



LaserVault Imaging PDF Forms Guide

<http://www.laservault.com>

Overview

This guide will take you through the process of setting up and using PDF forms in LaserVault Imaging. With PDF Forms you can create a PDF form in Adobe Acrobat and then submit the form values to LaserVault. The values will be saved in the PDF and in the Imaging Database for fields that are named the same (PDF field name = Imaging field name). When a PDF form is display via LaserVault Imaging the field values from the imaging database are re-merged with the PDF. So any changes made to fields in the imaging database will be displayed on the PDF form if the field names match. Form fields that are not in the imaging database are still saved in the PDF.

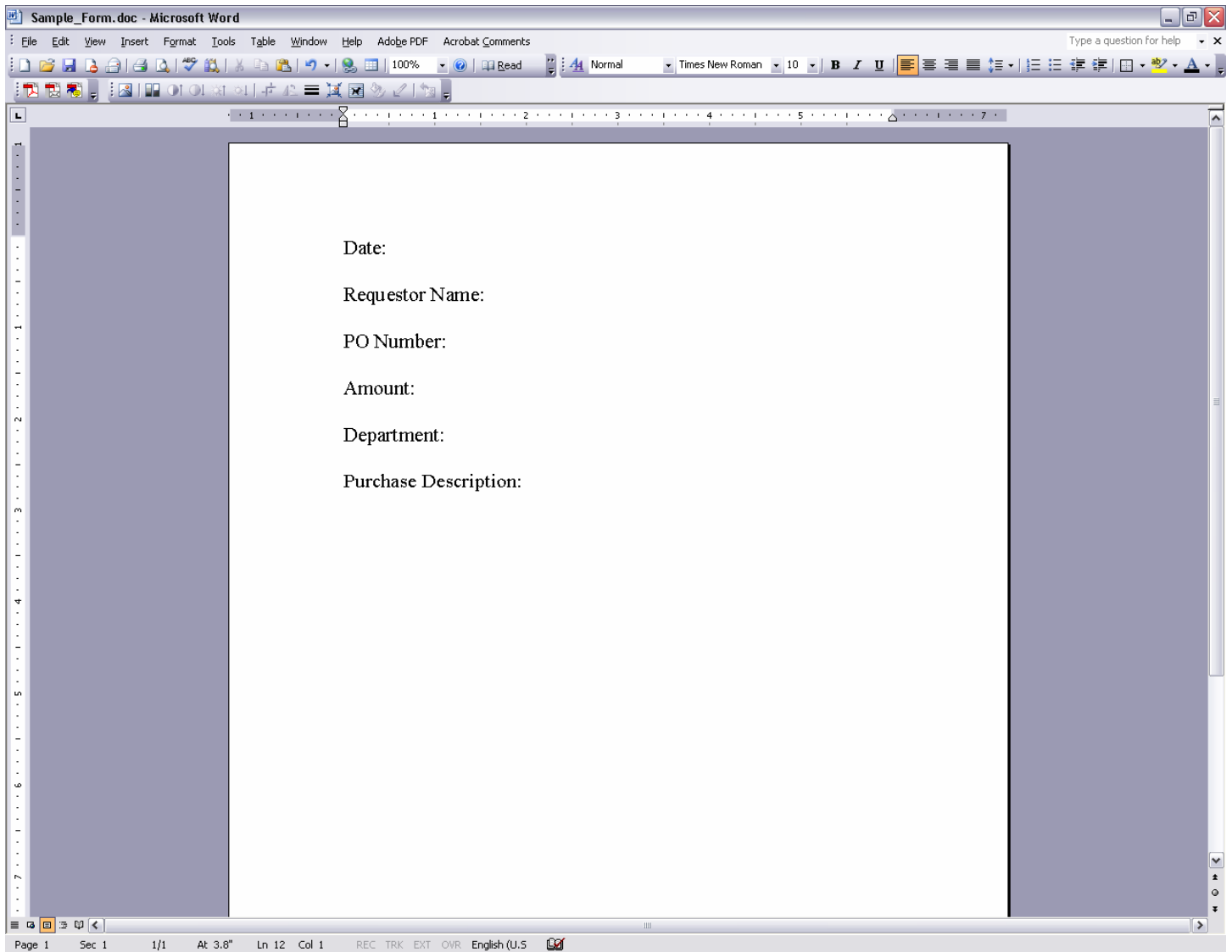
In order to create PDF forms, you need Adobe Acrobat Professional. Version 6 or higher is recommended.

