MediaRich®

ECM for SHAREPOINT

MediaRich ECM

6.2

Quick Start Set Up Guide

Quick Start Installation and Configuration

This document provides information for completing a basic installation and configuration of the MediaRich for SharePoint Connector. This requires the installation and configuration of the MediaRich CORE Server, which provides the seamless visualization of all the file types and the on-demand media processing capabilities.

Upon completion of the installation process described in this document, your organization's users will be able to experience enriched digital asset management capabilities within your SharePoint sites. With the easy InstantOn activation, your sites will immediately provide MediaRich functionality.

MediaRich CORE Server Installation

The MediaRich CORE Platform is designed for deployment across a shared network. A shared network deployment also allows the server to receive requests from Web servers utilizing MRLs, generate the requested image from an original source file, and return the image to the Web browser.

The following sections provide basic information for installation of the MediaRich CORE server in preparation to connect to SharePoint. For more information about the installation and configuration of the MediaRich CORE server, refer to the *MediaRich CORE Installation and Administration Guide*.

System Requirements for MediaRich CORE Server

Minimum recommended configuration for imaging, documents, office applications (no heavy video transcoding, 4k or UHD video transcoding):

- Dual 3+ GHz Intel® Xeon Sandy Bridge and later processors
- 8 GB memory
- Microsoft Windows Server 2012R2 and later
- Microsoft Internet Information Services® (IIS) and ASP.NET with Sub-components

Minimum recommended configuration when processing large HQ videos such as 4k, UHD or 1080P, images, multi-page documents (Bare metal is highly recommended for video transcoding!):

- 8 Core Intel Xeon Sandy Bridge and later
- Dedicated MediaRich Server 8 Core License in shared cache configuration
- Dedicated cache volume 4 x 250 GB Disk 15K SAS RAID-10
- OS-Volume 2x150 GB/SAS/10K mirror
- 32 GB Ram

Additional Pre-Installation Requirements

Before proceeding with this installation, you will need the following resources:

- The domain, name, and password of the Service User account you will use for running the MediaRich for SharePoint services

  The following rights are required for this Service User:
  - "Log On as a Service" rights
  - Read/write access to the MediaRich Core shared folder called "BatchOut"
  - Read/write access to Windows SharePoint Foundation services
  - Local Administrator access on the server(s) on which it will be installed.

- The shared folder that you will use.

  If you are installing only one MediaRich Core Server, use the default location, MediaRichCore/Shared. If you have already installed a MediaRich Server and created a network share for that shared folder, you can select it by using the MediaRich Administration tool to edit local.properties.

- The location of the BatchOut folder

  It is easier for users to access generated files if this is a shared folder on a network, and has an intuitive name. After creating the share, be sure to give read/write permission to all users of the batch processing feature as well as the MediaRich service user.

- The License File you received from Equilibrium, copied to the Machine / Server and extracted (unzipped).

Running the MediaRich Server Installer

The MediaRich CORE installer is supplied as a standard Windows installer package. To begin the installation, double-click the installer package to run it. The installer guides you through the installation process.

> *Important:* If you choose to run MediaRich CORE as a specific Service User, be aware that, for security reasons, this dialog does not check the validity of either the account name or the password. It only checks the password against itself so that you can be assured that it was entered correctly. This dialog does not guarantee that the password itself is the correct one or that the account name you choose has adequate permissions.

The Windows installer can install MediaRich for the following languages: English, German, French, and Dutch.

To install the MediaRich on a Windows server:

1. Run the Server Setup with Admin Privileges.

   The Setup will request a User Account.

2. Use the User you created for the MediaRich Server.

   For example, <Domain>\User and the Password.

3. When the installer completes the process, perform the initial configuration in the MediaRich CORE Administration Utility.

Initial Configuration

After you first install MediaRich CORE server, complete the following tasks to enable the system:

1. Launch MediaRich CORE administration tool.

   You can double-click **MediaRich CORE Admin** in the Equilibrium\MediaRich CORE Admin folder or select **Start > All Programs > Equilibrium > MediaRich > MediaRich Core Administration**.

2. Log in using the default credentials: User `admin`, Password `admin`.

3. When the User Interface appears, select **Install a License File**.

4. Locate and select the unzipped license file.

5. Click the **Configure** button to open the MediaRich Server Options dialog.

6. Check if the Virtual Drives point to the drives you want to use for the Server Cache:

   - VideoProxy: file location for the preview Clips
   - batchout: target location for the MediaCart Results
   - merchandizer (no changes needed)
   - mrdocs (no changes needed)
   - pyramid: file location for the Pyramid Zoom files
   - annotations: file location for annotation data

     > *Important:* This is the storage for all MediaRich ECM for SharePoint annotation data. You should make sure this is stored at a secure location and backed up regularly.

7. Click **Start Server**.

   If the three indicators are green, the Server portion of the installation was successful.
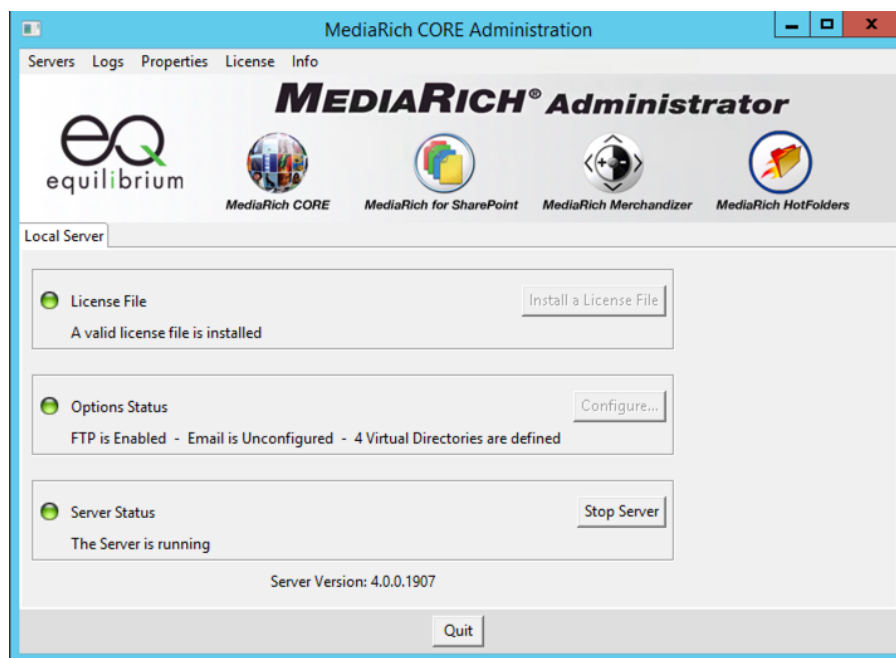
Figure 1: Successful start of the server

> **Note:** You can make additional configuration changes and additions after you verify a successful installation. To make these changes, you must stop the server. Click **Stop Server**; the status of the server will change when the server is stopped.

8. Click **Logon to "Local Server"**.

   When you are logged in to a server you have full permission to perform any administrative functions. The first time you log in using the MediaRich CORE administration utility, use the default of `admin` (lower case only) for both the username and password. Be sure to change these defaults so that you can restrict access to authorized personnel only.

MediaRich Connector Installation

The MediaRich for SharePoint Connector installs the MediaRich for SharePoint Web Parts and other associated localization files, and the MediaRich for SharePoint administration site. Upon completion of the install and configuration, eligible users also have access to InstantOn™. This provides SharePoint users with the ability to activate the robust MediaRich enabled visualization, search enhancements, device and browser independence capabilities, and digital asset management on nearly any SharePoint document or asset library by simply enabling InstantOn in any library.

Prerequisites for Connector Installation

To complete the Connector installation you must have the following information:

- The host name or IP address of the MediaRich for SharePoint server(s)
- The SharePoint administrator ID and password

- The SharePoint site collections where you will be activating MediaRich for SharePoint features

The installer will deploy a solution (.wsp file) to your SharePoint farm and make changes to the web.config files on your SharePoint servers. While the risk of a problem is low, it is always good idea to make backups of the web.config files prior to beginning any solution deployment. This will provide for an easy rollback if there is a problem, and is well worth the investment of a few minutes.

> *Important:* Before you begin an install of the SharePoint Connector, verify with your SQL DBA team that you have a recent backup of your content databases. If you have only a few site collections, you can also make a site collection backup using the STSADM tool or Powershell.

For a successful installation the user that will execute the setup must have the following special privileges:

- Local Administrator at any WebFrontEnd Server and at the Server where the central Administration from SharePoint is "hosted"
- DB-Owner and Security Admin privileges at any involved MS-SQL Database (configuration databases and content databases)
- Membership in the Farm Administrators Group
- Matching privileges to the Microsoft Setup User as described within the Best Practice for the least privilege, (rights) Installation.

> *Important:* Make sure to match the Microsoft Setup User as described within the Best Practices for the least privileges (rights) for Installation. Complete installation will not be possible unless the correct permissions are available. It is common for a developer to simply use their own login, which might have access to a portion of these areas, but not all that is needed. This will result in an incomplete installation.

Installing the Connector

MediaRich for SharePoint Connector is installed on a 64-bit SharePoint server where the Central Administration is installed. Copy the Connector Installer to this Server.

> *Important:* The installation must start at the Server where the Central Administration is installed. The SharePoint Server Service "Microsoft SharePoint Foundation-Web application" must be started at this Server. During the Installation an IISRESET is executed.

If you are deploying the SharePoint Connector to a stand-alone (single server) SharePoint farm, you can use the installer wizard to complete the installation. If you are deploying to an environment with multiple front ends, you can begin the install with the wizard and complete the installation with manual solution import and deployment tasks. Refer to the *MediaRich for SharePoint Installation and Administration Guide* for information about manual deployments for multiple-server farms.

