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Transfer content type and template between SharePoint sites

Product: PDF Share Forms Enterprise for SharePoint 2010

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This guide describes how to import template from one SharePoint site to another by using solution package.

Template

Step 1. Add field that automatically creates new column for mapping

Control Type	Text Field
Label	<input type="text" value="NewMapping"/> *Required <input type="checkbox"/> No Label
Name	<input checked="" type="checkbox"/> Generate name <input type="text" value="NewMapping"/> *Required
Data Field	<input checked="" type="radio"/> Autocreate *Required <input type="radio"/> Map to existing data field <input type="text" value=""/>
Link to SharePoint Column	<input checked="" type="radio"/> Autocreate new column (type: Text) <input type="radio"/> No linking <input type="radio"/> Map to existing SharePoint column <input type="text" value="% Complete"/> New
Options	<input type="checkbox"/> No border

OK Cancel

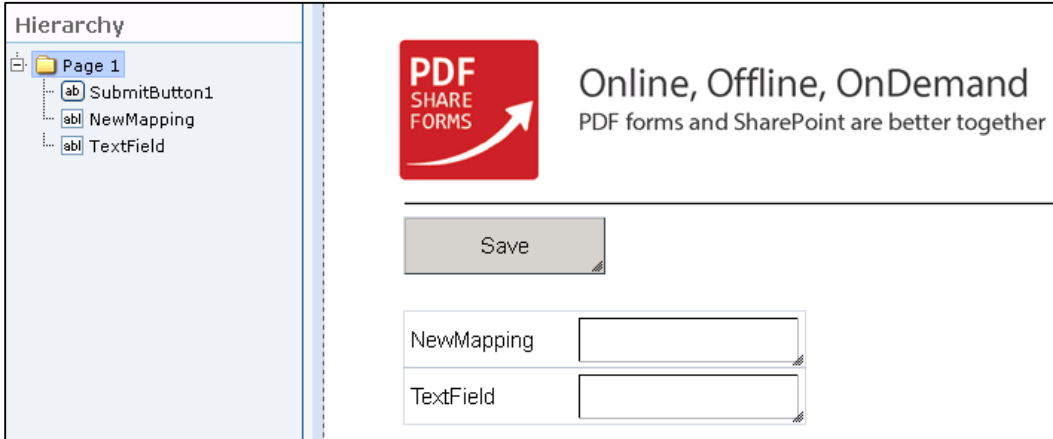
Step 1.1 Add another field and map it to existing SharePoint column

Control Type	Text Field
Label	<input type="text" value="TextField"/> *Required <input type="checkbox"/> No Label
Name	<input checked="" type="checkbox"/> Generate name <input type="text" value="TextField"/> *Required
Data Field	<input checked="" type="radio"/> Autocreate *Required <input type="radio"/> Map to existing data field <input type="text" value="NewMapping"/>
Link to SharePoint Column	<input type="radio"/> Autocreate new column (type: Text) <input type="radio"/> No linking <input checked="" type="radio"/> Map to existing SharePoint column <input type="text" value="Report2"/> New
Options	<input type="checkbox"/> No border