Setting up the PDF Form

Adobe Acrobat it's self is not a document designer. You can't do word processing functions in it like you can do in MS Word.

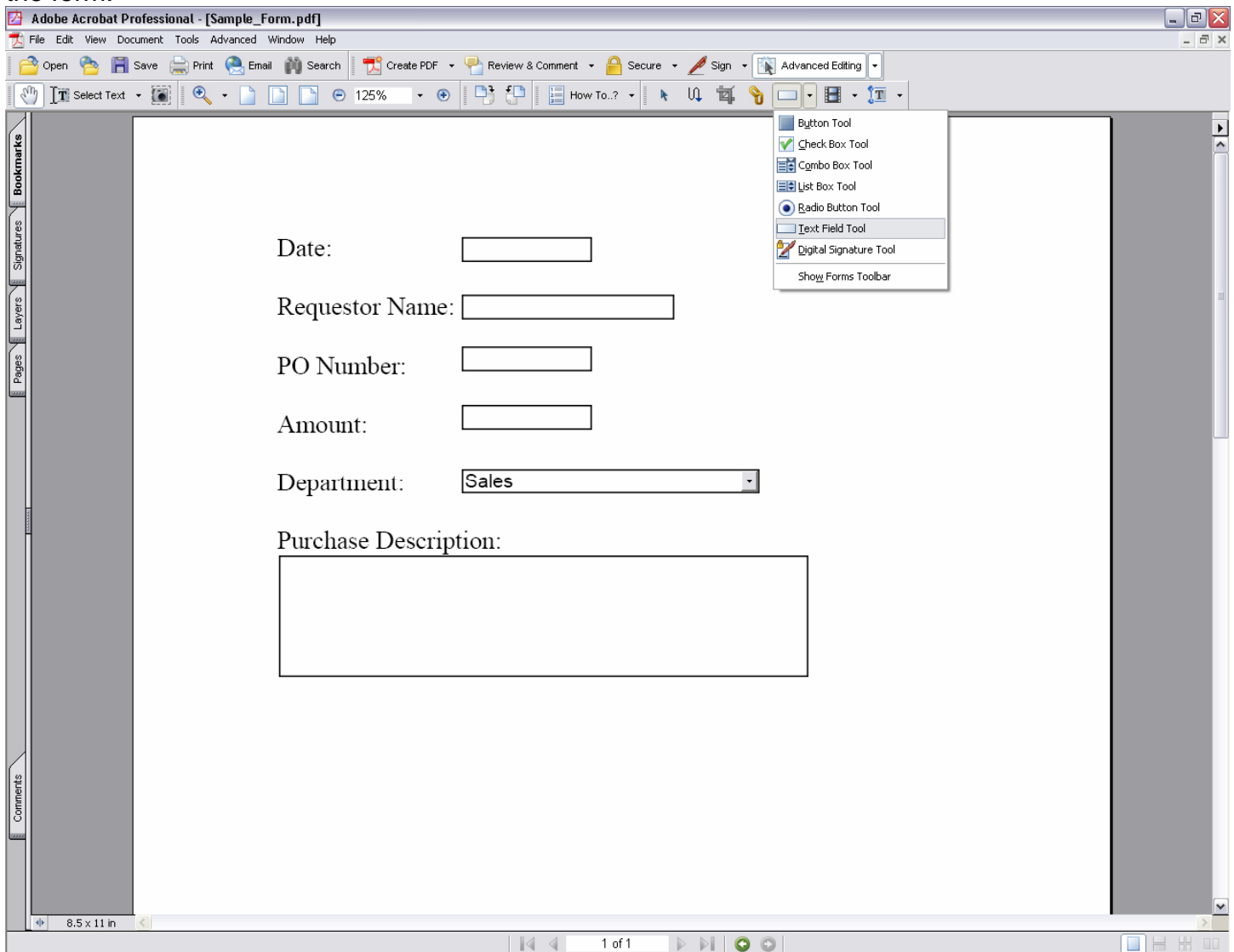
For this reason, it's best to start a form in a word processor like MS Word, and then convert that to a PDF. Then use Adobe Acrobat to add the form fields and the submit button.

