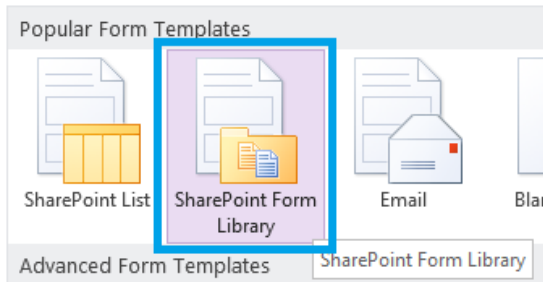


InfoPath to PDF conversion

Creating a SharePoint Form Library

Create a new Form Library in SharePoint:



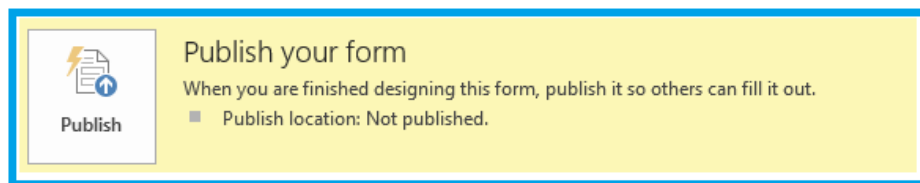
Design your Form using InfoPath:

A screenshot of the InfoPath form design grid. At the top is a 'Form Title' section. Below it is a 'First heading' section. The main area is a table with four columns. The first column contains text labels: 'Type text:', 'Select a date', and two empty rows. The second column contains input controls: a text box, a date picker, and two empty rows. The third column contains 'Add label' text, and the fourth column contains 'Add control' text.

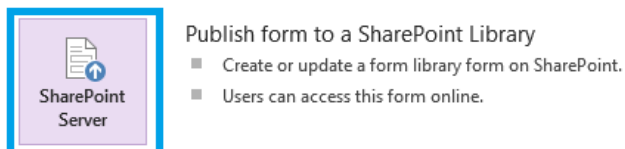
Save your form to a file, and then publish it to SharePoint:

Info

Location: C:\Users\Administrator\Documents\InfoPathForm1.xsn



Select to publish it to SharePoint site:



Enter the location of your SharePoint site:

Publishing Wizard ? X

Enter the location of your SharePoint or InfoPath Forms Services site:

▼

Example: <http://www.example.com>

< Back Next > Cancel

Select to publish it as a template in a form library:

Publishing Wizard ? X

☒ Enable this form to be filled out by using a browser

What do you want to create or modify?

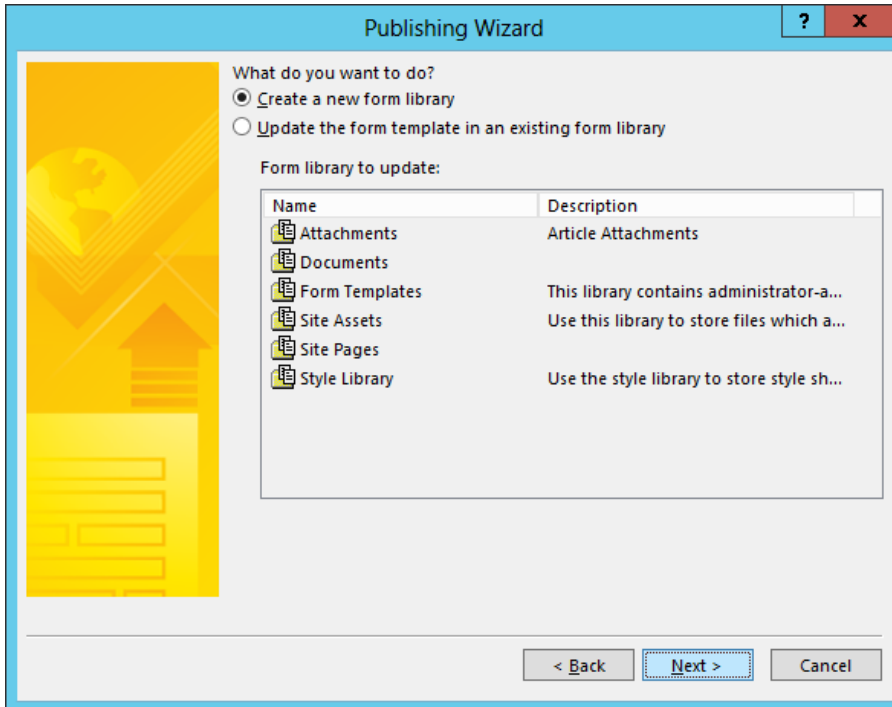
☒ **Form Library**
Publish this form template as a template in a form library. A form library stores forms based on this form template. Users can open and fill out forms in the library. You can specify which fields in the template appear as columns in the library.