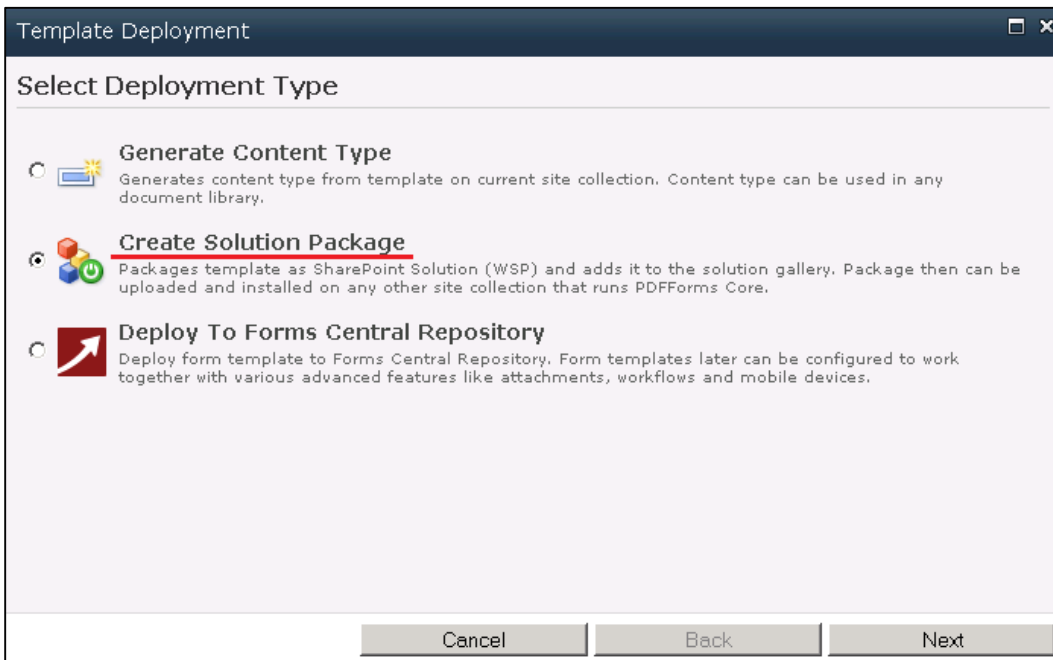
OK Cancel



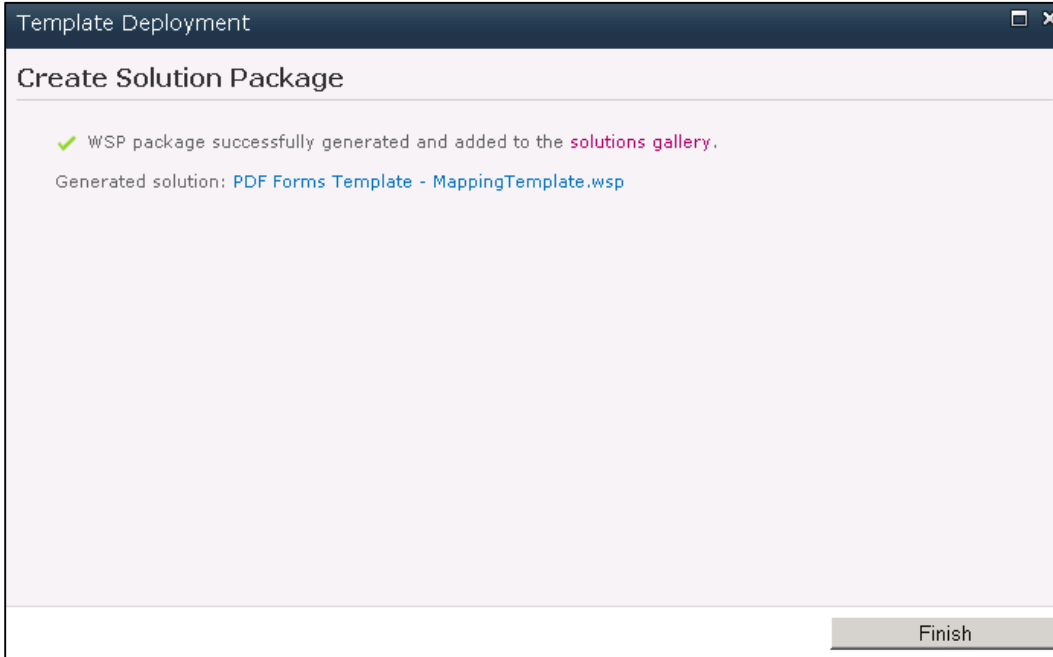
Step 1.2 Add submit button. Result



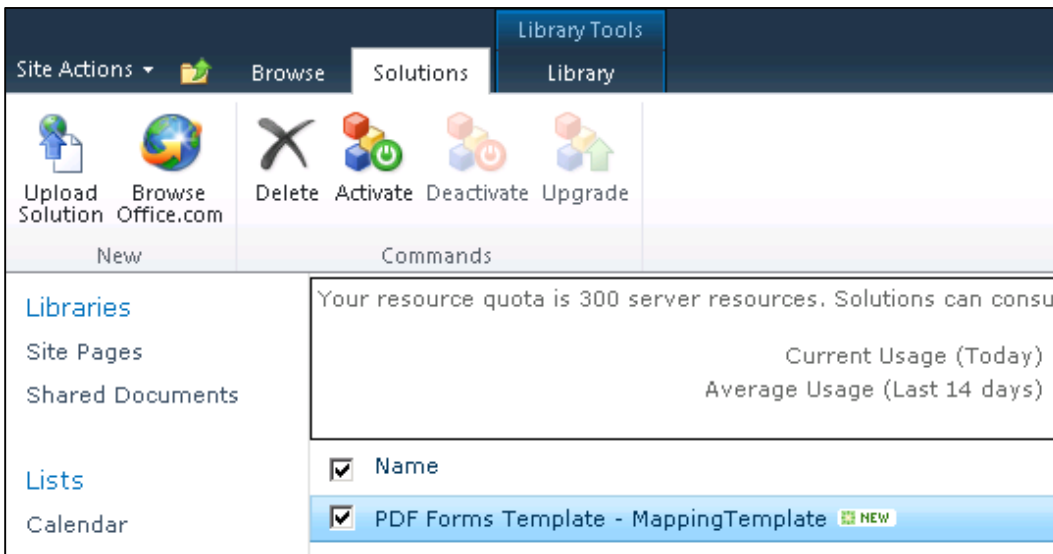
Step 2. Navigate to **PDF Form Tools** → **Home** → **Deploy** and choose **Create Solution Package**



