

# **Technical Training Bulletin**

**MAPPING FORMS** 

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#### MAPPING FORMS

# 1. Introduction

After Product Development completes a form that will have information input electronically and will be printed out of an online platform, it needs to be "mapped." Mapping a form is done so that someone using an online platform can populate a text field with accurate information necessary to fill out the form or check appropriate check boxes before printing the form out. Having information typed into the form helps us, our clients, and their customers save time and it makes documents more readable. When a form is mapped and filled out properly, we are able to administrate contracts much more efficiently because the information that the client enters into the form is sent to our databases, eliminating the need for printed copies of contracts.

The mapping process consists of adding text fields and check boxes, known collectively as "form fields," to the PDF version of a document. Currently, the mapping system in Toro supports only two types of fields: simple and complex fields. A text field is an example of a simple field, but not all text fields are simple fields. A check box is an example of a complex field (for more information about simple and complex fields, see Sections 3.B., 3.C., and 4.B.). Toro is designed to interact with simple and complex fields that follow very specific naming syntaxes. If a text field or check box is not named properly, the mapping for that field will not function. An example of what a form will look like when properly mapped is provided below.

Before Mapping		After Mapping
FIRST AUTOMOTIVE by SouthwestRe	First Automotive	CONTRACT MARIER #ACW_theftContractStruck
AUTO COMPLETE VEHICLE PROTECTION ADMINISTRATOR OBLIGOR. First Automative Service Corporation, p. 0. San. XBSS. Advancemp. Na. 51196, 1494-04-4331. THIS SERVICE CONTR PALICY. IT & A SERVICE CONTROL TENTERS VIOL. No. 10. Res. AUXIMISTRATING COLLIDATE AND ADVANCES	Intract is insured by Dealers POLICY. IT IS A SERVICE CONTRACT BETWEEN Assurance Company, P.O. Box 21185, Upper Artir	AUTO COMPLETE VEHICLE PROTECTION Bervice Corporation, P.O. Box 30259, Absquergen, MM, 8719, 1489-834-033. THIS BERVICE CONTRACT IS NOT AN INSURANCE V YOU AND THE ADMINISTRATION OBLIGOR. The Administrator Obligate performance under this Contrast is insured by Dealers spin_071, 4222, 1490-829439. J. B covered datin and page affirm way [0] (bigs rear period close has been firely for young He
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For his Service Contract to be valid, the Biolowing terms must be clear, legible, without correction, and available to the Setting Company at the time MONTHS	Le el be tine el aute. Temo Vehicles un la los de la constance de la constance de la constance de sangares la Lided Vehicles are messurel fom he are messare do mit e Vehicle intervier Date NIS GHOUN JADUE, USED Jahon he Vehicle has teveles he solider inte, poloritario Constance du la externo. I	Ing terms must be clear, legble, without correction, and available to the Selling Company at the time of sale.
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A MAINTENANCE AND RECORDS To obtain the benefits provided by this Service Contract, You must provide maintenance to Convened Components at a Licensed Repair Facility recommended by the maintacture of Your Vehicle. Proper documentation and vehicable receipts for all maintenance and repairs will be required in must reflect by exp. maintenance into result beneficiation. Number, and the career mixegor of the Vehicle. Instantine medicy and not proof or required maintenance may result in behalf of coverage. Your failure to provide the Components of Your Vehicle with the main manufacture maintenance may result in behalf of coverage. Your failure to provide the Components of Your Vehicle with the main manufacture maintenance in organge.	the event of a claim. Receipts recommended by the manufacturer of Your Vehi must reflect the year, make, model, complete Ve	Contract, You must provice maintenance to Covered Components at a Licensed Repair Facility in accordance with what is cle. Proper documentation and verificate receipts for all maintenance and repairs will be required in the event of a claim. Receipts include identification Number, and the current mixage of the Vehicle. Hondwritten receipts will not be accepted. Failure to provide ail of overage. Your failure to provide the Covered Components of Your Vehicle with the maintenance recommended by the
YOU MUST OBTAIN AUTHORIZATION FROM THE ADMINISTRATOR BEFORE STARTING ANY TEAR DOWN PLEASE CALL TOLL FREE AT 1-877-727-7247 FOR AUTHORIZATION AND INSTRUCTIONS.		ZATION FROM THE ADMINISTRATOR BEFORE STARTING ANY TEAR DOWN OR REPAIRS. TOLL FREE AT 1-877-727-7247 FOR AUTHORIZATION AND INSTRUCTIONS. Revolution

This Technical Training Bulletin will show you which tools and documents you need to map a form, how to map automotive forms before and after uploading them to Toro (see the "UPLOADING FORMS TO TORO" Technical Training Bulletin regarding uploading forms to Toro), how to use a rate ID to help you map a form correctly, and how to map home warranty forms.



