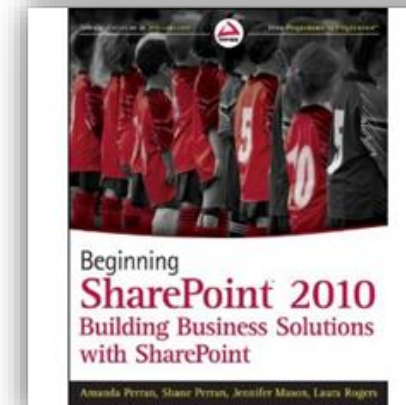# What I'll Cover

- Getting Started!
- The Basics of Forms
- Automating Process with Workflow
- Designing an Engaging Interface
- Questions

About me...

- Blog:
  - http://www.jenniferannmason.com
- Twitter: @jennifermason
- Skype: RackspaceJenn

Today's Process Automation

- Travel Request
  - SharePoint Site
  - SharePoint Lists
  - InfoPath Form w/ Internal Workflow
  - Custom SPD Routing Workflow

The Product Components

Process Components

- What is being approved or routed?
  - InfoPath form?
  - SharePoint List form?
  - Document in a library?

- Tasks, Emails
- User Interface

The SharePoint site

- Travel Request Form
  - This is the main list for the requests themselves. Workflow is based on this list.

- Travelers
  - For your first request, fill out information such as frequent flier and airplane seat preferences

