Perceptive TransForm
Workflow Email Notification
Getting Started Guide

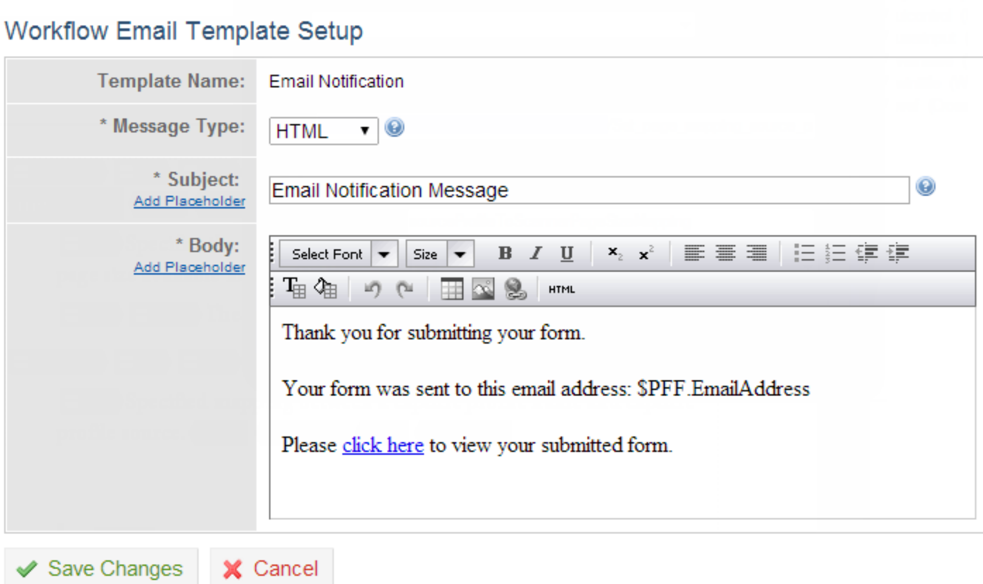
Overview

This guide covers the primary steps necessary to create an Email Notification Workflow Action/Step for 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 creating a workflow action. For more detailed instructions, refer to the E-Forms Manager Online Help or the TransForm Basic & Advanced Training.

Create an Email Notification Workflow Action/Step

Some steps below assume you have already installed both TransForm E-Forms Manager and TransForm iFiller, and have configured them properly to send email messages from TransForm E-Forms Manager.

1. Open TransForm E-Forms Manager and log in with your administrative credentials.
2. Select the **Form Catalog** area.
3. Find an existing form in the list and click its line. You may also search for the form by first clicking **Search**.
4. To edit the most recent form version, click the **Edit Version x.x** link.
5. Click the **Workflow** link.
6. To first create the email template, click the **Email Templates** tab.
7. Click **New Email Template**.
8. In the **Template Name** field, type the name, such as `Email Notification`.
9. In the **Message Type** field, type the appropriate value. By default this is set to HTML.
10. In the **Submit** field, type a value, such as `Email Notification Message`.
11. In the **Body** area type, or select the appropriate email body message. Refer to the following sample screen shot.



12. To place a form field value into the email body, complete the following substeps.
    1. Under the **Body** field label, click the **Add Placeholder** item.
    2. Scroll down to **Form Fields** and select the form field you want placed in the email body. When the form is submitted, the value in that form at that time will be placed in the email template.
    3. Click **Add Placeholder**.
    4. Typically, the field token name is placed near the end of your current email body text. You may need to select the name, and cut and paste it in the appropriate place in the email template. You can also manually type the field token name (case sensitive) in the appropriate area.
13. To place a link to the submitted form in the email body, complete the following substeps.
    1. In the email body area, type text such as `Please click here to view your submitted form`.
    2. Click and highlight the **click here** text, or the appropriate words or sentence that will become your hyperlink to the submitted form, and click the **Create Link** icon. (The icon image resembles a globe with a chain.)
    3. In the popup window, manually type the following value in the **URL** field (case sensitive).

       $SUBMITTED_FORM_IFILLER_URL
    4. Optionally, you may follow the previous steps to **Add Placeholder** and select this form field token from the list under **Submission Related Data**.
    5. Click **Submit** to save your entry. You may need to resize the popup window to see all available button choices.
14. Click **Save Changes**.
15. Click the **Submission Rules** tab.
16. Click **New Rule** and complete the following substeps.
    1. In **Rule Name**, type **Process Form**, or similar text.
    2. Ensure the **Rule Order** value is the default. Do not select **Conditional**.
    3. Click **Finish**.
17. Click the rule you just created under **Rule Name**.
18. Under the **Workflow Rule Details** window, click **New Action**.
19. Under **step 1**, complete the following substeps.
    1. Type a value for **Action Name**, such as `Send Email Notification`.
    2. In the **Action Type** list, click **Send Email**.
    3. Ensure **Action Order** is the default value.
    4. Click **Enable Logging**.
    5. Click **Next**.
20. Under **step 2**, complete the followingsub steps.
    1. Click **Log the following message for form administrators**.

2. You can change the message that appears immediately under or leave as is.
3. Click **Log the following message for end users**.
4. You can change the message that appears immediately under or leave as is.
5. Click **Next**.

21. Under **step 3**, complete the following substeps.
    1. If you have an email address field on your form and you want to use the value in that field when the form is submitted to send an email to, complete the following.
        - In **Form Field** select the email address form field name you want to use and then click the **To->**, **Cc->**, or **Bcc->** button.
    2. If you want to *hardcode* and always send this email to a specific email address, complete the following substep.
        - In the **Specific Address(es)**/**Distribution List(s)** field type the specific email address you want to use and then click the **To->**, **Cc->**, or **Bcc->** button.
    3. Click **Next**.
22. Under **step 4,** select the Email Template you created in a previous step. If you created more than one, you can click the **View Template** link to display the Email Template and ensure you have selected the correct one.
23. Click **Next**.
24. Select the **Submitted Form** check box in this last step if you want to attach a copy of the submitted form (in .PFF format) to the actual email message created.

    Note Users that have installed TransForm Filler, can then access this attachment from the email message to access the form.
25. Click **Finish** and click **OK**.
26. Click **Enable Workflow** and click **Save Changes**. The email notification workflow step is now enabled.
27. From the **Published E-Forms Catalog**, select your form and open within your default browser using iFiller.
28. Fill out your form and submit.
29. To verify, access the email account you used in the previous step and ensure that you received the email message. Refer to the following sample email.