# CREATE AND ROUTE A FILLABLE PDF

A getting-started guide for first-time form and workflow designers

## WHAT THIS GUIDE COVERS

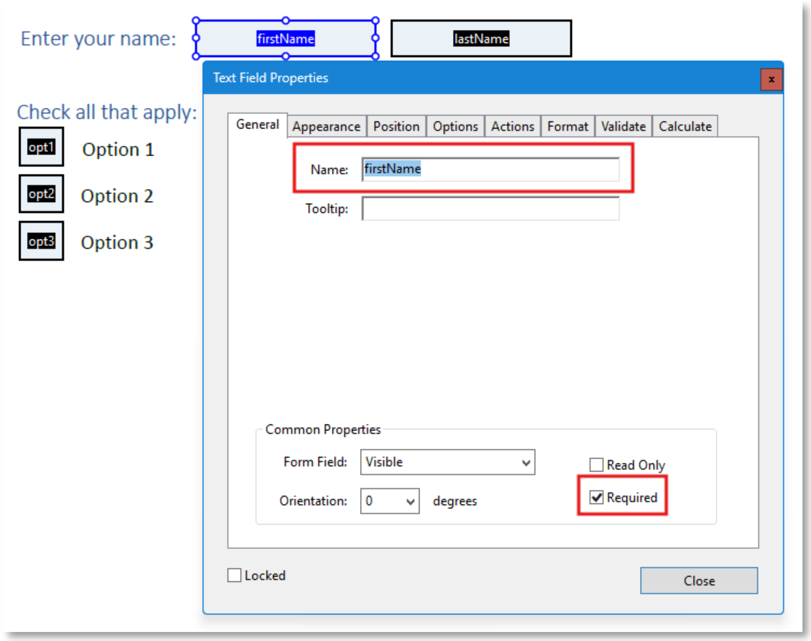
How to prepare an existing PDF form, upload it through the Classic Forms Builder, and create a simple signature workflow

## TIPS BEFORE YOU BEGIN

- Confirm that you have developer access to Admin Settings. If you need to request developer access, you can submit a **service ticket**.
- Make sure your PDF form has the fields needed to collect information and signatures from all parties.
- Determine all signers needed and whether they are internal (faculty, staff, or students) or external (e.g., parents).
- Decide the exact signing order, including each internal staff member/group and each external signer.

## PART 1: PREAPARE THE PDF

The PDF must already contain usable form fields before it is uploaded to Etrieve. To review, open the PDF in Adobe Acrobat or another PDF form editor.




*Example: reviewing a PDF field name in Adobe Acrobat*

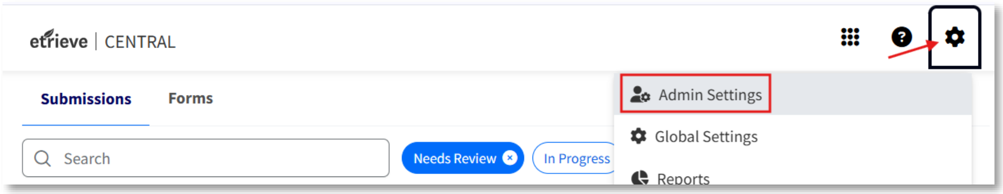
- Make sure all text fields or check boxes that are needed for completion and signatures are included.
- Give every field a clear, unique name. You can review a field's name by double clicking on that field.
- Check the *Required* box to make fields required where appropriate.
- **Use only text fields and check boxes.** Other field types are not supported in Etrieve fillable PDFs.
- Be sure to save the prepared PDF.

# PART 2: CREATE THE ETRIEVE FORM

Here, you will (1) add a new form, (2) configure the form's settings, and (3) upload your prepared PDF. Once the form has been created, you will (4) preview and publish it.

