Perceptive TransForm

Perceptive TransForm Publish Form

Getting Started Guide

Overview

This guide covers the primary steps necessary to publish an existing form created by TransForm Designer in TransForm E-Forms Manager. This is not an in-depth tutorial covering all aspects and steps of publishing forms. For more detailed instructions, refer to the Designer Online Help, E-Forms Manager Online Help or the TransForm Basic & Advanced Training.

Publish an existing form

Some steps assume you have already installed both TransForm E-Forms Manager and TransForm iFiller and have configured them properly to accept newly published forms.

1. Open TransForm E-Forms Manager and log in with your administrative credentials.
2. Click the **Form Catalog** area.
3. Click **New Form**.
4. Click **Choose File** and select a form designed in TransForm Designer, then click **Open**. The form must have a PFF extension.
5. Enter the form password.
6. In **Versions Notes**, type text such as `version 1`.
7. Click **Upload**.
8. In the **Form Title** field, type a name for the form, such as `Test Form`.
9. In the **Form Category** field, select a category. If none exists, cancel the process and create an initial category from the **Administration** area.
10. In the **Description** field, type text such as `Test Form`.
11. Scroll to bottom and click **Save Changes**.
12. Under the **General** tab, complete the following steps.
    1. In the **Version** field, type `1`.
    2. In the **Publish On** field, select or type today's date.
    3. Under **Form Processing**, select all check boxes.
    4. Under **iFiller**, select all check boxes.
    5. Click **Save Changes**.
13. Under the **Submission** tab, complete the following steps.
    1. In the **Provide Notification of Successful Submission** area, select the **Notify with Popup Dialog** check box.
    2. Click **Save Changes**.

14. In the **Form Publishing Information** area, click **Approve**.
15. Click **Yes** and then click **OK**.
16. In the **Form Publishing Information** area, click **Publish**.
17. Click **Yes** and then click **OK**.
18. In the upper right corner of E-Forms Manager, click **PUBLISHED E-FORMS**.
19. Click the **Category** where you published the form.
20. Find the form in the list and click the icon under the **View Heading**.

    Your form appears in your default browser and can be filled out and submitted.

The form is ready for end-user access, completion, and submission. To create workflow actions and steps, refer to the *Perceptive TransForm Workflow Email Notification Getting Started Guide*.