

# **PDF inFusion eForms 5.0**

Documentation

Advanced



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# Chapter 1 Introduction

- 1.1 Overview
- 1.2 System Requirements
- 1.3 Installation

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## 1.1 Overview

PDF inFusion eForms Advanced Version includes the *Advanced Stand-Alone* database, eForms *HR Client* database and eForms *Advanced Server* database.

- The *Advanced Stand-Alone* database provides an example of PDF inFusion eForms working as a single database. All elements necessary to run PDF inFusion eForms are contained within this database.
- The *HR Client* database and the eForms *Advanced Server* database work together to show how the eForms server can work in a client/server relationship.

This manual provides information about the software installation and features of PDF inFusion eForms Advanced Version.

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## 1.2 System Requirements

PDF inFusion eForms *Advanced Stand-Alone*, *HR Client*, and *Advanced Server* database require:

1. On the server:
  - Domino 5.0.x server running the HTTP server task
2. On the user's machine:
  - Acrobat, Acrobat Reader 4.05 or above, or Acrobat Approval
  - Internet Explorer 5.0 or above, or Netscape 4.6 or above

For specific hardware requirements, check the Adobe Acrobat requirements.

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## 1.3 Installation

### 1.3.1 *Advanced Stand-Alone* database

1. Copy the eForms *Advanced Stand-Alone* database, eFormsStandAdv.nsf, into the Domino data directory or subfolder in the Domino data directory of the Domino server running the HTTP server task.
2. By default, all design elements are signed by PDF inFusion Development. You can either leave the design elements signed by PDF inFusion

Development, or you can sign them with another ID of your choice. The ID you choose to sign the design elements with must be given access in the server document to run restricted LotusScript/Java agents on the Domino server. If using the CompilePDF functionality, the signer of the agents needs to have access to run unrestricted LotusScript/Java agents.

3. Signing the database with a different ID:
  - a. Switch to the Notes ID with which you would like to sign the database.
  - b. Open Notes Administrator.
  - c. Highlight the correct database.
  - d. Choose Sign Database.

### **1.3.2 eForms *HR Client* and eForms *Advanced Server* databases**

1. Copy the following files into the Domino data directory or subfolder in the Domino data directory of the server running the HTTP Server task:
  - eFormsHRClient.nsf (eForms HR Client)
  - eFormsAdvServer.ntf (eForms Advanced Server)
2. By default, all design elements are signed by PDF inFusion Development. You can either leave the design elements signed by PDF inFusion Development, or you can sign them with another ID of your choice. The ID you choose to sign the design elements with must be given access in the server document to run restricted LotusScript/Java agents on the Domino server. If using the CompilePDF functionality, the signer of the agents needs to have access to run unrestricted LotusScript/Java agents.
3. Signing the database with a different ID:
  - a. Switch to the Notes ID with which you would like to sign the database.
  - b. Open Notes Administrator.
  - c. Highlight the correct database.
  - d. Choose Sign Database.

# Chapter 2 Setup

- 2.1 Overview
- 2.2 Roles and ACL
- 2.3 Configuration Document for Server and Stand-Alone
- 2.4 Configuration Document for Client Database

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## 2.1 Overview

The database administrator must initially configure the eForms *Advanced Stand-Alone* database, the eForms *HR Client* database, and the eForms *Advanced Server* database. This section will explain how to setup the database access and eForms functionality.

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## 2.2 Roles and ACL

### 2.2.1 eForms *HR Client* Database and *Advanced Stand-Alone* Database

1. Roles - There are four predefined roles in the database:
  - ConfigManager: View and modify the configuration document.
  - DocumentManager: View all employee applications in the database.
  - PDFManager: View and modify all PDF form documents.
  - seePrivPDFs: View the PDF in the forms list for an Employee Application when the Access Level option on the PDF form document specifies "Users with See Private PDF Role Only". (See [Section 3.4](#))
2. ACL - The ACL should contain the following minimum entries:
  - Signer of eForms Server Database: Editor or above.
  - eForms users: Author or above.
  - Someone with ConfigManager role: Author or above.
  - Someone with PDFManager role: Author or above.
  - Anonymous: No access.

