



PDF SHARE FORMS

Online, Offline, OnDemand

PDF forms and SharePoint are better together

Viewing list information
inside PDF file based
on selected criteria

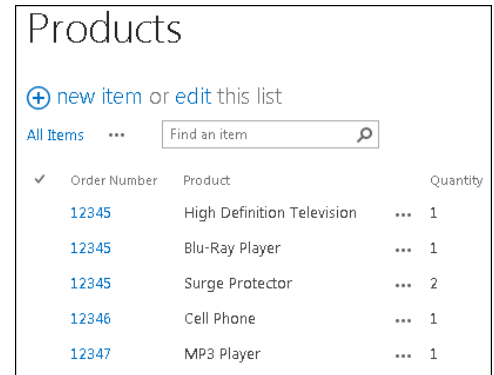
This guide will show how to populate PDF form with data from the list based on selected criteria.

Step 1. For this example were used following SharePoint lists:

Products list

“Products” list has three columns:

- Order Number
- Product
- Quantity

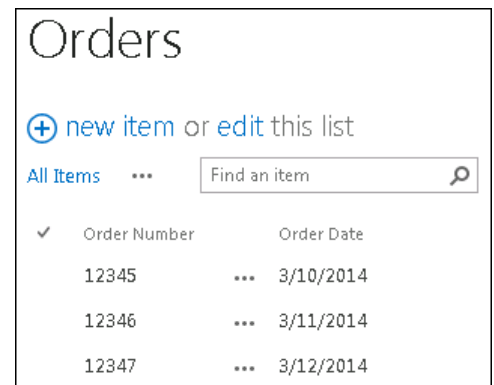


Order Number	Product	Quantity
12345	High Definition Television	1
12345	Blu-Ray Player	1
12345	Surge Protector	2
12346	Cell Phone	1
12347	MP3 Player	1

Orders list

“Orders” list has two columns:

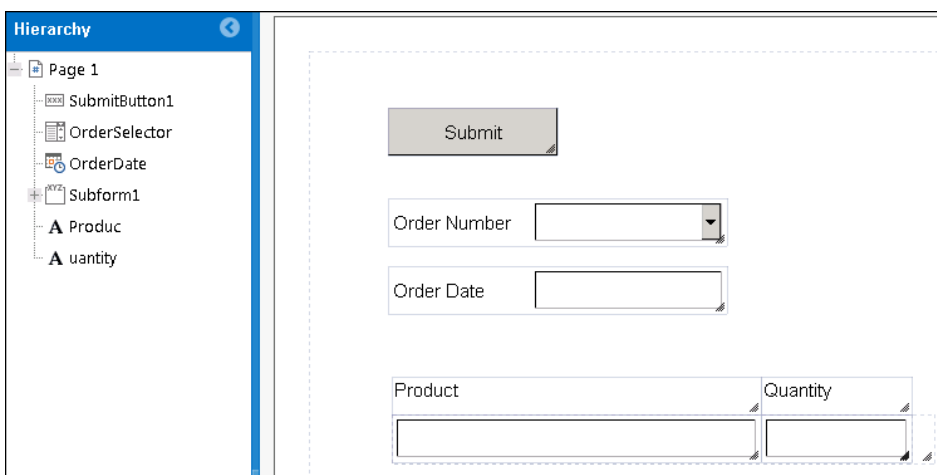
- Order Number
- Order Date



Order Number	Order Date
12345	3/10/2014
12346	3/11/2014
12347	3/12/2014

Both lists have same column – “Order Number”. It will be used inside PDF for as criteria for populating other data.

Step 2. Preparing a template



The screenshot shows a PDF form template design tool. On the left is a 'Hierarchy' pane with the following structure:

- Page 1
 - SubmitButton1
 - OrderSelector
 - OrderDate
 - Subform1
 - Product
 - Quantity

The main workspace shows a form layout with a 'Submit' button, an 'Order Number' dropdown field, an 'Order Date' text field, and a table with two columns: 'Product' and 'Quantity'.

