

# Objective

## USER GUIDE

## KEYSTONE FILLABLE FORMS

Create PDF Fillable Forms  
With Objective Keystone

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**Objective** KEYSTONE

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## BACKGROUND

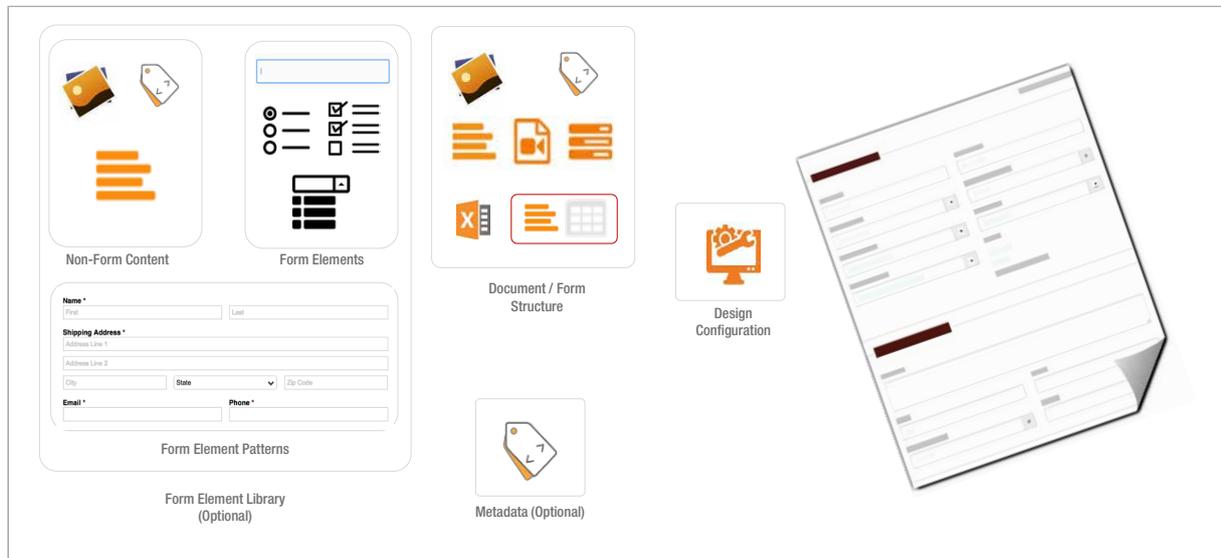
Objective Keystone includes the option to produce documents that contain editable (or fillable) form elements . This guide outlines;

- The required components that make up the framework to include fillable form elements in documents,
- Preparing form elements into reusable patterns to prepare a forms library,
- The available form fields that can be included in a document, and
- How to publish documents with fillable form elements.

### Notes:

- This guide is for experienced users of Keystone and assumes a level of knowledge of how Keystone documents are prepared and edited.
- It is assumed that your environment has the requisite publishing template installed and applied to documents that will have form elements applied. Refer to **Publishing Documents with Form Elements** in this document. Contact your Objective Account Representative if you require further information on publishing templates that support the forms capability.
- If you are not familiar with some of the terminology or features described in this guide, please consult the available product help resources and documentation.

## SOLUTION FRAMEWORK



There are several Keystone components that make up the framework that is required to produce documents with fillable form elements:

- **Non-Form Content:** This can be simple text and tables or even reusable content<sup>1</sup>.
- **Form Elements:** Various question types and form fields can be added to the document including;
  - **Text Fields:** Single or multi-line fields to capture, name, address, phone details.
  - **Select Lists:** Select from a drop-down list of options.
  - **Checkboxes:** Tick / cross boxes to select multiple applicable items from a list.
  - **Radio Buttons:** Tick / cross boxes to select a single item from a list
  - **Character Fields:** A text box for each value in an entry; e.g. a text box per value of a contact number
- **Form Element Patterns:** Optional but can aid development. Repeated groupings of fields can be saved. using the same principle as *Reusable Contents*<sup>1</sup> to combine a series of related form elements. For example; address blocks, account details, etc
- **Form Element Library:** A document specifically set up to organise and maintain form patterns, similar to a *Clause Bank* document but for forms<sup>2</sup>.

In addition to the components above, more traditional Keystone components can be combined to produce documents that contain fillable form elements including;

- **Clause Bank / Reusable Content:** If you have a current *Clause Bank*<sup>2</sup>, or any *Reusable Content*<sup>1</sup>, you can include these within form documents.
- **Metadata:** *Dynamic Documents* using Stakeholder / Consultee, or Asset metadata can be included with form documents. For information on *Dynamic Documents*, or metadata please refer to Keystone help and related guides.
- **Design Configuration:** The *Publishing Settings* (specification) can be adjusted to meet design requirements, for example; page background colours, multiple columns or unique table designs. For information on *Publishing Settings* please refer to Keystone help and related guides.

<sup>1</sup> For additional information on *Reusable Content* refer to Keystone Help and related guides.

<sup>2</sup> For additional information on *Clause Bank* documents refer to related guides or contact your Objective Account Representative.

# FORM ELEMENT LIBRARY

## Form Elements

In order to produce a PDF with fillable form elements, the following form fields are available:

1. **Text**; Single and multi-line
2. **Select**; Single and multi-Select
3. **Checkbox**
4. **Radio**
5. **Character**
6. **Button**<sup>1</sup>

This section outlines each of these form element types. Later sections provide instruction on how to apply.

**Note:**

Form designs appearing in this guide are for example purposes only. The publishing settings provide a range of design options to style form elements. Refer to the **Form Specific Publishing Settings** section of this document.

## Text Fields

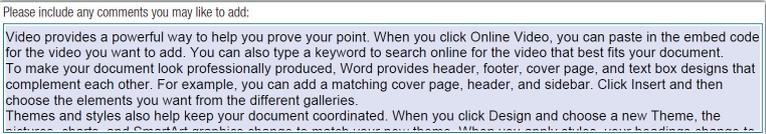
### Single Line

Outputs a simple text field. Suitable for textual fields such as name, address, phone. Option to set a specific width, character limit or auto width.

Attributes	Example of Output
<ul style="list-style-type: none"> <li>Width</li> <li>ID</li> <li>Label</li> <li>Type</li> <li>Default Value</li> <li>Maximum Length</li> </ul>	

### Multiple Lines

Use multi-line text fields for blocks of text to be provided on the form. In addition to specific widths, a height can be set. When entering text scroll bars will display if the content provided is larger than the area displayed in the form.

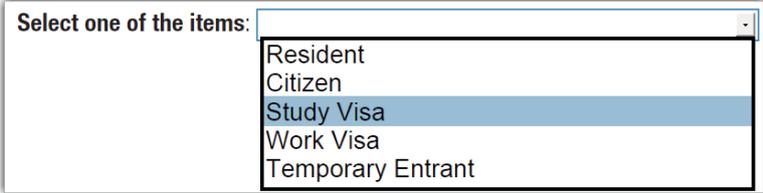
Attributes	Example of Output
<ul style="list-style-type: none"> <li>Width</li> <li>Height</li> <li>ID</li> <li>Label</li> <li>Type</li> <li>Default Value</li> <li>Maximum Length</li> </ul>	

<sup>1</sup> The button element can be configured to submit a completed form. This feature requires additional configuration and may not be supported by your organisation, contact you Objective Account Manager if you require additional information on this capability.