☐ **Site Content Type (advanced)**
A site content type allows this form template to be used in multiple libraries and sites. You can specify which fields in the template appear as columns in the library.

☐ **Administrator-approved form template (advanced)**
Prepare this form template for an administrator approval.

< Back Next > Cancel

Select to create a new form library:

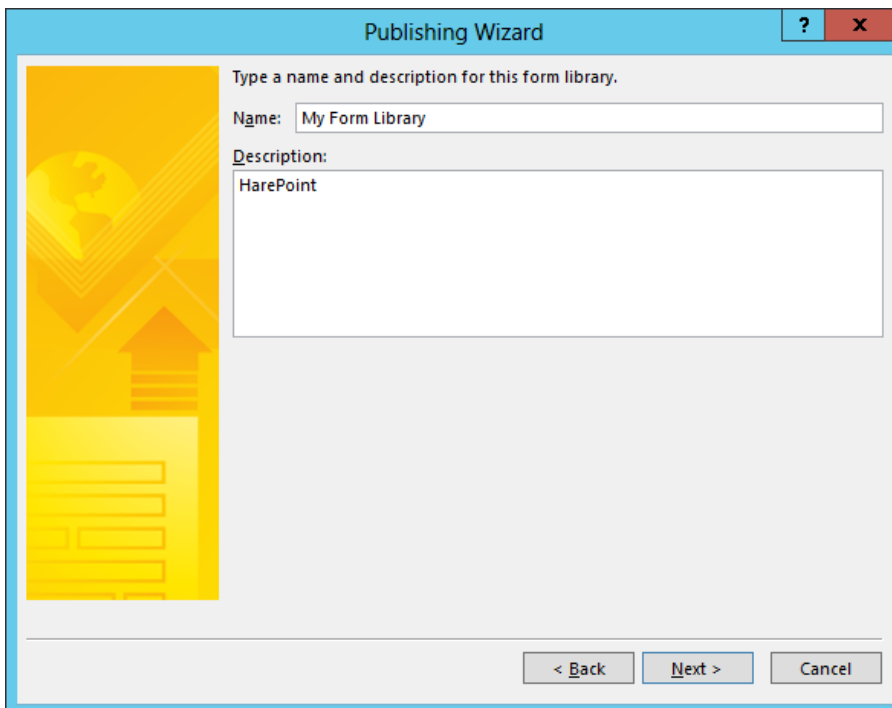


The Publishing Wizard dialog box is shown with the title bar 'Publishing Wizard' and standard window controls. The main area has a yellow decorative graphic on the left. The text 'What do you want to do?' is followed by two radio buttons: 'Create a new form library' (selected) and 'Update the form template in an existing form library'. Below this is a section 'Form library to update:' containing a table with two columns: 'Name' and 'Description'.

Name	Description
Attachments	Article Attachments
Documents	
Form Templates	This library contains administrator-a...
Site Assets	Use this library to store files which a...
Site Pages	
Style Library	Use the style library to store style sh...

At the bottom are three buttons: '< Back', 'Next >' (highlighted), and 'Cancel'.

