

CREATE A BASIC FORM FROM SCRATCH AND USE IT IN FORMSVIEWER

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OVERVIEW

This document covers the basics of creating and customizing an InfoPath form template using InfoPath Designer 2013, opening it in FormsViewer, and submitting it to a SharePoint Form Library from there.

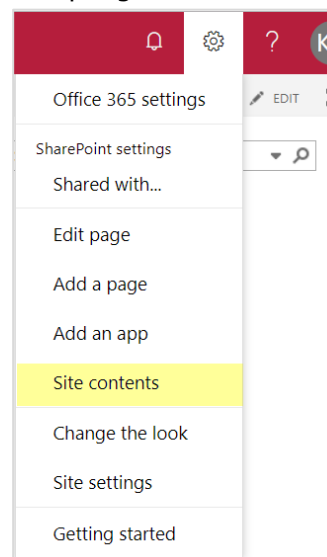
BEFORE YOU START

- Install InfoPath Designer 2013.
- Install the FormsViewer add-in in your SharePoint site.

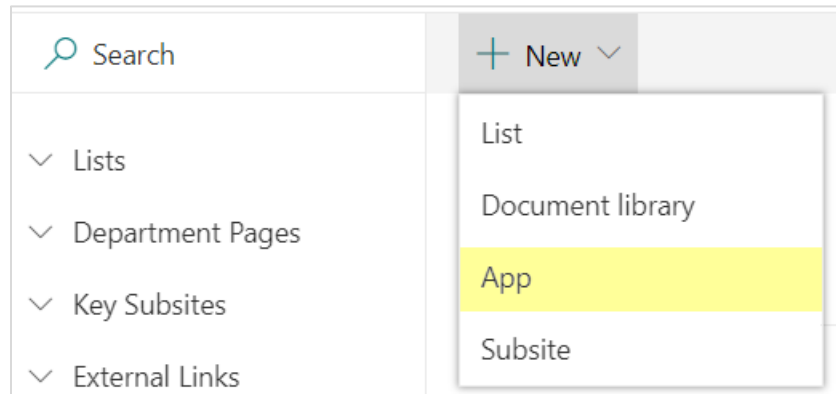
CREATE A SHAREPOINT FORM LIBRARY

A SharePoint form library is like a SharePoint document library, but is used to store InfoPath XML forms instead of other types of documents.

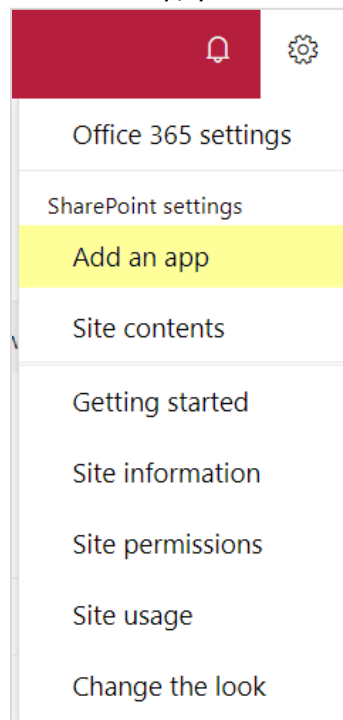
1. Go to your SharePoint site and navigate to the site contents where you want to create the form library. To do this, click the gear icon in the top-right corner and click **Site Contents**.



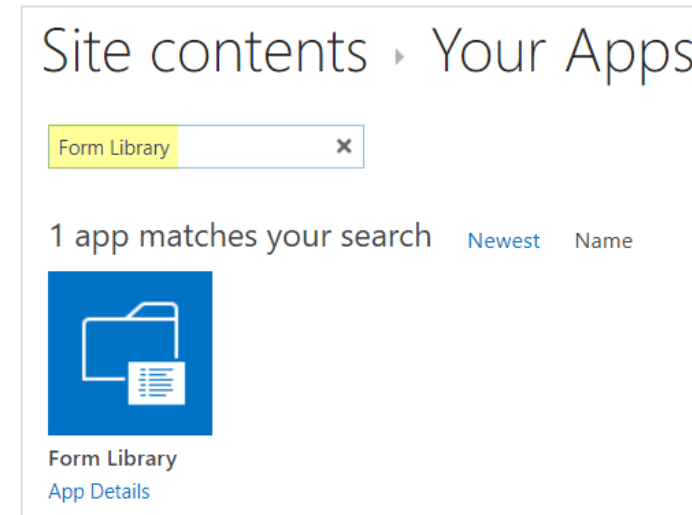
2. Once you're in the **Site Contents**, click the **+New** button and select **App**.



