neomatics
efficiency by design

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CREATE INFOPATH FORM WITH LOOKUP FUNCTIONALITY TO SHAREPOINT LIST

TUTORIAL

VERSION 1.0

CONTENT

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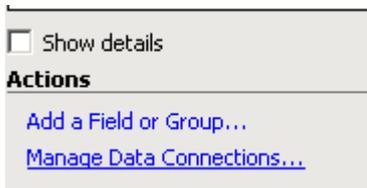
This is a document created in order to help other SharePoint developers while they are creating InfoPath forms that need the same functionality.

2 AUTO FILL IN INFOPATH FORMULIER WITH ID FROM SHAREPOINT LIST

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

3 ADD A DATA CONNECTION THAT POINTS TO YOUR SHAREPOINT LIST
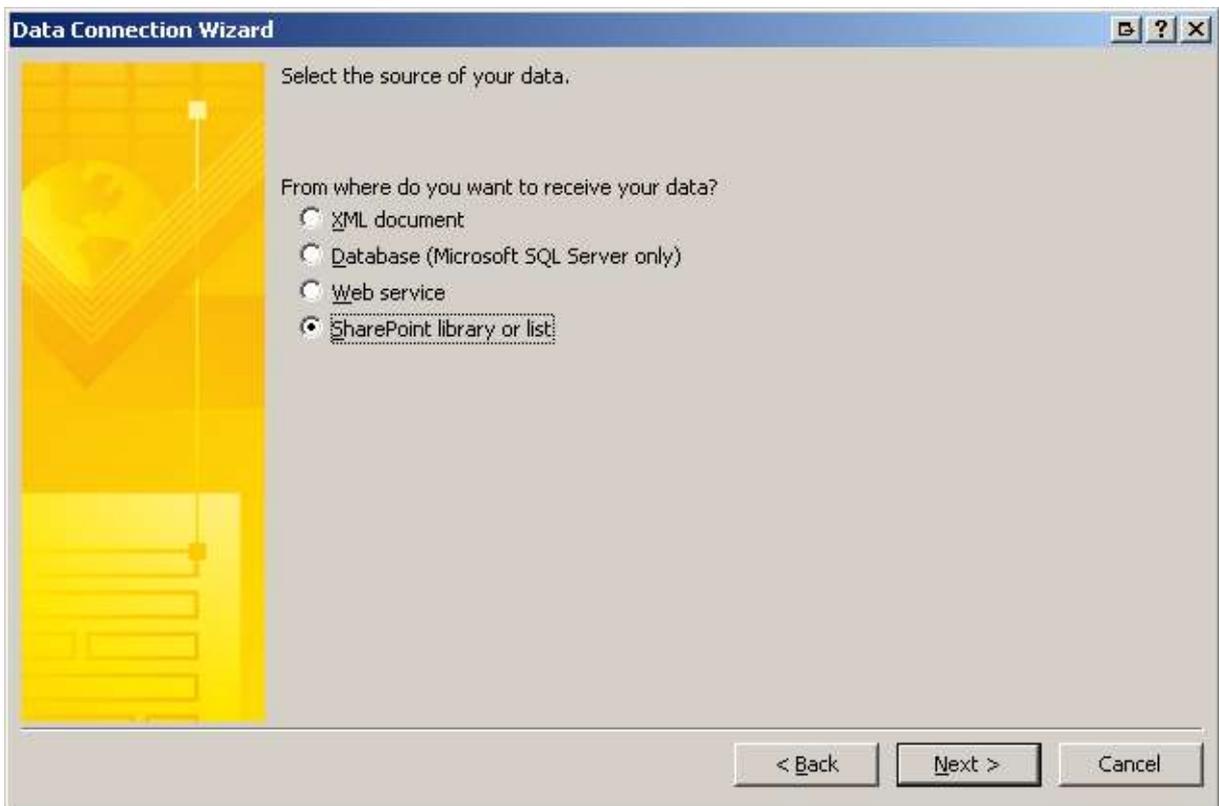

Click on the Manage Data Connections in the data source screen in the lower right of your screen.
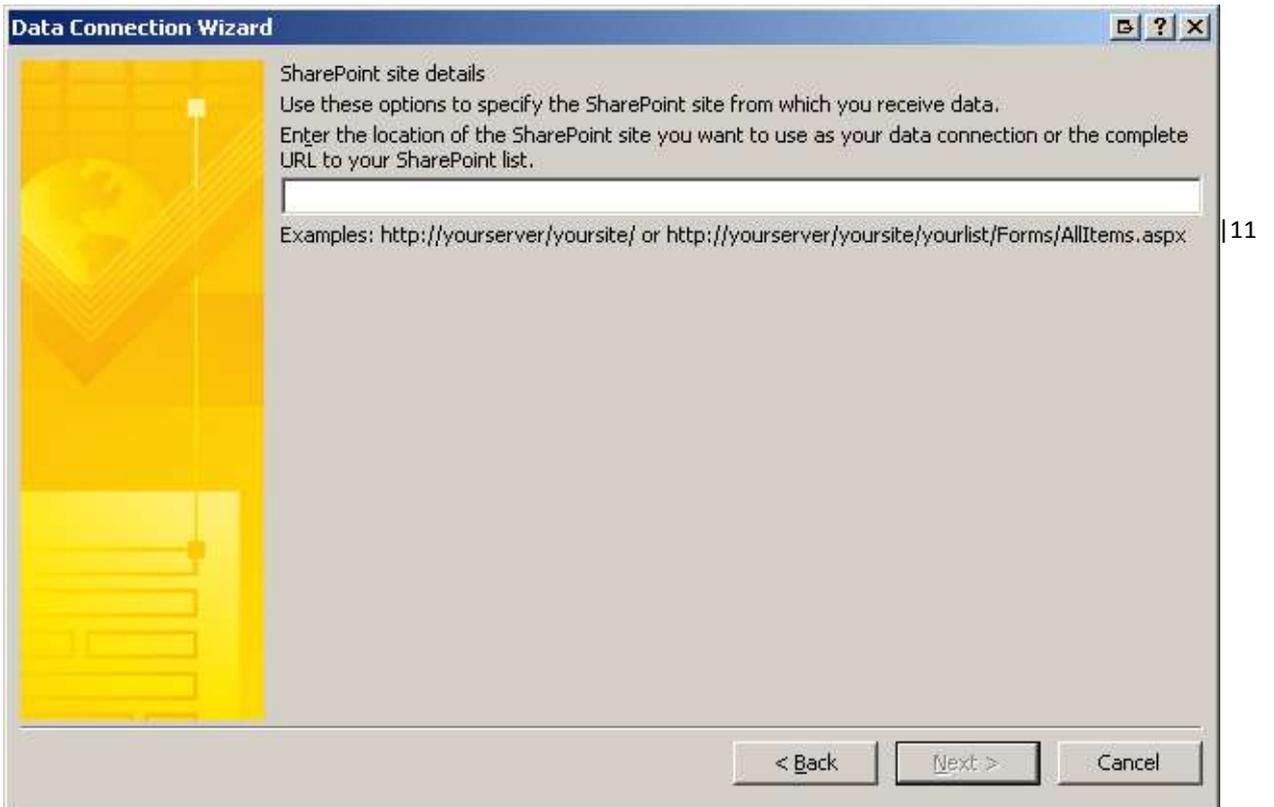
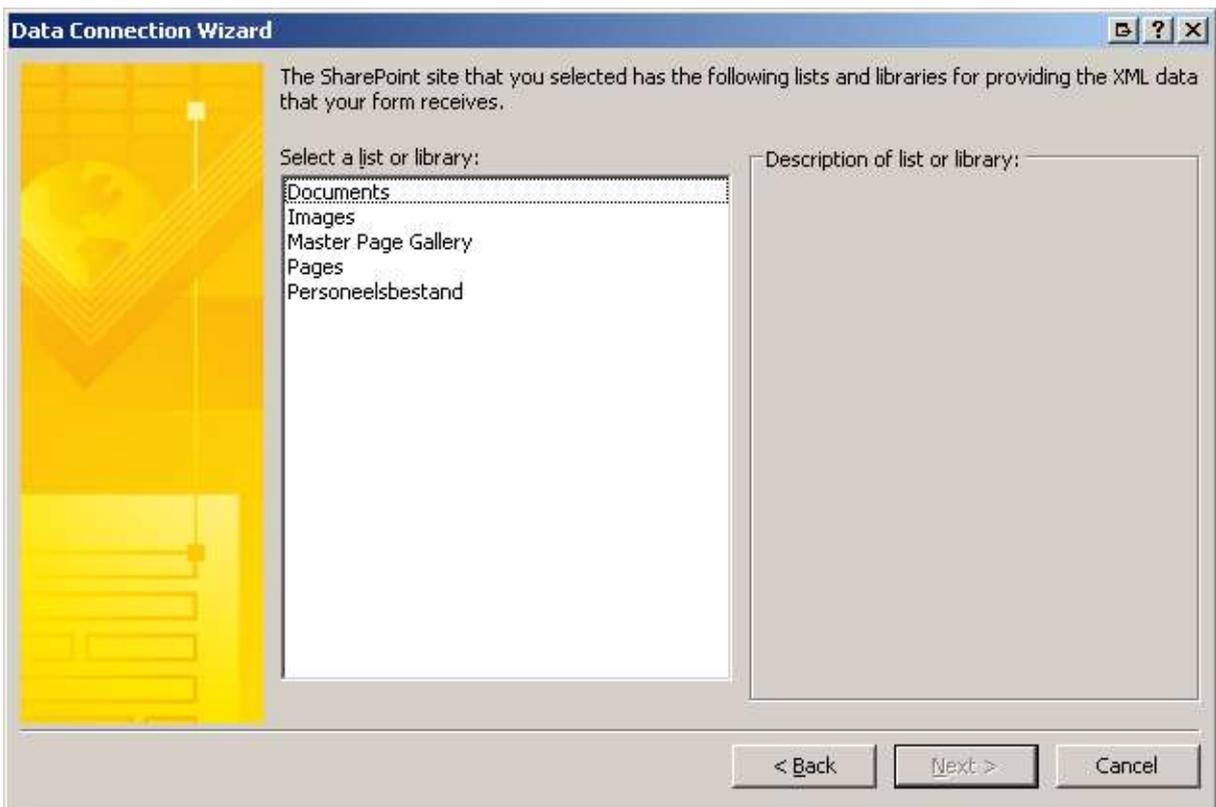Select *create a new connection* and check *receive data*