## Select Lists

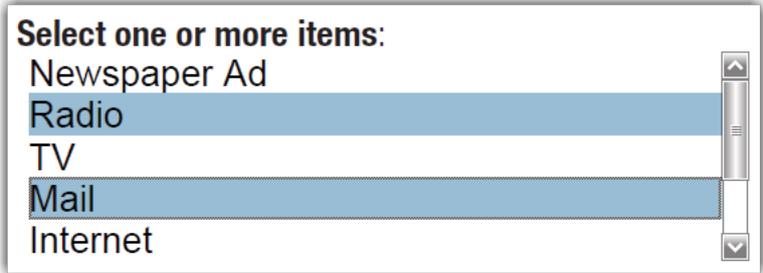
### Single Select

When the responder is required to select one item from a specific list of options, a single select field can be included.

Attributes	Example of Output
<ul style="list-style-type: none"> <li>• Width</li> <li>• ID</li> <li>• Label</li> <li>• Type</li> <li>• Default Value</li> <li>• Placeholder Value</li> <li>• Option 1, Option 2, etc.</li> </ul>	

### Multiple Select

When the responder is required to select one or more items from a specific list of options, a multi select field can be included.

Attributes	Example of Output
<ul style="list-style-type: none"> <li>• Width</li> <li>• Height</li> <li>• ID</li> <li>• Label</li> <li>• Type</li> <li>• Default Value</li> <li>• Option 1, Option 2, etc.</li> </ul>	

## Checkboxes

Create a list of options where one or more items can be selected.

Attributes	Example of Output
<ul style="list-style-type: none"> <li>• Width</li> <li>• ID</li> <li>• Label</li> <li>• Type</li> <li>• Default Value</li> </ul>	

## Radio Buttons

Create a list of options where only one of the items can be selected.

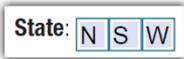
Attributes	Example of Output
<ul style="list-style-type: none"> <li>• Width</li> <li>• ID</li> <li>• Label</li> <li>• Type</li> <li>• Default Value</li> <li>• Group</li> </ul>	

## Character Fields

When each character requires a field. Character fields can be configured in one of two ways:

- **Character per field.** Enter a character in each field, the tab key can be used to move through fields, or
- **Comb field:** Type as per normal and each character will be added to a field in turn.

**Note:**  
Publishing settings determine if character fields function as character per field or as a comb field. Refer to the **Form Specific Publishing Settings** section of this document.

Attributes	Example of Output
<ul style="list-style-type: none"> <li>• Width</li> <li>• ID</li> <li>• Label</li> <li>• Type</li> <li>• Default Value</li> <li>• Placeholder Value</li> </ul>	

## Form Button

Include a button in the form to complete an action. Additional configuration required to use this feature.

**Note:**  
Contact your Objective Account Representative to find out more about form buttons,

Attributes	Example of Output
<ul style="list-style-type: none"> <li>• Width</li> <li>• Height</li> <li>• ID</li> <li>• Label</li> <li>• Type</li> <li>• URL</li> </ul>	

## Form Patterns

Contact Details		
Title:	<input type="text"/>	First Name: <input type="text"/> Last Name: <input type="text"/>
Street Number:	<input type="text"/>	Street Name: <input type="text"/> Town / City: <input type="text"/>
Country:	<input type="text"/>	Post Code: <input type="text"/>

A form pattern is a combination of text, checkbox, radio button fields (and more), used to create a standard collection of elements in a Form. For example:

- Contact details / address blocks
- Person details, title, first or last name
- Account number
- Signature blocks with date fields

### Form patterns best practice:

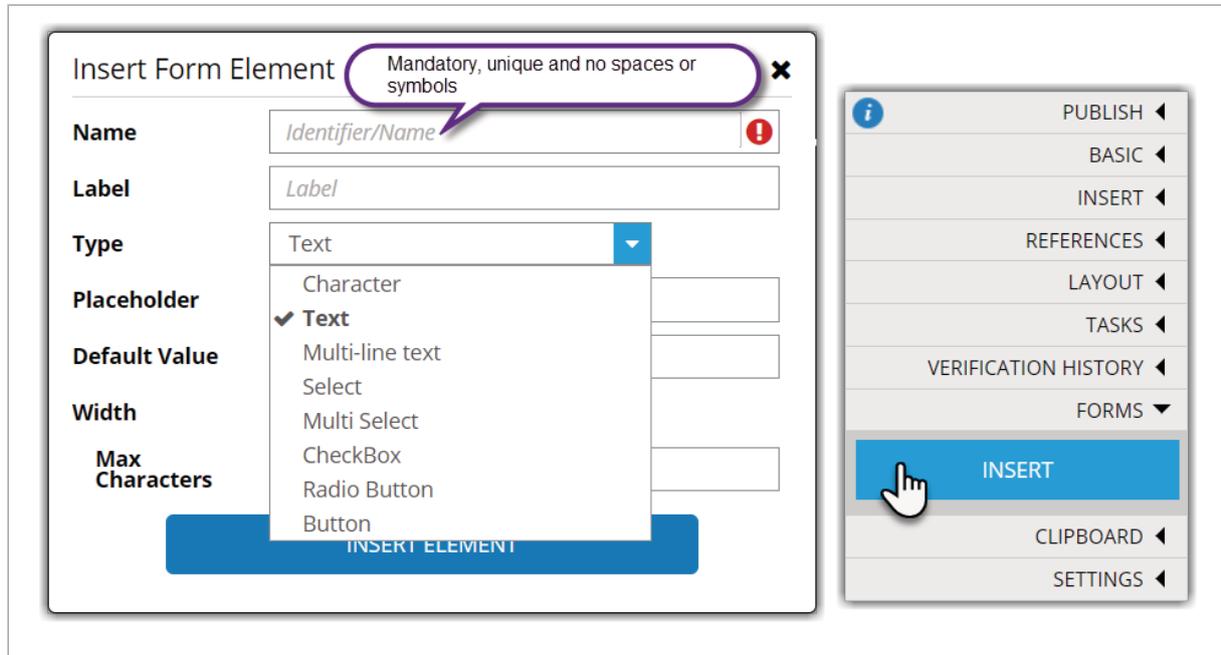
- **Identify Patterns.** Where possible form patterns should be identified. In a similar way common content is identified for reuse, form patterns should be assessed for consistency and reusability - where possible.
- **Standardise.** Attempt to standardise (where possible) and create consistent form patterns - in some cases multiple form patterns may be required to provide flexibility, but this should be minimised.
- **Naming conventions.** Content names for form patterns should be kept unique. To distinguish form pattern names from other reusable content consider a prefix of 'FORM' or something appropriate.
- **Unique Names.** Form elements require a unique name (or group name for radio buttons), these cannot be reused. Consider reusability of patterns and possible repetition of patterns in the same form / page.
- **Content Item Per Pattern.** Use a content item per form pattern in the form library. The publishing process utilises the content ID to further identify the pattern at publish time. This is required to make each field unique. If multiple reused form patterns are used in same content item the fillable elements will not function as expected in the completed output.
- **Layout Form Fields:** Tables can be used to create form patterns. If a combination of tables and paragraphs are used on the same page the design may not look consistent. Also consider reusability, a table may only work in some cases but not others, for example a two column layout.

