

redUX (redesign UX • re-do • ,ri:'du:)

PDF Printover 

Good 

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Overview

How might we help users build PDF Printovers quicker?

Background

The PDF Printover tool was created to allow power users to add fillable fields to existing PDF documents, making them interactive and easy to complete.

Problem

Due to rapid development, the tool was initially built with only **essential features** and minimal focus on usability.

Now that the core functionality is in place, **enhancing usability** is crucial to boost productivity.

Template Description:

Template name

Placeholders:

Choose...

Template Name

No treating doctor selected

This is the updated layout for the PDF Printover

- Printover

Set PDF file:

Choose File

Test-Form.pdf

Add:

Text

Multiline Text

Image

Signature

Checkbox

Show Field Borders

Lab Order Form – Bloodwork

Practice Name:

Practice Address:

Practice Contact number:

PracName

PracAdd

PracNum

31 Snyman Rd, Brummeria

012 345 6789

Patient Information

Name:

Surname:

Date of birth:

Contact no.:

Requested Tests

Complete Blood Count (CBC)

Basic Metabolic Panel (BMP)

Hemoglobin A1c

Lipid Panel

Thyroid Function Test (TSH)

Search fields...

Show only manual fields

Page: 1

Sort Field Name

Expand All

Add Section

Override All Styling

+ PracName

Text

- PracAdd

Multiline Text

Manually editable

Field Name:

PracAdd

Text:

31 Snyman Rd, Brummeria

Placeholder

Font Family:

Courier

Font Size:

12

Font Style:

B

I

U

S

A

X Coordinate:

0

Y Coordinate:

0

Close

Save

12:30 PM

Better UX Suggestions

Split PDF view from fields, and put fields into their own collapsible and scrollable side panel

The screenshot displays the GoodX Web interface for editing a PDF form. The main area shows a PDF titled "Lab Order Form – Bloodwork" with fields for Practice Name, Address, Contact number, Patient Information, and Requested Tests. A side panel on the right, highlighted with a pink box, contains a search bar, a list of fields (PracName, PracAdd, PracNum), and a detailed configuration section for the selected field (PracAdd). The configuration section includes options for Field Name, Text, Font Family, Font Size, Font Style, X Coordinate, and Y Coordinate. A blue arrow points from the text "Split PDF view from fields" to the main PDF area, and a pink arrow points from the text "put fields into their own collapsible and scrollable side panel" to the side panel.

GoodX Web

www.goodx.web.za

Template Description: Template name

Placeholders: Choose...

Template Name

No treating doctor selected

- Printover

Set PDF file: Choose File Test-Form.pdf

Add: Text Multiline Text Image Signature Checkbox Show Field Borders

Lab Order Form – Bloodwork

Practice Name: PracName

Practice Address: 31 Snyman Rd, Brummeria

Practice Contact number: 012 345 6789

Patient Information

Name: Surname:

Date of birth: Contact no.:

Requested Tests

☐ Complete Blood Count (CBC) ☐ Lipid Panel

☐ Basic Metabolic Panel (BMP) ☐ Thyroid Function Test (TSH)

☐ Hemoglobin A1c

Search fields...

Show only manual fields Page: 1

Sort Field Name Expand All

Add Section Override All Styling

+ PracName Text

- PracAdd Multiline Text

Manually editable

Field Name: PracAdd

Text: 31 Snyman Rd, Brummeria Placeholder

Font Family: Courier Font Size: 12

Font Style: B I U S A

X Coordinate: 0 Y Coordinate: 0

Close Save

Better UX Suggestions

Simplify, group and organise actions into “tool bars”

GoodX Web

www.goodx.web.za

Template Description: Template name

Placeholders: Choose...

Template Name

No treating doctor selected

- Printover

Set PDF file: Choose File Test-Form.pdf

Add: Text Multiline Text Image Signature Checkbox

Show Field Borders

Search fields...

Show only manual fields

Page: 1

Sort Field Name

Expand All

Add Section

Override All Styling

+ PracName Text

- PracAdd Multiline Text

Manually editable

Field Name: PracAdd

Text: 31 Snyman Rd, Brummeria

Font Family: Courier

Font Size: 12

Font Style: B I U S A

X Coordinate: 0

Y Coordinate: 0

Lab Order Form – Bloodwork

Practice Name: PracName

Practice Address: 31 Snyman Rd, Brummeria

Practice Contact number: 012 345 6789

Patient Information

Name: Surname:

Date of birth: Contact no.:

Requested Tests

Complete Blood Count (CBC)

Lipid Panel

Basic Metabolic Panel (BMP)

Thyroid Function Test (TSH)

