

# **PlanetPress Connect Installation and Activation Guide**

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# System and Hardware Considerations

## Language and Encoding considerations

Please note the following considerations:

- **Language:**
  - PlanetPress® Connect is currently only available in English language. Future versions will offer a translated user interface in many different languages.
  - The PlanetPress® Connect help system (this document) is only available in English.
- **Encoding:**
  - Issues may 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.



# Installation and Activation

## Installation and Activation

This section provides detailed information about the installation and activation of PlanetPress® Connect 1.2.0.

PlanetPress® Connect 1.2.0 is comprised of 2 different installers: one for the PlanetPress® Connect software and the other for PlanetPress® Connect Workflow 8.

### Where to Obtain the Installers:

The installers for PlanetPress® Connect 1.2.0 and PlanetPress® Connect 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 1.2.0 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 1.2.0, 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.

## 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.

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.
- **Administrator Password:** Enter the password for the above user.
- **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

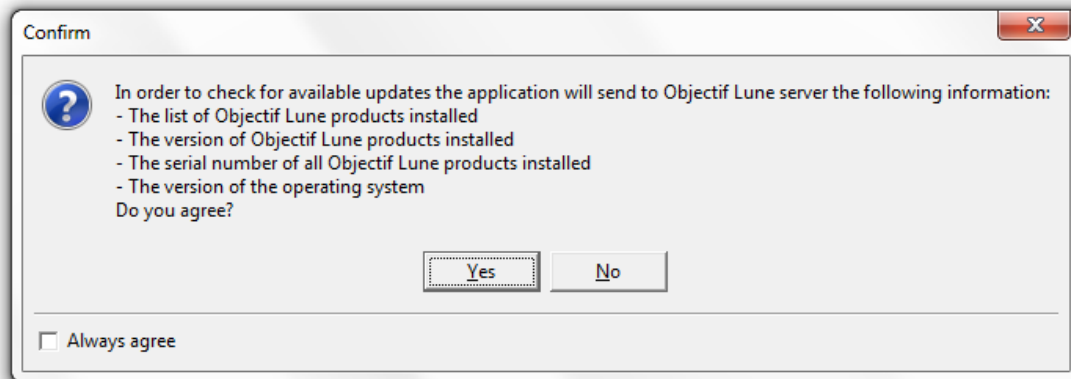
This screen describes a summary of the components that have been installed.

- **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.

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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.

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## 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.

## 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**

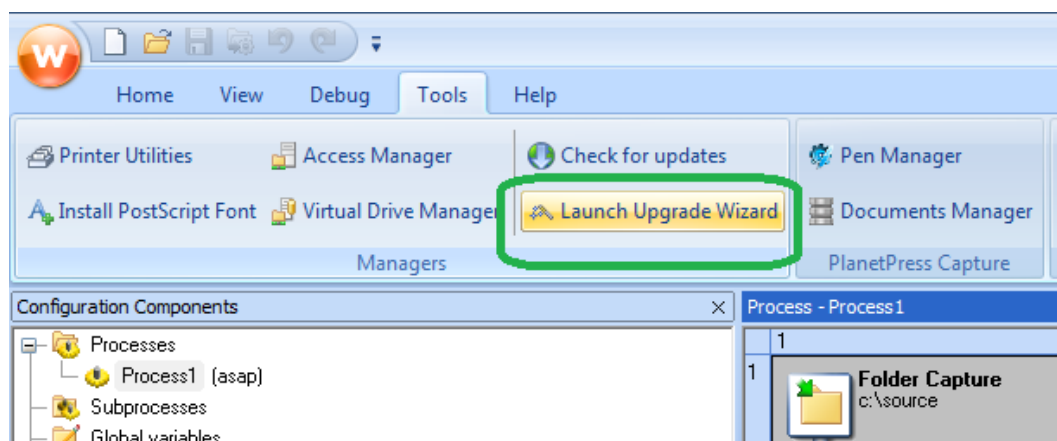
1. To upgrade to PlanetPress® Connect, the first step is to stop your PlanetPress Workflow services. You can do so from the PlanetPress Workflow configuration tool or from the Windows Service Management console.
2. Then, using the PlanetPress® Connect setup, install the Designer and/or Server on the 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.