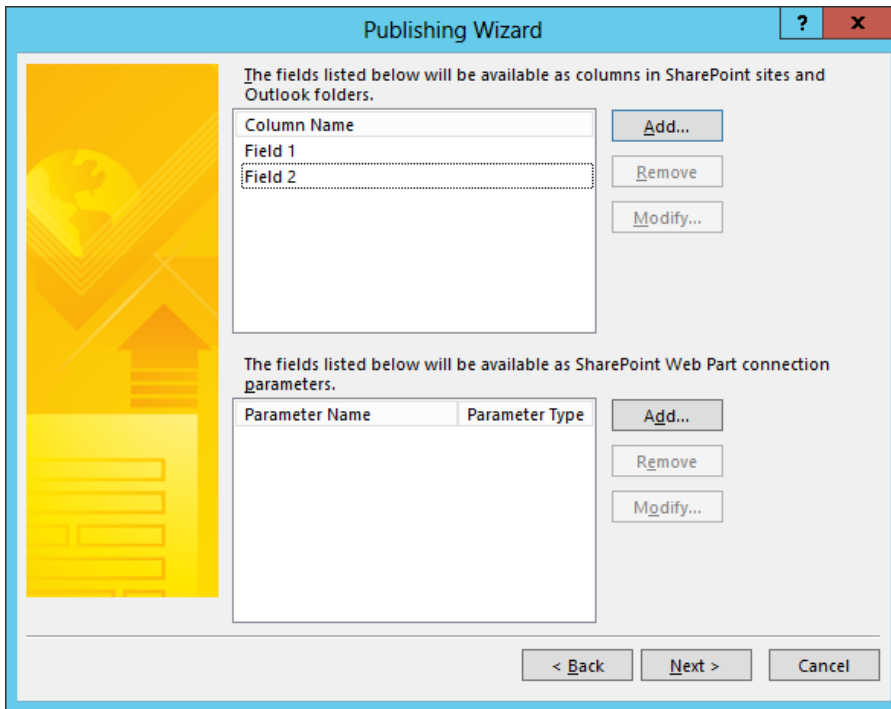
Specify the name for the new Library:



The Publishing Wizard dialog box is shown with the title bar 'Publishing Wizard' and standard window controls. The main area has a yellow decorative graphic on the left. The text 'Type a name and description for this form library.' is followed by two input fields: 'Name:' with the text 'My Form Library' and 'Description:' with the text 'HarePoint'.

At the bottom are three buttons: '< Back', 'Next >' (highlighted), and 'Cancel'.

Add the form fields to available as columns in SharePoint sites:



Publishing Wizard

The fields listed below will be available as columns in SharePoint sites and Outlook folders.

Column Name
Field 1
Field 2

Buttons: Add..., Remove, Modify...

The fields listed below will be available as SharePoint Web Part connection parameters.

Parameter Name	Parameter Type
----------------	----------------

Buttons: Add..., Remove, Modify...

Navigation: < Back, Next >, Cancel

Verify the information summary and click Publish.

Now you can create first document in the new Form Library:

My Form Library ⓘ

[+ new document](#) or drag files here

[All Documents](#) [My Documents](#) ... 🔍

✓	📄	Name	Modified	Modified By	Checked Out To	Field 1	Field 2
There are no files in the view "All Documents".							

Fill the form and click Save:

Form Title

First heading

Type text:

Select a date: × 📅

Specify the name:

Save As

You can only save this file to the current site.

File name:* x

Save in:

The document has been created:

 First  ... A few seconds ago ☐ administrator First document 1/1/2014

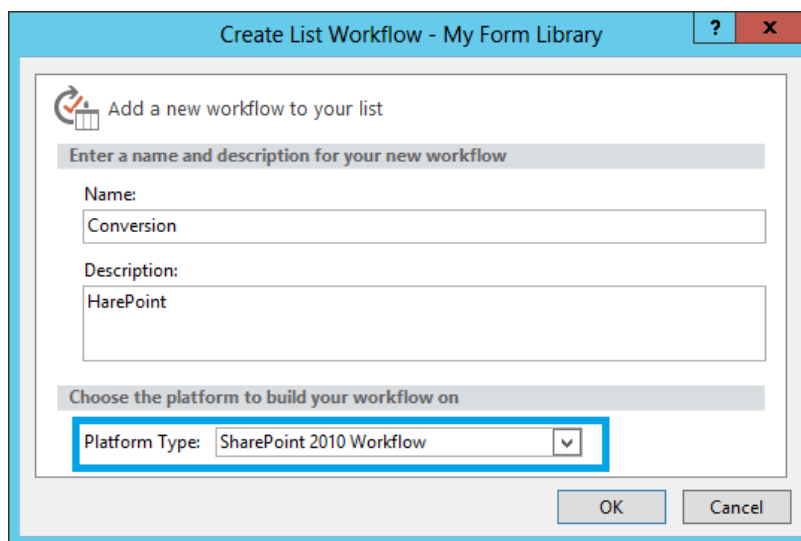
Creating a workflow

Make sure all required installations and setup are made for Document Conversion to work properly (please refer to **InfoPath to PDF Service Installation Guide**)

