Kofax PDF RMS Protector for SharePoint

Installation Guide

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KOFAX

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Rights Management Services

The more usual way of protecting document content is by limiting access to the networks and computers where the files are stored. But once a user has accessed a document, there are little or no restrictions on reading or modifying the content or forwarding it to other people. Microsoft Information Rights Management (IRM) and its related service (RMS) allow access limitations to remain linked to the document long after it may have left your own direct control.

One of the main uses of an RMS system is to ensure that sensitive documents remain within a company and are accessible only by authorized people within the company. There can be different levels of access (read-only, modify, print, content copy). It is possible to set time limits on the document access rights.

Document purpose

This guide provides assistance for the installation and configuration for the Kofax Rights Management Service (RMS) protector for SharePoint servers. This allows RMS protection to be applied to PDF files. In Power PDF Advanced this is done with the **RMS Security** tool on the right of the **Security** ribbon, introduced in version 1.1.

Target audience

System administrators for network environments using the Microsoft SharePoint repository for file storage and sharing.

System requirements

The RMS Protector was tested with the following configurations.

System requirements for SharePoint 2013 Server

Computer	**Operating system**
SharePoint server	Windows 2012 R2
RMS server	Windows 2012 R2

System requirements for SharePoint 2016 Server

Computer	**Operating system**
SharePoint server	Windows 2016
RMS server	Windows 2016

System requirements for SharePoint 2019 Server

Computer	**Operating system**
SharePoint server	Windows 2016
RMS server	Windows 2016

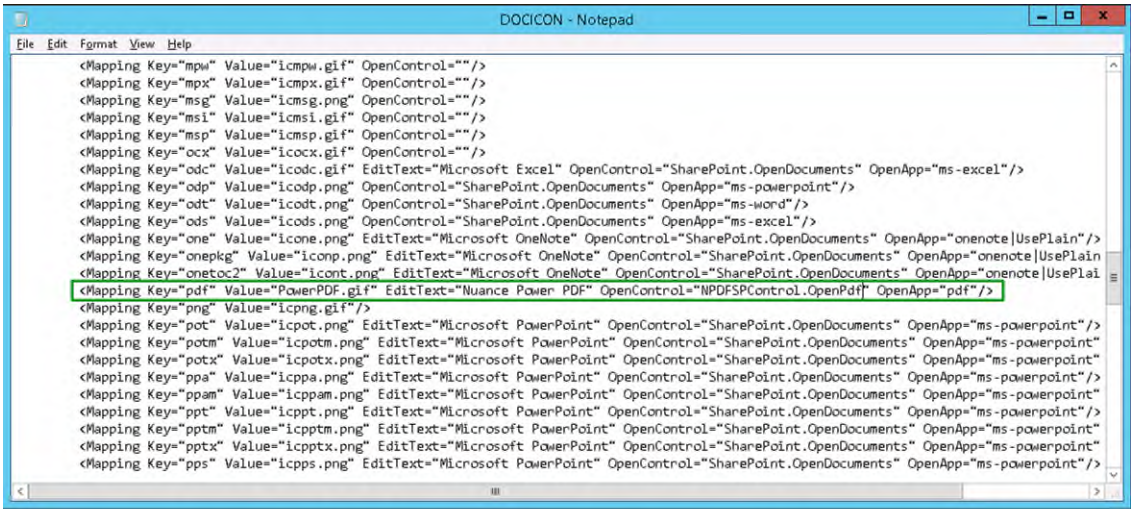
Notes

This guide is written for SharePoint 2013. Differences exist for SharePoint 2016 and 2019; these are detailed below.