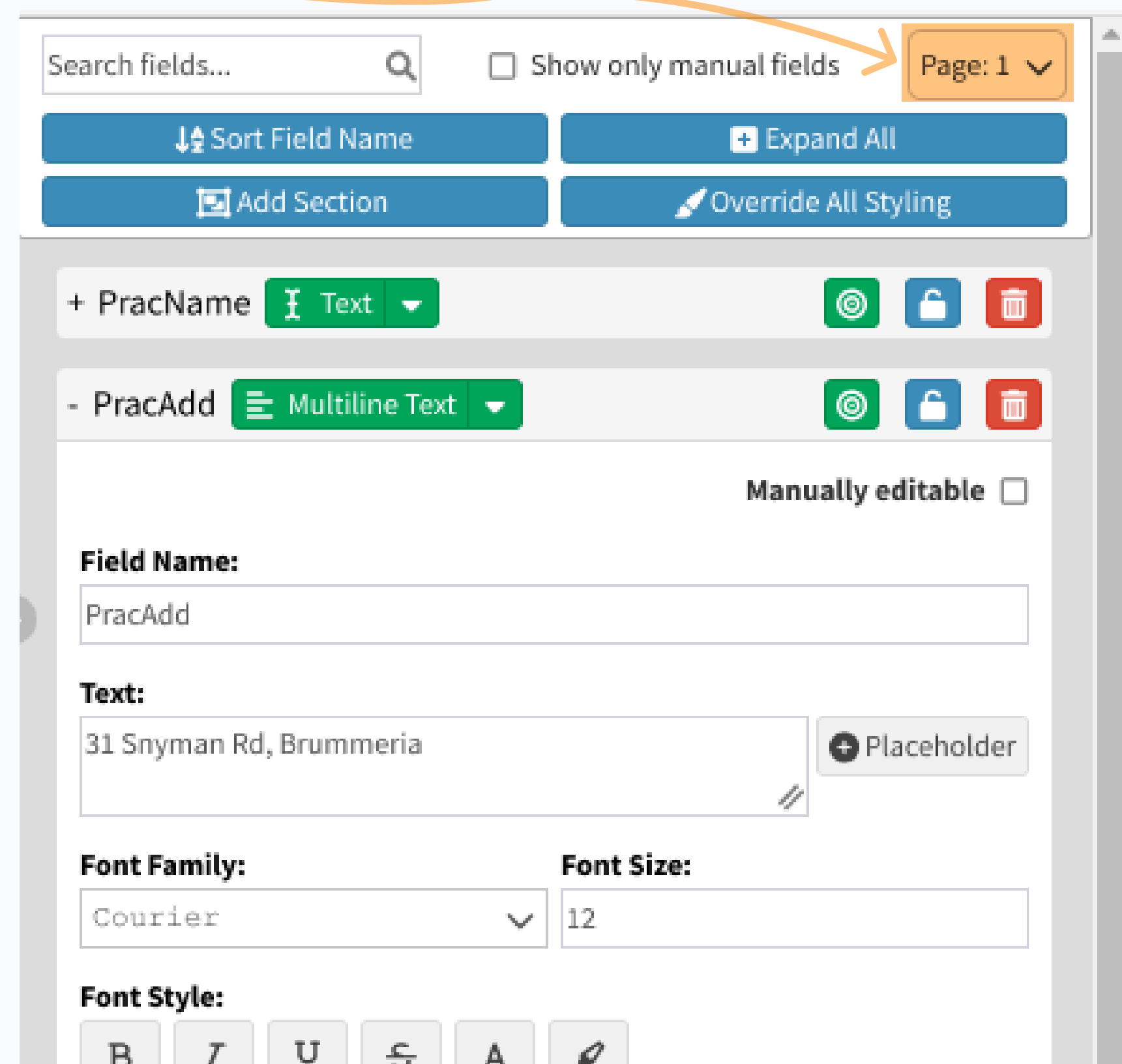
Hemoglobin A1c

Close

Save

Better UX Suggestions

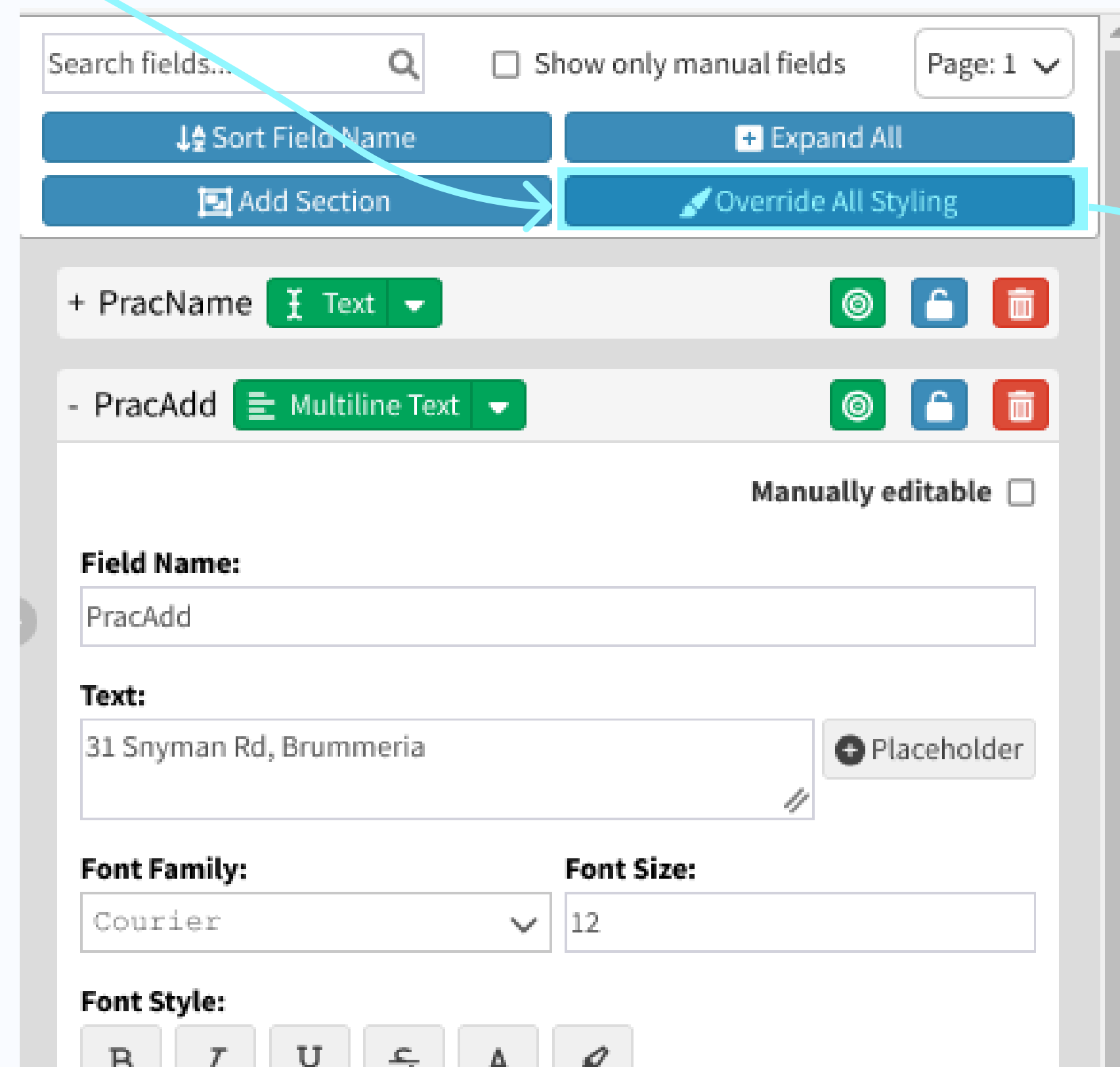
Group fields into **page groups** in Fields panel



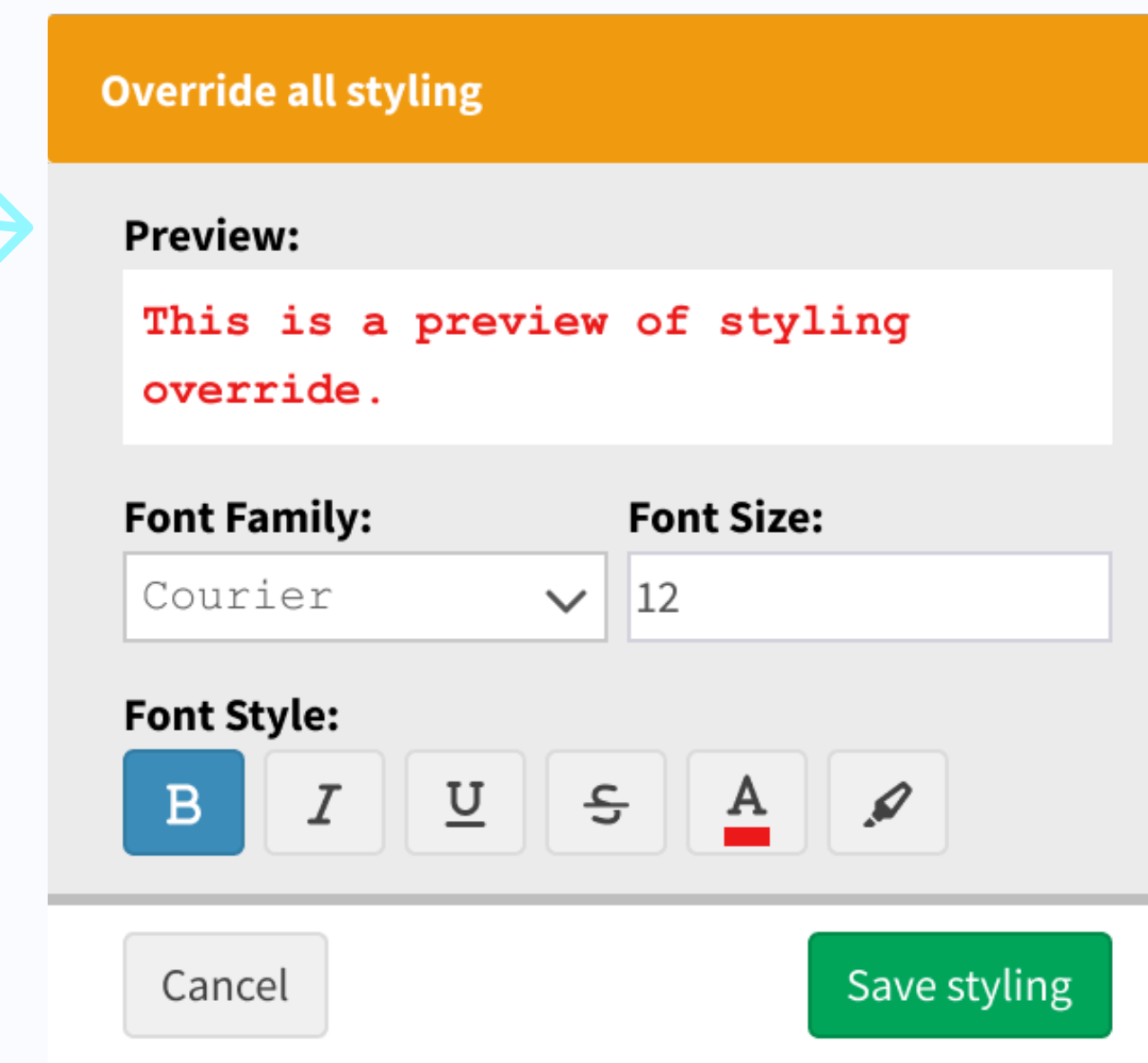
The screenshot shows a 'Fields panel' interface. At the top, there is a search bar labeled 'Search fields...' with a magnifying glass icon. To its right is a checkbox labeled 'Show only manual fields' and a dropdown menu labeled 'Page: 1'. Below these are four buttons: 'Sort Field Name' (with a double-headed arrow icon), 'Expand All' (with a plus icon), 'Add Section' (with a document icon), and 'Override All Styling' (with a pencil icon). The main area of the panel displays two field groups. The first group is '+ PracName' with a 'Text' field type, a target icon, a lock icon, and a delete icon. The second group is '- PracAdd' with a 'Multiline Text' field type, the same three icons, and a 'Manually editable' checkbox. Below the 'PracAdd' group, there are input fields for 'Field Name' (containing 'PracAdd'), 'Text' (containing '31 Snyman Rd, Brummeria'), 'Font Family' (a dropdown menu showing 'Courier'), 'Font Size' (a text input showing '12'), and 'Font Style' (a row of buttons for Bold (B), Italic (I), Underline (U), Strikethrough (ABC), and a text color picker icon).

Better UX Suggestions

Override all styling from one button & dialog (except locked fields)



