



Getting Started with Form Guides

Adobe® LiveCycle® ES
Version 8.0

July 2007

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Adobe® LiveCycle® ES 8.0 Getting Started with Form Guides for Microsoft® Windows®
Edition 1.1, July 2007

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About This Document

Welcome to Getting Started with Form Guides. This document introduces you to form guides, an alternative view of a form that guides users through the form-filling process step by step. It provides high-level information about these topics:

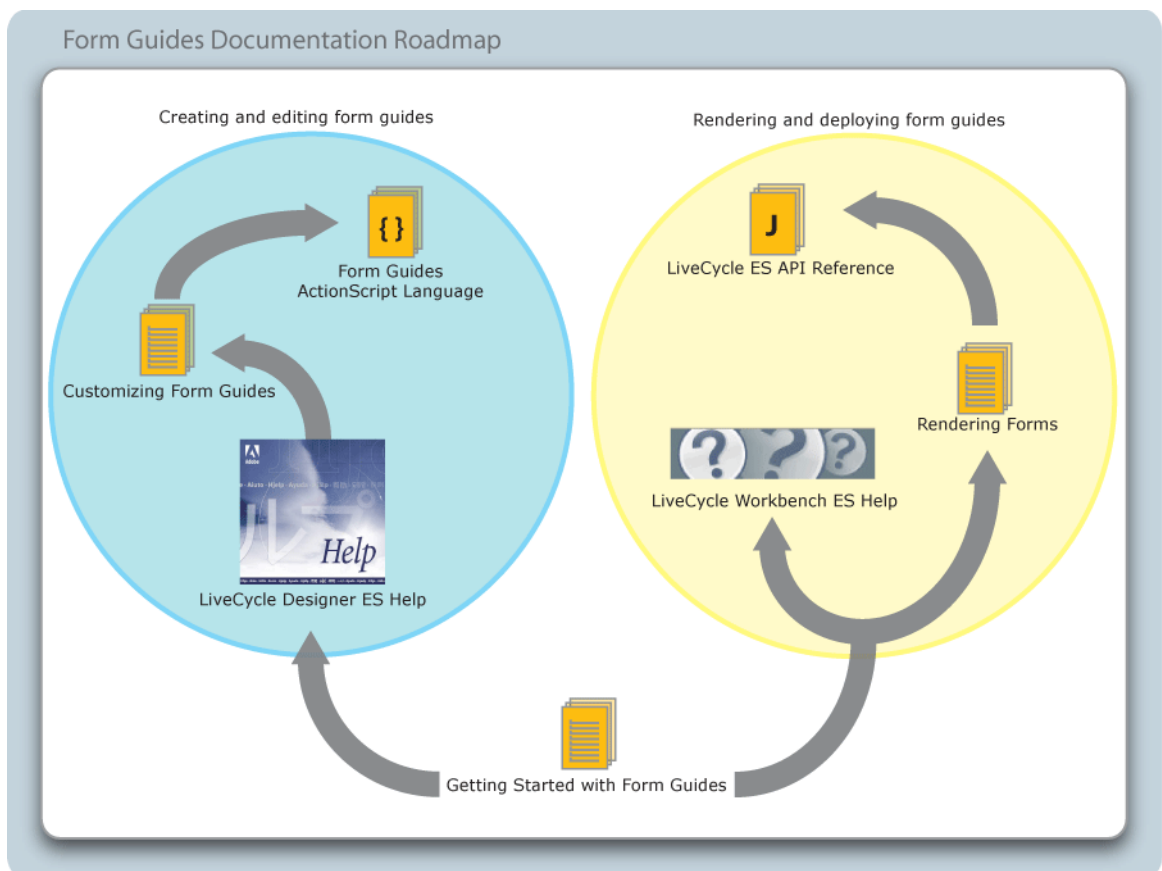
- What form guides are
- Overview of how to create, render, and deploy form guides
- A walk-through of creating a simple form guide based on a form design
- A walk-through of deploying a form guide to Adobe® LiveCycle® Workspace ES
- Overview of the process for customizing form guides

Who should read this document?

This document is intended for anyone who is interested in learning about form guides. Although no previous knowledge is assumed, you should have an understanding of Adobe LiveCycle Designer ES, Adobe LiveCycle Workbench ES, Workspace ES, and Adobe LiveCycle ES (Enterprise Suite).

Additional information

Adobe has a wide variety of resources about form guides, targeted at a variety of audiences.



To view these resources, go to the location specified in the See column in the following table.

For information about	See
Detailed information about creating and editing form guides using Guide Builder.	<i>LiveCycle Designer ES Help</i> , available within Designer ES]
Customizing form guide layouts and components using Adobe Flex™ Builder™	<i>Customizing Form Guides</i> , available at www.adobe.com/go/learn_lc_fgCustomizing
The ActionScript™ classes and properties included with LiveCycle ES.	<i>LiveCycle ES ActionScript Language</i> , available at www.adobe.com/go/learn_lc_fgActionScript
Rendering and deploying form guides using processes created in Workbench ES.	<i>LiveCycle Workbench ES Help</i> , available within Workbench ES
Rendering a form guide using the Adobe LiveCycle Forms ES API.	<i>Developing Applications Using LiveCycle ES APIs</i> , available at www.adobe.com/go/learn_lc_programming
Detailed information about the classes and methods included with LiveCycle ES.	<i>LiveCycle ES Java API Reference</i> , available at www.adobe.com/go/learn_lc_JavaAPI
LiveCycle ES terminology	<i>LiveCycle ES Glossary</i> , available at www.adobe.com/go/learn_lc_glossary
Other services and products that integrate with LiveCycle ES	www.adobe.com
Patch updates, technical notes, and additional information on this product version	www.adobe.com/support/products/enterprise/index.html

1

About Form Guides

Form guides are an alternative view of a form that guides users through the form-filling process step by step. Form guides are based on the Adobe Flash® technology. To create form guides, form authors build on an existing form design to provide a more visually appealing and streamlined method of capturing form data. The enhanced interface can help reduce data entry errors through improved usability by simplifying the amount of information presented to a form filler at a given time.

