

Free Training (Lab 2): Make Your InfoPath Form Template Look and Work Better

This is the second of four free labs Qdabra is offering to help people learn how to build InfoPath forms. We're working with a form template for an event (think Evite), and I hope you're already thinking about what electronic form you can create for your company or organization.

In Lab 1, you built the event form template. In this lab, we will:

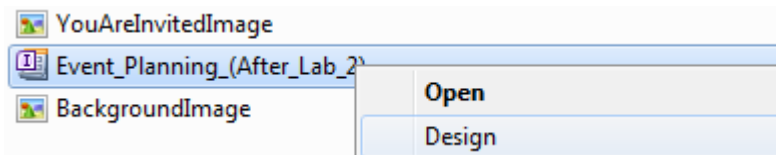
- Add a background image to the form template
- Add a picture control with default image
- Convert the picture control to save as link and upload image to SharePoint using rules
- Configure email notifications in the SharePoint library

ADD A BACKGROUND IMAGE

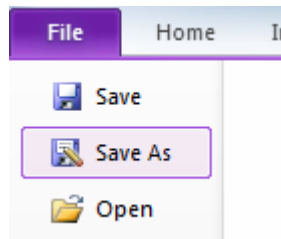
1. Open the Event Planning form you created in Module 1 Lab 1 in InfoPath Design mode (right click and select **Design**).

If you do not have a saved form, you can start with an XSN we provide:

- a) Copy lab2 folder and save it someplace you'll be able to find it again.
- b) Right click on the **Event_Planning_(After_Lab_2)** XSN from lab2 folder , and select **Design**:

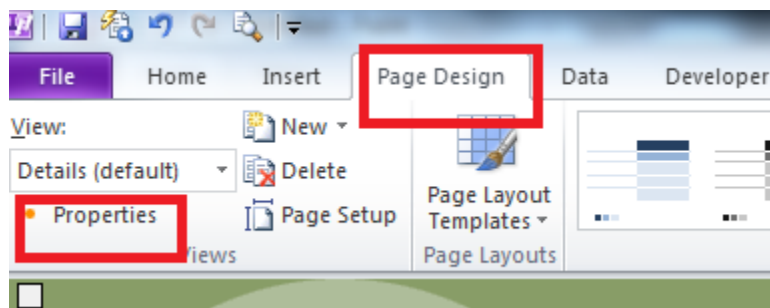


- c) This will open the template in Design mode in InfoPath. You'll need to re-save the template, since it was downloaded from another location. On the **File** tab of the Ribbon, select **Save As**:

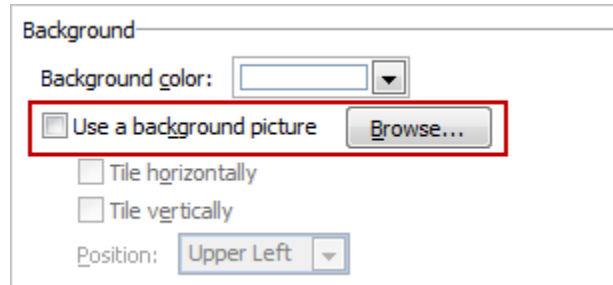


And save the template as **Event Planning**.

2. In the **Page Design** tab, make sure that the *Details (default)* view is selected.



- Click on the **Properties** button. In the *View Properties* dialog, you can customize the background by changing the color and/or using a background image. For the purposes of this lab, we will do the latter. Check the box 'Use a background picture' and browse to an **BackgroundImage.gif** image in your lab2 folder.



- Locate "Background Image.gif" and click **Insert**.
- Check the boxes 'Tile horizontally' and 'Tile vertically' and click **OK**.

Your form should look similar to the below one:



ADD A PICTURE CONTROL WITH DEFAULT IMAGE

1. In the **Main Data Source**, you will see an **image** field. Click on the down arrow > **Properties** and a dialog box opens where you can see the Data Type is set to 'Picture or File Attachment (base64).' Click **OK**. Drag this field onto your canvas, right inside the empty space, and choose **Picture**.
2. Right click on the picture control > **Picture Properties**. select **Specify default picture** and click **Browse**.
3. Locate "YouAreInvitedImage.gif" in your lab folder and click **Insert**.
4. Go to the *Size* tab, leave the **Height** set to auto, and for the **Width**, enter 100%.
5. Click **OK**. You should now see a default image in the picture control (users will still be able to change this image as desired).