## 1 | Add a new form

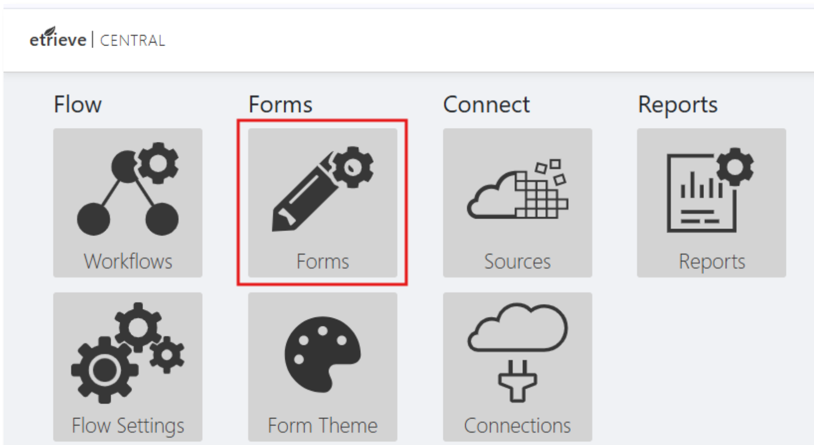
The forms builder is found in **Admin Settings**. To get there, from Etrieve Central, select the **Settings** gear from the top right, then select *Admin Settings*.




*Navigate to Admin Settings.*

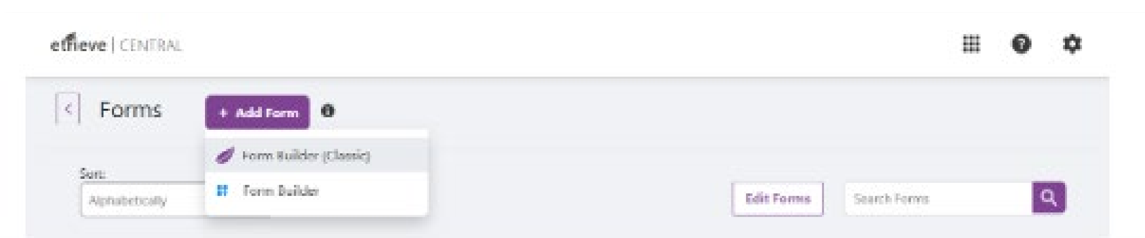
⚠ If you do not see the **Admin Settings** option, submit a service ticket to request developer access.

Select the **Forms** tile.




*Open forms builder in Admin Settings.*

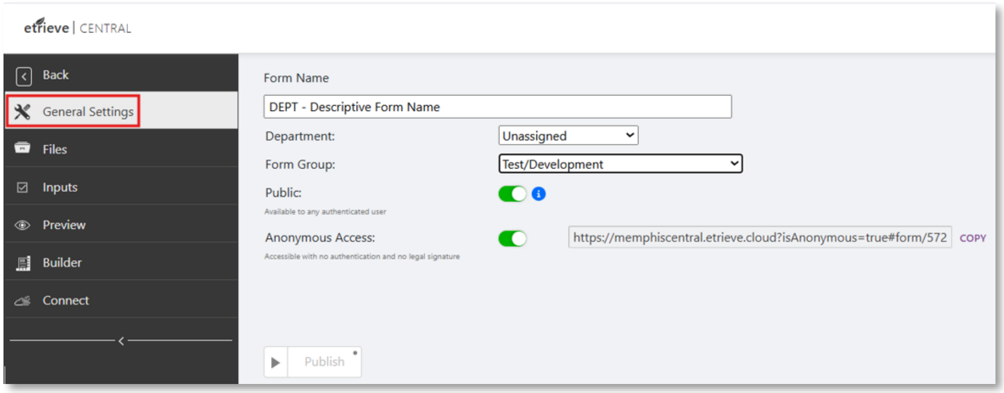
Click **Add Form** and select **Form Builder (Classic)**.




*Use the classic form builder with fillable PDFs.*

## 2 | Configure the form's settings

Click the **General Settings** tab from the menu on the left.




