

# **PDF inFusion eForms 5.0**

Documentation

Standard



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ITM Products LLC.  
12530 Parklawn Dr.  
Suite 250  
Rockville, MD 20852  
U.S.A.  
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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 Standard Version includes the eForms *Standard* database and PDF inFusion *Forms Creator*.

PDF inFusion eForms *Standard* database enables users to:

- Use Adobe PDF forms to view and capture data that is stored in a Lotus Domino Database.

PDF inFusion *Forms Creator* enables users to:

- Create Lotus Notes forms from Adobe PDF forms.

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

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## 1.2 System Requirements

### 1.2.1 PDF inFusion eForms *Standard* database

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
  - Netscape 4.6 or above

### 1.2.2 PDF inFusion *Forms Creator*

1. On the user's machine:
  - Acrobat 4.05 or above
  - Lotus Notes Client 5.x or higher
  - Windows 95 OSR2, 98, ME, NT (SP6a), 2000, XP

For specific hardware requirements for Adobe products, refer to the Adobe help file.

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## 1.3 Installation

### 1.3.1 PDF inFusion eForms *Standard* database

1. Copy the eForms *Standard* database, eFormsStandard.nsf, into the Domino data directory or subfolder in the Domino data directory of the 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 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.

### 1.3.2 PDF inFusion Forms Creator

1. Close all open applications.
2. Open the PDF inFusion Forms Creator folder on the eForms CD.
3. Run Setup.exe.
4. Follow the install instructions on your screen.
5. When the install is complete, the window will close automatically or prompt you to reboot your computer.
6. From the PDF inFusion *Form Creator* folder on the eForms CD copy PDFiFormsClientTools.nsf to the user's Lotus Notes data directory.

# Chapter 2 eForms Standard DB Setup

- 2.1 Overview
- 2.2 Roles and ACL
- 2.3 Configuration Document

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## 2.1 Overview

The database administrator must initially configure the eForms *Standard* 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 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](#))

### 2.2.2 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.

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## 2.3 Configuration Document

The eForms functionality is set up through 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. If you do not see New Config then a configuration document must have already been saved. Click on All Settings under DB Config to open the already existing configuration document. The document will open in the right-hand frame.

### 2.3.1 General Tab

General NotesToPDF PDFToNotes

Enable SDK Functions:  Yes  
 No

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

1. 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.
2. Log Database – Leave blank to log activity and errors within the current 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.

General NotesToPDF PDFToNotes

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>	<b>PDFToNotes</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"/>	

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.

# Chapter 3 Using eForms Standard DB

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

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## 3.1 Overview

Once the eForms *Standard* database is configured, it is ready to be used. This section will explain how a user will use the eForms *Standard* database.

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## 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 a person's name.
2. The employee packet will come up in a manager view.
3. You can switch from the current employee packet to another user by selecting a person from the drop-down list.
4. Select a form from the drop-down list.
5. 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](#)).
6. Click on Add New PDF to add a PDF Form ([See Section 3.4](#)).
7. Click on Generate Raw XML to see the XML stream of the Lotus Notes document.

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## 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. 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.
7. Others with Access - Enter all users' names in this field if "Specified People Only" is selected in the Access Level selection .
8. Click Save Document to save the document in the Lotus Notes database.
9. 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 Viewing the PDF Form documents in the database

1. Click on Forms in the left-hand frame under "PDF".
2. A list of all PDF Form documents 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 Forms Creator Tool

- 4.1 Overview
- 4.2 ACL Setup
- 4.3 Creating the Lotus Notes Form

## 4.1 Overview

PDF inFusion eForms *Forms Creator Tool* provides the ability to create Lotus Notes forms from a PDF form. This section will explain how to setup the *Forms Creator Tool* database and how to use it.

## 4.2 ACL Setup

- 4. ACL – The ACL should contain the following minimum entries:
  - a. Users – Should have at least Author access.
  - b. User Creating Form - Designer access or higher to the database the form is being created in.