- Tasks
  - These are assigned to approvers throughout the workflow

Our Process Flow

Travel Request Submitted
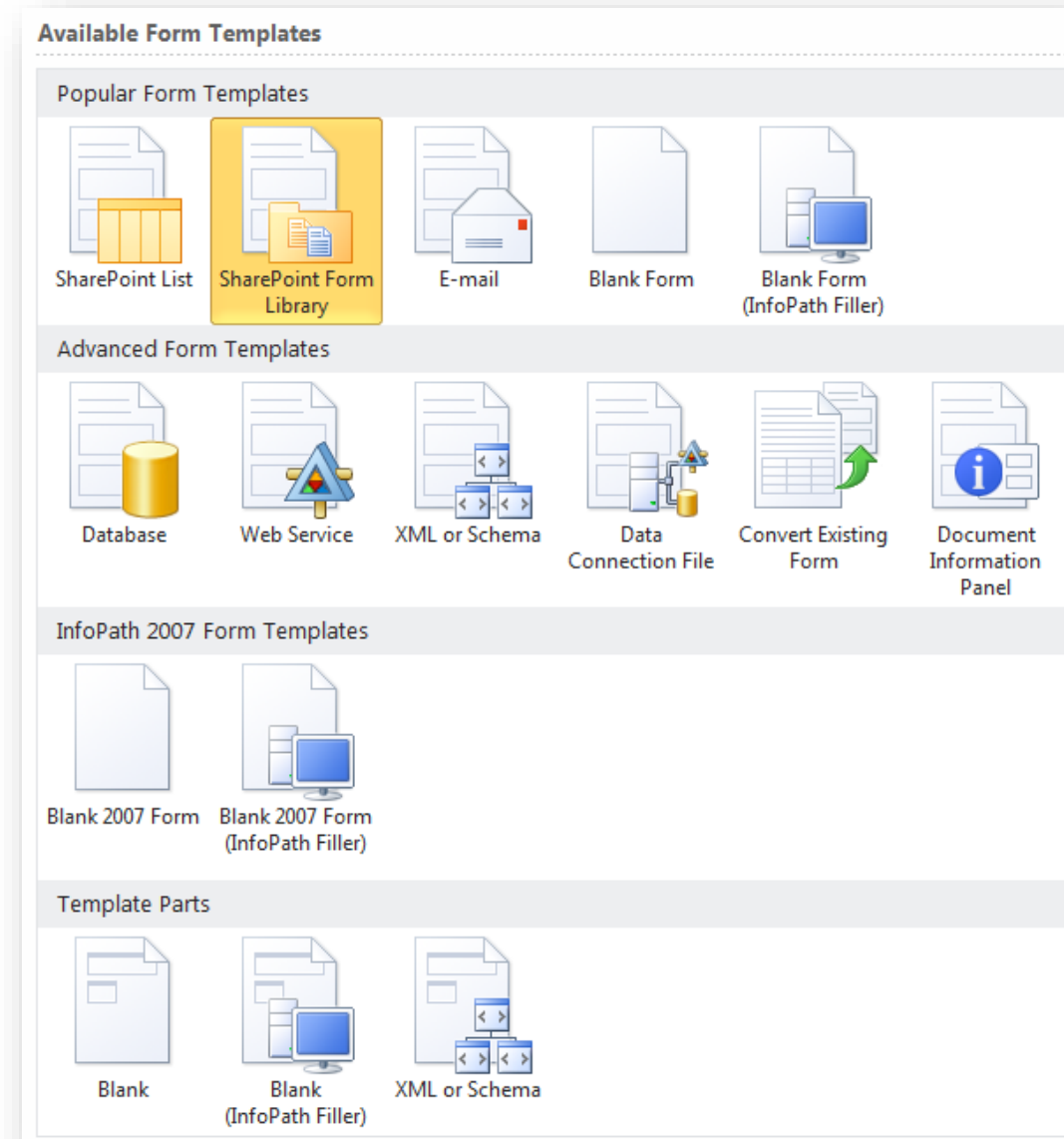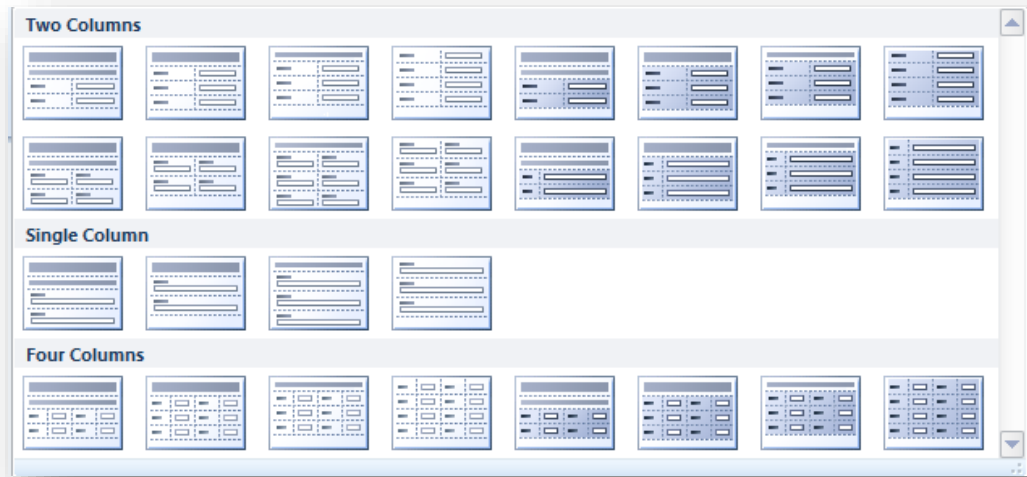
Manager Approval

Completion

Creating and Filling Out a Form

- **SharePoint List**
  - Very simplistic. Quick but less functionality

- **SharePoint Form Library**
  - My common choice

- **Advanced Form Templates**
  - Rarely needed

- **SharePoint 2007**
 - For backwards Client Compatibility

Form Layouts

- On the Page Design tab, pick a page template layout first
- On the Insert tab, insert needed sub-tables
- Pick a color scheme to use

