

Publishing InfoPath forms to the Forms Server

Once you have an InfoPath form in hand that you want to go ahead and share out to other people to fill out and you want them to be filling it out through the web, then you just want to go ahead and publish this out to the Forms Server, which comes as part of MOSS Enterprise and also you can buy a Forms Server separately if you wanted to. So I have this form here, let me do a preview of this form. Actually Name being required field, E-mail, Date, Data of Hire, the Department Head is being fetched by a list and here it is, when I click on Sales, IT and HR, it shows me all the different heads of the Department being fetched from the SharePoint list called Department Heads, down below I have Equipment List, the Application Name, and the Notes.

Great, so I want to go ahead and publish this out to the Form Server. I will close the Preview.

Click on Publish Form Template and I want to publish it to the SharePoint Server with or without InfoPath Form Services, and that is the correct option.

Next I will go ahead and take the URL for the Human Resources site that I want to push this template out to → copy to the clipboard and put it down here → click on Next → authenticate as myself, it is telling me here that 'The server is running InfoPath Forms Services, but the compatibility setting for this form template is InfoPath only'. So I need to change the compatibility in the InfoPath form before I start publishing it to the Form Server. Let us cancel this process.

Go to the Design Checker → in Design Checker, click on Change Compatibility Settings and click on 'Design a form template that can be opened in a browser', and also let us give the URL for my server → okay, click OK.

Now it is going to go out and make the validation to make sure things are okay or not. Then if it is not, it is going to show it to me. Here we go. There is one error and the error says, 'Selected Rich Text Formatting and the options are not supported'. So there are some Rich Text Formatting options, when I click on it, it shows me that the options that are conflicting are in the Notes section here. Double click on this Notes section → click on the Display tab → and here it is, it shows me that 'Only full rich text without embedded images is supported

in browser-enabled form templates'. That is the problem, you cannot have embedded images. Alright, so I am going to simply click on the Enable Browser-compatible Settings Only that should take care of everything that I need. If I refresh this list Design Checker, no errors anymore, there are some warnings, but this is just telling me informatively, basically that the objects might not be positioned properly, dialog box validation does not show up when I push it to the Form Server, etc.

Now I want to go back to Design Tasks → click on Publish Form Template, once again pick the same option Publishing to the Form Server → paste in the site's URL → Next. Now that I am ready to publish this out, I want to click on Publish Form Template one more time → select the first option → click on Next → paste in my URL → click Next → and now there are no errors anymore. It is ready to be published to the Form Server and I am going to publish it to the Document Library → Next.

Let us create a New Document Library and I am going to name this Resource Provisioning, so Prov, and the Description, let us go back, Description I can type in, 'Fill out this form to request provisioning of items' and that tells every employee that they need to fill this out. Next the second last step before publishing is actually promoting fields. This is an optional step, but promoting fields that appear here into the Document Library, I can take each of these fields and make them into columns in the Document Library → so I can click on Add → let us choose the first one, Name, → Add again → click on Date → let us choose E-mail, so I am taking these fields and I am going to be promoting them into a metadata in the Document Library → click on Next → Publish. Okay, so it is done.

I am going to click on Open this Document Library and click on Close and automatically it is going to navigate me to that Document Library called Resource Provisioning, Resource Prov to be short. As you can see that I got Name, Date and E-mail, three fields that actually propagated from my form into metadata in this library, if I, let me go ahead and first click and shut this form off, the InfoPath Form, now looking at this Library, if I click on New, it is actually going to try to open it, as you can see, in the InfoPath client and it does that because that is the preference to open the Forms up in InfoPath client because that is a more richer platform. If I want this to be a unique

experience for all Users and I wanted it to be opened up in the browser all the time, then I need to make a setting and that is in Settings → Form Library Settings → Advanced Settings → and Display as a Web Page for opening browser-enabled documents → click on OK. Go back to the library, now when I click on New, it is actually loading the Form in the browser, okay so here is my form. As you can see that all the fields are being pulled and they are shown just like they would be in the InfoPath client. So I can fill out some of these fields, so let us do that. Ben, Date of Hire, let us make that 10th, Pick a Department Head, pick some Equipment here, no Applications, no Notes, let me just go ahead and Save this Form, click on Save and here is where I can Save the form with any name, let us say Asif's Request, okay, it saves the form, but it still keeps me in the same window. I need to go down and actually click on Close to get out of here.

