

# **Creating SharePoint List Forms – When to use InfoPath 2010 or SharePoint Designer 2010**

Presented by:

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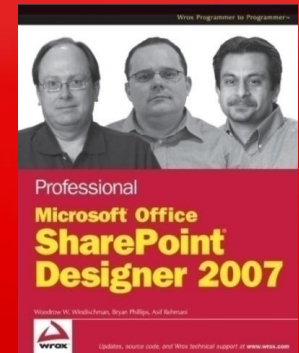
# Who am I?

asif@sharepointelearning.com

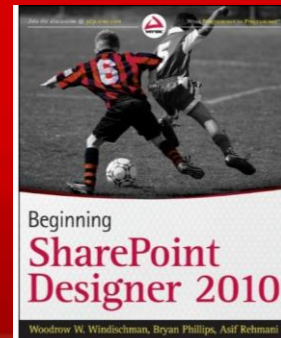


Current Video Count: 202

- ▶ Microsoft Office SharePoint Server MVP, MCT
- ▶ Principal contributor at **SharePoint-Videos.com**
  - Videos on SharePoint, SharePoint Designer and InfoPath
- ▶ SharePoint 2010 Training



- ▶ Co-Author of the book Professional SharePoint Designer 2007 and the upcoming book Beginning SharePoint Designer 2010



- ▶ Speaker at various conferences
  - Microsoft TechEd, SharePoint Conference, SharePoint Connections, Best Practices Conference etc.

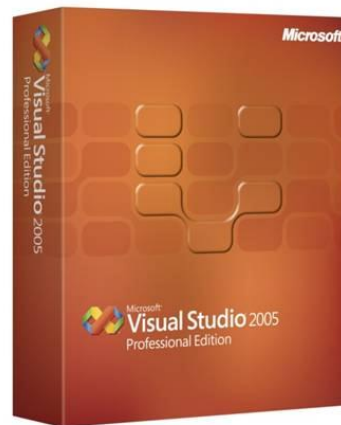
# Information flow of the points in the presentation



# A Look Back

## Customizing List Form Pages in SharePoint 2007

- ▶ SharePoint Designer 2007
- ▶ Visual Studio



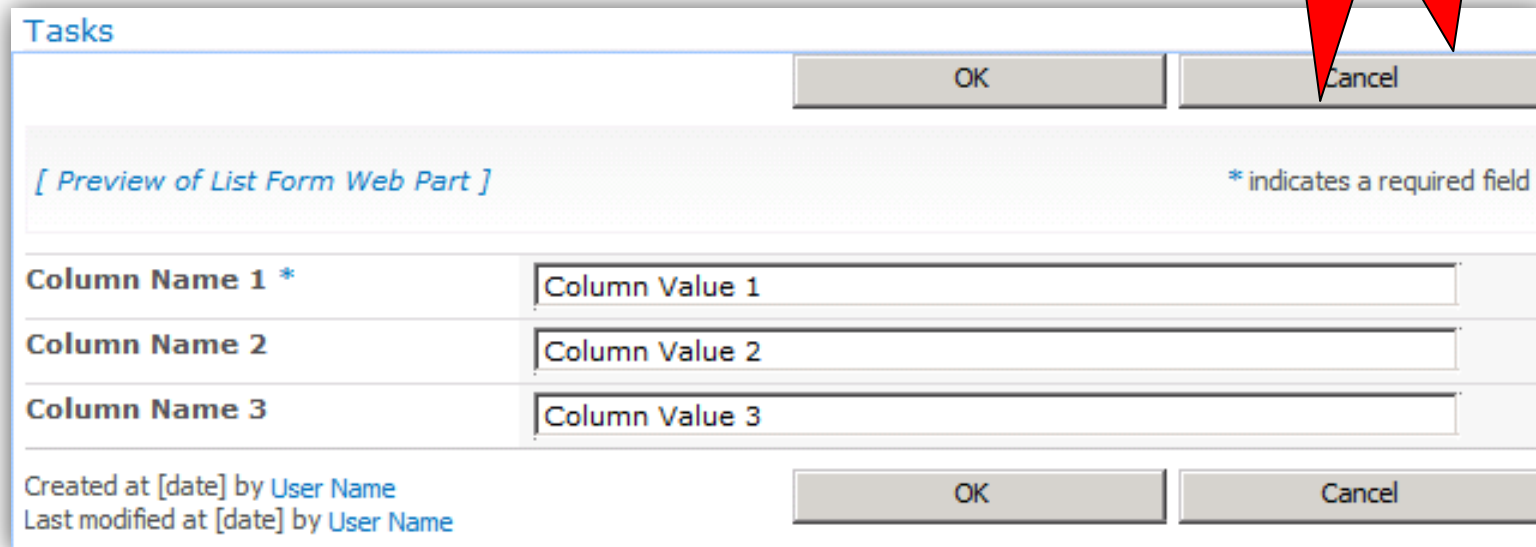
# SharePoint List Forms – OOB

Past and Present

- ▶ The out-of-box SharePoint list made using CAML



**Worst Practice:**  
Trying to modify these forms



Tasks

OK Cancel

[ Preview of List Form Web Part ] \* indicates a required field

Column Name 1 *	Column Value 1
Column Name 2	Column Value 2
Column Name 3	Column Value 3