Before you begin the installation, open the SharePoint administration web page (Start > Programs > Microsoft SharePoint (2013 or 2016) Products > Microsoft (2013 or 2016) Central Administration) and take note of the port number embedded in the URL for this web page. For example, consider this typical URL for the admin page:

```
http://2k3entr2x64:37799/default.aspx
```

In this case, the port number is 37799.

To install the Connector:

1. Login to the system with the Setup User.
2. Start the Setup of the connector with admin privileges.
3. Follow the installer prompts.

MediaRich Administration Site Setup

When the installer completes, it opens the MediaRich for SharePoint Administration page.

The user performing the administration site setup must be an administrator for the SharePoint site collection where MediaRich is to be a user. Also, the user must be a local administrator on the SharePoint server.

Click the **install** link for each port on which you want to install MediaRich for SharePoint; the default is SharePoint 80. This creates the sites and templates for MediaRich.

When the solution is deployed, you can then launch the **MediaRich Administration tool** from the Start menu.
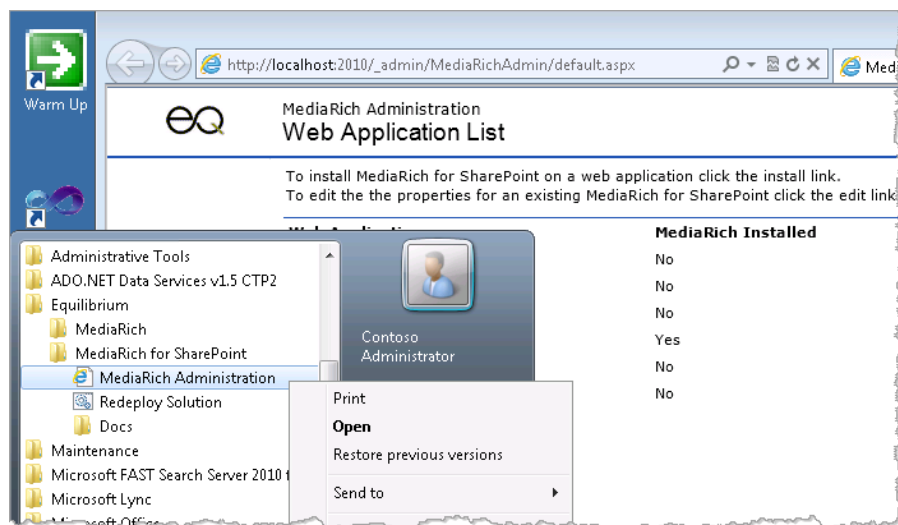
Figure 2: Accessing the MediaRich Administration Tool

When the installer completes, it opens the MediaRich for SharePoint Administration page.

> *Important:* The user performing the administration site setup must be an administrator for the SharePoint site collection where MediaRich is to be used; additionally the user must be a local

administrator on the SharePoint server.

Click the **install** link for each application/port where you want to install MediaRich for SharePoint; the default is SharePoint 80. This creates the sites and templates for MediaRich.
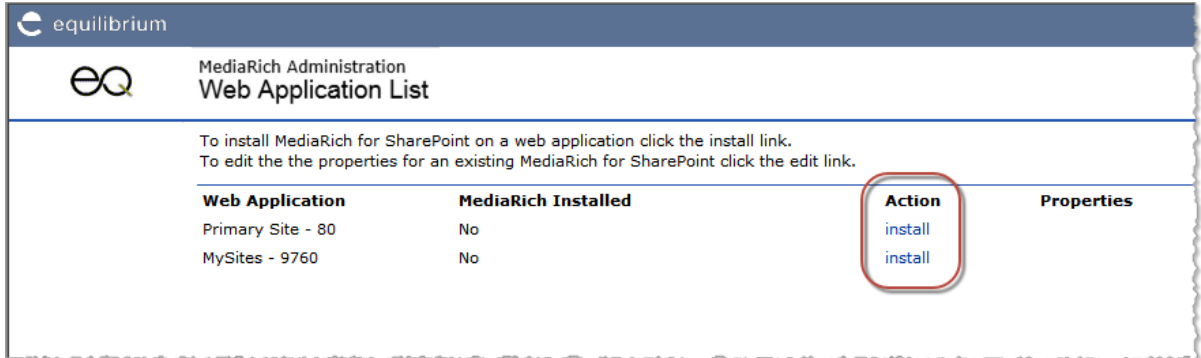

Figure 3: Web Applications List

Specifying the MediaRich for SharePoint Server

When configuring MediaRich properties, you will be prompted to enter the IP address or hostname of the MediaRich Server(s). Requests for image processing are sent to these servers. You can enter multiple servers, separated by a comma, and MediaRich will balance the load across the specified servers. If you use a DNS server, the hostname must be resolved.

Figure 4: Specifying the server

Important: Make sure that activated firewalls do not block the port used by the MediaRich . The default port is 9877, with both inbound and outbound IP Traffic allowed.

Although that the value defaults to "localhost:9897" on the first installation, please remember that running MediaRich CORE and the MediaRich SharePoint Connector on the same server is not recommended.
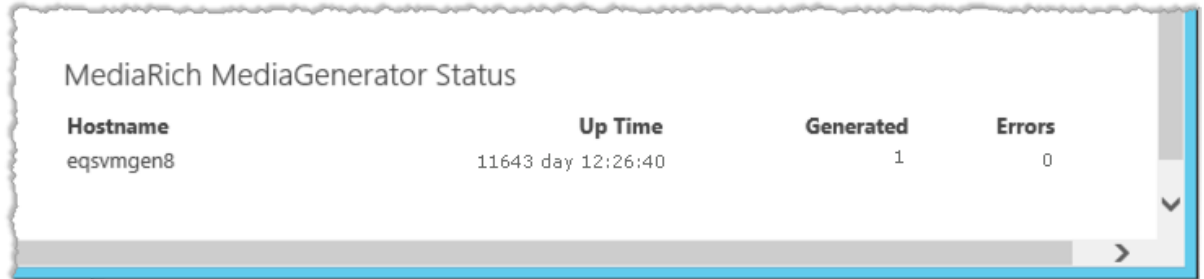
You must specify the user name and email address for the administrator (collection owner). See "Email Properties" on page 21 for more information. Click **OK** when the settings are complete.

Administrative properties

In the MediaRich Properties Editor, you can accept the default settings. These properties can be changed at a site collection level at a later time, according to the business / technical requirements. However, to setup initial MediaRich functionality, check the Quality settings for the Video Preview to ensure it meets your initial requirements.

At the bottom of the page, you can verify that a connection is established to the MediaRich Server.

Figure 5: Verifying the server connection

Click **Save** to retain the settings prior to leaving page.

Run an IISRESET at any WFE Server.

Verifying the MRUPLOAD Virtual Directory

In some cases the MRUPLOAD virtual directory, which is necessary for the "MediaBatch Uploader" feature, is not created with the setup. Check that this Virtual Directory exists by opening the IIS-Manager and selecting the Site that contains the MediaRich Image Workspace.
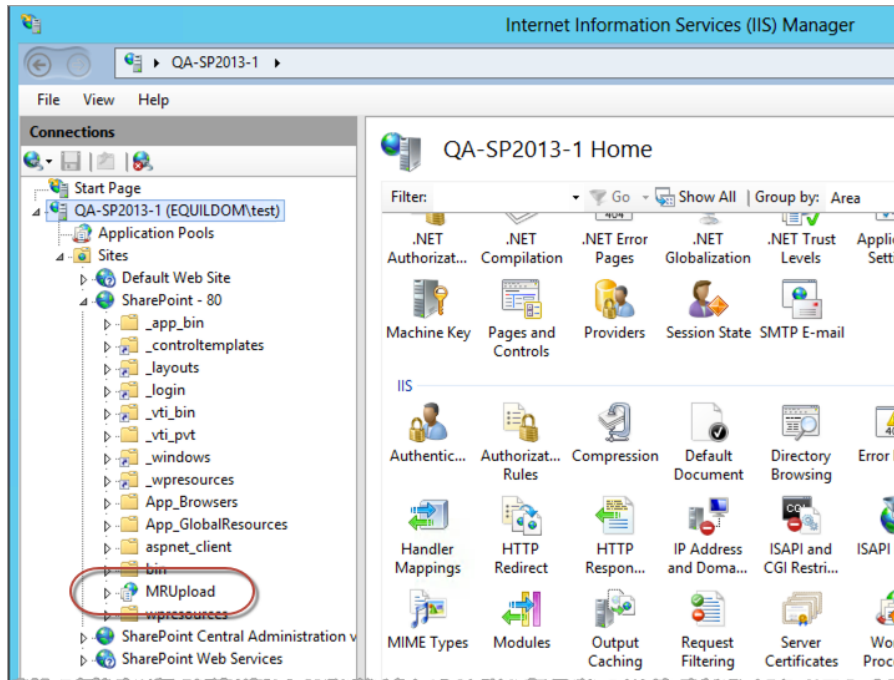
Figure 6: Verifying the MRUPLOAD directory

If there is no directory named MRUpload, you have to create this virtual directory.

