



Quick Start Guide

7/18/2024



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Purpose

ExpressAbility Document Filler automatically builds completed forms by merging data from a provided data source into fillable fields. This is made possible using a mapping methodology, whereby detected source and destination fields are chosen from a dropdown and saved by a user.

This project may serve as a standalone application, but is intended to be modified to meet the needs of your organization and specific use case.

Components

Document Library

The Document Library consists of uploaded PDFs consisting of fillable form fields. Any PDF uploaded to your Document Filler library can be filled with data from a data source. Note that fillable PDFs sometimes have field names (field identifiers) that are named in a way that is not particularly user-friendly.

Mapping Set

A Mapping Set is the user-defined mapping between your data source fields (the source) and the document's form fields (the destination). A single PDF in the library can have multiple Mapping Sets, supporting differing source file data arrangements (column names and column ordering).

My Filled Forms / Build Events

My Filled Forms is where all of your (user-specific) document build processes are located. Within a specific build process detail page, completed/filled forms can be viewed or downloaded.

How to Use - Step by Step Guide

Summary:

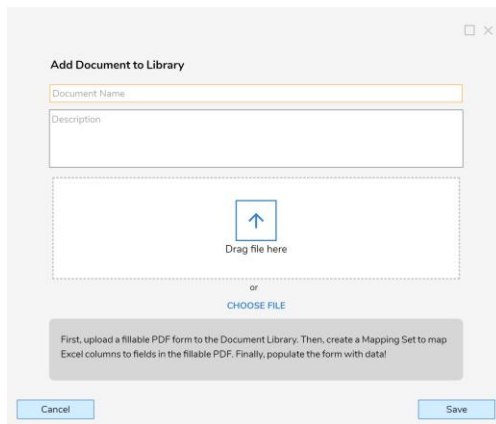
1. Upload fillable PDF file to the Document Library
2. Create a Mapping Set: Upload a reference data source file and map fields
3. Launch a form population process and upload data source file
4. Watch progress and view results from My Filled Forms tab

1. Upload fillable PDF File to the Document Library

Document Filler (Portal Folder) > Form Library Tab > + Add Form button



Upload a PDF that has fillable form fields.

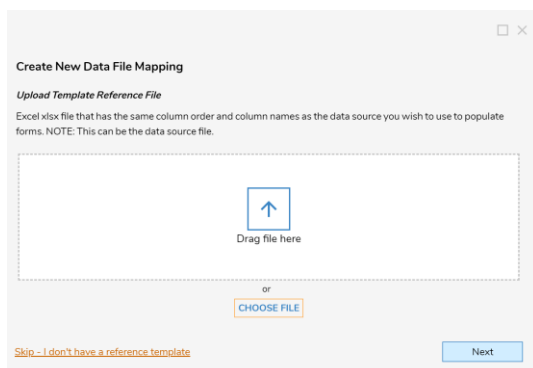


2. Create a Mapping Set: Upload a Reference Data Source File and Map Fields

Document Filler (Portal Folder) > Form Library Tab > (Right Click Form Library Item) > Create Mapping

-OR- After adding a new Form Library item, click the button “Create Mapping” button.

Upload a Template Reference file – this is an Excel file that provides the same structure (exact same column names) as the data source you intend to use to populate the form. This could be the data source Excel file itself.



Name the Mapping Set, and then select a Source Field for each PDF field that you wish to populate with data (Form fields are on the LEFT, Data source fields are on the RIGHT). To test selections prior



to saving, you can click “Generate First Row Preview” and the form viewer will preview selected mappings for your review.

NOTE: Some PDF forms do not have clearly named fields. Trial and error may be needed to fill the correct fields with the correct data. Use of the “Generate First Row Preview” functionality makes this refinement possible.

The screenshot shows the Document Filler interface. On the left, there is a mapping table with columns 'Doc Field' and 'Source Field'. Below the table are 'Switch Source' and 'Save' buttons. On the right, a preview of Form 426 is shown, titled 'Request for Refund of Taxes or Fees Paid on Vehicle or Marine'. The form includes fields for Name, Mailing Address, City, State, Zip Code, E-mail Address, Telephone Number, and a section for 'Approved refunds are payable to the person "legally obligated to remit the tax."'. There are also checkboxes for '195-Day Credit', 'Local Tax', and 'Rescinded Sale'.

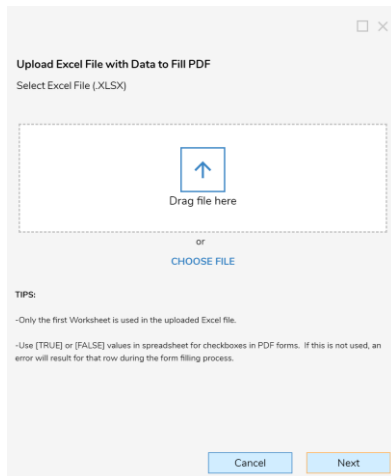
3. Launch a Form Population Process and Upload Data Source File

Document Filler (Portal Folder) > Form Library Tab > (Right Click Form Library Item) > Populate Form with Data