Created at [date] by User Name  
Last modified at [date] by User Name

OK Cancel

# Creation of SP List Form

## SharePoint Designer 2010

**Best Practice:**  
Create new  
SharePoint List form

The screenshot displays the SharePoint Designer 2010 interface. On the left, the 'Forms' task pane is open, showing a list of forms: DispForm.aspx (Display, Yes), EditForm.aspx (Edit, Yes), and NewForm.aspx (New, Yes). A blue starburst callout points to the 'New...' button in the task pane. A green arrow points from the 'New...' button to the 'NewForm.aspx' file in the list. The main window shows a form being edited, with fields for Login ID, Employee ID, Contact ID, and Manager ID. The 'Common FormField Tasks' pane is open, showing the 'List Form Field' option selected for the Employee ID field.

File Name	Type	Default
DispForm.aspx	Display	Yes
EditForm.aspx	Edit	Yes
NewForm.aspx	New	Yes

Field Name	Value
Login ID	adventure-works\yuy1
Employee ID	1,234.56
Contact ID	1,234.56
Manager ID	ManagerID field value.

**Common FormField Tasks**

Data Field: EmployeeID

Format as: List Form Field

- Text
- Rich Text
- Number
- Currency
- Label
- List Form Field

# Demo

# The Awesomeness of InfoPath



Form Designer & Filler

• Browser and Client forms



Visual Layout



Form Logic



Data Connection



# SharePoint-InfoPath touch points

## ▶ Create Form Library forms

- ▶ License needed: SharePoint Foundation

## ▶ Modify Workflow forms

- License needed: SharePoint Server Standard

## ▶ Create SharePoint List forms

- License needed: SharePoint Server Enterprise



**Best Practice:**  
Understand Licensing  
for each option before  
using it 😊

# Modifying List Forms using InfoPath 2010

The screenshot displays the Microsoft InfoPath 2010 interface. The ribbon is set to 'Table Tools' with the 'Layout' tab selected. The main workspace shows a form titled '(Design) Form13 - Microsoft InfoPath' with a table containing the following fields:

<b>Title</b>	<input type="text"/>
<b>Attachments</b>	<input type="text" value="Click here to attach a file"/>
<b>Predecessors</b>	<input type="text"/>
<b>Priority</b>	<input type="text"/>
<b>Status</b>	<input type="text"/>
<b>% Complete</b>	<input type="text"/>
<b>Assigned To</b>	<input type="text" value="&lt;-mail addresses&gt;"/>
<b>Description</b>	<input type="text"/>
<b>Start Date</b>	<input type="text"/>
<b>Due Date</b>	<input type="text"/>

The 'Fields' task pane on the right is open, showing a list of available fields to be added to the form:

- ID
- Title \*
- Created By
- Modified By
- Modified
- Created
- Attachments
- Predecessors
- Priority
- Status
- % Complete
- Assigned To
- Description \*
- Start Date
- Due Date

# InfoPath Form Web Part

## ▶ Deploy the form on any page

The screenshot shows a SharePoint page with the following elements:

- Ribbon:** Site Actions, Forms, Editing Tools (Format Text, Insert), Web Part Tools (Options). The user is SPEL\Administrator.
- Navigation Pane:** Recently Modified, Libraries (Site Pages, Shared Documents, Expense Reports), Lists (Calendar, Tasks), Discussions (Team Discussion), Recycle Bin, All Site Content.
- InfoPath Form Web Part:** A form titled "SharePoint-Videos" (A division of SharePoint-eLearning.com) with the following fields:
  - Title:** Text input field with a red asterisk.
  - Attachments:** "@ Click here to attach a file" button.
  - Predecessors:** List of tasks with checkboxes:
    - Please approve expense
    - Please approve expense
    - task 1
  - Priority:** (2) Normal (dropdown menu)
  - Status:** Not Started (dropdown menu)
  - % Complete:** Text input field.
  - Assigned To:** Text input field with user selection icons.
  - Description:** Text input field with a red asterisk.

# Demo

# SPD vs InfoPath for form customization

## Tradeoffs

### SharePoint Designer

- ▶ Requires some technical acumen to create forms
- ▶ Licensing: None! Both SPD and SharePoint Foundation are free
- ▶ .aspx forms created

### InfoPath

- ▶ Information Workers and Business Analysts can easily create forms
- ▶ Licensing: SharePoint Server Enterprise and InfoPath client app
- ▶ .ifs forms created



**Best Practice:**  
If InfoPath is a choice  
Use it!

# Call to Action

- Watch the free videos on <http://www.sharepoint-videos.com>
- Connect with me –  
Let us know if we can help with your  
Training or Consulting needs  
[asif@sharepointelearning.com](mailto:asif@sharepointelearning.com)  
twitter: [asifrehmani](#)

Please be sure to fill out your  
session evaluation!