This template has “SubmitButton1”, “DropdownField1”, “TextField1” and repeatable section which will serve as two column table. The idea of the form is to populate “Order date” and “Product” with “Quantity” for selected “Order Number” in dropdown field.

Step 3. Adding data sources for each used SharePoint list (Developer → Date Sources):

1. For Orders list:

Data source name:	Orders										
Data Source Type:	<input checked="" type="radio"/> SharePoint List <input type="radio"/> Business Connectivity Services										
List:	Orders										
Fields:	<table border="1"> <thead> <tr> <th><input type="checkbox"/> Display name</th> <th>Internal Name</th> <th>Type</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> Order Number</td> <td>Title</td> <td>Single line of text</td> </tr> <tr> <td><input checked="" type="checkbox"/> Order Date</td> <td>Order_x0020_Date</td> <td>Date and Time</td> </tr> </tbody> </table>		<input type="checkbox"/> Display name	Internal Name	Type	<input checked="" type="checkbox"/> Order Number	Title	Single line of text	<input checked="" type="checkbox"/> Order Date	Order_x0020_Date	Date and Time
<input type="checkbox"/> Display name	Internal Name	Type									
<input checked="" type="checkbox"/> Order Number	Title	Single line of text									
<input checked="" type="checkbox"/> Order Date	Order_x0020_Date	Date and Time									

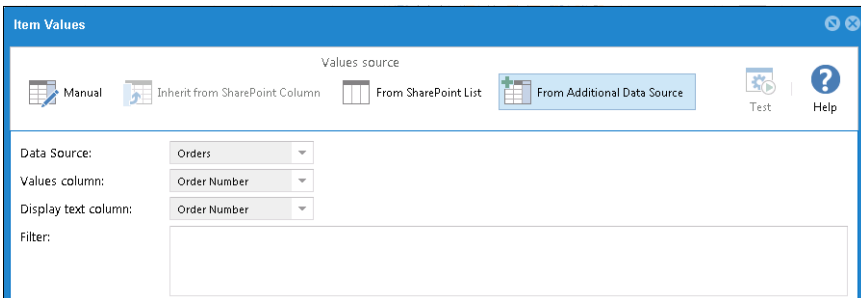
Select data source type “SharePoint List” and find in “List” dropdown field “Orders” list. Check “Order Number” and “Order Date” columns. Give name for data source (Orders) and click on Save at the bottom of the window.

2. For Orders list:

Data source name:	Products																			
Data Source Type:	<input checked="" type="radio"/> SharePoint List <input type="radio"/> Business Connectivity Services																			
List:	Products																			
Fields:	<table border="1"> <thead> <tr> <th><input type="checkbox"/> Display name</th> <th>Internal Name</th> <th>Type</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/> Product</td> <td>Title</td> <td>Single line of text</td> </tr> <tr> <td><input checked="" type="checkbox"/> Order Number</td> <td>Order_x0020_Number</td> <td>Lookup</td> </tr> <tr> <td><input type="checkbox"/> Product</td> <td>LinkTitleNoMenu</td> <td>Computed</td> </tr> <tr> <td><input type="checkbox"/> Product</td> <td>LinkTitle</td> <td>Computed</td> </tr> <tr> <td><input checked="" type="checkbox"/> Quantity</td> <td>Quantity</td> <td>Single line of text</td> </tr> </tbody> </table>		<input type="checkbox"/> Display name	Internal Name	Type	<input checked="" type="checkbox"/> Product	Title	Single line of text	<input checked="" type="checkbox"/> Order Number	Order_x0020_Number	Lookup	<input type="checkbox"/> Product	LinkTitleNoMenu	Computed	<input type="checkbox"/> Product	LinkTitle	Computed	<input checked="" type="checkbox"/> Quantity	Quantity	Single line of text
<input type="checkbox"/> Display name	Internal Name	Type																		
<input checked="" type="checkbox"/> Product	Title	Single line of text																		
<input checked="" type="checkbox"/> Order Number	Order_x0020_Number	Lookup																		
<input type="checkbox"/> Product	LinkTitleNoMenu	Computed																		
<input type="checkbox"/> Product	LinkTitle	Computed																		
<input checked="" type="checkbox"/> Quantity	Quantity	Single line of text																		