#### Note:

For additional guidance and advice on approaches to preparing forms, contact your Objective Account Representative.

## INSERTING FORM ELEMENTS

This section outlines how each form element type can be applied within content to create form patterns or to simply add a fillable fields to a document.



The steps to insert any form field begins with the following steps.

### With a content item in *Edit Mode*:

1. Place the cursor where the form field is required, for example, paragraph, table cell, within a box.
2. Expand the **FORMS** Action Menu.
3. Select **INSERT** to display the *Insert Form Element* pop-up window.
4. Select from the available options to create a form field. The form element **Type** selected determines the additional options available, but every element will have:
  - **Name:** Mandatory, unique and must have no spaces or special characters. Some examples; *FirstName*, *First\_Name*, *Address1*, etc.
  - **Label:** Optional and only applicable for some field types.
  - **Type:** Select an element type. Additional options will appear depending on the type selected.

## Editing Form Fields

Once a form element is created it can be edited if you need to adjust any options applied:

1. To edit an existing field; place the cursor in the field tag and from the **FORMS** Menu select **EDIT** to open the *Edit Form Element* pop-up window.
2. Make the required changes, and select **UPDATE ELEMENT** to apply any changes



The remainder of this section includes a summary of each field type and the available options.

## Insert Text Fields

### Insert Single Line Text Fields

The screenshot shows the 'Insert Form Element' dialog box with the following configuration:

- Name:** 1. FirstName
- Label:** 2. Label
- Type:** 3. Text
- Placeholder:** 4. First Name
- Default Value:** 5. Default Value
- Width:** 6. Character Count
- Field Width:** 7. Full Width
- Max Characters:** 8. Enter Max Value Length
- Button:** 9. INSERT ELEMENT

The **Editor:** section shows two preview boxes:

- 20 Character limit, with placeholder:** First Name: TEXT (20): First\_Name
- Full width, with default text:** Last Name: TEXT (Full): LastName

The **Result:** section shows the rendered output:

- 20 Character limit, with placeholder:** First Name: Provide First Name
- Full width, with default text:** Last Name: Last or Family Name

#### From the *Insert Form Element* Pop-up:

1. Provide a **Name** for the field, observing unique name and syntax requirements.
2. The **Label** has no function for Text fields and can be ignored.
3. Set the field **Type** to **Text**.
4. Include any **Placeholder** text. This is optional but can be used if a specific syntax is required, for example a date format; DD Mmmm YYYY
5. To present the field with text already completed use the **Default Value**. This can be adjusted in the form once published.
6. The **Width** option has two settings
  - a. **Full Width** (default), will publish the field so it uses all the available space in a page, column, table cell, etc. When combined in tables any column width will adjust the field to match. This is the recommended setting for most text fields.
  - b. **Character Count**. To specify a specific size the field can be limited in length by the number of characters. If the field is filled with more than the allowed character size the content will just scroll, i.e. it does not set a limit on the number of characters that can be typed, it is for presentation only.
7. **Field Width** will only appear when the **Width** is set to **Character Count**, provide the number of characters to limit the displayed size of this field.
8. **Max Characters** sets a limit on how much content can be included in the field. For example; phone number, account number, etc. can be set to only allow a set number of characters.
9. Select **INSERT ELEMENT** to complete the action and add the field.

#### Note:

If the **Width** is set to **Character Count** and a **Field Width** value is provided, but the setting is adjusted back to **Full Width** the field will retain the **Field Width** value and may affect the result. To resolve, remove any values from the **Max Characters** option before setting the field back to **Full Width**.

## Insert Multi-line Text Fields

The screenshot shows the 'Insert Form Element' dialog box on the left and the resulting form field on the right. The dialog box has the following fields:

- Name:** Further\_Comments (1)
- Label:** Label (2)
- Type:** Multi-line text (3)
- Placeholder:** Placeholder Value (4)
- Default Value:** Default Value (5)
- Width:** Full Width (6)
- Max Characters:** Enter Max Value Length (7)
- Height:** 3 (8)

At the bottom of the dialog is an 'INSERT ELEMENT' button (9). On the right, the 'Editor' shows the label 'Any Further Comments:' followed by a small preview of the multi-line text field. Below that, the 'Result' shows the final rendered form field with the label 'Any Further Comments:' and a large multi-line text box.

### From the *Insert Form Element* Pop-up:

1. Provide a **Name** for the field, observing unique name and syntax requirements.
2. The **Label** has no function for Multi-line Text fields and can be ignored.
3. Set the field **Type** to **Multi-line text**.
4. Include any **Placeholder** text. This is optional but can be used if a specific syntax is required, for example a date format; DD Mmmm YYYY
5. To present the field with text already completed use the **Default Value**. This can be adjusted in the form.
6. The **Width** option has two settings
  - a. **Full Width** (default), will publish the field so it uses all the available space in a page, column, table cell, etc. When combined in tables any column width will adjust the field to match. This is the recommended setting for most multi-line text fields.
  - b. **Character Count**. To specify a specific size the field can be limited in length by the number of characters. If the field is filled with more than the allowed character size the content will just scroll, i.e. it does not set a limit on the number of characters that can be typed, it is for presentation only.
7. **Max Characters** sets a limit on how much content can be included in the field. For example; to keep comments brief, i.e. 200 character limit.
8. **Height** will set the displayed height of the text box. The value provided here is dependent on publishing settings applied for this form element. For example; if the publishing template has the height set to 5mm and the value for **Height** is set to 3 then the field will be approximately 15mm in height when published.
9. Select **INSERT ELEMENT** to complete the action and add the field.

### Note:

If the **Width** is set to **Character Count** and a **Field Width** value is provided, but the setting is adjusted back to **Full Width** the field will retain the **Field Width** value and may affect the result. To resolve, remove any values from the **Max Characters** option before setting the field back to **Full Width**.

## Insert Select Fields

The screenshot shows the 'Insert Form Element' dialog box on the left and the resulting form field on the right. The dialog box has the following fields:

- Name:** PreferredContact (1)
- Label:** Label (2)
- Type:** Select (3)
- Placeholder:** Placeholder Value (4)
- Width:** Full Width (5)
  - Full Width (6) - selected
  - Character Count
- isDefault:**
  - Phone
  - Email (7) - selected
  - Post
- Actions:** Add, Delete, Move Down, Move Up

The **Editor:** shows 'Preferred Contact Method: SELECT ( Full ): PreferredContact'.

The **Result:** shows the rendered form field 'Preferred Contact Method:' with a dropdown menu containing 'Email', 'Phone', 'Email', and 'Post'.

