R:PDF Form Filler X.5

Help Manual

R:PDF Form Filler X.5
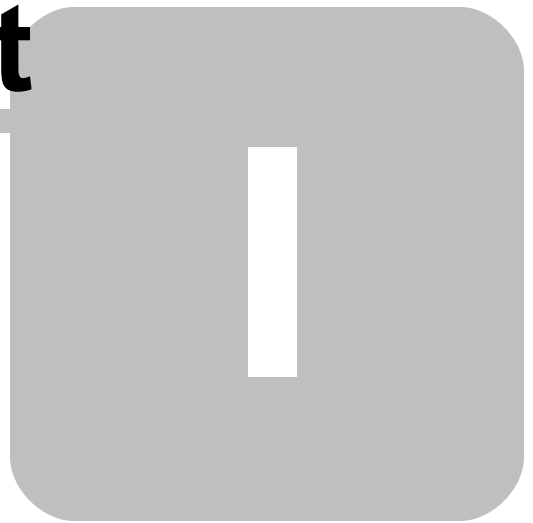
Manual

by R:BASE Technologies, Inc.

Welcome to R:PDF Form Filler X.5!

R:PDF Form Filler is a time-saving and interactive solution for filling and saving R:BASE data in PDF forms!

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Part

I

1 Introduction

1.1 Introducing R:PDF Form Filler X.5

R:PDF Form Filler enables R:BASE users to automatically fill interactive PDF forms with table data, without the need for Adobe Acrobat. PDF Form Filler can be used to save interactive PDF electronic forms to your computer to fill in and print at your convenience.

Within the R:PDF Form Filler editor, the PDF document is loaded into the window and highlights the currently selected field. For long or vague PDF document field names, a more descriptive value can be assigned, possibly table column names, for an easy reference.

R:PDF Form Filler supports PDF forms with any of the following field types:

- Text
- Check Box
- Radio Button
- Combo Box
- List Box

When working with available fields, the items may be sorted by field number or field name. When a selected fields is defined, a default value may be assigned, and fields may be rearranged within the list.

Filled PDF forms can be saved as a new PDF file with supported 128-bit encryption.

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First Edition

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1. 30-Day Limited Complimentary Technical Support

LICENSEE RESPONSIBILITIES

- To help us expedite the process and provide high quality assistance, the licensee must provide proof of purchase when calling. Proof of purchase is defined as the following: registration number, purchase date, version and build number, and company or individual to which product is registered.
- To have operating system, workstations, and local network installed and functional. RBTI will NOT be responsible for resolving issues not pertaining to the Program.
- Our support staff deals with advanced issues, therefore the person contacting RBTI for assistance should be the system administrator or have other R:BASE/SQL experience and be able to understand and implement the advice given.
- To have the database(s) being converted, safely backed-up before attempting conversion process. RBTI will NOT be held responsible for lost data or corruption as a result of advice given.

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1.4   Complimentary Technical Support

30 DAY LIMITED COMPLIMENTARY TECHNICAL SUPPORT

A. LICENSEE RESPONSIBILITIES.

1. To help us expedite the process and provide high quality assistance, the licensee must provide proof of purchase. Proof of purchase is defined as the following: registration number, purchase date, version and build number, and company or individual to which product is registered.

2. To have operating system, workstations, and local network installed and functional. R:BASE Technologies will NOT be responsible for resolving issues not pertaining to the software product.

3. Our support staff deals with advanced issues, therefore the person contacting R:BASE Technologies for assistance should be the system administrator or have other R:BASE/SQL experience and be able to understand and implement the advice given.

4. To have the database, application, and command files being reviewed, safely backed-up before attempting assistance. R:BASE Technologies will NOT be held responsible for lost data or corruption as a result of advice given.

B. R:BASE TECHNOLOGIES, INC. RESPONSIBILITIES.

1. To provide quality assistance in a timely manner to aid in the installation of the product and elementary conversion of database, application, and command files within 30 days of the date of purchase.

2. To provide a reasonable solution for any solvable issue. Not all issues may be solved, and therefore we will acknowledge the existence of known issues, or bugs, which we are presently aware of, that have no reasonable work-around.

R:BASE Technologies reserves the right to limit the amount of support time allotted to a maximum of 2 HOURS during the 30-Day Complimentary Technical Support period. We also reserve the right to limit the quantity of calls from a particular licensee to 30 MINUTES in a single day. Issues are dealt with on a case-by-case basis, and are handled at the discretion of the support agent assigned to the case. Complimentary Support is limited to INSTALLATION and ELEMENTARY CONVERSION related issues ONLY. Our support hours are Monday through Friday, from 10:00 AM to 6:00 PM (EST).

For application, design, or advanced conversion assistance, R:BASE Technologies offers Technical Support Plans of various types to meet your needs. Please visit the Support page at https://www.rbase.com/support for details and pricing.

