

The Courseware Shop

Microsoft Office InfoPath 2007

One Day Course

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COURSE INTRODUCTION

This course explains how InfoPath 2007 can help you record data in electronic forms, export data to other programs, import data from other programs, modify and customise the built in sample forms. This one day course consists of 3 modules.

Module 1 This module explains the purpose of electronic forms, the elements that can make up a form, and the lifecycle of a form.

Module 2 This module explores the getting started dialog box and enables you to practice opening, completing and sending a form using Outlook 2007. The module also explores how Outlook 2007 can be used to store and organise returned forms, and exporting the form data to Excel 2007.

Module 3 This module explores how to import forms, modify form control properties and customise the built in forms.

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MODULE 1 – INTRODUCTION

OBJECTIVES

After completing this module, you will be able to:

- Describe the functionality of InfoPath 2007
- Identify the elements of a form
- Describe the lifecycle of an InfoPath 2007 form

InfoPath 2007 is a form design and data gathering program. Returned data can be shared with other programs in Microsoft Office 2007 suite. Using InfoPath 2007, you can reduce data-entry errors and improve the quality of the data collected.

InfoPath 2007 helps you design and publish bespoke form templates. You can also convert existing paper-based forms to InfoPath 2007 forms. Forms can be published via e-mail, web browsers, or mobile devices.

In summary, the InfoPath 2007 program provides an efficient and easy way to create, publish, and manage electronic forms and the returned data.

Assume that you have to conduct a customer satisfaction survey for a product that your company sells. To obtain accurate and sufficient information, you need to contact as many customers as possible. To collect the data, you send and receive forms manually or by fax and then record and analyze the data by manually typing the survey results. This manual process is time-consuming and prone to error. To simplify the process and ensure accurate data, you can instead use form templates in InfoPath 2007.

Using InfoPath 2007, you can easily switch to an automated process for filling forms and collecting data. You can design InfoPath 2007 form templates and distribute forms in more reliable ways, such as through Web browsers or e-mail.

WHAT ARE FORMS?

An InfoPath 2007 form is a structured electronic document that contains elements, or controls, such as text boxes and other fields for entering information.

The screenshot shows a 'TRAVEL REQUEST' form with several controls highlighted by red lines and labels:

- Text Box:** Points to the 'Business Purpose' field.
- Date Picker:** Points to the 'Request Date' field, which shows '03/09/2008' and a calendar icon.
- List Box:** Points to the 'From:' field in the 'TRIP' section.
- Check Box:** Points to the 'Include hotel' checkbox.
- Repeating Section:** Points to the 'Add trip' button.
- Rich Text Box:** Points to the 'Notes' field.

FORM ELEMENTS

The elements of a form help you design a user-friendly and flexible form template.

TEXT BOX

You can enter any type of unformatted text such as sentences, names, numbers, dates, and time into a text box. A red asterisk denotes that the field cannot be left blank.

DATE PICKER

You can type a date in the box or use the calendar button to select a date.

DROP-DOWN LIST BOX

A drop-down list box includes a list of choices in a box. You click an arrow to view the list of choices.

CHECK BOX

You can set TRUE or FALSE and binary values by selecting or clearing a check box.

REPEATING SECTION

A repeating section is a control that contains other controls. You can use a repeating section to either add or remove a section e.g. to add a list of expenses claimed.

RICH TEXT BOX

A rich text box can contain formatted text, images, lists, and tables.

LIFECYCLE OF AN INFOPATH 2007 FORM

Using InfoPath 2007, you can create, publish (deploy), and collect data.

CREATING A FORM TEMPLATE

Based on your information requirements, consider the following before you start creating a form template:

- **Well-defined purpose.** Consider what you want users to accomplish with the form.
- **Create or Modify.** You can create a new form template or modify an appropriate form template from the InfoPath 2007 sample forms.
- **Existing forms.** You can import/convert and modify paper-based forms to InfoPath 2007 forms.

Note: The paper-based forms that are designed in Word or Excel can be imported into an InfoPath 2007 using the Import Wizard in InfoPath 2007. If a form is created in some other program, or if you cannot access the original source file of a form, then you will need to design your form template from scratch in InfoPath 2007.

- **Data storage format.** If you want to share forms and data, consider storing related InfoPath 2007 forms on a SharePoint Server 2007 document library.
- **Publishing considerations.** A standard form template can be used only in InfoPath 2007. If the form users do not have InfoPath 2007 installed on their computers you will need to design a browser-compatible form template.

PUBLISHING A FORM TEMPLATE

After you have completed the design phase, you publish the form. First save the form and then use the Publishing Wizard to distribute the forms to users. You can publish a form in the following ways:

- To a SharePoint server, with or without InfoPath Forms Services
- As part of an e-mail message
- To a shared network folder
- As an installable file that you create by using Microsoft Visual Studio

FILLING OUT A FORM

If users have InfoPath 2007 installed on their computer, they can use the Fill out a Form option to enter data. Alternatively, users can fill out and send a form as an e-mail attachment.

MANAGING DATA

Data storage can be internal or external to the InfoPath 2007 template and is referred to as the data source. A data source consists of all data that is entered into a form.

Internal data can be any data that is added by a user in a text field.

External data can be submitted to or retrieved from other data sources e.g. a Microsoft Office Access database or a Microsoft SQL Server database. To ensure that a form retrieves or submits data from or to an external data source, you create a data connection between the form and the data source during the design phase.

If there is no data storage connection defined for a form template, the data is stored in an internal data source. You can export internal data to Office Access and Excel. You can also export the data into Portable Document Format (PDF) format, XML Paper Specification (XPS) format, or Web pages.

MAINTAINING FORMS

It is important to collect feedback from form users to ascertain whether a form requires modification. After modifying a published form template, republish the new form template to the original location.

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