

## FORMATION NOTES

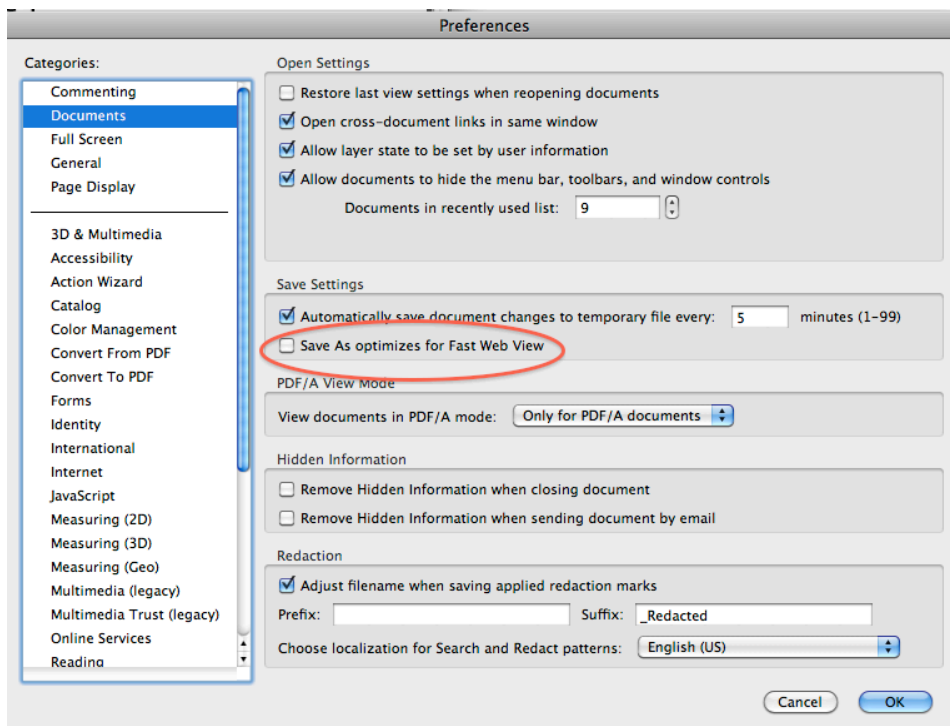
### APPLICATION SUMMARY

FORMATION is an iPad application designed to expedite the process of completing PDF forms where redundant information is shared amongst multiple different forms. Formation uses PDF forms documents.

Formation is not intended to be a full feature PDF reader. For large documents or for complex annotations, please consider another product.

### CREATING FORMS AND DELIVERING FORMS

Forms need to be created off-line with a PDF form editing tool such as Adobe Acrobat. Formation only accepts forms that have NOT been optimized for WEB streaming (also called Linearized PDF files). When creating forms, make sure you turn **OFF** this feature.



When using Acrobat to define the interactive form elements, one needs to consider which fields are to be replicated across forms and name those elements the same. Form elements that are not to be replicated should have unique names.

In the examples included with this app, sampleForm1.PDF, sampleForm2.PDF and interactiveform\_enabled.pdf each have multiple form fields that share the same names. The last name for example is labeled Name\_Last in each of the forms. When that field in one form is completed, the fields in the other forms that have the same name are replicated.

Below is sampleForm1 in edit mode.

The screenshot shows a PDF editor window titled "sampleForm1.pdf". The main area displays "Sample Form Template 1" with the following fields:

- Last Name:  First Name:  Middle Initial:
- Street Address:
- City:  State:  Zipcode:
- Home Phone:  Male: ☐ Female: ☐
- Email Address:

The bottom right corner features the "Rabbit Hill SOLUTIONS" logo. On the right side, a "Forms" panel is visible with the following sections:

- Tasks**
  - Add New Field
  - Distribute
  - Track
  - Close Form Editing
  - Other Tasks
- Fields** (Other forms tasks)
  - Sort By
  - Tab Order
- Page 1**
  - Name\_Last
  - Name\_First
  - Name\_Middle
  - Address\_1
  - ZIP
  - Telephone\_Home
  - STATE
  - City
  - SEX
  - EMAIL

PDF files are sent to Formation and extracted from Formation using email. When you receive an email on the iPad with a PDF attachment, Formation will be one of the apps to open it.

## APPLICATION ROADMAP

Formation has two major tabs: Portfolios (Green) and Folders (Blue). Touching the tabs at the bottom allow you to switch between them. Portfolios are where blank forms are kept and organized and Folders are where completed forms are saved. Folders can have sub-Folders.

PDFs can be treated as individual forms or as a portfolio of forms. Individual forms can be edited and stored separately. Forms that are part of a portfolio share their fields with other forms within that portfolio.

All new blank forms are stored in the folder “All Blank Forms” on the portfolio page.

Users can create and delete portfolios and copy a subset of forms from “All Blank Forms” to a newly created portfolio.

Tapping a form opens it up for editing. Pressing and holding a form will allow you to drag a copy to a folder or portfolio.

Folders and Portfolios can be deleted by swiping them in the list on the left. Files and portfolios on the right can be multiply selected and deleted or emailed.

## TUTORIAL

The application comes with this file and four forms in “All Blank Forms”.

- 1) Start by opening up and editing a form. Touch sampleForm1.pdf. This will load the pdf editor and allow you to enter fields. When you are done you can either save the file or cancel. When saving files, you can NEVER save on top of the original file in “All Blank Forms”. Instead, Formation will take you to the Folders tab (blue) and ask you to save the file there. You may create folders and sub folders before you save the file. The file is saved by pressing the **Save** button at the top.
- 2) Once the file has been saved, you can then edit it and save it back out to the same place. Try it.
- 3) Once the file has been saved, you can then go back to the Portfolios (Green) tab and the bottom of the screen. Do that and create a new portfolio by pressing the “+” sign to the right of the “Portfolios” header. Type in the name of the new portfolio and press **done**. This will create a blank portfolio. To delete this portfolio (and anything in it) swipe from right to left and the “Delete” button will show.
- 4) Drag “SampleForm1.pdf, sampleForm2.pdf and interactiveform\_enabled.pdf into the newly created portfolio. This is done by touching and holding the file until a duplicate is created and then drag it over to the portfolio.

- 5) Select the newly created portfolio and open up sampleForm1.pdf. Edit the fields in this form. When you are ready, hit **Save**.

This is where the magic takes place

When this file is saved, you will be asked again for a destination folder and to hit save. Unlike Step 1, rather than save a copy of just this file, a new portfolio is created in the destination folder, the newly edited file is saved in that portfolio as are all of the other files from the original file. **And in the process:** each of the other forms that has fields with identical field names as the edited form will be populated with that field.

So in this example, a new portfolio will be created, sampleForm1.pdf, sampleForm2.pdf and interactiveform\_enabled.pdf will be placed in the new portfolio. And all of the fields from sampleForm1.pdf that can be replicated into the other two forms will be.

If you open up one of the other files in the new portfolio, you will see the fields have been populated.

- 6) If you later decide to edit one of the forms within a saved portfolio, you will be asked if the fields should be replicated for the other forms again or not.

## Navigation

Some basics about navigating the files and folders.

You can switch between Folders and Portfolios using the tab at the bottom of the screen.

Left side: selecting a folder or a portfolio will show what's in that folder/portfolio on the right.

Right Side: selected a file will open it up for editing. Complex forms may take a little while to open. Touching a folder or a portfolio will drill down into that folder/portfolio.

Folders tab right side: Pressing the select key will allow you to highlight or unhighlight elements in that folder/portfolio. Selected files can then be deleted or emailed out.