Along with the form guide you can also provide an Adobe PDF rendition of the form. The PDF often provides the contract or document of record of the transaction, which is useful for saving locally, printing, and archiving. In addition, if a digital signature is required, users sign the PDF and not the form guide.

Each form guide is a collection of layouts, sections, panels, and controls that together provide an alternative interface of a form for users to view and fill. For example, the following images show a form and a form guide that are used to collect information for an accident claim. The original form uses a more traditional layout that is consistent with a printed form, whereas the form guide uses a layout similar to those used for content on a website.

The image shows a paper form titled "MULTIPLE VEHICLE ACCIDENT CLAIM FORM". At the top, it has fields for "Policy Number" (T18982AD), "Sales Office & FRN" (Dallas, Texas FRN:13435), and "Which Vehicle" (Lotus Elise). The form is divided into two main sections. SECTION I contains fields for "Last Name of Claimant", "First Name", "Mailing Address", "City", "State" (Alabama), "Zip Code", "Birth Date", "If a Minor, Name of Parent", "Home Phone Number", and "Work Phone Number". SECTION II contains fields for "Date of Accident", "Location of Accident", "Describe Your Injuries", "Date of First Treatment", "Name of Hospital taken to", "Date of Admittance", "Date of Discharge", and "Attending Physician or Dentist". To the right of SECTION II is a "Care Expense Information" box with fields for "Hospital Expenses", "Doctor Expenses", "Other Expenses", and "Total Expenses" (showing \$ 0.00).

Original form

Form guide based on the original form

The image shows a digital form guide interface for "TLA-Life Multiple Vehicle Accident Report". It features a blue header with the TLA-Life logo and a navigation bar with tabs for "Claimant Information", "Vehicle Damage", "Accident Details", and "Processing Instructions". The "Claimant Information" tab is active, showing a form with the following fields: "Policy information" (Policy Number: T18982AD, Which Vehicle: Lotus Elise, Sales Office & FRN: Dallas, Texas FRN:13435) and "Claimant Contact Information" (First Name, Last Name of Claimant, City, State: Alabama, Zip Code, If a Minor, Name of Parent, Home Phone Number, Work Phone Number). The form includes help icons (i) and navigation buttons (<Previous, Next>). A progress bar is visible at the bottom.

Form guides provide form authors with various ways to customize and present forms to users. For example, form authors can use form guides to group required data into logical groups called *sections*. Form authors select a form guide layout that defines the presentation of sections and dictates how users navigate between sections. Each section is composed of one or more panels that contain a set of fields from the original form and any form guide navigational controls, such as Previous or Next buttons. The form guide then steps users through data entry by section. In each section, form authors can display help text or video to provide assistance to users with filling the fields in that section. Form authors can also set rules to control the display of optional sections based on user-entered data. When the form guide is completed, users can submit their form, either electronically or by printing a paper copy, according to the submission method defined by the form guide.

In addition to the presentation enhancements that form authors can implement, form authors can import existing cascading style sheet (CSS) files to assist in creating a form guide appearance that is consistent with existing materials.

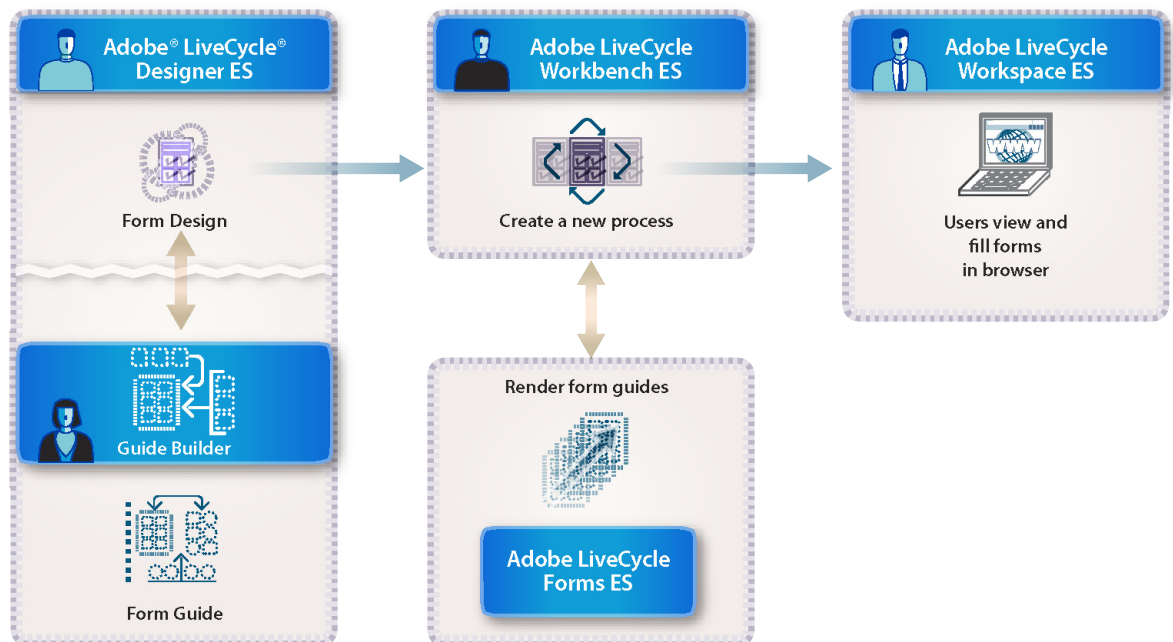
Each form guide is derived from a form, and data collected in a form guide automatically passes through to the form itself. Therefore, most scripts, validations, and other business logic on your form will continue to function on a form guide. For detailed information about form guide scripting support, see *LiveCycle Designer ES Help*.