Kofax PDF RMS Protector

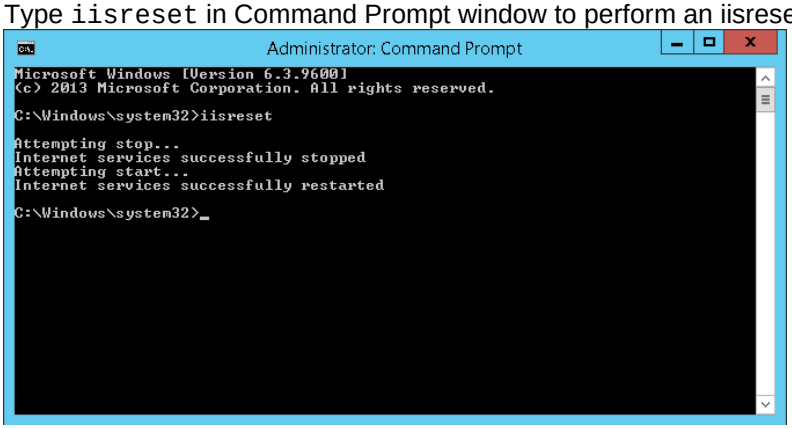
1. Launch a Command Prompt (`cmd.exe`) with Administrator rights (**Run as Administrator**).
2. Launch `KofaxPowerPDFRMSProtector64-5.0.0.exe` to begin the installation process, using the Kofax RMS Protector Installation Wizard. Accept the EULA, other customer ID information and enter a valid serial number: the number supplied with your Kofax Power PDF volume license should be used.
3. Continue installation by accepting or modifying the installation folder (SharePoint can find it anywhere on your system). On the next screen click **Start installation** and at the end click **Finish**.
4. Download the small (17×17 pixels) Kofax PDF icon image from the Kofax delivery media the path given in the introduction and save it as `PowerPDF.gif` (or with the name you prefer).
5. Copy this downloaded icon to the following folder[1]:
   `C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\15\Template\Images`
6. Edit the `DOCICON.XML` file located in the following folder[1]:
   `C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\15\Template\XML\`
7. Under the section <By Extension>, determine whether or not there is a line for the PDF file extension. If so, replace it with the following. If not, add the following line anywhere within the section.
   `<Mapping Key="pdf" Value="PowerPDF.gif" EditText="Kofax Power PDF" OpenControl="NPDFSPControl.OpenPdf.3" OpenApp="pdf"/>`

[1] The example uses drive C, use the drive to which Web Server Extensions is installed on your server. The folder named “15” relates to SharePoint 2013 only. For SharePoint 2016 and 2019 use the name “16”.



The icon file name in this line must be identical to the one used in step three.

8. Type `iisreset` in Command Prompt window to perform an iisreset operation.



Note

SharePoint 2013 and 2016 servers have built-in RMS protector for PDF file type. When launched from a Command prompt that has Administrator rights, Kofax RMS Protector Installer replaces this built-in PDF protector. When uninstalled, it restores the built-in protector.

Please make sure that the built-in protector is indeed replaced. Check all the sub keys of the following key:
`KEY_LOCAL_MACHINE\SOFTWARE\Microsoft\Shared Tools\Web Server Extensions\15.0\IrmProtectors`

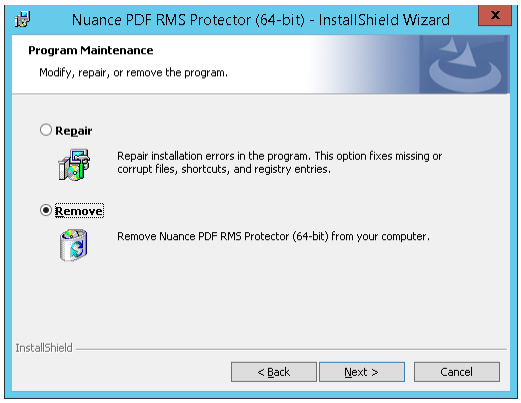
The registry folder named “15.0” relates to SharePoint 2013 only. For SharePoint 2016 and 2019 use the name “16.0”.

No other sub keys can contain `Extensions` value with PDF than `PowerPdfProtector`. If there is any other key with `Extensions="PDF"`, please remove it.