We will start by creating a simple document in MS Word and then convert that document to a PDF file.



Use the Acrobat tools to convert the document to a PDF. Open the PDF in Adobe Acrobat Professional and begin adding fields.

Use the forms toolbar or the options under the Tools/Advanced Editing/Forms menu to draw text fields on the form.

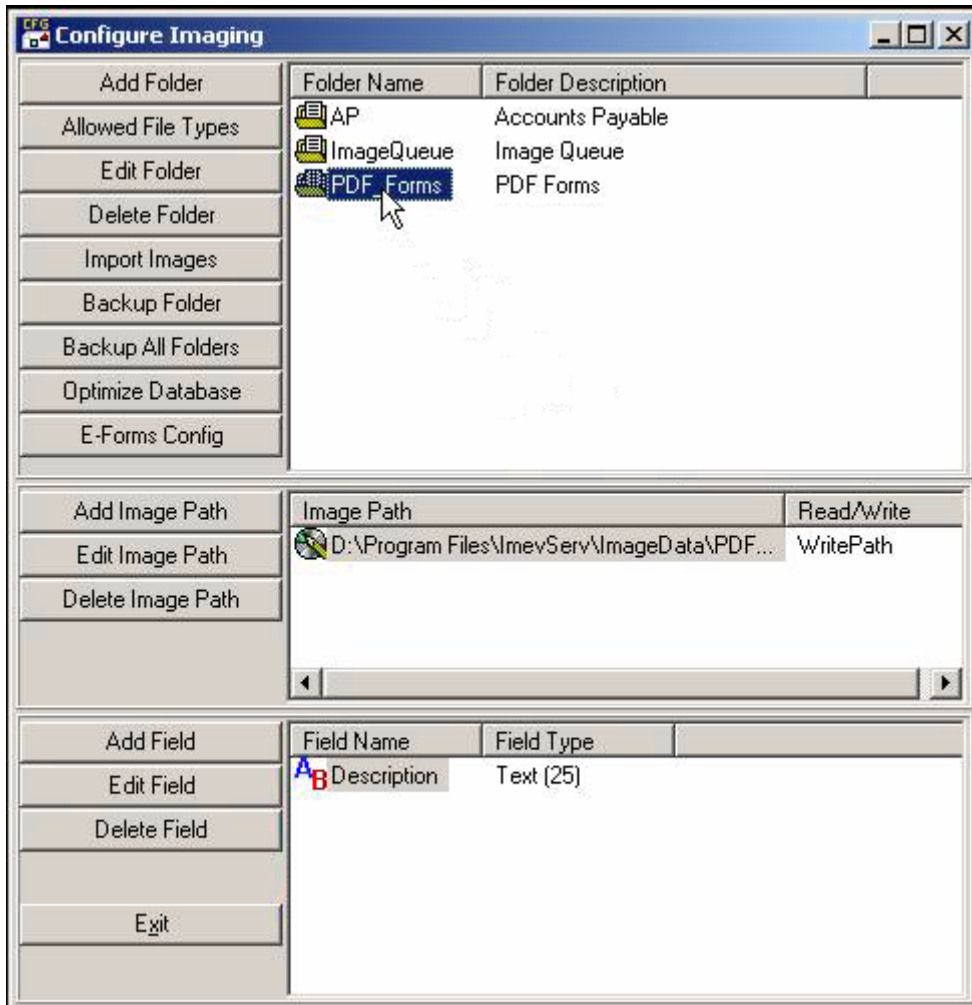


If you already have an imaging folder and fields defined, then be sure to give the PDF form fields the same name for any field you want stored in the imaging database. Any form field that does not match field name in the imaging database will still be stored in the PDF it's self, but not in the imaging database. Save the PDF file once you have the required fields defined. The next step is to create the necessary imaging folders.

