

Description of an automatic creation, automatic dispatch and an automatic analysis of PDF forms

Introductory

PDF forms are very important today to collect information from costumers, partners or employees. But it is not so very easy to do so because when you want these people to fill in forms online, save to their locals HD, import and edit again and send back to you, it becomes much more difficult. What is the problem?

User involved:

There are sender and recipients of a form. When we say sender we mean people who create a form and provide this to user. Recipient is a person who receives a form, fills it out and sends back data to sender.

Programs:

To create a PDF form you can use different programs. You may know Adobe Acrobat Professional but there are some other, really competitive solutions like *pdf-Office* to create PDF forms very easily. This program provides several features to create validate and calculate form fields.

The average way to create a form in MS-Word first and convert to PDF (printer driver) in a second step does not work most of the time for this way only creates a PDF document but not a form.

What is the difference between a PDF document and a PDF form?

A PDF document you can only display and print out. It does not contain any interactive form fields, any calculations or validations, any way to select or enter any data. Only if there are fields you can enter with data, select choice boxes or radio buttons we are talking about a form.

To present, enter and print such a form you need special software. In general this is free Acrobat Reader. Unfortunately you can not save data you enter to you local hard drives, because Acrobat Reader does not provide such a feature.

You need some additional software to do so. Another way is to email form data to sender, but he therefore has to take some very special precautions which only experts are able to do.

Formats:

Very important aspects are formats you use. The form itself will be in PDF format. A PDF form you can not change or edit. When you enter data to form fields and save this data – if you have some additional software – this input will be saved as a FDF file.

With this separation PDF forms are still unchangeable but you can enter and save data, import and edit again. And you can process this data later in other programs if you want to.

How can you create and process pdf forms?

We will describe this workflow with an example of UNIVERSE Software solutions.

Step 1 – Creation of a PDF form

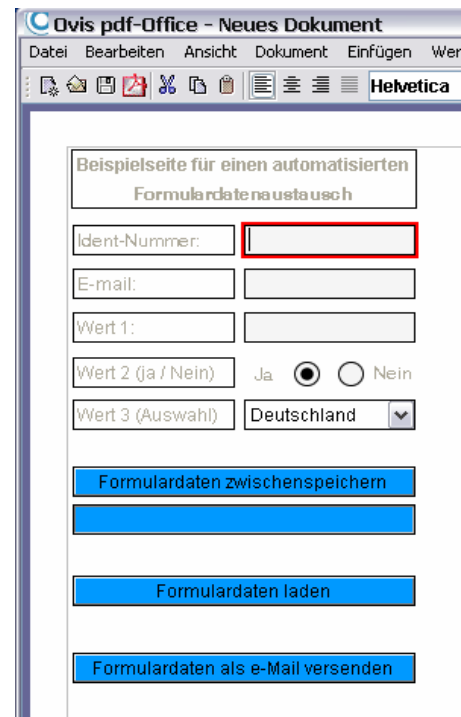
The best way to create a PDF is to use *pdf-Office*. This solution provides you with several features to easily create PDF forms from scratch. Without any training you can choose form fields from a list, define size and properties, validations and calculations, if needed.

In addition to that you can create features to enable users to save these forms with form field content to their local hard drives, or to send form field content via email.

These features are unique for in general you need additional software solutions to do so.

Moreover *pdf-Office* provides a feature to set export values to any pdf form field so that you can process and analyze input later.

A form created in *pdf-Office* and sent to users is the starting point of a workflow you can create. If you want to distribute such a form to a huge number of users, filled with some special input which is customized to users, you have to do the following steps:



The screenshot shows the Ovis pdf-Office interface with a form titled "Beispielseite für einen automatisierten Formulardatenaustausch". The form contains several input fields: "Ident-Nummer:" (highlighted with a red box), "E-mail:", "Wert 1:", "Wert 2 (ja / Nein)" with radio buttons for "Ja" and "Nein", and "Wert 3 (Auswahl)" with a dropdown menu set to "Deutschland". Below the form are three blue buttons: "Formulardaten zwischenspeichern", "Formulardaten laden", and "Formulardaten als e-Mail versenden".

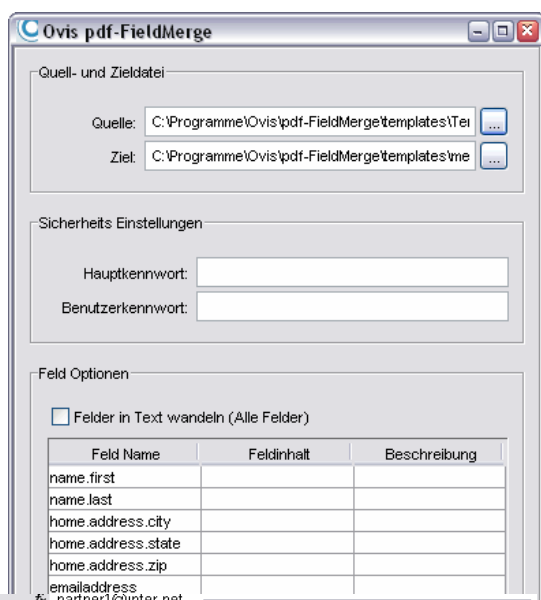
Step 2 – Distribution of customized pdf forms

With *pdf-FieldMerge* you can fill in pdf form fields from a database, without to open a pdf form. This helps when you want to create personalized pdf forms in large numbers.