Step 2.1 In result, user will get reference to solutions gallery. Click on “solution gallery”



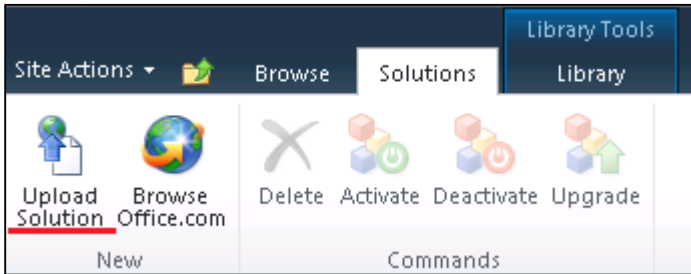
Step 3. Download solution. Click on solution and downloading dialog will appear



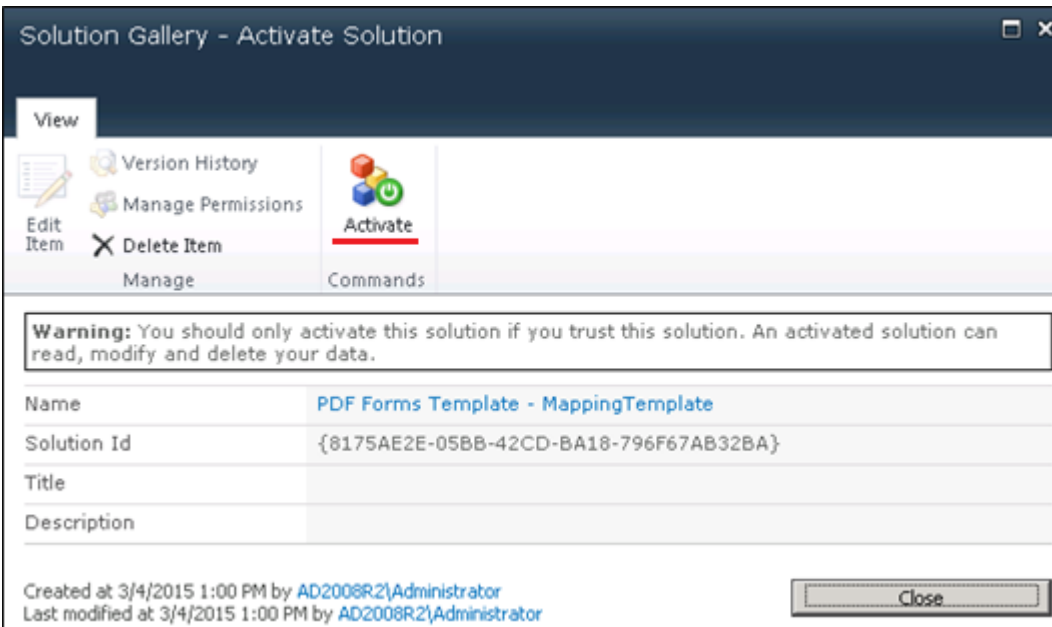
Add solution to a second SharePoint site

Step 1. Navigate to target SharePoint site.

