

Sales and Solicitation Request Form – Documentation

How to Use and Modify the Form

General

For simple modifications regarding textual content and layout rearrangement, editing the PDF will suffice; however, it may be easier to edit the original word document instead (and then create a new PDF from it) for larger changes. The foundation consists of header containing the title with 2 images in each top corner and a one-page body. Please note that users

Original – Word Document

The following will refer to Microsoft Office Word. Please consider showing paragraph marks and other symbol notation that's usually hidden (ctrl + *) to make it easier to see the formatting of the document. Note that line spacing is 1.0 and line spacing before and after paragraphs is removed in most areas, besides the odd exception after a table. The spacing was directly controlled via inserting blank lines of very small font size in order to add appropriate whitespace without pushing the size of the form over to a second page. Invisible tables are used to assist formatting and layout since it nicely bisect the width and create columns. For example, the most notable use is for the "internal" grey 'box' where only the outer border of the table is shown. Note the main topics of fill-in-the-blanks are bolded headers. Note the signature and date underscores in the "internal" section are underlined to make them appear bolded. Note that Name of Affiliated Organizations has a Shift+Enter character after it for spacing and layout reasons within that cell of the invisible table. **Important note:** There are no placeholders for all 5 radio buttons (reservation confirmed x2, letter health inspector x3), one checkbox (copies to HS), and the 'submit' button (which would be center-aligned at the bottom of the document after the last line). Single bullets that look like a white square were used in each cell of the invisible table to be placeholders for checkboxes later (refer to Event Type and Permission Request). Overall, ensure that whitespace is utilized effectively by spacing individual elements and grouping similar areas together so the form is intuitive and does not appear cramped.

Fillable Prepared Form – PDF Document

The following will refer to using Adobe Acrobat Pro DC, which has an Edit mode and Preview mode.

Preparing a New Form

1. Select “More Tools” (wrench with +) from the bottom of the right column of the window that shows multiple common Acrobat tools
2. Search for “Prepare Form”, select “Add” so the shortcut appears in the right column later, then select “Open” (**NOTE:** Remain in “Prepare Form” mode for the remaining steps)
3. Select the original word document as the file – it will then analyze and create text fields and other elements for the majority of the form.
4. Examine the auto-generated form and look at each element’s properties (double-click or right-click → Properties...), checking that the ‘Name’ of each element is unique (exception: radio button groups) and that all ‘Tooltip’s make sense.
5. Fix the text fields for both “Event Description” and “Instructions”
 - a. If multiple text fields appear, delete the additional one and increase the height of the first to encompass both lines
 - b. Select ‘Properties’. In ‘Options’ tab, turn on ‘Multi-line’ and ‘Scroll long text’
6. Add all missing elements to the form manually using the UI at the top underneath the standard toolbar. I.e. add the following as appropriate: text fields, checkboxes, radio buttons (with groups), signature field, date fields, and the ‘Submit’ button. (**NOTE:** See below for details)

Completing the New Form

The following fields must be marked as required (right-click → 'Set as Required Field'): Group Name, Name of Affiliated Organizations, Submission Date, Event Date, Event Location Building and Room Number, Reservation Confirmed?, Event Description, Letter from Health Inspector, at least 1 Item and Supplier, at least 1 responsible individual's Name + Email + Phone.

OPTIONAL: Add a script so that the text fields for Total Value of Sale Items ("If conducting a sale, indicate total value of items to be sold") and Beneficiary Name/Organization ("Who shall benefit financially from these sales?") are conditionally required fields if a checkbox related to a sale is selected. Code similar to the below would be added to each checkbox's properties by navigating to the 'Actions' tab and adding a new action with trigger "Mouse Up" and action "Run a JavaScript". This action can be altered in this same tab by selecting the existing action and clicking the 'Edit' button.

```
// This code would be added to each checkbox that is applicable to a sale -  
in this case, the example is for cbBakeSale. If it was for cbMerchSale, it  
would not have a check for its own value and instead cbBakeSale.
```

```
// As the first checkbox of the group relating to sales is selected, the two  
text fields become required. Also, when the last one is unchecked, the text  
fields no longer become required.
```

```
if(this.getField("cbMerchSale").value != "Yes" &&  
this.getField("cbTicketSale").value != "Yes" &&  
this.getField("cbConductSale").value != "Yes" &&  
this.getField("cbSellDistributeFood").value != "Yes") {  
    this.getField("Total Value of Sale Items").required =  
event.target.value!="Off";  
    this.getField("Beneficiary Name/Organization").required =  
event.target.value!="Off";  
}
```

After setting the required fields, look to complete the “For Internal Purposes Only” section, which pertains of a signature field, date field, multi-line text field (for Instructions), and one checkbox (for Copies to HS). This section is not filled out by the user and thus not required for the form. **NOTE:** the ‘Date Field’ type is actually just a normal text field with modified format. In the ‘Format’ tab of a text field’s properties, select “Date” as the ‘format category’. **NOTE:** For all dates, select ‘dd-mmm-yyyy’ (ex. 06-Jul-2020) as the format from the list of available options.

