Workflow Step - Advanced Document Generation

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Introduction

Combine a customized template with Workflow's Document step to create and distribute dynamic PDFs incorporating form response data. This article covers the basics of tagging your document template and the steps to configure the Document step in your workflow.

Requirements

To use Advanced Document Generation, a FormAssembly user must

- be part of a Team plan or higher
- have Content Management user permissions enabled for their login
    - specifically, Advanced Document Generation must be enabled for the user account

File Upload Restrictions

- Files must be of type .DOC, .DOCX, .PPT, or .PPTX
- Upload size limit is 30MB

Demo

Add a Document Step to a Workflow

Note: Advanced Documentation Generation is in Beta

- Select **Add Step**
- Select **Document**

Upload a Tagged File

A tagged file created outside of FormAssembly, uploaded to the Document step, is used as a template for the PDF generated by the Document step. See the File Tagging section of this article for more information about how to format tags within your file.

File Upload Restrictions

- Files must be of type .DOC, .DOCX, .PPT, or .PPTX
- Upload size limit is 30MB

Supported Scripts and Languages

- **Latin**: Western, Central, and Eastern European languages, as well as Turkish, Vietnamese, and other languages that use the Latin script with diacritics, such as Polynesian languages.
- **Cyrillic:** Russian, Ukrainian, Bulgarian, and Serbian.
- **Greek**
- **Arabic:** Arabic and other related languages that use the Arabic script.
- **Devanagari:** Hindi, Marathi, Nepali, Sanskrit, and other related languages that use the Devanagari script.
- **Chinese:** Simplified and Traditional
- **Korean:** Hangul
- **Thai**
- **Japanese:** Hiragana and Katakana

Supported Fonts

• Arimo • ArivoBlack • Caladea • Carlito • Cousine • LiberationSerif • Mplus1p	• OpenSans • OpenSymbol • Roboto • RobotoMono • Tinos • NasalizationRG • Symbols/Dingbats	• NotoSansArabic • NotoSansDevanagari • NotoSansKR • NotoSansSC • NotoSansTC • NotoSansThai

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File Tagging

Tags map positions on your document template where you intend to fill data as configured in the Document step.

Tags

Tags are made with a `{{` start tag, tag name, and `}}` closing tag.

In its most basic form, a tag could look like the following example:

```
{{tag_name}}
```

Use tags to designate places on your document template where form field values (or other values and variables configured in the Document Step) should go.

Loops

```
{{loop loop_name}} ...
{{endloop}}
```

Use loops to tag repeatable sections on your document template and later map them to repeatable sections in your form responses.

Loops can be nested and combined with IF statements.

> **Note**: Signature and signer tags are **not supported** within loop tags. For more information about including E-Signatures in Document steps, refer to our E-Signature article.

IF Statements

```
{{if condition_name}} ...
{{endif}}
```

The value mapped to the condition ("condition_name" above) is converted to a boolean.

When using an IF statement, the templated area between the beginning and end of the IF statement is only applied when the condition is TRUE.

It is evaluated as FALSE when either:

- The value is false, "", 0, or null
- The value is not configured in the Document Step, where the template is uploaded

IF statements can also have an `{{else}}` clause.

```
{{if cond}} ... {{else}} ...
{{endif}}
```

An else clause would apply only when the initial IF statement condition is FALSE.

Upload File Tag Behaviors in Document Step Configuration

- **Tags (not wrapped in a loop)**
  - Results in a Document section, within the Configuration tab, with **one mapping row per tag**.
- **Tags in a Loop**
  - Results in **Repeatable Content Mapping** in a new section below the Document section with the default name of the loop's variable name ("loop_name" above).
- **IF Statement**
  - Results in **Conditional Content** in the Document section, where **Conditional Rules** can be applied.

Formatting Recommendations for E-Signature Tags

- Avoid placing text to the right of signature/signer tags.
  - The signature/signer tag's content can overlap with text to its right, making the document hard to read.
- Set line spacing to at least 2.0 on lines containing signature tags.
  - The signature may overlap with the text above or below, without sufficient space around the tag.

Document Step Mapping

Each tag created from the template will result in data on the document that can be mapped to **fields**, **formulas**, **values**, or **variables**.

- **Field**: Use the list to search for and select a form field from the forms included in the workflow
  - If a **Choice Field** is selected, the respective choice fields appear under the field mapping
  - If a **Repeatable Field** is selected, a repeatable content section should be added within that mapping section, with "workflow" selected by default

> **Note**: Selecting **workflow** means there will be one event created, and repeating content will be merged and comma-separated in the same event

- **Value or Formula**: Enter a value as text or open the formula editor to build a formula.
- **Variable**: Select an existing workflow variable from the dropdown

Conditional Content

When an uploaded document template has an IF statement, conditional content becomes available within the

associated section where a condition can be applied to each IF statement.