*Options available on the form's General Settings tab*

- Enter a unique, descriptive **Form Name**.

> Forms are listed alphabetically in Admin Settings. To keep things organized, it is recommended that your form name begins with an abbreviated department identifier.

- Leave **Department** the default value 'Unassigned'.
- Assign the appropriate **Form Group**.
    - For an initial draft or test version, select the **Test/Development** group.
    - When your form is ready to go live, update the Form Group to the appropriate department.

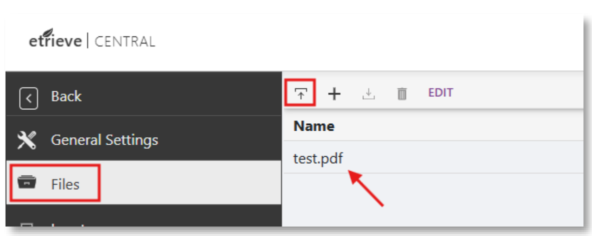
> ⚠ If you do not see an appropriate Form Group option, submit a service ticket to request developer access.

- Toggle **Public** on. This grants internal users access to the form within Etrieve Central.
- Toggle **Anonymous Access** on. This allows non-university/external users access to sign and submit the form. External signers can access the form using the system-generated Anonymous Access link.

## 3 | Upload the fillable PDF

Click the **Files** tab, then click the **Upload icon** (the upward arrow).

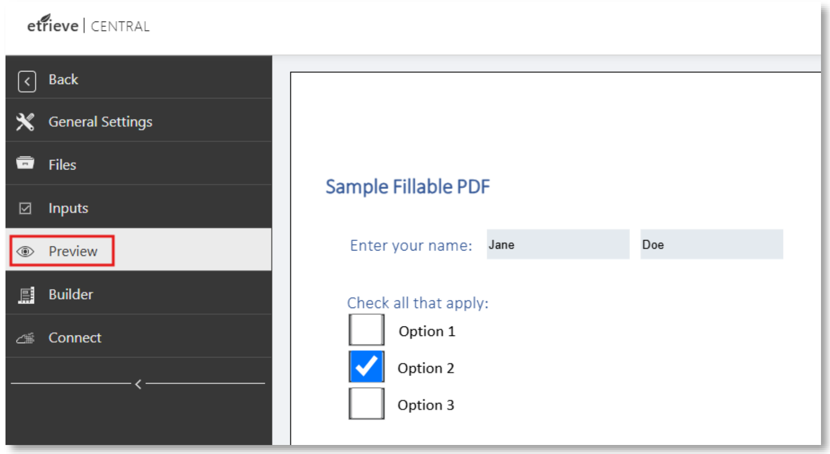
- Choose the prepared PDF from your computer.
- Confirm that the PDF appears in the file list.