### From the *Insert Form Element* Pop-up:

- Provide a **Name** for the field, observing unique name and syntax requirements.
- The **Label** has no function for Select fields and can be ignored.
- Set the field **Type** to **Select** or **Multi Select** - the same options are available for both element types
- Placeholder** text has no function for select fields and can be ignored
- The **Width** option has two settings
  - Full Width** (default), will publish the field so it uses all the available space in a page, column, table cell, etc. When combined in tables any column width will adjust the field to match. This is the recommended setting for most select fields.
  - Character Count.** To specify a visible size the field can be limited in length by the number of characters. If selected, provide a value in the **Character Count** option that appears to set a displayed size for this field
- The first entry in the list will be empty. Use the following **Actions** to edit this list:
 

Action	Description
	<b>Add:</b> Add a new option
	<b>Delete:</b> Delete the option
	<b>Move Down:</b> Move the option down the list
	<b>Move Up:</b> Move the option up the list
- If a default option is required this can be set by selecting the *Radio* button under **isDefault** for the preferred option. This option will be selected when the form is opened.

### Note:

Once an item is selected as a default it cannot be *unset*. Either set a new default or delete this option and recreate.

- Select **INSERT ELEMENT** to complete the action and add the select form element.

## Insert Checkbox Fields

**Edit Form Element**

**Name** 1 newspaper\_ad

**Label** 2 Label

**Type** 3 CheckBox

**Width** 4 Character Count

**Field Width** 5 1

**Default Selected?** 6

7 UPDATE ELEMENT

**Editor:**

**How did you hear about us:**

CHECKBOX ( 1 ): newspaper\_ad Newspaper Ad

CHECKBOX ( 1 ): radio Radio

CHECKBOX ( 1 ): tv TV

**Result:**

**How did you hear about us:**

Newspaper Ad

Radio

TV

Checkbox fields can be singular, for example;  Check this box if you have read the terms and conditions

Or they can be compiled into a list that requires one or more items to be selected. For a list of checkboxes the steps below need to be repeated for each option in the list that responders can select from.

### From the *Insert Form Element* Pop-up:

1. Provide a **Name** for the field, observing unique name and syntax requirements.
2. The **Label** has no function for checkbox fields and can be ignored.
3. Set the field **Type** to **CheckBox**.
4. The **Width** option has two settings, **Character Count** is recommended for checkbox fields:
  - a. **Full Width** (default), will publish the field so it uses all the available space in a page, column, table cell, etc. When combined in tables any column width will adjust the field to match.
  - b. **Character Count**. To specify a visible size the field can be limited in length by the number of characters. If selected, provide a value in the **Character Count** option that appears to set a displayed size for this field. This is the recommended setting for checkBox fields with a **Field Width** set to **1**.
5. Set the **Field Width** to 1 character.
6. If required, one of the fields in the group can be tagged as the **Default Selected** option and will show as selected when the form is opened.
7. Select **INSERT ELEMENT** to complete the action and add the checkbox form element.
8. Repeat this process to add additional options in the list.

## Insert Radio Fields

The screenshot illustrates the process of creating radio fields in the Objective software. It is divided into three main sections:

- Insert Form Element:** A dialog box with the following fields:
  - Name:** Age\_30to50 (Step 1)
  - Label:** Label (Step 2)
  - Type:** Radio Button (Step 3)
  - Group Name:** Age (Step 4)
  - Width:** Character Count (Step 5)
  - Field Width:** 1 (Step 6)
  - Default Selected?:** Unchecked checkbox
  - INSERT ELEMENT:** A blue button with a red '7' (Step 7)
- Editor:** Shows the resulting radio buttons in the form:
  - RADIO ( 1 ): Age\_Under30 Under 30
  - RADIO ( 1 ): Age\_30to50 30 to 50
  - RADIO ( 1 ): Age\_Over50 Over 50
- Result:** Shows the final rendered form:
  - Age Range:
  - Under 30
  - 30 to 50
  - Over 50

Radio fields are unique in that they are made up of a group of multiple form elements. A *Group Name* links the form elements together so that only 1 field can be selected. The steps below need to be repeated for each option in the list that responders can select from.

### From the *Insert Form Element* Pop-up:

1. Provide a **Name** for the field, observing unique name and syntax requirements.
2. The **Label** has no function for radio fields and can be ignored.
3. Set the field **Type** to **Radio Button**.
4. A **Group Name** is required for radio form fields and should be the same for every field created that makes up the selection list.

### TIP:

Use the **Group Name** in the **Field Name** to ensure that this element belongs to this grouping. It will show when viewed from the editor and will avoid confusion if the content item contains multiple radio elements.

5. The **Width** option has two settings, **Character Count** is recommended for radio fields:
  - a. **Full Width** (default), will publish the field so it uses all the available space in a page, column, table cell, etc. When combined in tables any column width will adjust the field to match.
  - b. **Character Count**. To specify a visible size the field can be limited in length by the number of characters. If selected, provide a value in the **Character Count** option that appears to set a displayed size for this field. This is the recommended setting for radio fields with a **Field Width** set to **1**.
6. Set the **Field Width** to 1 character and, If required, one of the fields in the group can be tagged as the **Default Selected** option and will show as selected when the form is opened.
7. Select **INSERT ELEMENT** to complete the action and add the checkbox form element.
8. Repeat this process for each additional option in the list ensuring that the **Group Name** is the same for all options.

## Insert Character Fields

The screenshot illustrates the process of inserting a character field. On the left, the 'Insert Form Element' dialog box is shown with the following configuration:

- Name:** AccountNumber
- Label:** Label
- Type:** Character
- Placeholder:** Placeholder Value
- Default Value:** Default Value
- Width:** Character Count
- Field Width:** 8

The 'Editor' view shows the field configuration as: Account Number: CHAR ( 8 ): AccountNumber. The 'Result' view shows the rendered field: Account Number: [1][2][4][5][6][7][ ][ ]

### From the *Insert Form Element* Pop-up:

1. Provide a **Name** for the field, observing unique name and syntax requirements.
2. The **Label** has no function for checkbox fields and can be ignored.
3. Set the field **Type** to **Character**.
4. Include any **Placeholder** text. This is optional but can be used if a specific syntax is required, for example a date format; DD Mmmm YYYY.
5. To present the field with text already completed use the **Default Value**. This can be adjusted in the form when published.
6. The **Width** option has two settings, **Character Count** is required for character fields:
  - a. **Full Width** (default), Not Suitable for character fields
  - b. **Character Count**. To specify the number of character fields.
7. Set the **Field Width** to the number of characters the field requires.
8. Select **INSERT ELEMENT** to complete the action and add the character form element.

## Insert Button Fields

The screenshot illustrates the process of inserting a button field. On the left, the 'Insert Form Element' dialog box contains the following configuration:

- Name:** Submit\_Button (1)
- Label:** SUBMIT FORM (2)
- Type:** Button (3)
- Width:** Full Width (4)
- Height:** 3 (5)
- URL:** www.objective.com (6)
- INSERT ELEMENT:** (7)

The **Editor** view shows a button element labeled 'BUTTON ( Full ): Submit\_Button'. The **Result** view shows the rendered button with the text 'Submit' and a tooltip that reads 'Send the data to \$formField/@url'.