Setting up the Imaging Folders

The first thing that we need to do is setup a folder that will hold the blank PDF template form. Think of this folder as a repository for all PDF forms you are going to define. Be sure to uniquely name your PDF files so there is no naming conflict.

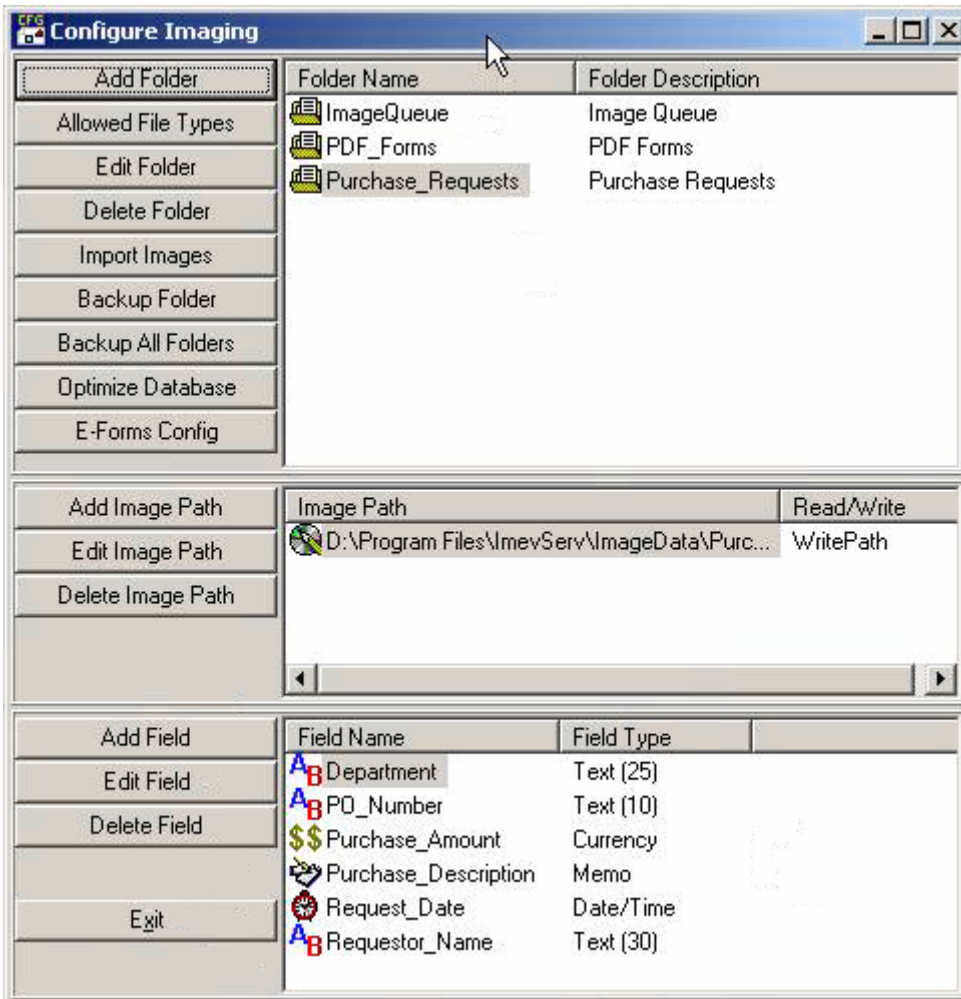
Add a folder to the imaging system called PDF_Forms.