2

Creating, Rendering, and Deploying Form Guides

Form guides are integrated throughout LiveCycle ES. The process of creating, rendering, and deploying form guides involves various LiveCycle ES solution components as well as various skill sets. The image below illustrates the general process of creating, rendering, and deploying form guides as part of a LiveCycle ES solution. This process involves these tasks in the order shown:

1. Form authors create a form guide based on an existing form design by using Guide Builder in Designer ES.
2. After a form guide is created, a developer creates a new process in Workbench ES that includes a call to Adobe LiveCycle Forms ES to render the form design as a form guide (SWF file).
3. Using Workspace ES, the rendered form guide is made available to end users to view, fill, and submit.



Note: You can also deploy form guides by creating a custom Java™ or web services application that calls the API for Forms ES to render a form guide. See [Deploying form guides](#).

Creating form guides

You create and edit form guides by using Guide Builder in Designer ES. Creating a form guide involves these general tasks in Guide Builder:

- Adding new sections and panels
- Dragging and dropping the form objects that will appear in each panel
- Changing the layout of the form guide and the individual panels
- Modifying the color of buttons, text, and backgrounds
- Specifying rule-based or answer-based conditional navigation of form guide panels based on form data or feedback
- Previewing your form guide in a web browser
- (Optional) Importing custom CSS or SWC files to share styles among form guides
- (Optional) Importing custom Flex library SWC files that contain custom form guide layouts, panels, or controls for use with your form guide

For more information about Guide Builder and creating form guides, see *Adobe Designer ES Help*. For a general introduction to creating a new form guide, see [“Walking Through Creating a New Form Guide” on page 11](#).

Rendering form guides

The process for rendering form guides is similar to the process used to render forms in PDF or HTML. You must create a new process in Workbench ES that uses the form guide rendering operation `renderFormGuide`. For more information about how to render a form guide by using the Forms service within Workbench ES, see [Using a Form Guide in Workspace ES](#).

It is also possible to call the API for Forms ES outside of Workbench ES by using either a Java or web services-based application. For more information, see *Developing Applications Using LiveCycle ES API* at http://www.adobe.com/go/learn_lc_programming.

Deploying form guides

When deploying a form guide in a LiveCycle ES solution, you can give users the ability to fill the form guide directly from their To Do lists within Workspace ES. To enable this functionality, you create a process in Workbench ES that includes a step to render a form design as a form guide. The process is deployed to Workspace ES where form fillers can view, fill, and submit the rendered form guide. For more information about deploying processes to Workspace ES, see [Using a Form Guide in Workspace ES](#).

You can also deploy form guides by using a Java or web services application. The application first calls the API for Forms ES to render a form design as a form guide and then returns the rendered form guide to a user either in a browser or by making the necessary files available in a publicly accessible URL. For more information, see [Developing Applications Using LiveCycle ES APIs](#).

3

Walking Through Creating a New Form Guide

This section walks you through the process involved in creating a new form guide from an existing Designer ES form design.

Getting started

The first step in creating a form guide is to start Designer ES and either open an existing form design or create a new form design within Designer ES. After you create and save your form design, you create a new form guide by following these general steps:

- Start Guide Builder.
- Define the form guide structure.
- Preview your form guide to verify the structure.
- Customize the appearance and behavior of the form guide.
- Save the form guide style information and apply the form guide updates to the form design.

Note: To correctly preview form guides in a web browser, you must have Adobe Flash® Player 9.0.28.0 or later installed.

Sample form design

Throughout this chapter, you will use a mortgage application form as an example. The mortgage application form illustrates an electronic form that is based on an original paper form design.

The sample mortgage application form uses conventions and layout techniques that are logical in situations where the form needs to be printed. However, those same conventions limit the online data entry experience. For example, all of the form fields are arranged on one side of a sheet of paper. Due to the space restriction, text size has been kept small and is difficult to read when viewing the entire form at once. The form is divided using plain white rectangles, and more meaningful text is not noticeable due to the space required for data entry.

The following image illustrates what the mortgage application form looks like when viewed in PDF.

Finance corporation MORTGAGE APPLICATION Submit

Applicants should complete this form as "Applicant" or "Co-Applicant" as applicable. Co-applicant information must be provided when the income or assets of a person other than the Applicant (including the Applicant's spouse) will be used as a basis for loan qualification.

Is this an individual (no co-applicant) or joint (with a co-applicant) loan application? Individual Joint

Applicant		I. APPLICANT INFORMATION		Co-Applicant	
Applicant First Name		Applicant Last Name		Co-Applicant First Name	
Social Security Number		Home Phone (incl. area code)		Co-Applicant Last Name	
Social Security Number		Home Phone (incl. area code)		Social Security Number	
Home Phone (incl. area code)		Street Address		Home Phone (incl. area code)	
Street Address		City		Street Address	
City		State		City	
State		E-Mail Address		State	
E-Mail Address		E-Mail Address		E-Mail Address	

II. LOAN INFORMATION

In what state will you be purchasing the home? Alabama Will you be applying for optional Life Insurance? Yes No
If life insurance is selected, your loan document package will contain a Life Insurance section.