Uninstall Kofax PDF RMS Protector

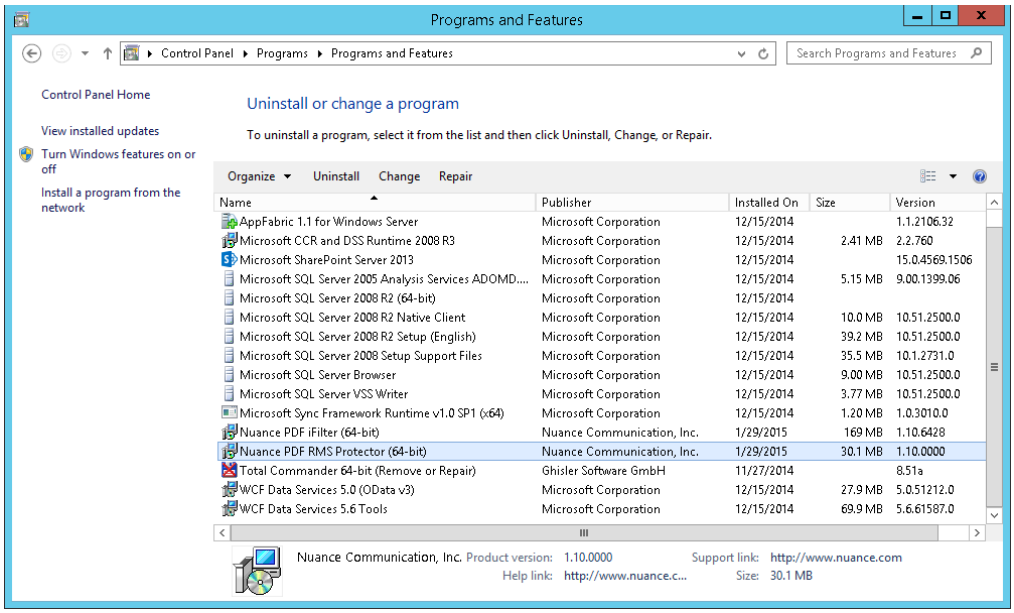
Go to **Control Panel > Programs > Uninstall a program** and select Kofax RMS Protector for SharePoint in the list. Click **Uninstall**.

Kofax RMS Protector can also be uninstalled by launching the installer setup executable file again. In this case you will be asked whether to **Repair** or **Remove** the program. Choose **Remove**.



Check version

To check the version of Kofax RMS Protector installed on the SharePoint server go to **Control Panel > Programs > Uninstall a program,** find Kofax PDF RMS Protector in the list and verify the Program version number.