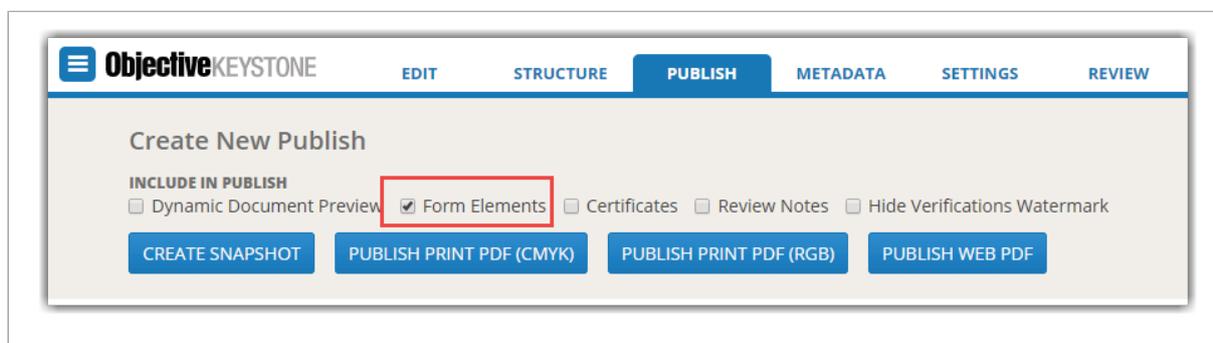
### From the *Insert Form Element* Pop-up:

1. Provide a **Name** for the button, observing unique name and syntax requirements.
2. The **Label** is designed to show the Button Text, but at time of writing, this defaults to 'Submit'.
3. Set the field **Type** to **Button**.
4. The **Width** option has two settings:
  - a. **Full Width** (default), will publish the button so it uses all the available space in a page, column, table cell, etc. When combined in tables any column width will adjust the button to match.
  - b. **Character Count**. To specify a specific size the button can be limited in length by the number of characters.
5. The **Height** has no effect on this form element.
6. Provide the site url that will receive the form data. The Website must be one that supports receiving from data via PDF. For additional information on submission of PDF forms, please contact the relevant department in your organisation.
7. Select **INSERT ELEMENT** to complete the action and add the button.

### Notes:

- If the **Width** is set to **Character Count** and a **Field Width** value is provided, but the setting is adjusted back to **Full Width** the field will retain the **Field Width** value and may affect the result. To resolve, remove any values from the **Max Characters** option before setting the field back to **Full Width**.
- At time of writing, there are no specific formatting controls for the **Button** element.
- Please contact your Objective Account Representative if you require the use of the button form element.

## PUBLISHING DOCUMENTS WITH FORM ELEMENTS



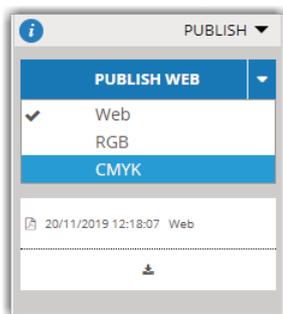
Keystone documents with form elements are published as per any other Keystone document, with one small difference.

### From the Open Document / PUBLISH Tab:

1. Before selecting a publishing preference, check **Form Elements** from the **INCLUDE IN PUBLISH** options.
2. Select the required output type. When completed the the form elements will be editable in the resulting PDF.

### Notes:

- If the **Form Elements** option is not specified the document will still publish but the form elements will not be editable. This can be a useful option when the document is only being published to test the design / layout.
- If the form has several pages it may take slightly more time to produce an output when the **Form Elements** option is selected.
- If the document is also *Dynamic*, a suitable *Stakeholder* must be provided to complete the publish. Refer to online help and relevant documents for additional information on *Dynamic Documents*.
- The **PUBLISH Action Menu** provides a shortcut to publish a document. If this feature is used for documents with form elements, the form elements will not be fillable.



# FORM SPECIFIC PUBLISHING SETTINGS

## IMPORTANT:

- A certain level of experience is assumed and these settings should only be adjusted by those with the correct level of access and who are familiar with the **SETTINGS** interface. If you require help and advice on configuring these settings or any other settings, please contact your Objective Account Representative.
- This section covers publishing settings for form elements only. For any other settings, refer to related documentation.
- Only adjust the values as required, in many cases the system defaults should provide the optimum settings.

Setting	Options	Description
<b>Forms Report</b>		
<b>Generate Forms Report</b>	Yes / No	To assist in debugging forms, a report can be run that summarises the form elements appearing in the document and will identify any issues. Refer to <b>Forms Report</b> under the <i>Troubleshooting</i> section of this document.
<b>Character Forms</b>		
<b>Use Character Forms as Comb Forms</b>	Yes / No	When set to <b>Yes</b> , the character fields are combined as one field so that when content is entered the cursor moves from one character to the next as you type. When set to <b>No</b> , each character must be entered into each field. To make this easier the tab key can be used to move from one character to the next.
<b>Form Character Border Width (pt)</b>		Border / line thickness around each character, measured in points.
<b>Form Character Border Style</b>	None, Dotted, Dashed, Solid, Double, Groove, Ridge	Optional line presentation. Requires <b>Border Width</b> , above, to be set. Default is <b>None</b> <sup>†</sup> .
<b>Form Character Border Colour</b>	CMYK: 0%, 0%, 0% (RGB: #, #, #)	Colour of field border. Requires <b>Border Width</b> , above, to be set.
<b>Form Character Background Colour</b>	CMYK: 0%, 0%, 0% (RGB: 255, 255, 255)	Colour of the field <sup>††.†††</sup> .
<b>Form Character Length (mm)</b>		How wide is a character field measured in mm
<b>Form Character Height (mm)</b>		How high is a character field measured in mm. Recommended to make this the same as <b>Length</b> , above.

Setting	Options	Description
<b>Form Character Left Margin (mm)</b>		When text is entered, how close to the left edge will it appear
<b>Form Character Right Margin (mm)</b>		When text is entered, how close to the right edge will it appear
<b>Form Character Space between Character Boxes (mm)</b>		How much space between character fields. No value will place the fields next to each other.
<b>Form Character Vertical Alignment</b>	Manual (use % setting below, Baseline, Sub, Super, Middle, Top, Bottom, Text Bottom, Text Top	How the text is aligned vertically in the character field.
<b>Form Character Manual Vertical Align (-/+ %)</b>		If the <i>Manual</i> option is selected above, this value must be provided.
<b>Form Character Fill Font Family</b>	Courier New, Helvetica (Default), Times New Roman, Symbol, ITC Zapf Dingbats	Font for text entered in character field.
<b>Form Character Fill Font Size (pt)</b>		Font size of character field text.
<b>Form Character Fill Line Height (pt)</b>		Line height for character field text.
<b>Form Character Fill Text Colour</b>	CMYK: 0%, 0%, 0% (RGB: #, #, #)	Colour of character field text.
<b>Text Forms</b>		
<b>Use Text Forms as Comb Forms</b>	Yes / No <sup>iv</sup> .	When set to <b>Yes</b> , the character fields are combined as one field so that when content is entered the cursor moves from one character to the next as you type. When set to <b>No</b> , each character must be entered into each field. To make this easier the tab key can be used to move from one character to the next.
<b>Form Text Border Width (pt)</b>		Border / line thickness around each character, measured in points.
<b>Form Text Border Style</b>	None, Dotted, Dashed, Solid, Double, Groove, Ridge	Optional line presentation. Requires <b>Border Width</b> , above, to be set. Default is <b>None</b> <sup>i</sup> .
<b>Form Text Border Colour</b>	CMYK: 0%, 0%, 0% (RGB: #, #, #)	Colour of field border. Requires <b>Border Width</b> , above, to be set.
<b>Form Text Background Colour</b>	CMYK: 0%, 0%, 0% (RGB: 255, 255, 255)	Colour of the field <sup>ii,iii</sup> .
<b>Form Text Value Length(mm)</b>		How wide is a text field measured in mm.
<b>Form Text Height(mm)</b>		How high is a text field measured in mm.
<b>Form Text Left Margin (mm)</b>		When text is entered, how close to the left edge will it appear.