# 2. What is Needed to Map a Form

To map a form, you will need the materials and programs listed below:

- The finalized PDF version of the form you are mapping
- The rate IDs that correspond to the form that you are mapping (Underwriting should provide these to you)
- Access to the **Plan Code Tables** Excel spreadsheet, which contains all of the field names and descriptions supported by Toro. If you do not have this spreadsheet, you can request a copy from the IT department.
- Microsoft Excel
- Microsoft Word
- Adobe Acrobat X Pro (this Technical Training Bulletin uses version 10.1.3 in all examples)
- Toro v.3.0.7 (this Technical Training Bulletin uses v.3.0.7 running on Windows 7 Professional)

# 3. Process for Automotive Forms

The processes listed below will show you how to add form fields, edit simple and complex field properties, use the rate ID to determine appropriate ID numbers for complex fields, prepare a form for mapping after it has already been uploaded to Toro, and request new fields from the IT department. Please take note of all red markings on screenshots throughout this bulletin, as they show important information.

#### A. Adding Form Fields

- 1. Open the PDF version of the form in Adobe Acrobat X Pro.
- 2. Click the **Tools** button in the toolbar and click the **Forms** drop-down list box. NOTE: the location of all buttons and menus may vary depending on which version of Adobe Acrobat Professional is installed on your computer.

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Ø by SouthwestRe*		😭 Create
AUTO COMPLETE VEHICLE PROTECTION		Edit
ADMINISTRATOR OBLIGOR: First Automotive Service Corporation, P.O. Box 30250, Abbugerapue, MR, 3190, 1-800-834-433. THIS SERVICE CONTRACT IS NOT AM INSURANCE POLICY. IT IS A SERVICE CONTRACT BETWEEN YOU AND THE ADMINISTRATOR OBLIGOR. The Administrator Obligor's performance under this Contract is insured by Dealers Assurance Company, P.O. Box 21185, Upper Ahington, OH, 43221, 1400-326-3913. If a sourced dam is not paid within sixty (60) days after proof of loss has been filed. You may tile a		Distribute
claim with Dealers Assurance Company at the address listed above.		💼 Track
CUSTOMER INFORMATION SELLING COMPANY INFORMATION		📴 Highlight Existing Fields

3. Click **Edit**. If you will be mapping forms often, you should add a toolbar shortcut for the edit button by right clicking **Edit** and selecting **Add to Quick Tools**. This will allow you to skip the previous step. NOTE: depending on what version of Acrobat you are using, there may not be an **Edit** option.

2 BOE-XX-XX-01 - 06.01.12.pdf - Adobe Acrobat Pro		
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4. The Add or Edit Form Fields dialogue box will appear with the following prompt: "Currently there are no form fields in this PDF. Do you want Acrobat to detect form fields for you?" Click No. NOTE: If you click Yes instead of No, Acrobat will automatically place text fields and check boxes in the places it believes they should be placed. If you allow Acrobat to place text fields and check boxes, you *must* delete any extra form fields that you do not need (e.g. a text field for the signature line).



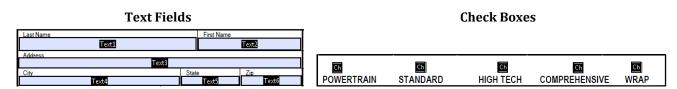
5. Determine whether you will need to use a text field or a check box for the section you are mapping. To do this, you must consider the function of the field you will be mapping. If a field will have text or numbers displayed in it (e.g. the name of a customer or dollar amount of the contract price), then use a text field. If the field needs to show a binary value (e.g. yes or no), or to select a certain option (e.g. coverage type selected or surcharges), use check boxes. See below for examples of the types of fields in which you would place text fields and check boxes.