The easiest way is to fill form fields from an Excel table.

This table contains data which you want to fill in some form fields and send to your customer. You are able to define any form field of your pdf form to be filled. You can even “flatten” these fields you filled in so that user can not edit data anymore. In our example we want to fill in the individual email address to a form fields for an automatic distribution.

From this table you start the automatic filling out of form fields. The program will use the pdf form you created with *pdf-Office* as source file, fill in form field content in accordance with your table and save the new personalized pdf form file or send this to your recipient.



The screenshot shows the Ovis pdf-FieldMerge window. It has three main sections: "Quell- und Zieldatei" with "Quelle" and "Ziel" fields; "Sicherheits Einstellungen" with "Hauptkennwort" and "Benutzerkennwort" fields; and "Feld Optionen" with a checkbox "Felder in Text wandeln (Alle Felder)" and a table of field names and descriptions.

| Feld Name | Feldinhalt | Beschreibung |
|--------------------|------------|--------------|
| name.first | | |
| name.last | | |
| home.address.city | | |
| home.address.state | | |
| home.address.zip | | |
| emailaddress | | |
| partner1@inter.net | | |

Below the main window, there is an Excel spreadsheet titled "umfrage" and a "Select Record" dialog box. The Excel spreadsheet has columns A and B, with rows for "e-Mail Adresse" and "Ident-Nummer". The "Select Record" dialog box shows a list of email addresses: "partner1@inter.net", "partner2@inter.net", and "partner3@inter.net".

Step 3 – Fill out and save pdf forms as recipient

As we said before you can not save pdf form fields with data you're entered to your hard drive, when you do not use an additional solution as **pdf-FormServer**. What you can do is open a form, fill in data and print this form out. You can only save pdf forms to your hard drive but this does not contain data you entered to form fields, so this will always be an empty form.

To save the form with content you need a "save" capability in your form.

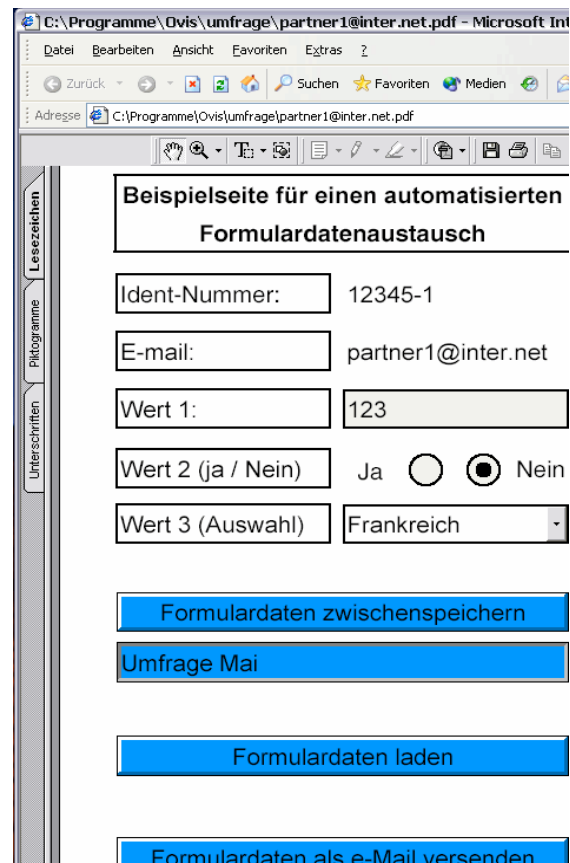
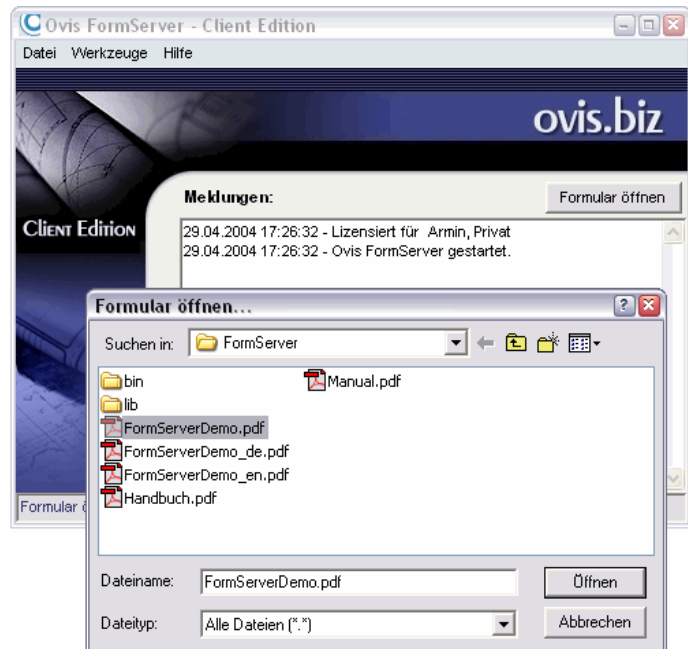
pdf-FormServer provides you with such a feature. And it adds a save capability to any pdf form, if there is no such button. The program runs in background and allows opening pdf forms, to enter content and save this content as a separate file to your local hard drive. You can import data you entered any time and edit and save again.

