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5 Tips for making your InfoPath Forms User Friendly

Alana Helbig

Myriad Technologies

www.myriadtech.com.au/blog/alana



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The Old Way



Paper Forms... Boo!!



Problems with the old way

- Re-entering the same information over and over again
- Irrelevant information presented
- Environmental implications
- Duplicate data entry
- Paper forms get lost
- Data validation errors
- The list goes on.....



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The New Way



InfoPath Forms... Yay!!



5 easy tips your users will thank you for

Tip 1: Auto-populate the form with information you already have

Tip 2: Create an InfoPath Form Wizard

Tip 3: Display buttons that make sense

Tip 4: Protect approved forms by making them read only

Tip 5: Use dashboards to keep users up to date

Applies to InfoPath 2010 and InfoPath 2007.



Tip 1: Get user details



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Travel Request

Requested By **Alana Helbig**
Status **In Progress**

Next>> Close

Travel Information

Traveler Name	<input type="text" value="Alana Helbig ;"/>	 
Department	<input type="text" value="Business Content and Automation"/>	
Phone	<input type="text" value="0434 260 615"/>	



Tip 2: Create an InfoPath Form Wizard





Tip 3: Display buttons that make sense



The screenshot shows a web application interface for a "Travel Request" form. At the top left is the Myriad Technologies logo. The main content area displays the title "Travel Request" and the status "Requested By SPAdmin" and "Status In Progress". At the bottom, there are three buttons: "<<Back", "Save", and "Close".

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Travel Request

Requested By SPAdmin
Status In Progress

<<Back Save Close



Life of a form





Travel Request

Requested By Alana Helbig

Status Not submitted

<<Back

Submit

Close

Final Comments

You are submitting this travel request for Alana Helbig
Please enter any final comments and then click on 'Submit'

Other comments

<<Back

Submit

Close



Travel Request

Requested By Alana Helbig

Status In Progress

<<Back

Save

Close

Final Comments

You are submitting this travel request for Alana Helbig
Please enter any final comments and then click on 'Submit'

Other comments

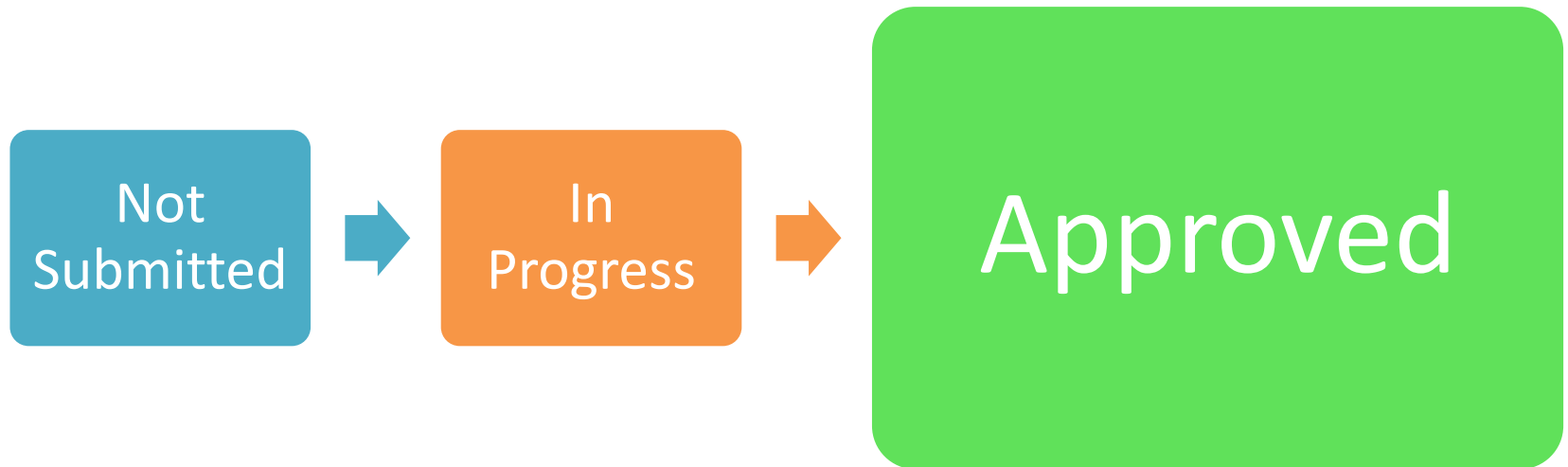
<<Back

Save

Close






Tip 4: Protect approved forms by making them read only





Tip 5: Use dashboards to keep users up to date

Travel Requests

<input type="checkbox"/> Name	Traveller	Reason For Travel	Return Date
Travel Request for Alana Helbig 2010-04-18T11_43_34 	Alana Helbig	going on a holiday	1/1/2010
Travel Request for Alana Helbig 2010-04-18T11_47_15 	Alana Helbig	Visiting client	5/25/2010
Travel Request for Alana Helbig 2010-04-18T11_48_39 	Alana Helbig	SharePoint Conference	6/6/2011
Travel Request for Alana Helbig 2010-04-18T11_49_10 	Alana Helbig	Training in Sydney	12/24/2010
Travel Request for Alana Helbig 2010-04-18T11_50_18 	Alana Helbig	Sales lead	3/29/2010



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Applies to InfoPath 2010 and InfoPath 2007.



Blogs to check out later

- Me – www.myriadtech.com.au/blog/alana
- Using the contact selector (InfoPath 2007) – Raghu Iyer - <http://metahat.blogspot.com>
- Using the UserProfileService – Itay Shakury - <http://blogs.microsoft.co.il/blogs/itaysk/>



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alana.helbig@myriadtech.com.au