The screenshot shows a web form titled "Event Planning Form" with the QDABRA Software logo in the top right. The form is set against a green background with a subtle pattern. It includes the following fields:

- Event Title:** A single-line text input.
- *Host Name:** A single-line text input.
- Telephone:** A single-line text input.
- Location:** A single-line text input.
- Street:** A single-line text input.
- City:** A single-line text input.
- State:** A dropdown menu.
- Zip Code:** A text input.
- Country:** A dropdown menu.
- *Date:** A date picker.
- *Start Time:** A time input.
- *End Time:** A time input.
- Message to Guests:** A multi-line text area.

On the right side of the form, there is a circular graphic with a gold border and a green background. Inside the circle, it says "You're Invited" in a white, elegant font, with a small floral illustration below the text.

CONVERT THE PICTURE CONTROL TO SAVE AS LINK IN SHAREPOINT

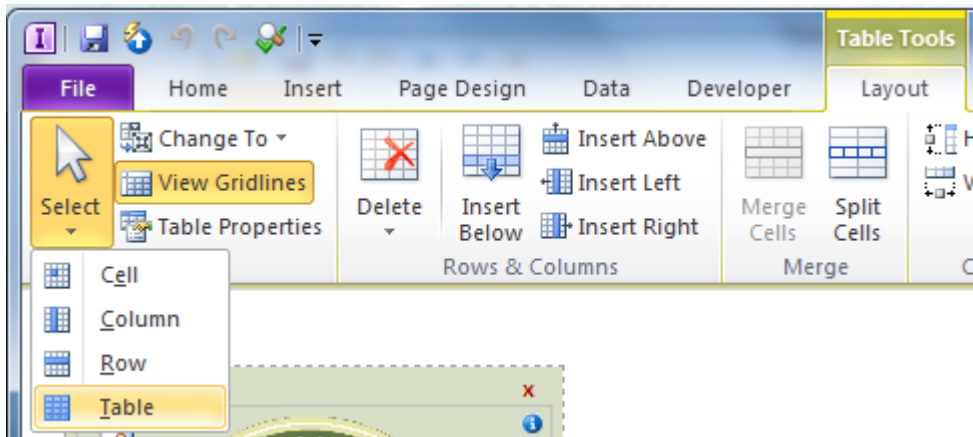
The **SaveToSharePoint** command allows you to save a file, a set of files, an image, or a set of images to a SharePoint document library. This will save a link in the form instead of the actual image and reduce the size of the XML.

1. In InfoPath, from the **Page Design** tab, select the *Designer* view. In this view, you will see a pre-configured layout table and controls that you can use in your form design.

2. Click inside the Image Layout layout table:

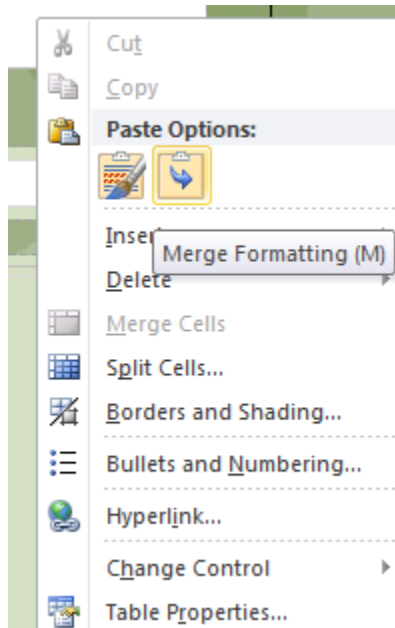


3. In the **Layout** tab > **Select** > **Table**:



Your entire table should now be highlighted in blue. Copy the table to your clipboard by clicking Ctrl + C on your keyboard.

4. In the **Page Design** tab, select **Details** to switch back to the details view.
5. Remove the picture control that you have added in the previous section of this lab by highlighting and deleting it.
6. Place your cursor in the empty section, right click, **Paste Options** > **Merge Formatting**.

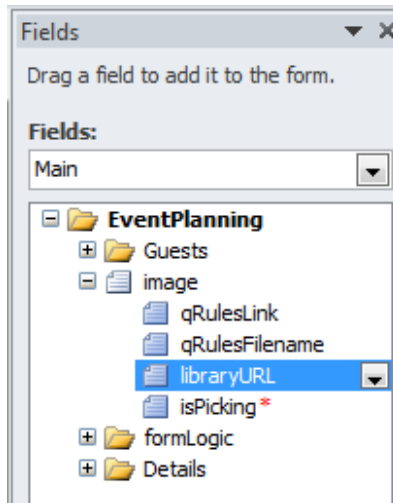


You should be able to see the image below:



Extra credit: Let's take a quick look on how rules work.