Text Fields						Check Boxe	S	
Last Name	First Name		_					
Address								
City	State	Zip		POWERTRAIN	STANDARD	HIGH TECH	COMPREHENSIVE	WRAP

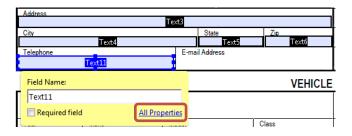
6. Under the **Tasks** list, click the **Add New Field** drop-down list. For the purpose of mapping a form, you should click only either **Text Field** or **Check Box**. You may also right-click anywhere in the document and select the field type you need from the list box that appears as shown below.

-	
T Text Field	
✓ Chec <u>k</u> Box	
loo Radio Button	
] ↓ List Box	
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<u>B</u> arcode	
<u>P</u> aste	Ctrl+V
Select All	Ctrl+A
Show Tab Numbers	
Show <u>G</u> rid	Ctrl+U
🖨 Pr <u>i</u> nt	Ctrl+P
Document Properties	Ctrl+D
Page Display Preferences	

7. Once you select the type of form field you want to insert, a set of blue crosshairs will appear where the cursor is pointing. Click and drag the cursor to draw the form field in the appropriate section of the form. Each text field and check box should fill the area where you place it as completely as possible without overlapping the borders or any text that happens to be in that field. See below for examples.



- 8. Repeat **Steps 5**, **6**, and **7** until you have inserted all form fields for all of the necessary areas of the form.
- 9. To make the text fields and check boxes function correctly with Toro, you must edit their properties. To access these properties, double click the text field or check box. If you want to edit properties as you create form fields (before creating a new form field), click the **All Properties** hyperlink, which is blue and underlined. See **Sections 3.B.**, **3.C.**, and **4.B.** for more information on how to edit properties of form fields.





## B. Editing Text Field Properties as Simple Fields

Simple fields are form fields that display information input from online platforms in text form (e.g. the customer's name, the dealership's address, or the VIN of a vehicle). As of the time of this writing, only text fields are simple fields, so this section will use text fields in these examples. To edit the properties of simple fields, complete the steps below.

- 1. Open the current **Plan Code Tables** spreadsheet in Excel.
- 2. Click the FormFields tab if the spreadsheet did not open directly to the FormFields sheet.
- 3. Use the information in the **Descriptions** column to help you select the appropriate name from the **FormFieldPrefix** column. Note that the **IsComplex** column reads as "False" for simple fields. Text field names always begin with the prefix **txt**. The form field should be named exactly as it is listed in the **FormFieldPrefix** column on the **Plan Code Tables**. No extra characters should be written into the **Field Name**.

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1 FormF		0	5	-		
2	loluo					
	UID FormFieldPrefix	IsComplex	Description			
4 1	txtContractNumber	False	Text Field for Displaying Contract Number, including Prefix			_
5 2	txtContractNumberNumeric	False	Text Field for Displaying Contract Number, numeric portion only (No Prefix)			
6 3	txtCustomerName	False	Text Field for Displaying the customer name			
7 4	txtFirstName	False	Text Field for Displaying the First Name of the contract holder			
8 5	txtMiddleName	False	Text Field for Displaying Customer Middle Name			
9 6	txtLastName	False	Text Field for Displaying the Last Name of the contract holder			
10 7	txtAddress	False	Text Field for Customer street address			
11 8	txtCityStateZip	False	Text Field for Customer City, State and Zip			
12 9	txtCity	False	Text Field for Customer city			
13 10	txtState	False	Text Field for Displaying the Customer State			
14 11	txtZip	False	Text Field for Displaying the Customer Zip Code			
15 12	txtPhone	False	Text Field for Displaying the customer phone			
16 13	txtSellingDealer	False	Text Field for Displaying the Selling Dealer Name			
17 14	txtDealerAddress	False	Text Field for Displaying the dealer's Full address, stree, city, state and ZIP			
18 15	txtDealerPhone	False	Text Field for Displaying dealer Phone #			
19 16	txtLienHolder	False	Text Field for Displaying the Lienholder Name			
20 17	txtLienHolderAddress	False	Text Field for Displaying the Lienholder Address			
21 18	txtVIN	False	Text Field for Displaying the VIN of the vehicle			
22 19	txtYearMakeModel	False	Text Field for Displaying the Year, Make and Model of the vehicle			
23 20	bxtYear .	False	Text Field for Displaying the Model Year of the vehicle			
24 21	txtMake	False	Text Field for Displaying Make of the vehicle			
25 22	txtModel	False	Text Field for Displaying the vehicle Model			
26 23	txtInserviceDate	False	Text Field for Displaying the Inservice Date of the vehicle			
27 24	txtPurchaseDate	False	Text Field for Displaying the Purchase Date of the contract			
28 25	txtOdometer	False	Text Field for Displaying the Odometer reading of the vehicle			
29 26	txtClass	False	Text Field for Displaying Class of vehicle			
30 27	txtTermMonth	False	Text Field for Displaying the Term Months			
H I F H	Formineios / Programs / Subpr	ograms / Cove	rages / Terms / Deductibles / Surcharges / Options / Classes / I 4 🛛 📖			- <b>F</b>
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- 4. Set the properties for the text field you inserted in **Section 3.A.** as illustrated below (NOTE: If an option in the **Text Field Properties** window is not mentioned specifically, it may be disregarded.):
  - a. Under the **General** tab:

Type the appropriate Form Field Prefix exactly as it is listed in the <b>Plan</b> <b>Code Tables</b> .	Text Field Properties           General         Appearance         Options         Actions         Format         Validate         Calculate	8
Under the <b>Form</b> <b>Field</b> drop-down list, click <b>Hidden but</b>	Name btLastName Tooltip Common Properties	Select the <b>Read Only</b> checkbox.
printable.	Form Field: Hidden but printable  Read Only Orientation:  Cover degrees Close Close	



b. Under the **Appearance** tab:

	Text Field Properties	8
	General Appearance Options Actions Format Validate Calculate	
Under Border Color and Fill Color, click No Color.	Borders and Colors Border Color: 🔊 Line Thickness: Thin 👻	
	Fill Color: 💽 Line Style: Solid 👻	Under the <b>Text Color</b> group box, click <b>Black</b> .
Under the Font Size combo list, enter 10.	Font Size: 10	Under the <b>Font</b> drop- down list, click <b>Helvetica</b> .
Enter <b>Auto</b> if the text box is very large or small, or you think the information will not fit with size 10 font.	Close	

c. Under the **Options** tab:

	Text Field Properties
	General Appearance Options Actions Format Validate Calculate
	Alignment: Left 💌
Leave the Alignment as Left unless the formatting of the form requires <b>Right</b> or <b>Center</b> alignment.	Default Value:
	Multi-line ✓ Scroll long text
	Allow Rich Text Formatting
By default, the <b>Check</b> <b>Spelling</b> option should be selected. Select the	Limit of Characters
Check Spelling check	Password
box to disable the spell check option.	Field is used for file selection
спеск орноп.	Check spelling
	Comb of Characters
	Close



# d. Under the **Format** tab:

	Text Field Properties
	General Appearance Options Actions Format Validate Calculate Select format category: Date Date Options
Jnder the <b>Date Options</b> ist, click <b>mm/dd/yyyy.</b>	m/d m/d/yy m/d/yyy mm/dd/yyy
	mm/yy
	Example of current format: 07/06/2012           Use the Date format category to display only the date or both date and time values. Use the Time format category to display only the time.
	Close

#### If the text field is a number

	Text Field Properties	
	General Appearance Options Actions Format Validate Calculate	
Under Decimal Places, click <b>2</b> .	Select format category: Number	For most number-related fields, click <b>Number</b> . <u>NOTE</u> : Most contracts that you map for use in Toro
Under <b>Separator Style</b> , click <b>1,234.56</b> .	Decimal Places: 2  Separator Style: 1,234.56	will have a section for a contract number. Do not select <b>Number</b> for the contract number text field.
Under Currency Symbol, click None, unless the number is a dollar amount. In that case, click \$ and under Symbol Location, click Before with space.	Currency Symbol: None  Symbol Location: Before with space  Negative Number Style: Show parentheses Use red text	Under Select format Category, click None for the contract number field.
	Example of current format: -4,123.03	
	Use the Number format category to display numbers, including currency styles.	
	Close	

# If the text field is a date



- 5. Click **Close** after editing all of the above listed properties for the simple field.
- 6. Edit all the properties of all the simple fields in the form as shown in **Step 4**. Every simple field should have a different name selected from the **Plan Code Tables** spreadsheet that corresponds with the intent of that section of the form.
- 7. Under the **File** menu, click **Save As**, and then click **Reduced Size PDF**.... The **Reduce File Size** window will appear.
- 8. Under **Make compatible with:**, click **Acrobat 5.0 and later**. Doing this reduces the likelihood of any errors or glitches occurring when someone using an older version of Adobe Acrobat attempts to open the file.