User can also send data to a special email address. For data is saved to a separate file, a so called FDF-file, both sender and recipient can process these data automatically.

Therefore it's a benefit to only get FDF files without PDF for you only process form field content.

Please have a look at the window at the right; you can see Value2 and Value3. This is a Yes/No query and a choice box. When you set export values as numbers depending on user input you will get exactly this response. User will of course get your text to select but this selection will create an export value which is much easier to process and analyze electronically.

You can see that this is very easy and fast to process.

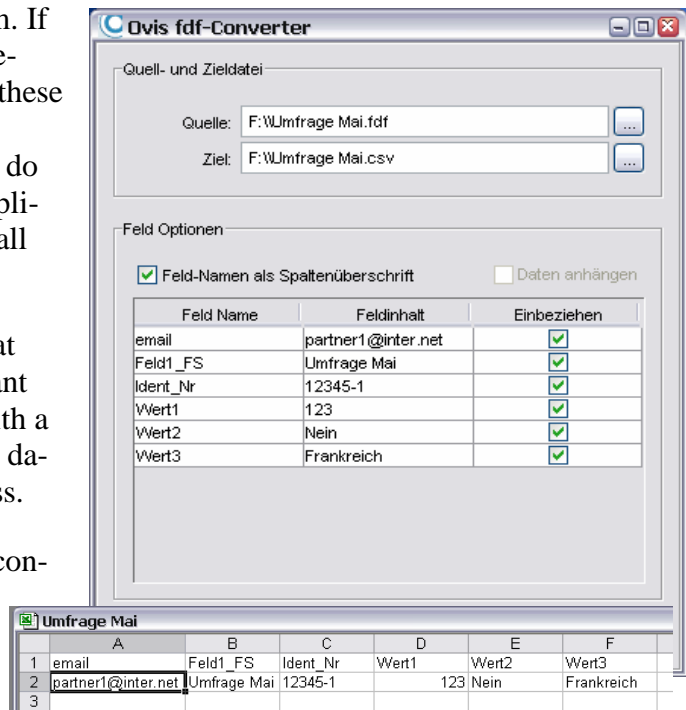


Step 4 – Analysis of fdf files

Each fdf file contains data of one pdf form. If you want to process lots of fdf files you receipt, it makes sense to bring together all these files. The easiest way to do so is to use **fdf-Converter**. With this solution you can do both convert fdf files to a format other applications can process and to bring together all files to one new file.

Another advantage of **fdf-Converter** is that you can also except form fields, if you want to. **fdf-Converter** will create a new file with a CSV extension. This is a format, Excel or databases like Access can import and process.

The program will create one file with all content of your fdf files. This file will create a table in Excel or Access you can sort, edit, change, and analyze or whatever.



We hope we could give a short overview of this workflow to you. As you can see it's rather easy to create a general pdf workflow in order to provide huge numbers of users with this format and process and analyze data very easily.

Some further information you will find on our website www.pdf-Office.com.

If you have some further questions or need some help, please don't hesitate and contact us via email: support@pdf-office.com

The
UNIVERSE Software team

Weitere Produkte



pdf-Office

Create sophisticated PDF forms and PDF documents very easily from scratch.



pdf-FormServer

Save any PDF form with content to your desktop or server.
Available as:

Client-Edition for local user/desktop

Server-Edition for Intranet demands

Web-Edition for Internet demands



pdf-FieldMerge

Edit new field values to your pdf forms. Automatically. Create new, personalized forms. Either in background (with call up from other programs) or with fully graphical control



fdf-Converter

Convert any FDF file to a *.CSV data format and process these data with MS Access or MS Excel. You can even select an unlimited number of fdf files and create one single CSV file.



pdf-DocPro

Set new properties to any existing PDF file.



pdf-Recover

Forgot our PDF master password? No problem!



pdfMachine

Create PDF files from any Windows application.