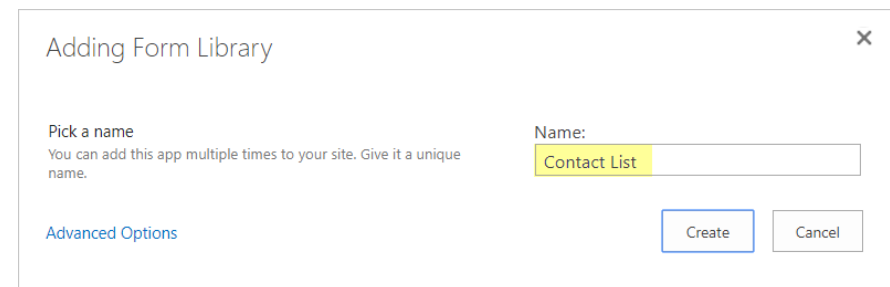
Alternatively, you can click the gear icon and select **Add an app**.



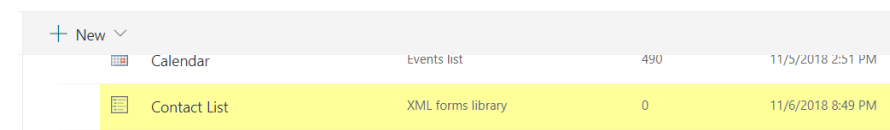
- Next, search for the Form Library app by typing "Form Library" in the search box. Then select the app that appears.



- Give your form library a name. Let's call it "Contact List". Then click **Create**.



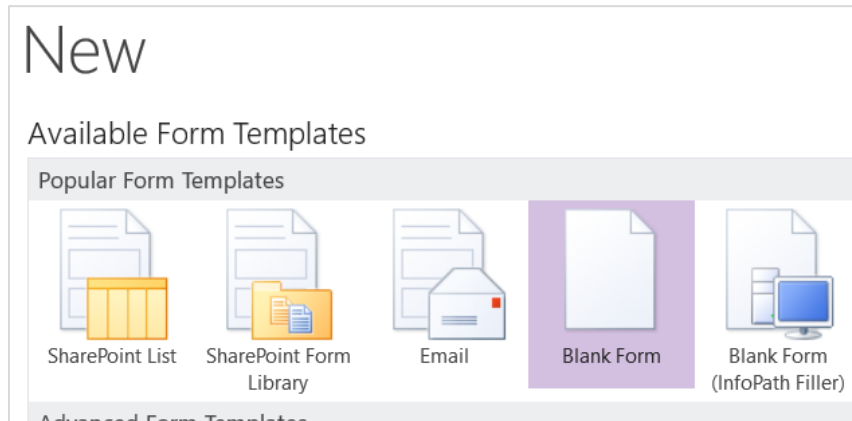
You can now see the Contact List form library in your SharePoint site.



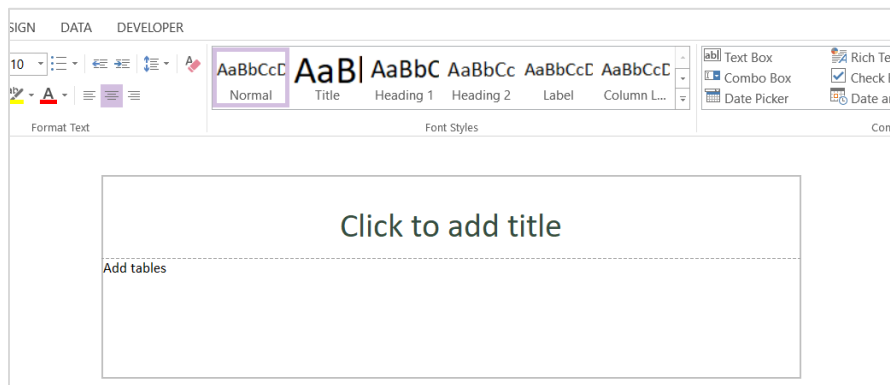
CUSTOMIZE A BASIC INFOPATH FORM

In this section, we're going to use InfoPath Designer 2013 to create the Contact List form.

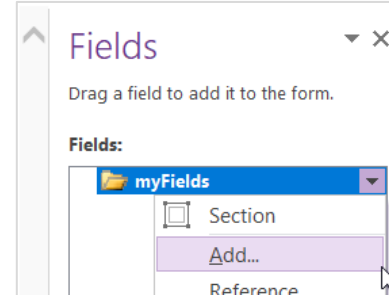
1. Open InfoPath (IP) Designer 2013 in your desktop.
2. In the IP Designer start page, you'll see a wide selection of form templates. Since we're going to create a form from scratch, double click **Blank Form**.



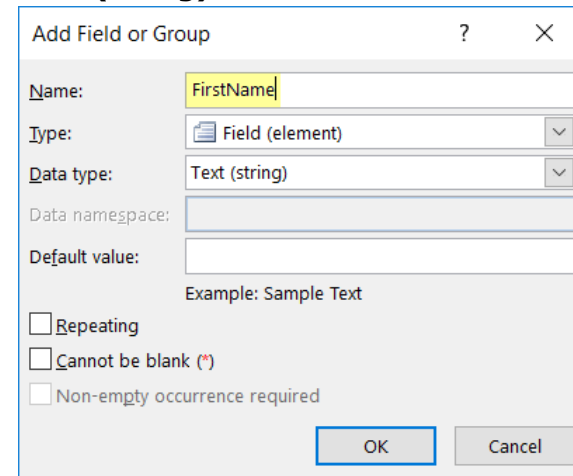
You'll see a plain default layout which will serve as our canvas for our fields and buttons.



