

## **Troubleshooting Custom Form Documents**

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This article provides suggestions for troubleshooting issues with custom form documents and tips for making requests to Campus Support:

Tips for Creating a Custom Form | Tips for Submitting Issues to Campus Support | Edit a Secured PDF Using Adobe | Other Common Custom Forms Errors/Tips

## **Tips for Creating a Custom Form**

Any time you create a Custom Form Document, optimize the form to reduce size and eliminate unexpected metadata and hidden information that may have come from a previous application such as Microsoft Word. When forms are created in these other applications and then converted to PDF files, there is often a great deal of formatting code added behind the scenes. This extra data makes the file much larger than necessary and could result in printing inconsistencies.

Only PDFs created using Adobe Acrobat Professional or Adobe DC are supported for Custom Form creation.

All Custom Forms should be run through the Action Wizard prior to deployment.

Complete the following setup to create a customized Action in the Action Wizard:

- 1. In Adobe, navigate to Tools > Action Wizard
- 2. Click Create New Action. The Create New Action menu displays.

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Highlight Existing Fi	elds	Fontent Editing
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		▹ Forms ▼ Attion Wizard
West Plains R-VII		Create New Action
ION REPORT		Manage Actions Find More Online
w of data that assists in determining whether a student is eligible n to assist with IEP development. The evaluation process should		Actions
disability, (2) whether the disability adversely affects his/her ature and extent of the student's need for specially designed eview of the evaluation results, a group of qualified professionals		Image: Second state       Image: Second
gible for special education.		Publish Sensitive Information
Reevaluation	L	Optimize for Web and Mobile
rmation		Coptimize Scanned Documents
Birth: Age:		Prepare for Distribution
		Text Recognition
Phone:		Protection

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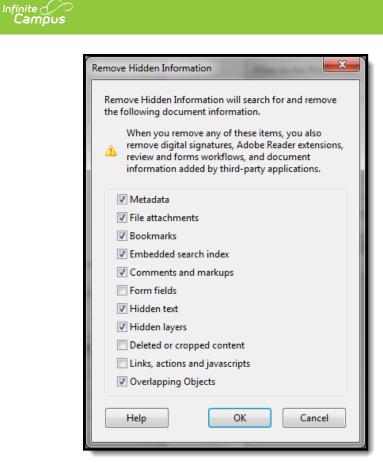
3. In the Create New Action Menu, navigate to Protection and select Remove Hidden Information.

noose tools to add:	Action steps to show:	
Content	Files to be Processed	5
Pages		
• Forms	Currently open file as default	
Recognize Text		
- Protection	Default option:	-
📀 Encrypt	Add Files	•
-	Untitled	
Mark for Redaction	Remove Hidden Information	
🙈 Apply Redactions	Specify Settings	
🔏 Search & Remove Text	Specify Settings     Prompt User	
Remove Hidden Information		
🎲 Sanitize Document		
Document Processing		
Accessibility		
> Save & Export		
Go To		
More Tools		

- 4. Click Specify Settings and unmark the following options:
  - Form Fields

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- Deleted or Cropped Content
- Links, Actions, and Javascripts



5. In the Create New Action menu, navigate to Document Processing and mark Reduce File Size.

Choose tools to add:	_	Action steps to show:	
➤ Content		Files to be Processed	Ŀœ
<ul> <li>Pages</li> <li>Forms</li> </ul>		Currently open file as default	<u>(</u>
▶ Recognize Text			
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🔛 Page Transitions	$\xrightarrow{\bigcirc}$		Î
🛱 Reduce File Size		8= Specify Settings Prompt User	
🛃 Set Open Options			
Create Bookmarks from Stru			
Accessibility			
▶ Save & Export			
→ Go To			
More Tools			

6. Save the Action.

Once all form fields are added and formatted as desired, run your customized Action on the completed form and save the resulting file. The form is now ready to be uploaded and used.

#### **Recommended Text Field Properties**

- Text field properties should never include scrolling long text.
- Multi-line text should only be used for text fields that are taller than one line.
- Using unsupported fonts may cause text to be unreadable. Supported fonts include:
  - Helvetica
  - Times New Roman
  - Times Roman
  - Courier

#### **Other Best Practices**

- Use checkboxes instead of radio buttons because a radio button cannot be unmarked once selected.
- List Boxes, Signature fields, and Bar Codes are not supported field types.
- Limit the use of Buttons or javascript.
- Form field names should be as short as possible. Do not let Adobe automatically name form



fields.

