



A Guide to Creating PDF Forms

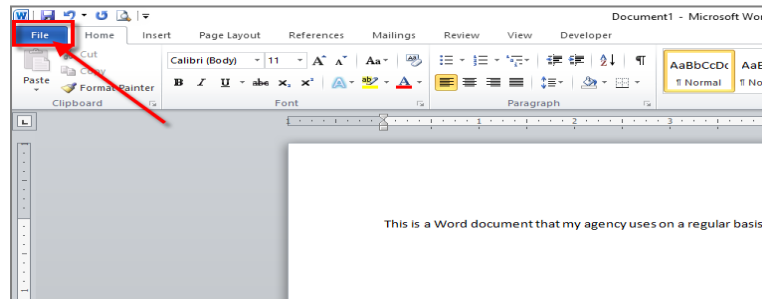
The Forms module allows users to create forms that staff can utilize while in the field. Any PDF forms can be created, and users must have Expert PDF to create these forms. There is an annual cost for this program.

List of Topics

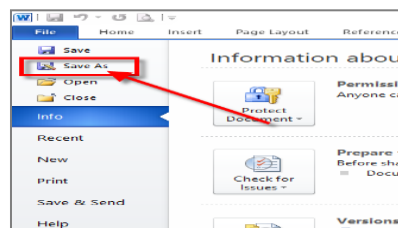
- Set-Up Requirements for Creating a Form
- What are Annotations and Why are They Important?
- How to Create a PDF Form for Gatekeeper

Set-Up Requirements for Creating a Form

- User must have Expert PDF installed on their system. This does not need to be on the server but can be on the employee's computer.
- User must have the most up-to-date DLLs added to their system. Email support@primarysolutions.net for assistance.
- The document to be used needs to be in PDF format. If the form is a Word document (.doc) or an Excel spreadsheet (.xlsx), Word or Excel can format the existing document to PDF for use in Expert PDF. See the instructions below for Word and Excel (note: your screens may appear different depending on the version of Word being used).
 - Open the document and click 'File'



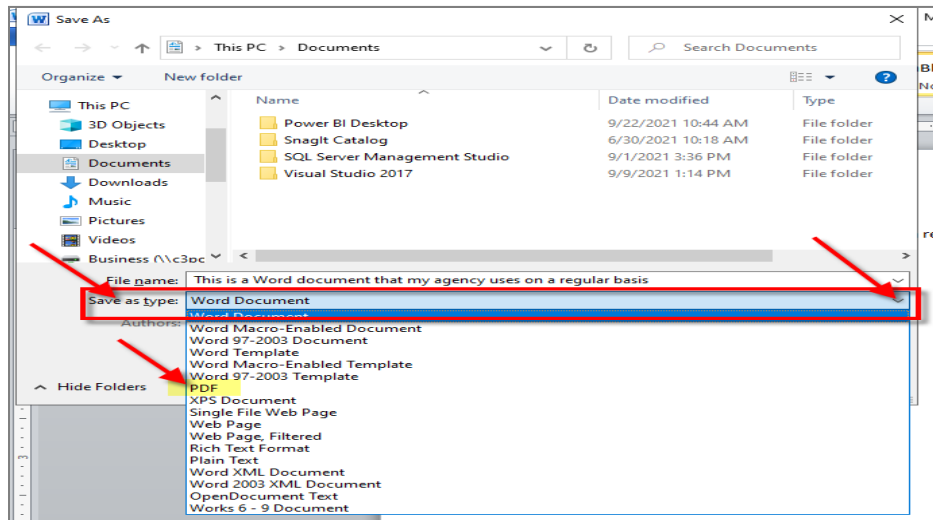
- Click 'Save As'



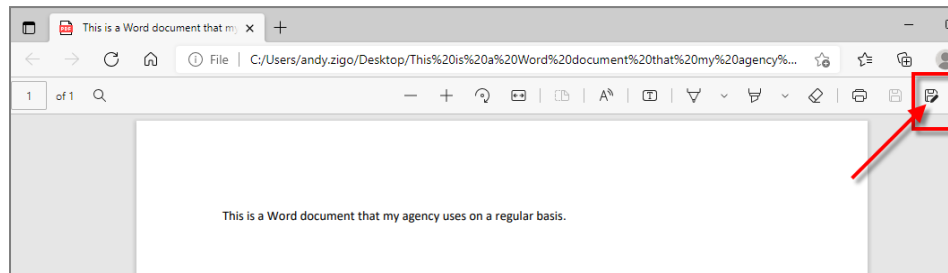
- This will open the Save As dialogue box where the User will select 'Save as type' and choose 'PDF' in the dropdown.