To create the MRUPLOAD directory:

1. Right-click in the site window and select **Add Virtual Directory**.
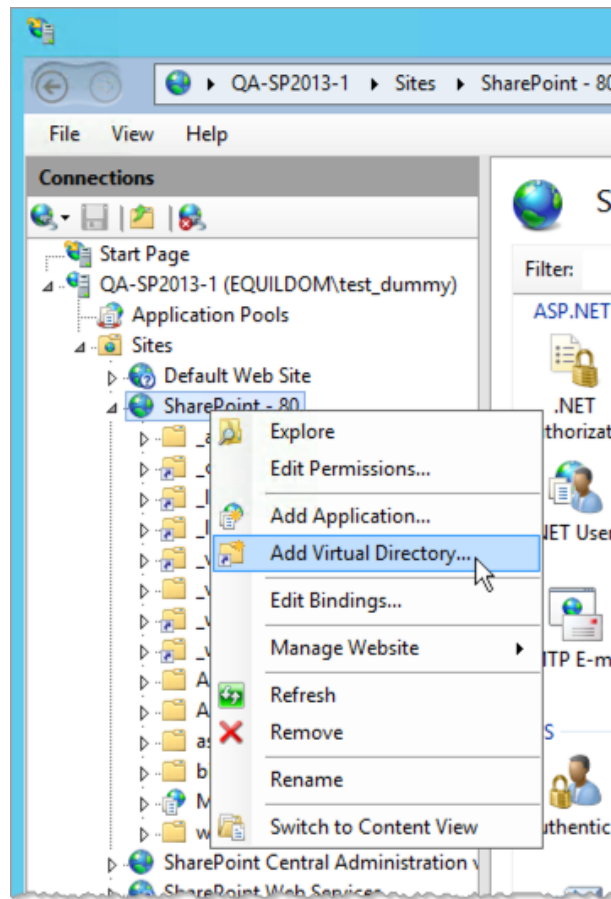
Figure 7: Adding the virtual directory

2. In the Add Virtual Directory dialog, specify the alias ("MRUPLOAD") and the MRUpload Physical Path.

   ..\15\TEMPLATE\LAYOUTS\MediaRich\Upload
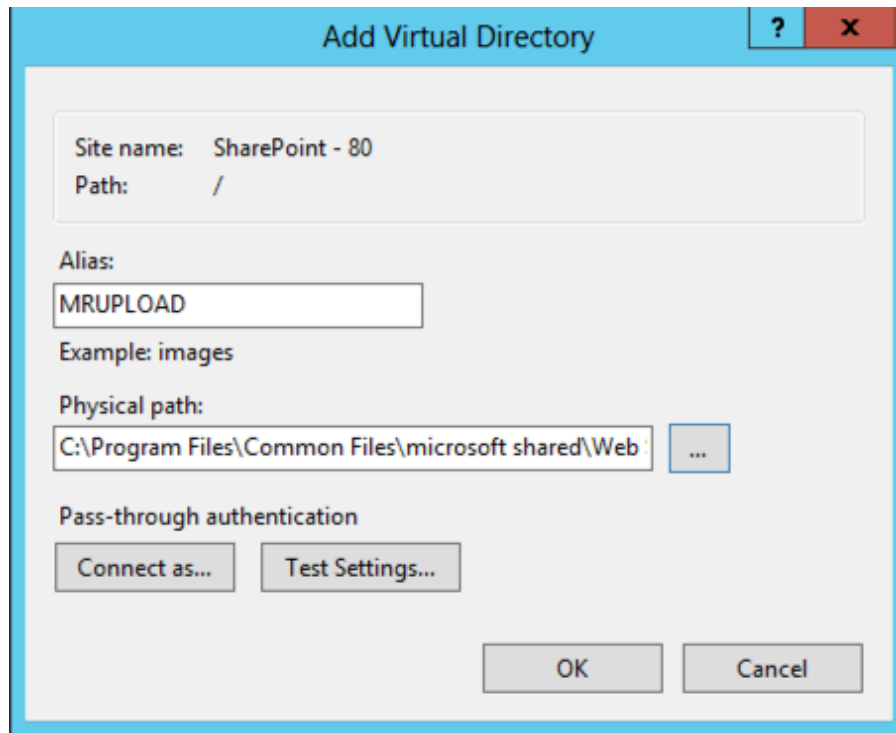
Figure 8: Specifying the alias and path

3. Click **OK**.

> *Important:* On Installations with several WFE Servers, this must be done for each one—that is, for all Sites that contain the "MediaRich Image Workspace."

Adding MIME Types

Occasionally, you will need configure IIS to accommodate specific file types that aren't supported out of the box, such as MPEG 4 videos.

To add MPEG video to MIME types:

1. Launch the IIS Manager.

2. Right-click the Web application(s) on which you have installed (or will install) the SharePoint Connector.

3. Double-click Mime Types.
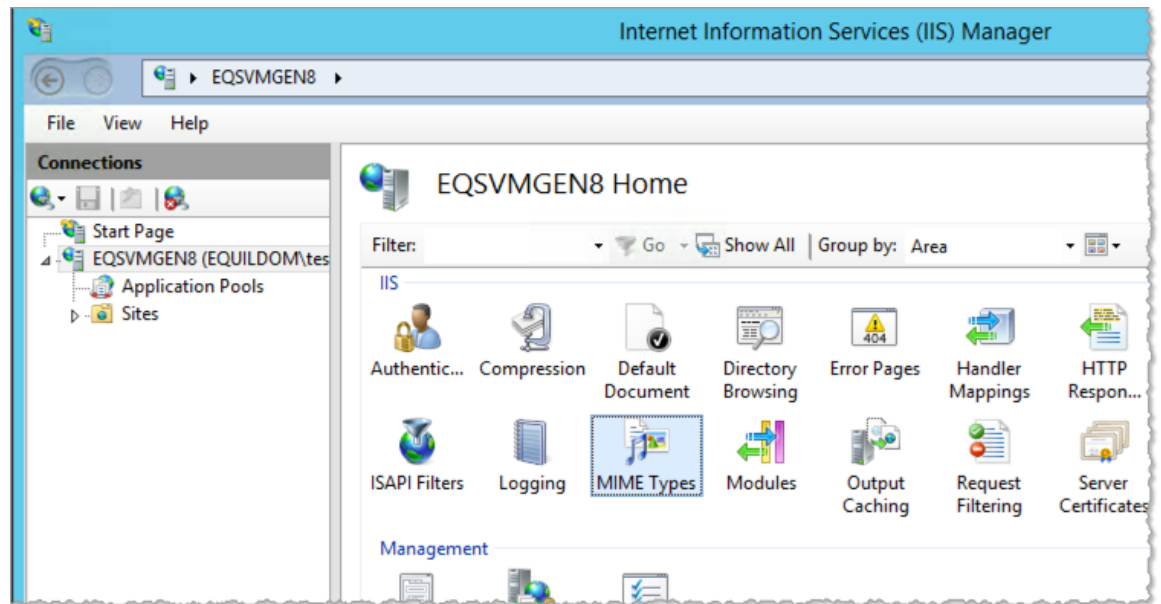
Figure 9: Open the MIME Types

4. Review the list of file types.

   If the file type is not listed, click **Add..** under **Actions**.

5. In the Add MIME Type dialog, enter a file name and extension.

   - Enter the File Name Extension, such as ".mp4".
   - Enter the MIME Type, such as "MPEG-4".
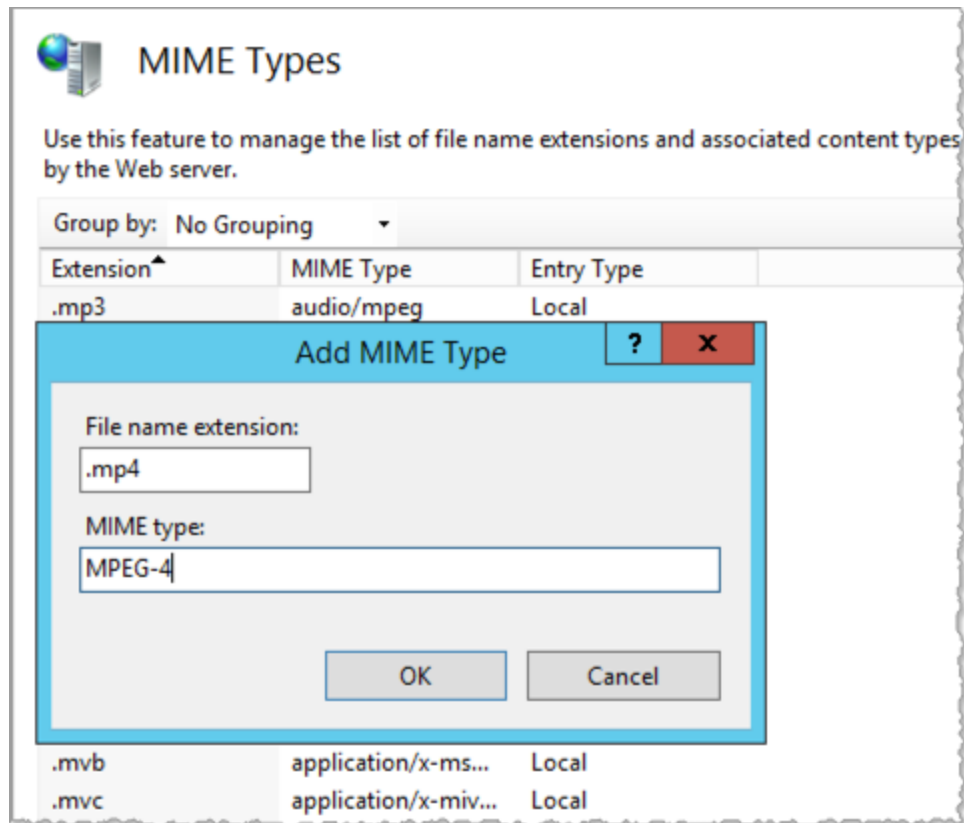
Figure 10: Adding MIME Types

6. Click **OK**.

MediaRich Subsite Installation

The default MediaRich SharePoint Connector installation creates a single top-level MediaRich web site shared by all users on the application. You can add independently controlled MediaRich installations to any top-level site on the application, so that one application can have multiple sites. Each top-level site where MediaRich was installed has its own properties list, which is used by MediaRich document libraries, and Web Parts located within that site collection. For large-scale users, this allows customization of MediaRich on a per-site basis.

Figure 11: Site Collection List

It is STRONGLY recommended that you perform a subsite installation for the following reasons:

- It ensures that users are able browse within the same site collection to place items in their MediaCart.
- It is REQUIRED to support the ability for MediaCart to save to another destination anywhere inside the Site Collection. Otherwise, the user will be limited to saving files the MediaCart output area only.