Setting	Options	Description
<b>Form Text Right Margin (mm)</b>		When text is entered, how close to the right edge will it appear.
<b>Form Text Top Margin (mm)</b>		When text is entered, how close to the top edge will it appear.
<b>Form Text Bottom Margin (mm)</b>		When text is entered, how close to the bottom edge will it appear.
<b>Form Text Vertical Alignment</b>	Manual (use % setting below, Baseline, Sub, Super, Middle, Top, Bottom, Text Bottom, Text Top)	How the text is aligned vertically in the field.
<b>Form Text Manual Vertical Align (+/- %)</b>		If the <i>Manual</i> option is selected above, this value must be provided.
<b>Form Text Fill Font Family</b>	Courier New, Helvetica (Default), Times New Roman, Symbol, ITC Zapf Dingbats	Font for text entered in the field.
<b>Form Text Fill Font Size (pt)</b>		Font size of text entered in the field.
<b>Form Text Fill Line Height (pt)</b>		Line height for text entered in the field.
<b>Form Text Fill Text Colour</b>	CMYK: 0%, 0%, 0% (RGB: #, #, #)	Colour of text entered in the field.

Setting	Options	Description
<b>Multiline Forms</b>		
<b>Form Multiline Border Width (pt)</b>		Border / line thickness around each character, measured in points.
<b>Form Multiline Border Style</b>	None, Dotted, Dashed, Solid, Double, Groove, Ridge	Optional line presentation. Requires <b>Border Width</b> , above, to be set. Default is <b>None</b> <sup>i.</sup> .
<b>Form Multiline Border Colour</b>	CMYK: 0%, 0%, 0% (RGB: #, #, #)	Colour of field border. Requires <b>Border Width</b> , above, to be set.
<b>Form Multiline Background Colour</b>	CMYK: 0%, 0%, 0% (RGB: 255, 255, 255)	Colour of the field <sup>ii.</sup> <sup>iii.</sup>
<b>Form Multiline Length (mm)</b>		How wide is a multi-line field measured in mm.
<b>Form Multiline Height (mm)</b>		How high is a multi-line field measured in mm.
<b>Form Text Vertical Alignment</b>	Manual (use % setting below, Baseline, Sub, Super, Middle, Top, Bottom, Text Bottom, Text Top	How the text is aligned vertically in the multi-line field.
<b>Form Text Manual Vertical Align (+/- %)</b>		If the <i>Manual</i> option is selected above, this value must be provided.
<b>Form Multiline Left Margin (mm)</b>		When text is entered, how close to the left edge will it appear.
<b>Form Multiline Right Margin (mm)</b>		When text is entered, how close to the right edge will it appear.
<b>Form Multiline Top Margin (mm)</b>		When text is entered, how close to the top edge will it appear.
<b>Form Multiline Bottom Margin (mm)</b>		When text is entered, how close to the bottom edge will it appear.
<b>Form Multiline Fill Font Family</b>	Courier New, Helvetica (Default), Times New Roman, Symbol, ITC Zapf Dingbats	Font for multi-line field text entered into form.
<b>Form Multiline Fill Font Size (pt)</b>		Font size of multi-line field text.
<b>Form Multiline Fill Line Height (pt)</b>		Line height for multi-line field text.
<b>Form Multiline Fill Text Colour</b>		Colour of multi-line field text.

Setting	Options	Description
<b>Radio Forms</b>		
<b>Radio Character</b>	● ■ → ➔ ▶ ✓ ✓ ✕ ✕ ✕ ✕	Symbol used when radio field is selected in the form.
<b>Radio Border Width (pt)</b>	CMYK: 0%, 0%, 0% (RGB: #, #, #)	Border / line thickness around each character, measured in points.
<b>Radio Border Style</b>	None, Dotted, Dashed, Solid, Double, Groove, Ridge	Optional line presentation. Requires <b>Border Width</b> , above, to be set. Default is <b>None</b> <sup>†</sup> .
<b>Form Radio Border Colour</b>	CMYK: 0%, 0%, 0% (RGB: #, #, #)	Colour of field border. Requires <b>Border Width</b> , above, to be set.
<b>Form Radio Background Colour</b>	CMYK: 0%, 0%, 0% (RGB: 255, 255, 255)	Colour of the field <sup>†,‡,¶</sup> .
<b>Form Radio Length (mm)</b>		How wide is a radio field measured in mm.
<b>Form Radio Height (mm)</b>		How high is a radio field measured in mm. Recommended to make this the same as <b>Length</b> , above.
<b>Form Radio Left Margin (mm)</b>		When selected, gap between symbol and left edge.
<b>Form Radio Right Margin (mm)</b>		When selected, gap between symbol and right edge.
<b>Form Radio Top Margin (mm)</b>		When selected, gap between symbol and symbol appears.
<b>Form Radio Bottom Margin (mm)</b>		When selected, gap between symbol and symbol appears.
<b>Form Radio Vertical Alignment</b>		How the symbol is aligned vertically in the field.
<b>Form Radio Manual Vertical Align</b>	Manual (use % setting below, Baseline, Sub, Super, Middle, Top, Bottom, Text Bottom, Text Top)	If the <i>Manual</i> option is selected above, this value must be provided.
<b>Form Radio Fill Font Size</b>		Font size of symbol when the field is selected.
<b>Form Radio Fill Text Colour</b>	CMYK: 0%, 0%, 0% (RGB: #, #, #)	Colour of symbol when the field is selected.