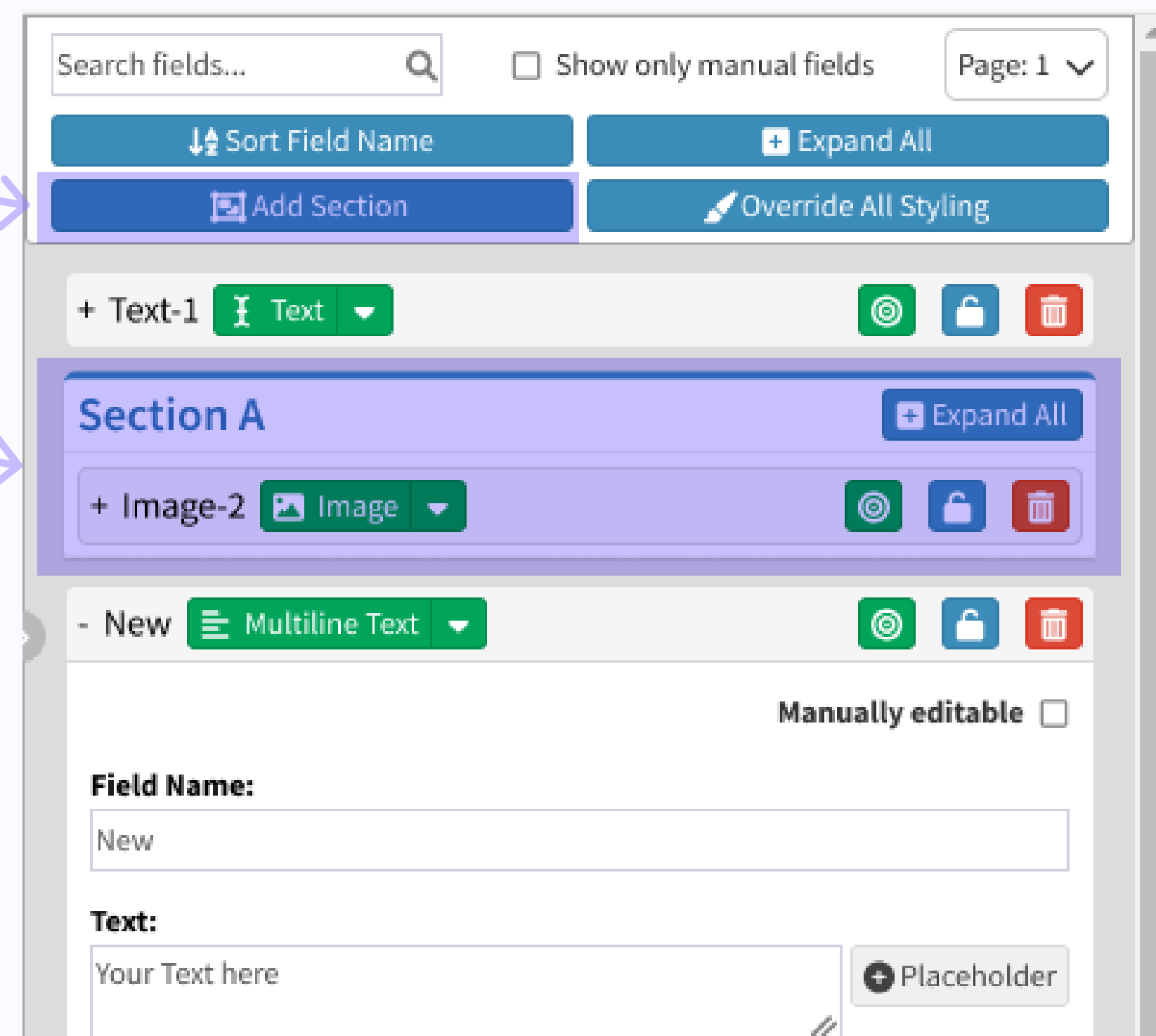
The screenshot shows a form editor interface. At the top, there is a search bar labeled "Search fields...", a checkbox for "Show only manual fields", and a "Page: 1" dropdown. Below these are three buttons: "Sort Field Name", "Expand All", and "Add Section". The "Override All Styling" button is highlighted with a red box. Below the buttons, there are two field entries: "+ PracName" with a "Text" dropdown and "- PracAdd" with a "Multiline Text" dropdown. Below these is a "Manually editable" checkbox. The "Field Name:" section contains a text input with "PracAdd". The "Text:" section contains a text input with "31 Snyman Rd, Brummeria" and a "Placeholder" button. The "Font Family:" section contains a dropdown with "Courier" and a "Font Size:" section with a text input containing "12". The "Font Style:" section contains buttons for Bold (B), Italic (I), Underline (U), Strikethrough (ABC), and a color picker (A).



The dialog box titled "Override all styling" has an orange header. It contains a "Preview:" section with a text input showing "This is a preview of styling override." in red, italicized, underlined font. Below the preview are two sections: "Font Family:" with a dropdown showing "Courier" and "Font Size:" with a text input showing "12". The "Font Style:" section contains buttons for Bold (B), Italic (I), Underline (U), Strikethrough (ABC), and a color picker (A). At the bottom are "Cancel" and "Save styling" buttons.

Better UX Suggestions

Add groups (sections) to group cluster of fields (better admin)



The screenshot shows a form builder interface with several elements. At the top, there is a search bar labeled "Search fields...", a checkbox for "Show only manual fields", and a "Page: 1" dropdown. Below these are four buttons: "Sort Field Name" (with a double arrow icon), "Expand All" (with a plus icon), "Add Section" (with a folder icon), and "Override All Styling" (with a pencil icon). The "Add Section" button is highlighted with a purple box. Below the buttons, there is a list of fields. The first field is "+ Text-1" with a green "Text" dropdown and three icons (target, lock, trash). Below it is a purple box labeled "Section A" with an "Expand All" button. Inside "Section A" is a field "+ Image-2" with a green "Image" dropdown and the same three icons. Below "Section A" is a field "- New" with a green "Multiline Text" dropdown and the same three icons. At the bottom, there is a "Manually editable" checkbox. Below that are two text input fields: "Field Name:" with the value "New" and "Text:" with the value "Your Text here". To the right of the "Text:" field is a "Placeholder" button with a plus icon. Two purple arrows originate from the text "Add groups (sections) to group cluster of fields (better admin)". One arrow points to the "Add Section" button, and the other points to the "Section A" box.

Better UX Suggestions

Add **zoom controls** to PDF: zoom out, zoom in, toggle: Fill / Fit

The image shows a PDF viewer interface. At the top, there is a toolbar with buttons for 'Multiline Text', 'Image', 'Signature', 'Checkbox', and 'Show Field Borders'. Below the toolbar, the main content area displays a form titled 'Order Form - Bloodwork'. The form contains several fields: 'PracName', 'PracAdd' (with a target icon, a lock icon, and a delete icon), '31 Snyman Rd, Brummeria', 'PracNum' (with a lock icon), and '012 345 6789'. A red box highlights the zoom controls in the top right corner, which include a minus sign, a magnifying glass icon, and a plus sign. A red arrow points from the text 'Add zoom controls to PDF' to this box. The form also includes fields for 'Surname:' and 'Contact no.:'. A vertical scrollbar is visible on the right side of the form.

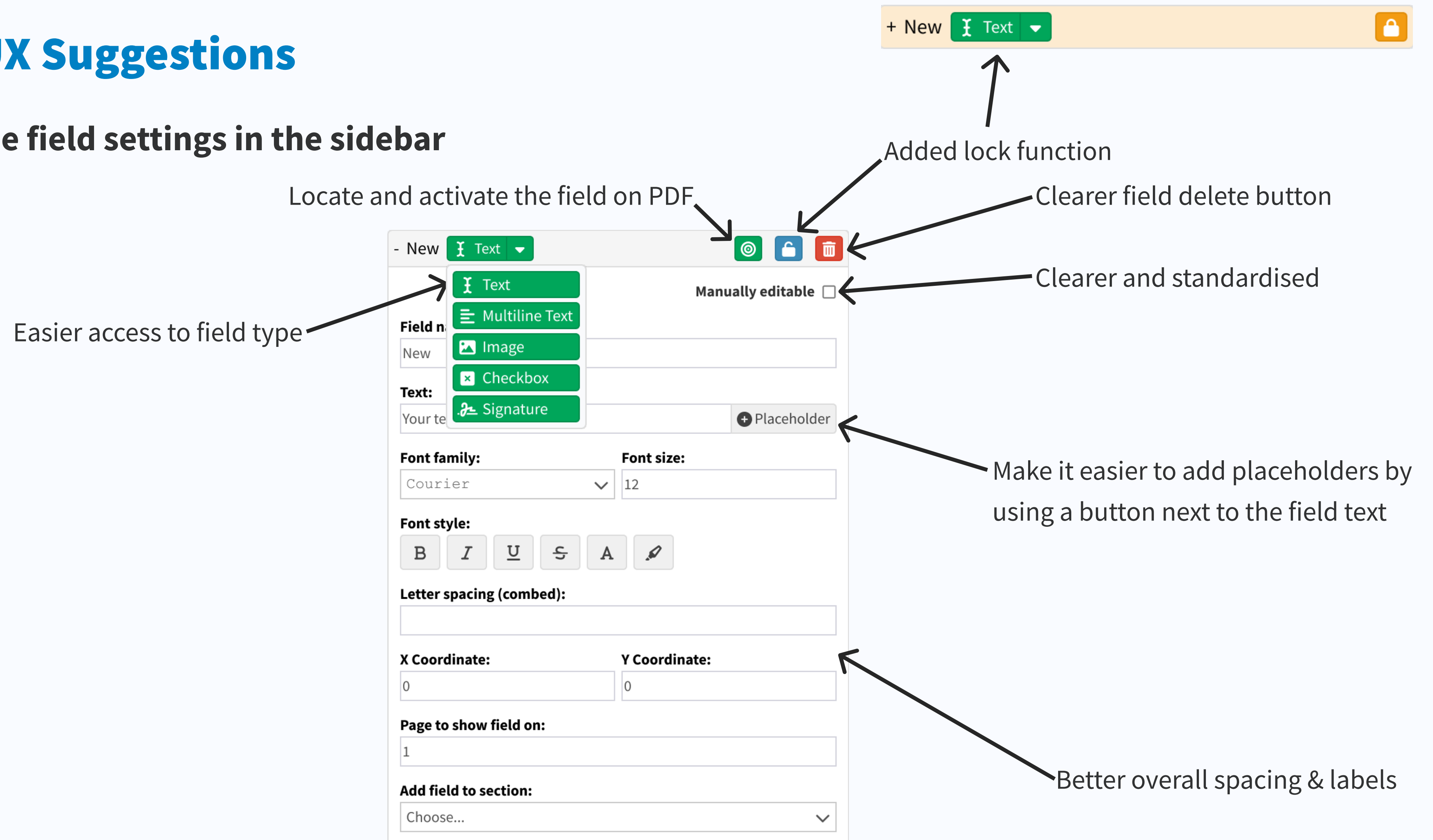
Better UX Suggestions

Improve the usability of fields (field states, actions & cursor states)

The screenshot shows a web form titled "Lab Order Form - Bloodwork". At the top, there is a toolbar with buttons for "Multiline Text", "Image", "Signature", and "Checkbox", along with a checked checkbox labeled "Show Field Borders". Below the toolbar, the form contains several input fields. The first field is labeled "PracName". The second field is labeled "PracAdd" and contains the text "31 Snyman Rd, Brummeria". The third field is labeled "PracNum" and contains the text "012 345 6789". The "PracAdd" and "PracNum" fields are highlighted with green dashed borders. The "PracNum" field is also highlighted with an orange dashed border. Dashed arrows point from the "Show Field Borders" checkbox to the green dashed borders of the "PracAdd" and "PracNum" fields. The "PracNum" field is also highlighted with an orange dashed border. The form is titled "Lab Order Form - Bloodwork".