Part II
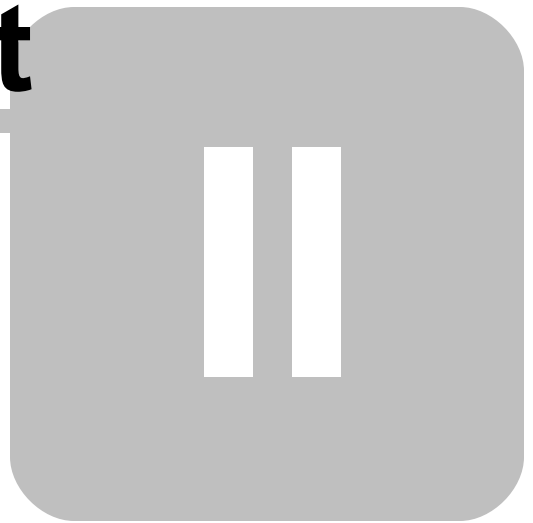
2 Installation

2.1 System Requirements

The following system specifications are recommended for the optimal use of R:BASE and R:BASE-related software.

Workstation Hardware

- 2-Core 2GHz+ CPU
- 2 GB of available RAM (4 GB recommended)
- 2 GB of available hard disk space
- 1024x768 or higher resolution video adapter and display
- Standard mouse or compatible pointing device
- Standard keyboard

Server Hardware

- 2-Core 2GHz+ CPU
- 6 GB of available RAM (8 GB recommended)

Operating System

- Microsoft Windows 11 (Professional)
- Microsoft Windows 10 (Professional)
- Microsoft Windows Server 2022
- Microsoft Windows Server 2019
- Microsoft Windows Server 2016
- Microsoft Windows Server 2012, 2012 R2

Network

- Ethernet infrastructure (Gigabyte recommended)
- Internet connection recommended, but not required, for license activation, software updates, and support
- Anti-virus programs should exclude the R:BASE program, and any add-on product, executable and database files

2.2 Things You Will Need

- License Key

  Before launching the installer, it is recommended that you have your 32-character License Key readily available. The License Key is provided in a document, with the email message, when the software was originally purchased. If you have lost or misplaced your License Key, please contact our Support Staff by email at support@rbase.com.

- Internet Access

  The computer where the software will be launched should have access to the Internet for activation. The Internet access is used to visit the R:BASE Technologies Web site to provide your required Activation Key.

  In instances where the software will be installed on a computer that is not connected to the Internet, you must then contact R:BASE Technologies to provide information displayed on the computer screen. Please contact our Product Activation Staff by email at activationkey@rbase.com. The Registration Number must be provided. The Registration Number is displayed on the invoice/order slip, and within the email, when the software was originally purchased.

2.3 Software Installation

The installation of R:PDF Form Filler is fully automated, and does not require user intervention for the initial configuration.

Run the installer ".exe", provided by download, while physically sitting at the workstation to begin the installation process, and read the installer screens for licensing and other information as the program installs.

Installation Directory

 C:\RBTI\RPDFFormFillerX5

Files Installed

 RPDFFormFillerX5.exe
 RPDFFormFillerX5.rbm
 JumpList.dll
 RPDFFormFillerX5.chm
 RPDFFormFillerX5.pdf
 License.rtf
 ReadMe.txt

Requirements:

 Plugin
 The R:PDF Form Filler X.5 Plugin file (RPDFFormFillerX5.rbm) must be placed in the R:BASE X.5 program directory or the runtime/compiled application directory.

R:BASE Version	Default Program Directory
X.5 (Version 10.5)	C:\RBTI\RBGX5
X.5 Enterprise (Version 10.5)	C:\RBTI\RBGX5E

2.4 Plugin Activation

R:BASE Plugins can be used to enhance, or extend R:BASE operations. Current R:BASE Plugins use the .RBM file extension.
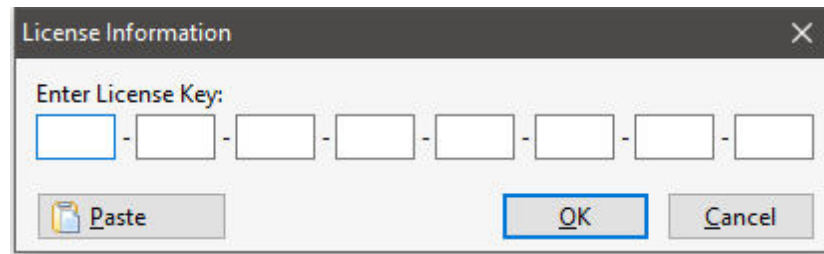
To begin using any plugin product, the plugin must be registered for use.

The license type for R:BASE and R:BASE plugin products must match. The license keys supplied with Single Seat and 5 Seat plugin products will only be accepted within Single Seat and 5 Seat versions of R:BASE, and are not accepted within R:Compiler for R:BASE or Runtime for R:BASE programs. The same license structure is also in place for Runtime License Keys for plugin products, where the key will not be accepted within Single Seat and 5 Seat Licenses R:BASE.