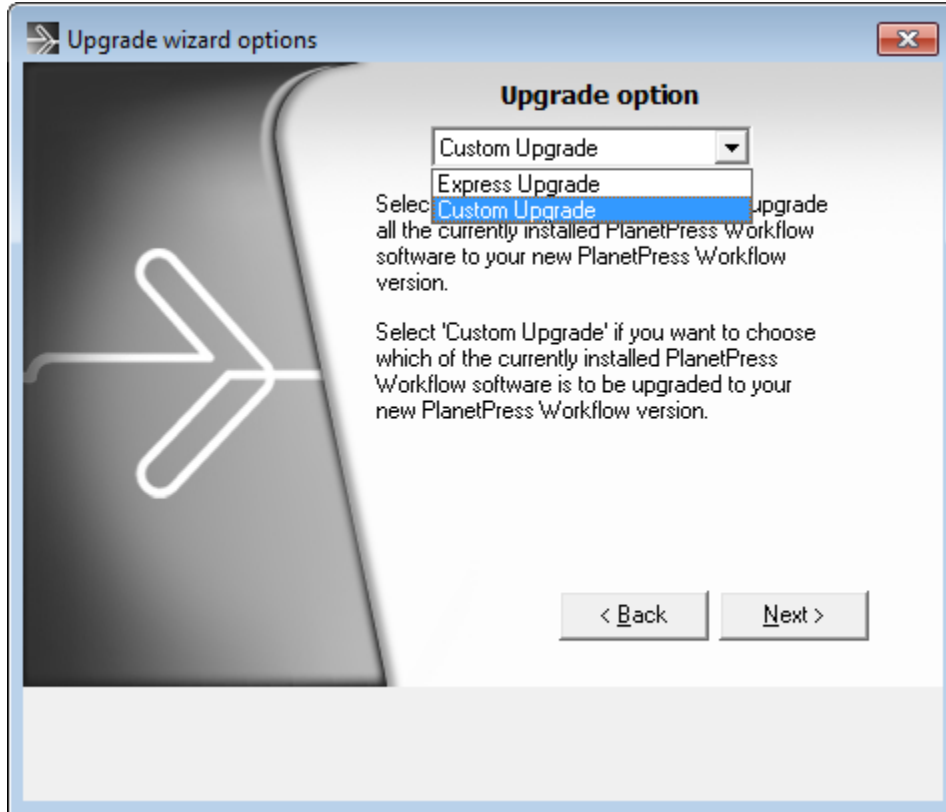
4. To launch the Upgrade wizard, open the PlanetPress® Workflow 8 configuration tool and, from the Tools menu, launch the Upgrade Wizard.

