Using InfoPath Forms with SharePoint Workflows

Demo Tips:

1. Open each account in a different browse session so you can show two accounts at one time. Example Jeffrey.giangiulio in one browser and demomanager1 in another browser.

First Step to using InfoPath Forms with SharePoint is to create a Form Library and Publish the InfoPath Form to it.

Overview:

- Create SharePoint Form Library to store Expense forms
- Create the InfoPath Form. We will be using the ready-made Expense Report template in Office InfoPath 2007
- Promote certain fields from the form as columns in the form library. Office InfoPath 2007 makes it very easy to publish a form, promote fields, and even create the form library. All this can be done by using the Publishing Wizard (click **Publish** on the **File** menu).

Procedure:

1. Start Office InfoPath 2007.
2. In the **Fill Out a Form** dialog box, under design a form you will see sample forms. Double-click the sample expense report.

   The expense report opens in Design mode. The form already has the fields that you want to promote as columns in the form library: Name, ID Number, and Total expenses. You will use the template as is.

3. On the **File** menu, click **Save As**. We will save the file locally as Expense Report as a backup.
4. On the **File** menu, click **Publish**.

   The **Publishing Wizard** opens.

5. Under **Where do you want to publish the form template?**, click **To a SharePoint server with or without InfoPath Forms Services**, and then click **Next**.
6. Type the address of your SharePoint site, and then click **Next**.
7. Under **What do you want to publish?**, click **Document Library**, and then click **Next**.

   Note that you can also make the form available as a content type. You might want to choose this option, for example, if you want the make the form template available to all subsites in a portal site.

8. Under **What do you want to do?**, click **Create a new document library**, and then click **Next**.

9. Type **Expense Reports** as the name, type a description for the document library, and then click **Next**.

10. On the next page, click **Add**.

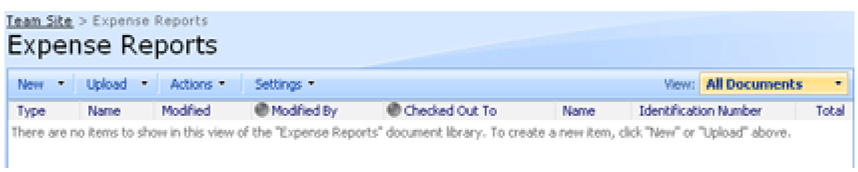
11. In the **Select a Field or Group** dialog box, in the **employee** folder, click **name**, and then click **OK**.

12. Repeat the previous step twice to add the **identificationNumber** field (in the **employee** folder) and the **total** field (in the **items** folder).

    NOTE In the **Select a Field or Group** dialog box, use the default settings for **Site column group** and **Column name**. Alternatively, you could map the form field to an existing site column or give the column a name different from that of the form field itself.

13. Click **next**, verify that the information is correct, and then click **Publish**.

    You now have a form library named Expense Reports with the columns that you need to create workflows



14. Since we are using a sample form we need to change the Submit Options that were previously set. Under the **Tools** menu, click **Submit Options**.
15. Change **Email** to **Send form data to a document Library.**
16. Add a **data connection** and connect to the document library just created during publishing. Also for this step we will quickly add a custom formula so that each time a form is submitted it makes a new name.

    Sample Formula: concat("Expense Report - ", name, " - ", expenseCode)

    Also select the checkbox **Allow Overwrite if file exists**.

    You can choose many onsubmit options from this section
17. Publish the form again.
18. Now go back inside SharePoint update the name displayed when creating a new form:
    1. Under the **Settings** menu, click **Form Library settings** choose **Advanced Settings.** Turn **Content Types on**. Also if you want the form to open using forms services in the browser select the option to **open in browser** under **Advanced Settings.**

2. Under the **Settings** menu, click **Form Library settings.** Click on the **Form Content Type** and change the name to Expense Report. Now when you click the new button it will say new Expense report in*stead of New form. Much more descriptive!*