Select a *SharePoint library or list* and press <u>N</u>ext.

Data Connection Wizard

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

< Back   Next >   Cancel

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

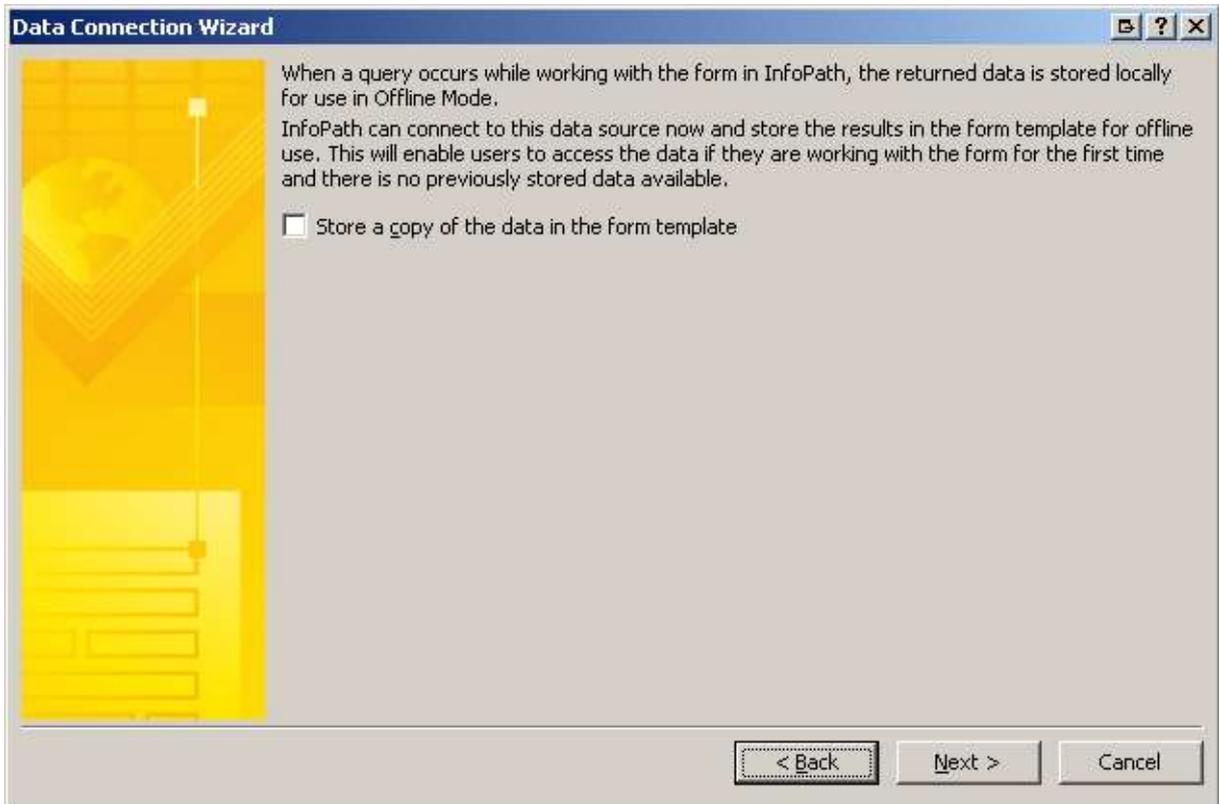As you can see, InfoPath retrieves automatically the available lists and libraries.

