



PDF SHARE FORMS

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Set fields to read only based on approval status

Product: PDF Share Forms Enterprise for SharePoint 2013

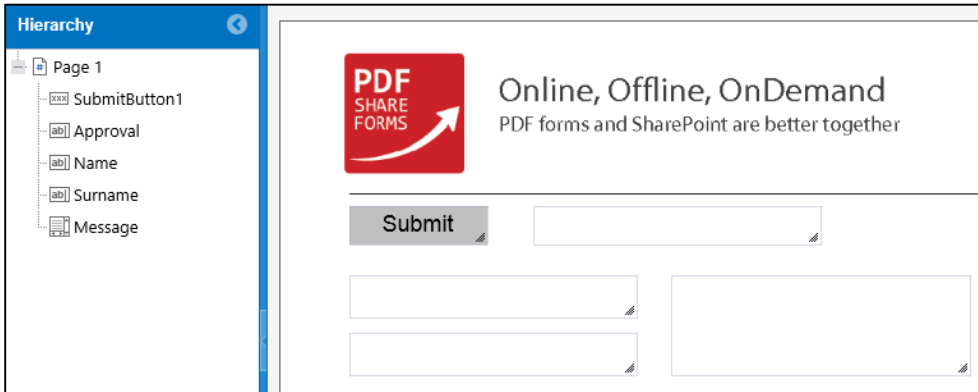
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This guide describes the steps required in order to set form's fields to read-only after the form is approved (SharePoint library is set to require content approval for submitted items).

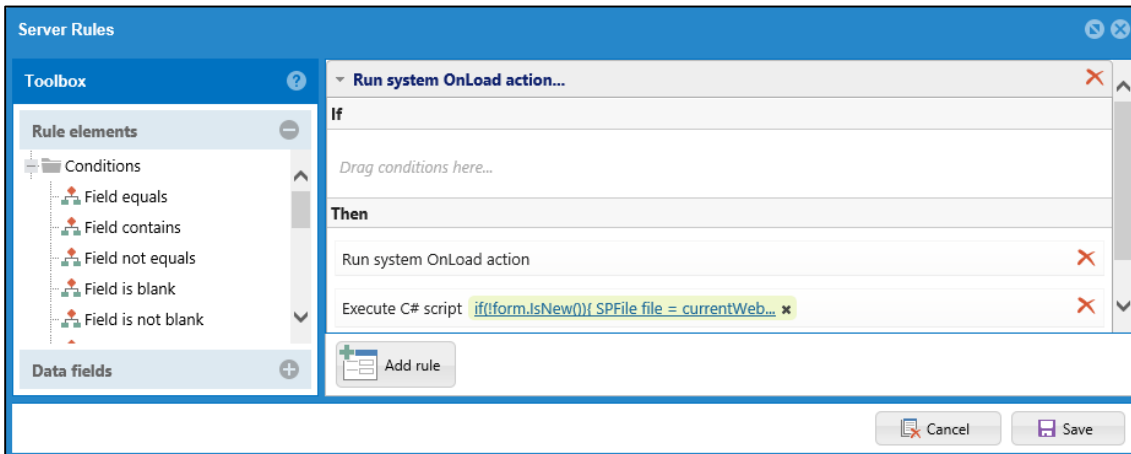
Static (Acro) form

Step 1. Prepare template



Template contains: **SubmitButton1** – for submission; **Approval** – text field to store approval status; **Name**, **Surname** and **Message** – text fields for demonstration purposes.