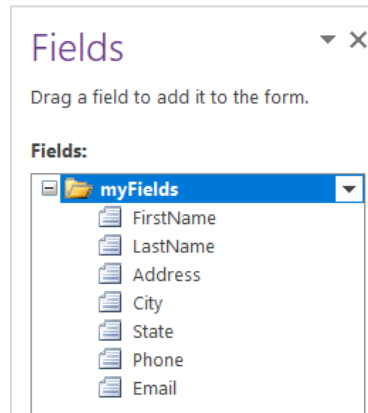
3. First let's add fields to the form. To do this, in the **Fields** task pane, right click the parent node (myFields) and click **Add**.



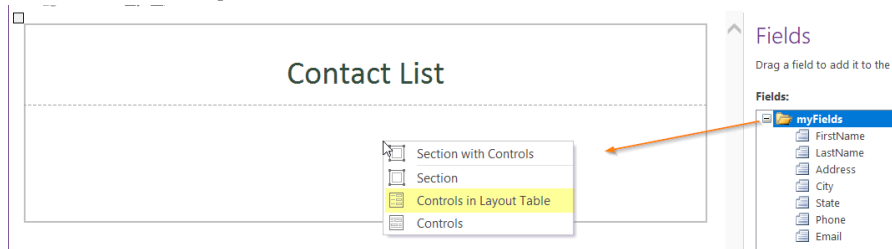
4. Let's call the first field **FirstName** and leave the **Data type** as **Text (string)**.



5. Repeat the same step for the rest of the fields:
 LastName
 Address
 City
 State
 Phone
 Email
 The final fields will look like this:



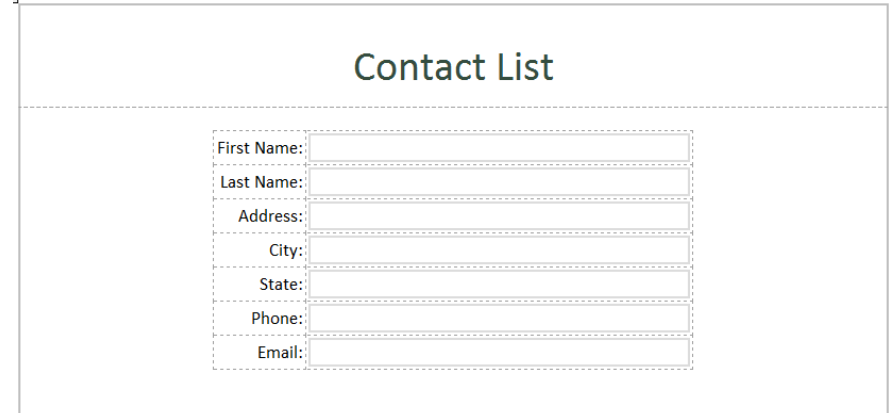
- To add controls in the canvas, right click the myFields parent node. Hold the cursor and drag it to the canvas. In the selection, click **Controls in Layout Table**.



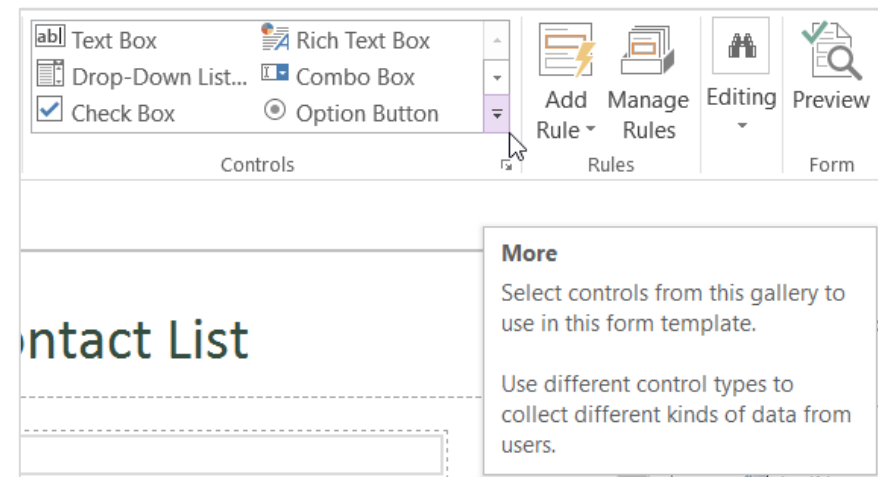
The text box controls will now be added to the canvas.



If you like, go ahead and make some edits to the table to spruce it up with different font styles, colors, and so on.

