Rendering a Guide in LiveCycle ES2

A Form Guide is a way of collecting information that is intended for a structured format (a form) but using an unstructured format (a flex application) to gather the information thereby guiding the user through the data collection process.

This paper does not discuss how to build the Guide but focuses on how to render the Guide once it is designed. Note that these techniques are specific to Guides in ES2 and will not function with earlier versions of LiveCycle.

There are two ways to render the Guide – through Workspace (an end user application for Process Management) and in a standalone browser. In both cases a renderer is required. A renderer is a program that will generate/build the guide from all the component pieces.

Rendering a Guide for Workspace

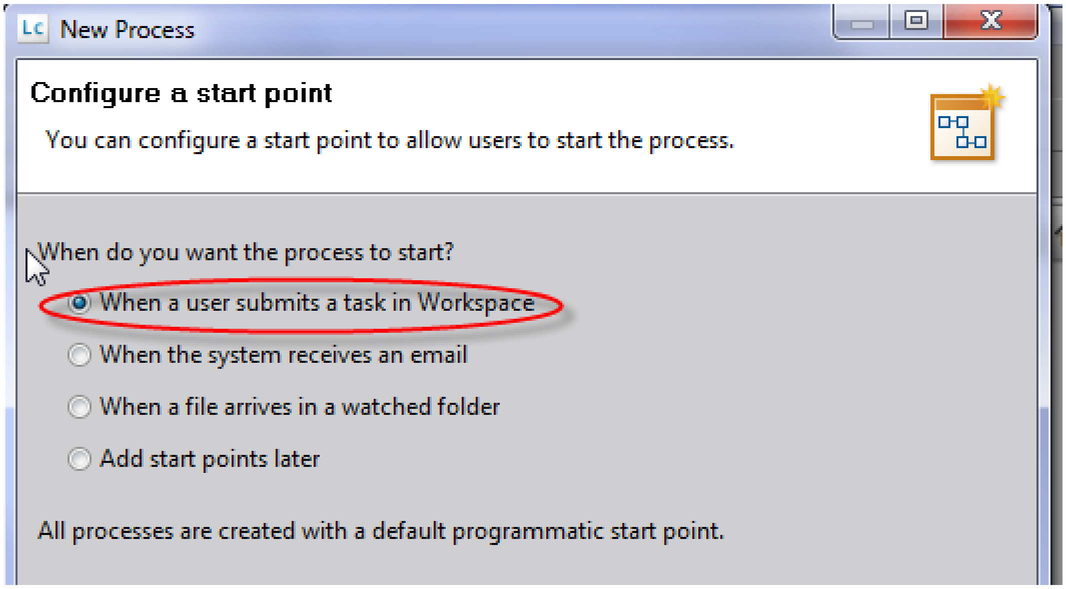
Rendering the Guide for workspace is relatively easy and is similar to rendering other form formats for Workspace. Note that I recommend that your Guide uses the Workspace layout defined in the Guide properties. This layout was built specifically for this application. These instructions assume that the Guide is completed and operational.

Assumptions

1. The Guide that is being used is completed and operational. For this exercise I will refer to it as MyGuide in an application folder called MyApplication in a subfolder called Guides.
2. The main process is called “Mainline”

Steps to complete

1. In the **MyApplication,** create a new folder called **Processes**.
2. In the **Processes** folder create a new process called **MainLine**.
3. A wizard will start, in the **“Configure a start point”** screen, select **“When the user submits a task in workspace”**. Click **Next**.



Configure a start point

You can configure a start point to allow users to start the process.

When do you want the process to start?

