

# **Troubleshooting Custom Forms**

Last Modified on 10/22/2022 10:45 am CDT

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

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
  - Recommended Text Field Properties
    - Other Best Practices
- Tips for Submitting Issues to Campus Support
  - Identify the Form
- Editing 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.

These tips apply to Adobe Acrobat Professional. Other versions of Adobe may not have equivalent functionality.

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.

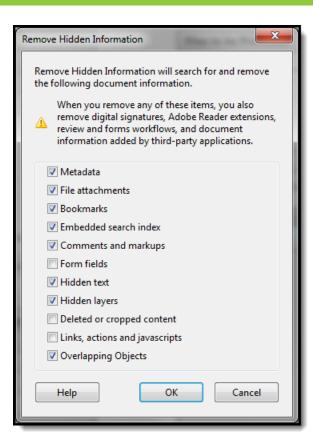
	_ 0 ×
là 🗳 🄁	Customize 👻
	Tools Fill & Sign Comment
Highlight Existing Field	• Content Editing
	Fages     Interactive Objects     Forms
West Plains R-VII	Action Wizard
ION REPORT	Create New Action  Manage Actions  Find More Online
w of data that assists in determining whether a student is eligible n to assist with IEP development. The evaluation process should disability, (2) whether the disability adversely affects his/her lature and extent of the student's need for specially designed eview of the evaluation results, a group of qualified professionals	Actions            ¥≣         Make Accessible             ¥≣         Archive Documents
gible for special education.	Image: Second state       Image: Second state         Image: Second state       Image: Second state
rmation	Optimize Scanned Documents
Birth: Age:	Prepare for Distribution
Phone:	Text Recognition     Protection

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

hoose tools to add:		Action steps to show:	
▶ Content		Files to be Processed	Ŀ
▶ Pages		Currently an an file on default	
▶ Forms		Currently open file as default	G.
▶ Recognize Text			
✓ Protection		Default option:	-
🛞 Encrypt		👌 Add Files 🔻	
V Encrypt		Untitled	
Mark for Redaction		Remove Hidden Information	
💰 Apply Redactions			
	⊕_	8 Specify Settings	_
🔏 Search & Remove Text		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

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



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

hoose tools to add:	Action steps to show:	
▶ Content	Files to be Processed	E.
▶ Pages	Currently open file as default	
▶ Forms		G
▶ Recognize Text		
Protection	Default option:	
- Document Processing	Untitled	
<ul> <li>Preflight</li> <li>Number Pages</li> <li>Page Transitions</li> <li>Reduce File Size</li> <li>Set Open Options</li> <li>Create Bookmarks from Stru</li> </ul>	Image: Contracted         Image: Reduce File Size         Image: Reduce File Size         Image: Specify Settings         Image: Prompt User	
Accessibility		
Save & Export		
▶ Go To		
More Tools		

5. 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.
- Use the Reserved Names document to upload and test all the reserved name fields.
- 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:

Module							
Counseling			_				
Name *							
Limit 50 characters.							
Counselor Meet	ing Notes						
PDF							
	ig Notes_2017-04-03	-15-35-56.pdf					
Sequence							
	mines the order the docur	ment displays in the F	orms tool and in	the module's Docur	nents tab when a user	creates a new form for a	person.
0							

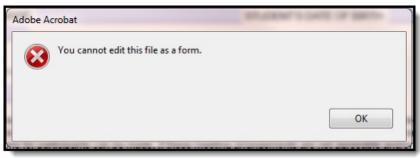
The Uploaded by field is also useful for determining if the file is maintained by Campus or a particular district:

amï	ous Dus	
		11
	Instructions	
	Enter any instructions regarding this form. Instructions are visible for the user filling out the form for a person. Limit 500 characters.	
	Form Count	
	Number of forms associated 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).

# **Editing 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.
- 3. Select the "Microsoft XPS Document Writer" in the Printer dropdown. Click Print.