- Do not use the Form Field Recognize wizard offered when editing an form with no form fields. Decline this offer and add forms manually.
- Only use multi-line text fields when fields should have multiple lines of text. This may cause forms to print unnecessary pages. Users should select auto-font for text fields that should not print on a second page, such as names, dates, addresses, etc.

#### **Tips for Submitting Issues to Campus Support**

To simplify the process of submitting a case with Campus Support, please collect the following information:

#### **Identify the Form**

Campus Support needs to know if the form in question is one created by the user or the district. Additionally, Support needs the name of the actual file in question, rather than the name that displays in the Documents tabs in Student Information. The file name is found in System Administration > Module (such as Special Ed) > Custom Forms > Document Name.

In this example, the display Name is Counselor Meeting Notes, but the Document Name of the file is Counselor Meeting Notes\_2017-04-03-15-35-56.pdf:

Users can enter data directly into the form using the interface. E fields. Interactive forms are located in the Forms tool and in the	Existing data from Campus can be prepopulated into the form using Ad hoc module's Documents tab.
Module	
Counseling	
Name *	
Limit 50 characters.	
Counselor Meeting Notes	
PDF Counselor Meeting Notes_2017-04-03-15-35-56.pdf	
Sequence The sequence determines the order the document displays in the Forms to 0	pol and in the module's Documents tab when a user creates a new form for a person.
Cancel	ete 🚺 Save & Next >
Custor	n Form Display Name

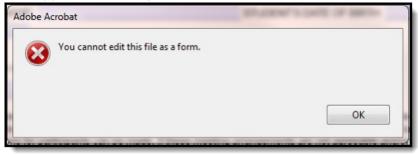
The Uploaded by field is also useful for determining if the file is maintained by Campus or a particular district:

Instructions Enter any instructions rec	rding this form. Instructions are vi	sible for the user filling ou	it the form for a person. Lin	nit 500 characters.	
Form Count					<i>h</i>
Number of forms associa	ed to person records.				
1					
Uploaded By Plainview Schools					

If the file is maintained by the district, the person submitting the case to Campus Support will need to attach the original form to the case (not just a screenshot).

# **Edit a Secured PDF Using Adobe**

1. Confirm the document is secured by opening the document and selecting Tools > Edit. An error appears indicating the form cannot be edited.



2. Go to File > Print.

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3. Select the "Microsoft XPS Document Writer" in the Printer dropdown. Click Print.



Print	×
\\Camplitil 1 InfiniteComput com\1\// Picoh	anced Help 🕢
Pages to       \\CampUtil-1.InfiniteCampus.com\Localization_Ricoh         Image: All Adobe PDF       Fax         Curren       Fax         Microsoft XPS Document Writer         Pages       Send To OneNote 16         More Options	Comments & Forms Document and Markups Summarize Comments Scale: 96%
Page Sizing & Handling (a)         Size       Poster       Multiple       Booklet         Fit       Actual size       Shrink oversized pages       Custom Scale:       100       %         Choose paper source by PDF page size       Print on both sides of paper	8.5 x 11 Inches
Orientation:	
Page Setup	< Page 1 of 1 Print Cancel

4. A progress bar displays:

Progress	
	Cancel
Printing: nc_conf_34-57d_orig.pdf: 0%	

5. A "Save the file as" screen displays. Determine the location and file name of the document and then click save. The document will be saved as an XPS document.

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<b>P</b>		My Received Files	2/7/2017 6:41 AM	File folder
Libraries Documents	- 11	Network Monitor 3	12/13/2016 4:29 PN	1 File folder
Documents Music		퉬 SQL Server Management Studio	1/19/2017 7:35 AM	File folder
Pictures				
Videos				
🖳 Computer	-	<		
File name:	*.xps			
Save as type:	XPS Do	ocument (*.xps)		

6. Close the document in Adobe.

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7. Open the document using XPS Viewer by double-clicking the document.