Note: The subsite installation can be performed at any time after MediaRich is installed. It is provided for users who wish to customize the behavior of MediaRich on a site-collection basis, rather than on a virtual-server basis.

Basic InstantOn Activation

It is a simple and straightforward process to activate InstantOn™. You begin by navigating to a SharePoint Classic Document Library and changing the library settings. InstantOn can be enabled by Site Collection Administrators or users with the following rights to the document library:

- Owners
- Designers
- Hierarchy Managers
- Contributors

Because the InstantOn feature is available to many types of user roles, the following sections provide a brief walk-through of InstantOn. More in-depth feature information can be found in the *MediaRich ECM for SharePoint User Guide*.

To activate InstantOn and access MediaRich Properties:

1. Navigate to the SharePoint Document Library to be activated.
2. Click the link to the Document library on the left-side navigation.

    You can go to the library directly if you have the URL.

3. Select the **Library** ribbon tab and click **Library Settings**.
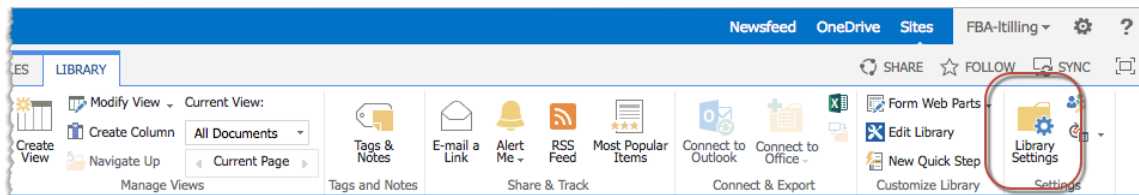

Figure 12: Accessing the Library Settings

4. In the Settings page, click **MediaRich settings**.

   This opens the InstantOn page.

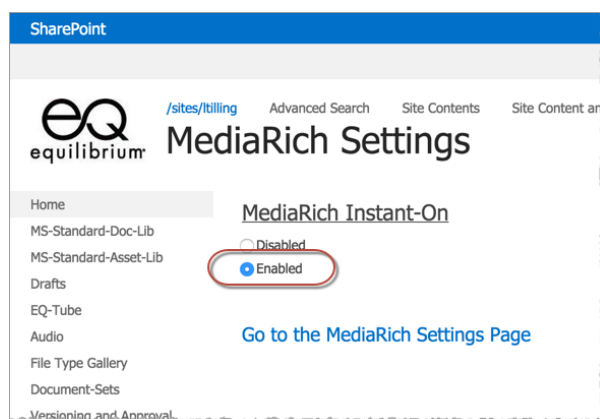5. On this page, select the **Enabled** option.

Figure 13: Enabling MediaRich InstantOn

6. Click the **Go To MediaRich Settings** link.

Working with the MediaRich Properties Editor

MediaRich ECM for SharePoint properties are controlled per application or per site. After some properties are edited (such as those that govern thumbnail dimensions) it might be necessary to restart IIS for the property settings to take effect. If it is undesirable to restart all of IIS, in some cases it could be sufficient to just restart the appropriate application pool.

> **Note:** Restarting the application pool will cause a brief user-facing outage.

There are many settings that affect the MediaRich ECM features:

- MediaGenerator Hostname (the MediaRich Core server name, which can be an IP Address or a Domain Name)
- Thumbnail, Image, and Video Preview Size settings
- Annotation access permissions
- Email settings
- Pyramid file generation

- Metadata extensions

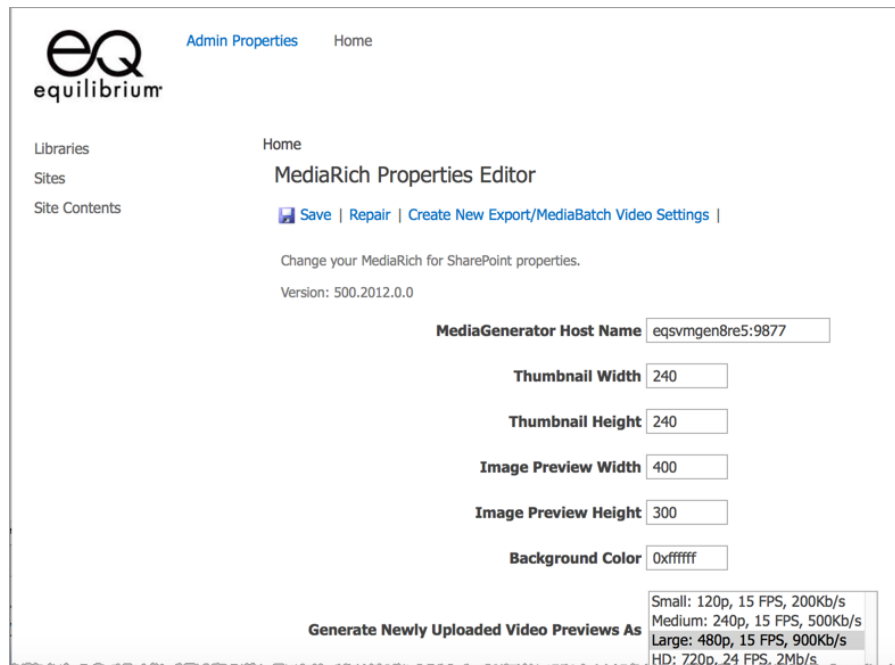When you are done with your changes, click the **Save** icon.

Figure 14: The MediaRich Properties Editor

Image and Video Thumbnails

From the Properties Editor, an administrator has control over the size of image and video thumbnails displayed in a MediaRich Library and the thumbnail size within a MediaRich site.

Video thumbnails are more sophisticated than ordinary thumbnails. The same proxy is used for both the small in-line thumbnails and the large pop-up playback. However, a low-bandwidth proxy is also generated for mobile devices and if a device has a slow connection.

Changing the thumbnail dimensions will cause these assets to be re-generated the next time a user views a page containing video items, except for the large video previews. In order regenerate the large video preview, you must take further action.

Annotation and Redaction Properties

The properties editor provides settings for controlling which users can moderate, create/delete, and view annotations in the UniZoom & Pan window. You can disable access to the Annotation feature at a specific level by clearing the setting, or you can disable all access to annotations by clearing all of these settings.

For more information about the Annotation features in , see UniZoom™ Annotate Anywhere™.

- **Annotation Moderator Groups**: This setting specifies the groups with the "Moderator" level of annotation permissions (the highest level). These users can delete any other user's annotations, as well as create and delete their own annotations. They also have all the Create and View permissions, so it is not necessary to duplicate the group name(s) for the other permission settings.

- **Annotation Create & View Groups**: This setting specifies the groups with the "Creator" level of annotation permissions. These users can create new annotations and can delete their own annotations. They cannot delete another user's annotations. Creators also have the View permission, so it is not necessary to duplicate the group name(s) for the View permission setting.

- **Annotation View-Only Groups**: This setting specifies the groups with the "Viewer" level of annotation permissions. These users can only view annotations and cannot create or delete them.

The annotation feature first checks the user to see if they belong to any groups and looks to see if any of those group names match those that are specified in these settings. If they do not belong to any groups at all, the annotation feature falls back to the user's global site collection effective permissions, which could give the user more access than you want for annotations. If your OneViewer users' access to annotations should be limited, make sure to assign each user to at least one SharePoint group and assign that group accordingly in the annotation settings. And if you do not want a user to have access to annotations, put the user in a group that is not specified in any of these settings.

Note: The permissions set in the SharePoint group do not affect the annotation permissions for that group. This feature only uses the group name to match against the groups where the user belongs. If a user belongs to multiple groups and those groups are assigned to multiple annotation permission levels, it uses the group matched in the highest annotation permission level.

If the Annotation feature must use the effective user's permission, the SharePoint user permissions are mapped as follows: Web managers are mapped to Moderator access, users

with both the add and delete item permissions are mapped to Creator access , and users with add item permission are mapped to "Viewer" access.

If a setting box is cleared of any groups in order to disable it, this also disables the fallback for checking the user's site level effective permissions. Therefore, users that do not belong to any groups are also blocked from using that level of annotations.

Email Properties

The administrator **must** set the SMTP and Site Owner email address fields for the system. This is required for licensing of MediaRich ECM.

SMTP Server: This is the SMTP email server used to send email batch results and notifications, such as corpmail.acme.com.

Site Collection Owner Email: This is the email address for the site owner, such as BobSmith@acme.com. This is the email address used for notifications if the number of users supported by the license is exceeded.

There is a link next to these two required fields to help test the email configuration and ensure that messages are sent correctly. The first time that you click Save for the properties page, this also performs an email test.
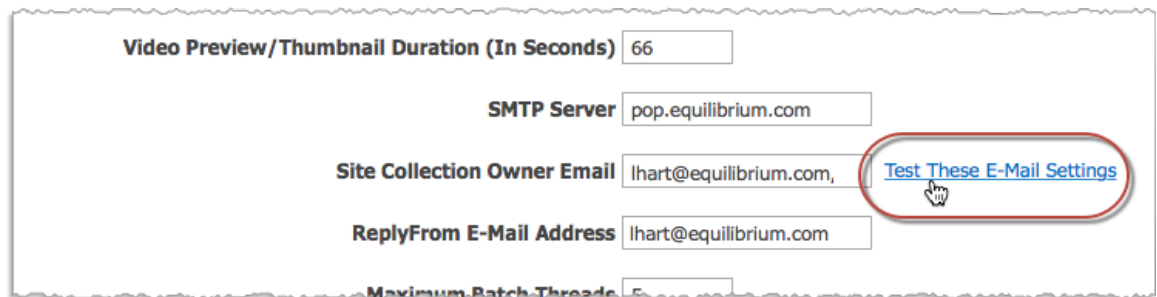
Figure 15: Test the email settings

ReplyFrom E-Mail Address: This is the email address used for sending the email batch results and notifications, such as SPadmin@acme.com.