2.4.1 R:BASE

To begin using a plugin product, you must register the software within R:BASE by selecting "Help" > "Product Activation" from the main Menu Bar. In this window, select the "Add New" button where you can enter or copy and paste the License Key you received with your product.

Only "Per Seat" License Keys are valid for this entry screen. All "Runtime" License Keys must be registered within R:Compiler for R:BASE or within Runtime for R:BASE separately.
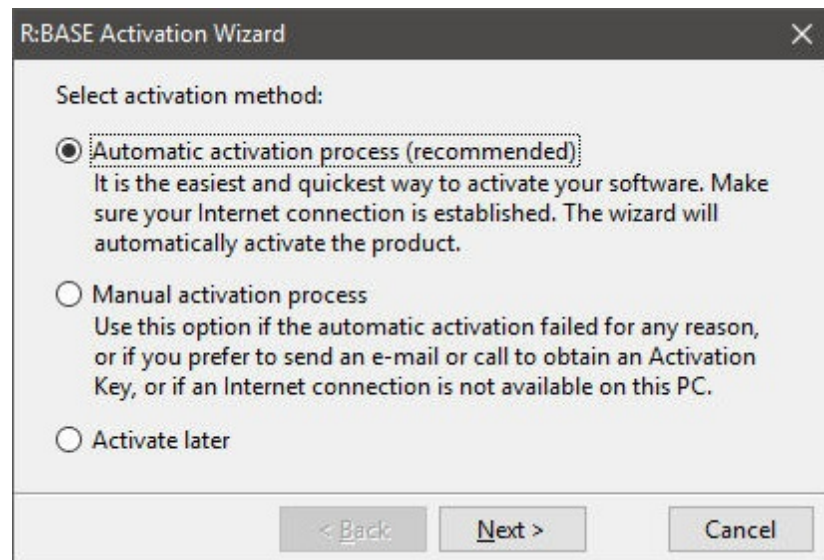
After entering the License Key, you will see a dialog to prompt for your activation method. The software can be activated automatically over the Internet, or manually by retrieving an Activation Key from R:BASE Technologies by email or over the phone. If you select "Later", you will be reminded each time R:BASE starts to activate your copy.

When activating the software manually, you select the e-mail link to launch your email client and send a pre-formatted message to R:BASE Technologies that will contain your License Key and the displayed Computer ID. You will need to provide your R:BASE Registration Number and Computer ID.
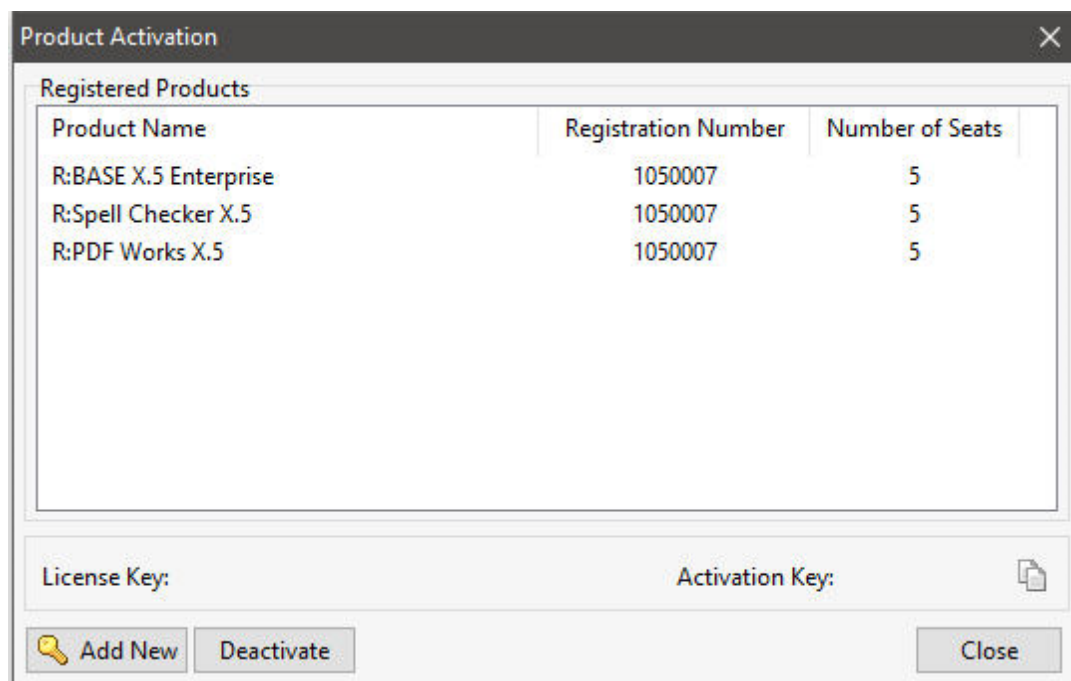
At any time, you can review your product information by starting R:BASE, and from the Menu Bar clicking on "Help" > "Product Activation". Your R:BASE Registration Number is displayed on the window. You can also enter additional License Keys for R:BASE add-on products.