Data Connection Wizard

The SharePoint site that you selected has the following lists and libraries for providing the XML data that your form receives.

Select a list or library:

Documents
Images
Master Page Gallery
Pages
Personeelsbestand

Description of list or library:

< Back   Next >   Cancel

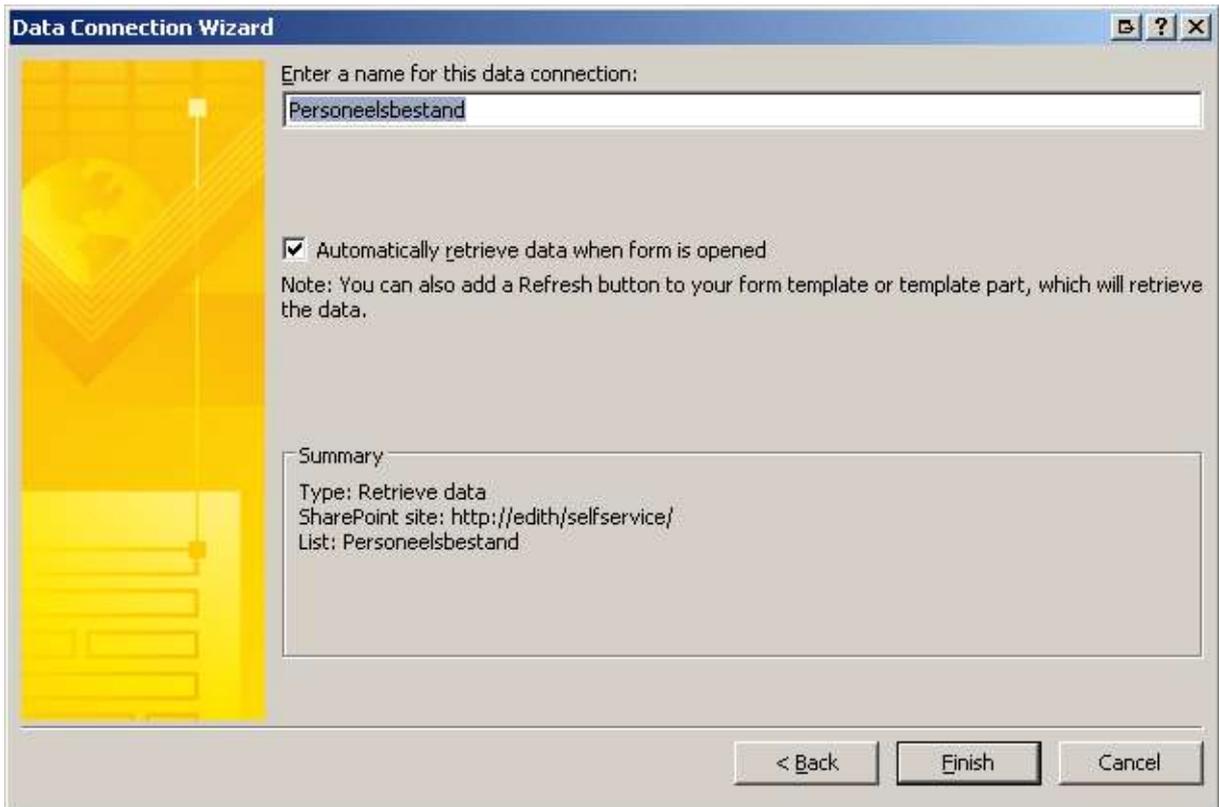Select the SharePoint list you want to use to retrieve the information.