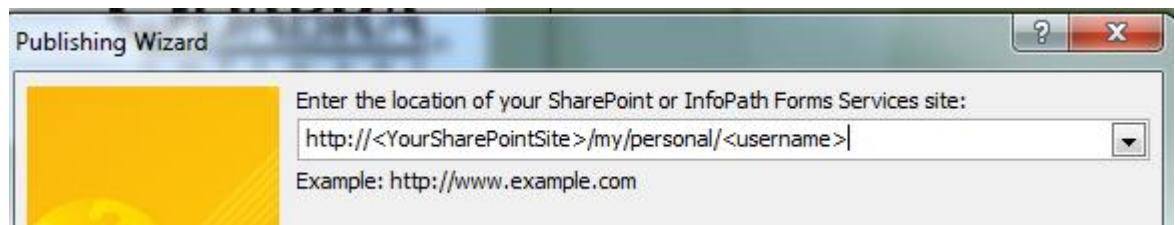
- a. Return to the designer canvas (**Page Design > View > Designer**). From the **Home** tab > **Manage Rules**. Click the Upload Image button in the table. There are two rules associated with this button; select the SaveToSharePoint rule. The first action in this rule calls the qRules SaveToSharePoint command.
 - b. To view the command syntax being used, click on that action, and then click on the **fx** button. This command saves the content of the **image** field (specified in the */xpath* parameter) to the SharePoint library URL (specified in the */url* parameter). Click **OK** two times to close all the dialogs.
7. To set the library URL where our images will be saved to, go to the Main Data Source and double-click on the **libraryURL** field.



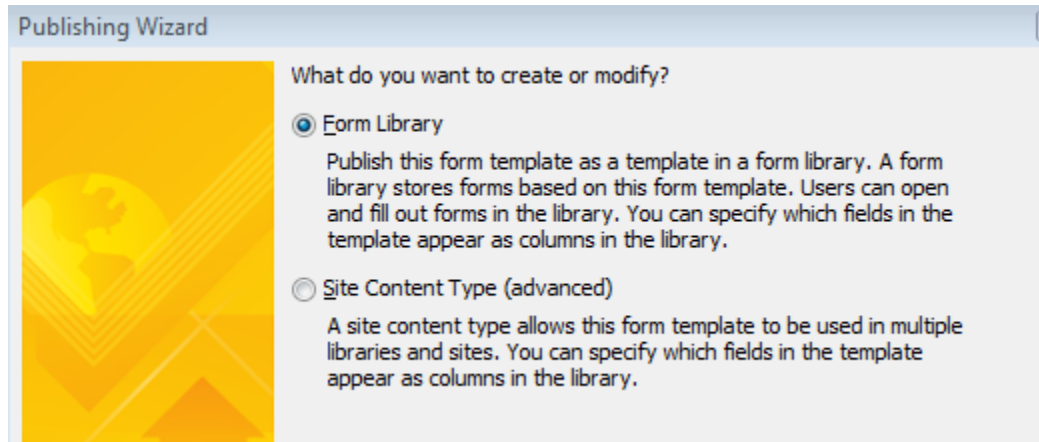
8. In the *Default Value* section of the *Data* tab, enter your SharePoint library URL, that is:
<http://<YourSharePointSite>/my/personal/<username>/<YourDocLibrary>> replacing
 <YourSharePointSite> <username> and <YourDocLibrary> with your actual SharePoint site url,
 actual user name and the document library name on your My Site where you would like to save
 your images. Click **OK** when done.
9. Save your InfoPath form template (**File > Save**).

PUBLISH TO SHAREPOINT LIBRARY

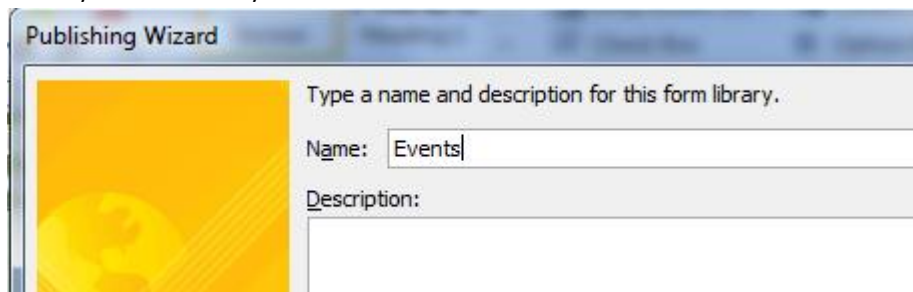
1. Select **File > Publish**. If you've previously published this form to your SharePoint library, you can use the Quick Publish button (make sure the URL displayed by the Quick Publish button is for your form library). If it is not you will need to choose **SharePoint Server**:
 - a) The Publishing Wizard opens. Enter the URL to your SharePoint My Site and click **Next**.