Please be advised that if you are activating multiple workstations, it is highly recommended that you keep records of the computer name, Computer ID and Activation Key for future reference. Access to this information will prove convenient in the event of a hardware failure or license transfer when uninstalling R:BASE.

Please see: Uninstall/Reinstall

2.4.2 R:Compiler for R:BASE

Runtime License Key
Runtime license keys for an R:BASE Plugin must be stored within the compiled executable. A specific Runtime License Key would be provided after your purchase of the Runtime software product. Adding a Runtime License to your project can be done by selecting the "Add License" button, and pasting the appropriate Runtime License Key into the displayed dialog window.
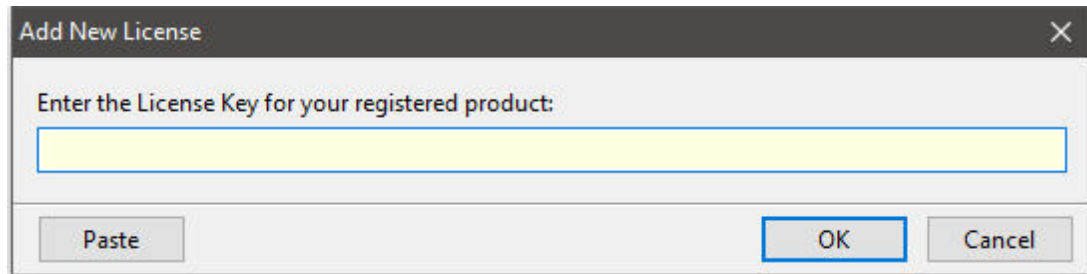
After a Runtime License is added as a resource, it will be assigned a "Resource ID". This ID consists of the word "License" and an incrementing value for the number of licenses added to the executable.

Plugin File (.RBM)
R:BASE Plugin files can be added and stored within the compiled executable or included within the R:BASE application directory. The Runtime license key pertaining to the R:BASE Plugin must be stored in the compiled executable.

Adding a Plugin to the list of resources can be performed by selecting the "Add Plugin" button on the Tool Bar. You will be prompted to locate the appropriate Plugin file with the .RBM file extension. After a Plugin file is added as a resource, it will be assigned a "Resource ID". This ID consists of the Plugin file name.

2.4.3 Runtime for R:BASE

After R:BASE Plugins are acquired for Runtime for R:BASE applications, the Plugin file must be included in the Runtime application folder, to be loaded when the Runtime application launches.

To load the Plugin, the License Key must be included into the Runtime for R:BASE session by adding the following PROPERTY command within the application startup file:

```
PROPERTY ADD_LICENSE ####-####-####-####-####-####-####-#### ' '
```

Part III
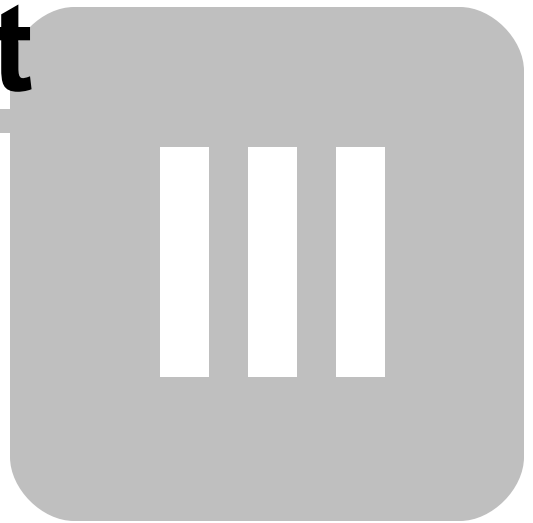
3 Uninstall

If a computer is no longer using R:PDF Form Filler, through license transfer or hardware failure, the Activation Key that was used on that computer must be submitted to R:BASE Technologies so we can then remove the Activation Key from our log. We will disable the Key, which will then free up that used activation. Once a key is reported to us as no longer in use and deactivated, it can no longer be used on that computer.