The *MediaRich for SharePoint Installation and Administration Guide* provides additional information about setting administrative properties.

Adding Users for Properties and MediaCart

Individual users and groups must be added to the MediaRich Administration area to enable them to view and use the visualization capabilities resulting from InstantOn™. Users must also be added to the MediaRich MediaCart workspace to enable access to batch processing of content.

> *Note:* Starting with the 4.3 release, there is no longer any requirement to enable users to have

access to the MediaRich Image Workspace (unless you already have Image Workspaces from prior installations).

To access these permissions in SP 2013/2016:

1. Open the page for which you need to grant access.

2. On the left navigation, click **Sites**.
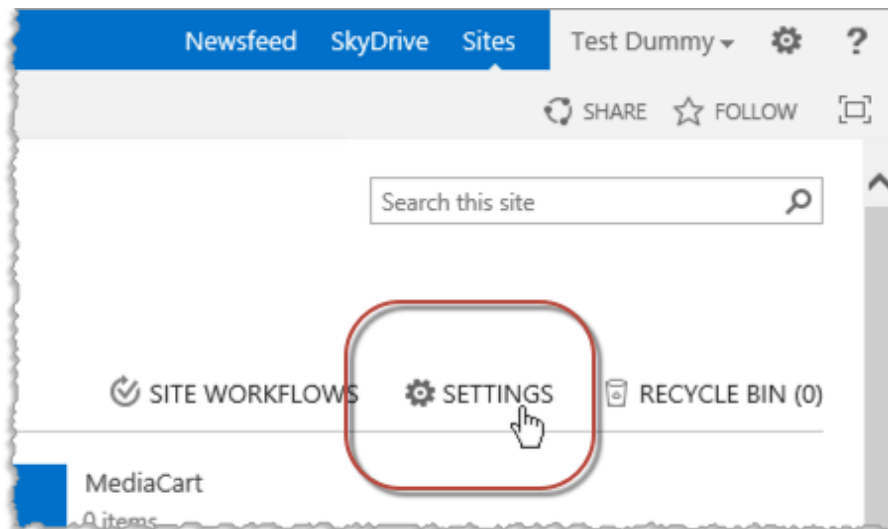
3. In the Sites Content page, click **Settings**.

Figure 16: Accessing the site settings

4. In the Site Settings page, locate the **Users and Permissions** and click the **Site permissions** link.

   Note: You should check to see if you need to stop inheriting the permissions from the parent.

5. Click the **Permissions** tab and select **Grant Permissions**.
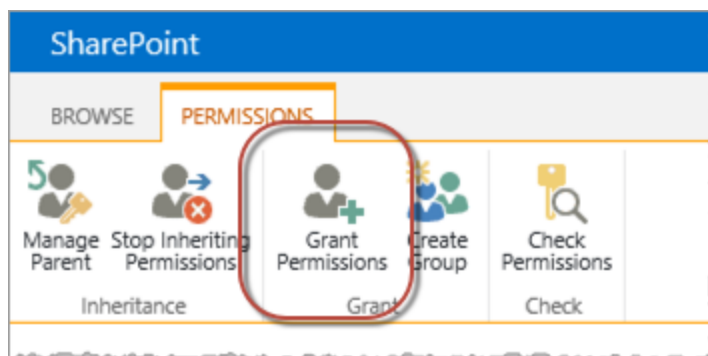
Figure 17: Granting permissions for the site

Administration Workspace

Information workers must have "reader" access to the Administration site in order to read the MediaRich properties required for image processing and other visualization capability access. This site is created by the MediaRich ECM for SharePoint Administration page when the solution is deployed. The location depends on where the MediaRich ECM for SharePoint is deployed, but is usually found at the following URL:
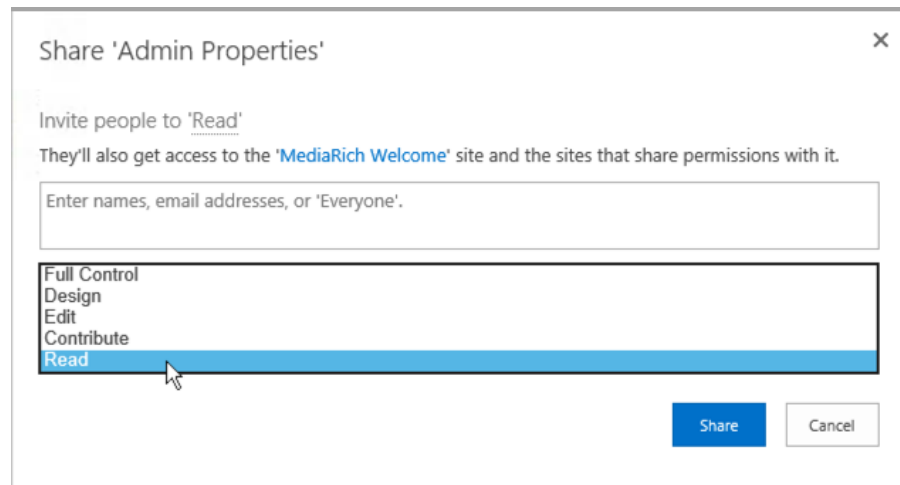
http://<SPserver>/sites/MediaRich/MediaRichAdmin/default.aspx

Figure 18: Granting Read access for the Admin Properties

MediaRich MediaCart Workspace

Information workers must have "read" and "contributor" privileges in order to submit a batch to the MediaCart. This site is created by the MediaRich ECM for SharePoint Administration page when the solution is deployed. The location depends on where the MediaRich ECM for SharePoint is deployed, but is usually found at the following URL:

http://<SPserver>/sites/MediaRich/MediaRichCart/default.aspx

You might want to create a special user group called "MediaCart" to grant these permissions only to those users who should have access to MediaRich batch processes.
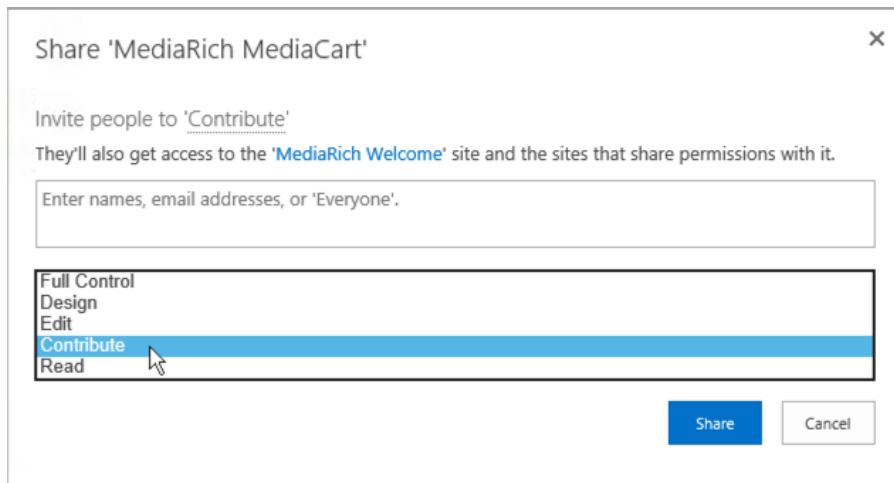
Figure 19: Granting Contribute access for the MediaCart

Permission Configuration

MediaRich ECM for SharePoint uses the implemented SharePoint user and rights management. User groups and roles are supported against configured authentication providers. Within this security model, access rights can be managed down to a single asset level. It is possible to restrict the upload to certain File types, such as avoiding the upload of executable content.

Management of permissions uses an inheritance model, originating from the root site (top site in a site collection) permissions. By default, all child sites will use these permissions (unless the inheritance chain is broken). This is why it is important to carefully design the site permissions from the top down. It is a best practice to use a standard permissions set at the root site and break this inheritance on a limited basis.

Figure 20: Setting default (root) permissions for a user group

Your Activated Libraries

When InstantOn is active, a document library has an array of MediaRich features available to SharePoint users. The following are just a subset of these features.

Enhanced Thumbnail Display

For any library where InstantOn is activated, MediaRich enhanced thumbnails are displayed. When users place the pointer over a MediaRich thumbnail, it displays a contextual tool bar that provides quick access to file export and MediaCart batch processing.
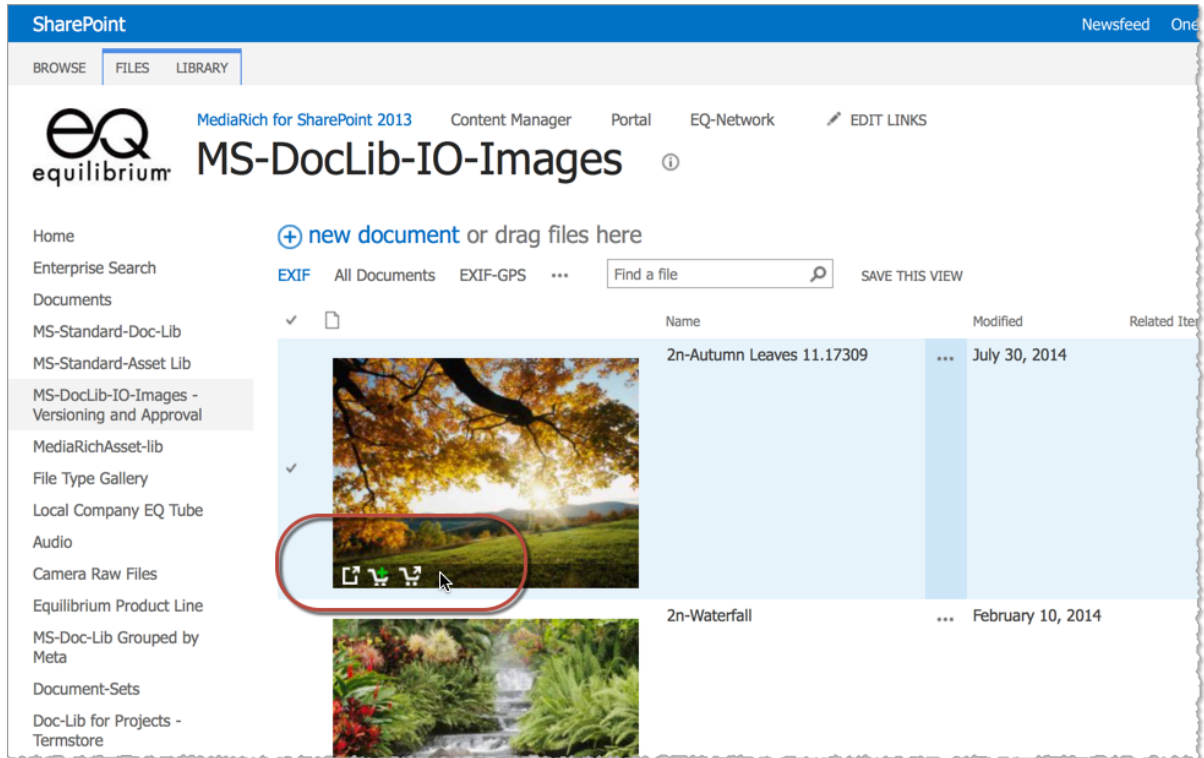