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

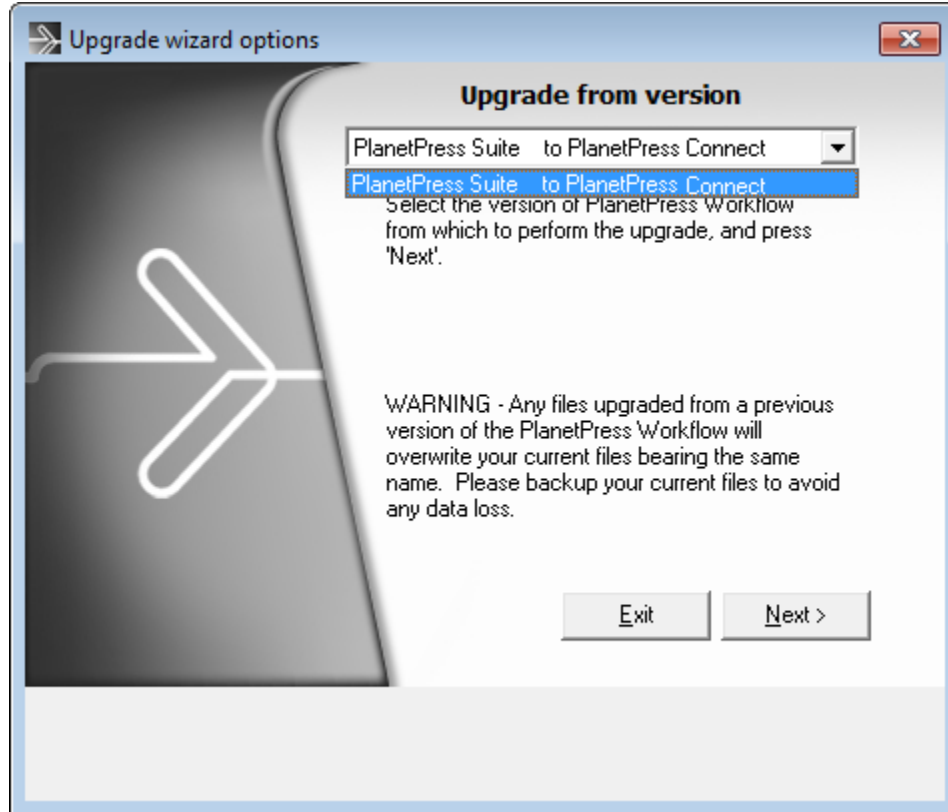


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5. Then select your upgrade type:



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



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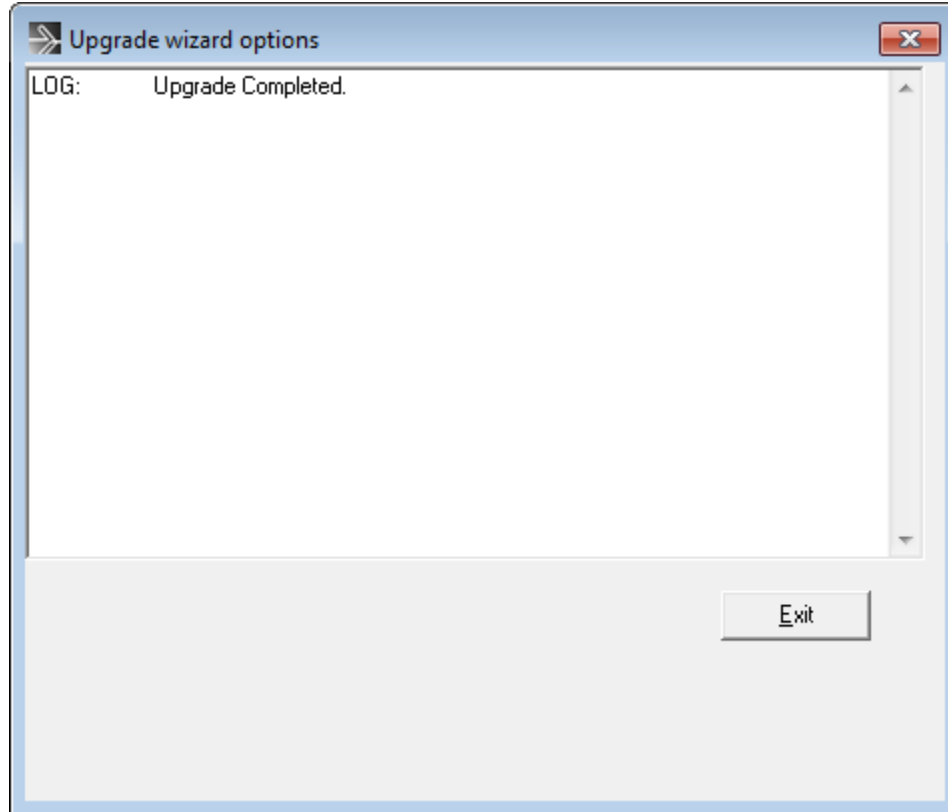
7. If you selected to do a Custom upgrade, select the required options:

**Upgrade wizard options**

- All software
  - Software activation codes
  - Printer activation codes
  - PlanetPress Capture Database
  - Custom scripts
  - Virtual drive content
  - Messenger configuration
  - PlanetPress Capture pen license
- PlanetPress®
  - Postscript printer definition files (PPDs)
  - Spellchecker custom dictionaries
  - Installed Postscript fonts
- PlanetPress Fax
  - PlanetPress Fax settings
- PlanetPress Image
  - PlanetPress Image settings
- PlanetPress Search
  - PlanetPress Search Profiles
- PlanetPress Workflow
  - Compiled documents
  - Active configuration
  - Service configurations
  - Access Manager
  - Custom plug-ins

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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.

## 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*.