Form Controls

- Controls – all the stuff that gets filled out
- Use tables in the form to arrange the controls
- Inputs –collect info from the person filling it out
- Objects – objects such as buttons can have a list of rules with actions that happen when clicked
- Containers – repeating tables allow multiple list items to be entered. Optional sections can be used to hide or show controls or text conditionally.
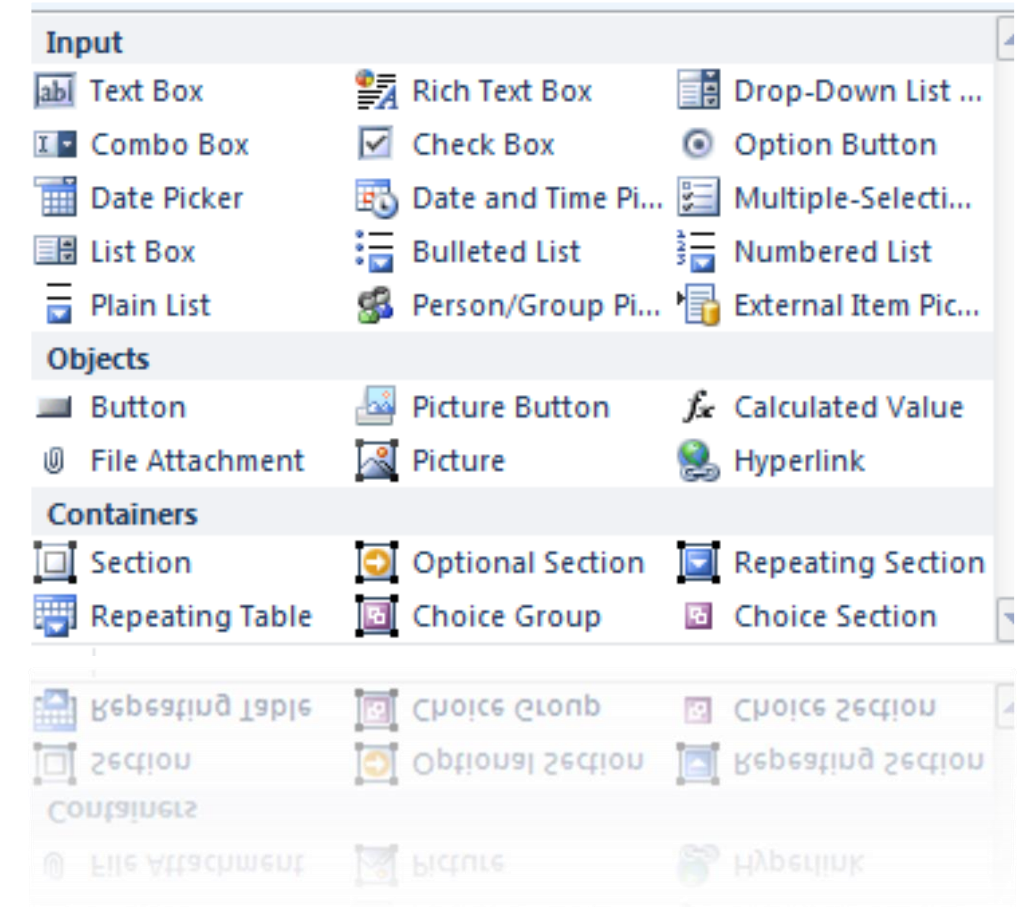
Publishing the Form

- **Publishing to SharePoint**
  - Browser-based is most common: it doesn't matter what software client machines have installed.
  - Form library is most common, preferred

- **Why is the form library preferred?**
  - Administrator-approved is only necessary when the form needs to be used in multiple site collections in the farm.
  - Site Content Type – just plain hard to deal with, update and test a form this way.