- b) Keep the default "Form Library." Click **Next**.



- c) If you created a form library in Module 1 Lab 1, you can publish to that. Otherwise, keep the default "Create a new form library." Click **Next**.
- d) Name your form library **Events**:



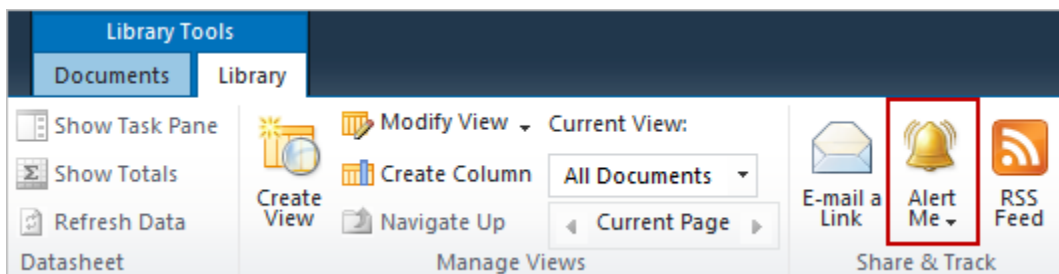
- e) **Next > Next > check Open this form library > Publish.**

To test your image control, click **Add document** when your SharePoint document library opens. **Pick new image > Click here to insert a picture** and upload any image from your local machine. On successful upload, you should be able to see a new image submitted into your SharePoint library.

CONFIGURE EMAIL NOTIFICATIONS IN THE SHAREPOINT LIBRARY

SharePoint 2010 allows us to configure notifications to a single user and/or group either through email or text message (SMS). For the purposes of this lab, we will set up email alerts.

- Go to your SharePoint library and switch to the **Library** tab of the *Library Tools* menu, then click on the **Alert Me** button:



2. In the *Alert Me* options, select **Set Alert on this library**.
3. Complete the *New Alert* wizard:
 - a. Enter the title for the alert. The title will be included in the subject of the notification sent for the alert so we'd want something descriptive; something like '*New items*'.
 - b. In the *Users* field, enter the user name or e-mail address of the person(s) and/or group(s) whom you wish to send alerts to. Separate multiple entries with semicolons.
 - c. Leave the default delivery method to send alerts via email using your email address.
 - d. For the 'Change Type', you can specify the type of changes that you want to be alerted to. For this lab, we'd only want to receive notifications when new items are added, so select that option.
 - e. You may also specify whether to filter alerts based on specific criteria, or restrict your alerts to only include items that show in a particular view. Leave the default filter to send alert when anything changes.
 - f. Leave the default frequency to send notification immediately.

Your new alert settings should be similar to this:

Alert Title Enter the title for this alert. This is included in the subject of the notification sent for this alert.	New items
Send Alerts To You can enter user names or e-mail addresses. Separate them with semicolons.	Users: Mel Balsamo ;   
Delivery Method Specify how you want the alerts delivered.	Send me alerts by: ☒ E-mail @Qdabra.com ☐ Text Message (SMS) ☐ Send URL in text message (SMS)
Change Type Specify the type of changes that you want to be alerted to.	Only send me alerts when: ☐ All changes ☒ New items are added ☐ Existing items are modified ☐ Items are deleted
Send Alerts for These Changes Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.	Send me an alert when: ☒ Anything changes ☐ Someone else changes a form ☐ Someone else changes a form created by me ☐ Someone else changes a form last modified by me ☐ Someone changes an item that appears in the following view: My Documents
When to Send Alerts Specify how frequently you want to be alerted. (mobile alert is only available for immediately send)	☒ Send notification immediately ☐ Send a daily summary ☐ Send a weekly summary Time: Thursday 4:00 AM

4. Click **OK**.
5. You should receive an email for the new alert that you have successfully created.

Subject: You have successfully created an alert for 'New items'

Alert 'New items' has successfully been added on '[Qdabra SharePoint](#)'.

You will receive alerts according to the delivery method, timing and criteria that were selected when the alert was created.

You can change this alert or any of your other alerts on the [My Alerts on this Site](#) page.

You are now finished with Lab 2. We'll release Lab 2 Friday, July 16. If you have any questions, feel free to post them to the [Newbie Questions](#) forum. Once you've complete these labs, you'll be ready to become an InfoPath master. Learn about our in-person and online [options](#).

Requirements for the free training labs:

- Microsoft InfoPath 2010 and Microsoft SharePoint 2010 (contribute permissions) - parts of the labs can be completed without SharePoint. While most of the labs can be completed with InfoPath 2007, the instructions and screenshots are for InfoPath 2010.