III. TERMS OF LOAN

Purchase Price	Down Payment	Term (years)	No. Months	Interest Rate	Amortization Type
\$	\$	15			<input type="radio"/> Fixed <input type="radio"/> GPM <input type="radio"/> ARM
Principal	Monthly Payment	If your down payment is less than 20% of the purchase price, a Mortgage Insurance section must be filled to compete the application after submission.			
\$	\$				

Applicant		IV. APPLICANT INCOME INFORMATION		Co-Applicant	
Income Type 1	Amount	Income Type 1	Amount	Income Type 1	Amount
	\$		\$		\$
Income Type 2	Amount	Income Type 2	Amount	Income Type 2	Amount
	\$		\$		\$

Applicant		V. APPLICANT ASSET INFORMATION		Co-Applicant	
Asset Type 1	Amount	Asset Type 1	Amount	Asset Type 1	Amount
	\$		\$		\$
Asset Type 2	Amount	Asset Type 2	Amount	Asset Type 2	Amount
	\$		\$		\$

Applicant		VI. APPLICANT LIABILITY INFORMATION		Co-Applicant	
Liability Type 1	Amount	Liability Type 1	Amount	Liability Type 1	Amount
	\$		\$		\$
Liability Type 2	Amount	Liability Type 2	Amount	Liability Type 2	Amount
	\$		\$		\$

FOR OFFICE USE ONLY:

Application Status: Approved Rejected

This situation is typical where a form guide could be created to greatly improve a user's online form-filling experience. In the next steps, you will walk through converting this form to a form guide.

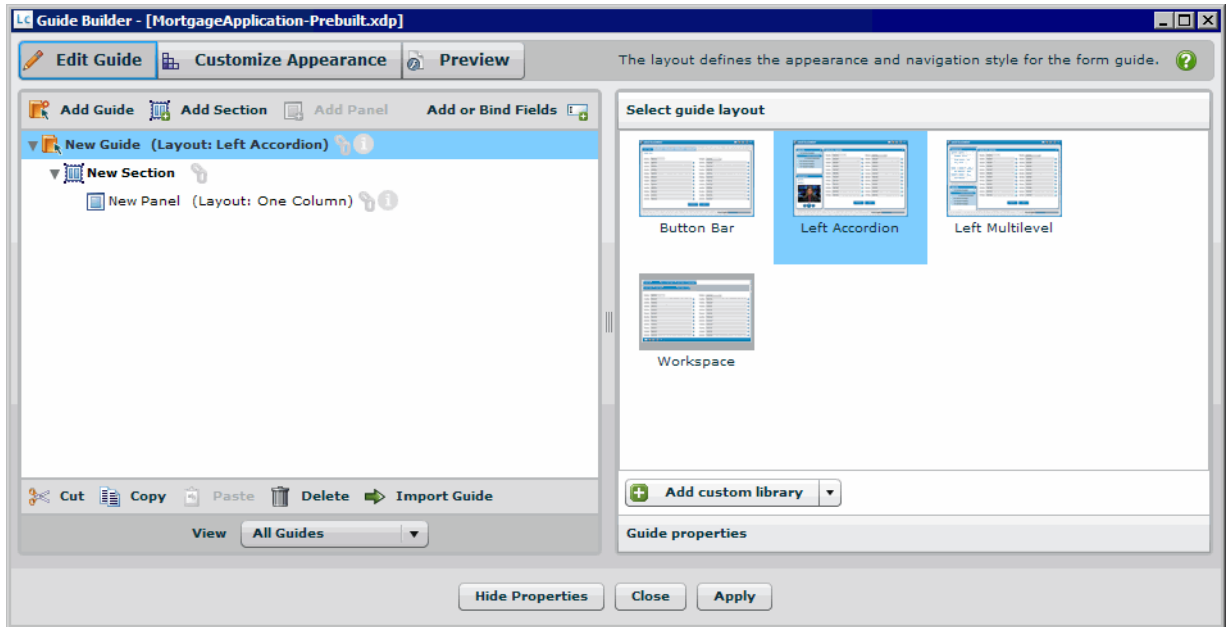
Step 1: Starting Guide Builder

After you open or create a form in Designer ES, the first step is to start Guide Builder. Guide Builder is the tool within Designer ES that you will use to create and edit form guides.

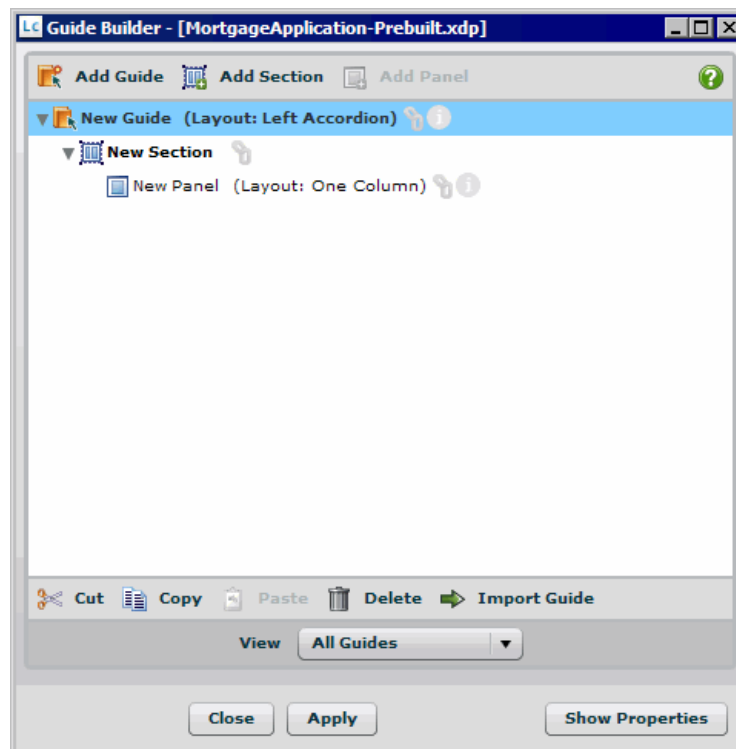
Each time you start Guide Builder, it opens in the default expanded view. From the expanded view, you can access all of the features of Guide Builder, such as customizing the appearance and behavior of your form guide and previewing the form guide in a web browser.