- **Property promotion** – pick fields needed as columns in SharePoint.
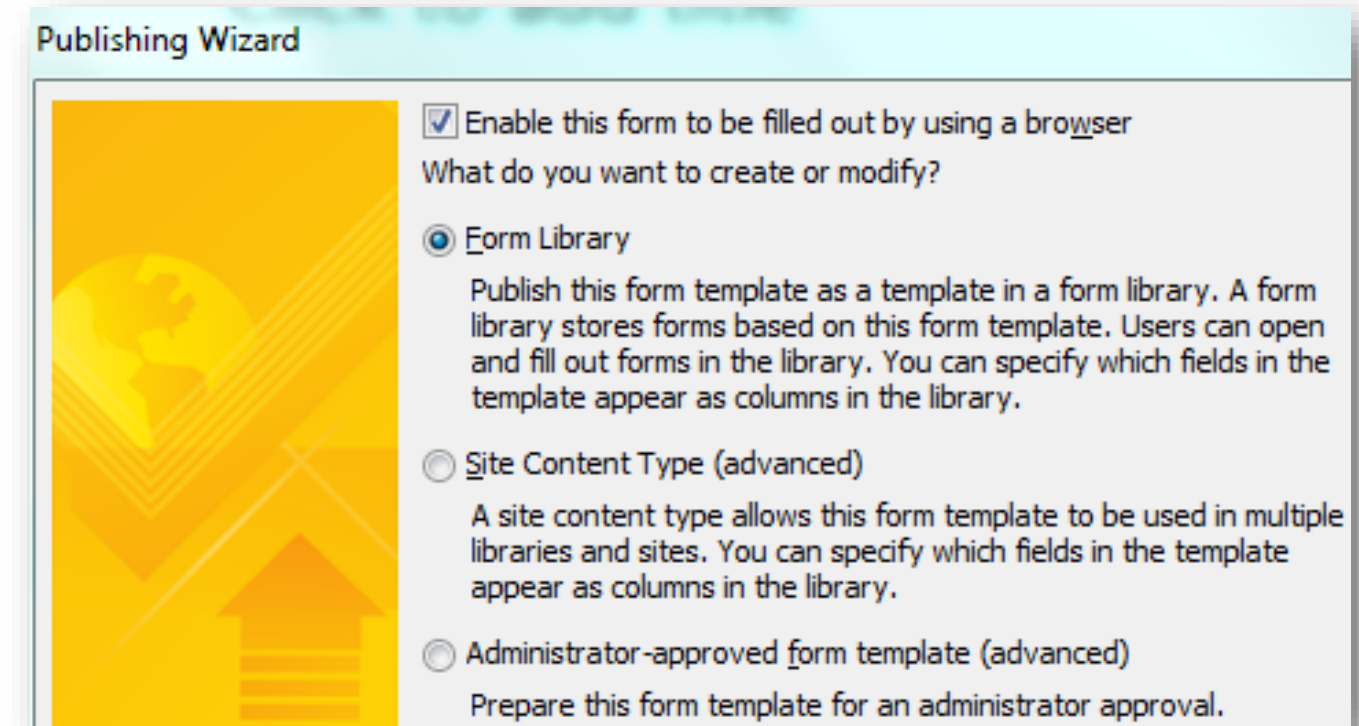
Demo

Advanced Concepts

- Views

- Data Connections

- User Profile Services

- Working with rules

Views in InfoPath

- On the Page Design tab of the ribbon

- Why use them?
  - Create different stages of an approval process
  - Split a large form in to multiple pages, with "Next Page" to move to next view
  - Create a view specifically for printing
  - Create a read-only view for a finalized form

- My typical set of views:
  - New Form
  - Approvals
  - Read Only

- This always will vary from form to form
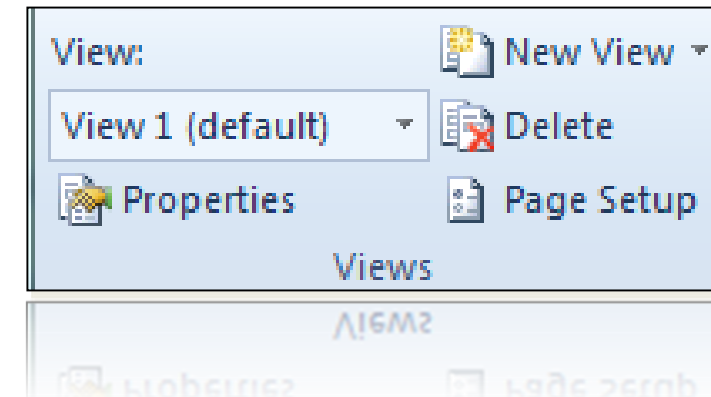
The Data Source

- Data sources can each submit or receive data

- Most commonly – submit to SharePoint

- Receive data from SharePoint Lists
  - For dynamic lookups for drop-downs
  - Get user information from the user profile service
  - Create cascading drop-downs