Product deactivation can be performed automatically from within R:BASE. To review your product information select "Help" > "Product Activation" from the Menu Bar. Here, the License Key and Activation Key for a selected product is available for review.
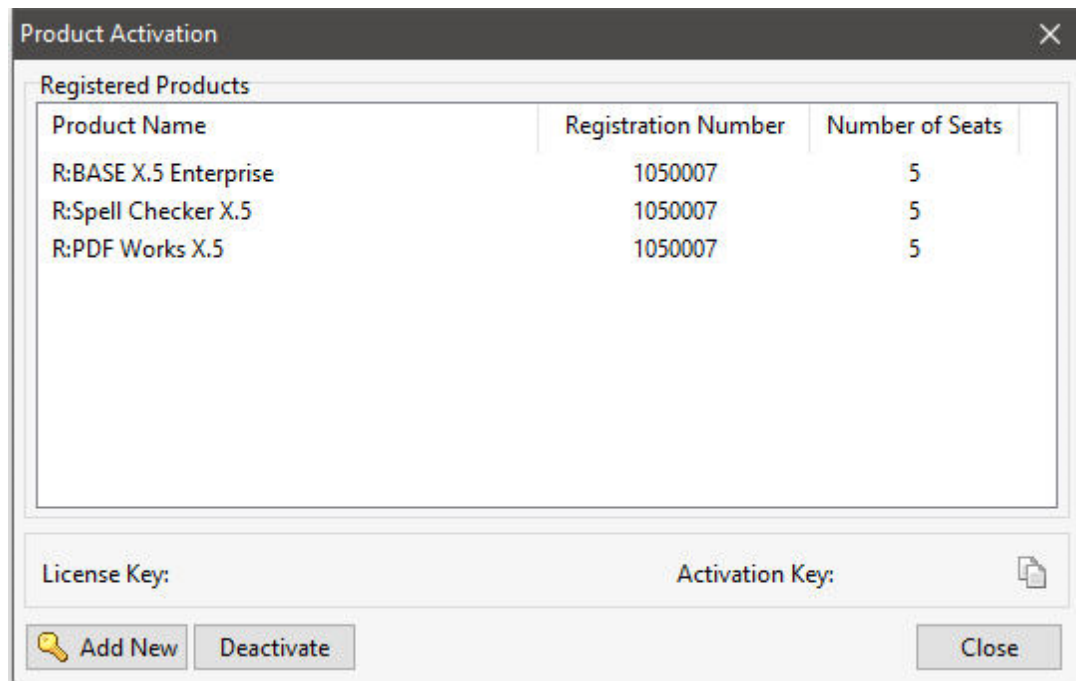
If the License Key for your product is not readily available for the license transfer, select the "Copy License Key" button to send your License Key to the clipboard.

To deactivate a listed product, select it and press the "Deactivate" button. The below confirmation dialog will appear. After selecting "Yes", the product will be removed from the list.
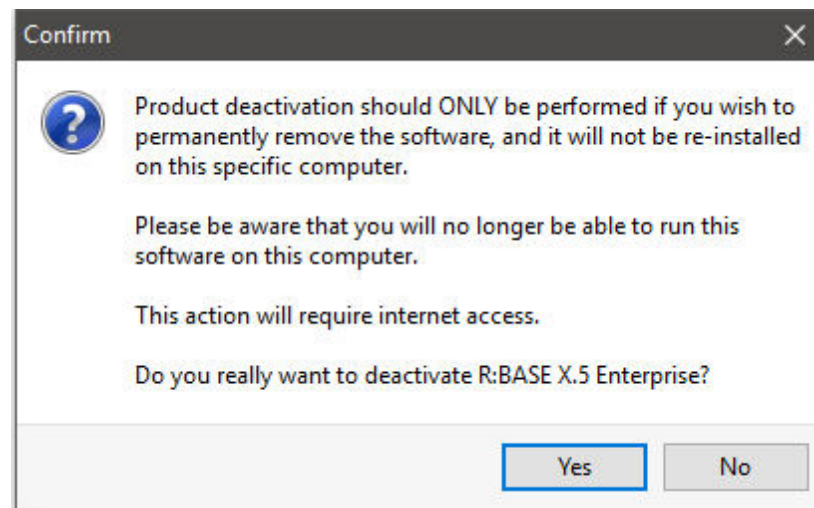
After completing the deactivation of the product, it can be successfully reinstalled and activated.

Part IV

4   Using R:PDF Form Filler

There are two different strategies in which R:PDF Form Filler can be used:

1.   Insert data into the form fields of a PDF file using the field names
2.   Insert data into the form fields of a PDF file using a script based on custom Field IDs

The basic steps for either method is described in the following table:

PDF File Method	Script File Method
1. Obtain PDF with Form Fields 2. Open PDF in R:PDF Form Filler 3. Reference Field Names in PLUGIN command 4. Use command file to insert data 5. Use command file to save changes as another PDF file name	1. Obtain PDF with Form Fields 2. Open PDF in R:PDF Form Filler 3. Assign Field IDs for field names 4. Reference Field IDs in PLUGIN command 5. Use command file to insert data 6. Use command file to save changes as another PDF file name

Part V

5 R:PDF Form Filler Editor

The R:PDF Form Filler Editor allows users to launch the PDF document in which data will be inserted, and establish field associations between the existing PDF Field Names and "Field ID" values, which are assigned manually. While browsing the PDF document, all established fields in the file will be provided within the "Available Fields" panel.

While the option is available to create Field ID values for the PDF Field Names, it is not required. The R:PDF Form Filler Plugin can be used to insert your data data into the form fields using the PDF Field Names or the custom created Field ID values. The option is available due to the vague naming conventions that might exist for the PDF Field Names, or the names may be very long strings.