Step 2. Add Form Load rules. Navigate to **Developer** → **Form Load** and place **Execute C# script** action under **Run system OnLoad** action

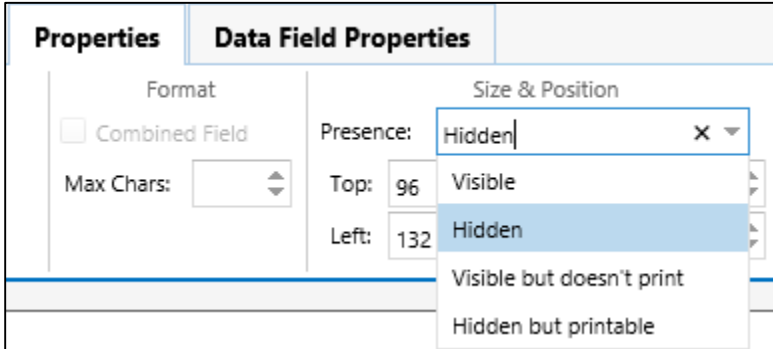


Script:

```
if(!form.IsNew()){
    SPFile file = currentWeb.GetFile(form.DocumentID);
    SPLListItem item = file.Item;
    data.resolveNode("Approval").Value = item["Approval Status"].ToString();}
```

This script loads form's approval status in **Approval** text field: 2 – if form status is "Pending"; 1 – if form status is "Rejected" and 0 – if form status is "Approved".

NOTE: Approval field should be set to hidden. Choose field and navigate to **Properties** → **Presence**



Approval field is visible only for demonstration purposes.

Step 3. Add **Global JavaScript**. Navigate to **Developer** → **Global JavaScript**

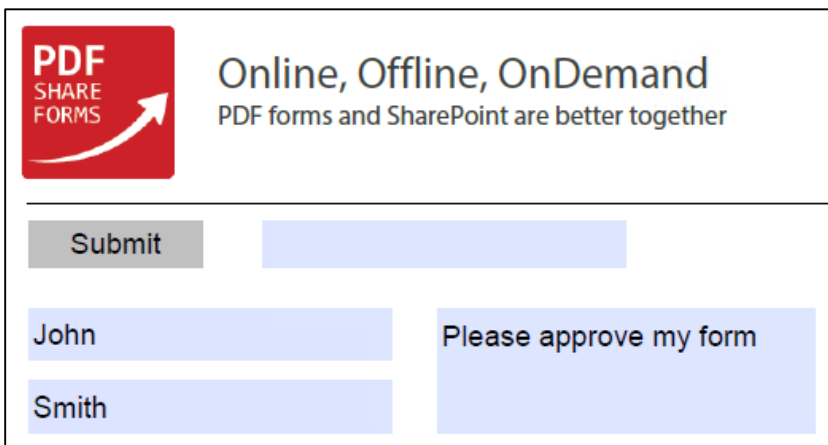
```
if(this.getField("Approval").value == '0'){
  for (var i=0 ; i<this.numFields ; i++) {
    var field = this.getField(this.getNthFieldName(i)) ;
    if (field==null) continue;
    field.readonly = true;
  }
}
```

This script will set all fields to read only if form’s approval status is “Approved”.

NOTE: to specify which field must be set to read-only use this form

```
this.getField("Name").readonly = true;
```

Step 4. Runtime. Navigate to the library and open form, then fill in fields and submit form





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Step 4.1 Open form again. Since form is still “Pending” **Approval** field contains “2” and fields are not set to read only

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Submit 2

John Please approve my form

Smith

Step 4.2 Return to the library and approve form

Check Out, Check In, Discard Check Out, Open & Check Out

View Properties, Edit Properties, Manage

Version History, Shared With, Delete Document

Share, Alert Me, Popularity Trends, Follow, Share & Track

Workflows, Publish, Unpublish, Approve/Reject, Cancel Approval, Workflows

+ new document or drag files here

All Documents Approve/reject Items My submissions ... Find a file

✓	📄	Name	Modified	Modified By	Approval Status
✓	📄	ApprovalForm_40 ✳	...	A few seconds ago	System Account Pending

