Forms

Each incoming form is stored in DocuShare as a standard document object or as a custom document object class. Each form is represented by a PDF primary rendition and an accompanying XML rendition.

Document type

The DocuShare Content Intake Configuration UI page contains a eld titled Document Type. This eld allows you to customize how you want your forms represented in DocuShare. This eld can help you organize the forms on a site and create specialized documents that contain only those properties necessary and related to a specic form.

By default, DocuShare assigns the standard document object class to all incoming forms within a socket instance, thereby giving all incoming PDF files the handle Document-## and supplying all PDF les with the standard DocuShare document object class properties.

If you want to organize and differentiate your form documents, and have documents contain only those properties specific to that form, you can congure DocuShare to assign a custom document object class to the forms, such as LoanApplication-##. To do so, you must rst create a custom document object, then enter the Name of that custom object class in the Document Type eld of the Content Intake Conguration UI page.

Note: The Name of an object class is the system name, such as loan_application. The Label of an object class is the name as it appears on the UI property page, such as Loan Application.

Refer to the DocuShare Administrator Guide for instructions on creating custom object classes. When creating a custom object class for eForms, always select to clone from the Document class. When designing a form, check to make sure the object class you intend to use for the form does not already exist on the DocuShare site. For example; if you intend to create a new object class called Invoice, there may already be an object class named Invoice on the DocuShare site. That existing object class no doubt has property fields different than those you will use with your Invoice form, and the object is currently in use for purposes other than eForms.

Property mapping

When designing a form, a form designer can creates elds that map to standard and custom properties of the document object class and custom document object classes. For example, an Invoice custom document object class might have an "invoice account" custom property. With the "invoice account" properly mapped to the correct form eld, the value entered on the form is automatically assigned to the corresponding property in the DocuShare document.

The form designer should work closely with the DocuShare administrator to make sure the form meets the requirements for use with DocuShare.

The correct syntax for creating a form eld that maps correctly to a DocuShare property is DS_propertyname. For example, DS_loantitle or DS_application_date. The property name must follow DocuShare property name guidelines as described in the DocuShare