*Upload the prepared PDF on the Files tab.*

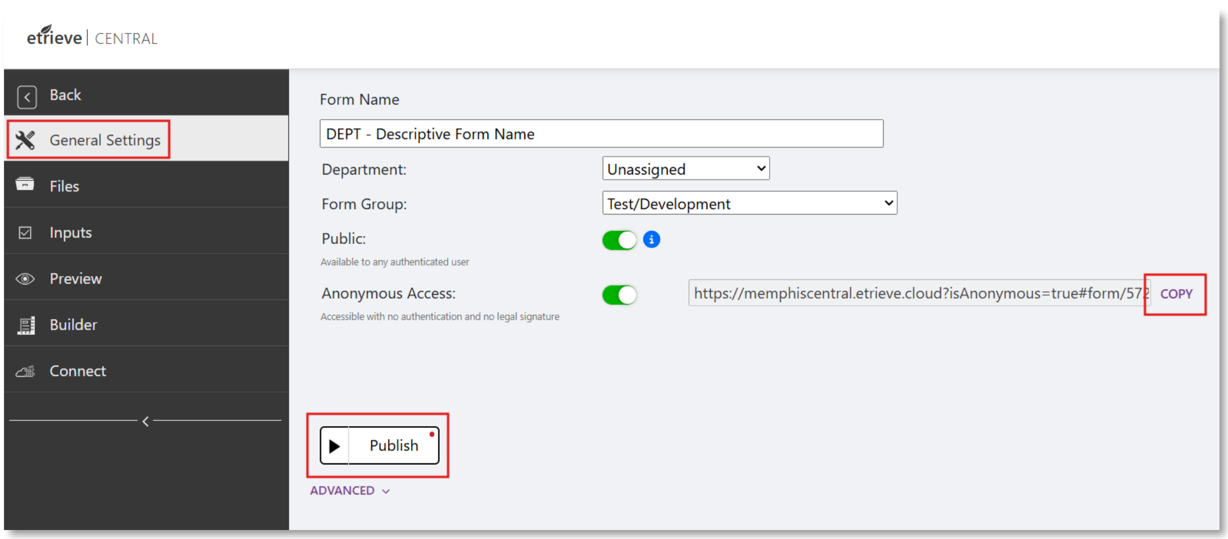
## 4 | Preview and publish the form

Click the **Preview** tab and verify that the form displays correctly and that all fields are usable.




*Preview the fillable PDF form.*

Go back to the **General Settings** tab.




*Publish the form and copy the link.*

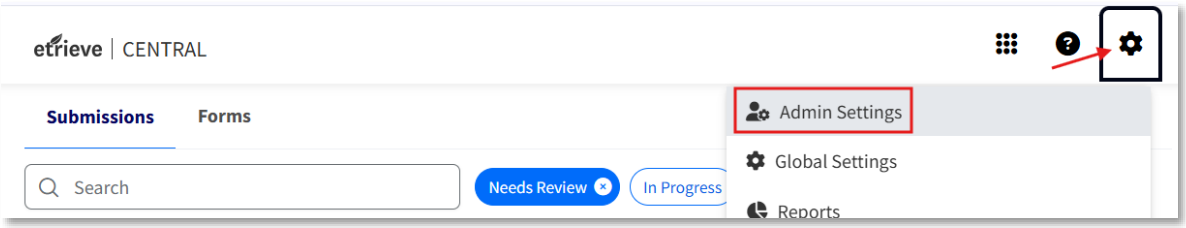
- Click the **Publish** button to make the form available for submission.
- Click the **Copy** button to copy the anonymous access link.
  - ☞ External users will use this link to access and submit the form.

# PART 3: DESIGN THE ETRIEVE WORKFLOW

Here, you will (1) add a new workflow, (2) configure the workflow's settings, and (3) design the signing workflow. Once the workflow design is done, you will (4) update the workflow status.