### 2.2.2 eForms *Advanced Server*

1. Roles - Only the ConfigManager role is needed for the *Advanced Server* database.
  - ConfigManager: View and modify the configuration document.
2. ACL - The ACL should contain the following minimum entries:
  - Signer of eForms Server Database - Editor or above.
  - Someone with ConfigManager role - Author or above.

- Anonymous – no access.

## 2.3 Configuration Document for Server and Stand-Alone

The eForms functionality is set up through the configuration document. The eForms *Advanced Server* and eForms *Advanced Stand-Alone* have the same configuration settings. In order to see the configuration document, the user must have the ConfigManager role in the ACL (See Section 2.2). To get to the configuration document, open the database from the web and click on New Config under DB Config in the left-hand frame. The configuration document will open in the right-hand frame.

### 2.3.1 General Tab

1. Configuration for Notes Server – The configuration document can be set for different servers. When a server is specified, the functionality will check for a configuration document for the server it is running on. If it doesn't find a document for the server, it will look for the default configuration document. To specify the default configuration document, set the value to "\*".
  - a. *Advanced Stand-Alone* database - Different replicas of the database can have their own server document.
  - b. eForms *HR Client* and eForms *Advanced Server* - A default configuration document should be used or make all replicas have the same relative path to the Domino data directory. The eForms *HR Client* database only accepts one path to the eForms *Advanced Server* for all replicas.
2. Agents Run From
  - a. This Database – The functionality will run within this database.
  - b. Other Database – This allows the functionality to be run from another database. Agents will run from the database specified below in the Agent Database Path field.
3. Agent Database Path – If "Other Database" is selected, put the path to the database here. This field is hidden if "Other Database" is not selected. (Example: eForms/logdatabase.nsf)
4. Log Database – Leave blank to log activity and errors to this database, otherwise specify the path to a Lotus Notes database. If specifying a database here, the database must be created and based on the loga4.ntf Lotus Notes Template for eForms logging to function properly.

### 2.3.2 NotesToPDF Tab

This functionality occurs when the [View Selected Form](#) button is clicked in the Employee Packet (See [Section 3.2](#)). The process reads a Lotus Notes document's data, translates it to an PDF compatible format called FDF, and displays the data via a PDF in a browser.

The screenshot shows a configuration window with five tabs: General, NotesToPDF, PDFToNotes, CompilePDF, and Advanced. The NotesToPDF tab is active and contains the following settings:

- Enable NotesToPDF:**  Yes,  No
- Log Errors To:**  Server Console/Log,  Log Database
- Additional Debug Logging:**  None,  Minimal Debug,  Medium Debug,  Maximum Debug

1. Enable NotesToPDF
  - a. Yes - The data stored on a Lotus Notes document will populate a PDF form and be displayed in the right-hand frame when the [View Selected Form](#) button is clicked in the Employee Packet.
  - b. No - The NotesToPDF functionality will not run. A message will be displayed when the [View Selected Form](#) button is clicked in the Employee Packet.
2. Log Errors To
  - a. Server Console/Log - Will log to the Domino server console, where the database resides.
  - b. Log Database - Will log errors to the database that is set in the [Log Database](#) field on the General Tab.
3. Additional Debug Logging - eForms will log errors and activity based on the level chosen:
  - a. None - No logging will occur.
  - b. Minimal - Logs the start and finish of the process plus any critical errors during the process.
  - c. Medium - All minimal logging plus all major steps in the process.
  - d. Maximum - All minimal and medium logging plus details included in each of the major steps to include specifics about the data.

### 2.3.3 PDFToNotes Tab

This functionality occurs when the [Submit](#) button is clicked on a PDF launched via the [View Selected Form](#) button in the Employee Packet (See [Section 3.2](#)). The process reads the PDF compatible format called FDF from the PDF and translates it to a Lotus Notes document to be stored.