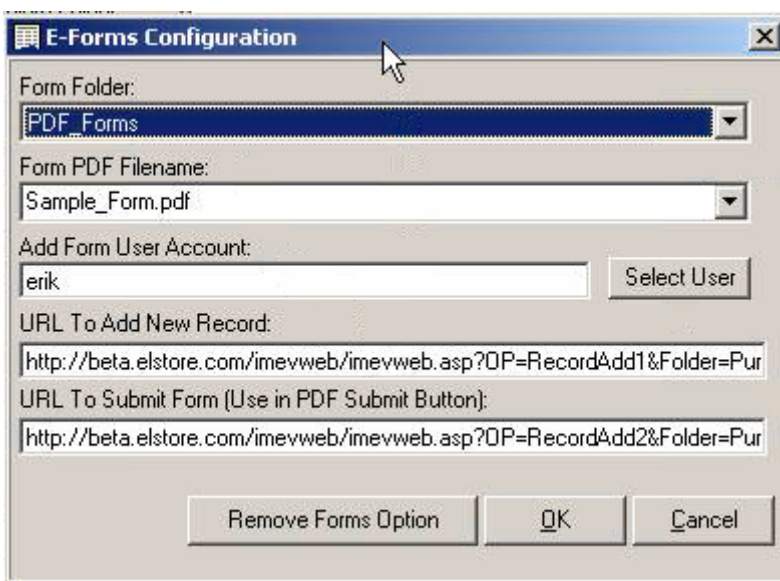
No fields need to be defined in this folder but it may be helpful to add a description field just to help remember what each form is for. Don't forget to add PDF as an allowed file type.

The next step is to upload the PDF form into this folder. You can do this using the LaserVault Web Client or the Windows Scan Station Client. Just add a record and attach the PDF file.

Now that the forms folder is setup the next step is to setup the application folder. We will add the fields we've defined in the PDF form and name them the same.



Once the fields you want stored in the database are defined, click the "E-Forms Config" button to setup the folder for PDF Forms.



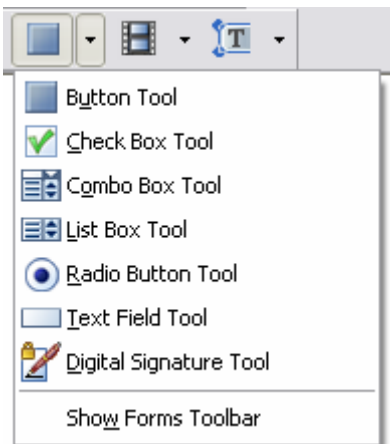
On this screen, select the PDF Forms folder, the PDF form file name, and the user account to use when submitting the form data.

The use account parameter is required, but will be ignored if you have LaserVault Imaging configured for Windows Integrated Authentication. (see the Installation Guide for more information about Windows Integrated Authentication)

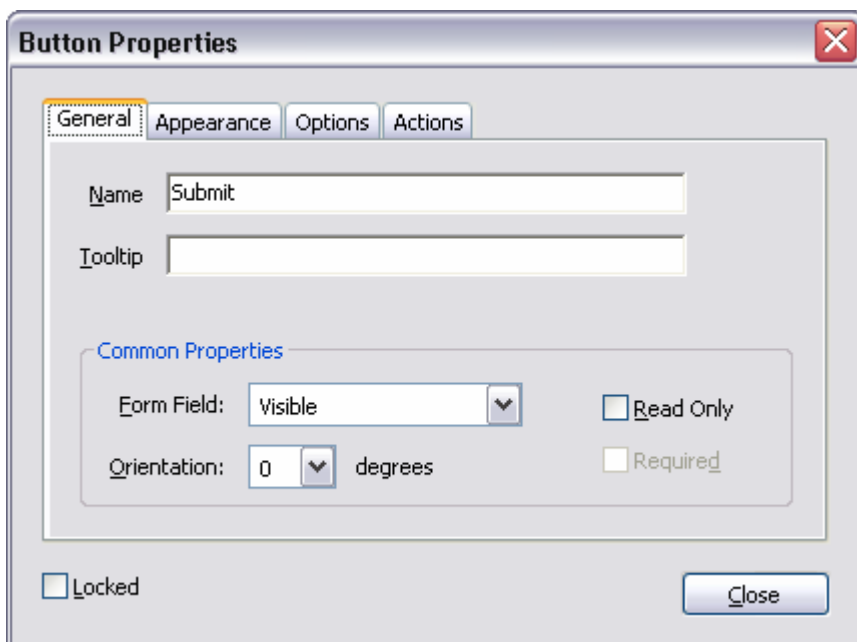
The “URL To Add New Record” is a link that can be used to automatically login to LaserVault Imaging and see the new blank form to fill out. Note that if you are not using Windows Integrated Authentication using this link will cause the end user to be logged in as the account selected. Alternately a user can login to LaserVault Imaging Web with their credentials, select the folder and then click the Add Record button. This will bring up the same blank form to fill out.