Figure 21: MediaRich enhanced thumbnails

Enhanced SharePoint Ribbon

When you begin working with MediaRich for SharePoint, you will notice some changes to the SharePoint ribbon. There are some additional controls included in the ribbon that you can use to apply operations to an asset (or multiple) assets without having to leave your document library view.
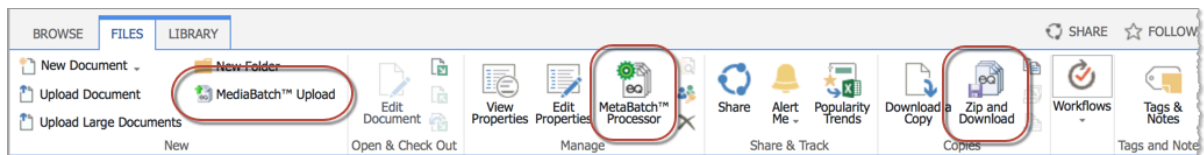

Figure 22: MediaRich for SharePoint ribbon

When you are in a document library and click the **Files** tab, these additional buttons are displayed in the ribbon:

- The **MediaBatch Upload** button – use this to ingest multiple assets and apply metadata on the entire asset set.
- The **MetaBatch Processor** – use this to manage your enterprise-wide content types within SharePoint.
- The **Zip and Download** button – use this to compress and download a single content file, or multiple files.

UniZoom™ View Anywhere™

Equilibrium's next generation, all-file-type UniZoom provides detailed views of images and documents, which has long been a key feature of MediaRich solutions. The patented UniZoom technology dynamically normalizes all content files and provides high quality viewing and thumbnails that are customizable (you can change the rendered size and resolution at any time), creating a consistent reliable viewing experience that is always current without the need for special applications or readers. This means users always get the latest and greatest file while avoiding downloading gigabytes of potentially out-of-date content.

In MediaRich ECM, UniZoom AEC provides enhanced multi-page viewing of both documents and images (such as PDFs and fax files, which are commonly used in Document Imaging) and dynamically updates access to all your PDFs with relative linking.

Note: Many fax files use a .tif or .tiff extension — these are usually the G3 or G4 subsets of the TIF format and they display a multi-page image in the UniZoom window. The G3 or G4 (fax file) TIFF subsets are black-and-white or grayscale only. If you have a multi-page TIFF file with a bit depth greater than grayscale, only the first page is displayed in the UniZoom window and there is no indication that there are other pages in the file.

UniZoom AEC

UniZoom AEC™ (Architecture Engineering and Construction) is new in the MediaRich for SharePoint version 5 release. This technology dynamically updates access to all your PDFs with relative linking, without the need to physically download the files. This makes your libraries containing PDF documents more accessible and usable across all devices. This is quick and painless viewing with read-only capability over as little as a 4G network. It also adds the ability to open 300+ MB PDFs that could not be downloaded or viewed before.
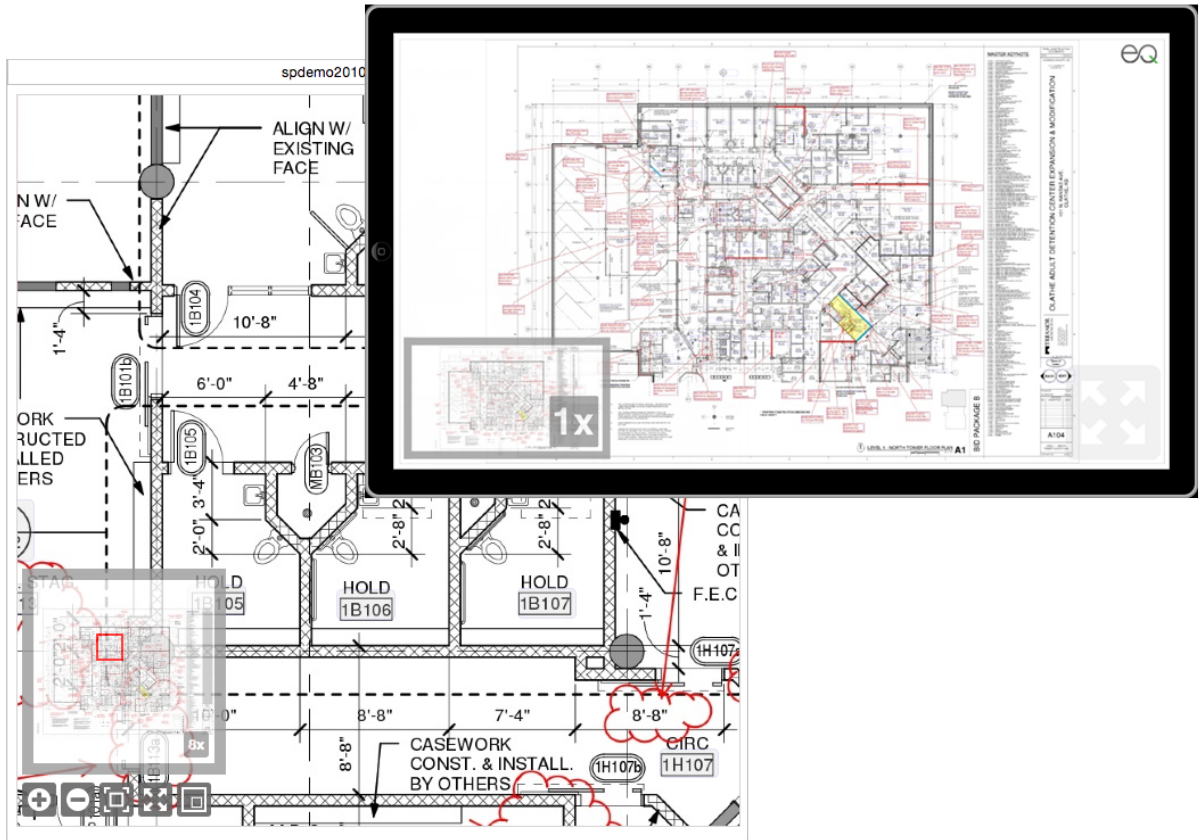

Figure 23: Using the UniZoom AEC technology to view detailed drawings on smart devices

The UniZoom™ Window

To display details for an asset, all you need to do is click the thumbnail in a InstantOn enabled SharePoint library. In the UniZoom viewer, you can drill into the image detail by clicking anywhere in the page or move the view up/down or left/ right without opening an image-editing tool like Photoshop. For documents, the process is the same, but you also have the option to zoom and pan through multiple pages.

UniZoom works for still images and documents. For video files, a single-click of the video (indicated with the standard right triangle) plays the video in-page. Clicking the large video icon opens the video player.

1. Navigate to the Document Library where MediaRich features are enabled.

2. Click the image or document (thumbnail).

   This launches the UniZoom window.

Figure 24: MediaRich UniZoom file viewer

The displayed window contains the following tools:

- The zoom-level Window
- The inset window that shows the entire image and allows for selection of a region of the image.
- The bottom tool bar, including Zoom In (+), Zoom Out (—), and Reset Original
- The Show/Hide Preview Window

Using the UniZoom Tools

After launching the UniZoom window, you can view details within the image or document using the UniZoom tools:

- To zoom in and view details, click the ⊕ icon or the image preview.
  - Each individual click doubles the zoom factor—a double-click on either the image or the icon increases the zoom by a factor of 4.
  - At any time that you are zoomed in, a mover tool is available to allow you to move the zoomed in preview to left or right, or up or down.

- To zoom out of an image, click the ⊖ icon.

- To restore the preview to original zoom-window size, you can click the ⬚ icon.