Step 2. Navigate to **Site Actions** → **Site Settings** → **Solutions** and click **Upload Solution**



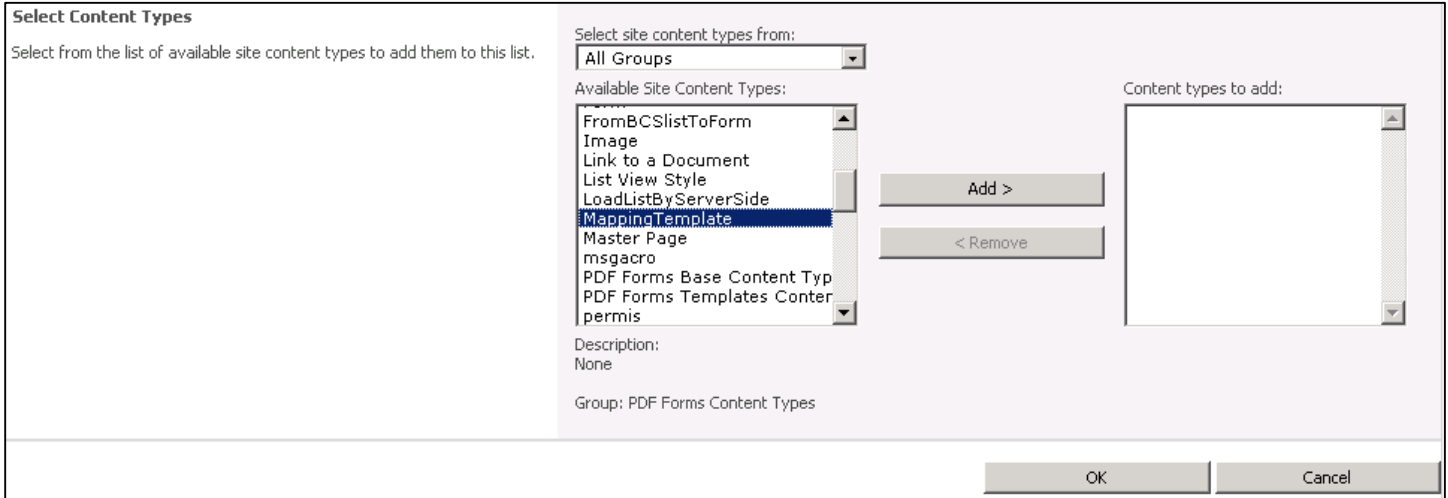
Step 2.1 Activate solution



Step 3. Navigate to library where new content type is needed and choose **Library Tools** → **Library** → **Library Setting** → **Add from existing site content types**

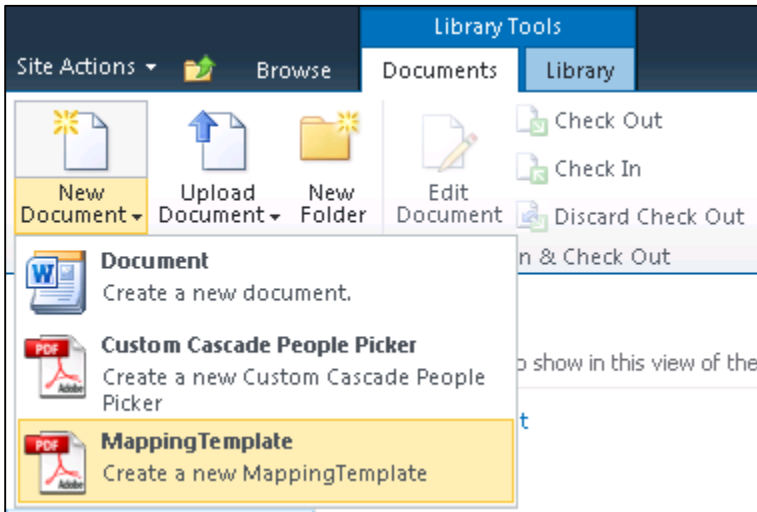


Step 3.1 Choose content type which was uploaded with solution package, click **Add** and then **Ok**



This allows user to create form from this content type in current library.

