PDF EXPERT

HOW TO SAVE A DOCUMENT

Step 1-when observation is complete

Step 2-select box with arrow in upper right corner

Step 3-click on box with arrow, drop down menu will appear, select Save a Copy
Step 4 - Click on X in top box, name document - Last Name, First Name, Date, Type of Form, Title. Ex: Brown, Suzy 10-8-13, Narrative Form or Generic Form, MT or FI.

Step 5 - Select Document Folder.
Step 6- when you select Documents Folder, a drop down menu will appear, select folder by tapping on it, where you want to save document, then tap on Done, the file name will appear in the Document Box.

Step 7- If this document is complete and you do not want to make any further changes, select file type - Flattened Document.
Step 8- Check to make sure that the name of the document is correct, you have selected the file where the document is to be saved, select File Type, finally select Done

Step 9- To use the original document again you need to clear it. CAUTION MAKE SURE THAT YOU HAVE SAVED OR EMAILED THE DOCUMENT BEFORE YOU CLEAR IT

Created by Bettina Brander 2-13-13
PDF EXPERT

HOW TO EMAIL DOCUMENTS

Step 1 - open completed document

Step 2 - select box with arrow in upper right corner

Step 3 - click on box with arrow, drop down menu will appear, select Send by E-mail
Step 4 - Select Flattened Copy

Step 5 - Add names of people to email document to - Intern & Field Instructor
*Note: Names need to be in contacts or you will need to type in address
Step 6- tap on send

Step 7- To use the original document again you need to clear it CAUTION MAKE SURE THAT YOU HAVE SAVED OR EMAILED THE DOCUMENT BEFORE YOU CLEAR IT