The second URL – “URL To Submit Form” is the URL to use in the PDF Form for submitting the field values. Copy this URL to the clip board and then edit the PDF Form and add a submit button as shown below.

First select the button tool and draw a button on the form.

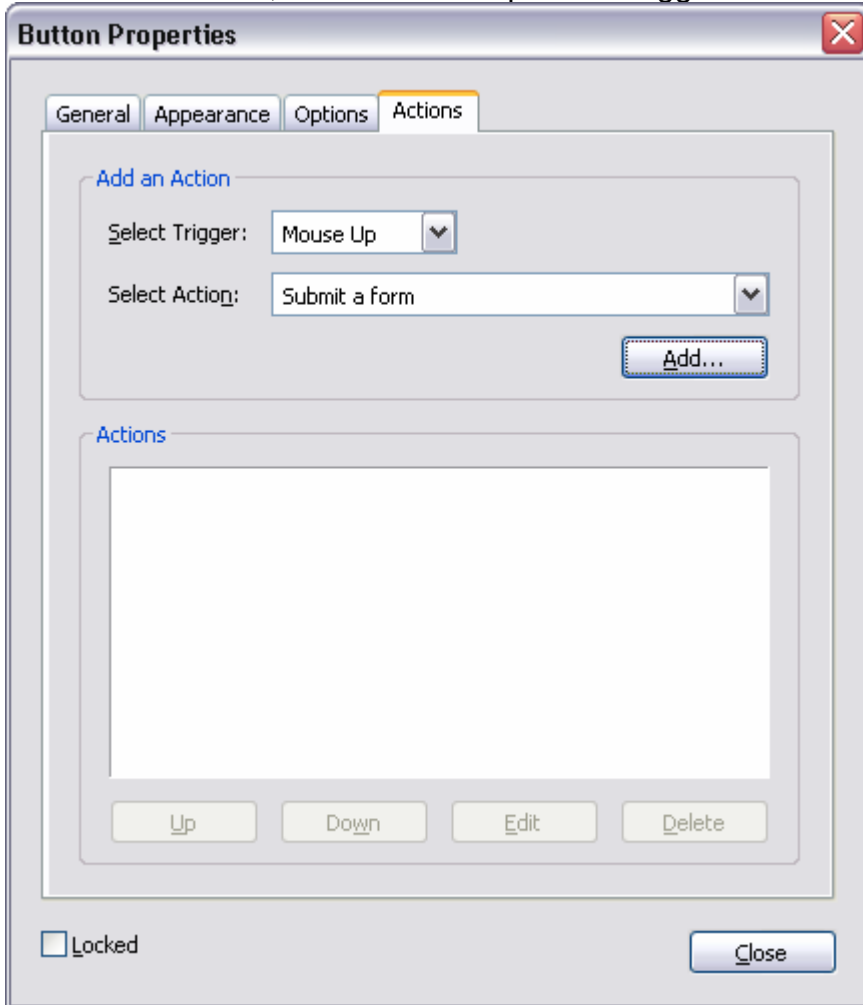


Name the button “Submit”. On the options tab, enter the text to display on the button in the “Label” field.



To make the button look more like a press-able button (3D) set the line style to beveled and the line thickness to medium.

On the Actions tab, select Mouse Up as the trigger and “Submit a Form” as the action.