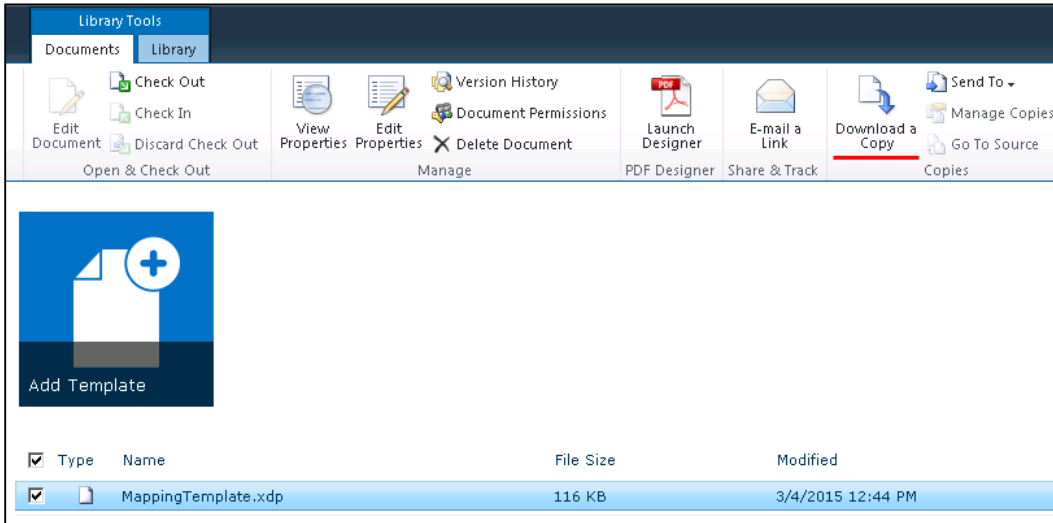
Step 3.2 Result. New Content type appears



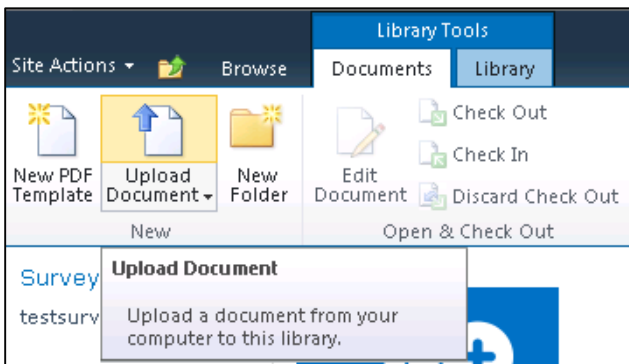
NOTE: Template that was used to create this content type (in first SharePoint site) will not be created in current SharePoint site (second SharePoint site).

Transfer template from a first SharePoint site to a second

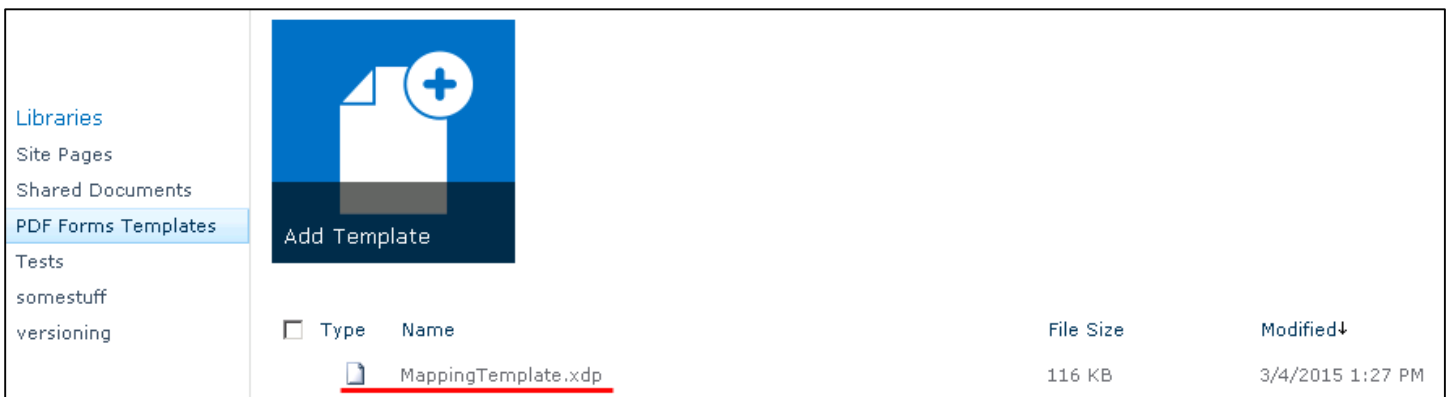
Step 1. In order to transfer template from one SharePoint site to other, navigate to **PDF Forms Templates** → choose proper form (“MappingTempalte” in this example) → **Library Tools** → **Document** → **Download a Copy**