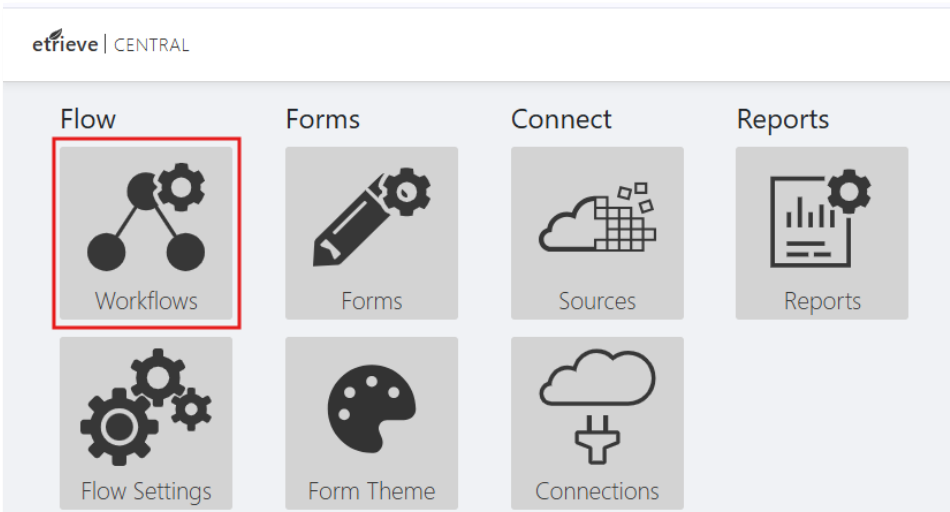
## 1 | Add a new workflow

Open Admin Settings again. From Etrieve Central, select the Settings gear from the top right, then select *Admin Settings*.



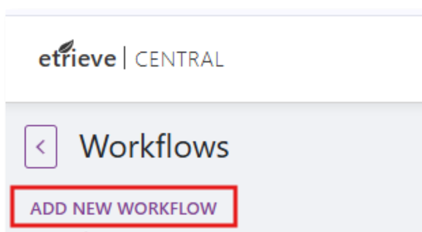

*Navigate to Admin Settings.*

Select the **Workflows** tile.




*Create a new workflow in Admin Settings.*

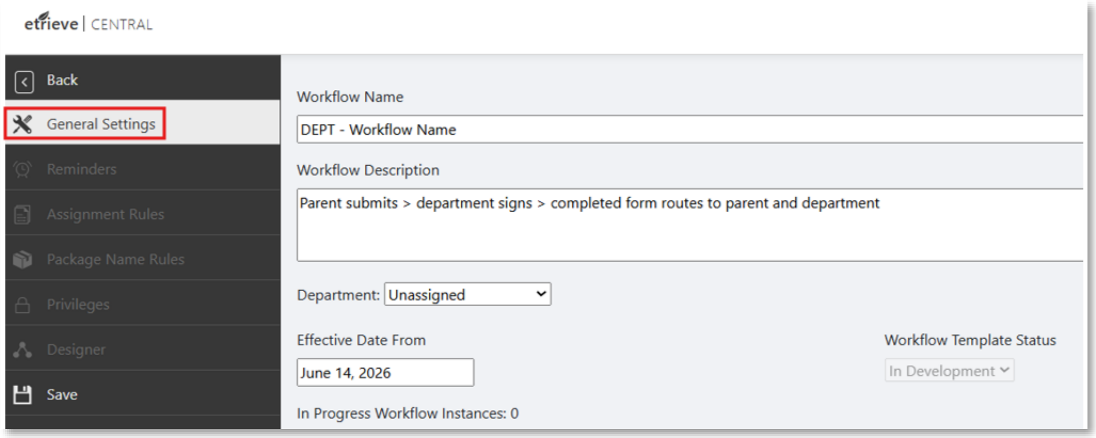
Click **Add New Workflow** from the top left.




*Add new workflow.*

## 2 | Configure the workflow's settings

Click the **General Settings** tab from the menu on the left.



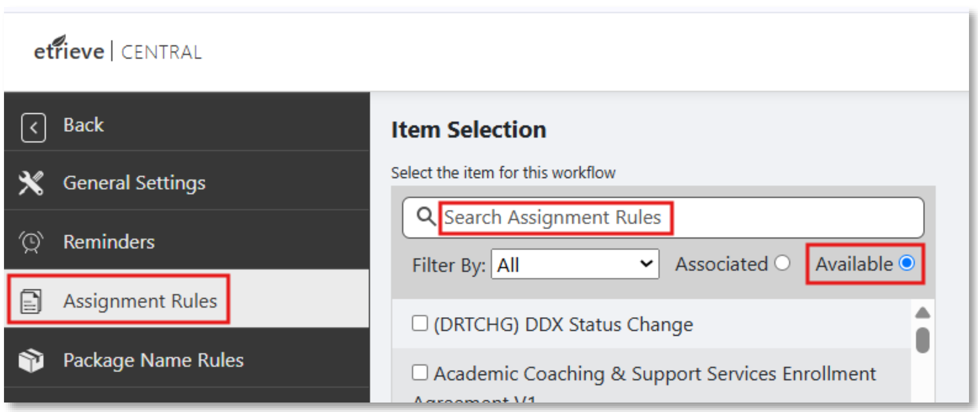

*Options available on the workflow's General Settings tab*

- Enter a **Workflow Name**.