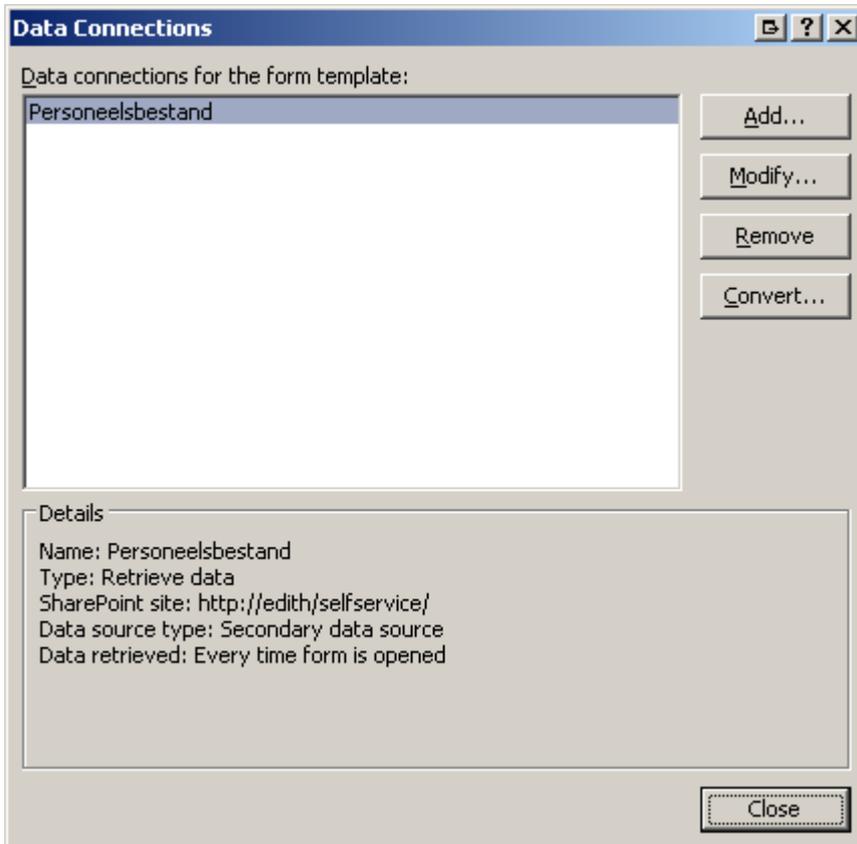Select the fields you want to use in your InfoPath form

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

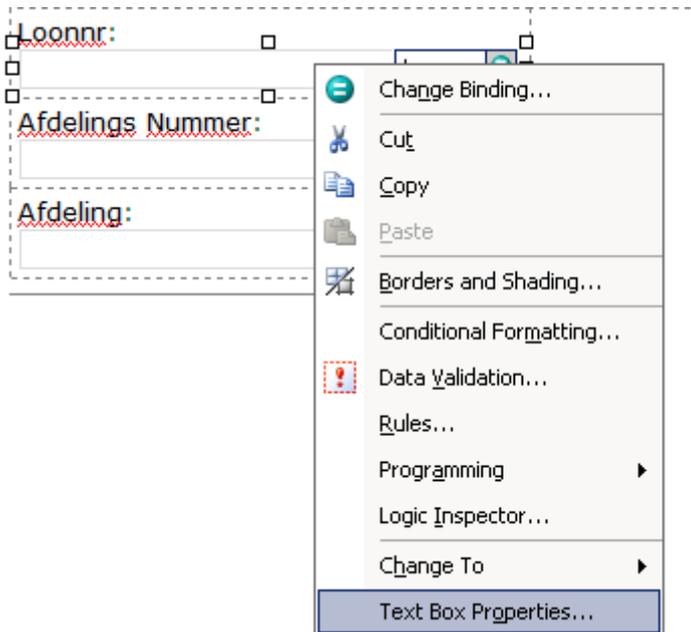Give your data connection a suitable name and Click Finish.

Now you have a secondary data connection.

