



# PDF SHARE FORMS

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## PDF Share Forms with Forms Central Form Processing Stages

Product: PDF Share Forms Enterprise for SharePoint 2010 with Forms Central

This guide describes how to use Forms Processing Stages configurations with SharePoint workflow.

**Step 1.** Prepare workflow in Microsoft SharePoint Designer

**Step 1**

Set form stage to Validation in Current Item PDF document (Exception to Variable: Exception )

then Email [support@pdfshareforms.com](mailto:support@pdfshareforms.com)

Actions:


- Set form stage – set a stage of the form to the specified;
- Send an Email– send e-mail to specified user with notification and information about form.

Workflow scenario – user creates new form → on that moment stage is “New Form” → user fills-in a form and submits it → workflow changes stage to “Validation” and sends e-mail to the next user for review.

**Step 2.** Template

**Hierarchy**

- Page 1
  - Subform1
    - abi Surname
    - abi Name
    - abi PhoneNumber
    - abi Report
  - SubmitButton1
  - Subform2
    - ReviewedBy
      - abi EmployeeName
      - abi EmployeeSurname



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Name	Surname	PhoneNumber
Report		
<b>Reviewed By:</b>		
Employee Name	Employee Surname	

This template has following controls:

- SubmitButton1 – as submit button;
- Text Fields – for information storing;
- Subforms – store text fields.

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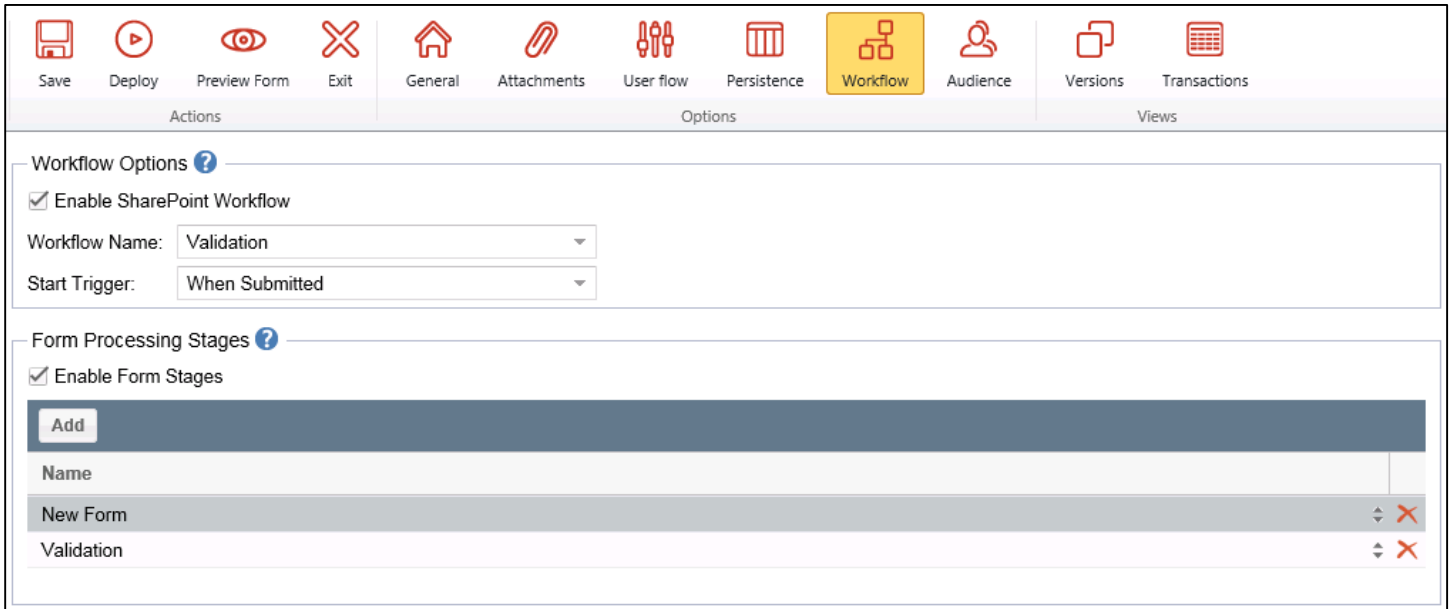


**Step 3. Deploy to Forms Central**

**Step 4. Make form active and add all required information**

Form should be active in order to allow users work with form.