Print	
\\Camplitil 1 InfiniteCampus com\1W Ricoh	vanced Help 🕢
Adobe PDF     Currer     Fax     Microsoft XPS Document Writer     Pages     Send To OneNote 16     More Options	Comments & Forms       Document and Markups       Summarize Comments       Scale: 96%
Page Sizing & Handling       Image: Size       Image: Poster       Image: Booklet         Image: Size       Image: Poster       Image: Booklet       Image: Booklet         Image: Fit       Image: Actual size       Image: Booklet       Image: Booklet         Image: Actual size       Image: Shrink oversized pages       Image: Custom Scale:       Image: Image: Shrink oversized page size         Image: Choose paper source by PDF page size       Image: Shrink oversized page size       Image: Shrink oversized page size         Image: Print on both sides of paper       Orientation:       Image: Shrink oversized page size         Image: Auto portrait/landscape       Image: Shrink oversized page size       Image: Shrink oversized page size	
<ul> <li>Portrait</li> <li>Landscape</li> </ul> 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.

Save the file as			×	
😋 🔾 🗢 📑 🕨 Libraries	s 🕨 Documents 🕨	✓ 4 Search Docum	ents 🔎	
Organize ▼ New folder 🕅 🖽 ▼ 🔞				
▲ 🔆 Favorites	Documents library Includes: 2 locations	Arrang	e by: Folder 🔻	
Downloads	Name	Date modified	Туре	
Recent Places ≡	Custom Office Templates	1/6/2017 9:51 AM	File folder	
4 🔚 Libraries	퉬 My Received Files	2/7/2017 6:41 AM	File folder	
Documents	Network Monitor 3	12/13/2016 4:29 PM	File folder	
Music	🌡 SQL Server Management Studio	1/19/2017 7:35 AM	File folder	
Pictures				
🖻 🚼 Videos				
4 🖳 Computer 🔻	• •		•	
File name: *.xp	s		-	
Save as type: XPS	Document (*.xps)		•	
Hide Folders		Save	Cancel	

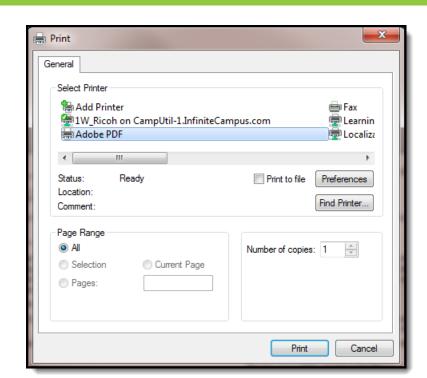
6. Close the document in Adobe.

Infinite Campus

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

File	Signatures 🔹 🔳 👼 🖑 🔹	Find P 🗸 🔞
	PARENT/GUARDIAN NOTIFICATION OF CONFERENCE	
	DATE:STUDENT'S NAME:STUDENT'S DATE OF BIRTH: Dear; (Parent(s)/Guardian(s) Name) 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.



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		State of Lot of	×
Correction → Libra	ries 🕨 Documents 🕨 👻 🛃	Search Documents	Q
Organize 🔻 New folder 🛛 🔠 👻 🔞			• 🔞
▲ ★ Favorites ■ Desktop	Documents library Includes: 2 locations	Arrange by: Fo	older 🔻
Downloads	Name	Date modified	Туре
🔚 Recent Places	Custom Office Templates	1/6/2017 9:51 AM	File folder
▲ □ Libraries	My Received Files	2/7/2017 6:41 AM	File folder
Documents	Network Monitor 3	12/13/2016 4:29 PM	File folder
🖻 🎝 Music	SQL Server Management Studio	1/19/2017 7:35 AM	File folder
Pictures			
Videos			
✓ I United Computer ▷ ▲ Local Disk (C:)	▼		Þ
File name:	ecuredtononsecured		-
Save as type: F	DF files (*.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>



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