- "Submit Options" button – not always needed.
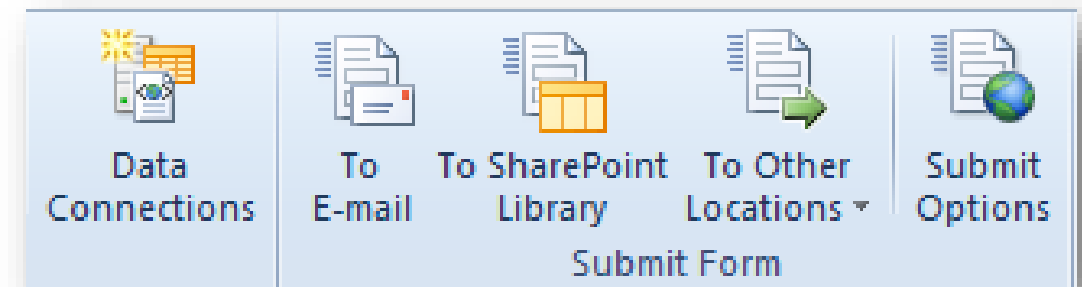
Data Connections

- Submitting Connections
- Receiving Connections
- Querying Connections
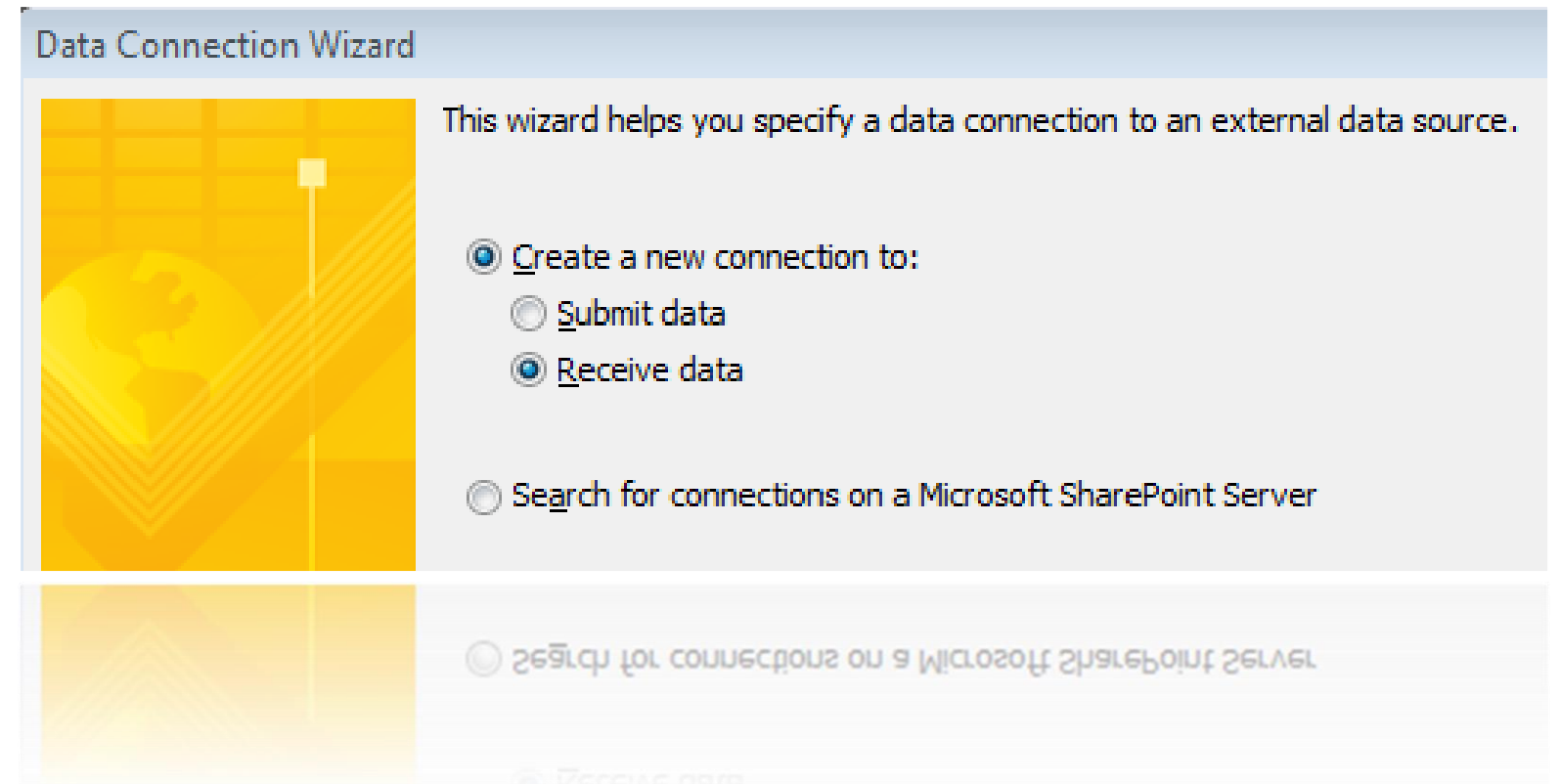
User Profile Service