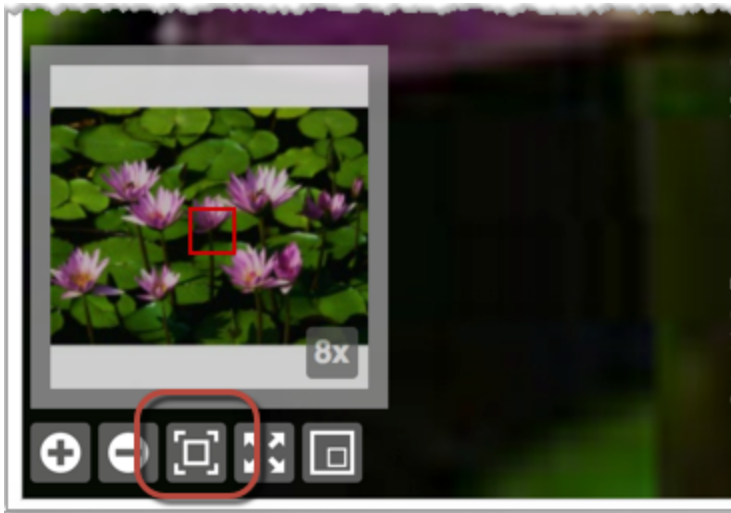

Figure 25: Restore original
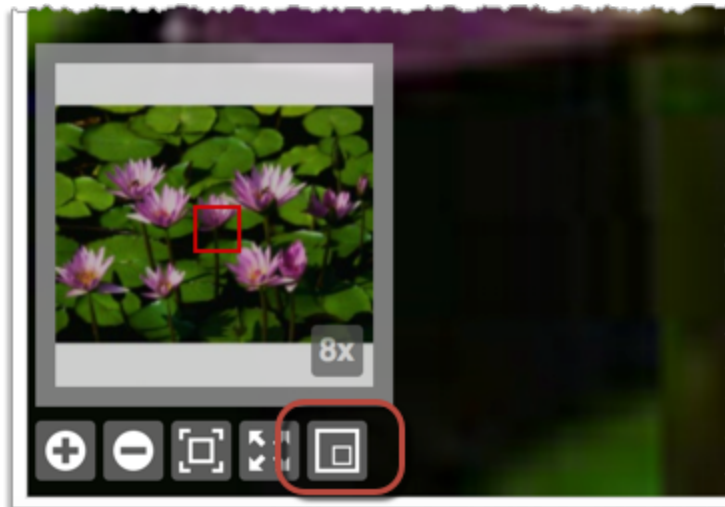
- To show or hide the inset preview, click the ⬚ icon.

Figure 26: Hide Preview

When the preview is displayed, click and drag the navigation box to select the portion of the image or page in the larger window.
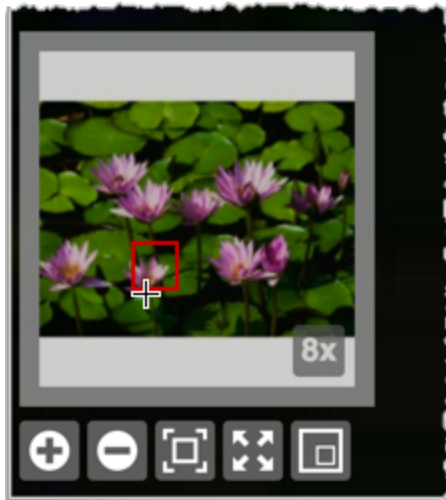
Figure 27: Drag the preview selector

UniZoom features are not limited to images. You can preview the contents of many document formats, including Word, Excel, and PDF without launching their native application. This a huge time-saver for the information worker, enabling quick viewing from just about anywhere, including smart devices.

Note: InDesign files require that the file is saved with a preview image.

UniZoom™ Annotate Anywhere™

Annotate Anywhere provides powerful centralized annotation and redaction for all MediaRich ECM-supported image and office document file types. This feature set is incorporated into the UniZoom & Pan window, which you can open by clicking the document thumbnail in the Document Library. If you have permission to view, create, or moderate annotations and redactions, the window displays a button in the upper-right corner next to the Equilibrium logo.

Figure 28: Annotate mode button

By default, the window is in Zoom & Pan mode. Clicking this button toggles the window to/from annotation mode.

Viewing Annotations

When the window is in annotation mode, it displays a comment sidebar on the right and provides text comments pertaining to any existing annotations and redactions. The displayed comments are sorted by creation date, with the oldest at the top and the newest at the bottom. The user who added the item and the creation time are displayed below the comment.

When there are existing annotation, comment-only, and/or redaction items, the top of the window displays a series of circles with the initials of the contributing users. The initials are based on the display name of the user.
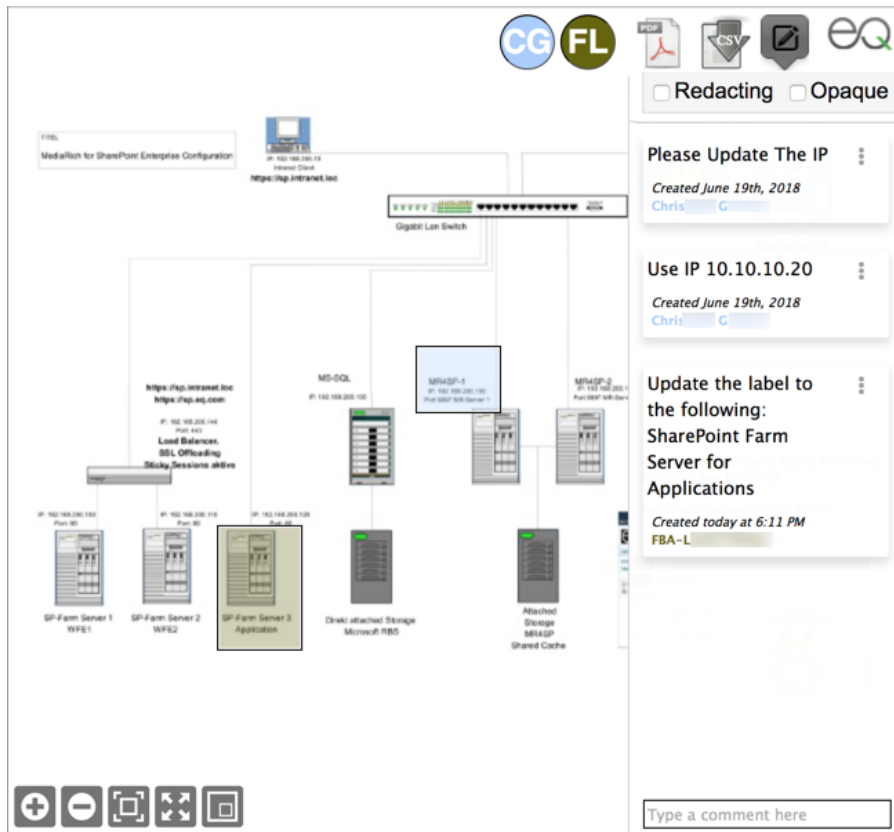
Figure 29: Annotations displayed in the window

> *Note:* If the SharePoint administrator has not set up a user's display name in the site collection or Active Directory service, the annotation/redaction feature will try to make a best-guess for the initials using the user's login name. To make sure that your team members' initials display correctly, have your administrator configure SharePoint user display names/titles as needed.

You can filter the annotation/redaction display for a specific user by clicking their circle, which toggles the display for that user on and off. You can hide the display for multiple users by clicking the needed combination of circles at the top of the window. This filtering resets whenever you close the window or refresh the page in the window.

User Colors

The system assigns a unique color to each user for displaying their annotations/redactions. It uses the color for the circle with the user's initials, the user name in the comment box, and the selection highlight. Color assignments are on a first-come-first-serve, per-page basis. When a color is assigned to a user on a particular page of the document, that user will have the same color for any other annotations or redactions they create on that same page.

If the user or a Moderator deletes all of their annotations and redactions on a page and another user then creates a new annotation or redaction for the first time on that page, the system may assign the now-available color to that user. If the first user later adds new annotations, the system assigns another color to them.

> *Note:* Because the system assigns colors per-page, there is no guarantee that a user will have the same color on a different page of the same document. However, in general, as long as the color is available to the hash for the user's login name, they are likely to get the same color. The same is true of different versions of the same document, as well as different documents. The colors are intended only to distinguish one user's annotations from another on a single page.
>
> If too many unique users create annotations/redactions on a single page of a document, the available color choices could run out. In such cases, the system must assign a color that is also used by another user. And the user will keep that color for every subsequent annotation or redaction they make on that particular page.

Redaction Opacity

Redactions are useful to "block" areas in an image or document. The redaction areas use an opaque display by default, but you can change the current display so that all of the redaction selection areas are displayed with the same transparency as the standard annotation items.

To display redactions using transparency

- Clear the **Opaque** check box at the top of the UniZoom window.

Figure 30: Clear the check box to view redactions using transparency

Transparency Level

The annotation pane is displayed as semi-transparent (98%) by default. If needed, you can modify this display opacity/transparency level in the annotation mode pane. This modified setting is saved in the browser local storage so it that it persists between sessions.

To change the display transparency

1. Place the cursor over the annotation pane as you hold both the Shift key and the mouse button/touchpad.

   This displays the **Pane Opacity** slider.

   > **Note:** This is an extended press of the mouse or trackpad to trigger the display of the slider.

2. Drag the slider control to the left or right to adjust the opacity level to your preference.

Figure 31: Adjust the opacity for the annotation pane

3. Click anywhere in the annotations pane to hide the slider.

   As an alternative, you can also hold the Shift key as you drag the slider control and it will be hidden as soon as you release.

Document Versions

Creating a new version of the document resets the annotations and redactions. However, the annotations and redactions for the previous version are not deleted—if the older version of the document is restored from the Version History of SharePoint, the annotations and redactions from that version are copied to the new version created by the restore feature.

Recycle Bin

Annotations and redactions are deleted when you send the document to the Recycle Bin.

> **Important:** There is currently no way to restore annotations and redactions from a document recovered from the Recycle Bin.

Creating Annotations and Redactions

If you have Creator or Moderator annotation/redaction permissions, you can add an annotation or redaction to a document in the UniZoom & Pan window. You can highlight a selected area within the page and add a comment that pertains to that area. You can also add a simple comment that is not specific to an area or element within the page.

> *Note:* It is currently not possible to update the text or selection box for an existing annotation or redaction. If an annotation/redaction with a selection box requires modification and you are accessing the site from a system with a keyboard and mouse, you can hover the cursor over the box to display a text bubble and carefully copy the text from it. Then you can paste the copied text into a new annotation or redaction and delete the original annotation. You cannot copy text from a comment-only item.