Step 2. Navigate to second SharePoint site. Choose **PDF Forms Template** → **Library Tools** → **Documents** → **Upload Document** and upload previously downloaded template

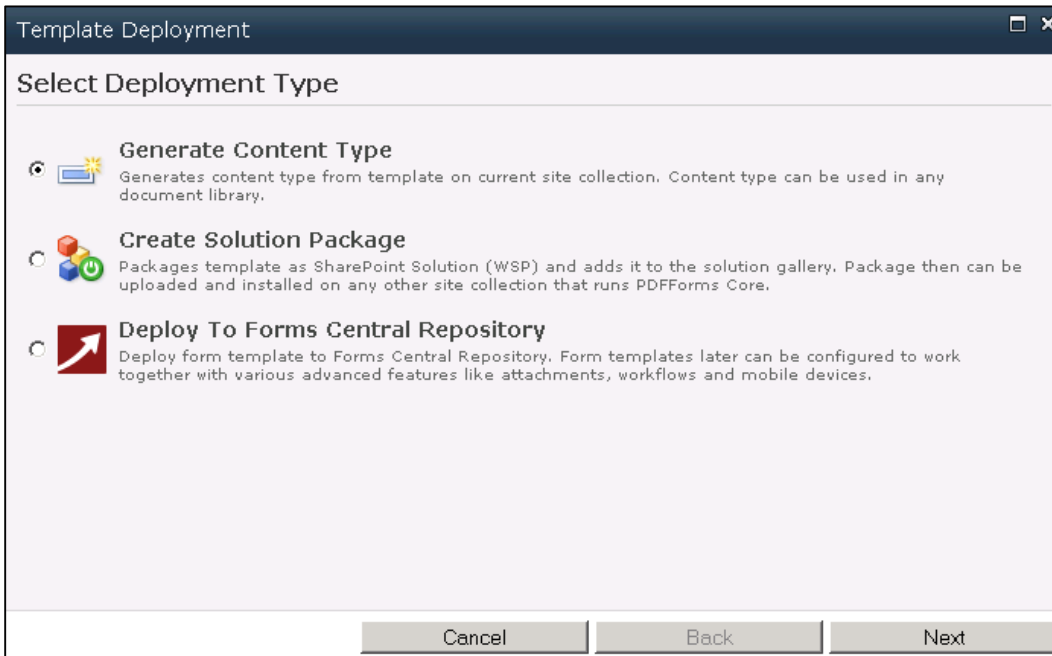


Step 2.1 Result

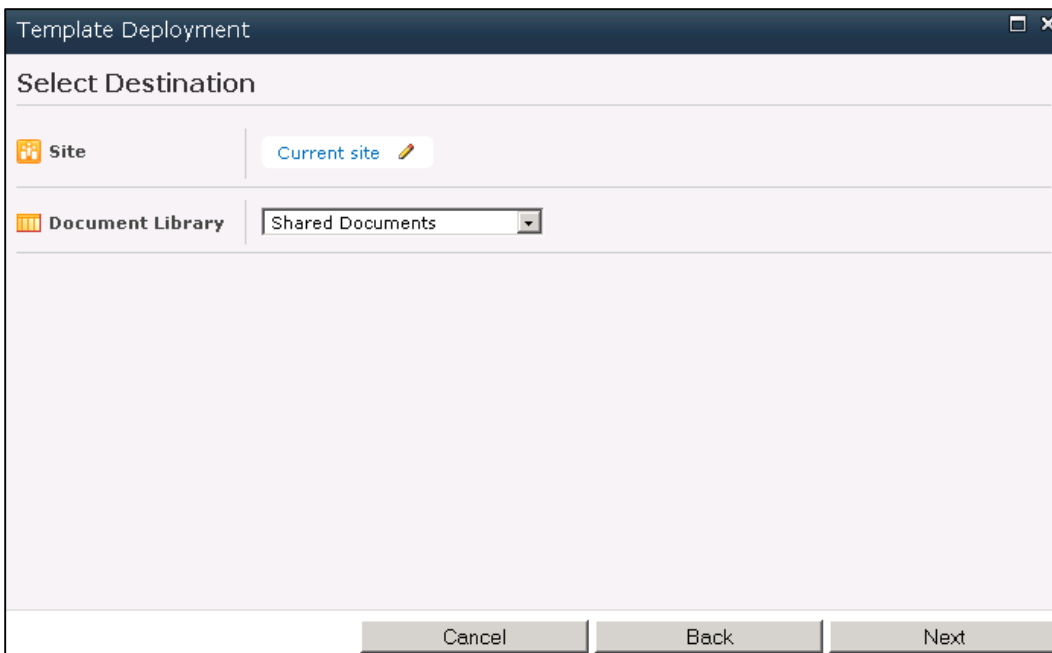


Connect content type and a template

Step 1. Open imported template in PDF Share Forms designer. Navigate to **PDF Form Tools** → **Home** → **Deploy** and choose **Generate Content Type**

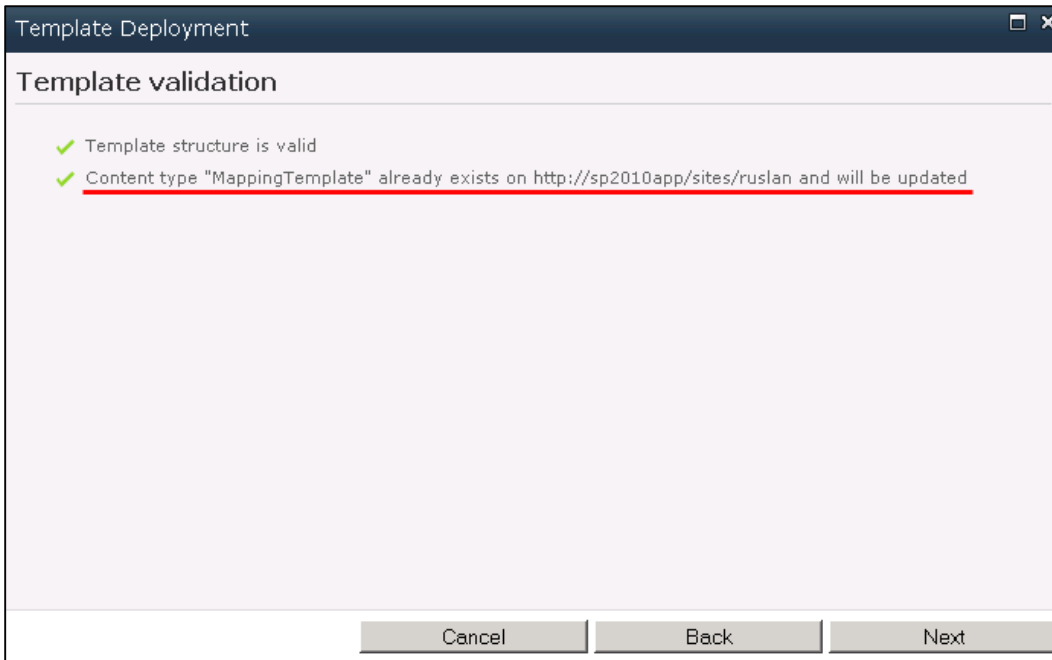


Step 1.1 Choose the same **Document Library** which was used on Step 3 in "[Add solution to the second SharePoint site](#)" site





Step 1.2 Since content type was created on Step 3 in "[Add solution to the second SharePoint site](#)" user will see message that content type will be updated



Now this template can be used to update content type or create new content type.

Mapping

All mapping that was on fields while template was in SharePoint site one, was transferred with solution package and template.