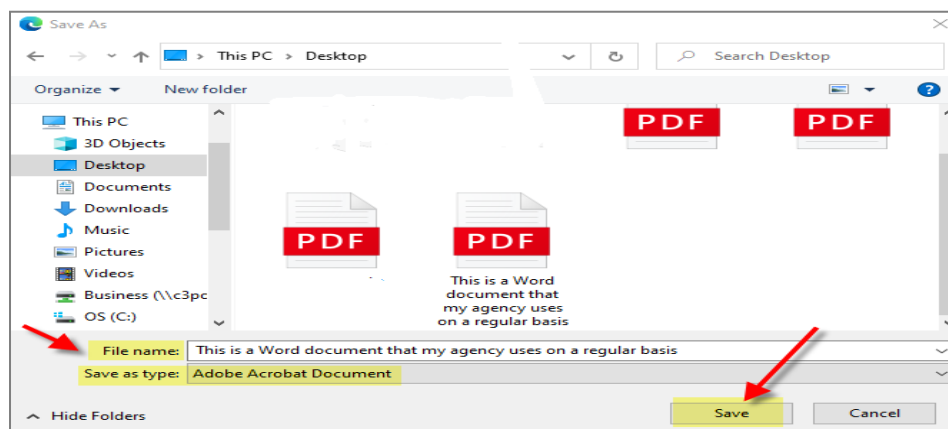
A Guide to Creating PDF Forms



- The document will then open up as a PDF in a browser window where you can select 'Save as' (floppy disk icon).



- From here, the document (now a PDF), can be renamed and a location selected.



- Your Word or Excel document is now a PDF and ready for use in Expert PDF.



A Guide to Creating PDF Forms

What are Annotations and Why are They Important?

Annotations are bookmarks in the PDF that pull information from your database directly into the form when the User adds it in Anywhere. Examples of annotations may be the Consumer Name, Location, etc. There are specific annotations that have been created. Please see the Gatekeeper Annotation Listing document.

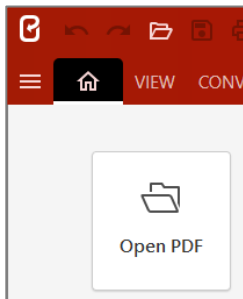
Primary Solutions can add additional annotations, but this would need to be done during a release. Please contact our Support at Support@primarysolutions.net if you need additional annotations added to your system.

How to Create a PDF Form

- Open Expert PDF (double-click the icon)



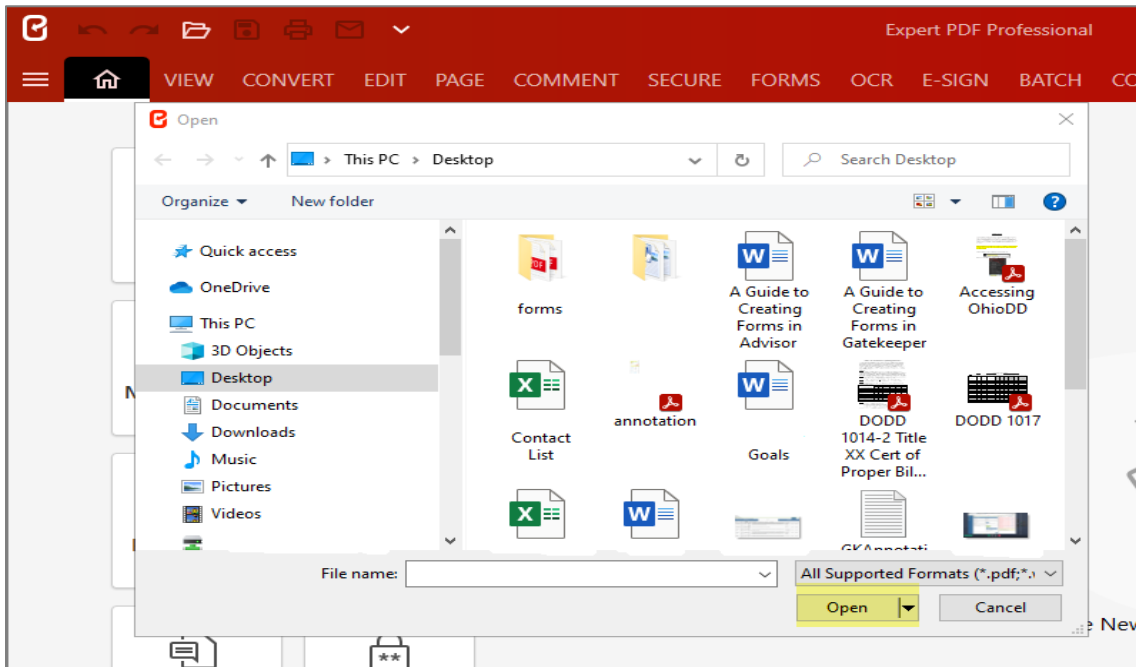
- Select 'Open PDF'