Setting	Options	Description
<b>Check Forms</b>		
<b>Check Character</b>	● ■ → ➔ ▶ ✓ ✓ ✕ ✕ ✕ ✕	Symbol used when checkbox field is selected in the form.
<b>Check Border Width</b>		Border / line thickness around each character, measured in points.
<b>Check Border Style</b>	None, Dotted, Dashed, Solid, Double, Groove, Ridge	Optional line presentation. Requires <b>Border Width</b> , above, to be set. Default is <b>None</b> <sup>1</sup> .
<b>Form Check Border Colour</b>	CMYK: 0%, 0%, 0% (RGB: #, #, #)	Colour of field border. Requires <b>Border Width</b> , above, to be set.
<b>Form Check Background Colour</b>	CMYK: 0%, 0%, 0% (RGB: 255, 255, 255)	Colour of the field <sup>ii,iii</sup> .
<b>Form Check Length</b>		How wide is a checkbox field measured in mm.
<b>Form Check Height</b>		How high is a checkbox field measured in mm. Recommended to make this the same as <b>Length</b> , above.
<b>Form Check Left Margin (mm)</b>		When selected, gap between symbol and left edge.
<b>Form Check Right Margin (mm)</b>		When selected, gap between symbol and right edge.
<b>Form Check Top Margin (mm)</b>		When selected, gap between symbol and top edge.
<b>Form Check Bottom Margin (mm)</b>		When selected, gap between symbol and bottom edge.
<b>Form Check Vertical Alignment</b>	Manual (use % setting below, Baseline, Sub, Super, Middle, Top, Bottom, Text Bottom, Text Top)	How the symbol is aligned vertically in the field.
<b>Form Check Manual Vertical Align</b>		If the Manual option is selected above, this value must be provided.
<b>Form Check Fill Font Size</b>		Font size of symbol when the field is selected
<b>Form Check Fill Text Colour</b>	CMYK: 0%, 0%, 0% (RGB: #, #, #)	Colour of symbol when the field is selected.

Setting	Options	Description
<b>Select Forms</b>		
<b>Form Select Border Width (pt)</b>		Border / line thickness around each character, measured in points.
<b>Form Select Border Style</b>	None, Dotted, Dashed, Solid, Double, Groove, Ridge	Optional line presentation. Requires <b>Border Width</b> , above, to be set. Default is <b>None</b> <sup>i</sup> .
<b>Form Select Border Colour</b>	CMYK: 0%, 0%, 0% (RGB: #, #, #)	Colour of field border. Requires <b>Border Width</b> , above, to be set.
<b>Form Select Background Colour</b>	CMYK: 0%, 0%, 0% (RGB: 255, 255, 255)	Colour of the field <sup>ii,iii</sup> .
<b>Form Select Length(mm)</b>		How wide is a select field measured in mm.
<b>Form Select Height(mm)</b>		How high is a select field measured in mm.
<b>Form Select Left Margin (mm)</b>		How close to the left edge will list items appear
<b>Form Select Right Margin (mm)</b>		How close to the right edge will list items appear.
<b>Form Select Top Margin (mm)</b>		How close to the top edge will list items appear.
<b>Form Select Bottom Margin (mm)</b>		How close to the bottom edge will list items appear.
<b>Form Select Vertical Alignment</b>	Manual (use % setting below, Baseline, Sub, Super, Middle, Top, Bottom, Text Bottom, Text Top	How the text is aligned vertically in the Select field.
<b>Form Select Manual Vertical Align</b>		If the <i>Manual</i> option is selected above, this value must be provided.
<b>Form Select Fill Font Family</b>	Courier New, Helvetica (Default), Times New Roman, Symbol, ITC Zapf Dingbats	Font for list items appearing in the Select field.
<b>Form Select Fill Font Size</b>		Font size for list items appearing in the Select field.
<b>Form Select Fill Line Height</b>		Font line height for list items appearing in the Select field.
<b>Form Select Fill Text Colour</b>	CMYK: 0%, 0%, 0% (RGB: #, #, #)	Font colour for list items appearing in the Select field.

Setting	Options	Description
<b>Multi-Select Forms</b>		
<b>Form Multi-Select Border Width (pt)</b>		Border / line thickness around each character, measured in points.
<b>Form Multi-Select Border Style</b>	None, Dotted, Dashed, Solid, Double, Groove, Ridge	Optional line presentation. Requires <b>Border Width</b> , above, to be set. Default is <b>None</b> <sup>i</sup> .
<b>Form Multi-Select Border Colour</b>	CMYK: 0%, 0%, 0% (RGB: #, #, #)	Colour of field border. Requires <b>Border Width</b> , above, to be set.
<b>Form Multi-Select Background Colour</b>	CMYK: 0%, 0%, 0% (RGB: 255, 255, 255)	Colour of the field <sup>ii,iii</sup> .
<b>Form Multi-Select Length(mm)</b>		How wide is a multi-Select field measured in mm.
<b>Form Multi-Select Height(mm)</b>		How high is a multi-Select field measured in mm.
<b>Forms Multi-Select Left Margin (mm)</b>		How close to the left edge will list items appear
<b>Forms Multi-Select Right Margin (mm)</b>		How close to the right edge will list items appear
<b>Forms Multi-Select Top Margin (mm)</b>		How close to the top edge will list items appear
<b>Forms Multi-Select Bottom Margin (mm)</b>		How close to the bottom edge will list items appear
<b>Form Multi-Select Vertical Alignment</b>	Manual (use % setting below, Baseline, Sub, Super, Middle, Top, Bottom, Text Bottom, Text Top	How the text is aligned vertically in the multi-Select field.
<b>Form Multi-Select Manual Vertical Align</b>		If the <i>Manual</i> option is selected above, this value must be provided.
<b>Form Multi-Select Fill Font Family</b>		Font for list items appearing in the multi-Select field.
<b>Form Multi-Select Fill Font Size</b>		Font size for list items appearing in the multi-Select field.
<b>Form Multi-Select Fill Line Height</b>		Font line height for list items appearing in the multi-Select field.
<b>Form Multi-Select Fill Text Colour</b>	CMYK: 0%, 0%, 0% (RGB: #, #, #)	Font colour for list items appearing in the multi-Select field.

- i. If **Border Width** is set to a lower point size some style types may not show as expected.
- ii. A transparent setting will prevent the field by being detected as fillable when published.
- iii. Depending on the PDF reader settings, the selected colour may not display when published. Recommendation is to set this to White.
- iv. This setting is only relevant if the text element is set to use a character width, Recommendation is to leave this with the default of **No**.

## TROUBLESHOOTING

This section outlines some common issues that you may encounter when working with form elements.

### Using Tables for Form Pattern Layouts

Tables can be combined with form elements to create form patterns, but there are some things to consider. The following is just a few suggestions that might help when using tables and form elements together.

#### Are Tables Necessary?

Tables are only really necessary when specific form patterns are required, where possible place form text and elements outside of tables. Remember the **Full Width** setting factors in any content in a line of text, so a layout like the one below is possible without the use of a table.

Title:	<input type="text"/>	First Name:	<input type="text"/>	Last Name:	<input type="text"/>
--------	----------------------	-------------	----------------------	------------	----------------------

#### Why use Tables?

When a form pattern requires a specific layout, or to make similar form patterns consistent, then a table can help. For example, if a series of fields needs to retain the exact same size the **Character** and **Full Width** options may not achieve the required result, but table column widths can. Set each column width to a percentage so they are uniform. When combined with the **Full Width** setting it is possible to produce a result like the one below.

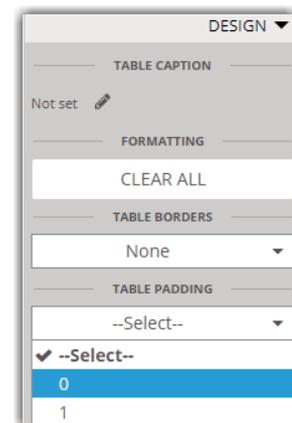
Account One	Account Two	Account three
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

#### Full or Character Width?

With the exception of, checkbox, radio and character fields, a good place to start is to use the default **Full Width** option. Full width will automatically set the correct size for the available area. In the case of tables, the field will fill the space of the cell.