As with forms, it is recommended that your workflow name begins with the same abbreviated department identifier. The workflow and its associated form can share the same name.

- Enter a **Workflow Description**. This should be a high-level description of the workflow and its purpose.
- Leave **Department** the default value 'Unassigned'.
- Click **Save** from the menu on the left to create the workflow.

Next, you will associate this workflow with the form you created earlier. Click the **Assignment Rules** tab from the menu on the left.

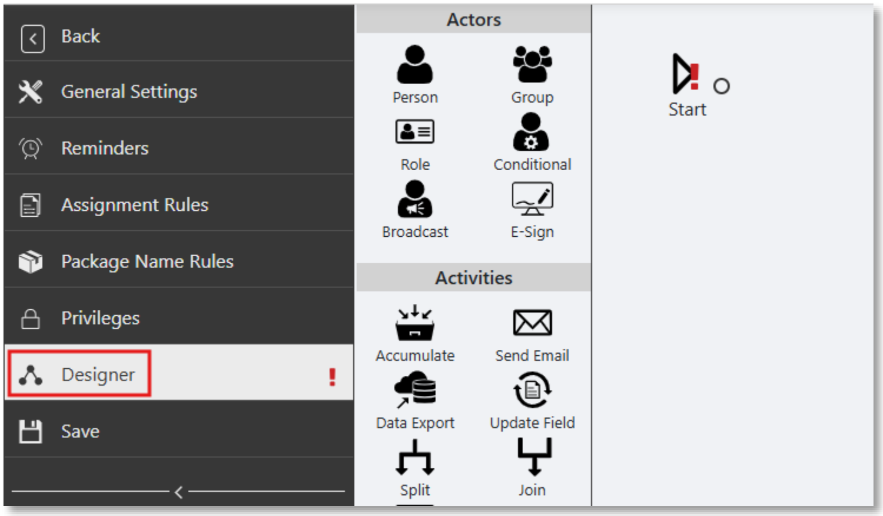



*Associate the workflow with the form created earlier.*

- Select the **Available** option.
- In the **Search Assignment Rules** box, search for the form you created, then check the box to select.
- Click **Save** from the menu on the left to update the workflow.

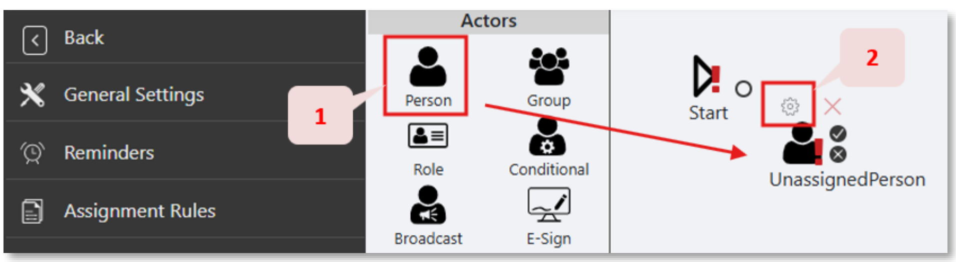
## 3 | Design the signing workflow

Workflow routing is created using the drag and drop workspace found on the **Designer** tab.




