

LAB 6 - CUSTOMIZE LIST FORMS USING FORMSVIEWER

OVERVIEW

This document will show you how to customize the look of your lists upon edit and open it using FormsViewer.

BEFORE YOU START

- This lab assumes that you already have deployed a working version of the Expense Report. If not, please follow the **Expense Report Deployment Guide.doc**.
- This lab assumes that you have gone through Lab 1 through 5 of this training.

ADD JS LINK TO FORM LISTS

1. Open the .js file named **ExpenseReportParentList** included in the Lab 6 folder.
2. Make sure the following variables contain value:
queryString – should have the link of your FormsViewer app (after the **?**). We did this in the deployment guide as well.

templateName – this should have the name of the template we will upload in FormsViewer. Let's just call it **Expense Report Parent List**.

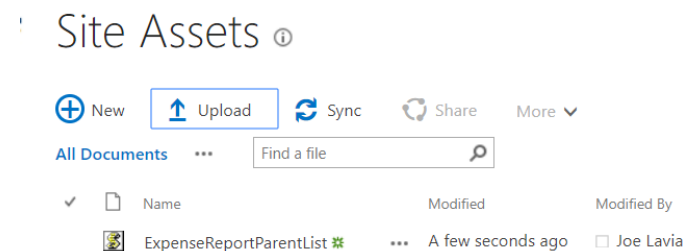
isList – must be **true**.

```

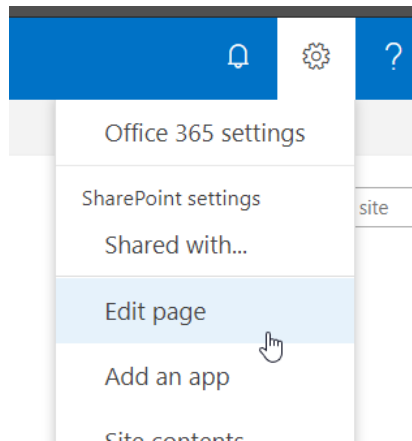
3 // REQUIRED: This is the portion of the URL used
  var queryString =
    'SPHostUrl=https%3A%2F%2Fdelvarequip%2Esharepoint%
    ps%3A%2F%2Fdelvarequip%2D0d579ac18bf5e4%2Esharepoi
4
5 // REQUIRED: Specify the name of the template in F
6 var templateName = 'Expense Report Parent List';
7
46
47 var isList = true;
48

```

3. Save the changes made.
4. Upload the .js file in the **Site Assets** library:

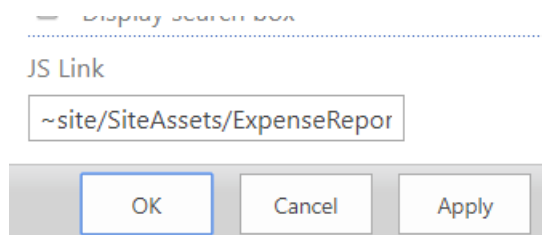


5. Go to the Expense Report parent list (named **Expense Report**). Click on the gear icon and **Edit page**.



6. Edit the **Web part** by adding the js link path under Miscellaneous category:

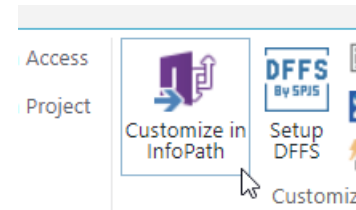
~site/SiteAssets/ExpenseReportParentList.js



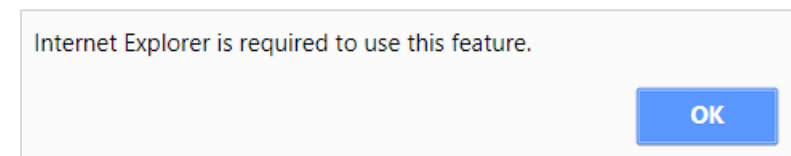
7. Click **Apply** then **OK**. Then under **Page** tab, click **Stop Editing**

DESIGN YOUR LIST

1. Go to the parent list (Expense Report).
2. In the upper-left corner, go to **List** tab then click on **Customize in InfoPath**.



Note: If you're using a different browser other than IE, a dialog box will prompt saying that IE must be used. Switch to IE to download.



3. This will open the list via InfoPath Designer. You will notice that it will include all the columns (shown and hidden) from the list.

(Design) Form1 - InfoPath

Font Styles

Normal Title Heading 1 Heading 2 Label Column L...

Text Bo Combo Date ar

Title	
Attachments	Click here to attach a file
Report Date	
Purpose	
Total	
Status	
Assigned To	
Assigned To Email	
Reviewed By	
Date Reviewed	
Resource Name	



Expense Report

Report Name	
Report Date	
Resource Name	
Purpose	
Total	
Status	

Submit Close

4. Go ahead and edit the form to include only the shown columns. You can do whatever design you like for your list. I did mine like this:

Changes were:

- Renamed **Title** as **Report Name**
- Moved the **Resource Name** up.
- Removed **Attachments** and the last 4 columns.
- Added an Expense Report header and logo.
- Added **Submit** button to save the changes in the list and automatically close the form.
- Added **Close** button to have the option to close the form without saving.