Now back at my Library, and I can see Asif's request document, I can see it is modified by Ben Burton who is a person who is signed in right now. And the Name, Date, and E-mail, all these three fields actually got propagated up from the Form and the actual values appear in the Library. Now you have probably noticed that when I am saving the Form, first of all I am given the opportunity to name the Form, which is good, but at the same time you sometimes do not want Users to come up with fancy names and maybe even overwrite their existing Form, so sometimes what you want to do is actually give them a Submit option instead of Save option, and then automatically everything should be taken care of like saving the file as a particular name and throwing it in the Forms Library, and also closing the Form and bringing them back to this view, to the Form Library.

Well that is how fairly easy to accomplish and to do that what you want to do is go back to the Form, so I am going to right click on the Resource Provisioning Form → click on Design → and in here I am going to click on Tools and Submit Options, I want to enable the Submit Options, let us click on 'Allow users to submit this form' and change this destination to a Document Library. I need to add a new connection to submit a document library, so I will click on Add, and I want to take the pointer to this library and put that URL in here. Okay, so that is the document library that I want to submit to. Also for the file name, as I mentioned before, I can make that a dynamic name that gets generated automatically and put out there. So I am going to click on the Function key and say in here 'Insert function', let

us use the concatenation function, so the first argument here, the first option, the parameter here when I double click on it, I am going to select the person's name. The second parameter here I am going to delete this altogether and actually put in quotes, so double quotes and then a single quote and then s and then request and then hyphen double quotation ("s request-"), so let us say if Ben actually fills the form, so his name, then apostrophe s space request and then a dash and for the last field, I am going to make this the unique identifier, so I will click on, actually I will go ahead and delete this field, I do not need that and instead I am going to put a function here and that function is going to be the Now function. The Now function brings the current system Date and Time and the ISO format, meaning it is up to the millisecond and almost impossible to have another file to be with the exact file name with exact date, time and millisecond, so I am going to keep that, click on OK. So, it is going to be Ben's request- and then the actual date, time and make a unique record. Just click on OK. The 'Allow overwrite if file exists' does not really matter to click that or not because this file should never exist. Every time it is submitted, it is always a new name for the file because it has a Now parameter, so just click on Next. The name for this data connection is going to be Main Submit, that is fine, click on Finish. And click on the Advanced button here and say that 'After the form has been submitted, go ahead and Close the form', do not leave it open; otherwise your Users will get confused, so it is better to close the form, click on OK.

So you configured the Submit Options, you also want to go to the Tools and Form options to take out some of these fields that you do not want the Users to see, so you do not want them to, for example, see the Save, or the Save As button, or even the Close button, and the Views button; Print View, let us leave it like that so that they can have a different Print View if one has been designed for them; I will uncheck the Show Toolbar at the top of the form and just have the Toolbar show at the bottom of the form like a regular generic form, now click on OK.

And then let us resubmit this, republish this to the library, Publish Form Template → Next, and it already has a parameter of my site, so I will click on Next → next here and it knows that the last one that we put out there is Resource Prov library, so it is going to try to update that, which is good → Next, the three fields that I propagated are still out there, I will leave

it at that → Next, now it is telling me that you are publishing your form again, you are updating the form, that means that if somebody is filling out the form right now, their session will time out. So, you might want to notify your Users about that that an upgrade to the form is coming → Publish

Once again, let us click on the Open this Document Library, so it can navigate us to it. Alright, here is my library.

Now, I will follow the same process by clicking on New to open up a new form, let us put in Alan, Date of Hire is going to be the 4th, Department Head, Sales Department, Desktop and as you can see that the top Toolbar is gone completely, there is no top toolbar, and at the bottom, what you see is the Submit button, the Toolbar and the Print View button, there is no other buttons here anymore. So, I will click on Submit. The form was submitted successfully. It did not ask me for the Name of the form. Click on OK, takes me back to the Resource Provisioning Library. It is great and it shows me the record. Here is the record, Alan's request-and the Date/Time format in ISO format. It shows me who modified this form, who created this form in this case, and the Name, Date, and E-mail coming from the form being propagated.

So in this demo, you saw how you can Publish a form to the Forms Library and then configure the parameters in the Form Library and also actually in the form, the Submit parameters to make it a very seamless and intuitive natured form process. Now here the next step would be, and that could be covered in a different video Screencast, but the next step would be to take these fields that you have and maybe write a workflow around these fields, so some other processes happen after this is done.