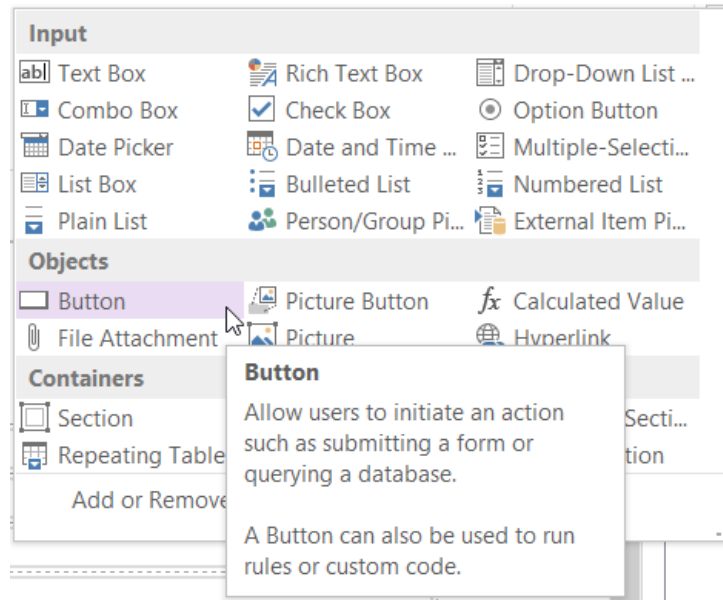


- Let's now add a button that will fire a rule which will submit the entered data to the form library. To do this, place the cursor in the canvas where you want to put the button. Then click the Home tab in the ribbon (if you are not already on the Home tab). In the Controls Pane, select the arrow down button to expand the list of all the controls available.

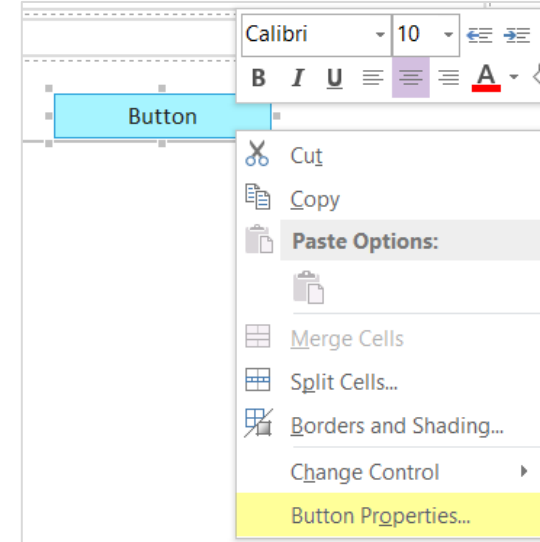


- Select the Button control.

- To rename the button, right click the button and click **Button Properties**.



This will add a button to the canvas.

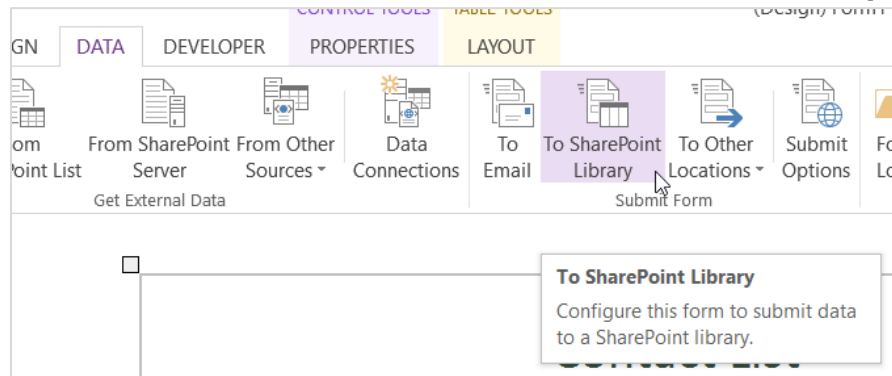


Tip: It is also a good practice to give your buttons meaningful IDs, like btnSubmit.

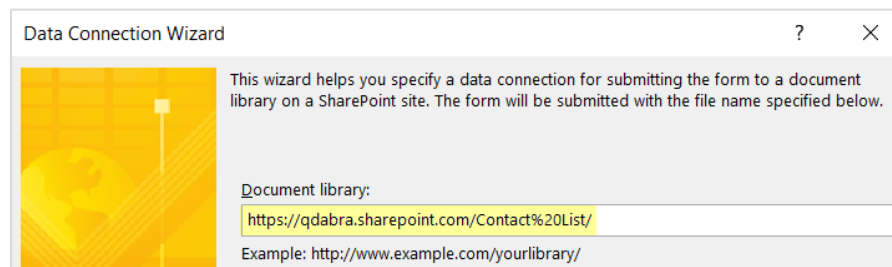
ADD A SUBMIT DATA CONNECTION

Data connections serve as a dynamic link between InfoPath and an external data source such as SharePoint. A submit data connection enables you to specify where the form data is to be submitted.

