

Using ADOBE® LIVECYCLE® ES4 Connector for MICROSOFT® SHAREPOINT®

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Contents

Using the Connector for Microsoft SharePoint

Connector for Microsoft SharePoint	1
Generate PDF files	1
Secure documents	1
Enable for commenting	2
Initiate LiveCycle processes	2
Use forms	2
Manage tasks	2

Using the Connector for Microsoft SharePoint

Connector for Microsoft SharePoint

Connector for Microsoft® SharePoint® 10 allows you to access LiveCycle capabilities through SharePoint.

From within SharePoint, you can perform the following LiveCycle related tasks:

- Start LiveCycle processes (for example, start an approval process from within SharePoint and convert documents to Adobe PDF)
- Generate PDF from supported document formats
- Secure documents using secure policies
- Enable PDF documents in SharePoint for commenting and other usage rights
- Manage assigned LiveCycle tasks and claim new tasks
- Integrate LiveCycle forms with SharePoint and use SharePoint as the repository for form data

Generate PDF files

- 1 Navigate to the file to convert and click the arrow to view the drop-down list.
- 2 Select **Convert to Adobe PDF**.

Note: The Convert to Adobe PDF option is available only for files that provide native application support for PDF Generator. To use this option, ensure that PDF Generator is installed on your forms server. Also, the user account configured on the SharePoint site must have rights to start services on the forms server.

The created PDF document is saved in the same location as the source document. Also, the name of the PDF file is appended based on the type of source file. For example, if you generate a PDF file for a Microsoft Word document named sample, the generated PDF document is named sample_doc.pdf.

Secure documents

Apply Rights Management policies to documents.

- 1 Navigate to the file to secure and click the arrow to view the drop-down list.
- 2 Select **Secure with Adobe Policy**.

The Secure with Adobe Policy option is available only for supported document types. To use this option, ensure that Rights Management is installed in your forms server. In addition, the user account configured on the SharePoint site must have rights to access this service.

Enable for commenting

Apply additional usage rights to PDF documents for use in Adobe Reader.

- 1 Navigate to the PDF file and click the arrow to view the drop-down list.
- 2 Select **Enable for Commenting by Adobe Reader**.

The **Apply Adobe Acrobat Reader DC extensions** option is available for PDF documents only. To use this option, ensure Acrobat Reader DC extensions is installed on your forms server. Also, the user account configured on the SharePoint site must have rights to start services on the forms server.

Initiate LiveCycle processes

Provide a document as input and initiate a LiveCycle process.

- 1 Navigate to the file and click the arrow to view the drop-down list.
- 2 Select **Invoke LiveCycle Process**.
- 3 From the **Select LiveCycle Process** drop-down list, select a process.
- 4 Click **Invoke**.

The next steps depend on the LiveCycle process that you selected. For example, if you are submitting a PDF form for approval, no further action is required on your part. If you are generating a PDF, you are prompted to provide a location for saving the PDF.

Use forms

From within SharePoint Server 2010, you can access and complete LiveCycle forms. After your system administrator completes configuration, the forms are available as SharePoint lists.

- 1 On the home page of your site, click **Lists**.
- 2 Click on the form list created by the administrator.
- 3 Click **Add new item**.
- 4 Enter the required details and click **Submit**.
- 5 Select the item and click **View Item** or **Edit Item** to view or update the entered values.

Manage tasks

From within SharePoint Server, you can claim new LiveCycle tasks and manage assigned tasks.

Claim group tasks

- 1 On the home page of your site, under Lists, click **Tasks**.
- 2 Select a task.

3 Perform one of the following:

- Click **View Item** to open the selected task in Workspace. View task details or work with the task.
- Click **Claim Task** to claim and open the task. A claimed task moves from the group task list to your task list.

Manage assigned tasks

- 1 On the home page of your site, under Lists, click **Tasks**.
- 2 Select a task, and click **View Item** it.
- 3 On the Workspace login screen, enter the credentials and click **Login**.

The selected task is opened in Workspace.

- 4 View task details or act on the task.
- 5 Close Workspace to return to SharePoint.
- 6 Refresh the page to review the task-related changes.

All completed tasks are removed from the list.