● When a user submits a task in Workspace

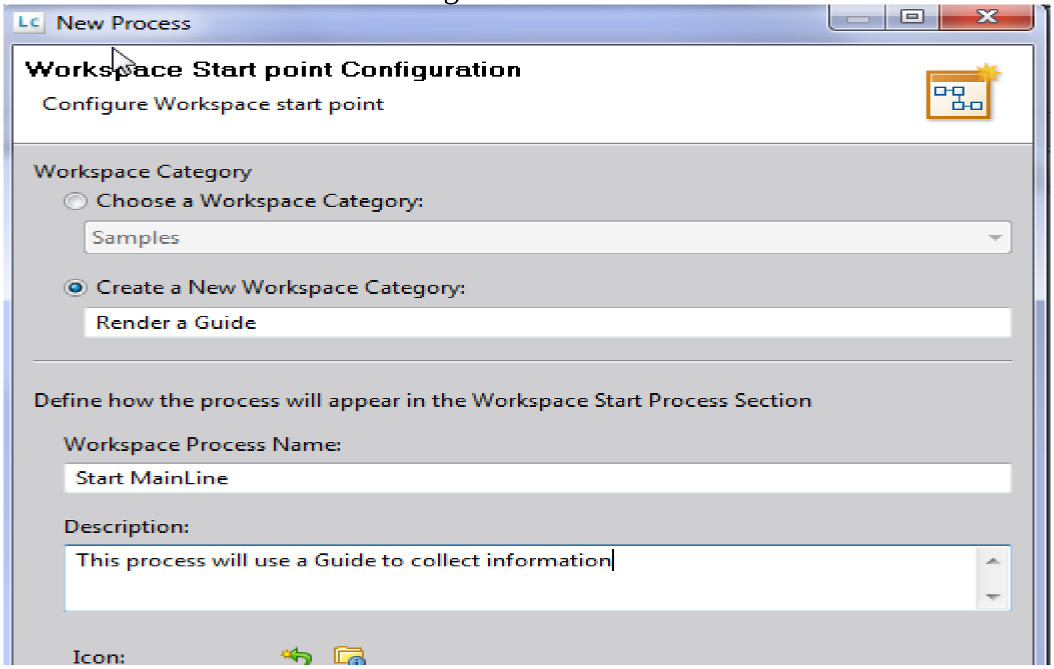
○ When the system receives an email

○ When a file arrives in a watched folder

○ Add start points later

All processes are created with a default programmatic start point.

4. In the Form Selection screen choose the **“Use an existing Form”** option.
5. Navigate the where **MyGuide** is located and select it. The path will appear in the **“Enter or select an asset”** dialog. Click **Next**.
6. In the **Workspace Category** area, click **“Create a new Workspace category”**.
7. Enter a name for the Category. This name allows you to determine the category the user will navigate through to start this process in workspace.
8. Enter a meaningful description. This information will appear on the task card when the user enters the category we just defined.
9. Your screen should look something like this:



Workspace Start point Configuration

Configure Workspace start point

Workspace Category

○ Choose a Workspace Category:

Samples

● Create a New Workspace Category:

Render a Guide

Define how the process will appear in the Workspace Start Process Section

Workspace Process Name:

Start MainLine

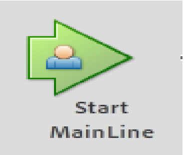
Description:

This process will use a Guide to collect information

Icon:

10. Hit the **Finish** button.

11. To access these settings (for review or if you want to change them later), click on the **Start Mainline** icon. The Process Properties view will display all of the options that you have selected.



12. Save and deploy your process
13. You are ready to test with Workspace. Open a browser and navigate to the address: http://servername:portnumber/workspace
14. Login with administrator credentials.
15. Click on the **Start Process** icon.
16. Choose the category you created in step 7.
17. Click on the **Start Mainline** icon.
18. Your Guide will appear inside of the workspace application.

What's Next

You can modify your mainline process to route the information that the Guide produces through other user steps. Note that during the process creation a variable of type XML was created for you (formData). This variable will hold the inbound data that the Guide will produce and can be used as input to other user steps.

Rendering a Guide in a Browser

There are two processes that need to be created for the guide to be rendered correctly. The first is a process that will receive the inbound data stream and the second is a process that will render the Guide for us.

Assumptions

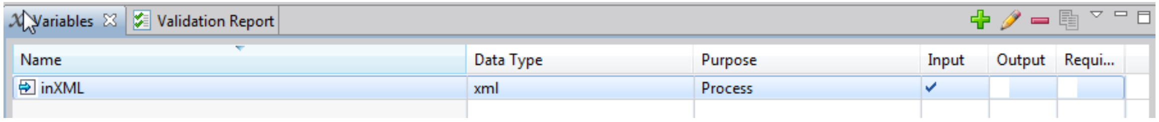
The Guide that is being used is completed and operational. For this exercise I will refer to it as MyGuide in an application folder called MyApplication in a subfolder called Guides.