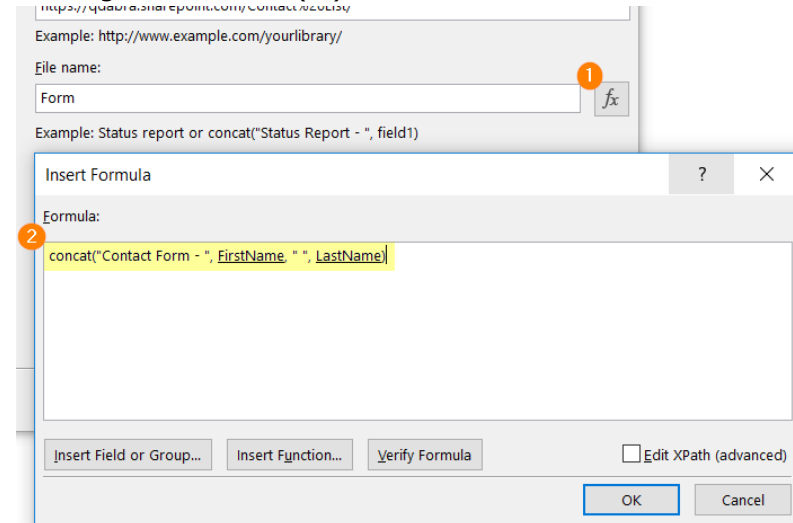
1. Go to the Data tab in the ribbon and click **To SharePoint Library**.



2. In the data connection wizard, enter the URL to the form library we just created. You can copy this URL by going to the Contact List form library in your SharePoint site. It should include the portion of the URL up to the library's name, but not anything after that.



3. In every new form submission, we want to set submit documents with a unique and meaningful name. Customize the file name by clicking the function (fx) button beside the **File name** field.

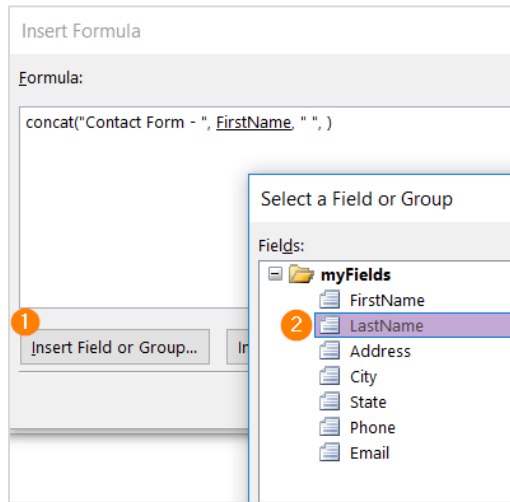


The **concat** function lets you combine two or more fields/texts into one text string. All the text inside the double quotes are static text while the ones that are underlined are dynamic fields.

So for starters, enter the following in the box (there is space here after the first and third commas for adding the FirstName and LastName dynamic fields:

```
concat("Contact Form - ", , " ", )
```

To add a dynamic field, click to place the cursor in the part of the formula where you want to add a dynamic field, and then click the **Insert Field or Group...** button. From the field selection dialog, select the field you want to include as part of the file name.



4. Check the **Allow overwrite if file exists** checkbox. Then click **Next**.

Document library:

<https://qdabra.sharepoint.com/Contact%20List/>

Example: <http://www.example.com/yourlibrary/>

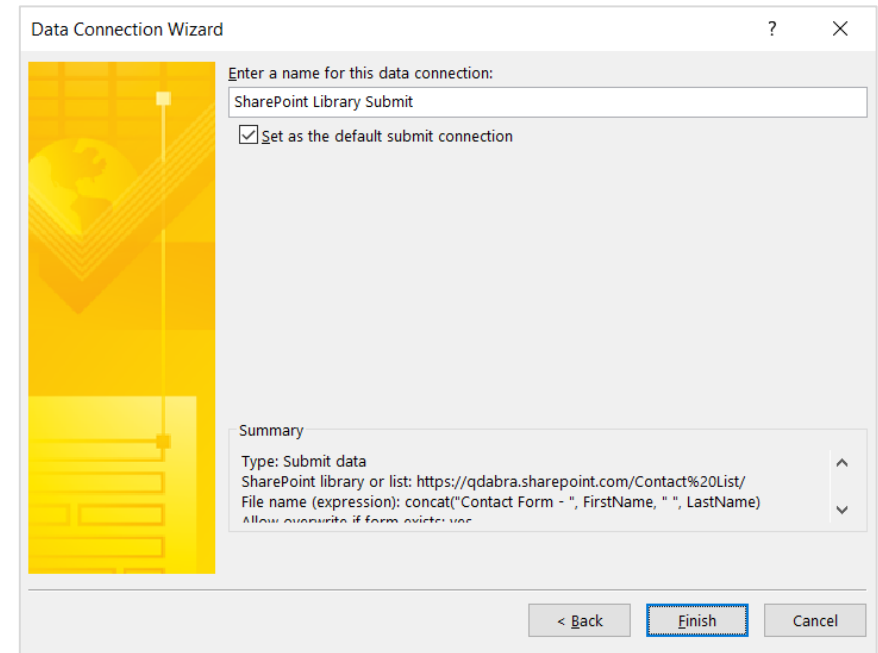
File name:

[concat\("Contact Form - ", FirstName, " ", LastName\)](#)

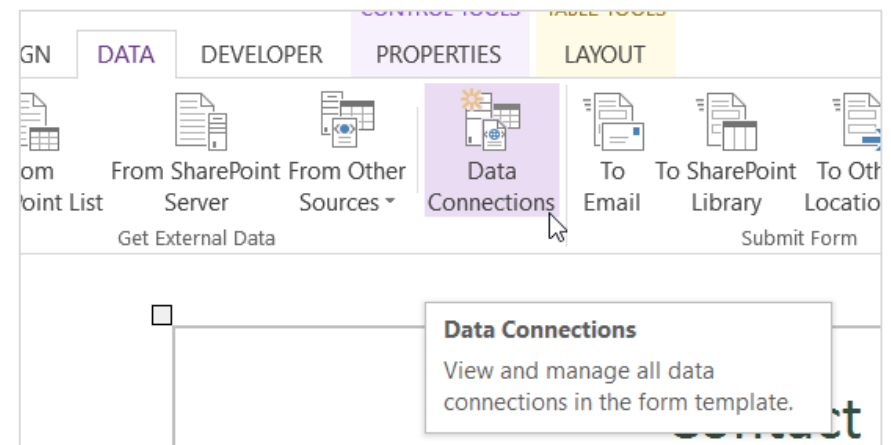
Example: Status report or concat("Status Report - ", field1)

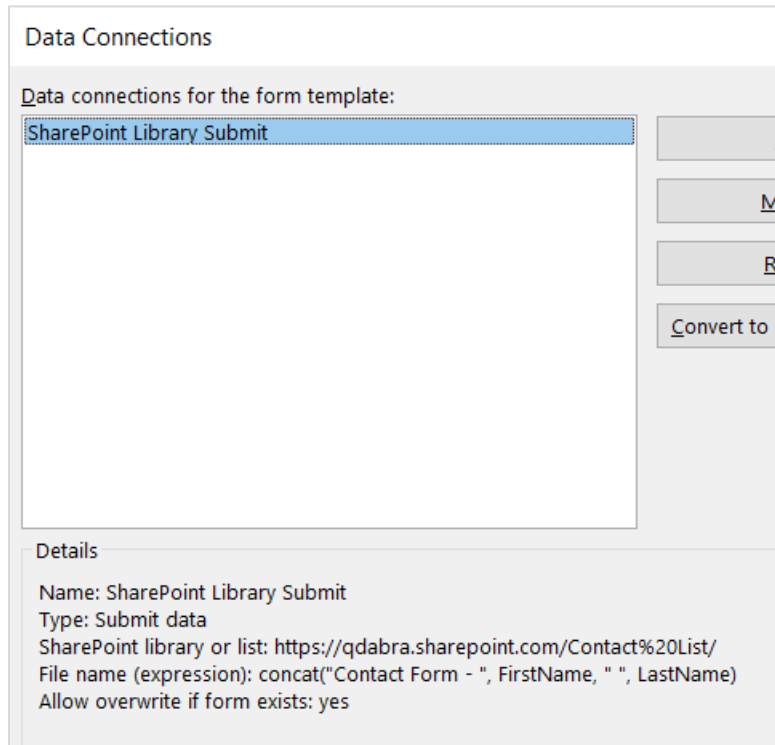
☒ **Allow overwrite if file exists**

5. You can enter a name for the submit connection or just retain the default name like so. Then click **Finish**.



You can view the new submit data connection by clicking **Data Connections** in the Data tab.

