

# PDF inFusion eForms 5.0

Documentation

Enterprise



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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 Enterprise Version includes the eForms *HR Client* database and the eForms *Enterprise Server* database. The *HR Client* database and the *Enterprise 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 Enterprise Version.

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## 1.2 System Requirements

PDF inFusion eForms *HR Client*, and eForms *Enterprise 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 Enterprise Server

1. Copy the eForms *Enterprise Server*, eFormsEntServer.ntf, 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.
4. Copy the jar file *eFormsServlet.jar* to the servlet directory of the Domino server, usually `domino/servlet` under the data directory of the server.
5. Add the following lines to the *servlets.properties* file, found in the base level data directory of the Domino server. If the server does not have any servlets running this file may not exist yet. The file will have to be created from a blank text file and placed in the base level data directory for the Domino server.
  - `Servlet.eForms.code=com.itmassociates.eForms.servlets.EformsServlet`
  - `Servlet.eForms.initArgs=configLocation=db,configDB=<<path to config db relative to data directory>>,configName=<<config alias from config doc>>`<<path to config db relative to data directory>> is the path to the eForms *Enterprise Server*.  
<<config alias from config doc>> is set on General Tab of the Configuration Document. (See Section 2.3.1)
6. Open the server document in the Names and Address Book for the Domino server hosting the servlet. Then:
  - a. Open the Internet Protocols tab.
  - b. Open the Domino Web Engine tab.
  - c. Under Java Servlets, set Java Servlet Support to "Domino Servlet Manager".
  - d. Under Servlet URL Path enter `"/servlet"`.
  - e. Under Class Path enter `"domino\servlet; domino\servlet\eFormsServlet.jar"`.

### 1.3.2 HR Client

1. Copy the eForms *HR Client* database, *HRClient.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.
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 Enterprise Server](#)
- 2.4 [Configuration Document for Client Database](#)

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## 2.1 Overview

The database administrator must initially configure the eForms *Enterprise Server* and the *HR Client* 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 HR Client Database

#### 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](#))

#### 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 Enterprise Server

#### Roles

Only the ConfigManager role is needed for the *Advanced Server* database

- ConfigManager: View and modify the configuration document.

#### 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 Enterprise Server

The eForms functionality is set up through the configuration document. This section demonstrates how to set up the configuration document. 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 [New Config](#) under DB Config in the left-hand frame. The configuration document will open in the right-hand frame.

### 2.3.1 General

General
NotesToPDF
PDFToNotes
CompilePDF
Advanced

Configuration For Notes Server:   
(i.e. "myServer/MyDomain", "\*" for default config)

---

Configuration Alias:

---

Agents Run From:  This Database  
 Other Database  
 Servlet

---

Servlet Alias:

---

Log Database:   
(Leave empty to log to this database)

#### Configuration for Notes Server

PDF inFusion eForms advanced version allows for multiple configuration documents within the same database for different servers. If using this type of configuration, enter the server name here. Otherwise enter "\*", for a default configuration, across any server.

#### Configuration Alias

Configuration alias is the alias used in the servlet.properties file for this configuration of eForms. This is used by the eForms servlet as a 'short hand' way of looking up the configuration it is running off of. This allows multiple instances of the eForms servlet to be running on an individual server each with their own configuration.

#### Agents Run From

Because PDF inFusion eForms provides a client/server setup, the agents can run from another database.

- This Database: The agents will run from the current database.
- Other Database: The agents will run from the database specified in the [Agent Database Path](#) field below.
- Servlet: The agent will run from a servlet on the server. The servlet must be installed for use with this option. Refer to the PDF inFusion Enterprise Documentation.

### Agent Database Path

The path relative to the Domino data directory or the database which will run the agents. This field is hidden if “Other Database” is not selected.

Example: eForms/eFormsServerDB.nsf

### Servlet Alias

If “Servlet” is selected, enter “servlet/eForms” as the value. This field is hidden if “Servlet” is not selected. It is the extension on the URL used to reference the eForms servlet.

### Log Database

All of the agent’s activities and errors will log to this database to this database. Each agent has a setting for how much logging is desired. Leave this field blank to log to the current database. Otherwise, enter the path relative to the Domino data directory to a database created from the Lotus Notes template, loga4.ntf.