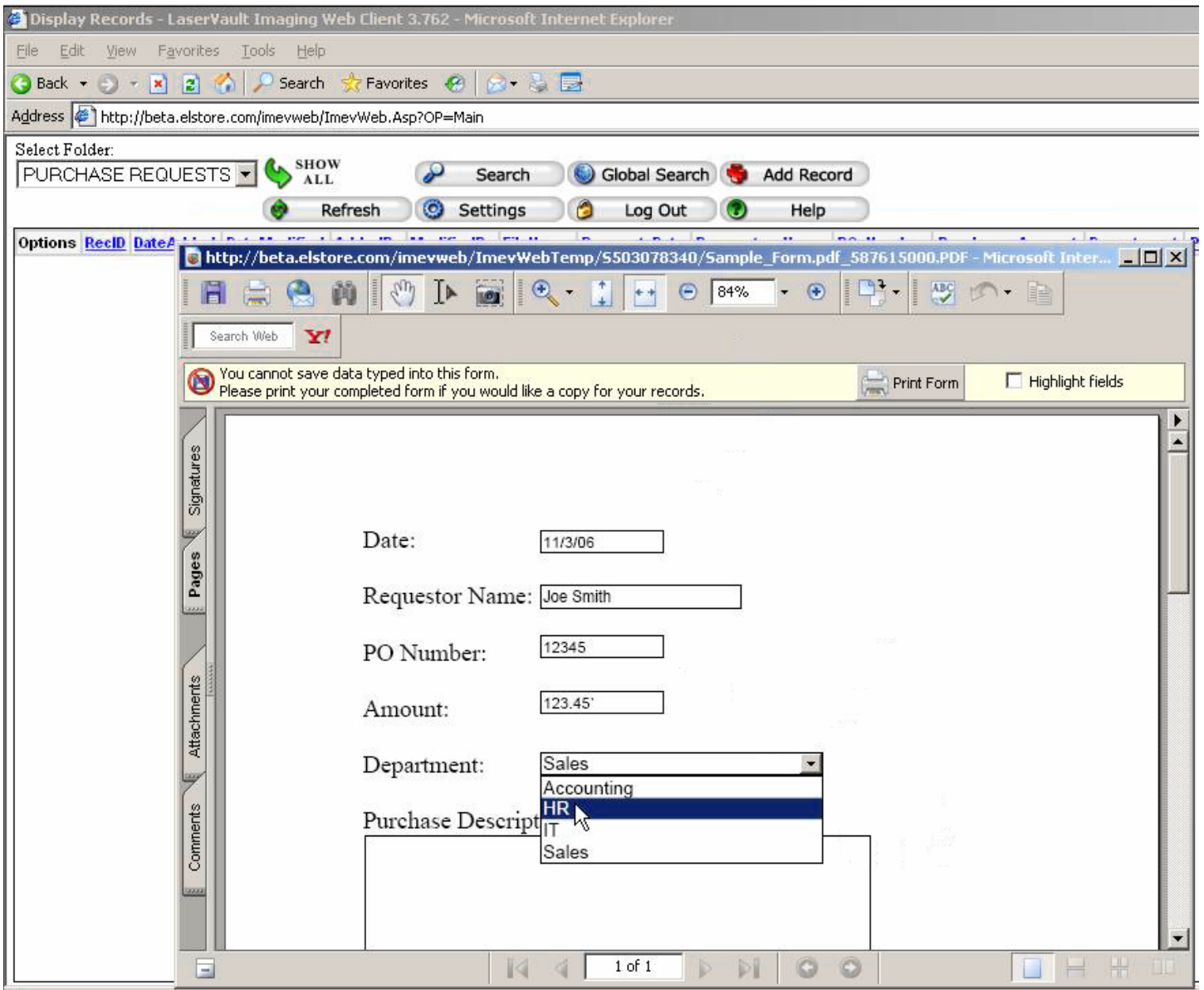


Then click the “Add” button.

In the URL field, paste the URL from the E-Forms configuration dialog in the management console. Select the HTML export format.

Click OK and save the PDF file. Now log back in to imaging and replace the old PDF with this one. We are now ready to test submitting the PDF.

To test the PDF form, log in to LaserVault Imaging Web Client and select the application folder (Purchase Requests) and click the “Add Record” button. This will show the PDF form.



Click the submit button to save the form and then click the show all button to see the record you just added.

You can also put this PDF Form on your internal web site so users don't have to login to imaging to fill it out. This is because the submit URL has the full path to the imaging server with the select user name and password encoded. For those using Windows Integrated Authentication the user/pass in the URL is ignored and the account the user is logged on to the domain with is used. See the Installation Guide for more information about the different security setups for LaserVault Imaging.