If Field ID values are assigned for the PDF Field Names, it is suggested that you assign your R:BASE table column names for the Field IDs in order to easily associate the column to the field in which the data will be inserted.

5.1 Toolbar

Button	Description
	Creates a new script
	Opens a script
	Saves the displayed script
	Saves the displayed script as a new script name
	Moves the display to the First Page
	Moves the display to the Previous Page
	Moves the display to the Next Page
	Moves the display to the Last Page
	Adjusts the zoom percentage
	Zooms in
	Zooms Out
	Launches the help manual
	Displays the version and build
	Exits the R:PDF Form Filler Editor

5.2 Input File Name

The "Input File Name" panel allows for a PDF file, that contains fields to be filled, to be loaded into the R:PDF Form Filler editor window. The folder icon to the right of the panels allows for browsing the computer for the file location.

Input File Name

C:\RBTI\RPDFFormFillerX5\fw9.pdf

5.3   Available Fields

The "Available Fields" panel displays the list of established fields for the PDF file that was loaded into the R:PDF Form Filler editor window.

The naming conventions defined in this panel are not editable in R:PDF Form Filler, but rather were the field names defined by the PDF file creator. Some fields may be descriptive enough to associated with the PDF file while others are not. The text length of the fields names may also be very long strings, which is why R:PDF Form Filler allows the ability to assign Field IDs to each available field.

To assign a more descriptive value for any of the items listed with the "Available Fields" panel, select the "Add to Selected Fields" button (green arrow) at the bottom of the panel. The two buttons next to the green arrow are toggles to control the sorting of the available fields. The Available Fields may be sorted Field Number or Field Name.
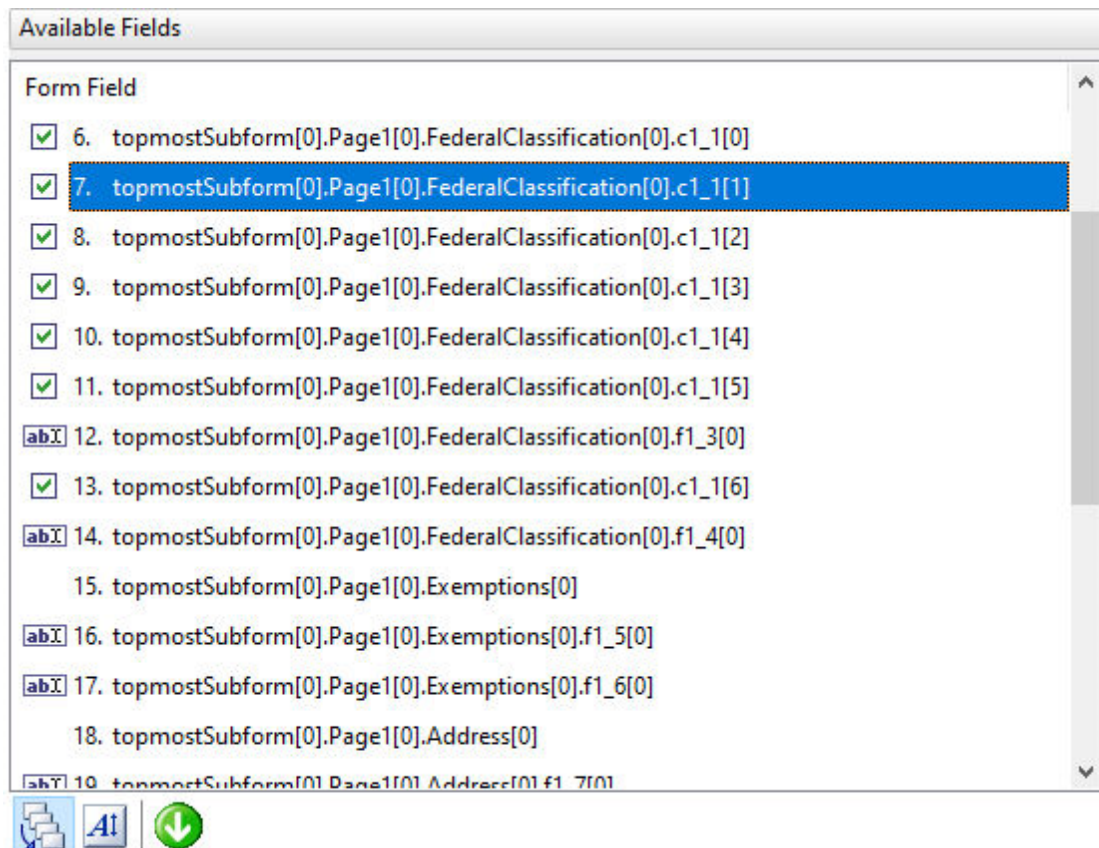
After pressing the "Add to Selected Fields" button, the "Field Properties" dialog is displayed for the selected "Field #" in the list. The "Field ID" field is available for editing to specify a more descriptive value for the item. Based on the type of control that the field is based upon (check box, radio button, etc.) the dialog will display options for a possible default value for the control.