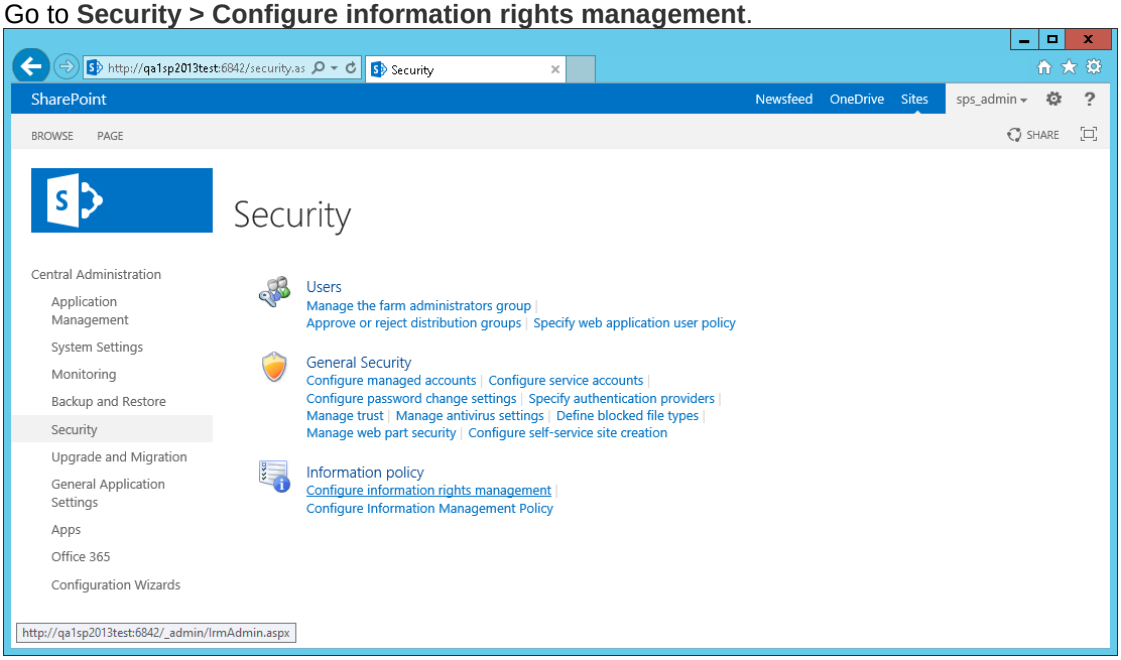


Configure the SharePoint Server

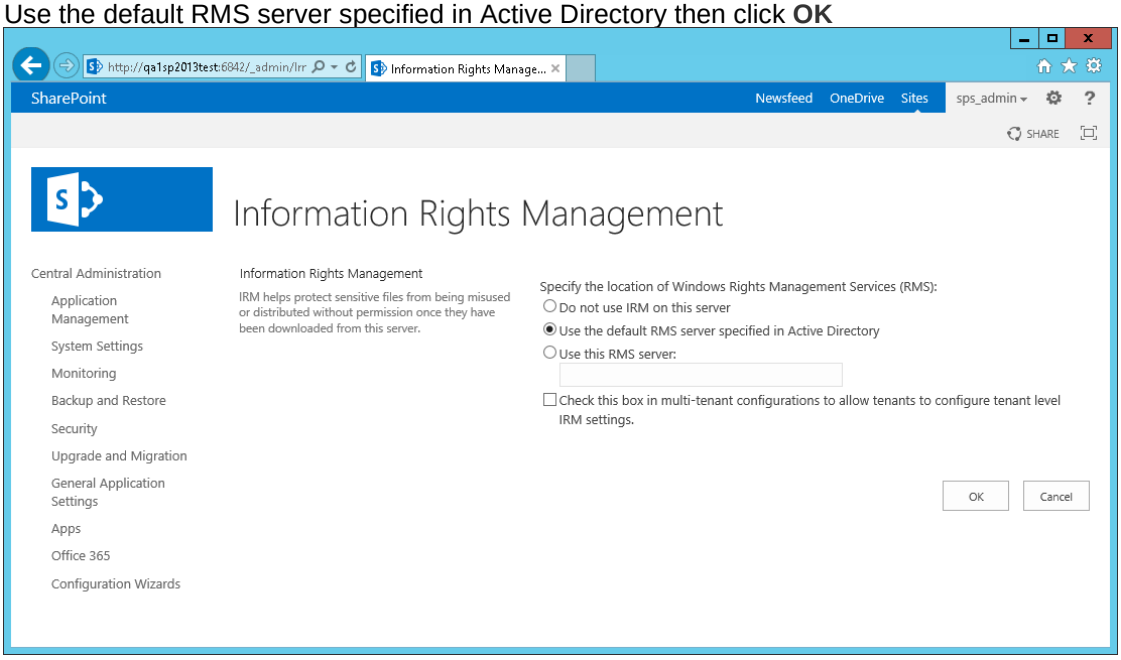
You can skip the following steps if SharePoint is already configured to work with AD RMS.

Set up Information Rights Management (IRM) on SharePoint server

1. Launch SharePoint Central Administration.
2. Go to **Security > Configure information rights management**.



3. Use the default RMS server specified in Active Directory then click **OK**



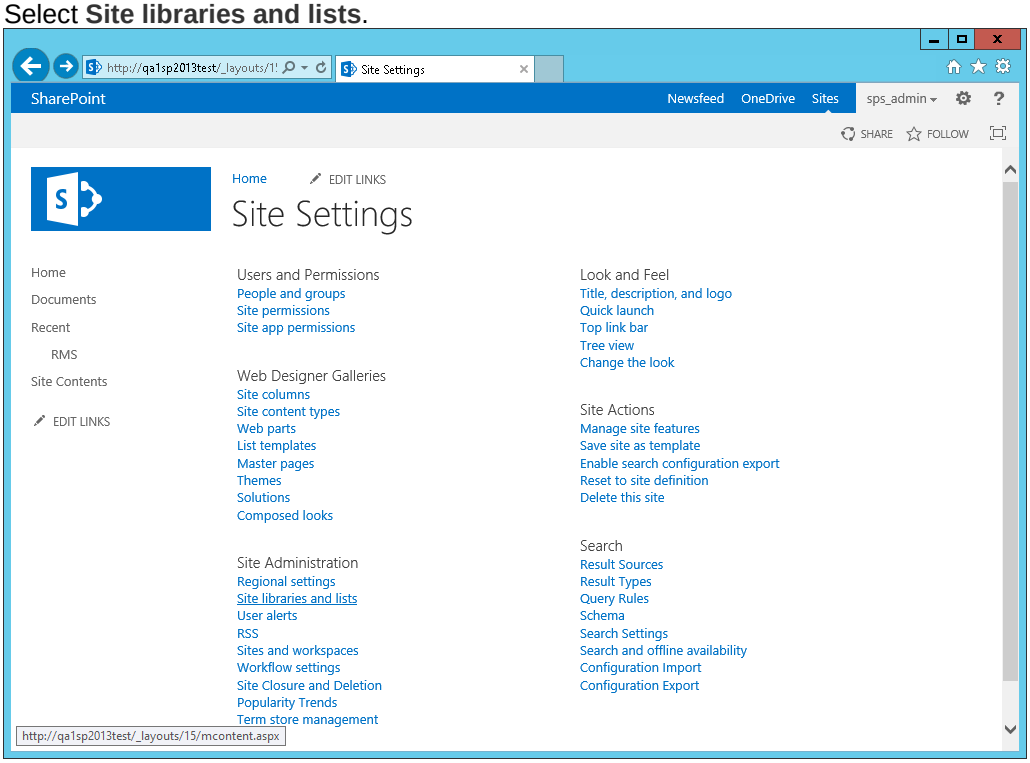
Set up permissions

Permissions are set at library level.