<a href="#">General</a>	<a href="#">NotesToPDF</a>	<a href="#">PDFToNotes</a>	<a href="#">CompilePDF</a>	<a href="#">Advanced</a>
<p>Enable PDFToNotes:            <input checked="" type="radio"/> Yes  <input type="radio"/> No</p> <hr/> <p>Log Errors To:                    <input type="checkbox"/> Server Console/Log  <input checked="" type="checkbox"/> Log Database</p> <hr/> <p>Additional Debug Logging:      <input checked="" type="radio"/> None  <input type="radio"/> Minimal Debug  <input type="radio"/> Medium Debug  <input type="radio"/> Maximum Debug</p> <hr/> <p>Save the submitted data to:    <input checked="" type="radio"/> Original Notes Document  <input type="radio"/> New Document  <input type="radio"/> Nowhere (Use Stub Functions)</p> <hr/> <p>After PDF Form Submit:        <input checked="" type="radio"/> Use the browser_redirect Field on the PDF  <input type="radio"/> Go to Value in Return URL  <input type="radio"/> Use ITMX_RETURN Field on the PDF  <input type="radio"/> Do Nothing (Use Stub Functions)</p> <hr/> <p>Return URL:                      <input type="text"/></p>				

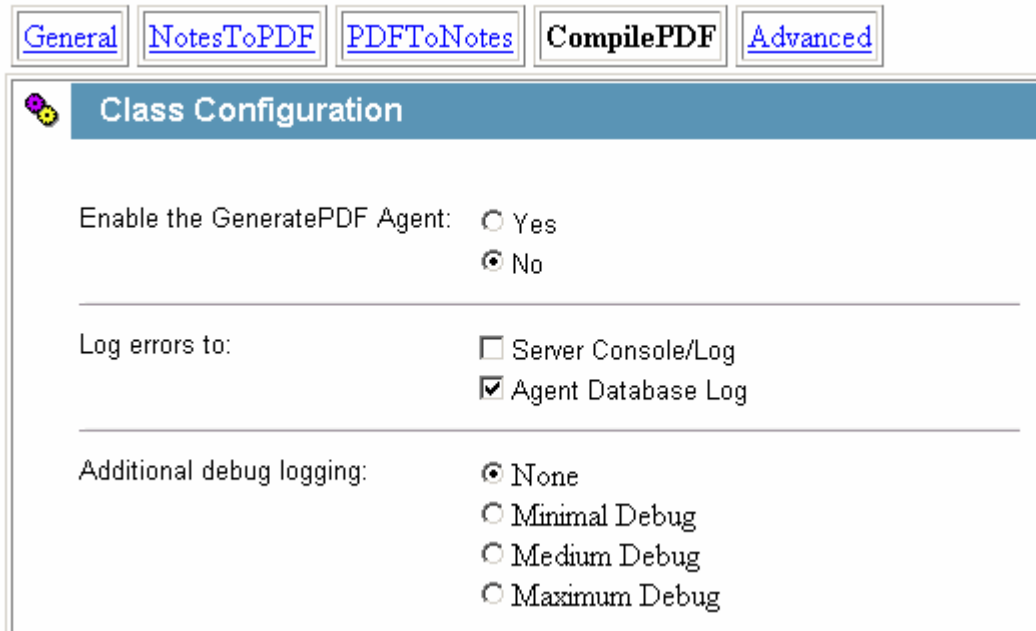
1. Enable PDFToNotes
  - a. Yes - The data displayed via a PDF form will be sent to a Lotus Notes document stored in the database.
  - b. No - A message will be displayed when the Submit button is clicked on the PDF.
2. Log Errors To
  - a. Server Console/Log - Will log to the Domino server console where the database resides.
  - b. Log Database - Will log errors to the database that is set in the Log Database field on the General Tab.
3. Additional Debug Logging - eForms will log errors and activity based on the level chosen:
  - a. None - No logging will occur.
  - b. Minimal - Logs the start and finish of the process plus any critical errors during the process.
  - c. Medium - All minimal logging plus all major steps in the process.
  - d. Maximum - All minimal and medium logging plus details included in each of the major steps to include specifics about the data.
4. Save the submitted data to