- User profile properties can be used to populate form data!

- Create data connection to receive data:
  - Receive from web service:
    YourSiteURLHere/_vti_bin/userprofileservice.asmx
  - Pick operation: **GetUserProfileByName**

- Here are some commonly used fields:
  - AccountName (DOMAIN\username),
    FirstName, LastName, PreferredName (First Last)
  - WorkPhone, Office, Department, Title (Job Title),
    Manager (manager's DOMAIN\username),
  - WorkEmail
  - CellPhone

Help Desk Ticket Request

Name: Karen Smith

Department: Sales

Manager: Brian Jones

How Can We Help?
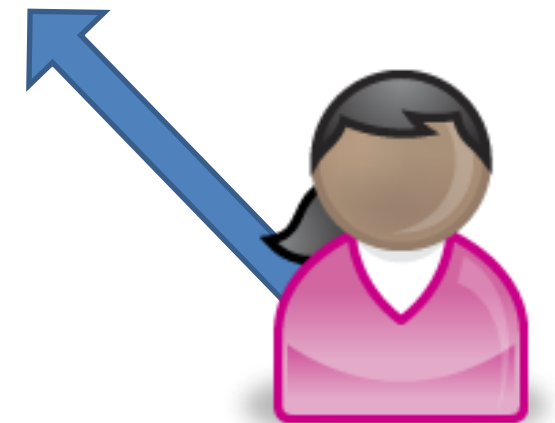
Working with Rules

- Types of rules:
  - Validation
  - Formatting
  - Action
- Consist of conditions and actions
- Different types of rules work on different types of controls
- Create multiple rules on any one control
- Form load rules are for "form open"
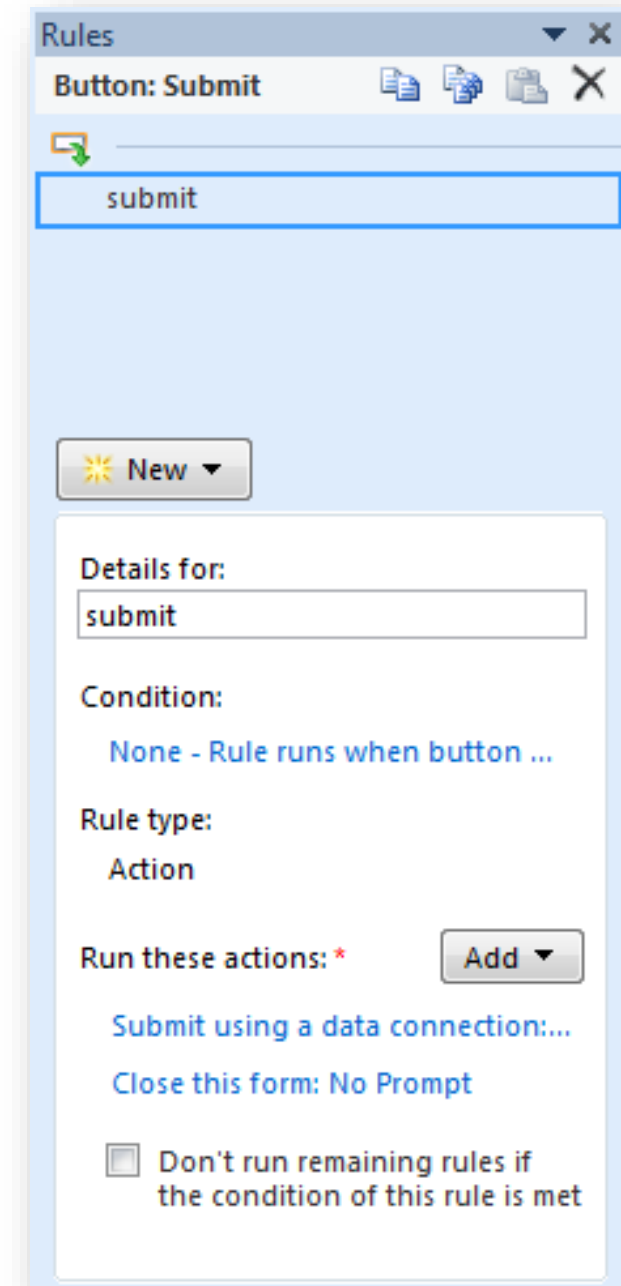
Form Options

