

**Banner Document Management
(BDM)**

How to Create PDFs for BDM

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1. Overview

Portable Document Format (PDF) is a supported file format for use with BDM and the AppXtender product suite. WebXtender, the web based AppXtender tool for document management, can be configured to make use of Adobe Reader as an embedded document viewer or to make use of the Adobe Web Access Component if installed. In both cases, the document being viewed will open for display, providing the user features to interact with the document.

There are many tools on the market that allow for the creation of PDF documents. The two most common are Adobe Acrobat Pro and Adobe LiveCycle Designer. Both allow authors to create PDFs with a variety of characteristics and control. However, there are considerations to be aware of when creating PDFs for use in BDM with these and other tools. Limitations exist within WebXtender that can impact whether the PDF can be properly viewed or not.

This document is focused on how PDF documents should be created for use within BDM and WebXtender. It looks at the guidelines for creating a PDF document and the document properties, or characteristics, to avoid when creating the PDF.

Notes:

- These guidelines have been written based on LiveCycle Designer ES3 v10.0.2, Adobe Acrobat Pro X and MS Word 2010. Other versions of these software tools may have slightly different methods than those provided in this document.
- As with most software products there are multiple methods available to carry out an action. In this document we limited instructions and steps to as few options as possible so as to avoid any confusion.
- FGPA has adopted a PDF only standard for all Graduate Admissions documents in BDM starting with the 2014 admission cycle. This standard stipulates that only PDF or PDF/A (an archive format PDF) are the acceptable document formats for indexing into BDM.

2. PDF Creation Guidelines

When creating PDFs for storage and management in BDM the author needs to adhere to several basic guidelines:

1. You need to ensure that the PDF will be able to be opened and viewed in BDM.
2. If the PDF contains a fillable form you need to ensure that the form can be completed and the PDF saved within Adobe Reader – i.e. the PDF must be Reader Enabled.
3. If the PDF contains a fillable form you need to ensure that the PDF is kept as simple as possible and that all fillable fields provide adequate data entry space – i.e. the fields cannot be dynamic
4. If you are following a PDF only standard then you need to ensure that all scanned paper documents are scanned to PDF and all electronic documents are converted to PDF.

2.1 Guideline #1 – Ensuring PDFs can be Opened and Viewed in BDM

WebXtender has limitations on viewing some PDF documents. These limitations are based on how the PDF was saved (i.e. the save as type) and the security within the PDF. It is important that PDF documents that are going to be indexed in BDM are saved following these guidelines.

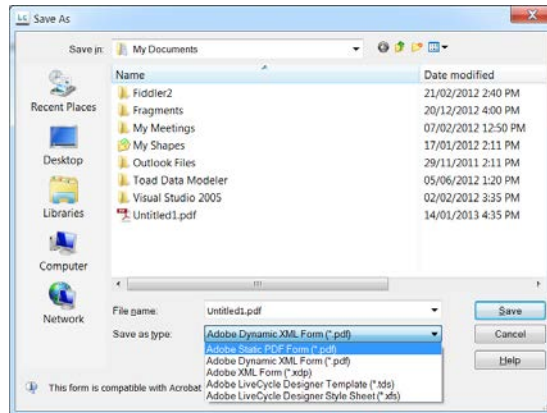
PDF “Save As” Guidelines

LiveCycle Designer

Once the PDF has been created in LiveCycle Designer, these guidelines need to be followed to ensure that the PDF is viewable in our implementation of BDM. These guidelines pertain to all PDFs, regardless of whether they contain fillable forms or not.

- Save the PDF as type **Adobe Static PDF Form**. Do **not** save as the default type Adobe Dynamic XML Form.

- You will be required to change the “Save as type” option when saving the PDF



Adobe Acrobat Pro

Once the PDF has been created in Adobe Acrobat Pro, these guidelines need to be followed to ensure that the PDF is viewable in our implementation of BDM. These guidelines pertain to all PDFs, regardless of whether they contain fillable forms or not.

- Save the PDF as the default type **Adobe PDF Files** if the PDF does not need to be reader enabled (i.e. it is a text only PDF and contains no fillable forms)
- Save the PDF as **Acrobat PDF Files** if the PDF contains fillable forms and needs to allow the PDF to have data entered and saved in Adobe Reader. This type will be the default when reader enabling the PDF. For more info refer to the section on “Making PDF Forms Reader Enabled” further on in this document.