- a. Original Notes Document – Any additions or modifications made on the PDF form will be sent to the Lotus Notes document containing the original data.
  - b. New Document – A new document will be created with the data on the PDF Form. The original document will remain the same.
  - c. Nowhere (Use Stub Functions) – eForms will not perform any action with the submitted data. See the eForms Technical documentation for an explanation of how to use stub functions.
5. After PDF Form Submit
- a. Use the browser\_redirect field on the PDF – The PDF can have a field called browser\_redirect. After the data is submitted the browser will redirect to the URL specified in this field.
  - b. Go to Return URL – Will return you to the URL specified in the Return URL field.
  - c. Use ITMX\_RETURN field on document – The PDF can contain a field called ITMX\_RETURN which should include HTML to be displayed after the form is submitted.
  - d. Do Nothing (Use Stub Functions) – eForms functionality will do nothing after the data is submitted. See the eForms Technical documentation for an explanation of how to use stub functions.
6. Return URL – If the “Go to Return URL” option above is selected, once the data is submitted the browser will redirect to this URL.

### 2.3.4 CompilePDF Tab

CompilePDF runs when the Create Filled PDF button is pressed (See Section 3.3). The process provides the Domino server the capability of generating final PDF documents flattened or filled with data from the Lotus Notes document, and the ability to combine multiple PDF documents into one PDF.

#### Class Configuration



The screenshot shows the 'Class Configuration' dialog box with the 'CompilePDF' tab selected. The dialog contains the following settings:

- Enable the GeneratePDF Agent:**  Yes,  No
- Log errors to:**  Server Console/Log,  Agent Database Log
- Additional debug logging:**  None,  Minimal Debug,  Medium Debug,  Maximum Debug

1. Enable the GeneratePDF Agent

- a. Yes - A PDF will be flattened or filled with the data stored in the Lotus Notes document.
  - b. No - A message will be displayed when the Create Filled PDF button is clicked on the PDF.
2. Log Errors To
- a. Server Console/Log - Will log to the Domino server console where the database resides.
  - b. Log Database - Will log errors to the database that is set in the Log Database field on the General Tab.
3. Additional Debug Logging - eForms will log errors and activity based on the level chosen:
- a. None - No logging will occur.
  - b. Minimal - Logs the start and finish of the process plus any critical errors during the process.
  - c. Medium - All minimal logging plus all major steps in the process.
  - d. Maximum - All minimal and medium logging plus details included in each of the major steps to include specifics about the data.

**Advanced Settings**

**Advanced Settings**

CompilePDF Logging:  Yes  
 No

---

CompilePDF Log Directory:

---

CompilePDF Log File Name:   
(created in the CompilePDF Directory)

---

Flatten Final PDF:  Yes  
 No  
(replaces text fields with field value as text)

---

Execution Timeout: +/-  seconds

1. CompilePDF Logging
  - a. Yes - The CompilePDF functionality will place a log file in the directory specified in CompilePDF Log Directory.
  - b. No - No log file will be created.
2. CompilePDF Log Directory - (Optional) If CompilePDF Logging is set to "Yes", the CompilePDF process creates a log file each time it is run. This log file will be placed in the specified directory.
3. Compile PDF Log File Name - (Optional) The name of the CompilePDF log file.

4. Flatten Final PDF
  - a. Yes - The fields on the PDF will be "flattened". Flattening removes the fields from the PDF, leaving only the values in the fields on the PDF as text.
  - b. No - The fields will remain on PDF with values filled in on the form.
5. Execution Timeout – Set in seconds. After set period, without successful execution, CompilePDF will terminate.