*Drag and drop workspace to design your workflow*

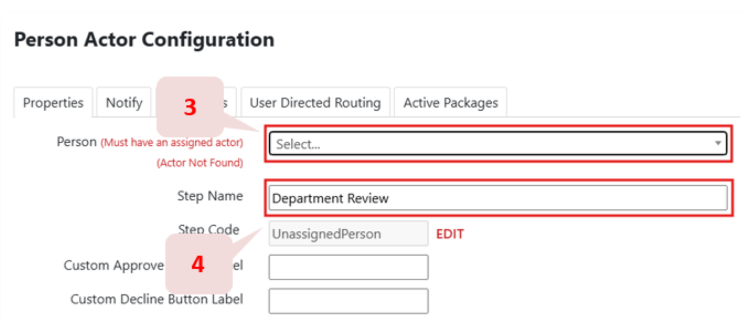
1. For each step of the workflow, drag the appropriate actor type onto the workspace.
   - **Person**: routes the form to one specific user.
   - **Group**: routes the form to all members of a selected group.
2. Hover over the actor you've placed on the workspace and click the gear icon to open the settings.



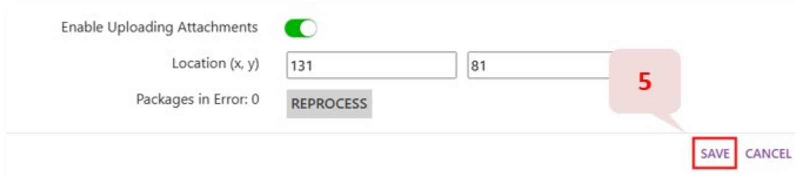

3. Select the person or group that will be signing at this workflow step.

⚠ If you do not see your group listed, submit a service ticket to request the workflow group be added.

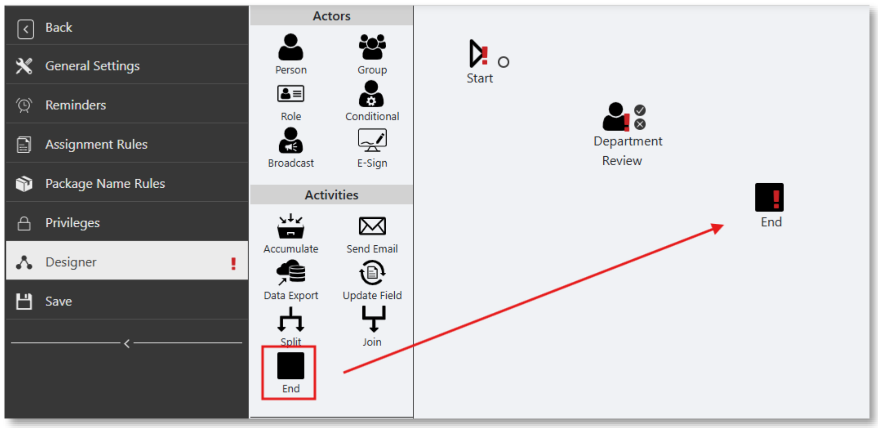
4. Give the step a clear, meaningful name.