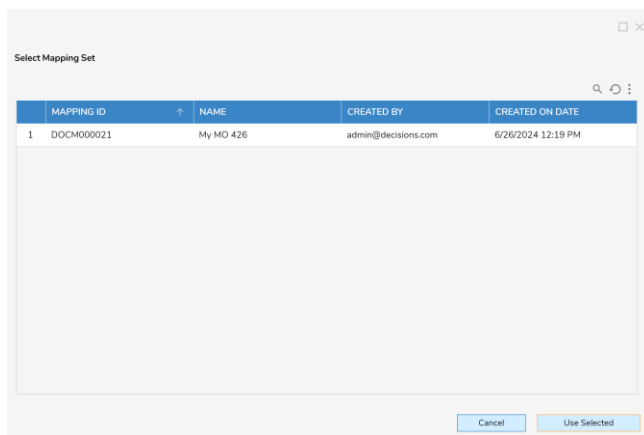
- Create Mapping
- Delete Document
- Edit Document
- Populate Form with Data**
- View Document

Upload the Excel file data source to be used to populate the selected PDF.

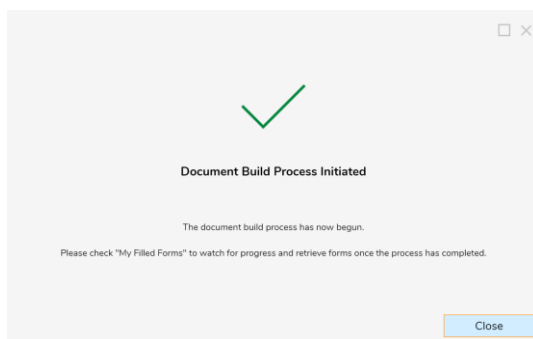
NOTE: If checkboxes (Boolean fields) exist in your PDF form and you desire to populate these fields, it is required that you represent this data in a specially formatted way in your data source (Excel file). These fields should be populated with text/string values as follows: [TRUE] or [FALSE] –include the capital case and the square brackets. Errors will result from trying to populate checkbox fields with data in other formats.



Select the previously created/configured Mapping Set you wish to use for this Document Build Process and click “Use Selected”.



Verification that the Document Build Process has been initiated should display.



4. Watch Progress and View Results From My Filled Forms Tab

Document Filler (Portal Folder) > My Filled Forms Tab > (Click on the Build Job)



Check the status of your build process.

Possible Resulting Statuses

| | |
|---|-----------------------|
| ✓ | Completed |
| ✓ | Completed with Errors |
| ⊘ | Canceled |



Form Library | My Filled Forms

| BUILD ID | FORM | MAPPING | STATUS | START | END |
|--------------|--------|-----------|-----------|-------------------|-------------------|
| ✓ DOCB000060 | MO 426 | My MO 426 | Completed | 7/18/2024 3:26 PM | 7/18/2024 3:26 PM |

Build Process Details Interface Functionality

1. Each generated file can be downloaded individually by Row number.
2. Viewer allows display of the generated PDF. Select the document in the drop down above the viewer area.
3. “Build Combined Document” link will initiate a back-end process to generate a single PDF document containing all generated documents combined into one. This operation can consume significant server resources (memory, CPU) for large volumes of PDFs and PDF with many pages.

Once the combining process has completed, a new link will appear, “Download Combined PDF File.”

[DOCB000060] MO 426 / My MO 426 (admin@decisions.com)

[Download Combined PDF File](#)

Row000002.pdf

[Build Combined Document](#)

4. Errors—View rows where issues were encountered during the form-filling process.

Build Process Details Interface:

The screenshot displays the interface for build process details. At the top, it shows the build ID [DOCB000060] MO 426 / My MO 426 (admin@decisions.com) and progress indicators (5 secs, 100%, Completed). Below this is a list of generated files, each with a 'Download' link. The files are named Row000002.pdf through Row000021.pdf, followed by an 'Errors' link. The main area shows a preview of a form titled 'Form 426 - Request for Refund of Taxes or Fees Paid on Vehicles or Marine'. The form includes fields for Name (John Smith), Telephone Number, Mailing Address (222 Main Ave, Kansas City, MO 64101), E-mail Address, and Date (MM/DD/YYYY). It also contains checkboxes for '180-Day Credit' and 'Local Tax'.



Who is ExpressAbility?

ExpressAbility is a US-based partner that specializes in helping clients maximize the value of the Decisions platform for their business. Succeeding with no-code/low-code solutions requires strategic thinking and execution.

By partnering with ExpressAbility, you gain instant access to a team of experts who will ensure you achieve optimal results with the Decisions platform. Get ready to unlock new levels of success with our guidance!



| | |
|-------------------------------------|-----------------------------------------------------------------------------|
| Years in Business | 21 |
| Years as a Decisions Partner | 11 |
| Geography | Based in the Midwest (St. Louis) Employees throughout the US |
| Practice Lead | Jason Drinen (jdrinen@expressability.com) |
| Website | https://www.expressability.com |

Services

Staff Augmentation—Instantly expand your team with expert developers and unlock the potential of Decisions by building hard-hitting solutions quickly.

Coaching and Mentorship—Ongoing assistance with architecture, best practices, and team enablement to make your Decisions implementation a success.

Schedule a consultation today!



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