- Control which buttons show in the form's toolbar

- Property promotion – you get *more* options for this during the form publishing wizard, not *here.*

- Preview – you can point to an existing form for testing purposes.
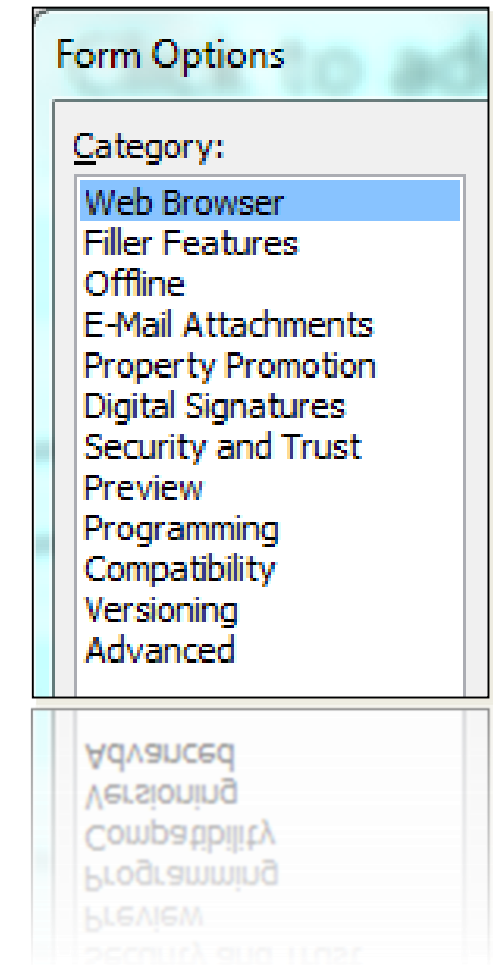
Form Submission Concepts

- The "Submit" data connection

- Using buttons

- Data validation on submit

- New picture buttons in 2010

- Creating the form name syntax to be unique

- Universal Data Connections

- The "default submit"
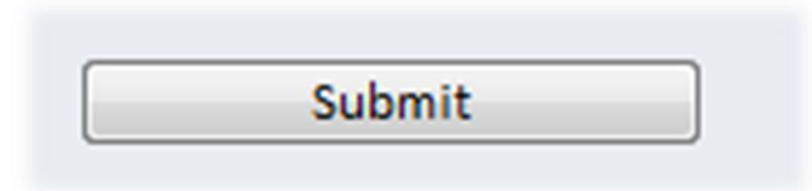
Demo

Workflow

- Workflow concepts
- Types of workflows in 2010
- SharePoint Designer workflows
- Workflow form
- Pros and Cons of approval methods