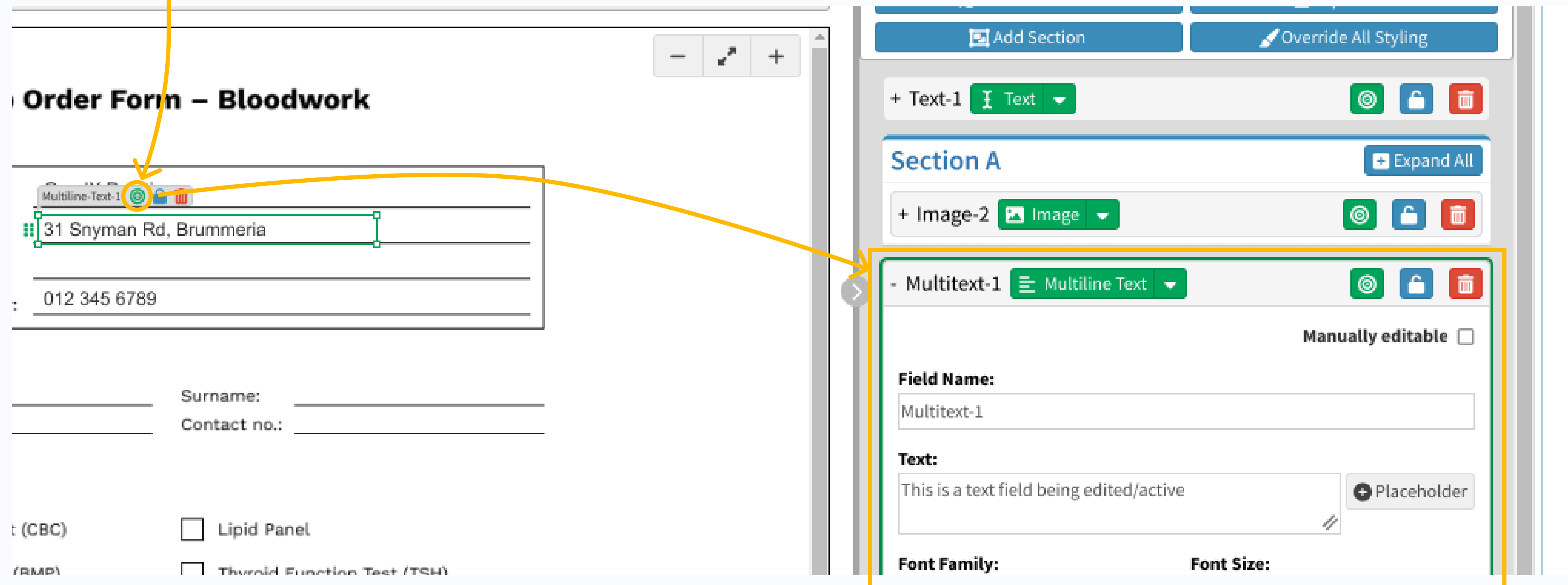
Better UX Suggestions

Improve the field settings in the sidebar



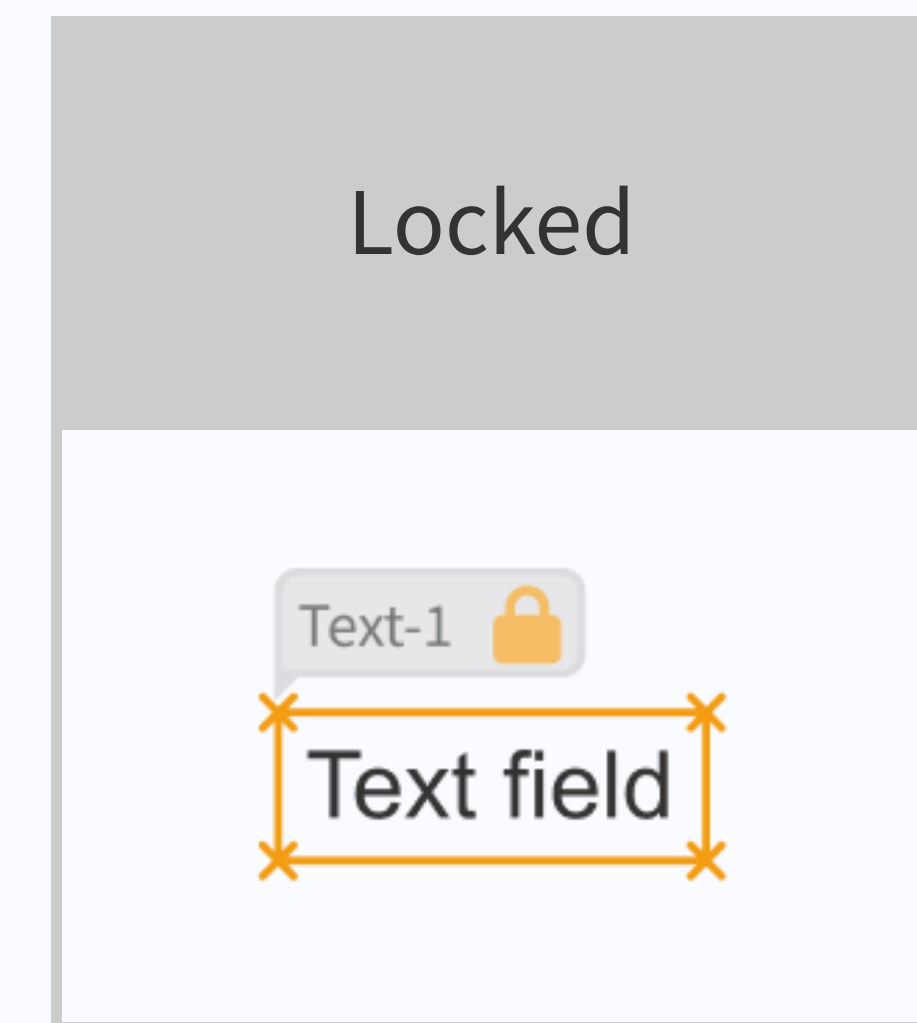
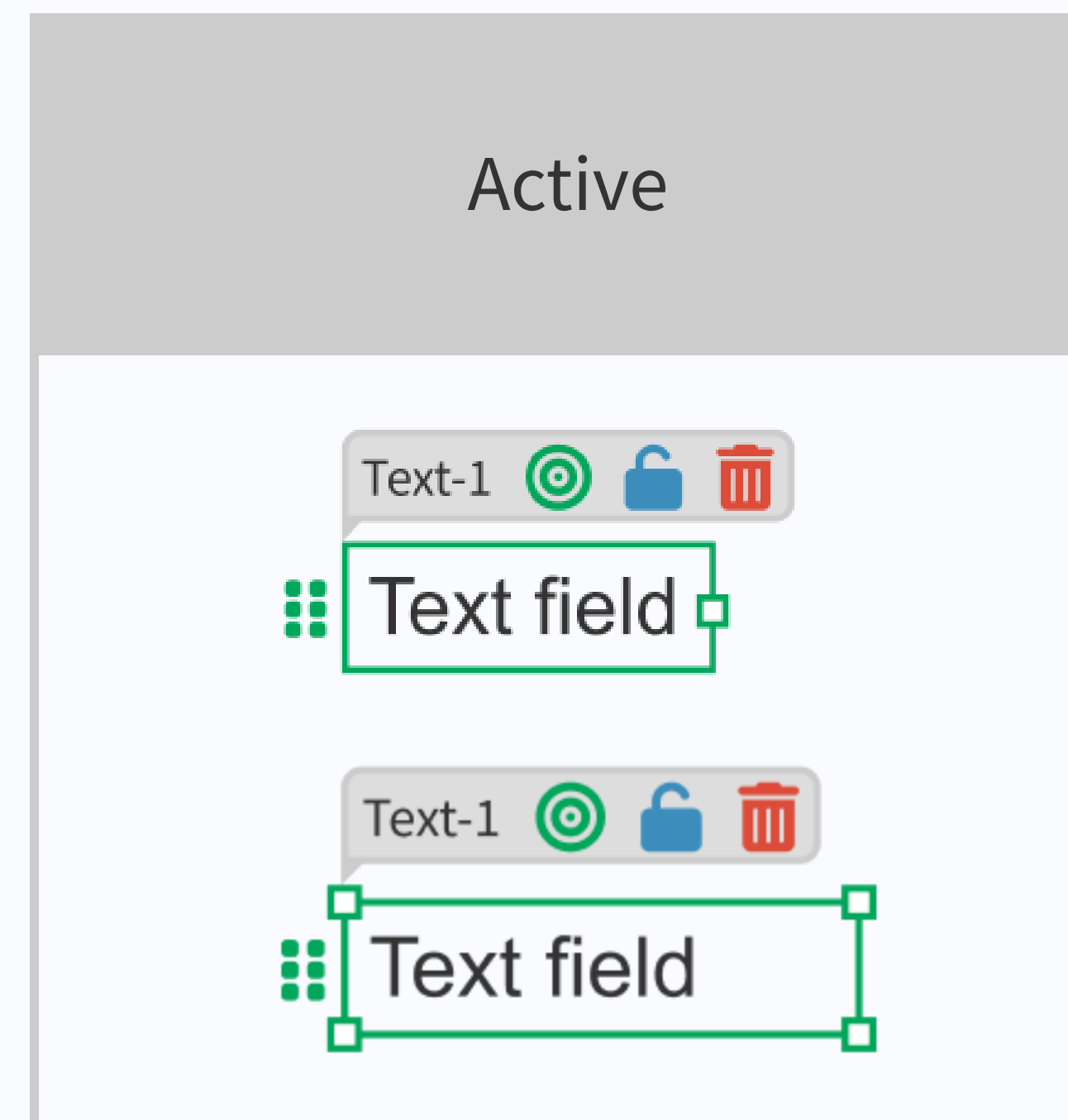
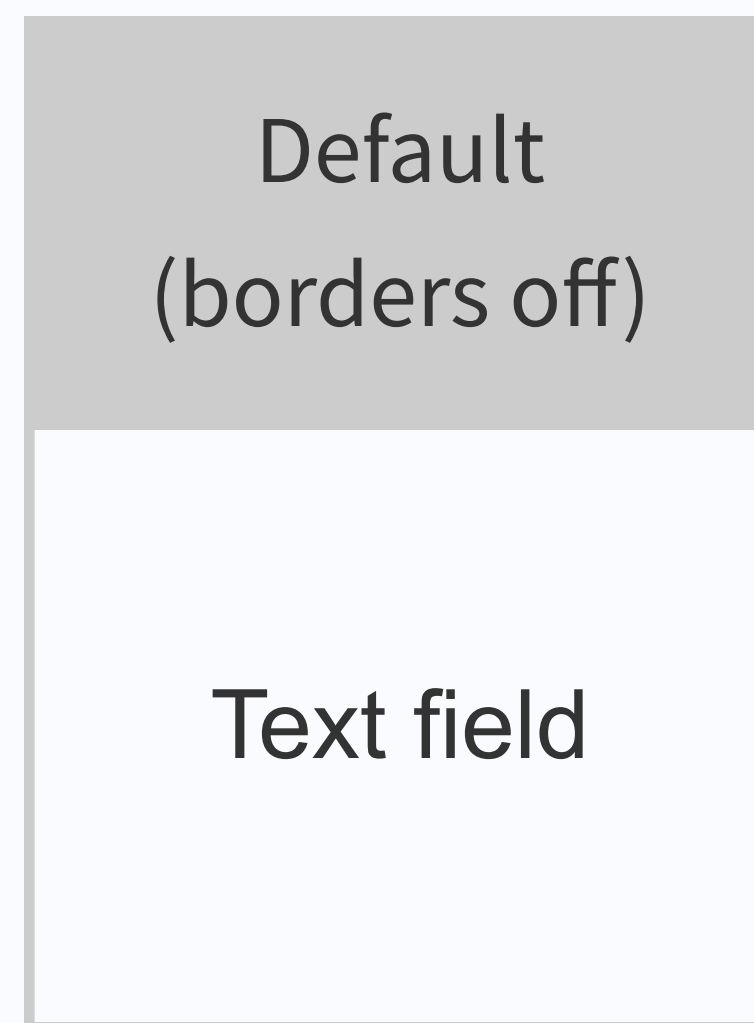
Better UX Suggestions