Step 4.3 Open form. All fields are set to read only

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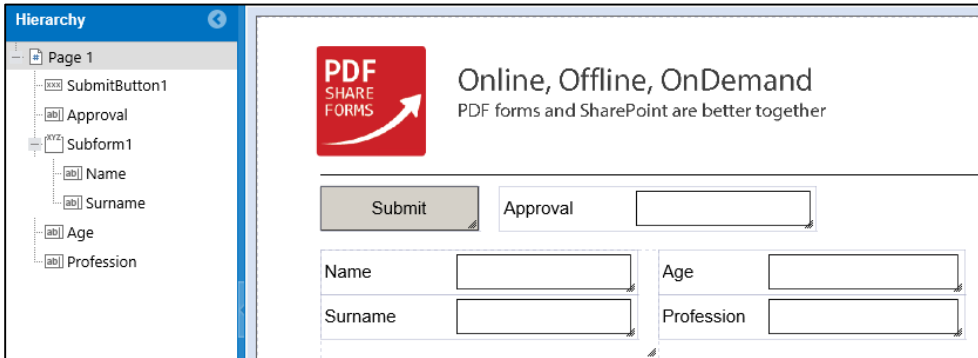
Submit 0

John Please approve my form

Smith

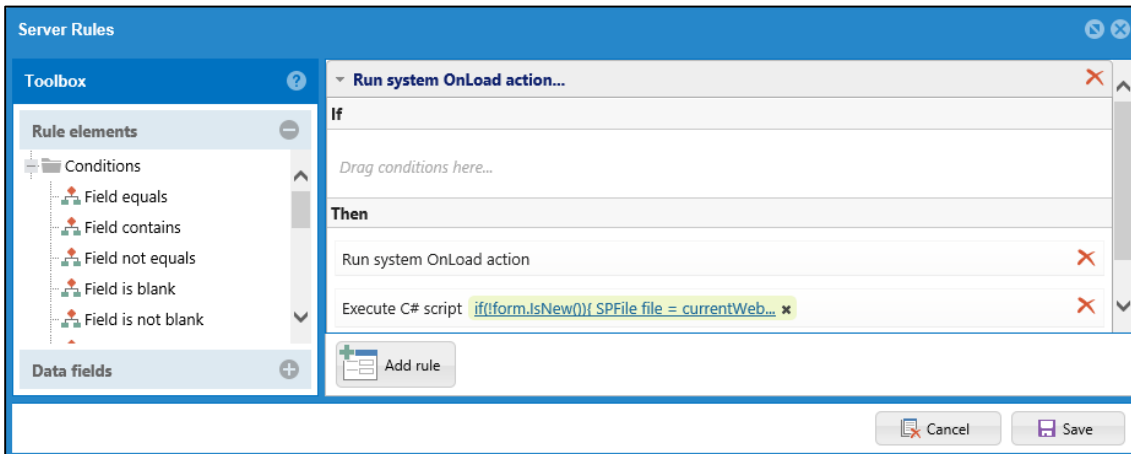
Dynamic (XFA) form

Step 1. Prepare template



Template contains: **SubmitButton1** – for form submitting; **Approval** – text field to store approval status; **Subform1** – subform to set several fields to read only at once, this subform contains two text field **Name** and **Surname**; **Age** and **Profession** – text fields for demonstration purposes.

Step 2. Add Form Load rules. Navigate to **Developer** → **Form Load** and place **Execute C# script** action under **Run system OnLoad action**