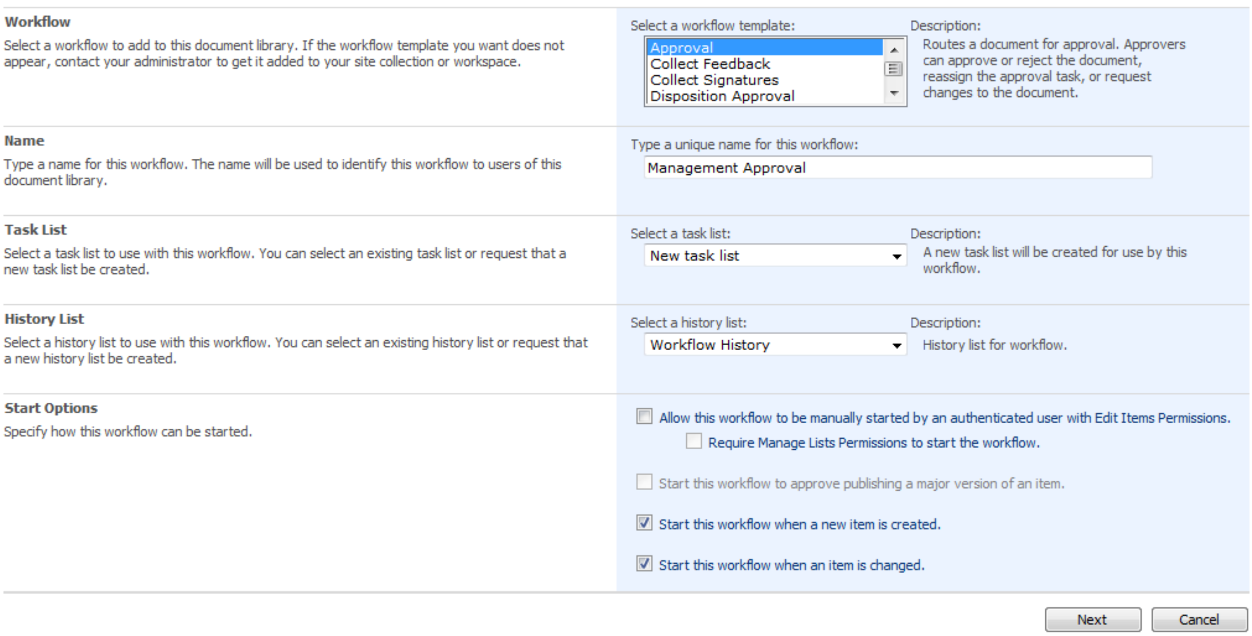
Attaching an "Out of the Box" Approval Workflow to the Expense form

Overview:

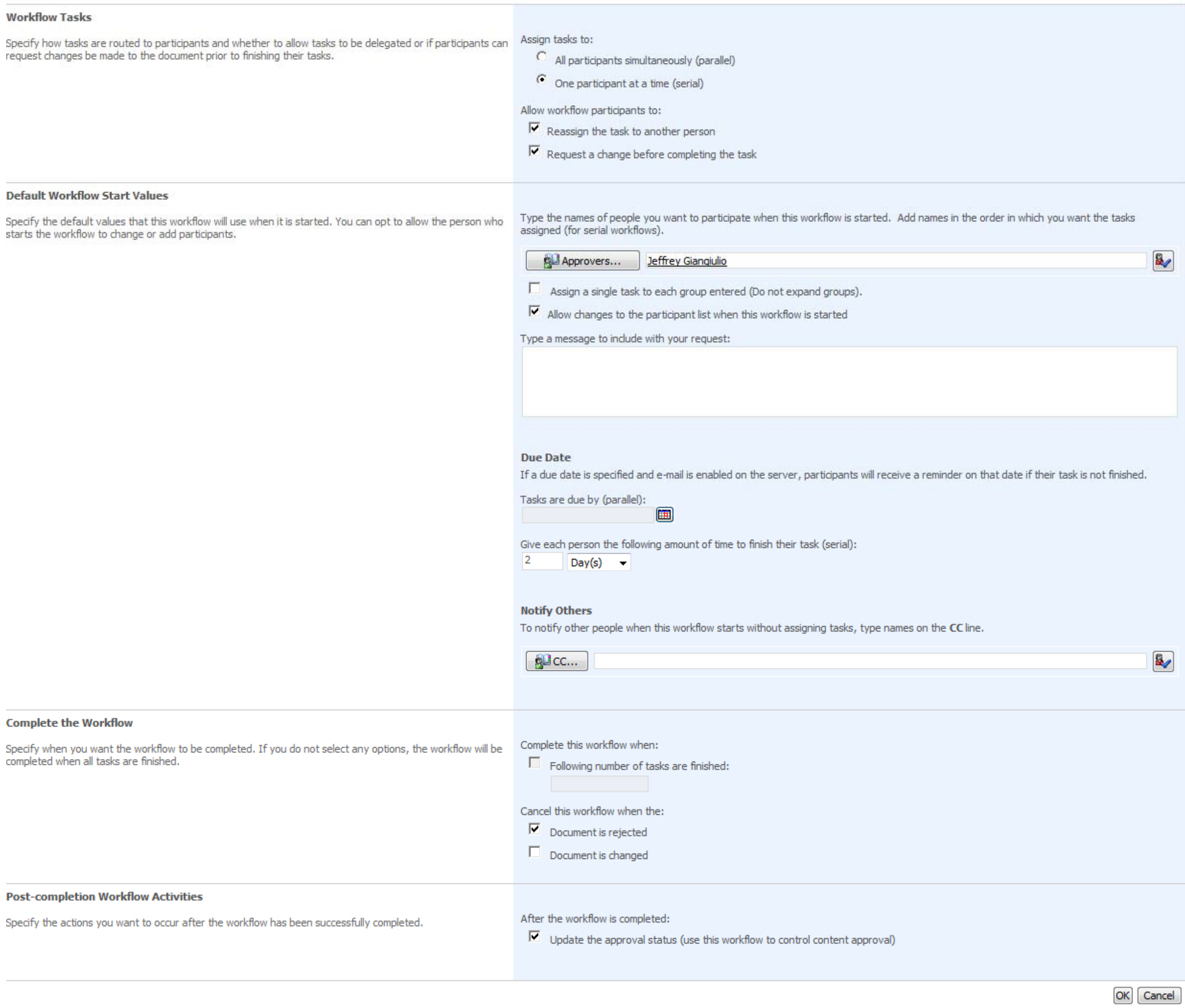
- Assign an Approval Workflow to All Forms in added to this Expense Report Library
- Run through Approval Process
- Group the library according to Approval

Procedure:

1. Under the **Settings** menu, click **Form Library settings** choose Workflow Settings to **Add a workflow.**
2. Provide the following Settings on Page 1.



3. Provide the following Settings on Page 2.



Note: Approvers must have approval level permission or above on this Form Library.

3. Additionally you may want to **sort** the view by **approval status**. Navigate to View -> Modify this view. Set Sort By to the **Workflow Status Column.**
4. Now create a new expense Report and this will kick off the **Approval Workflow**. The managers listed in the workflow will be notified for approval
5. **Explain** how they must have approval permissions or above to approve the workflow.
   a. **Notice Demomanager1 is only an approver and does not have the doc library settings menu.**

Attaching an Designer Workflow to the Expense Form. This workflow will check if the expense amount requested exceeds $500.00. If the amount is greater than 500, a specific manager or CEO will be notified for review.

1. Start Microsoft Office SharePoint Designer 2007.

2. On the **File** menu, click **Open Site**.

3. In the **Open Site** dialog box, browse to and select the SharePoint site where you want to create the workflow, and then click **Open**.

4. On the **File** menu, point to **New**, and then click **Workflow**.

   The **Workflow Designer** opens.