► **To start Guide Builder**

1. Start Designer ES.
2. Open a form design (either an XDP file or a PDF file) created in Designer ES.
3. Select **Tools > Create or Edit Form Guide**.



To change to the simplified view, click Hide Properties. From this view, you can modify the structure of your form guide, and drag text and field objects directly from your form design onto sections and panels.



Note: The default behavior of the Guide Builder window is not to remain on top of other applications. To change the behavior to always be on top, right-click and select Always On Top.

Before experimenting with the various Guide Builder options, you should first consider how you want to logically structure your form guide to collect user data.

Step 2: Creating the form guide structure

The most important aspect of creating a new form guide is determining what information you need to collect from your users. Your original form design likely contains fields for capturing all of the necessary data; however, it may contain additional fields or information that is unnecessary for some form fillers. For example, the mortgage application form contains fields that record the status of the mortgage application, either Accepted or Rejected, in a section marked For Office Use Only. These fields can be omitted from the form guide because they are not relevant to the user filling the form.

When you determine what information you need to collect, you must consider how to arrange the various text and fields from your original form. A form guide is organized into a hierarchy that consists of three different types of containers:

Guide At the highest level, a *guide* stores all of the information for a particular form guide. You can create multiple form guides for each form design to handle different scenarios. For example, you can create one guide for a mortgage applicant, another for a mortgage broker, and another for a bank manager.

Section Within a guide, you create one or more *sections*, which contain *panels*, which are used to organize into logical categories the information that you display to users. For example, you can divide the mortgage application into sections for the applicant information and loan information.

Panel Each section contains one or more panels, which are the containers into which you will add or link text and fields from your original form, such as the form fields for the applicant name, address, and telephone number.

► **To add a guide, section, or panel to the form guide hierarchy:**

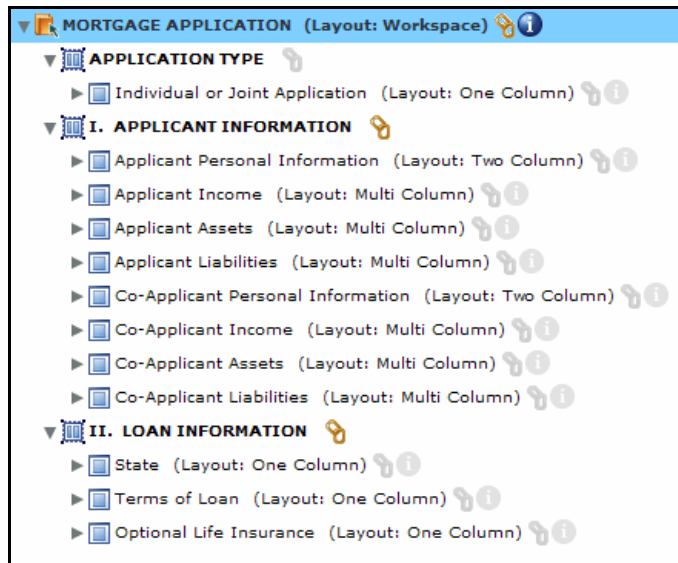
- Click **Add Guide**, **Add Section**, or **Add Panel** to add the corresponding item to the form guide hierarchy.

► **To add text objects and fields to a panel:**

1. In the Guide Builder expanded view, click **Add or Bind Fields**.
2. Drag objects from the Form Objects view onto panels in the form guide hierarchy.

Using the mortgage application example, the following image illustrates one way to structure a form guide based on the original form design. In this example, a new section was created for six of the seven sections on the form design. Within each section, where appropriate, the structure includes separate panels to display the applicant and co-applicant information. The seventh section, named Signatures And

Processing, is omitted from the form guide because it requires users to digitally sign the form, which is an operation they can only perform on the PDF.



Linking field captions

On some forms, such as the mortgage application example, field captions may exist as separate text objects instead of text entered specifically as the caption of a data entry field in Designer ES. In these situations, you can link the text from a text object to the caption of a data entry field or even the name of a guide, section, or panel by dragging the text object onto the link icon for the associated field.

Notice that in the preceding illustration that some captions are linked and some are not. The link icon is available when a link exists.

► To link text from a text object to an item in the form guide hierarchy:

1. In the Guide Builder expanded view, click **Add Or Bind Fields**.
2. In the Form Objects hierarchy, select the text object to bind.
3. Drag the text object onto one of the following items in the form guide hierarchy:
 - Field
 - Panel
 - Section
 - Guide

The link symbol beside the item in the form guide hierarchy is no longer grayed out is now available, indicating that the object is now bound to a text object.

After you create the structure of your form guide and add all relevant text and fields from your form design, you can preview your progress and visualize how users will interact with the form guide. At this point, the preview will only use default Guide Builder options. Later, you can customize the appearance of your form guide to suit your specific needs.

Step 3: Previewing your form guide

You can preview your form guide at any time in the expanded Guide Builder view by clicking the Preview button in the title bar. When you preview, Guide Builder renders your form guide as a SWF file and displays it in your default web browser.

Note: To correctly preview form guides in a web browser, you must have Flash Player 9.0.28.0 or later installed.

If you are using Microsoft® Internet Explorer, depending on your internet browser security settings, you may need to manually allow form guides to be displayed each time you preview. You can disable this behavior by starting Internet Explorer, selecting Tools > Internet Options > Advanced > Security, and selecting Allow Active Content To Run In Files On My Computer.