Reduce File Size					
Acrobat Version Compatibility:					
Make compatible with: Acrobat 5.0 and later					
Setting compatibility to later versions of Acrobat will allow greater reduction in file size.					
OK Apply to Multiple Cancel					

9. Click OK. The Conversion Warnings window may appear; if it does, click OK.

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									•
									ОК
									OK

## C. Editing Text Field Properties as Complex Fields

While simple fields are always text fields, not all text fields are simple fields. Non-simple fields are called **Complex Fields**. The only difference between simple and complex text fields is the naming structure in the properties (all other properties as shown in **Section 3.B.** remain the same for complex text fields). The naming structure of complex text fields includes more information than simple text fields. The additional information is shown using **ID numbers**, which are one to three digit numbers that represent many different programs, terms, coverages, and other information found in the **Plan Code Tables** spreadsheet. Name complex text fields using the following structure: (for this example, we will map the term months from form BNV-XX-XX-01 shown below):



- 1. Text field names always begin with the prefix **txt**. Because we want to include the **New** subprogram and term months, the text field name will be **txtSubProgramTermMonths**, which is listed under the **FormFields** tab of the **Plan Code Tables**.
- 2. Use a **colon** (:) to separate the text field name from ID numbers.



- 3. Find the appropriate ID numbers under the **Subprogram** tab in the **Plan Code Tables**. See **Section 3.E.** for more information on choosing ID numbers.
- 4. Add all appropriate ID numbers after the **colon**. Separate ID numbers with a **comma** (,) with no spaces between the ID numbers. In this example, the ID numbers correspond with the New subprogram (subprogram ID **1**) and the Wrap subprogram (subprogram ID **12**).
- 5. The full name for the complex field in this example looks like this: txtSubprogramTermMonths:1,12
- 6. Edit all other properties for text boxes as shown in **Section 3.B.**.

# D. Editing Check Box Properties as Complex Fields

In addition to text fields, complex fields can also be used to display information in check boxes. Check boxes have a binary status, rather than indicating text or numbers. Either the option that the check box represents is selected or it is not. For this example, this bulletin will show the process mapping a check box to show the <u>subprogram</u>, <u>coverage</u>, and <u>term</u> of a program.

- 1. Open the **Plan Code Tables** in Excel if you do not already have it open.
- 2. Click the FormFields tab if you are not already working in the FormFields sheet.
- 3. Select the FormFieldPrefix from the **FormFields** tab that corresponds to the check box you want to map. You can use the descriptions to help determine which FormFieldPrefix is appropriate. Note that the **IsComplex** column in the **Plan Code Tables** reads as "True" for complex fields. If a form field does <u>not</u> say "True" in the **IsComplex** column, then you <u>cannot</u> use it as a complex field.
- 4. Open the PDF version of the form you are mapping if it is not already open.
- 5. Double click the check box whose properties you want to edit. The **Check Box Properties** window will appear. If you do not already have a check box in place, see **Section 3.A.** for more instructions on how to add a check box.
- 6. Name check boxes using the following structure: (for this example, we will map the check box that corresponds to the New subprogram with Comprehensive coverage from form BNV-XX-XX-01 shown below):