## 4.3 Creating the Lotus Notes Form

PDF Form:	Browse to the PDF Form you want to create into a Notes form <input type="button" value="Browse ..."/>
Server:	Enter Server/Domain of Notes Database where you want the form created. <input type="button" value="v"/>
Database:	Select the Notes Database in which you want the form created <input type="button" value="v"/>
Options:	<input checked="" type="radio"/> 1) Replace the form if it exists. <input type="radio"/> 2) Do not replace the form if it exists. <input type="radio"/> 3) Create unique form name if it already exists.

1. PDF Form – Enter or select the path to a PDF form, from which the Lotus Notes form will be created.
2. Server – Enter or select the server the database the Lotus Notes form is to be created on.

3. Database – Enter or select the database where the Lotus Notes form will be created.
4. Options
  - a. Replace the form if it already exists – Will replace the form of the same name with the new form being created.
  - b. Do not replace the form if it already exists – Will not create a new form and will not replace the existing form by the same name in the database.
  - c. Create unique form name if it already exists – Will create a new form with a unique form name if a form already exists of the same name.
5. Click Create Notes Form – The form will be created. After the application has finished, you will receive a confirmation of the form's creation and its location.

# Chapter 5 eForms Field Helper Tool

- 5.1 Overview
- 5.2 Using the Field Helper Tool
- 5.3 Table of Fields Added by Field Helper Tool

## 5.1 Overview

The PDF inFusion eForms *Field Helper Tool* is installed with the *Forms Creator Tool*. It is a tool within Adobe Acrobat to create PDF inFusion reserved fields and buttons. All field names match the naming convention in the eForms *Standard* database and the Submit buttons contains the needed URL to run the PDFToNotes functionality. This section will explain how to use the eForms *Field Helper Tool*.

## 5.2 Using the Field Helper Tool

1. Open Adobe Acrobat.
2. Open up the PDF where you would like to add the fields.
3. Under the Tools Menu, click on PDF inFusion.
4. You will see a list of the available tools.

## 5.3 Table of Fields Added by Field Helper Tool

Enable PDF for Standard eForms	Adds name and address fields, required hidden fields, and a submit button.	browser_redirect; docID; ITMX_AGENTDATABASE; ITMX_DATABASE; ITMX_FORM; ITMX_SERVER; SUBMIT button; CityHome; CompanyName; CountryHome; EmailAddress; FirstName; JobTitle; LastName; MiddleName; SSN; StateHome; StreetHome; ZipHome
Add required eForms Fields	Adds the required hidden fields that are used in eForms.	browser_redirect; docID; ITMX_AGENTDATABASE; ITMX_DATABASE; ITMX_FORM; ITMX_SERVER
Add eForms Submit Button	Inserts a standard Submit button that will submit the form data to the server defined in the ITMX_SERVER and ITMX_AGENTDATABASE fields.	SUBMIT button
Add eForms Clear Button	Adds a reset button to the PDF. Button action does NOT remove the values of eForms required hidden fields.	CLEAR button

PDF inFusion Developer Tools\Generate List of Field Names	Generates an alphabetical list of all fields contained in the current PDF. Output is displayed in the Adobe JavaScript Console.
PDF inFusion Developer Tools\Flatten Current PDF	Flattens the current PDF.
PDF inFusion Developer Tools\Clear All Field Values	Resets all field values to the default value (blank, unless a default value has been set).

# Chapter 6 Support

## 6.1 Support

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### **6.1 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

- ❖ **ConfigManager role**  
ACL role needed to manage the Configuration document, within the *eForms Standard* database.
- ❖ **Configuration document**  
A Lotus Notes document in the *eForms Standard* database. It contains all settings for the eForms functionality.
- ❖ **eForms Field Helper Tool**  
A tool within Adobe Acrobat to create PDF inFusion reserved fields and buttons.
- ❖ **Employee Application**  
A Lotus Notes document the *eForms Standard* database uses to enter data into the Lotus Notes database.
- ❖ **Employee Packet**  
The Lotus Notes form used to launch the eForms functionality, displaying the data in the PDF form.
- ❖ **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 Standard* database. 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.