### Path Configuration

Path Configuration

Final PDF Directory:   
(i.e. "c:\eForms\complete\")

---

Forms Template Directory:   
(i.e. "c:\eForms\templates")

---

Temporary File Directory:   
(i.e. "c:\eForms\temp\")

---

The Executable Directory:

---

[Check For Directories](#)

---

Note: Please use complete paths for all directories, i.e. "c:\eForms\temp\".

1. Final PDF Directory – When the Create Filled PDF button is pressed a PDF is created and it will be saved in the directory in this field.
2. Forms Template Directory – CompilePDF uses PDF templates to create the new PDFs. The templates will be stored in this directory ([See Section 3.4](#)).
3. Temporary File Directory – During the CompilePDF process, files are created on a temporary basis and placed in this folder. The files in this folder get deleted after use.
4. The Executable Directory – CompilePDF uses executables stored in this directory.
5. Check for Directories – Displays list of specified directories. IF the directories do not exist, the option ot create them exists. If The Executable Directory exists and the executable is not found, there will be an option to install the executable.

### 2.3.5 Advanced Tab

<a href="#">General</a>	<a href="#">NotesToPDF</a>	<a href="#">PDFToNotes</a>	<a href="#">CompilePDF</a>	<b>Advanced</b>
Operating System Of Server:		<input checked="" type="radio"/> Windows NT or 2000 <input type="radio"/> AIX <input type="radio"/> OS/400 <input type="radio"/> Solaris <input type="radio"/> Linux <input type="radio"/> Other		
Enable SDK Functions:		<input checked="" type="radio"/> Yes <input type="radio"/> No		
Administrative ID (OS/400 only)		<input type="text" value="QNOTES"/>		
Auto-generate ITMX_SERVER		<input checked="" type="radio"/> Yes <input type="radio"/> No		
Auto-generate ITMX_AGENTDATABASE		<input checked="" type="radio"/> Yes <input type="radio"/> No		
<a href="#">Test for Agent Database Validity</a>				

1. Operating System of Server – The operating system of the server the agents are running on.
2. Enable SDK Functions – Stub functions are provided to allow the database administrator to customize some of the eForms functionality. For a detailed description of how to use Stub functions, refer to the eForms Technical documentation.
  - a. Yes – All stub functions in the database will run.
  - b. No – All stub functions in the database will not run.
3. Administrative ID (OS/400 Only) - The OS/400 administrative ID under which local commands are to run.
4. Auto-generate ITMX\_SERVER
  - a. Yes - The ITMX\_SERVER field on the Lotus Notes document and PDF file will be set when the View Selected PDF button is clicked and filled in with the value of the server the functionality is running on, overriding the values on the document.
  - b. No – ITMX\_SERVER field needs to be filled out manually.
5. Auto-generate ITMX\_AGENTDATABASE
  - a. Yes - The ITMX\_AGENTDATABASE field on the Lotus Notes document and PDF file will be set when the View Selected PDF button is clicked and filled in with the value of the database the functionality is running on, overriding the values on the document.
  - b. No – ITMX\_AGENTDATABASE field needs to be filled out manually.

6. Test for Agent Database Validity - Performs a check to see if the server can locate the functionality it uses for operation.

---

## 2.4 Configuration Document for Client Database

The configuration document for the client database allows you to specify which server the functionality should run from. In order to see the configuration document the user must have the ConfigManager role in the ACL ([See Section 2.2](#)). To get to the document, open the database from the web and click on DB Config in the left-hand frame. The configuration document will open in the right-hand frame.

1. Server Agent Database Name – Name of the eForms *Advanced Server* database where the functionality is being run.

# Chapter 3 Using eForms

- 3.1 Overview
- 3.2 Working with an Employee Packet
- 3.3 Manager View
- 3.4 Managing PDF forms

---

## 3.1 Overview

Once the databases are configured users can now use the eForms *HR Client* database or the eForms *Advanced Stand-Alone* database. When using the Client/Server implementation users only need to use the eForms *HR Client* database.

This section explains the views, forms, and functionality used to demonstrate PDF inFusion eForms.

---

## 3.2 Working with an Employee Packet

### 3.2.1 New Application

The New Application form stores data in a Lotus Notes database using a Lotus Notes form.