5. Click **Save**.

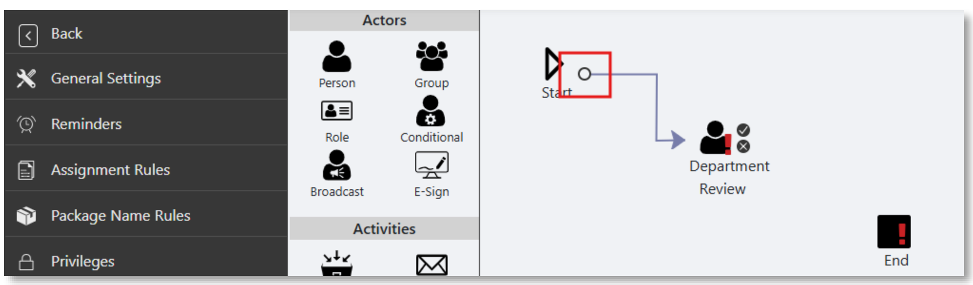



6. Repeat steps 1 – 5 for each workflow signing step.
7. Drag an **End** activity onto the workspace.

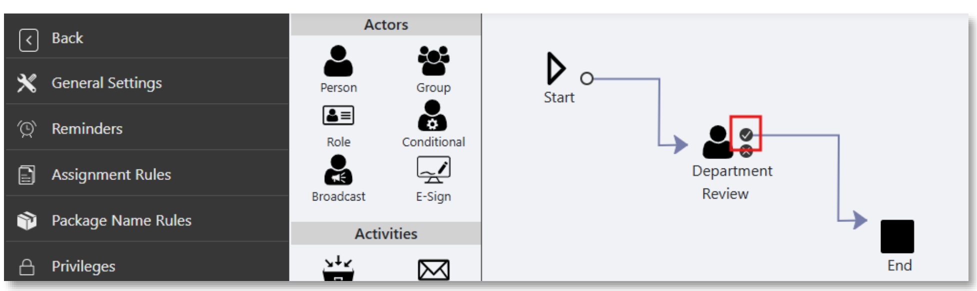



Simple workflows generally only need the **Person** or **Group** actors and the **End** activity. Other actor types, navigation rules or activities should not be necessary.

8. Click the circle on the right side of the Start icon and drag a connector to the first actor.



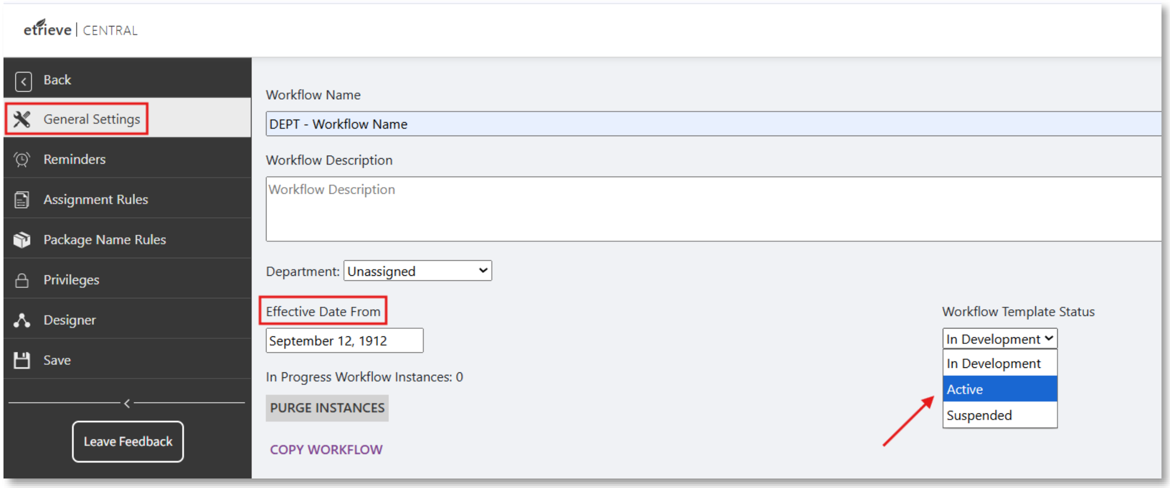

9. Click the checkmark symbol to the right of each actor and drag a connector to the next actor. Continue connecting each step in the required signing order. Connect the final actor to the **End** step.



## 4 | Update the workflow status

Once the workflow design is complete, go back to the **General Settings** tab.

- Set the Workflow Template Status to *Active*.
- Optional: set the **Effective Date From** date to document when the workflow will go into service.




*Set workflow status to Active.*

## REVIEW AND TEST

Your fillable PDF form and signing workflow are complete! Now you can view the form in the Forms Library, test the submission process, and verify that the workflow routes correctly.

For help navigating the Forms Library, refer to the Etrieve Central User Guide.

## NEXT STEPS

Once you've successfully created and tested your fillable PDF workflow, you may find these other topics helpful:

- Creating Email Templates: Customize the emails sent to workflow participants.
- Workflow Monitor: Monitor the status of workflows and troubleshoot stuck forms.