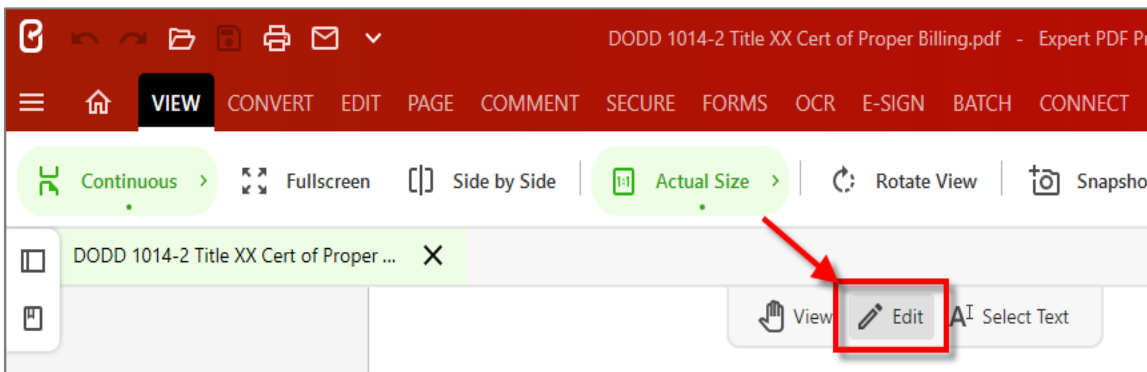
- Click 'Browse' to select your document from the dialogue box and click open.



A Guide to Creating PDF Forms



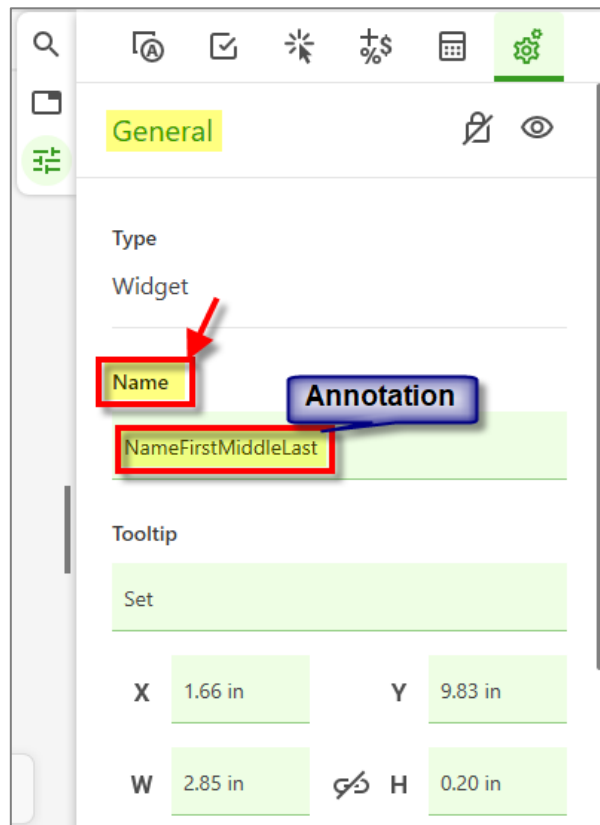
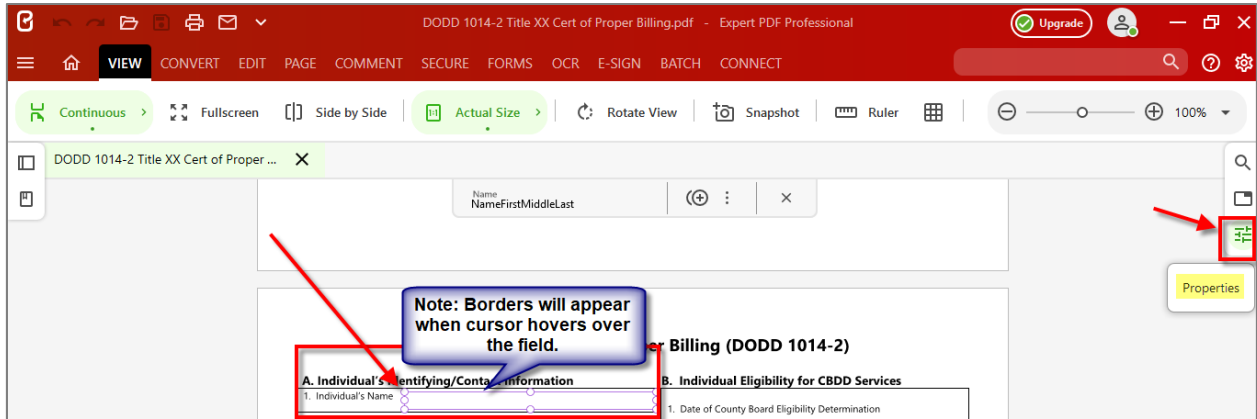
- Click 'Edit' that appears at the upper middle of the screen.



