

The logo features a stylized red circular graphic with a brushstroke effect, partially overlapping the text. The text is in a bold, blue, sans-serif font with a slight drop shadow.

SharePoint Saturday Indianapolis

Streamlining Business Processes
with InfoPath and SharePoint

Rob Wilson, MCT, MCTS, [Keller Schroeder](#)

- Introduction to InfoPath
- Business problems InfoPath addresses
- Some common use cases
- Introduction to SharePoint Designer and Workflows
- Anatomy of a streamlined solution
- Some complex use cases
- Tips for improving your user experience
- Enhancements in the 2010 product stack

Introducing InfoPath

- Electronic forms
- Better than Adobe, xforms, others
- Product Sheet:
 - Gather information efficiently and reliably
 - Centralize forms management and control
 - Streamline forms-driven business processes

EXPENSE REPORT

Report Date: Expense Code: Start Date: End Date:

Business Purpose:

Employee Information

Name: Title:

Department: ID Number:

E-mail Address:

Manager Information

Name: E-mail Address:

Itemized Expenses

Date	Description	Category	Cost
	<input type="text"/>	Other	0.00
		Subtotal	0.00
		Less cash advance	0.00
		Total expenses	0.00

Add Expense

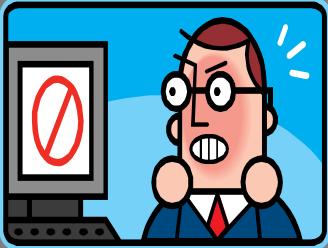
Item Details

- Desktop
 - About \$199 retail for standalone
 - Part of Office suites:
 - Professional Plus
 - Ultimate
 - Enterprise
- Web-based
 - Forms Services via SharePoint Enterprise



Efficient data collection, storage and retrieval

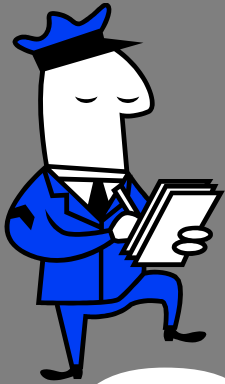
- Near term and long term savings
- Feed other systems



2

Error reduction

- Simple validation via wizards
- More flexible validation via code-behind
- Drop-down list boxes from external data sources



3

Regulatory compliance

- Secured (via SharePoint)
- Retention (via SharePoint)
- Auditing (via workflow history log)



4

Environmentally friendly

- No electricity required!
- Save a tree
- Reduce waste



1

New/Terminated Employee

2

New Client, Prospect or Patient

3

Expense Reimbursement

4

IT Support Ticket

When to Use InfoPath

1

To replace paper forms with the best electronic forms solution

2

To feed data collected from a form to another system (email, SharePoint lists, BizTalk, database)

3

To provide offline form capabilities

4

To assist in prototyping or design

About Workflows

- Business process
- A series of connected steps
- Human and computer interaction

Stages of a Workflow

- Workflow Association
 - Workflow installed by farm administrator at server level (or OOTB workflow is selected)
 - Workflow bound and configured by site collection administrator
 - SharePoint Designer association made automatically
- Workflow Initiation
 - Launched by user manually or automatically
- Workflow Status
 - Users can view status of workflows on any list item (document, form, etc.)
- Workflow Task Completion
 - Triggered by user or through code

