### **oneomatics** efficiency by design

### TOM VAN GAEVER

### CREATE INFOPATH FORM WITH LOOKUP FUNCTIONALITY TO SHAREPOINT LIST

TUTORIAL

VERSION 1.0



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#### **1** INTRODUCTION

This is a guide for setting up an InfoPath form that will fill in other textboxes with data retrieved from a SharePoint list or library, this form will be published to a SharePoint form library in order to provide end users an easy way to fill in a form. This solution is created by using InfoPath 2007 and MOSS 2007. 3|11

This is a document created in order to help other SharePoint developers while they are creating InfoPath forms that need the same functionality.

#### 2 AUTO FILL IN INFOPATH FORMULIER WITH ID FROM SHAREPOINT LIST

Create the controls in your designer and place them on the form

Loonnr:	
Afdelings Nummer:	Naam:
Afdeling:	Voomaam:

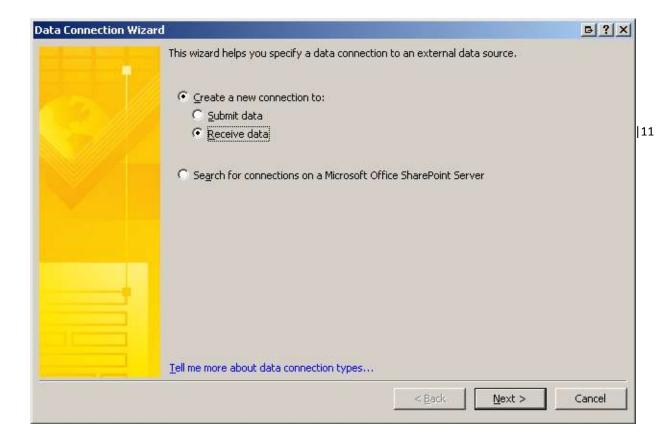
#### 3 ADD A DATA CONNECTION THAT POINTS TO YOUR SHAREPOINT LIST

Show details
Actions
Add a Field or Group
Manage Data Connections

Click on the Manage Data Connections in the data source screen in the lower right of your screen.

Select create a new connection and check receive data

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Data Connection Wizard	d	B?X
	Select the source of your data. From where do you want to receive your data?	
	< <u>B</u> ack <u>N</u> ext >	Cancel

Select a SharePoint library or list and press Next.

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Data Connection Wiza	d B?×
	SharePoint site details Use these options to specify the SharePoint site from which you receive data. Enter the location of the SharePoint site you want to use as your data connection or the complete URL to your SharePoint list.
	Examples: http://yourserver/yoursite/ or http://yourserver/yoursite/yourlist/Forms/AllItems.aspx
	< <u>B</u> ack Cancel

Enter the URL of the SharePoint list you want to use in order to retrieve data.

Data Connection Wizard		B	? ×
		I has the following lists and libraries for providing the XM Description of list or library:	
		< <u>B</u> ack <u>M</u> ext > Cano	el

As you can see, InfoPath retrieves automatically the available lists and libraries.



Data Connection Wiz	ard	₽?×
	The SharePoint list has the following fields that you can select from. Select fields: Familienaam Yoornaam Afdelingsnr Afdeling D Content_Type (Content Type) Modified Created Created_By (Created By) Modified_By (Modified By) Yersion	11
	Include data for the active form only	
	< <u>B</u> ack <u>N</u> ext >	Cancel

Select the SharePoint list you want to use to retrieve the information.

Select the fields you want to use in your InfoPath form

Data Connection Wizard	B?×
	When a query occurs while working with the form in InfoPath, the returned data is stored locally for use in Offline Mode. InfoPath can connect to this data source now and store the results in the form template for offline use. This will enable users to access the data if they are working with the form for the first time and there is no previously stored data available. Store a gopy of the data in the form template
	< Back     Next >     Cancel

We want to retrieve the latest updates to our SharePoint list, so we will not store a copy of the current list.

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 Data Connection Wizard
 Enter a name for this data connection:

 Personeelsbestand
 // Automatically retrieve data when form is opened

 Note: You can also add a Refresh button to your form template or template part, which will retrieve the data.
 Summary

 Type: Retrieve data
 SharePoint site: http://edith/selfservice/

 List: Personeelsbestand

 Summary

 Type: Retrieve data

 SharePoint site: http://edith/selfservice/

 List: Personeelsbestand

Give your data connection a suitable name and Click <u>F</u>inish.