## 2.3.2 NotesToPDF Tab

The screenshot shows the configuration interface for the NotesToPDF agent. It features five tabs: General, NotesToPDF (selected), PDFToNotes, CompilePDF, and Advanced. The main content area contains three sections:

- Enable NotesToPDF:** A radio button selection where 'Yes' is selected and 'No' is unselected.
- Log Errors To:** A checkbox selection where 'Log Database' is checked and 'Server Console/Log' is unchecked.
- Additional Debug Logging:** A radio button selection where 'None' is selected, and 'Minimal Debug', 'Medium Debug', and 'Maximum Debug' are unselected.

### Enable NotesToPDF

The NotesToPDF agent takes the Lotus Notes document, converts it to FDF, and then sends the FDF to be displayed via a PDF in the browser.

- Yes: The agent will run.
- No: The agent will not run.

By disabling the agent it prevents users from running the NotesToPDF agent. An administrator may only need his/her users to perform the PDFToNotes functionality. This will allow the administrator to use the same database, and only have to set this to “No” to prevent the agent from running.

### Log Errors To

Errors for each agent can go to either the Server Console/Log and/or the Log Database specified on the General Tab.

- Server Console/Log: Will log to the Domino server console where the database resides.
- Log Database: Will log errors to the database that is set in the Log Database field on the General Tab.

### Additional Debug Logging

Each agent has a degree of error logging as follows:

- None – No logging will occur.
- Minimal – Logs the start and finish of the process plus any critical errors during the process.
- Medium – All minimal logging plus all major steps in the process.
- Maximum – All minimal and medium logging plus details included in each of the major steps to include specifics about the data.

This logging will be sent to the location specified by the Log Errors To field above.

### 2.3.3 PDFToNotes Tab

<b>General</b>	<b>NotesToPDF</b>	<b>PDFToNotes</b>	<b>CompilePDF</b>	<b>Advanced</b>
Enable PDFToNotes: <input checked="" type="radio"/> Yes <input type="radio"/> No				
Log Errors To: <input type="checkbox"/> Server Console/Log <input checked="" type="checkbox"/> Log Database				
Additional Debug Logging: <input checked="" type="radio"/> None <input type="radio"/> Minimal Debug <input type="radio"/> Medium Debug <input type="radio"/> Maximum Debug				
Save the submitted data to: <input checked="" type="radio"/> Original Notes Document <input type="radio"/> New Document <input type="radio"/> Nowhere (Use Stub Functions)				
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)				
Return URL: <input type="text"/>				

#### Enable PDFToNotes

The PDFToNotes agent receives the data from the PDF in FDF, converts it to a Lotus Notes compatible format, and saves the data in a Lotus Notes document to be stored. The PDFToNotes agent must be run from a submit button on a PDF.

- Yes: The agent will run.
- No: The agent will not run.

By disabling the agent it prevents users from running the PDFToNotes agent. An administrator may only need his/her users to perform the NotesToPDF functionality. This will

allow the administrator to use the same database, and only have to set this to “No” to prevent the agent from running.

### Log Errors To

Errors for each agent can go to either the Server Console/Log and/or the Log Database specified on the General Tab.

- Server Console/Log: Will log to the Domino server console where the database resides.
- Log Database: Will log errors to the database that is set in the Log Database field on the General Tab.

### Additional Debug Logging

Each agent has a degree of error logging as follows:

- None – No logging will occur.
- Minimal – Logs the start and finish of the process plus any critical errors during the process.
- Medium – All minimal logging plus all major steps in the process.
- Maximum – All minimal and medium logging plus details included in each of the major steps to include specifics about the data.

This logging will be sent to the location specified by the Log Errors To field above.

### Save the submitted data to

PDF inFusion eForms provides two “out of the box” options for handling the data received from the PDF. It will either save the data to the Lotus Notes document it received the data from, or create a new Lotus Notes document to save the data in. The third option, “Nowhere (Use Stub Functions)”, allows the developer to use the stub functions to retrieve, handle and send the data to the desired location.

- Original Notes Document: Saves any additional or modified data on the PDF to the Lotus Notes document from which the PDF received the data.
- New Document: Saves any additional or modified data on the PDF to a newly created Lotus Notes document.
- Nowhere (Use Stub Functions): The eForms agent will do nothing with the data. It requires the use of stub functions to retrieve, handle and send the data to the desired location.