File • Permissions •	Signatures 🔻	🗐 🖶 🥙 🕶 Find	+ م	•
	PARENT/GUARDIAN NOTIFICATION OF CONFERENCE			
	DATE:STUDENT'S NAME:STUDENT'S DATE OF BIR Dear; (Parent(s)/Guardian(s) Name)	тн:		
	In order to discuss the educational needs of your child, you are invited to attend an IEP conference meeting to be held:			

- 8. Click File > Print.
- 9. Select the "Adobe PDF" in the Printer options window. Click Print.

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Select Printer	
Add Printer	Fax
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Status: Ready	Print to file Preferences
Location: Comment:	Find Printer
comment.	
Page Range	
Al	Number of copies: 1
Selection	Page
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10. A "Save the file as" screen displays. Determine the location and file name of the document and then click save. The document will be saved as an executable PDF document.

🔫 Save PDF File As			×
G ♥ • Libraries	► Documents ► 🗸 🐓	Search Documents	٩
Organize 🔻 New folder	r	8==	• 0
▲ 🔆 Favorites	Documents library Includes: 2 locations	Arrange by: Fo	older 🔻
Downloads	Name	Date modified	Туре
Recent Places	鷆 Custom Office Templates	1/6/2017 9:51 AM	File folder
🖛 🖂 Libraries	퉬 My Received Files	2/7/2017 6:41 AM	File folder
Documents	퉬 Network Monitor 3	12/13/2016 4:29 PM	File folder
▷ ▲ Music	鷆 SQL Server Management Studio	1/19/2017 7:35 AM	File folder
▷ E Pictures			
Videos			
<ul> <li>▲ I Computer</li> <li>▶ ▲ Local Disk (C:)</li> </ul>	< III		Þ
File name: secure	dtononsecured		-
Save as type: PDF file	es (*.PDF)		•
) Hide Folders		Save	Cancel

11. The new PDF displays in Adobe. Go to Tools > Edit to edit the document. Complete the updates as needed and save the PDF.

#### **Other Common Custom Forms Errors/Tips**



- Admin should create the form in Word. Using Google Docs is not supported.
- List box, digital signature, and bar code fields are not supported.
- Admin should remove all custom print and save buttons on the form.
- Only use multi-line text fields when fields should have multiple lines of text. Using multi-line text fields for single line text may cause forms to print unnecessary pages. Users should select auto-font for text fields that should not print on a second page, such as names, dates, addresses etc.
- Recommended fields to use for parent's name:
  - Contacts.lastName
  - Contacts.firstName
  - Contacts.relationship
- Recommended fields to use for Special Ed:
  - teamMember.lastName
  - teamMember.firstName
  - teamMember.title

Problem	Possible Diagnosis
Student Information > [Module] > General > Documents Text is disappearing when the form is printed.	<ul> <li>This problem may be caused by the following:</li> <li>Form has a border color around the text field.</li> <li>Form has a fill color in a text field.</li> <li>Form has symbols or special characters that are not supported.</li> <li>Overflow text exceeds 1 MB per field.</li> <li>User is using an unsupported font type. Supported font types include: <ul> <li>Helvetica</li> <li>Times New Roman</li> <li>Times Roman</li> <li>Courier</li> </ul> </li> </ul>
System Administration > [Module] > Custom Forms A Form Admin is unable to upload a form.	<ul> <li>This problem may be caused by the following:</li> <li>The form file is larger than 4 MB.</li> <li>The form has the wrong file name extension (needs to be .pdf).</li> <li>The field names are too long. Field names cannot exceed 300 characters.</li> </ul>
Extra pages are printing	The multi-line text option has been selected when the form was created. Multi-line should not be used for names, dates, or addresses. Use the auto-font option or a standard font size instead of the multi- line option when creating the form.
Empty space is printing after text fields	<ul> <li>This problem may be caused by the following:</li> <li>a browser setting for Chrome at Settings &gt; Appearances &gt; Font Size. Make sure the Font Size is set to the recommended setting (Medium).</li> </ul>



Problem	Possible Diagnosis
Overflow text fields are not working.	The overflow field in Adobe should be formatted with auto-font, multi-line, and scroll long text.