Credit to Jeremy Sublett for content

Introducing SPD and Workflows

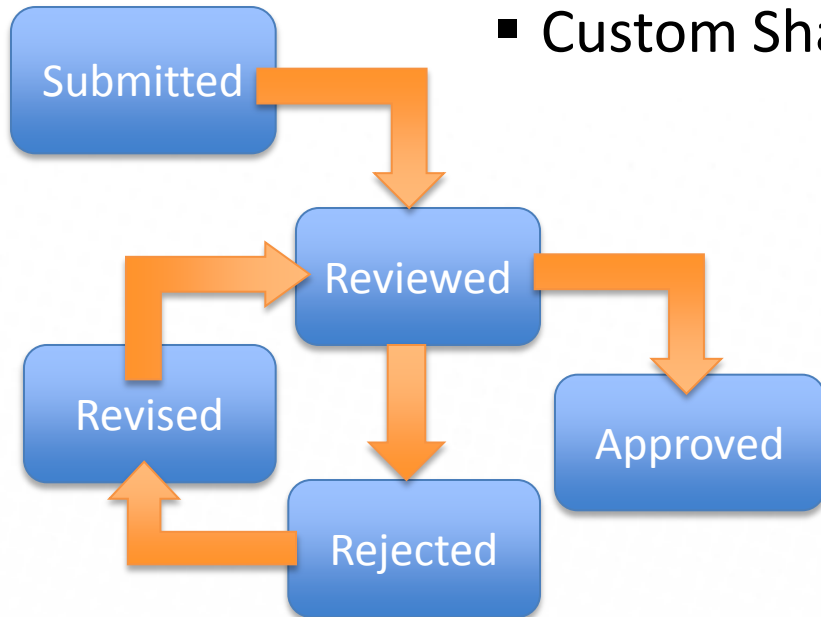


- SharePoint Designer
 - Now Free
 - No-code workflows
 - Limitations
 - Bound to specific list
 - Sequential workflows only (no state-based)
 - Workarounds exist!!!

- Porting SPD Workflows
 - Save site as template if creating new site
 - Source: Professional Microsoft Office SharePoint Designer 2007 by WROX
 - Manually change the *.xoml.xml file
 - Source: <http://tinyurl.com/portingspdworkflows>
(Paul Galvin via EndUserSharePoint.com)
 - Deploy as a SharePoint Feature via Visual Studio
 - Source: <http://spdtoolkit.codeplex.com/>
- SharePoint Designer 2010 Improvements

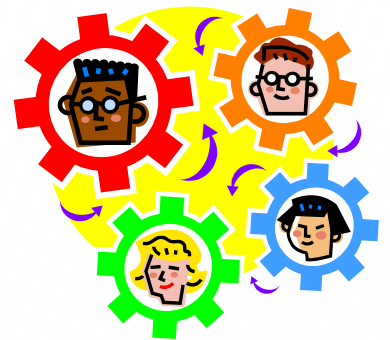
Introducing SPD and Workflows

- State machine workflows
 - Custom code via Visual Studio
 - Possible via SharePoint Designer
 - Read only status field in form
 - Use daisy-chained workflows
 - Custom SharePoint list for workflow history



The Streamlined Solution

- What makes a streamlined solution?
 - Intuitive design + fewer clicks + time saved searching for current status = happy end-users
- InfoPath Form + custom workflows + SharePoint libraries = streamlined solution



1

- Purchase Requests
 - Event handler to assign next request number from external data source
 - Approval workflows

2

- Change Management System
 - State machine workflow developed in Visual Studio
 - Form controls enabled/disabled based on user role and workflow state

3

- Timekeeping System
 - Code-behind to calculate week ending date, filter drop-downs and dynamic totals on rows/columns
 - Role-based security
 - Integration with billing system

4

- Equipment Inspection Forms
 - Forms dynamically created from Oracle (bluh!) database when check-out occurs
 - Form, template and xml for drop-downs downloaded to local folder
 - When docked, forms uploaded via custom uploader application based on Microsoft's Managed Addin Framework

Tips for a Better User Experience

- Include link to InfoPath form in email
- Hide/show buttons on form based on user role or workflow state
- Quasi-tabbed interface in InfoPath form
- Autocomplete or delete assigned tasks from workflow or event handler when changing states
- Use content types when appropriate
- Automatically name forms from an action in SharePoint Designer or an event handler on a form library
- Include status history in the form on its own tab for search-ability
- Custom user controls and actions

SharePoint 2010 Improvements

1

InfoPath Form Web Part

2

SharePoint List Form
Customization with InfoPath

3

Re-usable Workflows via
Content Type or Site-level

4

Import Workflows from Visio/
Save Workflows as .WSP Template

- For more information
 - SharePoint Designer
<http://office.microsoft.com/sharepointdesigner>
 - InfoPath
<http://office.microsoft.com/infopath>
<http://blogs.msdn.com/infopath>
<http://www.infopathdev.com>
 - SharePoint
<http://office.microsoft.com/sharepoint>
 - <http://www.sharepointforums.com>
<http://sharepointblog.kellerschroeder.com>
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