Commons Configuration
- Apache Commons DBCP
- Apache Commons Discovery
- Apache Commons FileUpload
- Apache Commons Imaging
- Apache Commons IO
- Apache Commons Lang
- Apache Commons Logging
- Apache Commons Net
- Apache Commons Pool
- Apache Commons VFS
- Apache Derby
- Apache Felix and dependencies
- Apache Geronimo
- Apache Jakarta HttpClient

- Apache Log4j
- Apache Neethi
- Apache OpenCMIS
- Apache POI
- Apache ServiceMix
- Apache Tomcat
- Apache WSS4J
- Apache Xalan
- Apache Xerces2 Java Parser
- Apache XMLGraphics
- Apache XML-RPC
- Barcode4j
- Google Collections
- Google GSON
- Jetty
- LMAX Disruptor
- OPS4J Pax Web
- org.json.simple
- Spring Dynamic Modules
- StAX
- XMLBeans

#### **Eclipse Technology:**

This Software includes unmodified Eclipse redistributables, which are available at [www.eclipse.org](http://www.eclipse.org). The Eclipse redistributables are distributed under the terms of the Eclipse Public License - v 1.0 that can be found at <https://www.eclipse.org/legal/epl-v10.html>.

#### **VSS Java FreeMarker:**

This product includes software developed by the Visigoth Software Society (<http://www.visigoths.org/>).

This includes the following subcomponents that are licensed by the Apache Software Foundation under the Apache License, Version 2.0:

- freemarker/ext/jsp/web-app\_2\_2.dtd
- freemarker/ext/jsp/web-app\_2\_3.dtd
- freemarker/ext/jsp/web-app\_2\_4.xsd
- freemarker/ext/jsp/web-app\_2\_5.xsd
- freemarker/ext/jsp/web-jsptaglibrary\_1\_1.dtd
- freemarker/ext/jsp/web-jsptaglibrary\_1\_2.dtd
- freemarker/ext/jsp/web-jsptaglibrary\_2\_0.xsd
- freemarker/ext/jsp/web-jsptaglibrary\_2\_1.xsd

#### **Java Advanced Imaging:**



This application uses Java Advanced Imaging which is part of the Java SE framework and platform and which is distributed under the terms of the Oracle Binary Code License Agreement for the Java SE Platform Products and Java FX. Copyright 2013, Oracle America, Inc. All rights reserved. Use is subject to license terms. ORACLE and JAVA trademarks and all ORACLE- and JAVA-related trademarks, service marks, logos and other brand designations are trademarks or registered trademarks of Oracle in the U.S. and other countries.

#### Further Components:

- This product includes software developed by the **JDOM Project** (<http://www.jdom.org/>).
- Portions of this software are copyright © 2010 **The FreeType Project** ([www.freetype.org](http://www.freetype.org/)). All rights reserved.
- This product includes software developed by **JSON.org** (<http://www.json.org/java/index.html>).

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