After the “internal” section and ‘Submit’ button are finished, look back to the top of the form and go from there. Make sure the Submission Date and Event Date are properly formatted as date fields. For “Reservation Confirmed”, make sure there are two radio buttons (Yes, No) in a required button group. Do the same again for “If food is involved, Letter from Health Inspector?” required button group (Yes, No, N/A). After, double-check that Event Type checkboxes and a text field for “Other” are present, along with a multi-line text field for Event Description. Do the same again for Permission Request, but excluding a description field. **NOTE:** Remember to add the following to both Event Type’s and Permission Request’s “Other” checkboxes, respectively. Add a “Run a JavaScript” action with trigger “Mouse Up” with the following code so that the related text field becomes required when selected:

```
// NOTE: this.getField("text-field-name-goes-here")
this.getField("Event - Other").required = event.target.value!="Off";
this.getField("Request - Other").required = event.target.value!="Off";
```

Now, create a script for each ‘required’ group of checkboxes. This can be done for both Event Type and Permission Request checkbox groups by adding an invisible required text field (i.e via right-click, Set as Required Field) and scripting the value calculation. To do this, add a text field directly on top of each header (Event Type and Permission Request), making each invisible using the “General” tab in properties and changing the “Form Field” dropdown in the “Common Properties” panel at the bottom to ‘Hidden’. (**NOTE:** A hidden text field won’t show up in ‘Preview’ mode, but can still be seen normally in ‘Edit’ mode.) The text fields added will be required fields that have their value (i.e. their text body) updated using a calculation script that verifies at least one checkbox is selected from the group, thus meeting the “required” property of the field (because it has been populated via script). To add this script, navigate to the “Calculate” tab in properties of the text field placed over the Event Type header and select “Custom calculation script” and click the “Edit...” button. Add the following code:

// If one event type checkbox is selected, this hidden required text field will be filled with a placeholder (1) to satisfy being 'required'

```
if (this.getField("cbBakeSale").value == "Yes" ||
this.getField("cbMerchSale").value == "Yes" ||
this.getField("cbTicketSale").value == "Yes" ||
this.getField("cbPromoDisplay").value == "Yes" ||
this.getField("cbEventOther").value == "Yes") {
    this.getField("txtEventTypeGroupCB").value = 1;
} else {
    this.getField("txtEventTypeGroupCB").value = "";
}
```

Then, do the same for the text field placed over the Permission Request header, adding the following code:

// If one permission request checkbox is selected, this hidden required text field will be filled with a placeholder (1) to satisfy being 'required'

```
if (this.getField("cbConductSale").value == "Yes" ||
this.getField("cbSellDistributeFood").value == "Yes" ||
this.getField("cbDistributeMaterial").value == "Yes" ||
this.getField("cbErectDisplay").value == "Yes" ||
this.getField("cbRequestOther").value == "Yes") {
    this.getField("txtPermReqGroupCB").value = 1;
} else {
    this.getField("txtPermReqGroupCB").value = "";
}
```

NOTE: For the above code, the field name in the if-else block represents the name of the hidden, required text field.

NOTE: Here, all the checkbox names used originally are present, so someone new could reuse them if desired.

Lastly, finalize the 'Submit' button. In its properties' Action tab, add a new action "Run a JavaScript" with trigger "Mouse Up". The code added here will first verify both checkbox groups (Event Type and Permission Request) have at least one checkbox selected. Then, using the `submitForm()` function, all required fields in the document are checked to make sure they have been filled. If any of these verifications fail, the form is not submitted and appropriate alerts (up to 3) are displayed. When successful, it will auto-generate an email to send to 'spevent@uoguelph.ca', including an email subject and body message (see code below). Add the code below to the action: **NOTE: Also make this button hidden (boss wants it this way for now, may change in future and use it again)**

```
// Custom submit button - verifies all required fields using this method in
order to account for minimum 1 required checkbox for 2 different groups
(event type, permission request)

// event type checkbox group verification
var eventGroupCB = this.getField("txtEventTypeGroupCB").value;
if (eventGroupCB == 1) {
    this.getField("txtEventTypeGroupCB").display = display.hidden;
} else {
    app.alert("Please select at least one event type.");
}

// permission request checkbox group verification
var permGroupCB = this.getField("txtPermReqGroupCB").value;
if (permGroupCB == 1) {
    this.getField("txtPermReqGroupCB").display = display.hidden;
} else {
    app.alert("Please select at least one permission request.");
}

this.submitForm({
```

```
cURL: "mailto:spevent@uoguelph.ca" + "?" + "&subject=Form Returned: Sales  
and Solicitation Request Form.pdf" + "&body=The attached file is the filled-  
out form. Please open it to review the data.",  
cSubmitAs: "PDF"  
});
```

NOTE: *submitForm()* parameter *cURL* has format “mailto: [email]?&subject=[text]&body=[text], and *cSubmitAs* PDF specifies that the entire PDF form will be sent as the attachment of the email. CC and BCC can also be added here.

NOTE: The auto-generated email will be sent using the computer’s default mailing system. If one has not been setup yet, very simple and easy-to-follow prompts are provided to set one up. In an absolute worst case scenario, someone will print off the form and fill it in by hand and send it in after. In a less worse scenario, the user fills the form out in an unsupported PDF viewer (i.e. not Adobe Acrobat or similar, instead using browser PDF viewer or another application without interactive support for the PDF elements and scripts being used here), realizes submitting the form doesn’t work when using the button, so they save the filled PDF and send an email themselves with it attached. Keep in mind that functions such as required fields and date field formatting won’t be present in this case, but the date format the user provides can be determined by the receiver since the user also provides the current day’s date (via submission date field).

In summary, all the text fields, date fields, checkboxes, radio buttons (with groups), and one signature field should all be present, properly modified with the correct format and actions. These elements all connect to the ‘Submit’ button using required field properties in order to submit and send an email with a complete PDF copy of the filled out form to the designated email address. The latter we have scripted ourselves in order to display appropriate alerts to the user when the checkbox groups requirements are not met because we used hidden required fields to accomplish this.