MS Word 2010

MS Word 2010 provides users the ability to create documents and save them as PDF/A formatted files. PDF/A files are in fact PDFs but in an archive format. One limitation of PDF/A to be aware of is that it will not support fillable form content. A PDF/A, once created and saved, cannot be opened and edited in any way in Adobe Reader.

- Open or create a Word document in MS Word 2010
- Using the “Save As” feature save the document as type “PDF (*.pdf)” by selecting it from the “Save As Type” pick list on the Save As screen

Notes for “Save As” Guidelines:

- Because PDFs that contain fillable form content must not be saved as dynamic it is critical that you analyze the form field size and the question it is being used to answer and size the form field appropriately. The form field will not be able to expand when saved in keeping with these guidelines therefore you must ensure

that you provide enough space. Refer to the section on “Ensuring PDFs are Created Simple” further on in this document.

- Saving the PDF in any format other than the ones provided in these guidelines can result in BDM not being able to properly recognize the document as PDF and therefore not be able to properly display it for viewing.
- The inability to view a PDF that does not follow these “Save As” guidelines will exist in both WebXtender and SSB.
- Typically the user will be presented with the following display in WebXtender, or one similar in SSB:



PDF “Security” Guidelines

Secured PDFs become problematic when viewing in BDM. AppXtender provides for two modes – Interactive Client mode and Thin Client mode. The thin client mode has limitations when trying to view secured PDFs, essentially the thin client **cannot** open secured PDFs. The interactive client mode does not have these limitations.

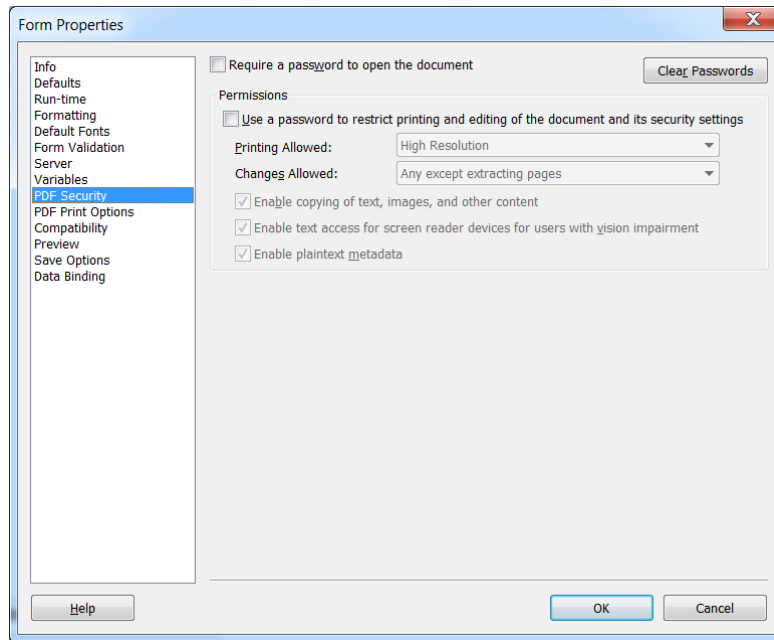
For maximum efficiency and user experience it is recommended to not secure PDFs that are being used in BDM.

LiveCycle Designer

When creating PDFs in LiveCycle Designer the author has the ability to access “Form Properties” to set security on the PDF. This should be avoided.

- Click File -> Form Properties
- Select PDF Security in the left margin list of options
- You will see two checkboxes

