

Perceptive TransForm Design Form Getting Started Guide

Overview

TransForm provides the capability to create a new form from scratch, as well as import an existing Adobe PDF form into the TransForm Designer application, allowing for quick, easy, and rapid electronic form conversion. This guide covers the primary steps necessary to build a basic form that is ready for publishing into TransForm E-Forms Manager. This is not an in-depth tutorial covering all aspects and steps of designing forms. For more detailed instructions, refer to the Designer Online Help or the TransForm Basic & Advanced Training.

Build a basic form

In some cases, due to the various Adobe PDF formats and types available, TransForm Designer is not able to convert and import the electronic form automatically. In these cases, the steps contained in a separate *Perceptive TransForm Designer PDF Import Conversion Guide* detail the alternate procedure necessary to prepare the PDF document for TransForm import.

1. Open TransForm Designer. By default, the Default Catalog is loaded.
2. If you are creating the form from scratch, complete the following substeps.
 1. Click **File > New**.
 2. Continue to step 5.
3. If you are importing a form from an existing PDF format, complete the following substeps.
 1. Click **File > Import > PDF**.
 2. Browse to your existing PDF document and click **OK**.
 3. Type **0** for **Page Number** to import all pages, select **Combine adjacent strings** and select **Import large background objects**.

Note You can adjust these settings to optimize your import process.
 4. If you receive an error message such as **File Format Unrecognized**, refer to the *Perceptive TransForm Designer PDF Import Conversion Guide* for more information on how to pre-convert your PDF form into a recognizable format required by TransForm.

Note If the PDF does not import properly, you may need to make adjustments within Designer before continuing.
4. Create a text field, name it **EmailAddress** and label it **Email Address**.
 1. Click the **EditBox** icon from the toolbar.
 2. Holding down the left mouse button, *draw* your text box to an initial size.
 3. Click the text box you created.
 4. From the **Property Sheet** area, under **FieldCode** property, enter **EmailAddress**.
 5. In the property **Label**, enter **Email Address**.
 6. In the property **Bubble Tip**, enter **Please enter Email Address**.
 7. In the property area, click the **Field** tab and click property **Validation**.
 8. Click the **Mandatory** button and click the **OK** button to make this field required.

9. In the property **ValidationMsg**, enter **Please Enter Email address** to set this display message when it does not pass validation.
10. To change the font, font size and font properties, select the form field and use the formatting toolbar.
11. Click the **Text** icon from the toolbar.
12. Holding down the left mouse button, *draw* your text box to your initial size.
13. Click the text box you created.
14. From the **Property Sheet** area, under **FieldCode** property, enter **label_EmailAddress**.
15. Click the object, select the **Text1** label value and enter **Email Address:**.
16. Change the text alignment to right alignment and move the label object in front of the **Email Address** entry field.
5. From the **Default Catalog**, select the **Print** object and then drag and place the object on the form.
6. From the **Default Catalog**, select the **Attachment** object and then drag and place the object on the form.
7. From the **Default Catalog**, select the **Submit** object and then drag and place the object on the form.
8. If you want to see how the form looks from the menu bar, click **Layout > Run Preview**.
9. Click **File > Close**.
10. On menu bar, click **Form > Attachments**, and click **Has Attachments**.
11. From the menu bar, click **File > Save**.
12. Double-click the **Submit** button.
13. From the menu bar, select **Form > Lock**.
14. From the drop-down, select **Formatta Encryption**.
15. Click **Lock**.
16. Enter a password and confirm it matches.
Note You need this password to access the form within TransForm Designer.
17. Click **OK**.
18. To save the form, from the menu bar, click **File > Save**.
19. To close TransForm Designer, from the menu bar, click **File > Close**.

The form is ready to publish in TransForm E-Forms Manager. For more information, refer to the *Perceptive TransForm Publish Form Getting Started Guide*.