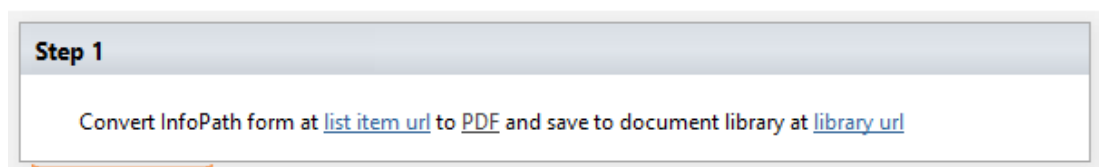
Open SharePoint Designer and connect it to your SharePoint site.

Create a new List Workflow for the Form Library.

Note that **SharePoint 2010 Workflow** Platform Type should be used:




Add action 'Convert InfoPath Form and Save to Document Library' (located in HarePoint Activities – Document Conversion group):



Specify **Current Item: Encoded Absolute URL** as list item url parameter:

Step 1

Convert InfoPath form at  to document library at [library url](#)

Lookup for String

Field Data to Retrieve

Choose the data source to perform the lookup on, then the field to retrieve data from:

Data source: **Current Item**

Field from source: **Encoded Absolute URL**

Return field as: **As String**

Specify the Document Library URL, where converted form should be stored, e.g.

<http://labsp13/Converted%20Documents:>

Step 1

Convert InfoPath form at Current Item:Encoded Absolute URL to PDF and save to document library at <http://labsp13/Converted%20Documents>

Allow this workflow to be manually started in SharePoint Designer:

Start Options

Change the start options for this workflow.

☒ **Allow this workflow to be manually started**

☐ Require Manage List permissions

☐ Start workflow automatically when an item is created

☐ Start workflow automatically when an item is changed

Save and publish the workflow.



Running a workflow

Select filled form in form library and run Conversion workflow that was created in previous paragraph:

SharePoint

Newsfeed SkyDrive Sites

BROWSE **FILES** LIBRARY

New document Upload Document New Folder Edit Document Check Out Check In Discard Check Out View Properties Edit Properties Shared With Delete Document Share Popularity Trends Download a Copy Manage Copies Send To Go To Source

Home Documents Subsites KnowledgeBase HelpDesk

+ new document or drag files here

All Documents My Documents Find a file

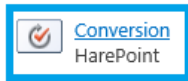
	✓	Name	Modified	Modified By	Checked Out To	Field 1	Field 2
✓	First	...	January 16	administrator		First document	1/1/2014

Workflows

Go to the Workflows page to start a new workflow on the selected document or to view the status of a running or completed workflow.

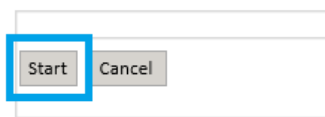
My Form Library: Workflows: First ⓘ

[Start a New Workflow](#)



This workflow has no initiation parameters, so just click Start:

Start "Conversion": First ⓘ



The workflow will start. During this process, InfoPath will be called so it will appear in the background for a few moments.

Checking results

Make sure the workflow is completed successfully:

My Form Library ⓘ

[+ new document](#) or drag files here

[All Documents](#) [My Documents](#) ...

✓	📄	Name	Modified	Modified By	Checked Out To	Field 1	Field 2	Conversion
	📄	First ...	January 16	☐ administrator		First document	1/1/2014	Completed

Access the document library where converted form is saved:

Converted Documents

[+ new document](#) or drag files here

[All Documents](#) ...

✓	📄	Name	Modified	Modified By	test
✓	📄	First 🌿	2 hours ago	☐ System Account	
	📄	RenamedFile ...	January 16	☐ System Account	Completed

You can see PDF file containing the converted form:

Form Title

First heading

Type text:

First document

Select a date

01.01.2014