### After PDF Form Submit

Once the form data has been submitted the browser needs to redirect the page for the user. PDF inFusion eForms provides three “out of the box” options for handling the redirection of the page.

The fourth option, “Do Nothing (Use Stub Functions)”, allows the developer to use the stub functions to redirect the page in any manner they desire.

- Use the browser\_redirect Field on the PDF: The browser will redirect to the URL contained in this field.
- Go to Value in Return URL: The browser will redirect to the URL in the Return URL field below.
- Use ITMX\_RETURN field on the PDF: The browser will redirect to the HTML contained in the ITMX\_RETURN field.

- Do Nothing (Use Stub Functions): The eForms functionality will not respond with a redirect for the browser. It requires the use of stub functions to tell the browser where to go.

Return URL

Used with the “Go to Value in Return URL” option above. Enter a URL in this field for all PDFs using this agent to return to the URL in this field.

- Example: <http://www.itmassociates.com>

**2.3.4 CompilePDF Tab**

CompilePDF is broken up into three sections: Class Configuration, Advanced Settings, and Path Configuration.

**Class Configuration**

Enable CompilePDF

The CompilePDF agent takes the Lotus Notes document, converts it to FDF, and then sends the data to a PDF form to be “merged” or “flattened”. “Merging” means the data from the Lotus Notes document is stored within the fields on the PDF form and saved. “Flattening” means the data from the Lotus Notes document is sent to the PDF form fields, the fields are removed from the PDF and the values are displayed as indelible text.

- Yes: The agent will run.
- No: The agent will not run.

By disabling the agent it prevents users from running the CompilePDF agent. For example, an administrator may only need his/her users to perform the PDFToNotes functionality. This will allow the administrator to use the same database, and only have to set this to “No” to prevent the agent from running.

Log Errors To

Errors for each agent can go to either the Server Console/Log and/or the Log Database specified on the General Tab.

- Server Console/Log: Will log to the Domino server console where the database resides.

- Log Database: Will log errors to the database that is set in the Log Database field on the General Tab.

Additional Debug Logging

Each agent has a degree of error logging as follows:

- None – No logging will occur.
- Minimal – Logs the start and finish of the process plus any critical errors during the process.
- Medium – All minimal logging plus all major steps in the process.
- Maximum – All minimal and medium logging plus details included in each of the major steps to include specifics about the data.

This logging will be sent to the location specified by the Log Errors To field above.

**Advanced Settings**

CompilePDF Logging

The CompilePDF agent also runs an executable called fdfmerge. This executable generates its own log file. The log file will go in the directory specified in the CompilePDF Log Directory, or if no directory is specified in the directory containing the PDF.

- Yes: The executable will log to a log file.
- No: The executable will not log.

CompilePDF Log Directory

Specify a complete path to the directory in which the CompilePDF log file should be created. If no directory is specified, the log file will be created in the directory containing the executable.

- Example: c:\eForms\logfile.log

CompilePDF Log File Name

A name for log file created by the CompilePDF executable. If not name is specified, the log file will be called, fdfmerge.log.

### Flatten Final PDF

The CompilePDF agent will either “merge” or “flatten” the PDF. “Merge” means the data from the Lotus Notes document is stored within the fields on the PDF form and saved. “Flatten” means the data from the Lotus Notes document is sent to the PDF form fields, the fields are removed from the PDF and the values are displayed as indelible text on the PDF.

- Yes: The PDF will be “flattened” with the data from the Lotus Notes document.
- No: The PDF will be “merged” with the data from the Lotus Notes document.

### 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\".

### Final PDF Directory

After “merging” or “flattening”, a new PDF is created and saved in this directory.

- Example: c:\eForms\complete\

### Forms Template Directory

The CompilePDF agent needs to retrieve the PDF form from a directory. This PDF form is called a “template”. Several Lotus Notes documents can use the same PDF form to create new PDF forms when “merged” or “flattened”. CompilePDF will use this directory to locate the PDF forms.

- Example: c:\eForms\PDFTemplates\

### Temporary File Directory

While CompilePDF is running it creates temporary files that it will delete when finished. These files will be placed in this directory.

- Example: c:\eForms\temp\

### The Executable Directory

CompilePDF uses executables to perform specific operations. If the executables are not already installed, they will be installed in this directory. If they are already installed, this directory needs to point to their location.