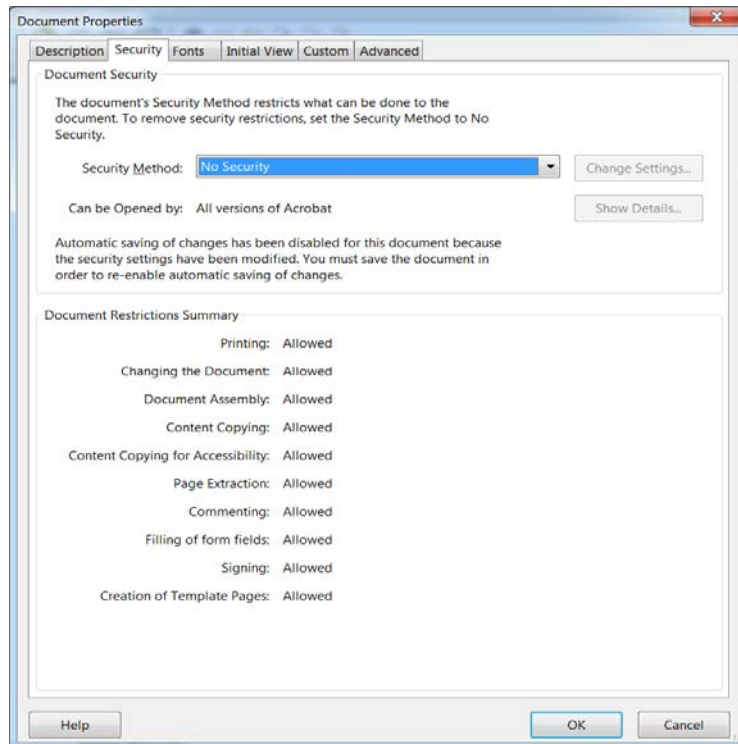
- Require a password to open the document
- Use a password to restrict printing and editing of the document and its security settings
- Ensure both checkboxes are left unchecked...this will ensure that security is **not** being applied to the PDF.



Adobe Acrobat Pro

When creating PDFs in Acrobat Pro the author has the ability to access “Document Properties” to set security on the PDF. This should be avoided.

- Click File -> Properties or right click on the PDF and select Document Properties from the pop-up menu
- On the properties window select the Security tab
- On the security tab ensure that the **Security Method** field is set to “No Security”



MS Word 2010

Because MS Word 2010 provides only the ability to save as PDF/A, we do not have to worry about security settings. PDF/A by default are unsecured.

2.2 Guideline #2 – Making PDF Forms Reader Enabled

Reader enabling a PDF form simply means that the end user will be able to open the PDF in Adobe Reader, complete the form items on the PDF and save the PDF with the data retained. Making PDF forms reader enabled has no impact on the ability of that PDF to be viewed in BDM. However, when reader enabling PDF forms, they need to be saved. How they are saved will have an impact.

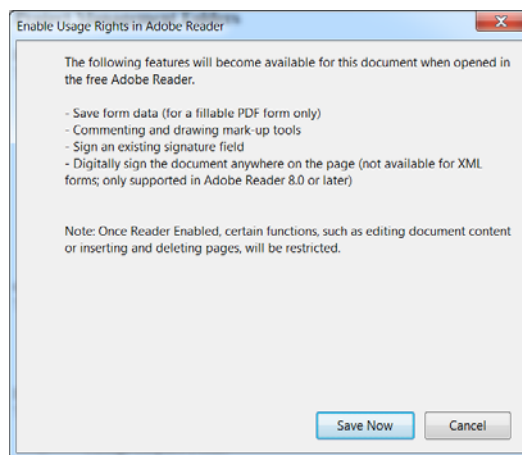
By default, LiveCycle Designer cannot create reader enabled PDFs. It will allow the author to create Fillable Forms but those forms cannot be completed and saved in Adobe Reader. To reader enable PDF forms in LiveCycle the Reader Extensions module must be purchased and installed.

PDF forms created in Adobe Acrobat Pro can be reader enabled. Acrobat Pro 8 and higher provides the feature to reader enable PDF forms without adding the reader extensions.

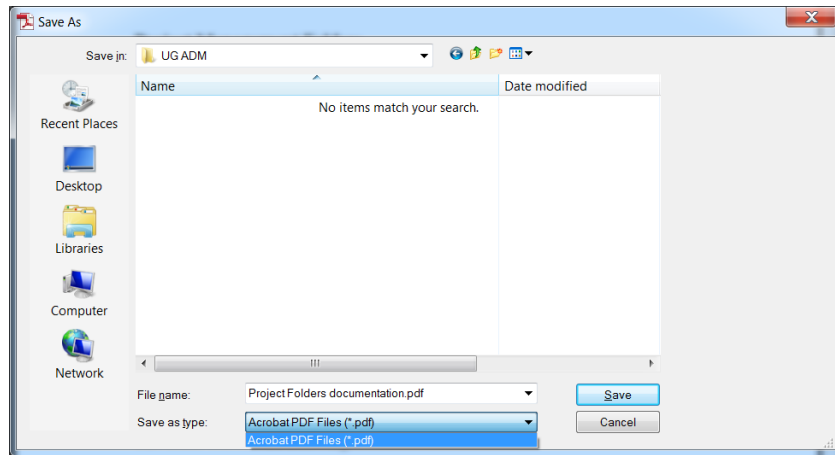
In both software products there are license restrictions and the End User Agreement should be consulted.