After the changes are made and the "OK" button is selected, the new Field ID will appear in the Selected Fields panel.

5.4   Selected Fields

The "Selected Fields" panel displays the custom Field ID items that have been assigned to the Field Names which exist on the PDF document. The panel displays the Field ID, Field Name, and Default Field Value, if exists.

After any item is added to the "Selected Fields" panel, the item can be edited or deleted using the buttons, or the right click popup menu. When editing a Field ID, the "Field Properties" dialog is displayed for the selected item in the list. The "Field ID" field is available for editing. Based on the type of control that the field is based upon (check box, radio button, etc.) the dialog will also display options for a possible default value for the control.

The field order may be altered using the the Move Up and Move Down options, or by dragging a field within the Selected Fields panel.

Part VI

6   Command Syntax

The R:PDF Form Filler command syntax is used to assign data to the PDF form fields. The data can be gathered from tables into variables and passed with the PLUGIN command. Each parameter must be separated with the pipe "**|**" character.

<div align="center">

PLUGINS RPDFFormFiller VarName|Parameter|Value1|Value2

</div>

"**VarName**" is the resulting text variable which will return a "OK" value if no errors occur. In the event of an error, the resulting value will be "-ERROR-" with the appropriate message.

"**Parameter**" is the available option recognized by the Plugin

"**Value**" is the specific value used by the available parameter

File Parameters

Parameter	Value	Description
SCRIPT_FILE_NAME	File Name	Specifies the R:PDF Form Filler script file (.rps) to be loaded
INPUT_PDF_FILE_NAME	File Name	Specifies the PDF file to be loaded
OUTPUT_TO_FILE	File Name	Specifies the PDF output file name
FLATTEN_FIELDS		Specifies to convert modified fields to regular text. The option is available for some documents where the security settings prevent added values from being displayed. Add FLATTEN_FIELDS after the OUTPUT_TO_FILE parameter.

Field Parameters

Parameter	Value 1	Value 2	Description
SET_FIELD_VALUE_BY_ID	R:PDF Form Filler Field ID	Value	Specifies the unique ID value assigned to a PDF File Field Name and saved within the script file
SET_FIELD_VALUE_BY_NAME	PDF File Field Name	Value	Specifies the Field Name as defined in the PDF File

Example

1. Example to load a predefined script file:

```
PLUGIN RPDFFormFiller vLoadScript|SCRIPT_FILE_NAME|Application_2304.RPS
```

2. Example to load different PDF file that the script is based upon, or to open a PDF File for inserting data by Field Names:

```
PLUGIN RPDFFormFiller vLoadPDF|INPUT_PDF_FILE_NAME|Application_2304.PDF
```

3. Example to change/insert data for a field based upon the Field ID value (used with loading script files):

```
PLUGIN RPDFFormFiller vError|SET_FIELD_VALUE_BY_ID|FirstName|Jane
PLUGIN RPDFFormFiller vError|SET_FIELD_VALUE_BY_ID|LastName|Doe
```

4. Example to change/insert data for a field based upon the Field Name (used with loading PDF files):

```
PLUGIN RPDFFormFiller vError|SET_FIELD_VALUE_BY_NAME|FillText01|Jane
PLUGIN RPDFFormFiller vError|SET_FIELD_VALUE_BY_NAME|FillText02|Doe
```

5. Example to save changes form field changes to a specified PDF file:

```
PLUGIN RPDFFormFiller vSavePDF|OUTPUT_TO_FILE|Applicant_JaneDoe.PDF|FLATTEN_FIELDS
```

Part VII

7 Command File Example

The following example uses a U.S. Earned Income Tax (fillable PDF) document. Once downloaded and opened with the R:PDF Form Filler program, the document is treated as one file with all of the 50 + fields.

Using the R:PDF Form Filler interface, the Available Fields are then reviewed, and set as Selected Fields to each field data is to be inserted. If needed, different "Field ID" values can be assigned. The benefit for assigning a custom Field ID is for easier recognition when coding the data insertion portion of the PDF file, as some actual field names can cryptic. Once the fields are established, a script file for the fillable PDF document is saved.