Conditional logic dropdown options include

- "**All conditions must be satisfied**"
- "**Any condition can be satisfied**"
- "**Custom**"
    - When Custom is chosen, the user can input custom logic text with **AND** or **OR** statements

Loops

When an uploaded document template has a loop tag, an additional section on the Configure tab becomes available for each loop within the template file.

- One section should exist per loop
- Section title defaults to "[loop_name] Section"
- The section contains a mapping for all tags in the loop

Dependencies

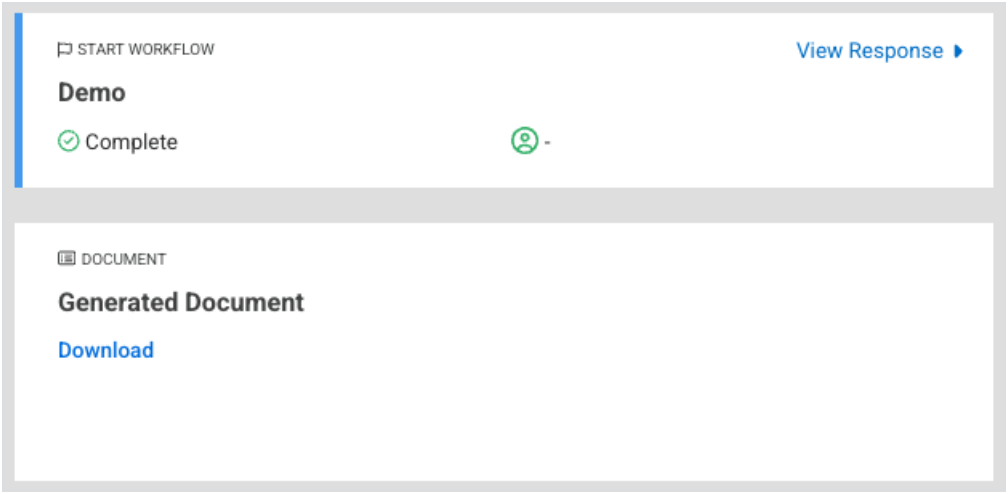
A dependency can be added to each section. A section dependent on another section will only run after the section designated as its dependency runs.

- Adding a dependency adds a blank "**Run after**" dropdown menu
    - The dropdown options are all sections available within the Configure tab

> **Note**: When adding a dependency to a dependent action, a dependent action cannot use the action it is a dependency for as a dependent action.

Workflow Response Document

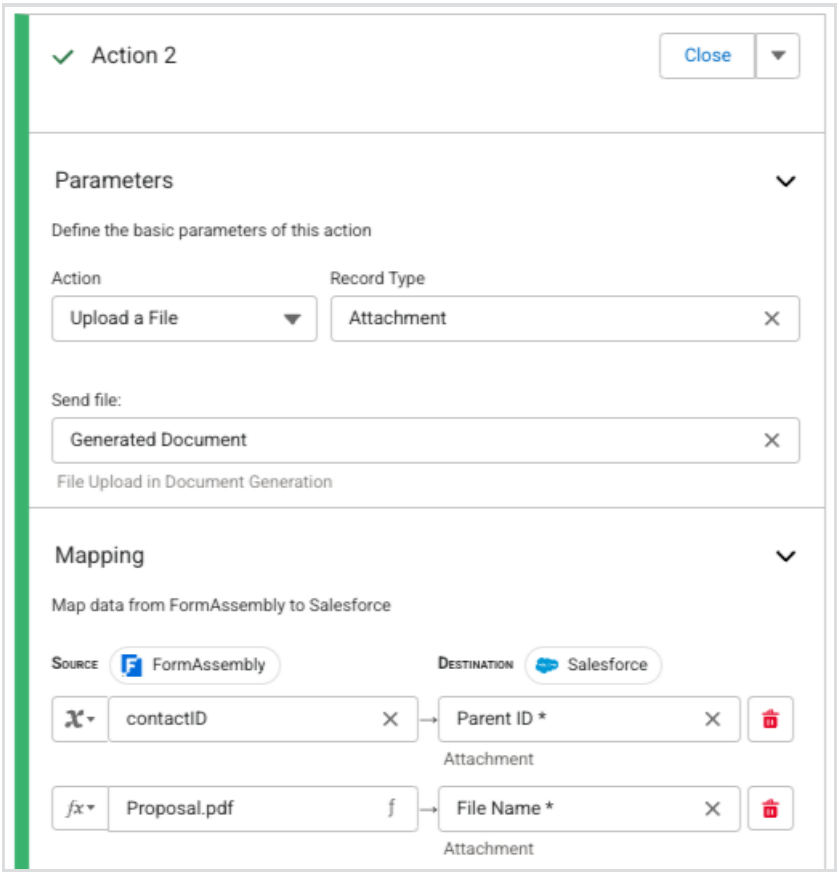
When the Document step of a workflow runs, a Document card is created in the workflow response. Access the generated PDF file by selecting the Download link.