Clicking on field's -icon (field controls) in main interface, expands and focuses it in the side panel (and vice versa). The element will flash twice, or the side panel will scroll to show that field.



Text (& Multiline) Field Updates

1. Added control with different states



Text (& Multiline) Field Updates

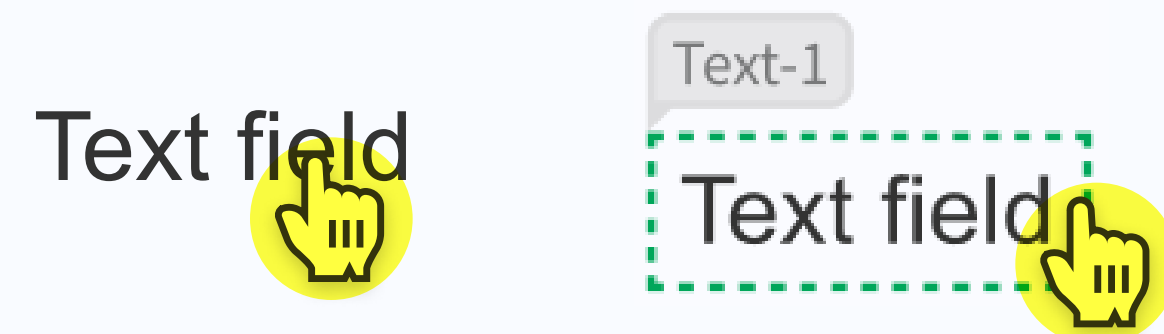
2. **Cursor state** changes to indicate possible interactions



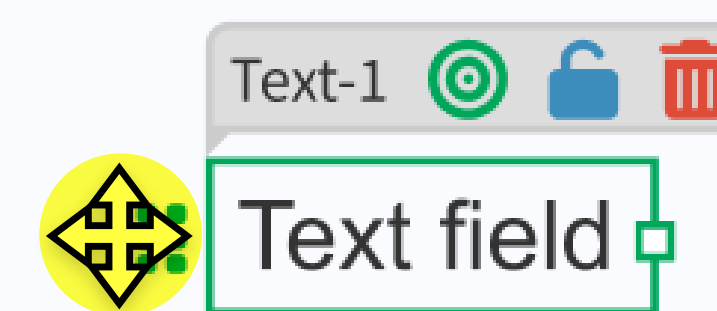
Text (& Multiline) Field Interactions & Cursor States

Hover

Default state hover over any part <pointer>



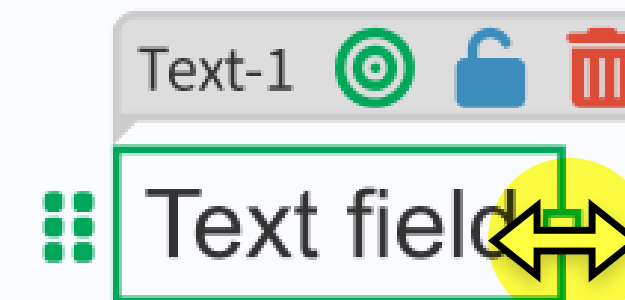
Active State hover over field handle <move>



Active State hover over lock <pointer>



Active State hover over resize handle <resize>



Active State hover over lock <pointer>



Active State hover over trash can <pointer>



Text (& Multiline) Field Interactions & Cursor States

Click

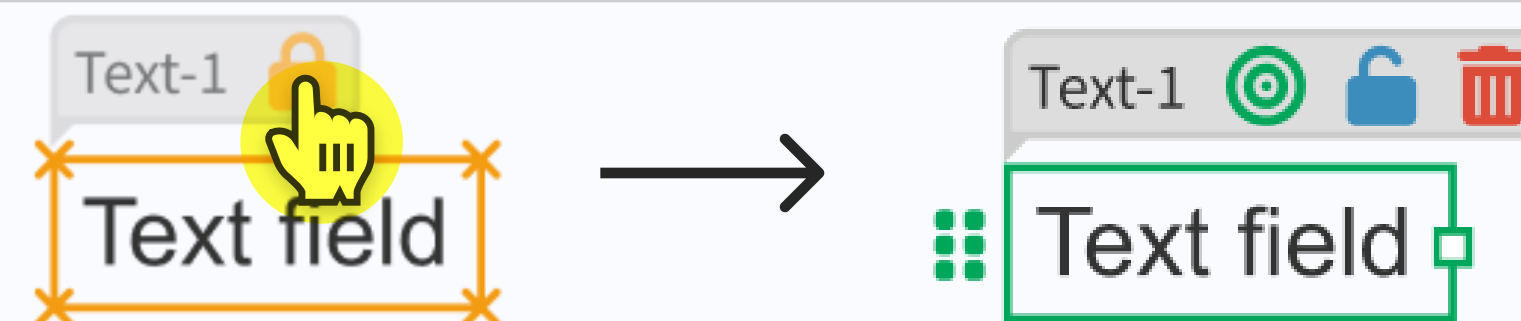
Default state click changes to Active state