When previewing, Guide Builder displays warnings or errors, as well as log information, that occur during form guide rendering to help with debugging. If you encounter problems related to scripting, you can optionally turn off all scripting on your form guide by using the Exclude Scripting option in the Preview view. This allows you to temporarily ignore scripting errors so that you can debug the other areas of your form guide.

Using the mortgage application example, the following image illustrates preview output using default Guide Builder settings.

After you define the structure of your form guide, you can alter the appearance and behavior by using the customization capabilities of Guide Builder.

Step 4: Customizing your form guide

Using Guide Builder, you can modify the appearance and behavior of your form guide at both the guide level and the panel level, and you can also modify the appearance of text, fields, logos, and other form guide components.

Form guide and panel layouts

The visual customization that affects the form filler the most is applying layouts at the guide and panel levels within the form guide. Guide layouts specify the type of navigation control that the form guide uses and the placement of the navigational hierarchy, guide help text, and data entry panels. Panel layouts specify the flow of data within a single data entry panel.

By default, Guide Builder uses the Left Accordion guide layout for the form guide and the One Column panel layout for all panels within the form guide. The image of the mortgage application example in [Step 3: Previewing your form guide](#) illustrates the appearance of these default layouts.

► **To apply a new guide layout:**

1. In the Guide Builder expanded view, click **Edit Guide**.
2. In the form guide hierarchy, select the guide container.
3. If it is not already displayed, click **Select Guide Layout**.
4. Select a form guide layout.

► **To apply a new panel layout:**

1. In the Guide Builder expanded view, click **Edit Guide**.
2. In the form guide hierarchy, select the panel container whose layout you want to change.
3. If it is not already displayed, click **Select Panel Layout**.
4. Select a form guide layout.

Form guide properties

At the guide container level, in addition to specifying a guide layout, specify any preferred behaviors for the form guide, including these behaviors:

- Visual effects that are displayed when the form guide initially renders in a browser
- Visual transitions that appear when navigating through the panels
- Form guide help text
- How data from the form guide is submitted from the form guide itself, from the PDF form, as a printed PDF, or from a hosted application such as Workspace ES.

Note: If you choose to submit data from the form guide, you do not have to specify the submit button that will submit the data unless you have defined additional data processing on the submit button.

► **To view and change form guide properties:**

1. In the Guide Builder expanded view, click **Edit Guide**.
2. In the form guide hierarchy, select the guide container.
3. If it is not already displayed, click **Guide Properties**.
4. Change form guide properties as necessary.

Panel properties and display rules

At the panel container level, in addition to specifying a panel layout, specify any properties for the panel. However, unlike guide containers, in addition to properties, you can set certain display rules for panels that allow them to be displayed only in specific situations. For example, you can specify that a certain panel is displayed only when a field value is true. You can also create answer-based navigation by specifying simple questions that appear after a form filler navigates from the current panel to another panel. The answer-based navigation allows you to control which panel to present to the form filler based on how the form filler answers the question. For example, asking a form filler whether there is a co-applicant for the loan can eliminate displaying co-applicant related information.

► **To view and change panel properties and display rules:**

1. In the Guide Builder expanded view, click **Edit Guide**.
2. In the form guide hierarchy, select a panel container.
3. Click **Set Panel Properties** and change any of the panel properties.
4. Click **Specify Panel Display Rules**, select **Use Display Rules**, and add any display rules.
5. Click **Specify Answer-Based Navigation** and add any questions.

Visual appearance

Using Guide Builder, you can set the color schemes for all aspects of a form guide, including these:

- Form guide borders and backgrounds
- Form guide help and panel help
- Panel borders and backgrounds
- Buttons
- All levels of the form guide navigation tree
- Progress bar
- Colors and fonts of all form guide text

Note: Guide Builder resets all form guide style information if you select a new form guide layout. You must save your style information in either a CSS file or a SWC file to reuse or share the information.

► **To customize the visual appearance of your form guide:**

1. In the Guide Builder expanded view, click **Customize Appearance**.

2. Browse through the following accordion menus and change any color and font options:

- Customize Guide, Logo, And Progress Bar
- Customize Panels
- Customize Field And Text
- Customize Buttons and Repeater Layouts
- Customize Navigation

When you make changes to the visual appearance of your form guide, before you can apply your form guide changes or return to your form guide hierarchy, you will be prompted to save your form guide style changes. For more information, see ["Step 5: Saving your form guide" on page 19](#).

Step 5: Saving your form guide

If you have not made any style changes, you can save your form guide at any time by clicking Apply. This action stores the form guide information within the original form design.

Note: Even after you have applied your form guide to the original form design, you must also save the original form design in Designer ES to save your form guide for future design sessions.

When you make changes by using the Customize Appearance view in Guide Builder, you must save your style changes before applying your form guide changes or returning to the form guide hierarchy. All style information is saved in an external SWC file which must be stored and deployed with the form design that contains the form guide.

After you save your form guide, close Guide Builder and save your form design in Designer ES.

Next steps

After you create a form guide, you must render and deploy it to your users. [Using a Form Guide in Workspace ES](#) discusses rendering and deploying form guides to your users by using processes created in Workbench ES.

For more information, see the Form Guides Documentation Roadmap in the section [Additional information](#).

4

Using a Form Guide in Workspace ES

This section introduces you to the steps involved in rendering and deploying form guides to Workspace ES by using a process created in Workbench ES. This section only briefly introduces the form guide rendering and deployment options that are available. For more information, see *LiveCycle Workbench ES Help* at http://www.adobe.com/go/learn_lc_workbench.

Prerequisites

It is assumed that you have already created your first LiveCycle ES application using [Creating Your First LiveCycle ES Application](#) or that you are already familiar with creating a process diagram.