Send the PDF File

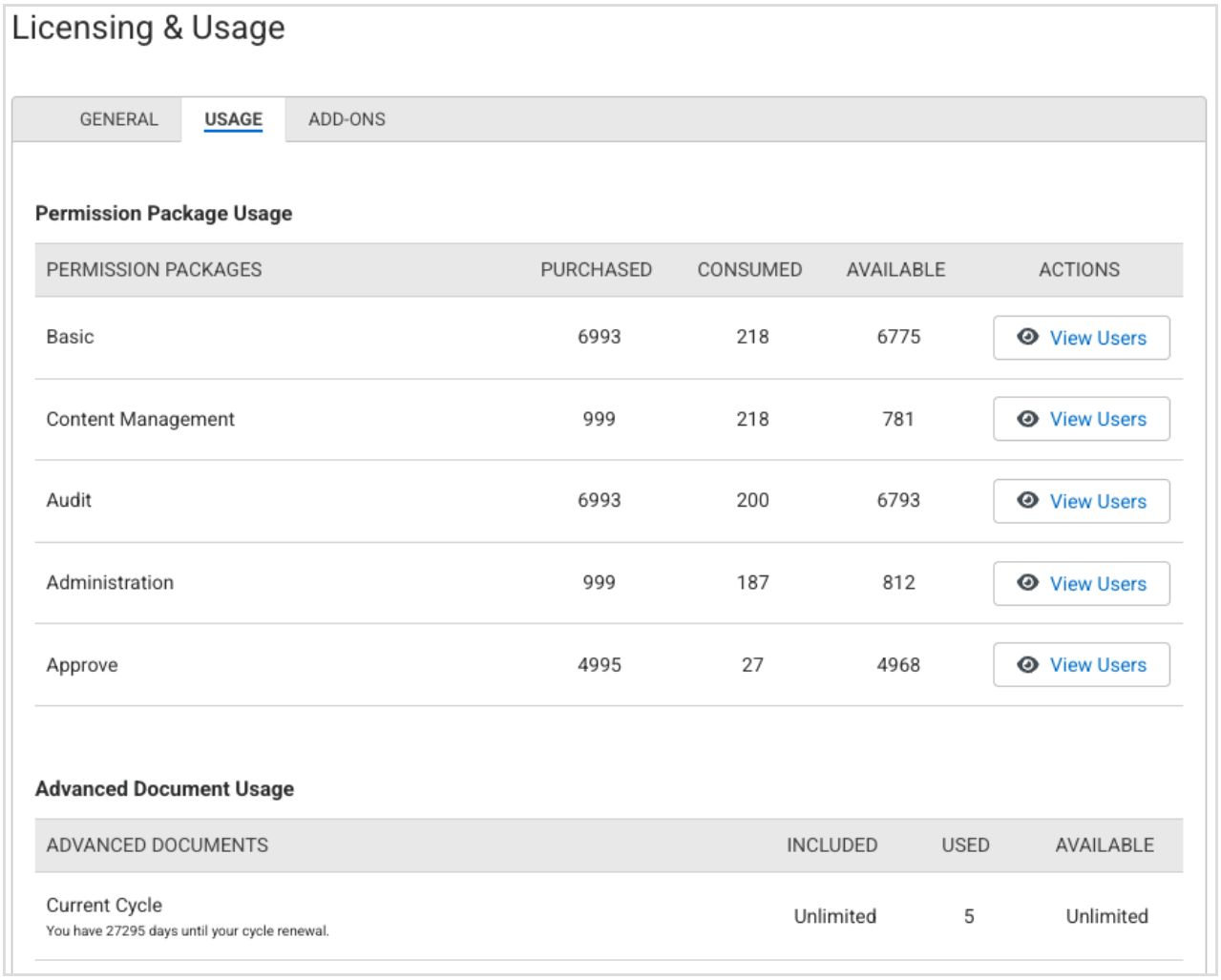
The PDF document generated by a Document step can be sent through connectors and the Email step.

The PDF document name can be chosen in the "**Send file**" dropdown of a file upload connector's step, such as the Google Drive Connector, Microsoft SharePoint Connector, or Salesforce Workflow Connector.



Advanced Document Generation Usage

Admins can track the usage of advanced document generation from the **Licensing & Usage** page, under the **Usage** tab.



Under Advanced Document Usage, the following information is available:

- **Current Cycle**: The number of days remaining in the billing cycle.
- **Included**: The number of generated documents allotted to your FormAssembly plan.
- **Used**: The number of generated documents, including test generations.
- **Available**: The number of generated documents that are currently available.

Additional document generation merges can be purchased as needed.