

PDF inFusion eForms 4.6

Administrator Documentation



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1 PDF inFusion eForms: Getting Started

1-1 Overview

This chapter covers a general overview of PDF inFusion eForms system requirements and installation procedures. This includes configuration of the domino server, creation of the eForms database from the PDF inFusion eForms Template and database specific security settings for the proper functioning of the eForms database. Section listings:

- 1-1 Overview
- 1-2 CD Contents
- 1-3 System Requirements
- 1-4 Installation and Set-up

1-2 CD Contents

PDF inFusion eForms includes the following:

Three Domino Databases:

1. **PDFiFormsServer.ntf:** contains the four agents for processing form data and runs on a Domino 5.0 or higher server.
2. **PDFiFormsTools.nsf:** contains administrator and developer tools and agents. Requires PDF inFusion Forms Creator to be installed.
3. **PDFiFormsSample.nsf:** contains a sample eForms application.

A PDF inFusion Forms Creator Install which includes the eForms Acrobat tools plug-in (for PDFiFormsTools.nsf).

Server Tools: FDFmerge.exe and AppendPDF.exe for the GeneratePDF and AppendPDF agents.

1-3 System Requirements

PDF inFusion eForms requires a minimum of Lotus Domino 5.0 server for access. ITM recommends using the Lotus Domino R5 server.

Setting up PDF inFusion for eForms involves a three-step process:

1-4 Installation and Set-up

Step One: Create Files For Your eForms Database Server

1. First, copy all the files needed for eForms.
 - Copy the PDFiFormsServer.ntf template into your Domino\Data directory running the HTTP Server Task (if you choose a subdirectory, it won't show up in the new database dialog)
 - Copy the PDFiFormsSample.nsf database to the same Domino server as the PDFiFormsServer.ntf template. (the sample database can be in a subdirectory)
 - **Note:** Do not include any spaces in either the filename or the directory of the eForms Sample Database.
 - Create a subdirectory on the Server (we recommend c:\eForms) and copy the two executables (FDFmerge.exe and AppendPDF.exe) to this directory.
 - **Note:** the executables can be placed anywhere on the server's file system
2. The PDFiFormsSample database contains all of the files necessary to get eForms working right away. If you wish to run the PDFiFormsSample database as a stand-alone system go to Step 4. If you wish to run eForms in a Client-Server configuration please proceed with Step 3.
3. From the Notes Client, create a new database on the server from the PDFiFormsServer template.
4. Now you must sign the database that will act as the eForms Server. If you are running the PDFiFormsSample database as stand-alone system this will be the sample database, otherwise it will be the PDFiFormsServer database created in Step 3.

Note: The signer of the database must have permission to run unrestricted LotusScript Agents on the Domino Server.
5. To sign the database, open Domino Administrator. Choose the server and then highlight the eForms Server Database. In the upper right, select the tools menu, database, and sign or click the files tab and choose sign. In the "Sign" dialog box, choose "All Design Documents" and click "OK". The eForms Server is now ready to be configured.
6. The ACL for the eForms server should, at a minimum, contain the following entries:
 - <signer of database> minimum author access, editor or above recommended – this will allow the agent to create log entries
 - <eForms users> reader access – this will allow the users to call the eForms agents located on the eForms server.
 - <anonymous> no access – this forces users to authenticate
 - <DB Managers> minimum of author access with the "[ConfigManager]" role – this will allow the Manager to create and edit the configuration of the eForms Server.

Step Two: Configure and Enable the Agents

1. Open your web Browser, go to your newly created eForms Server Database, and login as a user with the ConfigManager role. You should see the welcome screen. From the navigator on the left select "DB Config." If you do not see a DB Config Option Please ensure that you have the "ConfigManager" role in the ACL of the Server Database. From the DB Config menu select "New Config." You should at this stage see a new configuration document in the main window.
2. For use with the Sample Database, use the following recommended settings:

The General Tab:

- Configuration For Notes Server: either "*" or select the server on which the database resides. Please use the abbreviated format of the server name (i.e. MyServer/MyDomain)
- Agents Run From This Database: "No"
- Server Agents Database Name: Relative to the Notes data directory
- Enable SDK Functions: "Yes"
- Database Logs To: Leave blank to allow the log to go to the Agent Database.
- Operating System of Server: choose the operating system of your server.

Go to the NotesToPDF Tab:

- Leave the values at the Default. The Agent should be enabled, the logging should go to the Agent Log, and the logging level should be at none.

Go to the PDFToNotes Tab:

- Leave the values at the Default. The Agent should be enabled, the logging should go to the Agent Log, and the logging level should be at none.