- Click in the field to be edited – go to 'Properties' on the right and choose 'General' (gear icon). Under 'Type > Name', enter the desired annotation for the database (NameFirstMiddleLast in the example below). **Important note: Once a field has an annotation attached to it, that field is not able to be edited when opened in Gatekeeper or Anywhere.**



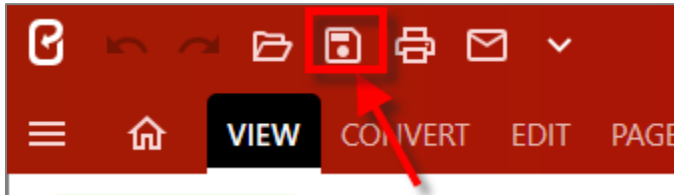
A Guide to Creating PDF Forms



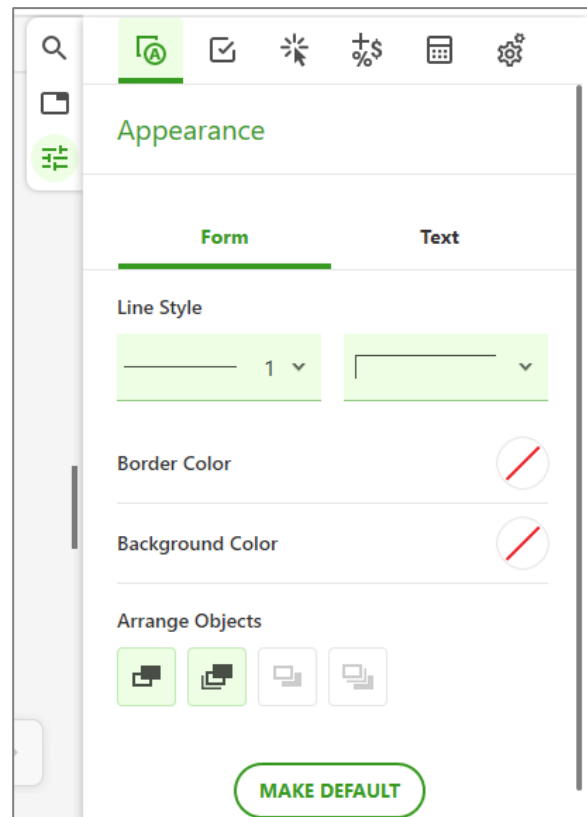
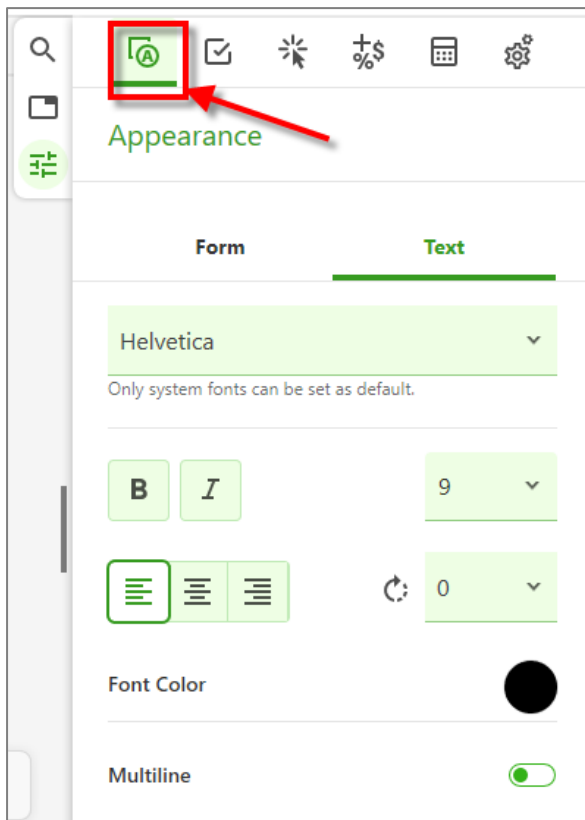


A Guide to Creating PDF Forms

- Hit 'Enter', click in another section or hit the 'Save' icon in order for the change to be updated



- Choose 'Appearance' Properties (screen/circle 'A' icon) to update the font color (i.e. change to black), font size or background appearance for that field.





A Guide to Creating PDF Forms

- Once the desired changes are completed, click SAVE (floppy disk icon) or FILE (3 lines aka 'hamburger button') and then 'Save as'. Save in the psiserv/FormTemp folder. This will allow document use in Gatekeeper.