Creating a process for receiving information:

This functionality does not need to be done in LiveCycle but as this is a LiveCycle tutorial we will use LiveCycle.

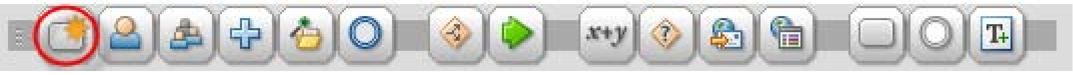
1. We need to create a new process that will receive the information submitted by the Guide. Create a new application called **MyGuideRendering.**
2. Create a subfolder under the application called **Processes**.

3. Create a new process in the process folder called **RecieveData**. Accept all of the default settings during the setup. The process will be in edit mode at this point.
4. Create a new input variable named **inXML** of type **XML**. This variable will be used to hold our inbound data.



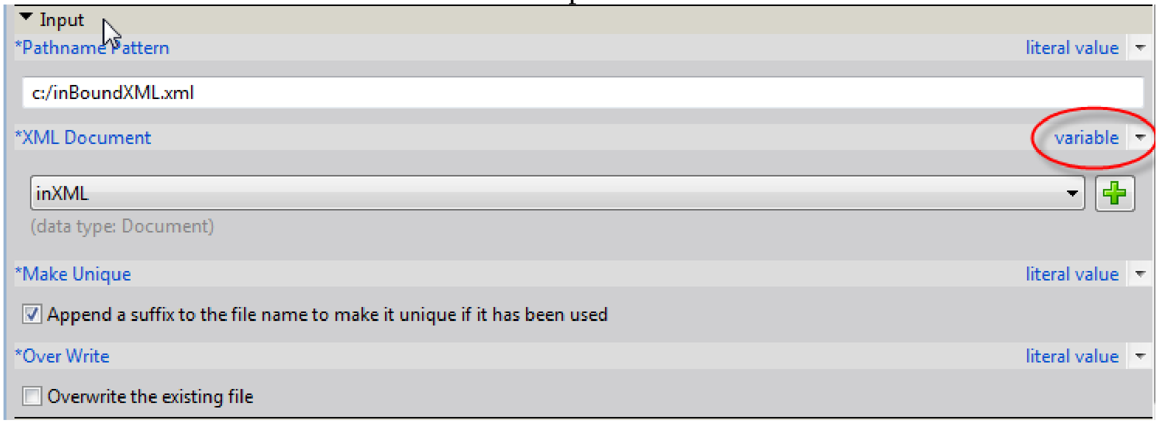
Name	Data Type	Purpose	Input	Output	Requi...
inXML	xml	Process	✓		

5. In the toolbar at the top of the drawing palette drag the **Activity Picker** on to the canvas.



A dialog pops up allowing you to pick the activity you want.

6. Navigate to the **Foundation** folder and select the **Write XML** under the **File Utilities** section. This service will write the variable to the file system.
7. Click on the new service and fill out the Properties as follows:



Input

*Pathname Pattern — literal value

c:/inBoundXML.xml

*XML Document — variable

inXML

(data type: Document)

*Make Unique — literal value

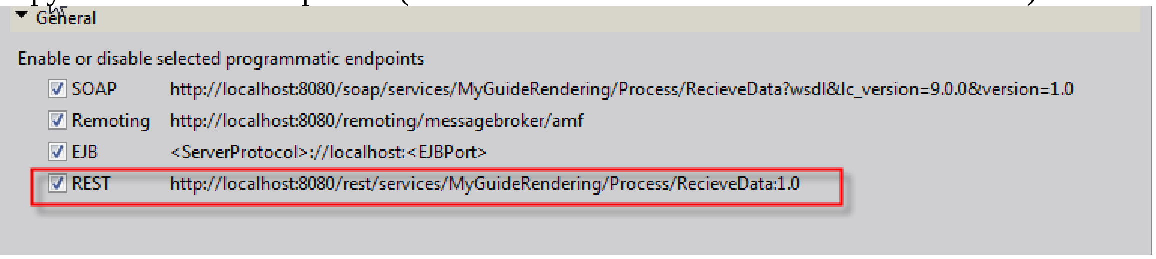
☑ Append a suffix to the file name to make it unique if it has been used

*Over Write — literal value

☐ Overwrite the existing file

Note that the **XML Document** field will need to change from **literal** value to **variable**. This can be done by clicking on the drop down indicated on the image above. Once completed, you will be able to choose **inXML** from the dropdown list of variables.