The rules in the buttons should look something like this:

Submit button:

Rules

Button: Submit

Submit

Close form

New

Details for:
Submit

Condition:
None - Rule runs when button is clicked

Rule type:
Action

Run these actions: *
Submit using a data connection: Main Data Connection

☐ Don't run remaining rules if the condition of this rule is met

Rules

Button: Submit

Submit

Close form

New

Details for:
Close form

Condition:
None - Rule runs when button is clicked

Rule type:
Action

Run these actions: *
Close this form: No Prompt

☐ Don't run remaining rules if the condition of this rule is met

Close button:

Rules

Button: Close

Close form

New

Details for:
Close form

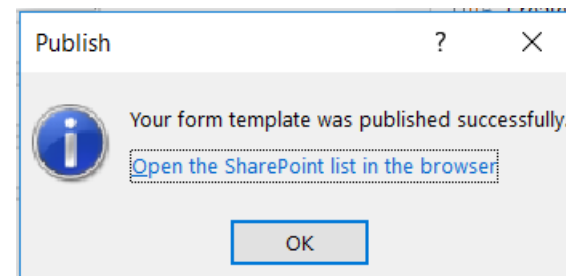
Condition:
None - Rule runs when button is clicked

Rule type:
Action

Run these actions: *
Close this form: No Prompt

☐ Don't run remaining rules if the condition of this rule is met

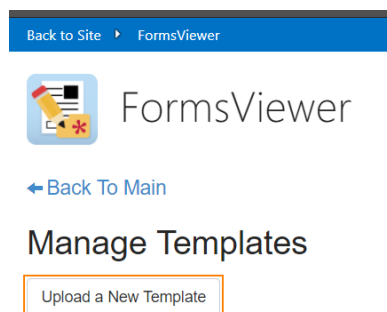
5. Save the XSN file. Let's name it **Expense Report Parent List.xsn**
6. Publish the form by going to **File > Publish > SharePoint List**. Once successful, a dialog box will appear:



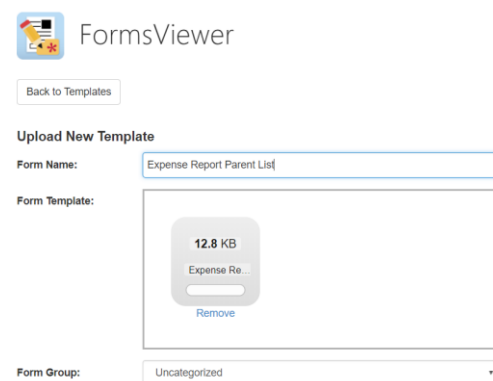
7. Go to SharePoint and select one of the items in the parent list to see the changes you've made.

TEST YOUR FORM!

1. Let's upload the parent list InfoPath template in FormsViewer.
2. Go to **FormsViewer > Upload a New Template**

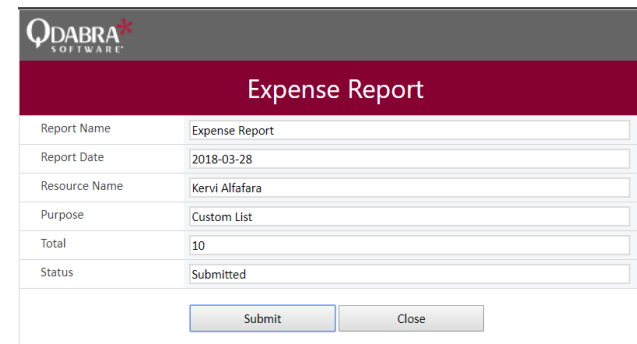


3. Select/drag the xsn file then **Upload**.



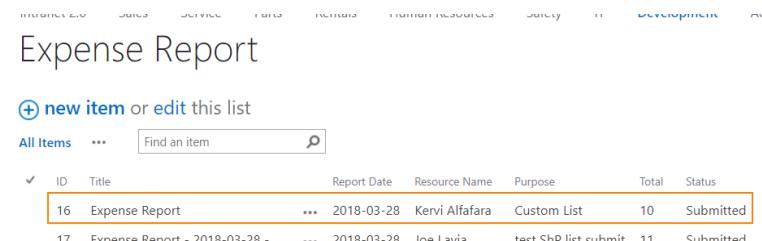
Note: Make sure to enter the same Template Name you entered in the js file.

4. Go to the Expense Report parent list and edit one of the items. Form should now open via FormsViewer and will look the same as below:



Expense Report	
Report Name	Expense Report
Report Date	2018-03-28
Resource Name	Kervi Alfafara
Purpose	Custom List
Total	10
Status	Submitted
Submit Close	

5. Edited values should now reflect in the list:



ID	Title	Report Date	Resource Name	Purpose	Total	Status
16	Expense Report	2018-03-28	Kervi Alfafara	Custom List	10	Submitted
17	Expense Report - 2018-03-28	2018-03-28	Kervi Alfafara	Custom List	11	Submitted

Optional: You may repeat all the steps for the child list (Expense List Items)

CONTACT INFORMATION

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