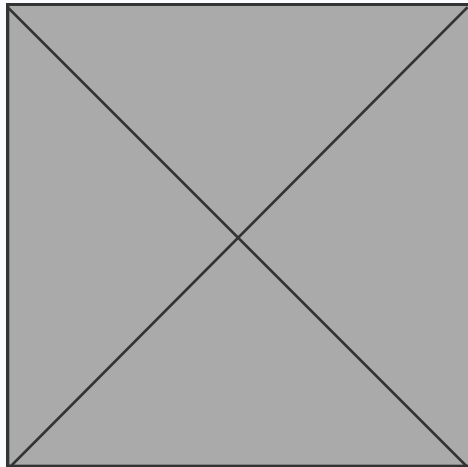
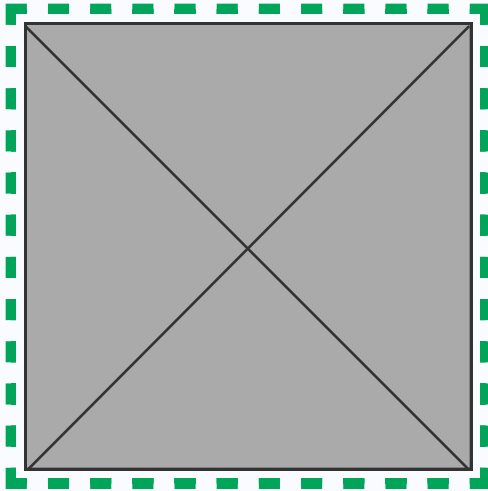
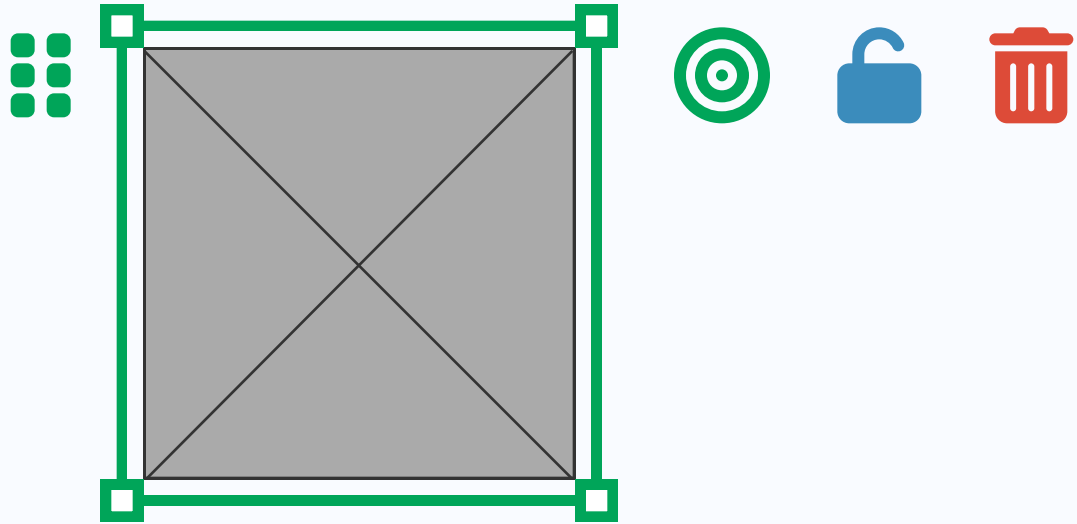
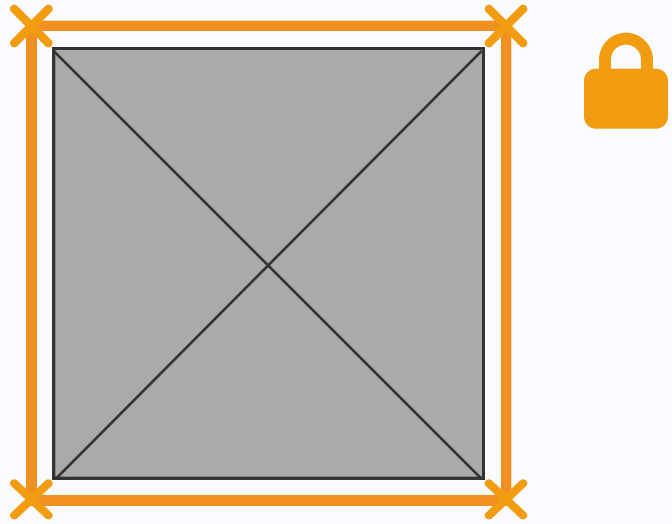
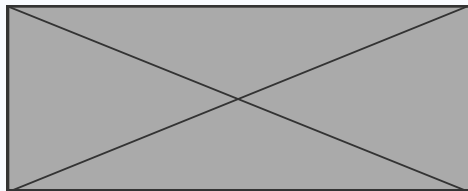
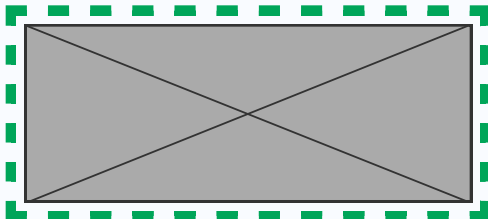
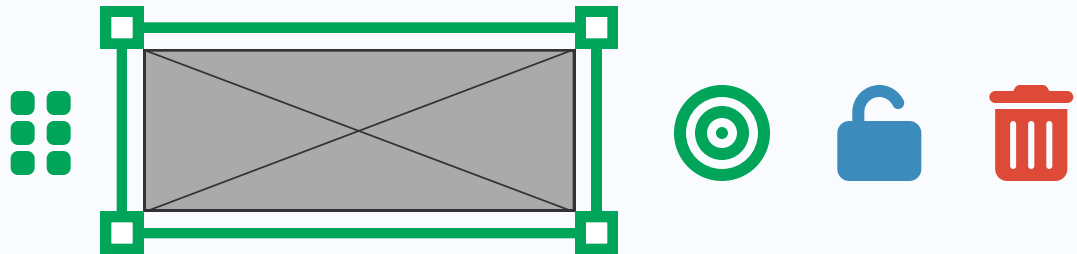
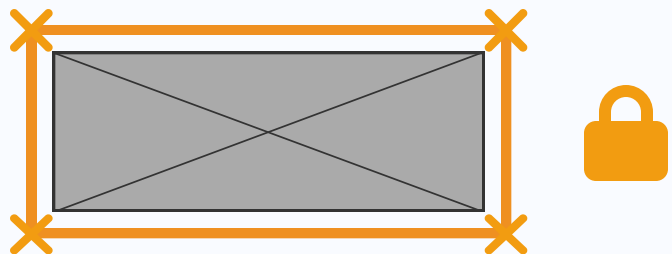
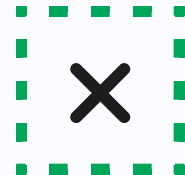
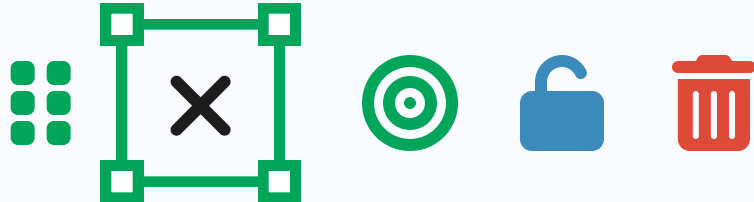
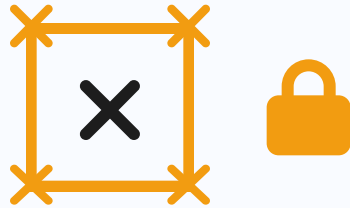
Active State click on lock changes to Locked state



Locked state click on lock changes to Unlocked state



Other Field Updates

	Default (borders off)	Default (borders on)	Active	Locked
Image				
Signature				
Checkbox				

Better UX Suggestions

Notify the user if a field's content is being cut off

The image shows a PDF form editor interface. At the top, there's a toolbar with options: 'Set PDF file:' (with a 'Choose File' button and 'Test-Form.pdf' text), 'Add:' (with buttons for 'Text', 'Multiline Text', 'Image', 'Signature', and 'Checkbox'), and a checked checkbox for 'Show Field Borders'. The main area displays a form titled 'Lab Order Form – Bloodwork'. It contains three input fields: 'Practice Name:', 'Practice Address:', and 'Practice Contact number:'. The 'Practice Address:' field contains the text '31 Snyman Rd, Bru...' which is truncated. A yellow hand cursor icon points to the end of the text, and an orange box with the text 'Text overflow warning' is positioned next to it. Below the address field, there's a section titled 'Patient Information' with fields for 'Name:', 'Surname:', 'Date of birth:', and 'Contact no.:'. At the bottom, the text 'Requested Tests' is visible. An orange arrow points from the text 'Notify the user if a field's content is being cut off' to the 'Text overflow warning' box.

Better UX Suggestions

When a text field is activated (clicked) in the main area, the corresponding field should be brought into focus and expanded in the side panel.

The image shows a form builder interface. The main area displays a form titled "Lab Order Form – Bloodwork". The form has three input fields: "Practice Name:", "Practice Address:", and "Practice Contact number:". The "Practice Address:" field is highlighted with a yellow hand cursor, indicating it is being activated. A green arrow points from this field to the side panel. The side panel shows a list of fields: "+ Text-1" (Text), "+ Image-2" (Image), and "- Multitext-1" (Multiline Text). The "- Multitext-1" field is expanded, showing its configuration options: "Field Name:" (Multitext-1) and "Manually editable" (checkbox). The top of the side panel has buttons for "Sort Field Name", "Expand All", "Add Section", and "Override All Styling". The top of the main area has buttons for "Add: Text", "Multiline Text", "Image", "Signature", "Checkbox", and a "Show Field Borders" checkbox.

Significant Interface Change Suggestions

Improved dialog messages for better clarity of system status

If uploaded file is **not a PDF**

Attention!

Only PDF format files are supported for upload.
If the document is in an image format (.jpg or .png),
first convert it to a PDF format.

Please upload a PDF format file to continue.

Ok

If uploaded file is **too big**

Attention!

The PDF file is too large.
Please upload a file smaller than 1.5 MB.

Ok

If uploaded file has the **same file name** as current

Attention!

The PDF file you're trying to upload has the same
name as the current uploaded PDF file.
Please rename your file or choose a different one to
upload.

Ok

List of suggested changes

High

1. Put fields into their own collapsible and scrollable side panel (like List View screens)
2. Simplify, group and organise actions into “tool bars”
3. Add controls and cursor states to fields for improved usability
4. Add field name labels to fields for easier identification and location
5. Error message if uploaded file is not a PDF
6. Error message if uploaded PDF is too big
7. Error message if uploaded PDF has the same file name as current PDF (even if it's been updated outside of GoodX)

List of suggested changes

Medium

1. Add print preview mode (template & clinical)
2. Add zoom controls to PDF: zoom out, maximise within bounds, zoom in
3. Group fields into page groups in Fields panel
4. Add section containers that will group/cluster similar fields (better admin)
5. Clicking on field's -icon (field controls) in main interface, expands and focuses it in the side panel (and vice versa)
6. Template mode: always start PDF Printover with open field side panel
7. Signature field should not have a line embedded in the image
8. Override ALL fields' style settings in one place (font family, size, color)
9. When a field is locked, it should not be moved and Override font settings is not applied to it

List of suggested changes

Low

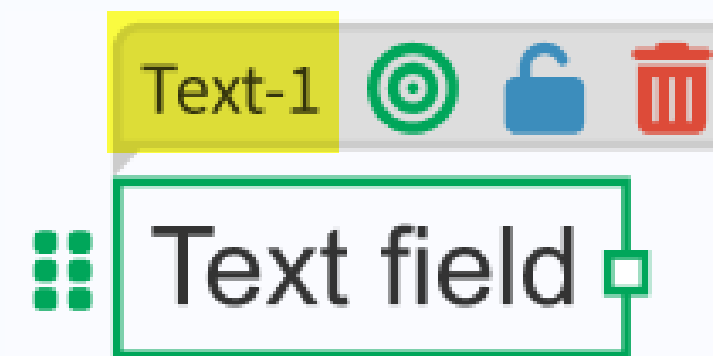
1. Template mode: always start PDF Printover with open field side panel
2. Add a faint grid overlay to help with alignment?
3. Shortcut to edit the form template directly?
4. Show uploaded PDF file name at upload location