8. Save your process.
9. Click on the **Start point** icon on your process. In the properties page a list of start points and their associated URLs will be displayed.
10. Double click on the URL associated with the REST endpoint. Once highlighted copy the URL to the clipboard (we will need this url later for the Render service).



General

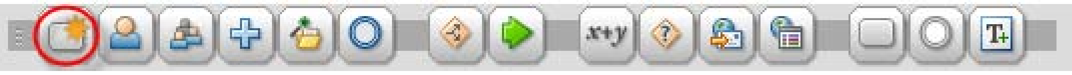
Enable or disable selected programmatic endpoints

☑ SOAP	http://localhost:8080/soap/services/MyGuideRendering/Process/RecieveData?wsdl&lc_version=9.0.0&version=1.0
☑ Remoting	http://localhost:8080/remoting/messagebroker/amf
☑ EJB	<ServerProtocol>://localhost:<EJBPort>
☑ REST	http://localhost:8080/rest/services/MyGuideRendering/Process/RecieveData:1.0

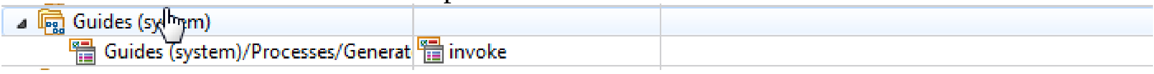
Creating a process for rendering the Guide:

As mentioned earlier – a Guide needs a renderer to be able to build the HTML wrapper for display. A default render is provided for you. It is located in the Guides(system) application folder.

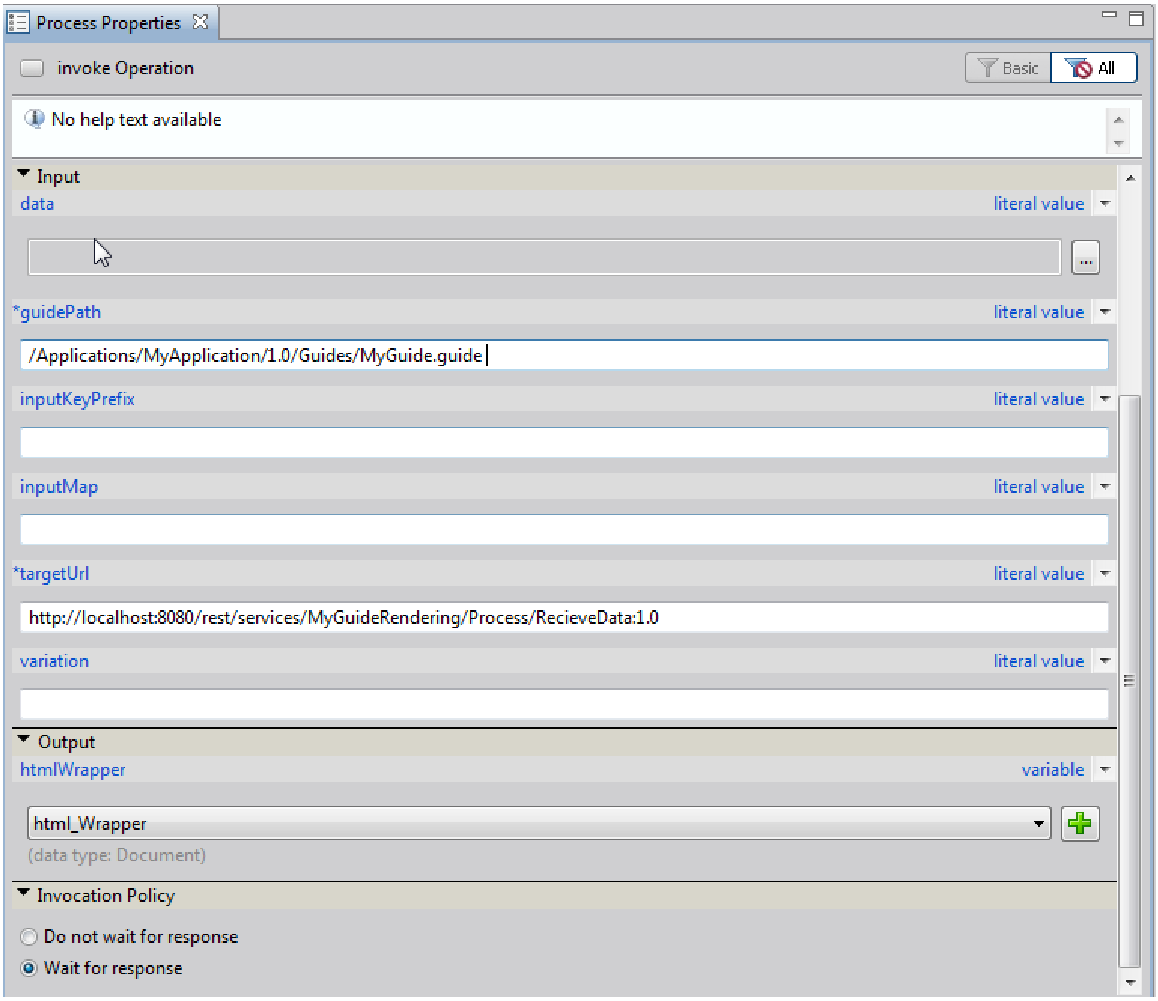
1. In WorkBench, under the **File** menu, select **Get Applications**. A list of applications that are on the server is displayed. Select the **Guides(system)** application. This application contains the default renderer we will use. The renderer has been configured to only be callable by SOAP or EJB call.
2. Create a new process under the **Process** folder called **RenderMyGuide**. Accept all of the defaults during setup of the process or click **Finish**.
3. In the toolbar at the top of the drawing palette drag the Activity Picker.