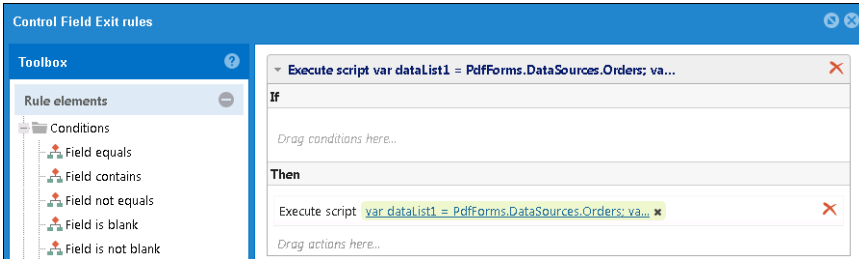
Select data source type “SharePoint List” and find in “List” dropdown field “Products” list. Check only “Product”, “Order Number” and “Quantity” columns. Give name for data source (Products) and click on Save at the bottom of the window.

Step 4. Set values for dropdown field “OrderSelector” (Properties → Item Values):



Select “From Additional Data Source” as source value, then set “Orders” data source to “Data Source” and “Order Number” in “Values column” and “Display text column”.

Step 5. Add custom script to dropdown field “OrderSelector” (Properties → Actions → Field Exit)



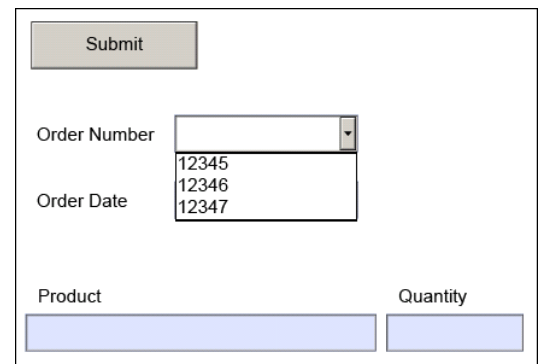
Place “Execute script” action to “Then” section and add following code:

```
var dataList1 = PdfForms.DataSources.Orders;
var i = 0;
for (i = 0; i < dataList1.length; i++){
    if (dataList1[i]['Order Number'].toString() == xfa.resolveNode("$data..OrderSelector").value){
        xfa.resolveNode("$data..OrderDate").value = dataList1[i]['Order Date'].toString();
    }
}
var count = 0;
var dataList2 = PdfForms.DataSources.Products
var repeatableNode;
repeatableNode = xfa.resolveNode('$form.Root.Default..RepeatableSubform1');
repeatableNode.instanceManager.setInstances(1);
for (i = 0; i < dataList2.length; i++){
    if (dataList2[i]['Order Number'].toString() == xfa.resolveNode("$data..OrderSelector").value){
        repeatableNode = xfa.resolveNode('$form.Root.Default..RepeatableSubform1['+count+']');
        repeatableNode.instanceManager.addInstance(count);
        repeatableNode.resolveNode("Product").rawValue = dataList2[i]['Product'].toString();
        repeatableNode.resolveNode("Quantity").rawValue = dataList2[i]['Quantity'].toString();
        count++;
    }
}
}
```

This code will check currently selected value inside dropdown field “OrderSelector” and will populate “OrderDate” field with date connected to the selected value. Also script will go through “Products” data source and populate fields on repeatable section (Product and Quantity) with values connected to currently selected “Order Number”.

Step 6. Save and deploy template, create new form

Newly created form is blank except values prepopulated to dropdown field from “Orders” list.





Step 7. Select value in dropdown field

Form fields were populated with "Order Date", "Product" and "Quantity" values connected to selected "Order Number".

Product	Quantity
High Definition Television	1
Blu-Ray Player	1
Surge Protector	2

Step 8. Try to select other value

Spare rows were deleted from previous selection, now fields are displaying information connected to newly selected "Order Number".

Product	Quantity
Cell Phone	1