Configuring

Modifying a workflow to use electronic forms with PDF jobs

You can add a step based on the **CombinePDFWithForm** step template to a workflow to combine an electronic form with data for PDF jobs.

Before you add the step to the workflow, review the preprinted forms used to print jobs that the workflow processes. Add electronic forms to the media objects for the preprinted forms that you want to print on plain paper. You do not have to define electronic forms for all the preprinted forms used by the workflow. You can define electronic forms only for the preprinted forms that you want to replace.
To modify a workflow to use electronic forms with PDF jobs:

1. Click the **Workflow** tab.

2. Click the name of the workflow you want to modify.

3. **Optional:** Disable the workflow by clicking the switch to the left of the workflow name.
   If you do not disable the workflow while you edit it, jobs that use this workflow continue to move through steps. When you save, the workflow is momentarily disabled then enabled again. Jobs that are processing in the workflow could move into error.

4. Review the steps in the workflow and decide where you want to add the **CombinePDFWithForm** step.

   To modify a simple workflow that processes PDF jobs, you could put a **CombinePDFWithForm** step after the **OptimizePDF** step and before the **CountPages** step.
   To modify a workflow that processes PDF jobs that contain documents, you could put a **CombinePDFWithForm** step after the **BuildPDFFromDocuments** step.

5. Add the **CombinePDFWithForm** step to the workflow in the appropriate place.

6. Unless you have special processing requirements, use the default values for the **Combined PDF file** and **JDF output file** properties of the step.
   If you specify other values, the combined PDF file does not become the current print file used by subsequent steps. Similarly, the JDF file produced by the step does not become the JDF file used for subsequent steps.

7. If you plan to use a printer that does not support Sides page exceptions in JDF job tickets, set the Simple sheet processing property to Insert blank back pages. If your printer can process Sides page exceptions, select Add Sides page exceptions to JDF, which will prevent any usage charges your printer vendor might charge for blank back sides on duplex jobs.

8. **Optional:** Add a branch that bypasses the **CombinePDFWithForm** step to process jobs that are not ready to use electronic forms. Jobs print on preprinted forms when they go through that branch. When you add the branch, the same workflow can process the jobs that are ready to use electronic forms and the jobs that are not ready.

   To send the jobs to different branches based on whether they use electronic forms, set a rule on one of the branches. For example, if you want jobs with a **Customer name** of `Acme` or `Pinnacle` to use electronic forms, you could set this rule on the branch with the **CombinePDFWithForm** step:

       Job.CustomerName = 'Acme' OR Job.CustomerName = 'Pinnacle'

   Jobs with a **Customer name** of `Bank10` or `Standard` bypass the **CombinePDFWithForm** step and continue to print on preprinted forms.

9. Save and enable the workflow.

10. Test the workflow to make sure that it works properly.
    Check the jobs that the **CombinePDFWithForm** step processes to make sure that they print on the media specified by the **Media name for printing** property of the media object.

When a media object includes a form for the back of the media, the **CombinePDFWithForm** step changes simplex jobs that require the media to duplex. For example, a simplex job has four pages. The **PLE Media** property specifies **Form12** for page 3. The **Form12** media object specifies an electronic form for the back of the media.

When the step processes the job:

▸ It converts the job to duplex.
▸ It adds three blank pages, one each after pages 1, 2, and 4.
▸ It adds a page with the data for Form12 after page 3.

When a media object includes a form for the back of the media and the JDF job ticket associated with the job specifies simplex for the job but includes page exceptions for some duplex pages, the **CombinePDFWithForm** step changes simplex jobs that require the media to duplex. For example, a simplex job has four pages. The **PLE Media** property specifies Form99 for pages 2 and 3. The Form99 media object specifies an electronic form for the back of the media.

When the step processes the job:

If the Simplex sheet processing property is set to Insert blank back pages, the step:

1. Converts the job to duplex.
2. Adds one blank page after page 1.
3. Adds a page with the data for Form99 on the backs of pages 2 and 3.
   The back of page 3 has the data from page 4 and the data for Form99.

If the Simplex sheet processing property is set to Add Sides page exceptions to JDF, the step:

1. Does not change the Duplex property for the job from Simplex.
2. Adds a new duplex side page exception for page 2 in the JDF.
3. Adds a page with the data for Form99 on the backs of pages 2 and 3.

Parent topic: [Setting up to use electronic forms](#)