Step 1. Create new form and fill in fields, then submit a form

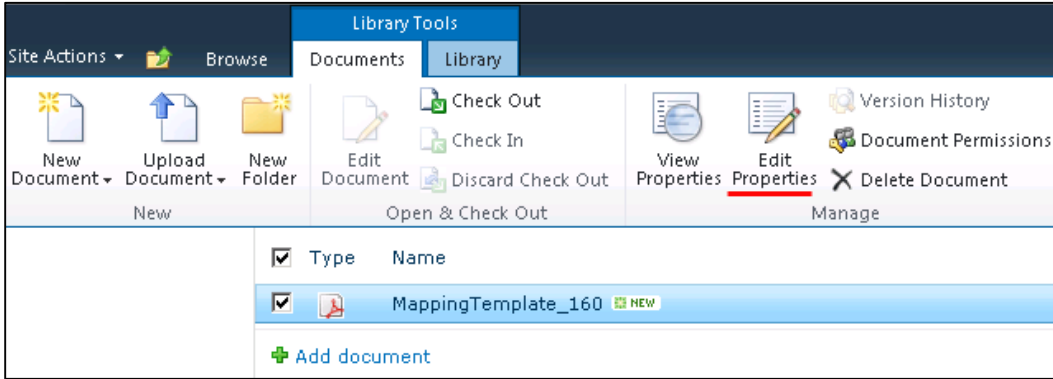
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Save

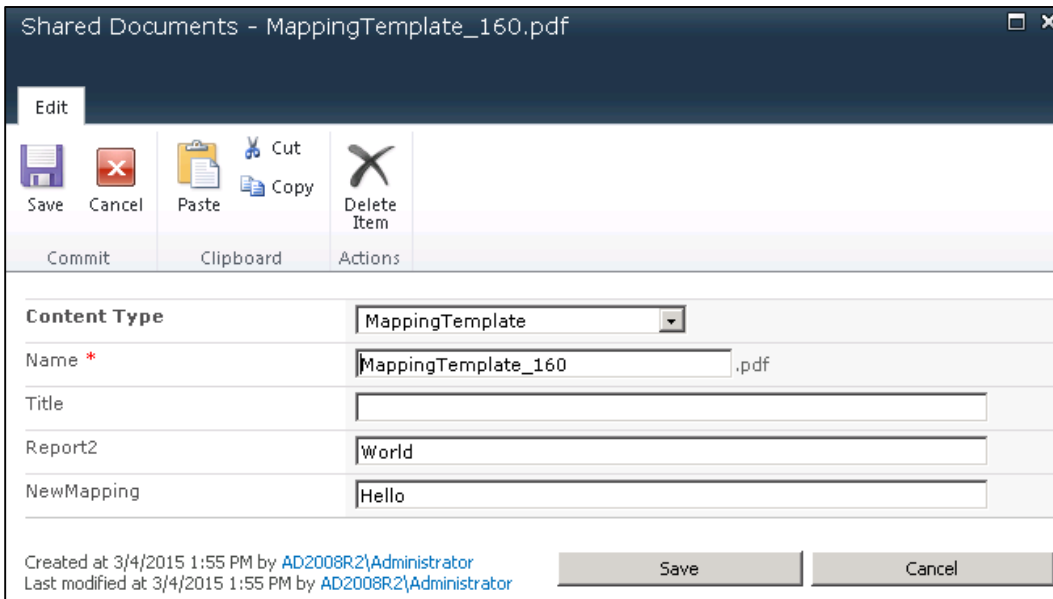
NewMapping Hello

TextField World

Step 2. Choose form in library → **Library Tools** → **Documents** → **Edit Properties**



Step 2.1 User will see values that he added to field





Step 2.3 Change values and click **Save**

Shared Documents - MappingTemplate_160.pdf

Edit

Save Cancel Paste Copy Delete Item

Commit Clipboard Actions

Content Type MappingTemplate

Name * MappingTemplate_160.pdf

Title

Report2 World 21

NewMapping Hello 21

Created at 3/4/2015 1:55 PM by AD2008R2\Administrator
Last modified at 3/4/2015 1:55 PM by AD2008R2\Administrator

Save Cancel

Step 3. Open form. Values in fields are changed

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Save

NewMapping Hello 21

TextField World 21