5. In the **Give a name to this workflow** box, type **Expense Report Review**.

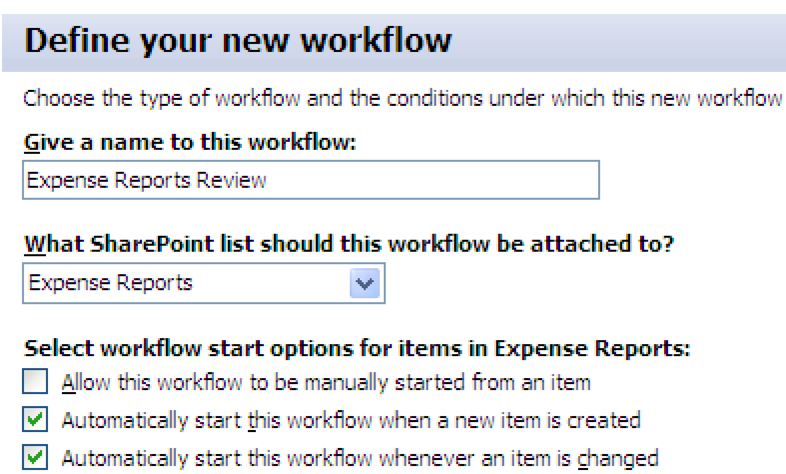
   Site visitors will see this name when they view the Workflow Status and Workflows pages in the browser.

6. In the **What SharePoint list should this workflow be attached to?** list, click **Expense Reports**.

7. Under **Select workflow start options for items in Expense Reports**, do all of the following:

   - Clear the **Allow this workflow to be manually started from an item** check box.
   - Select the **Automatically start this workflow whenever an item is created** check box.
   - Select the **Automatically start this workflow whenever an item is changed** check box.

   By choosing these options, you ensure that the workflow runs whenever a team member fills out a new expense report or modifies an existing report.



8. Click **Next**.

You want to create a rule where if total expenses reported in the form are greater than 500 dollars, the appropriate person is notified to review the expense report.

9. In the **Workflow Designer**, click **Conditions**, then select **Compare Expense Report Field .**

10. In the condition **If value equals value**, click the first **value** hyperlink and set the Value to Total.

11. In the workflow rule, click **equals**, and then click **is greater than** in the list.

12. Click the second **value** hyperlink, and then type **500**.

13. Click **Actions**, and then click **Send an Email** in the list.

    If this action does not appear in the list, click **More Actions**, click the action that you want, and then click **Add**.

14. In the action **Email this message**, click **this message**, and then complete the form by entering the recipient, subject, and body text of the message.

    For the recipient, choose the person who must review the expense report.

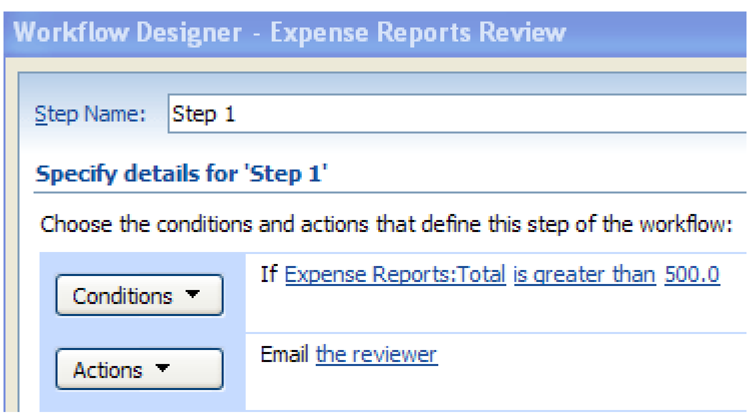
    You can also add any lookups you wish such as the url to the Report.

Example Text:

Please review the following Expense Report.

http;//mossdev:8091 <url path variable.

15. Click **OK**.



You now have a rule where if an expense report is created or changed in the Expense Reports library, and the total expenses for that report are greater than 500 dollars, the correct person is notified to review that report.

16. To check the workflow for errors before you exit the **Workflow Designer**, click **Check workflow**.

    If there is a workflow error, the hyperlink changes color and asterisks appear before and after the invalid parameter. In addition, under **Workflow Steps**, an error symbol appears next to each step that contains an error.

17. Click **Finish** to save the workflow.

    To test the workflow, browse to the Expense Reports library, click **Fill Out This Form** to create a new item, and make sure that you enter expenses greater than 500 dollars. Save the form to the form library, and then check to see if the designated person receives the message that you created.