Instructions

1. If creating the PDF form in LiveCycle Designer save as **Adobe Static PDF Form** then open the PDF in Acrobat Pro.
or
Create the PDF form in Acrobat Pro.
2. Click File -> Save As -> Reader Extended PDF -> Enable Additional Features.
3. You will be prompted to enable usage rights. Click **Save Now**.



4. When the "Save As" window appears ensure that the **Save as type** option is set to **Acrobat PDF Files** (it is the default so it should be already set)



5. Save the PDF.

NOTE – ensure that you have not secured the PDF. Refer to the above section on PDF Security Guidelines.

2.3 Guideline #3 – Ensuring PDFs are Created Simple.

When creating a fillable form PDF some considerations need to be taken into account by the author to help ensure that the form is user friendly, provides adequate data entry space and limits the data to be entered to an appropriate, usable volume. PDF authors will need to spend time to analyse the need and requirement for the form and the information it is intended to capture.

- Determine what limit you want to place on the data being entered in the fillable form fields on the PDF. When creating that form field set the “Limit Length” property of that text field in the Field Properties. (refer to LiveCycle or Acrobat help for instructions)
- Limit the length of the data to the visible area of the text field. This means that when you create the text field create it large enough to hold the limit of data that you allow to be entered in that field. When you drop the text field on the form expand its width and height accordingly. You will also need to set the “Limit Length to Visible Area” property in the Field Properties of the text field. (refer to LiveCycle or Acrobat help for instructions)

- Text fields designed to capture name and student number should be single line fields. In the Field Properties of the text field ensure that the “Allow Multiple Lines” property is not set. (refer to LiveCycle or Acrobat help for instructions)

These considerations may result in the form being multi-page but they are designed to avoid having to create the PDF as Dynamic XML Form, which has been identified as problematic for BDM.

These considerations also help avoid small text fields turning into scrollable areas, making large amounts of data difficult to read. Not all versions of Adobe Reader render scrollable text fields in the same manner so avoiding them allows the PDF to be more consistent amongst all users.

When creating PDF Forms for BDM the rule “Simple is Better” should be adhered to.

2.4 Guideline #4 – Scanning Paper Documents & Converting Electronic Documents to PDF

WebXtender will only scan documents to image (TIF, BMP or JPEG). It will **not** scan to PDF. Therefore, if you are following a “PDF only” standard for your documents in BDM then you must use another option for scanning paper documents.

Many scanners today come with scanning software on disk that can be installed on the PCs where those scanners are being used. These software packages communicate with the scanner and allow the user to scan with increased functionality and features. In many cases one of the added features is the ability to scan to a PDF file format.

When using scanner software packages to scan paper documents to PDF in preparation for indexing in BDM the steps will be as follows:

1. Prepare the paper document(s) by ordering, removing staples, fixing corners, etc.
2. Set the scanner to scan to a PDF file format.
Note – this can vary from software to software. Some software allows this to be done through a simple scanning setting while others require the creation of a scanning profile. Refer to the Help and Manuals of the scanning software for more information.
3. Scan the document(s) to PDF and save the PDF to a directory location on the PC or the network that you can access through WebXtender.
Note – be sure to name the PDF using a clear naming convention

4. Open WebXtender and follow the steps for importing and indexing a document. You will locate the PDF and open it in WebXtender then index it into BDM.

Quite often, a student, applicant or staff member may email a document in its electronic format to a business office as an attachment. If that document is not in PDF or PDF/A format, and you are following a PDF only standard, then it will need to be converted before being imported into BDM.

The best solution is to clearly communicate to those that will be emailing documents as attachments that they must be in PDF or PDF/A format. This will ensure that they arrive in a format that requires no manual intervention.

In the event that conversion is required there are two basic options:

1. Print the attachment and scan it as a PDF using the steps above for scanning paper documents to PDF
2. If the document can be opened in MS Word 2010, open it and save as PDF. This will convert the document to PDF/A format.