1. Click on New Application in the left-hand frame. This will bring up the new application form in the right-hand frame.
2. Form data for the user logged in can be retrieved from the Names and Address Book on the Domino server by clicking on Fill in Form with My Data.
3. Type in information in the fields.
4. When finished entering data, click on Create New Employee Packet. This will save the data in the Lotus Notes database.
5. The frame will change to the Employee Packet for the new person.

### 3.2.2 Employee Packet

When an Employee Packet is opened, it is reading the information from the Lotus Notes document created by the New Application form. This information will be displayed in PDF forms, when the View Selected Form button is pressed.



## Employee Packet For PDF i Development

Select A Form To View:

[View Selected Form](#)

[Switch To Manager's View](#)

[Home](#)

eForms

1. All Employees page
  - a. Click on All Employees in the left-hand frame.
  - b. Click on a user's name. This will bring up the Employee Packet.
  - c. All the forms the user has access to view will be seen in the drop-down list. Select a PDF form from the drop-down list.
  - d. Click on View Selected Form to view the user's data in the PDF form. This works based on the settings on the NotesToPDF tab in the Configuration Document ([See Section 2.3.2](#)).
  - e. The populated PDF form will come up in the right-hand frame.
2. Quick Launch
  - a. Click on Quick Launch in the left-hand frame.
  - b. All the forms the user has access to view will be seen in the drop-down list. Select a PDF form from the drop-down list.
  - c. Click on the name of the person, whose data you wish to see in the PDF form.
  - d. The populated PDF form will come up in the right-hand frame.

### 3.2.3 Submitting data from a PDF to the Lotus Notes database

1. When the PDF form opens, enter or change data in any of the fields.
2. When finished, click on the Submit button.
3. eForms will create a new Lotus Notes document or replace the fields on the current Lotus Notes document, depending on the settings on the PDFToNotes tab in the Configuration Document ([See Section 2.3.3](#)).

---

### 3.3 Manager View

1. Click on Manager View in the left-hand frame. The view will open in the right-hand frame.
2. Click on a person's name.
3. The employee packet will come up in a manager view.
4. You can switch from the current employee packet to another user by selecting a person from the drop-down list.
5. Select a form from the drop-down list.
6. Click on View Selected Form to view the user's data in the PDF form. This works based on the settings on the NotesToPDF tab in the Configuration Document ([See Section 2.3.2](#)).

7. Click on [Create Filled PDF](#) to create a new PDF either with the fields filled in or "flattened" on the PDF. The settings for this functionality are in the CompilePDF tab on the Configuration document ([See Section 2.3.4](#)).
8. Click on [Add New PDF](#) to add a PDF Form ([See Section 3.4](#)).
9. Click on [Generate Raw XML](#) to see the XML stream of the Lotus Notes document.

---

## 3.4 Managing PDF Forms

### 3.4.1 Adding the Form

1. Click on [Add PDF](#) in the left-hand frame under PDF.
2. The Attachment Properties & Settings page will be displayed in the right-hand frame.
3. [PDF Attachment File](#) - Attach a PDF by typing in the full path or clicking on the browse button.
4. [File URL](#) - Instead of attaching a file you can specify a URL to a PDF here.
5. [Description](#) - Enter a description for the attached PDF. This is how the PDF name will display in the drop-down menu of the Employee Packet.
6. [Type](#) - When attaching a PDF you should specify "Form" and/or "Template". When there is JavaScript on a PDF form and the form is "flattened", the JavaScript can cause an error when the PDF is opened. The benefit of separating the "Form" functionality from the "Template" functionality is you can provide JavaScript for users when entering data via the web, but still have a PDF form without JavaScript to be used for "flattening" and filling.
  - a. Form - When the [View Selected Form](#) button is pressed it will use this PDF to display the form
  - b. Template - A template is the PDF form detached to the directory specified on the Configuration Document. It is needed for the CompilePDF functionality. To detach the templates, after the document is saved click on [Detach Templates](#) in the left-hand frame.
7. [Access Level](#) - Specify an access level for the PDF
  - a. Public - All users with reader access in the database can view this PDF.
  - b. Users with See Private PDF Role Only - Only the users with this role in the database ACL can view this PDF.
  - c. Specified People Only - Only the people entered in the field below, [Others with Access](#), will be able to see this PDF.
8. [Others with Access](#) - Enter all users' names in this field if "Specified People Only" is selected in the [Access Level](#) selection .
9. Click [Save Document](#) to save the document in the Lotus Notes database.
10. Click [Close Document](#) to close the document and return to home page. If you did not click on [Save Document](#) before closing the document your changes will not be saved.