In addition, you must have completed these tasks before you proceed with this walk-through:

- Installed and configured Workbench ES, where you will create the process.
- Acquired access to Workspace ES with the appropriate permissions.
- Created a form guide from an existing form design using Guide Builder, a tool within Designer ES. Guide Builder includes a default form guide layout called Workspace that is configured to present a form guide in a way that is visually consistent with the Workspace ES interface. For more information about creating a form guide, see [Walking Through Creating a New Form Guide](#).

Example form design

Throughout this section, you will use a mortgage application form as an example. The mortgage application form design illustrates an electronic form that is based on an original paper form. For more information about the mortgage application example form design, see [Walking Through Creating a New Form Guide](#).

Getting started

Before you can begin to create a process that incorporates a form guide, you must ensure that you have completed the following tasks:

- Added the form design that contains your form guide and the form design asset files, such as your SWC file and associated image files, to the LiveCycle ES repository. For more information, see [Adding your form design and assets to the repository](#).
- Imported the LiveCycle ES samples as part of the LiveCycle ES installation. To complete this chapter, you must use the Render Form Guide and Submit Form Guide processes located in the Samples - Forms category in Workbench ES.

Adding your form design and assets to the repository

To include a form guide in a process, you must first add the associated form design and its assets to the LiveCycle ES repository. Assets include image files used on the form design, even if they are embedded into the form design, associated schema files, and form guide style information saved in a SWC file. Your form design and its asset files must exist within the repository in the same relative folder structure as they did when the form design was created. For example, if you stored the form guide style information in

either a CSS file or a SWC file that existed in the same folder as the form design, both files must exist in the same folder in the repository.

► **To add your form design and assets to the LiveCycle ES repository:**

1. Start Workbench ES.
2. Select **File > Login** and log in to LiveCycle ES.
3. In Workbench ES, select the **Resources** view. If the **Resources** view is not displayed, select **Window > Show Views > Resources**.
4. (Optional) To create a folder or folders to store your form design and its assets, in the **Resources** view, right-click and select **New Folder**, type a unique name for the folder, and then click **OK**.
5. Drag your form design from the location on your local file system into the **Resources** view and place it in the appropriate location.
6. Repeat Step 5 for all asset files associated with the form design.

After the form design and associated assets are added to the repository, users can make changes by using the stand-alone version of Designer ES and dragging the updated files into the repository, or by using the Adobe Form Design perspective within Workbench ES.

Creating a new process to deploy a form guide

After you complete all of the steps in the [Getting started](#) section, you are ready to create a simple process that you can deploy to Workspace ES. In this example, you will create a process that renders a form guide to a user in Workspace ES and then routes the submitted form guide back to the user who initiated the process.

In general, to create a process that deploys a form guide, you must complete the following tasks:

- [Drawing a process diagram](#)
- [Creating an xfaForm variable](#)
- [Updating your process to use the xfaForm variable](#)
- [Activating your process](#)

When you have finished creating your process, you must configure it using LiveCycle Administration Console to make it available in Workspace ES.

Drawing a process diagram

A process diagram is the visual representations of the business process that is being automated. For the purposes of this walk-through, we are using a simple example of a process diagram that has a single operation that assigns everything back to the user who initiated the process within Workspace ES.

For more information about constructing process diagrams, see “Creating Processes” in *LiveCycle Workbench ES Help*.

► **To construct a new process diagram:**

1. Select **File > New > New Process**.

2. Ensure that **Create A New Process** is selected and click **Next**.
3. Assign the process a unique name, category, and description, and then click **Finish**. For example, using the Mortgage Application form, type the following values:
Name: Mortgage Application - Prebuilt
Category: Mortgage Application
Description: Mortgage application process for the prebuilt example
4. Click **Finish**.
5. In the **Services** view, select **Process Management > User** and drag the **Assign Task** operation into your process diagram.
6. In the **Properties** view, expand the **General** section and assign the operation a unique name. For example, type `Fill and submit the mortgage application form guide` as the name.
7. In the **Properties** view, expand the **Initial User Selection** section and select **Assign To Process Creator**.
8. Save your process diagram.


After you have created your process diagram, you must create and configure a new xfaForm variable for the operation in your process. For more information, see [Creating an xfaForm variable](#).

Creating an xfaForm variable

When you implement your process, you create a variable of type xfaForm to point to the form you want to use in your process. The xfaForm variable specifies the form design you want to render as a form guide, and also specifies the processes that will be used to render the form guide and handle the data submission in Workspace ES

For more information about xfaForm variables, see "Creating xfaForm variables" in *LiveCycle Workbench ES Help*.

► To create an xfaForm variable for your process:

1. Select the process you created in the section [Drawing a process diagram](#).
2. In the **Variables** view, click **Create New Variable** .
3. Assign the variable a unique name, title, and description. For example, you could use the following values:
Name: fgVar
Title: Mortgage Application Variable
Description: Mortgage application xfaForm variable.
4. In the Type list select **xfaForm**.
5. In the **General** section, select **Required** and select **Input**.
6. In the **Data Type Specific Settings** section, type the LiveCycle ES repository folder path and file name of the form design to include in your process.