Introduction - Concepts

- Triggers
  - Manual, on Creation, on Change
- Conditions
  - If WHAT then do something
- Actions
  - This is the something that happens according to the condition
- Steps
  - The order of progression of the workflow
- Impersonation Steps

Types of Workflows in 2010

- SharePoint out-of-box
  - Simplistic

- SharePoint Designer
  - Customizable in easy interface
  - Scalable

- Visual Studio
  - Requires developer resources, highly customizable

- 3rd Party

SharePoint Designer Workflows

- List Workflows

- Reusable Workflows / Workflow Templates

- New Actions:
  - Custom task process
  - Custom approval process
  - Custom feedback process

Our Process Flow

Travel Request Submitted

Manager Approval

Completion

Demo

The User Interface

- What is the user's experience on the site?

- Plan out web parts, such as a button to fill the form out quickly

- Who needs to see the library itself?

- Create an admin page for forms

Define the User Interface

- Remember to define this in requirements gathering

- Arrange web parts on the pages, set up filters

- Set up a form details page as above. (hint: use the query string filter)

- Show users their currently assigned tasks

Form Admin Interface

- Do all users need to see the form library?
  Not usually.

- Who needs to be able to see what?
  - Current user filter web part can be used
  - Show a view of all forms to defined form admins

- Who needs to be notified?
  - Don't over-complicate the workflow just because of simple notification emails.
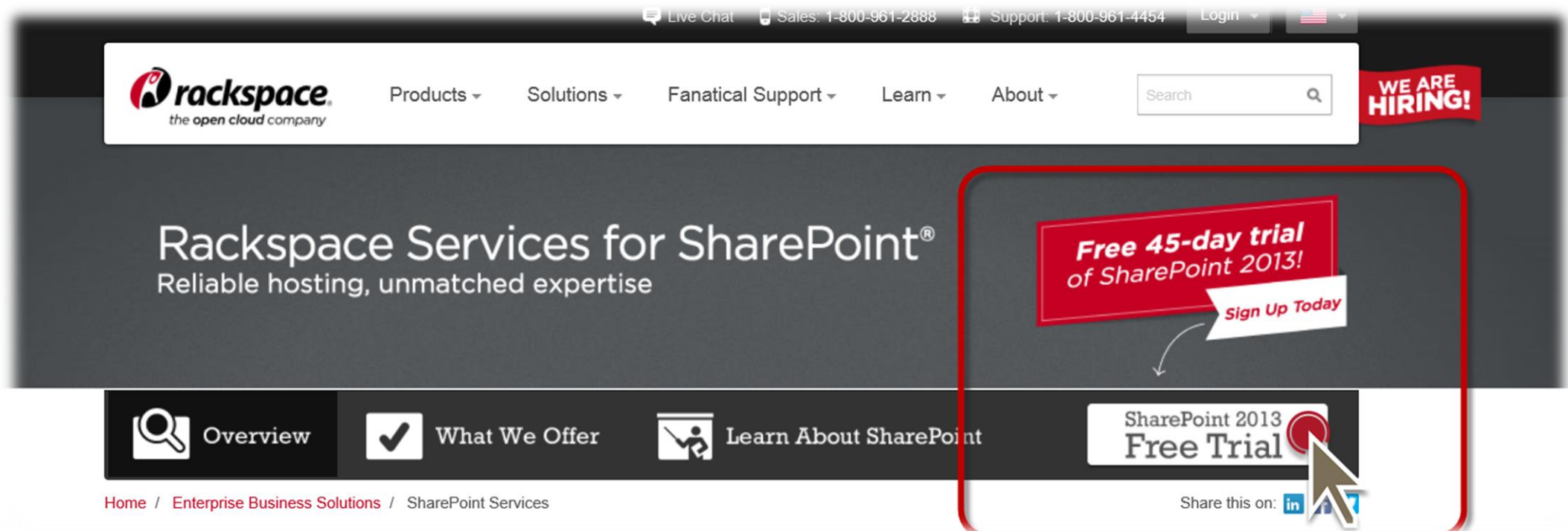 - Utilize alerts and alerts based on views

Demo

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Questions

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