   A dialog pops up allowing you to pick the activity you want.
4. Navigate down to the **Guides(system)** folder and choose the **Process/GenerateGuide** Invoke operation that we retrieved earlier.

5. Click on the new icon that was created. Notice the Process Properties now displays information about this task. We are calling this renderer as a sub-process and must pass in certain information for the renderer to do its job.
6. In the **Input** section there are two mandatory fields that we must pass. The guide (including location) that we want to display and the targetURL so that the guide knows where to submit its data to. In the **guidePath** field enter the location of your guide file - **/Applications/MyApplication/1.0/Guides/MyGuide.guide** note that the full path (including the Applications folder, version and the extension .guide) is required.
7. In the **targetURL** we need to put the REST endpoint for the process that will receive the data (we put it in the clipboard in the previous section). Paste the URL for the RecieveData process into this field.
8. In the **Output** section we need a variable to hold the resulting HTML wrapper that is produced. In the **htmlWrapper** field click on the green plus button to create a new output variable and name the variable **html_Wrapper**. Your Properties Page should look like this:



invoke Operation

No help text available

Input

data — literal value

*guidePath — literal value

/Applications/MyApplication/1.0/Guides/MyGuide.guide

inputKeyPrefix — literal value

inputMap — literal value

*targetUrl — literal value

http://localhost:8080/rest/services/MyGuideRendering/Process/RecieveData:1.0

variation — literal value

Output

htmlWrapper — variable

html_Wrapper

(data type: Document)