Go to the MergePDF Tab:

- Enable the GeneratePDF Agent: "Yes"
- Log Errors To: Agent Database Log
- Additional Debug Logging: "None"
- Final PDF Directory: For Windows "c:\Lotus\domino\data\domino\html\pdf_final\" for other operating systems use the equivalent path such as "/local/notesdata/domino/html/pdf_final/" for Linux. This will enable the sample database provided to correctly display the Generated PDF over the web.
- GeneratePDF Working Directory: For Windows "c:\eForms\working\"
- Final FDF Detach Directory: For Windows "c:\eForms\FDFData\"
- FDFMerge Log Directory: For Windows "c:\eForms\Log\"
- FDFMerge Executable Path: For Windows "c:\eForms\bin\"
- Flatten Final PDF: "Yes"
- FDFMerge Timeout: 15 seconds
- Scan for PDF file: "Yes"

Go to the AppendPDF Tab:

- Enable the AppendPDF Agent: "Yes"
- Log Errors To: Agent Database Log
- Additional Debug Logging: "None"
- Final PDF Directory: For Windows
"c:\Lotus\domino\data\domino\html\pdf_final\"
- AppendPDF Working Directory: For Windows "c:\eForms\working\"
- AppendPDFMerge Executable Path: For Windows "c:\eForms\bin\"

3. Click "Save Options." You should now be on the General Tab of your newly created configuration document. Click on the "Test for Agent Database Validity" link at the bottom of the page. You should be presented with a page listing the Agent Database followed by an entry for each of the eForms agents. If all calls were not successful please check all entries and make sure they are correct. Close the eForms Server Database.

4. Go to the Merge PDF Tab. At the bottom of the Path Configuration section click on the "Check for Directories" link. You should be presented with a list of the directory entries for the server on which the Agent is running. If the user who is logged in has access to run unrestricted agents you can click on the links on the right side of the table to create the directories. Or you may create the directories by hand on the server and confirm their creation by clicking on the "Check for Directories" link. Once the directories for the executables have been created you will be presented with an option to install the executable. You may install select "Install Executable" to install or you may place the appropriate executables on your server manually in the specified directory. Once installed ensure that the files have execution privileges on the server, if they do not the Merge and Append PDF will not function correctly.

Step Three: Configure the eForms Sample Database

1. Move to the eForms Sample Database (PDFiFormsSample.nsf)

2. The ACL for the eForms Sample should, at a minimum contain the following entries:

- <signer of eForms Server Database> editor or greater – this allows the eForms agent to create and edit documents
- <eForms users> author access or above – this will allow them to create new documents. Note: If the user has author access she will only be able to see public documents and documents that she created.
- <Configuration Managers> minimum of author access with the "[ConfigManager]" role – this will allow the Manager to create and edit the configuration of the eForms Server.
- <PDF Managers> minimum of author access with the "[PDFManager]" role – this will allow the PDF Manager to create and edit the PDF Forms contained in the sample database.
- <anonymous> no access – this forces users to authenticate

3. If you are running the Sample database in stand-alone system then all configuration was done during eForms Server configuration continue to Step X. If you wish to run eForms in a Client-Server configuration please proceed with Step 4.

4. Open your web Browser, go to your newly created eForms Sample Database, and login as a user with the ConfigManager role. You should see the welcome screen. From the navigator on the left select "DB Config." If you do not see a DB Config Option Please ensure that you have the "ConfigManager" role in the ACL of the Server Database. From the DB Config menu select "New Config." You should at this stage see a new configuration document in the main window.

Configuration For Notes Server: either "*" or select the server on which the database resides. Please use the abbreviated format of the server name (i.e. MyServer/MyDomain)

Agents Run From This Database: "No"

Server Agent Database Name: Type in the path to your eForms server database relative to your Domino data directory

5. Click "Save Options." You should now be on the General Tab of your newly created configuration document. Click on the "Test for Agent Database Validity" link at the bottom of the page. You should be presented with a page listing the Agent Database followed by an entry for each of the eForms agents. If all calls were not successful please check all entries and make sure they are correct.

6. Open a web Browser on a client PC and go to the URL of the Sample Database.

- Click on "New Application"
- Enter Your Information and click "Create New Employee Packet"
- Select a form and click on "View Selected Form."
- Fill out Fields (including applicant name, etc) on the Form and click "Submit"
- Go back to the PDF Form to confirm that your information has been saved.
- **Note:** You can also open the sample database in Notes and click on the "Manager" View to verify the document has been saved.

2 PDF inFusion Support

While this documentation provides the information you need to understand and use PDF inFusion eReview, 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: pdfinfusionsupport@itmassociates.com.

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