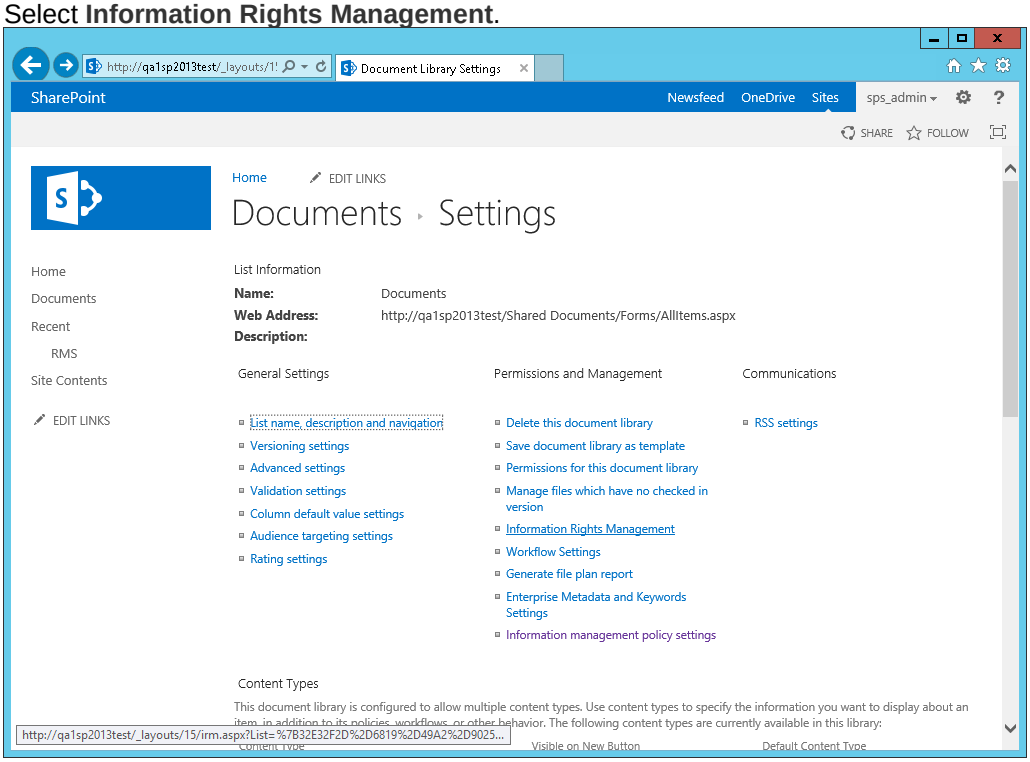
Set up Information Rights Management in a library

1. Log on to the SharePoint Site with Administrator rights where you want to configure the library.
2. Select **Site Settings**.

3. Select **Site libraries and lists**.



4. Select the Library you want to configure.
5. Select **Information Rights Management**.



6. Select the **Restrict permissions on this library on download** check box.
7. Add **Title** and **Description** to the permission policy.
8. To permit users to print downloaded documents, select the **Allow users to print documents** check box.
9. When you have finished configuring the Information Rights Management settings click **OK.**

Set up user permissions in a library

1. Log on to the SharePoint Site with Administrator right where you want to configure the library.

2. Select **Site Settings**.
3. Select **Site libraries and lists**.
4. Select the Library you want to configure.
5. Set up groups and users with the desired **Read**, **Contribute** or **Full Control** settings for the Library.

Verify the RMS configuration of the SharePoint server

1. On the client machine log on to the library where RMS was configured with a user that has access to the library.
2. Download a document from the library and open it in Power PDF.
3. Click on the Lock icon in the tile bar or select **File > Info** and click **Edit Properties**.
4. In the **Document Properties** dialog box verify **Security Method**. It must be set to **RMS Security**.
5. Click on the **Details** button to check user access rights.