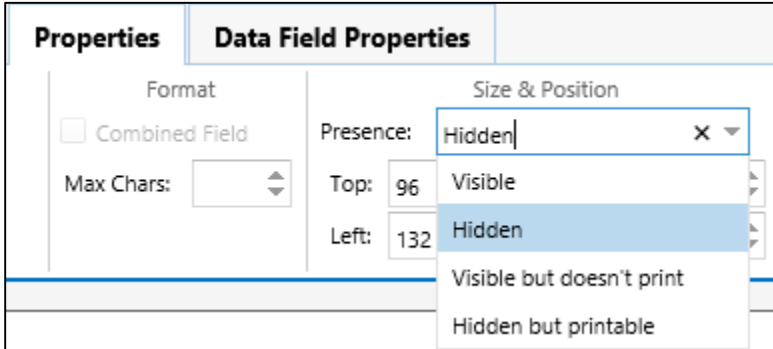


Script:

```
if(!form.IsNew()){
    SPFile file = currentWeb.GetFiles(form.DocumentID);
    SPListItem item = file.Item;
    data.resolveNode("Approval").Value = item["Approval Status"].ToString();
}
```

This script writes form's approval status in **Approval** text field: 2 – if form status is "Pending"; 1 – if form status is "Rejected" and 0 – if form status is "Approved".

NOTE: Approval field should be set to hidden. Choose field and navigate to **Properties** → **Presence**



Approval field is visible only for demonstration purpose.

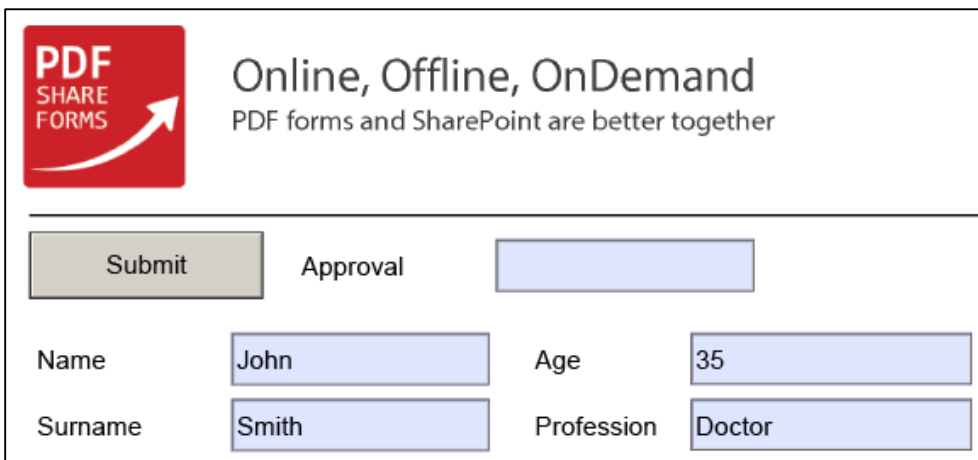
Step 3. Add **On Form Ready** script. Navigate to **Developer** → **Global Events** → **Form Ready**

```
if (xfa.resolveNode("$data.. Approval").value == '0'){
  //this line will set all fields in subform to read only
  xfa.resolveNode('$form.Root.Default..Subform1').access = "readOnly";
  //separately sets fields to read only
  xfa.resolveNode('$form.Root.Default..Age').access = "readOnly";
  xfa.resolveNode('$form.Root.Default..Profession').access = "readOnly";
}
```

This script will set fields to read only if form's approval status is "Approved".

Dynamic (XFA) forms allows using subforms that gives opportunity to affect all fields that belong to subform at once.

Step 4. Runtime. Navigate to the library and open form, then fill in fields and submit form





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Step 4.1 Open form again. Since form is still "Pending" **Approval** field contains "2" and fields are not set to read only

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Submit Approval

Name Age

Surname Profession

Step 4.2 Return to the library and approve form

Check Out, Check In, Discard Check Out, Version History, Shared With, Delete Document, Share, Alert Me, Popularity Trends, Follow, Workflows, Publish, Approve/Reject, Unpublish, Cancel Approval

+ new document or drag files here

All Documents Approve/reject Items My submissions ... Find a file

✓	📄	Name	Modified	Modified By	Approval Status
✓		GuideForm_45 ✳	A few seconds ago	System Account	Pending

Step 4.3 Open form. All fields are set to read only

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Submit Approval

Name Age

Surname Profession