**Step 5.** Navigate to “Workflow” tab and check “Enable SharePoint Workflow” and “Enable Form Stages” checkboxes



The screenshot shows the configuration interface for a PDF form workflow. The top navigation bar includes tabs for Save, Deploy, Preview Form, Exit, General, Attachments, User flow, Persistence, Workflow (selected), Audience, Versions, and Transactions. Below the navigation bar, the 'Workflow Options' section contains a checked checkbox for 'Enable SharePoint Workflow', a dropdown for 'Workflow Name' set to 'Validation', and a dropdown for 'Start Trigger' set to 'When Submitted'. The 'Form Processing Stages' section also has a checked checkbox for 'Enable Form Stages' and an 'Add' button. Below this, a table lists the stages: 'New Form' and 'Validation', each with a dropdown arrow and a delete icon.

Choose proper workflow in “Workflow Name” dropdown, here it is “Validation”. Choose when workflow should be triggered: “When Submitted” or “On Submission Expiry Date”.

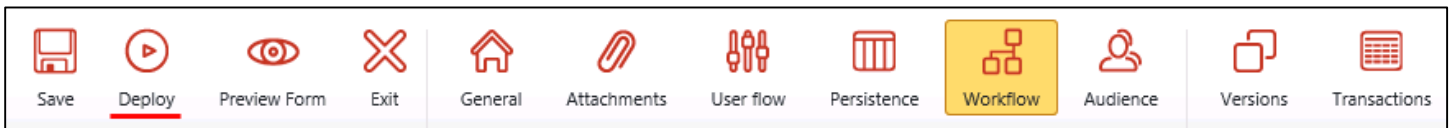
Submission expiry date could be configured in “General” tab. This option specifies the deadline for submission.

Add proper stages to “Form Processing Stages” section by clicking “Add”. In this example stages are:

- “New Form” – will appear when form is created;
- “Validation” – will appear when form is opened second time, by reviewer who gets notification about the form by e-mail (workflow scenario)

**NOTE:** Stages will be sorted in creation order. Stage names, which are used in this step, should be used in a workflow “Set form stage” action. First stage will be default for each new form.

**Step 6.** Click deploy



The screenshot shows the same configuration interface as in Step 5, but the 'Deploy' button in the top navigation bar is highlighted with a red underline, indicating it is the next step to be taken.



**Step 7. Runtime**

**Step 7.1 Open new form**

Submit Form Cancel Form Comments

1 NEW FORM 2 VALIDATION

Tools Sign Comment

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Name John Surname Smith PhoneNumber +1 (534) 536-4345

Report Production site is fixed. Problem was in regional configurations.

Reviewed By:

Employee Name Employee Surname

First stage – “New Form” is shown. Fill-in information and submit the form.

**Step 7.1 Second user navigates to submission library and finds the form**

<input type="checkbox"/> Type	Name	Modified	<input type="checkbox"/> Modified By
	forguides-StageGuideForm-954	5/13/2015 12:19 AM	DEMO\administrator

**Step 7.2 Open folder and the document**

Submit Form Cancel Form Comments

1 NEW FORM 2 VALIDATION

Tools Sign Comment

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Name John Surname Smith PhoneNumber +1 (534) 536-4345

Report Production site is fixed. Problem was in regional configurations.

Reviewed By:

Employee Name Kate Employee Surname Green

Second stage – “Validation” is shown. Fill-in and submit form.