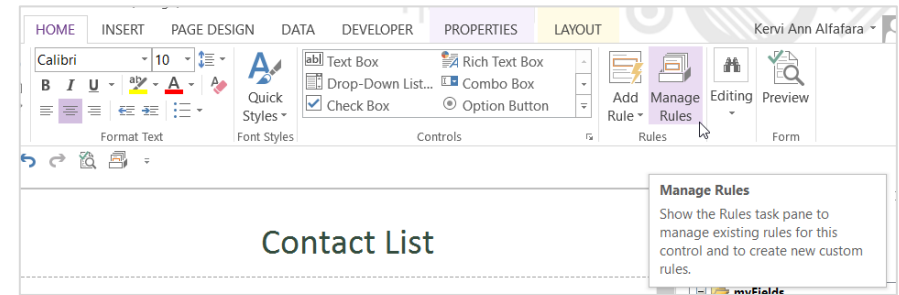




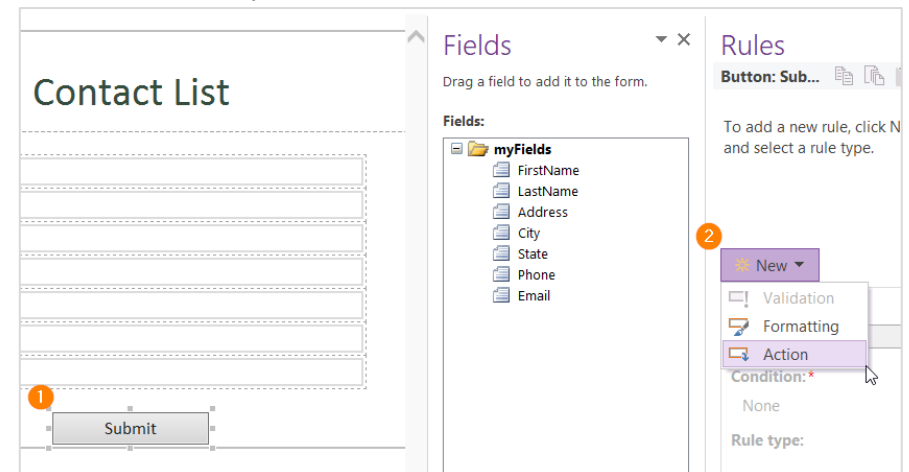
ADD RULES

Rules allow you to control the behavior of a form by performing actions such as retrieving from or submitting data to an external data source. Let's now add a submit rule to our button.

1. In the Home tab, select **Manage Rules**. This will show the Rules task pane.



2. Select the Submit button in the canvas and click **New > Action** in the Rules task pane.



3. Give the new rule a name. Let's call it **Submit to Library**.

Rules

Button: Submit

Submit to Library

Details for:
Submit to Library

Condition:
None - Rule runs when button is clicked

4. To add a submit action for the rule, click **Add > Submit data**.

Details for:
Submit to Library

Condition:
None - Rule runs when button is clicked

Rule type:
Action

Run these actions:*

None

☐ Don't run remaining rules if the

Add

- Switch views
- Set a field's value
- Query for data
- Submit data**
- Close the form
- Send data to Web Part

5. A window will open which will give you the option to select a data connection. Since we only have one data connection, the selection will default to the library submit connection that you just added. Click **OK**.

Rule Details

Action:
Submit data

Data connection:
SharePoint Library Submit

Add...

OK **Cancel**

The action will now be added in the rule:

Button: Submit

Submit to Library

New ▾

Details for:
Submit to Library

Condition:
None - Rule runs when button is clicked

Rule type:
Action

Run these actions: * Add ▾

Submit using a data connection: SharePoint Library Submit

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

6. Save all the changes in the template and name it **ContactListForm**.

File name: ContactListForm

Save as type: InfoPath Web Browser Form Template

The template will have a .xsn file type.

ContactListForm 11/07/2018 2:55 PM Microsoft Info

ContactListForm Properties

General Security Details Previous Versions

ContactListForm

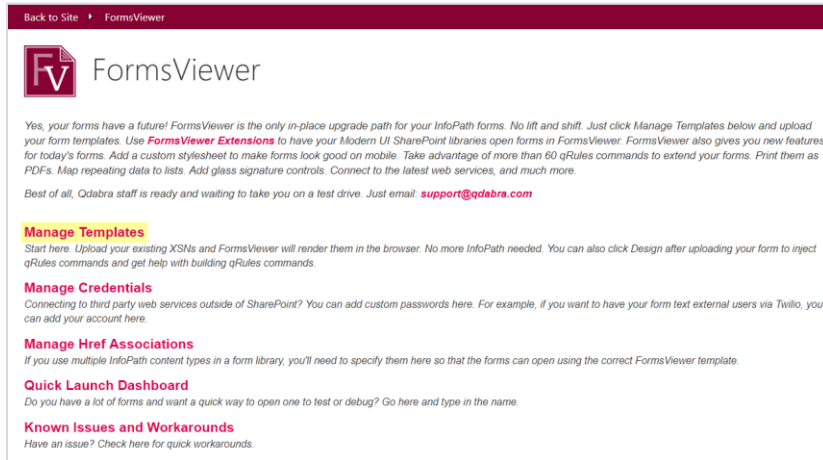
Type of file: Microsoft InfoPath Form Template (.xsn)

Opens with: InfoPath (desktop) Change...

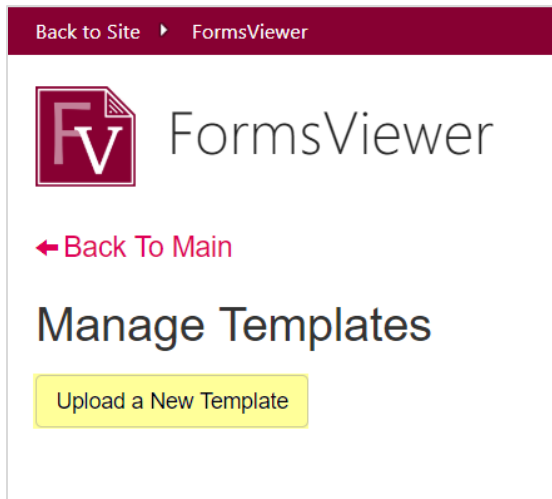
UPLOAD TO FORMSVIEWER

FormsViewer lets you upload your form templates and display them in SharePoint libraries with just a few clicks.