Now you have a secondary data connection.

Data Connections	₽?×
Data connections for the form template:	
Personeelsbestand	<u>A</u> dd <u>M</u> odify <u>R</u> emove
Details Name: Personeelsbestand Type: Retrieve data SharePoint site: http://edith/selfservice/ Data source type: Secondary data source Data retrieved: Every time form is opened	
	Close

This connection will be used to retrieve items and put them in our InfoPath Textboxes.



#### 4 ADD A RULE TO FILL IN THE OTHER CONTROLS

Right Click the control where the users wil be entering the ID.

Loonnr:			
	-	9	Cha <u>n</u> ge Binding
Afdelings Nummer	:	¥	Cu <u>t</u>
	[	Þ	⊆ору
Afdeling:		3	Paste
	5	五	Borders and Shading
			Conditional For <u>m</u> atting
	I.	?	Data <u>V</u> alidation
			<u>R</u> ules
			Programming
			Logic Inspector
			Change To
			Text Box Properties

In the *Data* tab click the *Rules…* button and add a new Rule.

Text Box Properties B?X	
Data Display Size Advanced Browser forms	
Binding	
Field name: Loonnr.	
Data type: Text (string) Format	
Default Value	
Value:	
Example: Sample Text	
Update this value when the result of the formula is recalculated.	
Validation and Rules	
Cannot be blank	
Data Validation Use data validation to display errors when users enter invalid data.	
Rules Rules	B?×
Use <u>r</u> ules to display messages, set values, and apply other actions based on con form.	ditions in the
Rule (applied in the order shown)	A <u>d</u> d
	Modify
	Remove
	Move <u>U</u> p
	Move Do <u>w</u> n
	Cancel

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Press condition and select the Identifier from your secondary connection that needs to be the same

Condition				₽?×
Apply the rule when	this condition is true:			
Loonnr.	is equal to	Loonnr	▼ <u>A</u> nd »	Delete
		[	ОК	Cancel  1

Action	<u> </u>
<u>A</u> ction:	
<i>∋f</i> ∡ Set a field's value	•
Naam	ťa
<u>V</u> alue:	
	f.c.
	OK Cancel

Add an action, select in the Field the correct control where the text from the SharePoint list needs to be entered. Next in value insert field or group, select your secondary data source and select the corresponding field from SharePoint.

Insert Formula		<u> </u>
To add a field or group to the add a standard function, clicl		ield or Group. To
Eormula:		
Insert Field or Group	Insert Function	Verify Formula
Edit XPath (advanced)		
	OK	Cancel



Select a Field or Group			<u>₿?</u> ×	1
<u>D</u> ata source:				
Main			•	
<ul> <li>□ ➢</li> <li>□ AfdelingsNummer*</li> <li>□ Afdeling*</li> <li>□ Loonnr.*</li> <li>□ Naam*</li> <li>□ Voornaam*</li> <li>□ ○ Periode</li> <li>□ ○ Locatie</li> </ul>	K			
Eilter Data OK		Cance		6
Insert Formula				<u>₿?×</u>
To add a field or group to the f add a standard function, click I <u>F</u> ormula: <u>Naam</u>	ormula, ci insert Fun	ick Insert F ction.	iela or Gra	oup. 10
Insert Field or Group	Insert F <u>u</u> r	nction	<u>V</u> erify F	Formula
🔲 Edit XPath (advanced)				
		ОК		ancel
Action			₽?	
<u>A</u> ction:	_			
- =ƒ∡ Set a field's value				•
Eield:				_
Naam				20
Yalue:			_	
Naam				fæ
				_
	0		Cancel	

Repeat this for every field in your form

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Rule	<u> </u>
Name:	
set values	
Condition:	
Loonnr. = Loonnr	Set $\subseteq$ ondition
Actions (run in the order shown):	
=≸x Set a field's value: Naam = @Familienaam	Add Action
=🞜 Set a field's value: @Voornaam = @Voornaam	
= $\int_{\mathcal{X}}$ Set a field's value: Afdeling = @Afdeling	<u>M</u> odify
=∮x Set a field's value: AfdelingsNummer = @Afdelingsnr	Remove
	Move Up
	Move Do <u>w</u> n
Stop processing rules when this rule finishes	
COK	Cancel

#### 5 FINISHED

Press **ctrl + shift + b** in order to preview the form.

If everything has been configured correctly the 4 other textboxes will be filled in automatically when you enter the ID in the control where you have added the rule.

Success!

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