- a. Check box names always begin with the prefix **chk**.
- b. Because we want to include the subprogram and coverage as conditions for this complex field, the check box name will be chkSubprogramCoverage. This name is listed under the FormFields tab of the Plan Code Tables (at the time of this writing, it is the 32<sup>nd</sup> FormFieldID). The name MUST be written exactly as shown above, or it will not function in Toro.
- c. Find the appropriate ID number under the tab that matches the type of information you intend have the check box indicate in the **Plan Code Tables** (e.g. if you are mapping a check box for coverage, click the **Coverages** tab). See **Section 3.E.** for more information on this step.
- d. Use a **colon** (:) to separate ID numbers from the form field name.
- e. Add all appropriate ID numbers after the **colon**. See **Section 3.E.** for more information about determining the appropriate ID numbers to use. There are a few ways to input this information:
  - i. Separate <u>ID types</u> (e.g. subprogram ID and coverage ID) with **colons** (no spaces). E.g.: **chkSubprogramCoverage:1:4** indicates the New subprogram (subprogram ID **1**) and Comprehensive coverage (coverage ID **4**).
  - ii. Separate ID numbers corresponding to the <u>same condition</u> with **commas** (no spaces). E.g.: **chkSurcharge:13,14,121** indicates the surcharges listed here: business use for passenger vehicles (surcharge ID 13); business use for trucks, vans, mini-vans, and SUVs (surcharge ID 14);



- and commercial use (surcharge ID **121**). All of these ID numbers correspond to the Commercial Use surcharge, so they all should be input to the name of the check box.
- iii. If <u>multiple values</u> will make the condition true, group them together with **parentheses**.
- iv. Use the symbol ~ to indicate that all values that are <u>NOT</u> in the preceding list (grouped with parentheses) will make the condition true.
- f. The full name for the New (subprogram ID 1) Comprehensive (coverage ID 4) check box in this example looks like this: **chkSubprogramCoverage:1:4**.
- 7. Set the rest of properties for the check box you inserted in **Section 3.A.** as illustrated below (NOTE: If a field or option is not mentioned specifically, it may be disregarded):
  - a. Under the **General** tab:

Type the appropriate FormFieldPrefix exactly as it is listed in the <b>Plan</b> <b>Code Tables</b> , then add ID numbers as shown in step <b>6</b> .	General Appearance Options Actions Name chkSubprogramCoverage:1:4 Tooltip		
Under the <b>Form Field</b> drop-down list, click <b>Hidden but printable</b> .	Common Properties Form Field: Hidden but printable v Orientation: • degrees	Read Only Required Close	Select the <b>Read Only</b> checkbox.

b. Under the **Appearance** tab:

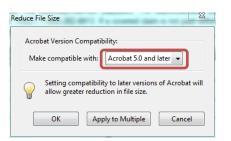
	Check Box Properties	
	General Appearance Options Actions	
Under Border Color, click Black. Under Fill Color, click No Color.	Border Color: Line Thickness: Thin  Fill Color: Line Style: Solid	Under <b>Line Thickness</b> click <b>Thin</b> . Under <b>Line Style</b> , click <b>Solid</b> .
Under <b>Font Size</b> , click <b>Auto</b> . You <u>MUST</u> do this for the check box to populate correctly.	Text Font Size: Auto  Text Color:  Font: Adobe Pi	Under <b>Text Color</b> , click Black.
	Locked Close	



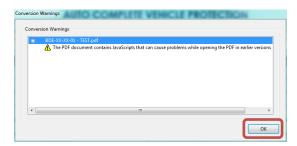
c. Under the **Options** tab:

	Check Box Properties	8	
Under <b>Check Box Style</b> , click <b>Square</b> .	General Appearance Options Actions Check Box Style: Square Export Value: Yes Check box is checked by default		Under <b>Export Value</b> , type <b>Yes</b> . Make sure to use a CAPITAL <b>Y</b> .
	Check boxes should be used to create lists of items where zero or more items can be selected at once. To make a list of items where only one item can be selected, use radio button fields.		

- 8. Click Close.
- 9. Repeat **Steps 5-8** with the other check boxes until you complete editing the properties for all the check boxes you need to map.
- 10. Under the **File** menu, click **Save As**, and then click **Reduced Size PDF**.... The **Reduce File Size** window will appear.
- 11. Under the Make compatible with: drop down list, click Acrobat 5.0 and later. Doing this reduces the likelihood
- of any errors or glitches occurring if someone using an older version of Adobe Acrobat attempts to open the file.



12. Click OK. The Conversion Warnings window may appear; if it does, click OK.



13. After mapping text fields and check boxes into the form and saving it, you are now ready to upload the form to Toro. Please see the "UPLOADING FORMS TO TORO" Technical Training Bulletin for more information.