Set PDF file:

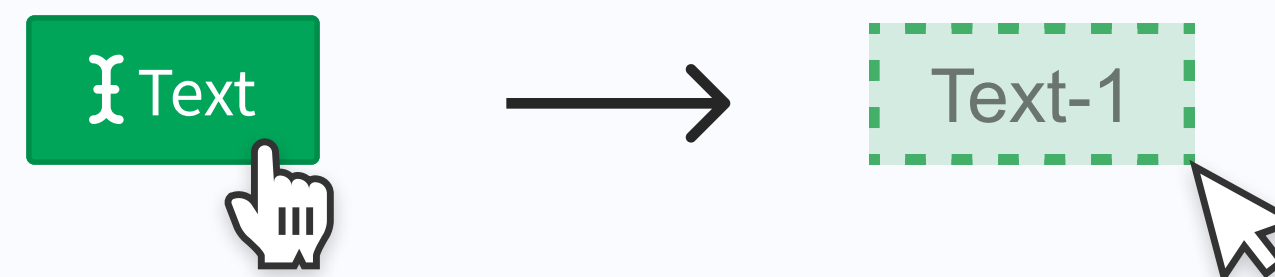
Test-Form.pdf

Additional Better UX Suggestions

- When adding a field, the field name and descriptions should automatically be: *[field type-] + #*, e.g. **Text-1**, Multiline-3, Checkbox-2

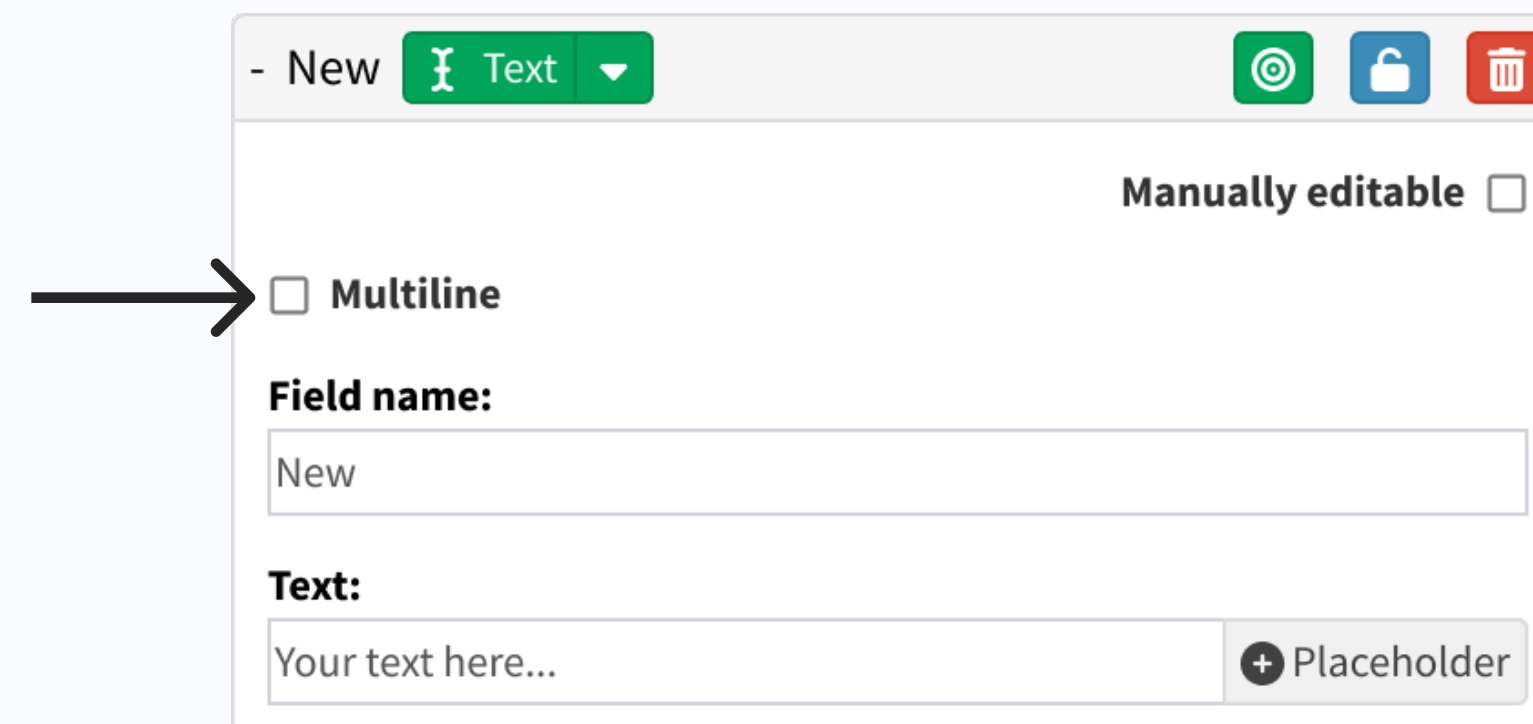


- When the user adds a new field, the field appears (as a semi-transparent outline) where the cursor is at that moment. The field is stuck to the cursor until the user clicks again to “place” the field.



Additional Better UX Suggestions

- “Merge” the Text and Multiline fields into one, with an added “Multiline” checkbox to switch.



- New **Text**   

Manually editable ☐

☐ Multiline

Field name:

Text:
  Placeholder

- Add a date formatter (to Text field or a new Date field) for the user to format their date, e.g. **dddd, D MMMM YYYY** for **Friday, 1 November 2024** (see <https://devhints.io/moment#formatting-1>)

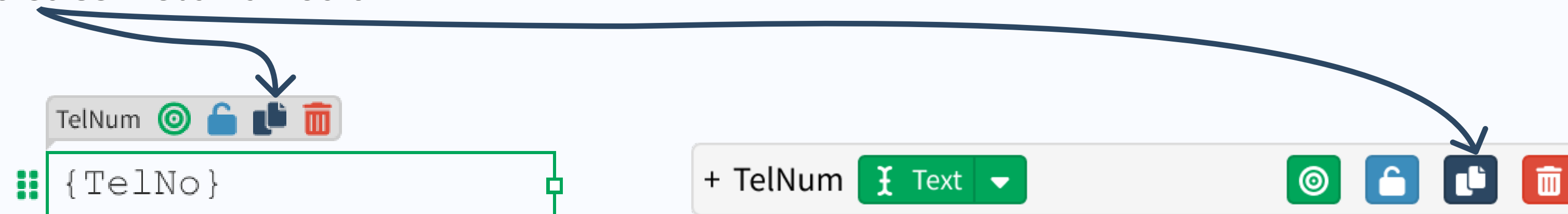


☐ Date field ?

Field name:

Additional Better UX Suggestions

- A **duplicate** field function



- Fields and sections are **draggable in the side panel**. Fields are dragged into the section blocks.



Feedback Amendments

1. Add **line height** to multiline text field (*Francois Swanepoel*)

- New

Multiline Text



Manually editable ☐

Field Name:

Text:

+ Placeholder

Font Family:

Font Size:

Font Style:

B

I

U

↺

A



Letter spacing (combed): |

X Coordinate:

Y Coordinate:

Page to show field on:

Feedback Amendments

2. Add “Developer mode” for Jinja Templating (*Francois Swanepoel*)

The image displays two versions of a 'Lab Order Form' editor interface, illustrating the addition of a 'Developer mode' for Jinja Templating.

Left Panel (Initial State):

- Field name:** PatName
- Text:** JINJA CODE
- Font family:** Courier
- Font size:** 12
- Font style:** B, I, U, S, A, and a text color picker.
- Letter spacing (combed):** 0
- X Coordinate:** 0
- Y Coordinate:** 0
- Page to show field on:** 1
- Add field to section:** Choose...
- Dev mode:** Disabled (red toggle).

Right Panel (Developer Mode Enabled):

- Text:** A code editor showing Jinja templating code:

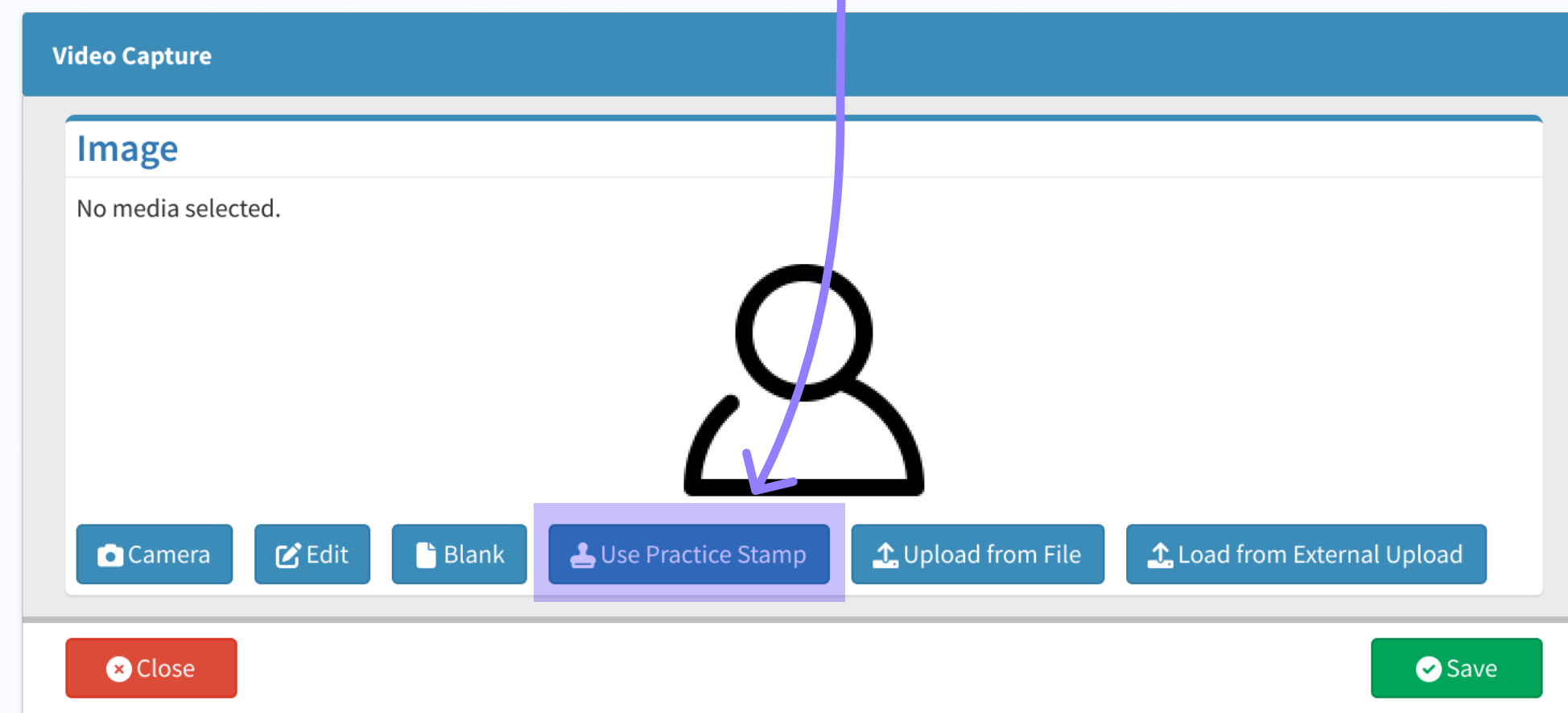
```
{# note: commented-out template because we no longer use this
  {% for user in users %}
    ...
  {% endfor %}
#}
```
- Dev mode:** Enabled (blue toggle).

Blue arrows indicate the flow of the amendment: from the 'JINJA CODE' field in the left panel to the code editor in the right panel, and from the 'Dev mode' toggle in the left panel to the 'Dev mode' toggle in the right panel.

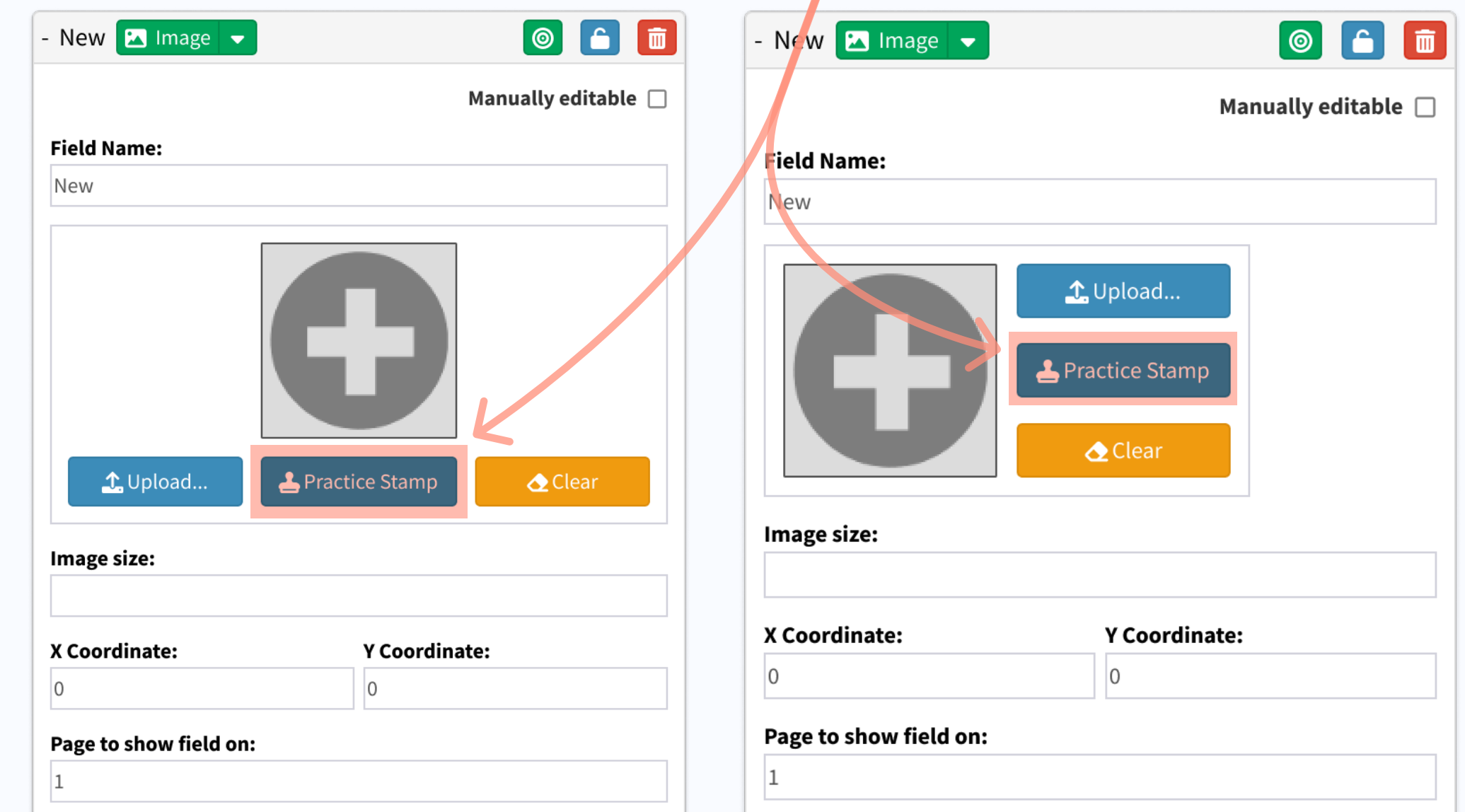
Feedback Amendments

3. Requirement for a practice stamp (Francois Swanepoel & Nadia Swanepoel)

Option A: When uploading an image, show “Use Practice Stamp” button
Might have technical/architecture constraints (universal upload image modal can't be edited)



Option B: Add a “Use Practice Stamp” button next to Image field
Clunky?



Feedback Amendments

4. Align multiple fields (solution 1: Bulk select > Align) (Clinton Forrester)

The screenshot displays the GoodX Printover interface for editing a PDF form titled "Lab Order Form - Bloodwork". The form contains sections for Practice Information, Patient Information, and Requested Tests. A right-hand sidebar provides tools for managing the form's fields. A pink arrow points from the title "Align multiple fields" to the "Bulk select" checkbox in the sidebar.

Form Fields:

- Practice Information:** Practice Name, Practice Address, Practice Contact number.
- Patient Information:** Name, Date of birth, Surname, Contact no.
- Requested Tests:** Complete Blood Count (CBC), Lipid Panel, Basic Metabolic Panel (BMP), Thyroid Function Test (TSH).

Right-hand Sidebar:

- Search fields...**
- ☐ Show only manual fields
- ☒ Bulk select
- Align:** Left, Center, Right, Justify, Top, Bottom, Middle, Bottom-Middle
- Sort Field Name**
- Expand All**
- Add Section**
- Override All Styling**
- Field List:** List of fields with checkboxes and icons (e.g., + PracName, + PracAddress, + PracNum, + PatName, + PatSurname, + PatDOB, + PatNum).

Bottom Panel:

- Select a Case:** General
- Gender:** Unknown
- Age:** Unknown
- Dependant:** 00
- Text-1**
- Easy Events:** PDF PRINTOVER, SCRIPT
- Forms Library:** Select a Form to Add...
- Active Forms:** Email All, Fax All
- PDF PRINTOVER** (button)
- Copy** (button)
- Trash** (button)

Feedback Amendments

4. Align multiple fields (solution 2: Align function only available on Section) (Clinton Forrester)

The screenshot displays the GoodX form builder interface. On the left, a form titled "Lab Order Form – Bloodwork" is shown. It includes fields for Practice Name, Practice Address, Practice Contact number, Patient Information (Name, Date of birth, Surname, Contact no.), and Requested Tests (Complete Blood Count (CBC), Lipid Panel). In the center, a panel titled "Section A" is visible, containing a list of fields: PracName (Text), PracAddress (Multiline), PracNum (Text), PatName (Text), PatSurname (Text), PatDOB (Text), and PatNum (Text). A yellow arrow points from the "Align" function icon in the "Section A" panel to an "Align" dialog box on the right. The dialog box contains the following options: Left, Center, Right, Top, Middle, Bottom, Distribute vertical spacing, and Distribute horizontal spacing. The "Apply Alignment" button is highlighted.

CA Odoo Tickets - Tasks (*not Issues/bugs*)

- ✓ • [454189] [791750] [Canada][DevReq] PDF Printover should only display the question relevant to the current page & allow scrolling
- ✓ • [GXWEB][GXFIN][745839] [Canada]Overarching Font colour setting for PDF Printover
- ↻ • [453889] [697303] [Canada][GXWEB] PDF printover to add multiple images at once

✓ *Adressed in redUX Suggestions*

↻ *Next phase*

SA Odoo Tickets - Tasks (*not Issues/bugs*)

-  • [GXWEB][JSCONRADIE][768115] [GXWEB] Transparent background on PDF printover signature
-  • [GXWEB][EXECDEMO][738754] [Dev Request] Add a Dropdown Box to PDF Printovers
-  • [GXWEB][ERC][683078] PDF printover to have a "sign off"/"amendment" which occurs when a change is done [should come with signature and includes the treating doctor name and initial]

 *Adressed in redUX Suggestions*

 *Next phase*

 *Code fix, not a feature (not a bug, should be like this)*

Click below to see interactive Prototype

PDF Printover Basic Prototype