Invocation Policy

○ Do not wait for response

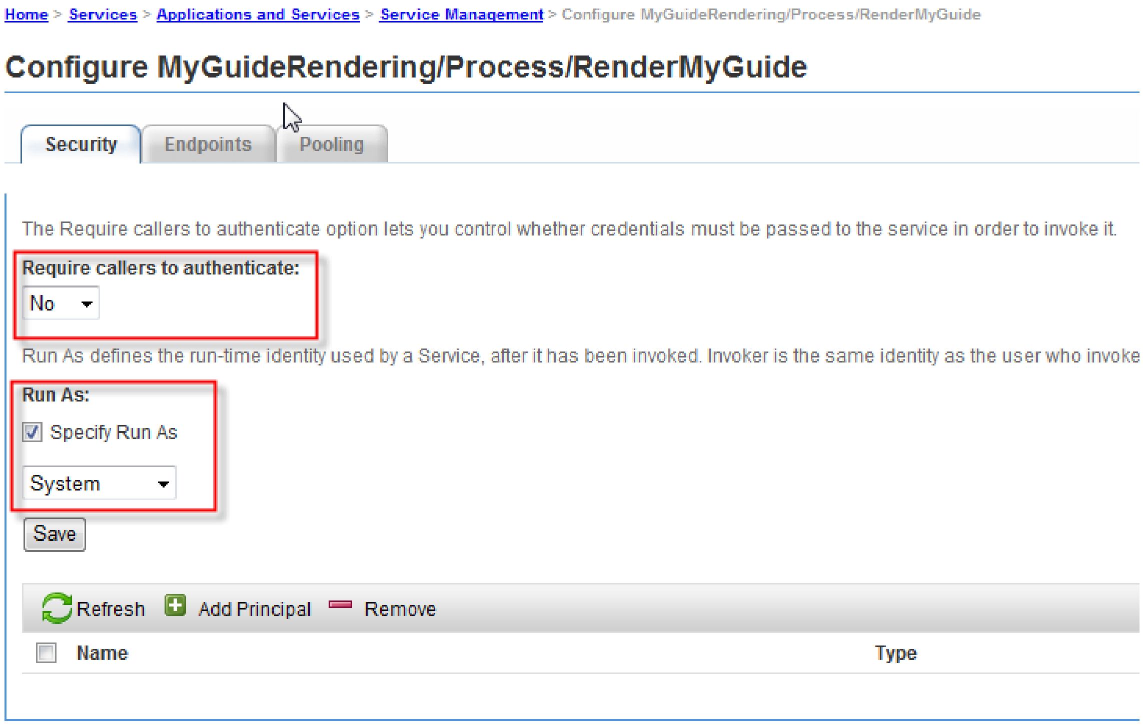
● Wait for response

9. Save the process file.
10. Deploy the application. Both processes will be checked in and deployed.
11. In the **RenderMyGuide** process, click on the **Default startpoint** and select the REST endpoint for this process. Copy it to the clipboard.
12. Start a new browser session. Paste the REST endpoint stored in the clipboard to the URL navigation field in the browser. Hit enter.
13. A dialog asking for credentials will pop up. Enter valid administrator credentials for your system. We will disable this security later.
14. Your guide will appear in the browser. Complete the guide and hit submit.
15. This will call the initial process that we created and will write the submitted XML to the file system. Validate that a file with your data was created (in the path specified in your process).

Disabling Security

1. To disable the need to enter credentials when the file is loaded launch the adminui application (http://servername:port#/adminui)
2. Login with administrative credentials.
3. Navigate to **Services/Applications and Services/Service Management**.

4. In the **Category** dropdown, select the **MyGuideRendering** application. Your two processes will appear.
5. Click on the **RenderMyGuide** option. A new screen will appear with details about the RenderMyGuide process.
6. Click on the **Security** tab.
7. In the **Require callers to authenticate** dropdown, set it to **No**.
8. In the **RunAs** section select **System** in the **Specify RunAs** dropdown. This will allow all calls made by this process to run in a System context.



Home > Services > Applications and Services > Service Management > Configure MyGuideRendering/Process/RenderMyGuide

Configure MyGuideRendering/Process/RenderMyGuide

The Require callers to authenticate option lets you control whether credentials must be passed to the service in order to invoke it.

Require callers to authenticate: No

Run As defines the run-time identity used by a Service, after it has been invoked. Invoker is the same identity as the user who invoke

Run As:

☑ Specify Run As

System

□	Name	Type

9. Hit the **Save** button.
10. Test with a fresh browser (credentials are cached). You should not get prompted for credentials this time.

What's next

You may choose to augment your RecieveData process so that it will return an HTML response indicating that the server has received the transmission, but that is beyond the scope of this exercise.