- Example: c:\eForms\Executables\

### Check for Directories

When clicked, this will run a process to locate the directories specified in the fields above. A window will pop-up displaying the name of the field, the directory contained in the field, and a “Yes” if it exists, or “Does Not Exist, Click to Create”. If you click, the directory will be created. Once the Executable Directory exists, it will say “Yes (File Installed)” or “No (Install File?)”. Click on Install File to install the executables.

### 2.3.5 Advanced

<b>General</b>	<b>NotesToPDF</b>	<b>PDFToNotes</b>	<b>CompilePDF</b>	<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		
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		
What level of authentication should the servlet use:		<input checked="" type="radio"/> Run Servlet as Server <input type="radio"/> Run Servlet Using Designated User Name and Password <input type="radio"/> Use Domino SSO		
User Name:		<input type="text"/>		
Password:		<input type="text"/>		
SSO Cookie Name:		<input type="text"/>		
<a href="#">Test for Agent Database Validity</a>				

### Operating System of Server

The operating system of the server the agents or servlet are running on. Different executables and code will run based on the operating system.

### Enable SDK Functions

SDK functions are the stub functions used to manipulate the data after it is retrieved from the Lotus Notes document and before it is sent to the PDF and vice versa. This function is not available and is hidden when “Servlet” is chosen in the Agents Run From field on the General tab.

- Yes: All stub functions used within the agents will run.
- No: All stub functions used within the agents will not run.

Disabling the stub functions helps in debugging. When a problem arises with the agents, by disabling the stub functions it runs only the basic functionality within eForms, therefore; determining if the problem is with a customization of the functionality or within the basic eForms functionality.

### Administrative ID (OS400 only)

The OS/400 administrative ID under which local commands are to run.

### Auto-generate ITMX\_SERVER

The ITMX\_SERVER field is used by PDFToNotes to determine the destination database for the data submitted by the PDF.

- Yes: The ITMX\_SERVER field on the Lotus Notes document and PDF file will be set by the NotesToPDF agent with the server on which the agent is running on.
- No: ITMX\_SERVER field needs to be filled out manually.

### Auto-generate ITMX\_AGENTDATABASE

The ITMX\_AGENTDATABASE is used by the PDFToNotes agent to determine which database the Lotus Notes document is in or should be created in. The field should contain the path and filename of a database relative to the Domino data directory.

- Yes: The ITMX\_AGENTDATABASE field on the Lotus Notes document and PDF file will be set by the NotesToPDF agent with the database in which the agent is running.
- No – ITMX\_AGENTDATABASE field needs to be filled out manually.

### Level of Authentication for Servlet

- Run Servlet as Server - It will create the notes session for all actions it performs using the servers ID, thus will run w/ the server’s authority.
- Run Servlet Using Designated User Name and Password – Run with the user credentials. Set the username and password below.
- Use Domino SSO – Will run as the authenticated web user. Set the SSO Cookie Name to “LtpaToken”.

### User Name

Used when running servlet with User Name and Password.

### Password

Used when running servlet with User Name and Password.

### SSO Cookie Name

If Use Domino SSO is selected, set to “LtpaToken”.

### 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 *HR Client* database from the web and click on [DB Config](#) in the left-hand frame. The configuration document will open in the right-hand frame.

- a. Server Agent Database Name – Name of the eForms *Enterprise 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. When using a 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

### All Employees page

1. Click on [All Employees](#) in the left-hand frame.
2. Click on a user's name. This will bring up the Employee Packet.
3. 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.
4. 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](#)).
5. The populated PDF form will come up in the right-hand frame.

### Quick Launch page

1. Click on [Quick Launch](#) in the left-hand frame.
2. 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.
3. Click on the name of the person, whose data you wish to see in the PDF form.
4. 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.
7. [Form](#) – When the [View Selected Form](#) button is pressed it will use this PDF to display the form
8. [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.
9. [Access Level](#) - Specify an access level for the PDF
10. Public - All users with reader access in the database can view this PDF.
11. Users with See Private PDF Role Only - Only the users with this role in the database ACL can view this PDF.
12. Specified People Only – Only the people entered in the field below, [Others with Access](#), will be able to see this PDF.
13. [Others with Access](#) – Enter all users’ names in this field if “Specified People Only” is selected in the [Access Level](#) selection .
14. Click [Save Document](#) to save the document in the Lotus Notes database.
15. 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: [pdfsupport@itmproducts.com](mailto:pdfsupport@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.