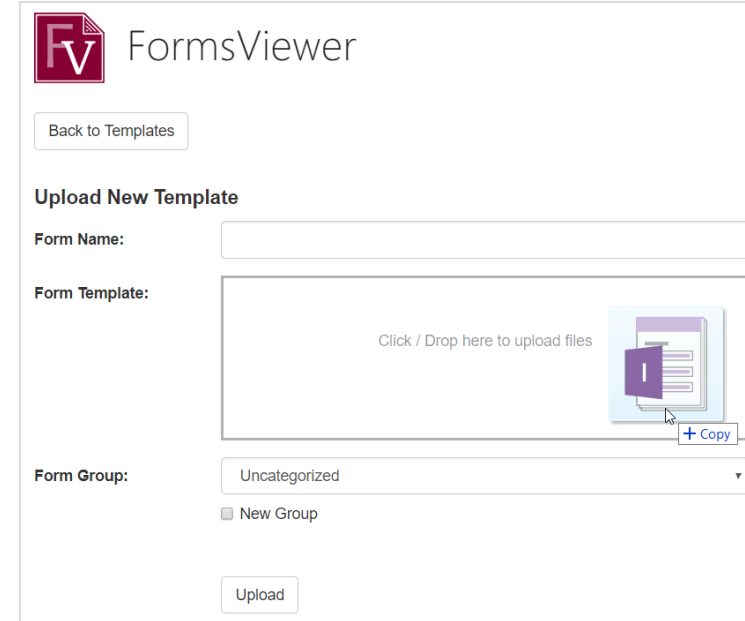
1. Go to the FormsViewer add-in in your SharePoint site.
2. In the FormsViewer Main page, click **Manage Templates**.



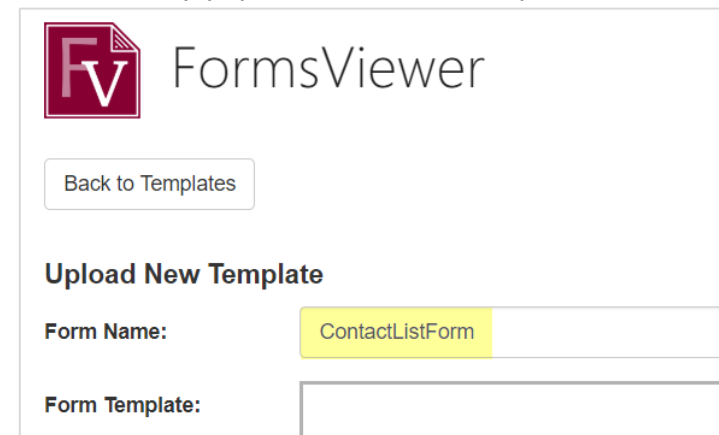
3. Click **Upload a New Template**.



4. You can upload the template by clicking the **Form Template** box or by dragging it into this box from Windows Explorer.



Once the template is attached, the **Form Name** will be automatically populated with the template's name.



For now, we'll leave the **Form Group** as **Uncategorized**.

Form Group:

Uncategorized

☐ New Group

5. Click **Upload**. Once uploaded, you'll see a "Your template has been successfully added." Message in green text.

 FormsViewer

Back to Templates Open Form Open Form (anonymous) Design

Your template has been successfully added.

Update *ContactListForm*

Form Template:

Click / Drop here to upload files

Form Group: Uncategorized

☐ New Group

Upload Download Delete this Template

6. Click **Open Form** to open the form in FormsViewer. This button creates a new, empty form in the template that you added.

 FormsViewer

Back to Templates Open Form Open Form (anonymous) Design

Here's how the form looks when opened in the browser via FormsViewer.

ContactListForm

https://qfs.formsquo.com/FormsViewer/View?SPHostUrl=https%3A%2F%2Fqdabra.sharepoint.com&SPLanguage=en-US&SPClientTag...

Contact List

First Name:

Last Name:

Address:

City:

State:

Phone:

Email:

Submit

TEST YOUR FORM!

Go ahead and fill out the fields in the Contact List form.

Once done, click **Submit**.

Contact List

First Name:

Last Name:

Address:

City:

State:

Phone:

Email:

Navigate to the **Contact List** form library and verify that the XML is successfully submitted.

+ New ↑ Upload ✎ Quick edit ↺ Sync 📄 Export to Excel 🔄 Flow ⋮				
Contact List				
	Name	Modified	Modified By	Check
	Contact Form - Donette Foller.xml	About a minute ago	Kervi Alfafara	

Note:

You won't be able to reopen the submitted XML documents in the form just yet.

We designed a tool to help you configure SharePoint libraries to open forms in FormsViewer. For more details, go to this [link](#) to obtain the **FormsViewer Extensions** package, which provides this functionality.

Congratulations! You have successfully deployed the Contact List Form to SharePoint.

CONTACT INFORMATION

Qdabra Software

218 Main Street

Suite 731

Kirkland, WA 98033

Phone: 877.544.2389

Email: Support@Qdabra.com

Website: <https://www.qdabra.com/>

Community: <http://www.infopathdev.com/>