#### Table Design / Lines, Rules and Borders

Table design is a preference, but if you want to use a table to layout a form pattern but do not want the **TABLE BORDERS** to show, then they can be removed, Use the **DESIGN Action Menu**, while there consider the **TABLE PADDING** this will help set a consistent space around form elements.



#### Merged Cells

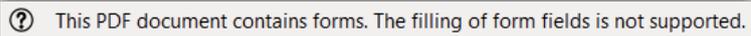
Try to avoid these where possible. When cells are merged it can make it difficult to configure the layout as required. Alternatively create multiple tables.

## Common Challenges

### My Form Fields are not Fillable.

Once published the form field elements are not fillable. Possible Reasons:

- The **Form Elements** option was not applied prior to publish. Check the option is selected and re-publish.
- The PDF viewer (possibly browser viewer) does not support fillable form PDF's. Download the PDF and open in Acrobat Reader or similar.

 This PDF document contains forms. The filling of form fields is not supported.

- Publishing settings are not configured correctly. Publishing options allow for a colour to be applied to a form field background. If this setting has no colour value, i.e. transparent, the element will not be fillable in the PDF.

### My Checkboxes and Radio Buttons are too large when published:

Check that the width is set to **Character Count** and set the **Field Width** value to 1.

### My Checkboxes and Radio Buttons are too small when published:

Check that the width is set to Character Count and set the Field Width value to 1. Also check that the Publishing Settings for these elements are set to a suitable size for *Length* and *Height* - 1mm for example.

## Forms Report

### IMPORTANT:

- The *Form Report* capability requires access to the **SETTINGS** of the document. A setting needs to be enabled to run the report and then disabled when the report details are no longer required. If you do not have access to **SETTINGS** or are unable to access the form report settings, contact your Objective Account Representative.
- Not all issues affecting the form will be captured in the report, but it does help uncover a range of issues and provides feedback on each of the issues it discovers.

To fully evaluate a form for a range of possible issues a report can be requested.

### Enable the Form Report

The screenshot shows the Objective KEYSTONE interface with the 'SETTINGS' tab selected. The 'PDF Template Settings' section is expanded, and the 'Generate Forms Report' option is set to 'Yes'. Red callout numbers 1, 2, 3, and 4 highlight the 'SETTINGS' tab, the 'PDF Template Settings' section, the 'Generate Forms Report' option, and the 'PUBLISH' tab respectively.

#### From the Open Document:

1. Select the **SETTINGS** tab to access the publishing settings for the document.
2. Locate and expand the **PDF Template Settings**.
3. Locate the setting **Form Report \ Generate Forms Report** and edit to set the option to **Yes**
4. Return to the **PUBLISH** tab and publish the document, ensuring to enable the **Form Elements** from the **INCLUDE IN PUBLISH** options.
5. When the publish has completed you will have the form document with the results of the report appended at the end of the document. See an example on the next page.

Count	Content	Name	Label	Type	Placeholder	Default Value	Group Name	Width Type	Field Width	Max Characters	Height	Option Values	Default Selected	URL
1	Contact Details	Last_name		textBox				fullWidth						
2	Contact Details	Street_number		textBox				fullWidth						
3	Contact Details	Street_name		textBox				fullWidth						
4	Contact Details	Town		textBox				fullWidth						
5	Contact Details	Country		textBox				fullWidth						
6	Contact Details	Postcode		textBox				fullWidth						
7	Contact Details	Title		textBox				fullWidth						
8	Contact Details	First_name		textBox				fullWidth						
9	Contact Details	Last_name_1		textBox				fullWidth						
10	Contact Details	First_Name	label for text field	textBox	Provide First Name			charCount	20					
11	Contact Details	First_Name_1		textBox		Last or Family Name		fullWidth						
12	Contact Details	PreferredContact		selectBox	SELECT			fullWidth				Phone Email(default) Post		
13	Contact Details	Further_Comments		textAreaBox				fullWidth			3			
14	Contact Details	Age_Under30		radioBtn		Age	Age	charCount	1				false	
15	Contact Details	Age_30to50		radioBtn		Age	Age	charCount	1				false	
16	Contact Details	Age_Over50		radioBtn		Age	Age	charCount	1				false	
17	Contact Details	AccountNumber		character				charCount	8					
18	Contact Details	Submit_Button	SUBMIT FORM	formBtn				fullWidth			3			www.objective.com
19	Contact Details	Row1_Acc1		textBox				fullWidth						
20	Contact Details	Row1_Acc2		textBox				fullWidth						
21	Contact Details	Row1_Acc3		textBox				fullWidth						
22	Contact Details	Row2_Acc1		textBox				fullWidth						
23	Contact Details	Row2_Acc2		textBox				fullWidth						
24	Contact Details	Row2_Acc3		textBox				fullWidth						
25	Contact Details	Row3_Acc1		textBox				fullWidth						
26	Contact Details	Row2_Acc2_1		textBox				fullWidth						
27	Contact Details	Row3_Acc3		textBox				fullWidth						
28	Checkbox Example	tsandCs		checkboxBox				charCount	1				false	
29	Checkbox Example	newspaper_ad		checkboxBox				charCount	1				false	
30	Checkbox Example	radio		checkboxBox				charCount	1				false	
31	Checkbox Example	tv		checkboxBox				charCount	1				false	
32	Checkbox Example	mail		checkboxBox				charCount	1				false	
33	Checkbox Example	internet		checkboxBox				charCount	1				false	
34	Checkbox Example	word_of_mouth		checkboxBox				charCount	1				false	
35	Checkbox Example	Hear_Comments		textAreaBox				fullWidth			5			
36	Select Lists	Status		selectBox				charCount	20			Resident Citizen Study Visa Work Visa Temporary Entrant		
37	Select Lists	MultiSelect		multiSelectBox				charCount	20		5	Newspaper Ad Radio TV Mail Internet(default) Word of Mouth		
38	Radio Buttons	1_5		radioBtn			Radio	charCount	1				false	
39	Radio Buttons	5_10		radioBtn			Radio	charCount	1				true	
40	Radio Buttons	10_15		radioBtn			Radio	charCount	1				false	
41	Radio Buttons	15Plus		radioBtn			Radio	charCount	1				false	
42	Character Field	State		character				charCount	3					
43	Form Button	Submit	Submit	formBtn				charCount	15		3			www.objective.com

Key / Example	Definition
The same field label applied to more than one elements in the same content item.	Depending on the size of the content item, occurrences usually appear in close proximity to each other. This situation should be rectified, if left it will cause an issue when the field is edited in the resulting PDF
The same field label applied in more than one element on different content items	When this appears in isolated to other fields in the report it is just an indication that the labels is reused, Not a critical issue and would not affect the resulting PDF, this is just to advise there are labels reused.
[default]	Indicates that this option in a select field is marked as the default. Radio or checkbox indicates this with an entry in the <b>Default Selected</b> column of the report