To create an annotation

1. Hover the cursor over the displayed document page and draw a selection box around the area that you want to associate with your comments.

    When the selection box is complete, a text entry box appears.
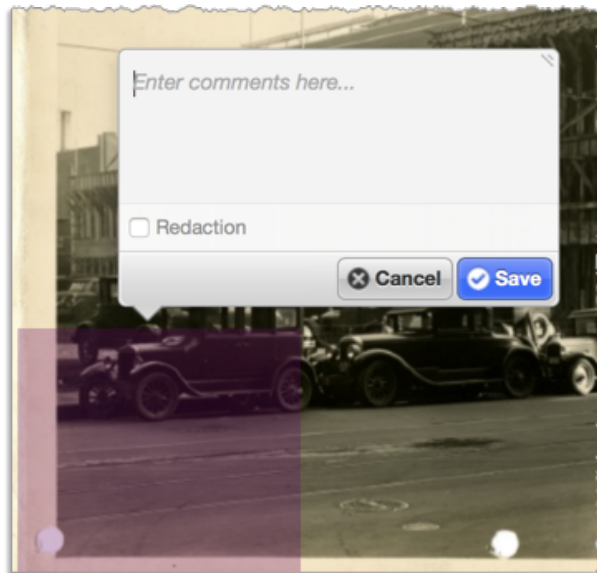
2. Enter the text for your comment.

Figure 32: Enter the comment text for the selected area

3. Click **Save**.

    If you change your mind about the annotation, you can **Cancel** to close the text tool and clear the selection box from the view.

To create a simple comment-only item

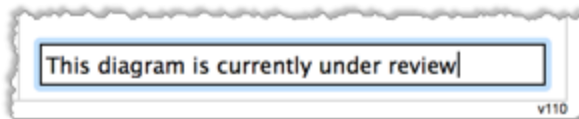1. At the bottom of the comment sidebar, click inside the text box and enter the comment text.

This diagram is currently under review

Figure 33: Enter the comment for the page

2. Press Enter.

    This adds the comment to the bottom of the comments list.

To create a single redaction

1. Hover the cursor over the displayed document page and draw a selection box around the area that you want to associate with your comments.

    When the selection box is complete, a text entry box appears.

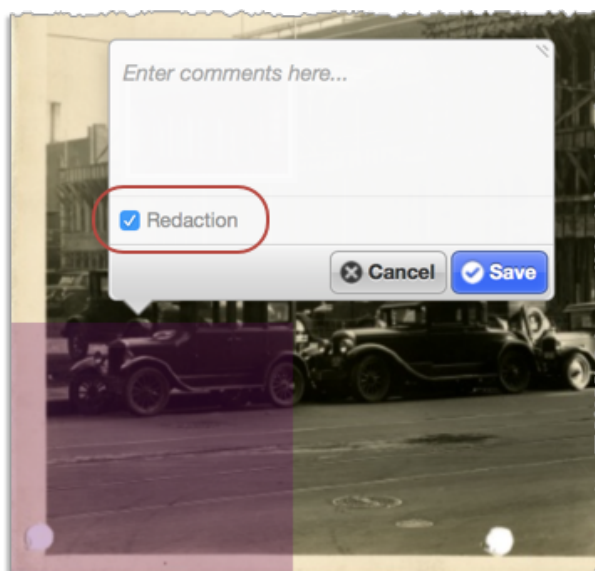2. Select the **Redaction** check box.

Figure 34: Enter the comment text for the selected area

3. *(Optional)* Enter the comment text for the redaction.
4. Click **Save**.

    If you change your mind about the redaction, you can **Cancel** to close the text tool and clear the selection box from the view.

To create multiple redactions

1. Select the **Redacting** check box at the top of the UniZoom window.

    When this option is selected, all new selections in the window are set to redactions by default.

Figure 35: Use the check box to easily add multiple redactions

2. Hover the cursor over the displayed document page and draw a selection box around the area that you want to associate with your comments.

3. *(Optional)* Enter the comment text for the redaction.

4. Click **Save**.

    If you change your mind about the redaction, you can **Cancel** to close the text tool and clear the selection box from the view.

5. Repeat steps 2 through 4 for each additional redaction.

Deleting Annotations and Redactions

To delete an annotation or redaction, you must have the Creator or Moderator permission. With the Creator permission, you can delete only your own annotations/redactions. With the Moderator permission, you can delete anyone's annotations/redactions.

> *Important:* If you delete an annotation or redaction, it cannot by restored.

To delete an annotation or redaction

1. Hover over the highlighted area on the page and click the **X** in the text box.

Figure 36: Delete the annotation/redaction on the page

or

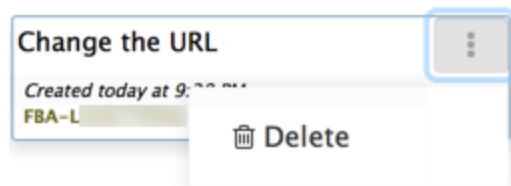In the comment sidebar, click the three dots in the comment box and select **Delete**.

Figure 37: Delete the annotation/redaction in the sidebar

2. Click **OK** in the confirmation dialog.

Exporting Annotations and Redactions

When the UniZoom & Pan window is displayed in annotation mode and there are annotations and/or redactions for the page, the top of the window displays two buttons that you can use to export the annotations and redactions. Users with the Viewer, Creator, or Moderator annotation permissions can access the export functions.

Figure 38: Export buttons

Export PDF

Click the PDF button to export the annotated/redacted document to a multi-page, rasterized PDF. This opens the PDF Export Options dialog. Select or clear the check boxes to specify content for the PDF and click Export.

Include Annotations — Select this option to include annotation areas.

Include Redactions — Select this option to include redaction areas.

Opaque Redactions — Select this option to display the redaction areas as opaque.

Redaction Notes — Select this option to include comment text for the redaction items.
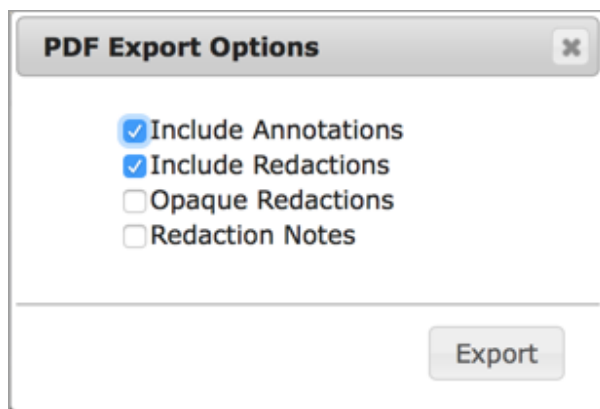

Figure 39: PDF export options

This opens a new browser tab with the document converted to a rasterized PDF with the annotations and/or redactions and any selection highlights burned into each page of the document.

> *Note:* Because this generates a rasterized PDF, there are no individual PDF elements in the page that can be edited and the annotations cannot be extracted. This ensures that the copy will not be mistaken for the original. Also, due to its rasterized nature, the PDF file size could be significantly larger than a normal PDF, especially if the document contains hundreds of pages.

The annotations/redactions are displayed in a similar manner in the PDF as they are in the UniZoom window. However, because they may need to be printed out on a black-and-white printer, the annotations are numbered so it is easy to determine which comment goes with which highlighted area. The user initials circles are not present in this exported version of the document.

Export CSV

Click the CSV button to export the annotations to a CSV file. This generates the CSV file and automatically downloads it through the browser. The CSV file includes these field values for each annotation:

- type
- file name
- page
- user title
- annotation (text)
- created
- user name
- id
- x
- y
- width
- height
- user color
- updated

> *Note:* For comment-only items, the x, y, width, and height values are 0.

In-Line Video Playback

HTML5 mobile device playback is now capable of inline playback like it is on the desktop MediaRich Connector experience. (This still requires separate IIS server setup for devices not capable of SharePoint authentication.) Leveraging this technology with the capabilities of a SharePoint document library, you can create libraries with 400-px-wide thumbnails to create your own "EQ tube".
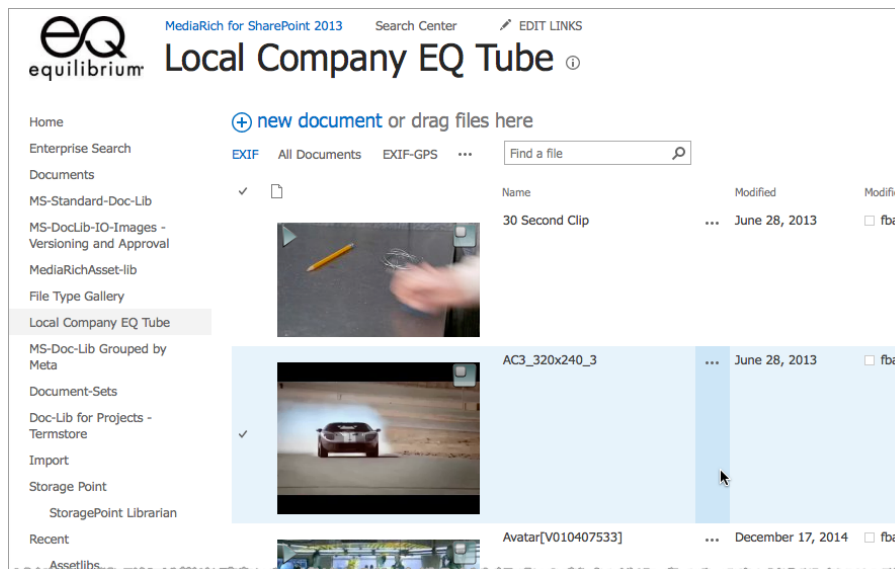

Figure 40: In-line video playback

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