### 3.4.2 Detaching the Templates

1. Click on [Detach Templates](#) in the left-hand frame under "PDF". This will detach all PDF Form documents with the "Template" type checked to the directory specified on CompilePDF tab in Configuration Document ([See Section 2.3.4](#)).

### **3.4.3 Viewing PDF Form documents**

#### **Forms**

1. Click on Forms in the left-hand frame under "PDF".
2. A list of all PDF Form documents that have the "Form" type checked will be displayed in the right-hand frame.
3. To view a PDF Form document click on the file name. This will bring up the document in the right-hand frame.

#### **Templates**

1. Click on Templates in the left-hand frame under "PDF".
2. A list of all PDF Form documents that have the "Template" type checked will be displayed in the right-hand frame.
3. To view a PDF Form document click on the file name. This will bring up the document in the right-hand frame.

# Chapter 4 PDF inFusion Support

## 4.1 Support

### 4.1 Support

While this documentation provides the information you need to understand and use PDF inFusion eForms, there may be times when additional information or assistance is needed.

- If you purchased PDF inFusion from a PDF inFusion Business Partner, please contact the business partner for technical support. Your administrator will have all the contact information that you need.
- Otherwise, send your questions directly to ITM Products via email to: [pdfisupport@itmproducts.com](mailto:pdfisupport@itmproducts.com).

ITM will provide timely responses to support questions from PDF inFusion users that have purchased a PDF inFusion Maintenance Agreement.

For the latest information on PDF inFusion products and services, please visit [www.itmproducts.com](http://www.itmproducts.com).

# Glossary

- ❖ **CompilePDF**  
The functionality which takes data displayed on a PDF form, creates a new PDF file and fills in the fields with the data or removes the fields and transfers the data to the PDF.
- ❖ **ConfigManager role**  
ACL role needed to manage the Configuration Document in the eForms databases.
- ❖ **Configuration document**  
A Lotus Notes document containing all settings for the eForms functionality.
- ❖ **Employee Application**  
A Lotus Notes form used to enter data in the eForms databases.
- ❖ **Employee Packet**  
The Lotus Notes form used to launch the eForms functionality, displaying the data in the PDF form.
- ❖ **Flatten**  
Removing PDF form fields from the PDF, and transposing the data in the fields on the PDF.
- ❖ **Forms Creator Tool**  
An Adobe Acrobat plug-in which provides the ability to create Lotus Notes forms from a PDF form.
- ❖ **NotesToPDF**  
This functionality occurs when data is read from a Lotus Notes document and displayed via a PDF.
- ❖ **PDF**  
From <http://www.Adobe.com>: "Adobe Portable Document Format (PDF) is the open de facto standard for electronic document distribution worldwide. Adobe PDF is a universal file format that preserves all the fonts, formatting, graphics, and color of any source document, regardless of the application and platform used to create it." For more information on Adobe PDF, please visit <http://www.adobe.com/acrofamily/main.html>.
- ❖ **PDFToNotes**  
This functionality occurs when data displayed via a PDF form is sent to a Lotus Notes document to be stored.
- ❖ **PDF Form Document**  
Stores the PDF files or locations to the PDF file used in the eForms databases. Security for the PDF files is also set on this document.

❖ **PDFManager role**

Access Control List role needed to create and view PDF Form documents.