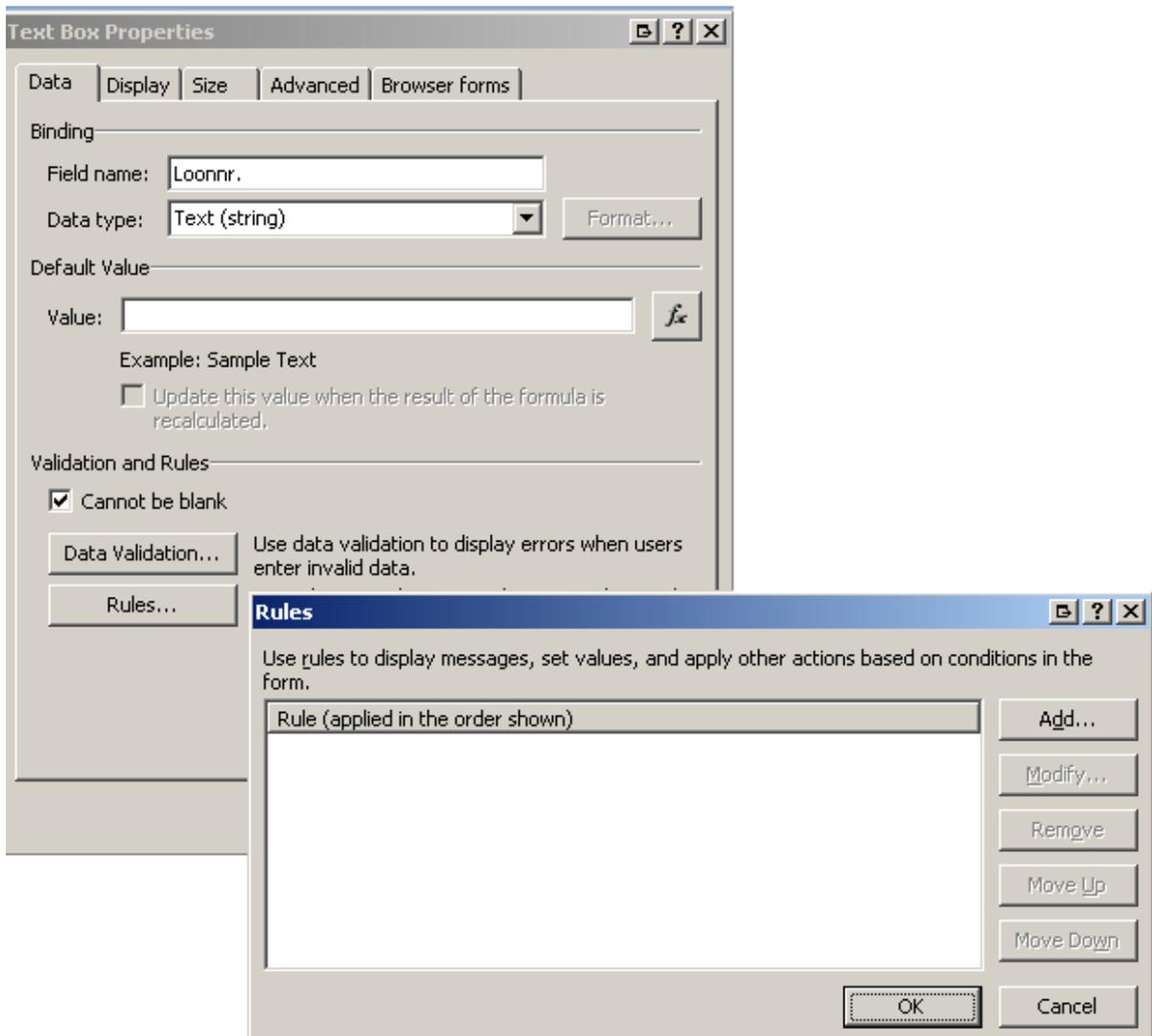This connection will be used to retrieve items and put them in our InfoPath Textboxes.