7. Click **Advanced Settings**, click **Browse**, select the invoke operation of the Render Form Guide process located in the Samples - Forms category, and then click **OK**.
8. In the **Service Input** section, do the following tasks:
 - For the **formUrl** parameter, select **task** from the first list and select **Form URL** from the second list.
 - For the **inDocData** parameter, select **task** from the first list and select **Form Data** from the second list.
 - For the **targetURL** parameter, select **Custom Configuration** from the first list and select **targetUrl** from the second list.
 - For the **userAgent** parameter, select **Custom Configuration** from the first list and select **userAgent** from the second list.
9. In the **Service Output** section, do the following tasks:
 - For the **outFormDoc** parameter, select **task** from the first list and then **Document** from the second list.
10. Click the **Submit Service** tab, click **Enable Submit Service**, click **Browse**, select the **invoke** operation of the Submit Form Guide process located in the Samples - Forms category, and then click **OK**.
11. In the **Service Input** section, do the following tasks:
 - For the **document** parameter, select **task** from the first list and select **Submitted Content** from the second list.
 - For the **environmentBuffer** parameter, select **Custom Configuration** from the first list and select **environmentBuffer** from the second list.
 - For the **targetUrl** parameter, select **Custom Configuration** from the first list and select **targetUrl** from the second list.
 - For the **userAgent** parameter, select **Custom Configuration** from the first list and select **userAgent** from the second list.
12. In the **Service Output** section, do the following tasks:
 - For the **outputDocument** parameter, select **task** from the first list and select **Form Data** from the second list.
13. Click **OK**, and then click **OK** again.

After you have created your xfaForm variable, you must configure your process to use the new variable for data mapping. For more information, see [Updating your process to use the xfaForm variable](#).

Updating your process to use the xfaForm variable

After you have created the xfaForm variable, you must update the operation in your process diagram to use the variable for input and output data mapping.

Caution: If you do not configure your operation to use the xfaForm variable for data mapping, unexpected results may occur in Workspace ES when a form is submitted.

► To assign the xfaForm variable for input and output data mapping:

1. Select the operation in the process diagram you created in the section [Drawing a process diagram](#).

2. In the **Properties** view, expand the **Form Data Mappings** section and type the path to your xfaForm variable in the **Input Form Variable** and **Output Form Data** fields. For example, you can assign the following values:

Input Form Variable: /process_data/fgVar

Output Form Data: /process_data/fgVar

3. Save your process diagram.

At this point, all that remains is to activate your process to make it available to Workspace ES. For more information, see [Activating your process](#).

Activating your process

The last step in creating your process is to make it available to Workspace ES by activating it in Workbench ES. For your process to work correctly, the render and submit processes you specified in the [Creating an xfaForm variable](#) section must also be activated in Workbench ES. If they are not, activate them by following the procedure below.

► **To activate your process:**


- In the **Processes** view, right-click your process and select **Activate**.

Deploying a process to Workspace ES using Archive Administration

After you finish creating your process, you must create a new Workspace ES category and set an endpoint using Archive Administration.

For more information about using Archive Administration, see *Archive Administration Help* in LiveCycle Administration Console.

► **To create Workspace ES category and endpoints using Archive Administration:**

1. Start LiveCycle Administration Console and log in using administrator privileges. By default, the URL of the LiveCycle Administration Console is `http://servername:8080/adminui/`.
2. From the Home page, click **Services > Archive Administration > Category Management**.
3. Click **Add** .
4. Type a unique category name and a description. For example, you could use the following values:
Name: Mortgage Application
Description: A prebuilt form guide mortgage application example.
5. Return to Archive Administration and click **Service Management**.
6. Locate your process and select it from the list.
7. On the **Configure Mortgage Application - Prebuilt** page, click the **End Points** tab and select **TaskManager** from the list.
8. Click **Add**.

9. Type a unique endpoint name, a description, and any task instructions. For example, you could use the following values:
 - Name:** Mortgage Application - Prebuilt
 - Description:** A prebuilt example of a mortgage application form guide.
 - Task Instructions:** Fill and submit the mortgage application form.
 - Categorization:** Mortgage Application
 - Operation Name:** invoke
10. In the **Categorization** list, select the category you created in Step 6 and, in the **Operation Name** list, select **invoke**.
11. Click **Add**.
12. Click the **Security** tab and click **Add Principal**.
13. Select the entry named **All Principals**, select the **INVOKE_PERM** permission, and then click **Add**.
The process is now available for all users to initiate from within Workspace ES.

Testing in Workspace ES

When a process is available in Workspace ES, users can initiate the process and test to verify that process routing, form guide rendering, and data handling are working correctly. To view a form guide in Workspace ES, users must be members of the Workspace ES role. For information about adding users to the Workspace ES role, see *LiveCycle Workbench ES Help*.

► To test your form guide using Workspace ES:

1. Start Workspace ES and log in.
2. Click **Start Process**.
3. Select the new category you created and click the corresponding process. For example, select the Mortgage Application category and click the Mortgage Application - Prebuilt process.
The form guide renders on the Form tab within Workspace ES.
4. Fill out the form guide and then click **Complete**.
5. In Workspace ES, click **To Do**.
6. Click the form in the process, verify that the data you entered appears correctly, and then click **Complete**.

Next steps

To learn more about additional documentation related to form guides, see the Form Guides Documentation Roadmap in the section [Additional information](#).

5

Customizing Form Guides Using Flex Builder

Guide Builder in Designer ES provides a number of ways for you to customize the appearance and behavior of form guides. However, advanced developers can choose to customize their form guides in the following ways:

- Creating custom CSS files that you can import into Guide Builder to quickly update form guide styles and easily share styles across multiple form guides.
- Creating custom form guide layouts, panel layouts, and controls by using Flex Builder. Flex Builder is an open-source integrated development environment (IDE) built on the Eclipse workbench.

Note: Creating customized form guide layouts, panel layouts, and controls is optional. Only advanced users who have a thorough knowledge of Flex Builder should attempt to modify form guide components in Flex Builder.

For more information about customizing form guides by using a CSS file or Flex Builder, see *Customizing Form Guides* at www.adobe.com/go/learn_lc_fgCustomizing.

For more information about using Flex Builder, go to www.adobe.com/go/learn_lc_Flex.

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