Then, in the command syntax, the following would be used to insert data:

```
PLUGIN RPDFFormFiller vLoadPDF|INPUT_PDF_FILE_NAME|f941.PDF
PLUGIN RPDFFormFiller vLoadScript|SCRIPT_FILE_NAME|F941_Script.RPS

PLUGIN RPDFFormFiller vError|SET_FIELD_VALUE_BY_ID|EIN_1|3
PLUGIN RPDFFormFiller vError|SET_FIELD_VALUE_BY_ID|EIN_2|4
PLUGIN RPDFFormFiller vError|SET_FIELD_VALUE_BY_ID|EIN_3|6
PLUGIN RPDFFormFiller vError|SET_FIELD_VALUE_BY_ID|EIN_4|7
PLUGIN RPDFFormFiller vError|SET_FIELD_VALUE_BY_ID|EIN_5|8
PLUGIN RPDFFormFiller vError|SET_FIELD_VALUE_BY_ID|EIN_6|7
PLUGIN RPDFFormFiller vError|SET_FIELD_VALUE_BY_ID|EIN_7|3
PLUGIN RPDFFormFiller vError|SET_FIELD_VALUE_BY_ID|EIN_8|1
PLUGIN RPDFFormFiller vError|SET_FIELD_VALUE_BY_ID|EIN_9|1

PLUGIN RPDFFormFiller vSavePDF|OUTPUT_TO_FILE|CustID_24553_f941.PDF|FLATTEN_FIELDS
RETURN
```

The resulting CustID_24553_f941.PDF will have the fields completed and saved.

The PDF output file can opened with the LAUNCH command, and the user can print the file with whatever PDF reader is currently installed on the computer.

The PDF file can also be loaded into the database.

Part VIII

8 Technical Support

Please read over the help documentation at least once before seeking support. We have worked very hard to make the help documentation clear and useful, but concise. It is suggested that you reread these instructions once you have become accustomed to using the software, as new uses will become apparent.

If you have further questions, and cannot find the answers in the documentation, you can obtain information from the below sources:

- Email our Technical Support Staff at: support@rbase.com
- Access the R:BASE Technologies Support home page online at https://www.rbase.com/support

You may be required to purchase a technical support plan. Several support plans are available to suit the needs of all users. Available Technical Support Plans

Please be prepared to provide the following:

- The product registration number, which is located on the invoice/order slip for the purchased product
- The type of operating system and hardware in use
- Details regarding your operating environment; such as available memory, disk space, your version of R:BASE, local area network, special drivers, related database structures, application files, and other files that are used or accessed by your application

All provide information will be used to better assist you.

R:BASE Technologies has a number of different services available for R:BASE products. As a registered user, you will receive information about new features for R:BASE and other R:BASE Technologies products. Please remember to register your software. https://www.rbase.com/register/

Part IX

9 Useful Resources

. R:BASE Home Page: https://www.rbase.com

. Up-to-Date R:BASE Updates: https://www.rbaseupdates.com

. Current Product Details and Documentation: https://www.rbase.com/rbgx5

. Support Home Page: https://www.rbase.com/support

. Product Registration: https://www.rbase.com/register

. Official R:BASE Facebook Page: https://www.facebook.com/rbase

. Sample Applications: https://www.razzak.com/sampleapplications

. Technical Documents (From the Edge): https://www.razzak.com/fte

. Education and Training: https://www.rbase.com/training

. Product News: https://www.rbase.com/news

. Upcoming Events: https://www.rbase.com/events

. R:BASE Online Help Manual: https://www.rbase.com/support/rsyntax

. Form Properties Documentation: https://www.rbase.com/support/FormProperties.pdf

. R:BASE Beginners Tutorial: https://www.rbase.com/support/rtutorial

. R:BASE Solutions (Vertical Market Applications): https://www.rbase.com/products/rbasesolutions

Part X

10   Feedback

Suggestions and Enhancement Requests:

From time to time, everyone comes up with an idea for something they'd like a software product to do differently.

If you come across an idea that you think might make a nice enhancement, your input is always welcome.

Please submit your suggestion and/or enhancement request to the R:BASE Developers' Corner Crew (R:DCC) and describe what you think might make an ideal enhancement. In R:BASE, the R:DCC Client is fully integrated to communicate with the R:BASE development team. From the main menu bar, choose "Help" > "R:DCC Client". If you do not have a login profile, select "New User" to create one.

If you have a sample you wish to provide, have the files prepared within a zip archive prior to initiating the request. You will be prompted to upload any attachments during the submission process.

Unless additional information is needed, you will not receive a direct response. You can periodically check the status of your submitted enhancement request.

If you are experiencing any difficulties with the R:DCC Client, please send an e-mail to rdcc@rbase.com.

Reporting Bugs:

If you experience something you think might be a bug, please report it to the R:BASE Developers' Corner Crew. In R:BASE, the R:DCC Client is fully integrated to communicate with the R:BASE development team. From the main menu bar, choose "Help" > "R:DCC Client". If you do not have a login profile, select "New User" to create one.

You will need to describe:

- What you did, what happened, and what you expected to happen
- The product version and build
- Any error message displayed
- The operating system in use
- Anything else you think might be relevant

If you have a sample you wish to provide, have the files prepared within a zip archive prior to initiating the bug report. You will be prompted to upload any attachments during the submission process.

Unless additional information is needed, you will not receive a direct response. You can periodically check the status of your submitted bug.

If you are experiencing any difficulties with the R:DCC Client, please send an e-mail to rdcc@rbase.com.

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