4 ADD A RULE TO FILL IN THE OTHER CONTROLS

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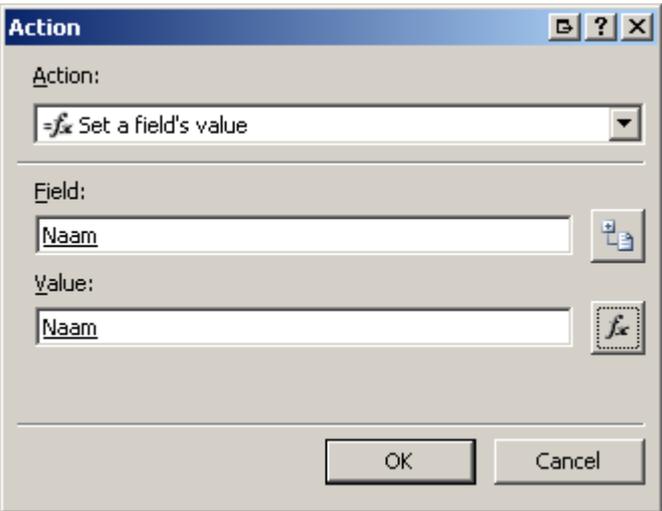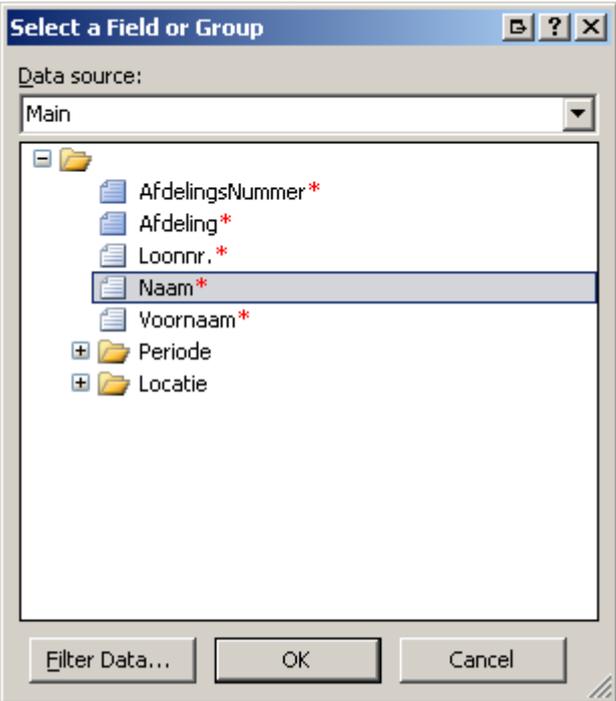

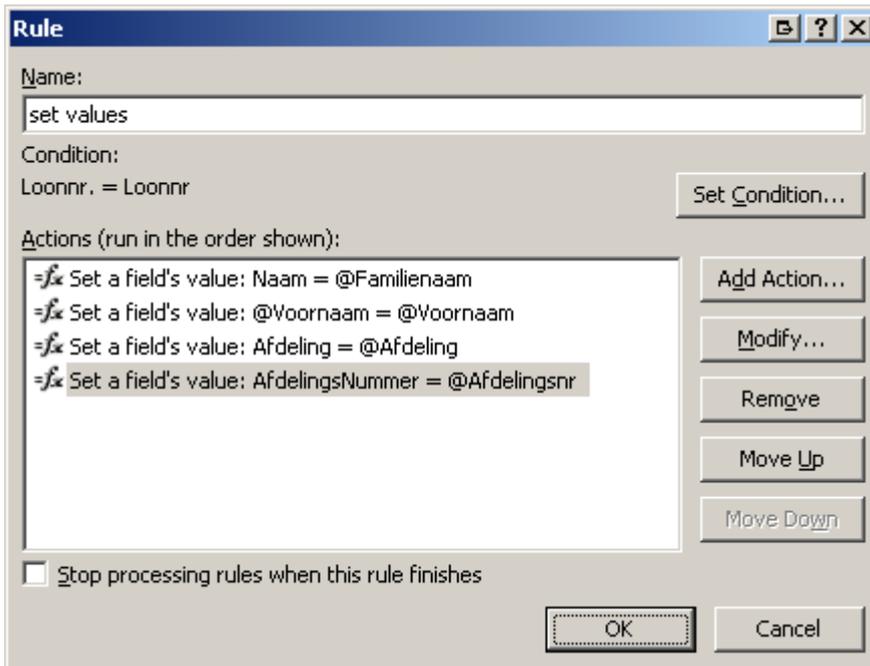In the *Data* tab click the *Rules…* button and add a new Rule.

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

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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.

Repeat this for every field in your form

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!