

## Choosing Views

Views are used in InfoPath 2007 to split up a large form into smaller pieces. This is usually done so the form can be spread over a number of pages when printing.

To switch views, simply click View → (view name):



## Resource Files

When filling in an electronic form, you often see a combo box asking to state your country of birth. When you click the pull-down arrow, a list of countries appears. The source data to 'fill in' the combo box when making a form in InfoPath can easily be created with XML. Consider this file:

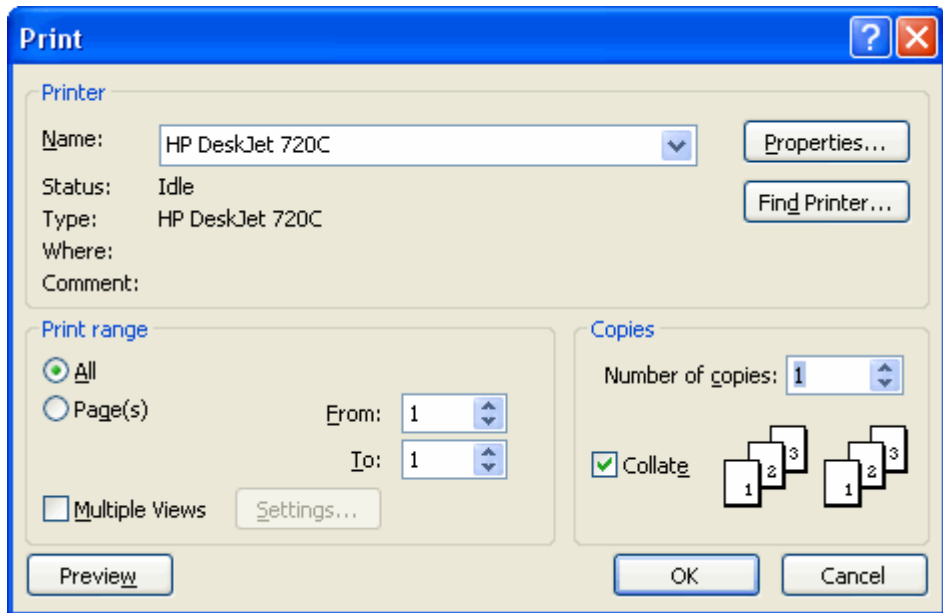
```
<SPECIES>
<ANIMAL>
<ANIMAL_NAME>SHARK</ANIMAL_NAME>
</ANIMAL>

<ANIMAL>
<ANIMAL_NAME>DOG</ANIMAL_NAME>
</ANIMAL>
```

To add the contents to a combo box, first select the combo box to populate with the source file. Click Tools → Resource Files and then browse for the file. As long as the link to the resource file is not broken or changed, the contents of the XML file will always be shown in the form combo box.

## The Print Dialogue Box

When you want to print a document, you can open this dialogue box by using one of these three methods: Click File → Print, click the small printer icon on the Standard Toolbar, or press Ctrl + P:



The Printer section lets you choose a printer that is attached to your computer or available on your network. To adjust colour settings and other printer information, click the Properties button (more details below.)

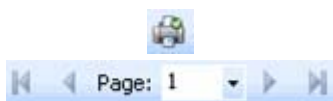
The Print range section lets you pick which pages to print. Check the Multiple Views checkbox to print more than the current view (selecting the All radio button will only print all of the current view.)

The Copies section lets you print as many copies of the document as you like. If you have a document that is three pages, and you want two copies, clicking Collate will print 1,2,3,1,2,3. With Collate unchecked, the pages will print 1,1,2,2,3,3.

If you click the Properties button, the current printer settings will appear for your machine. The Layout tab lets you print the file in landscape or portrait mode, print the pages from front to back or back to front, and pick the number of pages per sheet. The Paper/Quality tab will let you set the colour properties and print quality for your machine. However, all printers are different and you might not be able to adjust some settings or you might be able to adjust other advanced settings, particularly if your printer can handle larger paper formats.

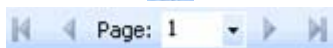
## The Print Preview Toolbar

Click File → Print Preview to view the document as if it were printed on paper. At the top of the screen is the Print Preview toolbar which is used to view your document in its entirety before it will be printed:



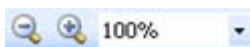
**Print**

Click this button to open the Print Dialogue box and print the document.



**Navigation Tools**

Use these tools to view the different pages of your document, if applicable. Use the single arrows to move one page at a time, or use the end arrows to jump to the first or last page. Use the combo box in the middle to jump to a specific page.



**Zoom Tools**

Zoom into or out of the document. You can use the zoom commands to check for misaligned information in your form, or keep zooming out to view more than one page at a time.



**Close Button**

Closes the Print Preview mode and returns to the InfoPath screen.

## Publishing a Form

InfoPath allows you to publish a form in one of four locations. Click File → Publish and then select a location:

- A SharePoint Server (with or without InfoPath Forms Services)
- A list of e-mail recipients. InfoPath will send the form to a new Outlook message. Enter the recipient's addresses and click Send.
- A network location, which can be useful if sending the forms to other members of your company.
- An installable form template. This option requires Microsoft Visual Studio and is only recommended for use by networking and IT professionals. Users can edit the form at code level.

## Accessing Form Options

Click Tools → Form Options. These options provide the majority of extra control for your form. There are eleven categories, but we will go over the most common:

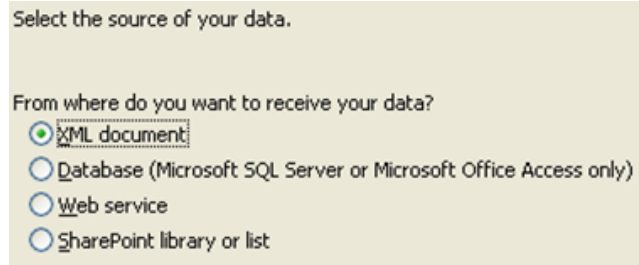
<b>Open &amp; Save</b>	Customize what files InfoPath can open and how they are opened
<b>Offline</b>	Dictate how InfoPath works with no external connection
<b>E-Mail Attachments</b>	Control what is sent via e-mail publish and enable/disable form functionality
<b>Property Promotion</b>	List external data sources that are available with SharePoint and Outlook
<b>Digital Signatures</b>	Control how digital signatures are applied to your files
<b>Security &amp; Trust</b>	Control which information a form user has access to when filling in a form
<b>Compatibility</b>	Force compatibility with different Web browsers and InfoPath 2003
<b>Advanced</b>	Define default form values, disable form customization, and treat empty spaces as zero.

## Managing Data Connections

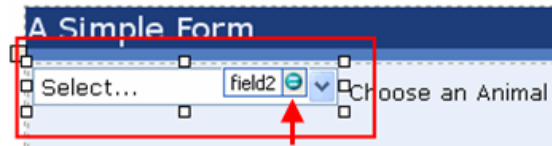
In most cases, you will use an external data connection (source) to place information into a form, like in a combo box, or store information a user has entered themselves, like a survey. InfoPath lets you add a data source as one of the four:

- XML Document, usually used to populate combo boxes or list boxes.
- Database file (Microsoft SQL Server or Office Access formats only)
- Web service, which sends/receives form information with a third party
- SharePoint library or list on a corporate network

To add a source, first select the control or text field that will store/submit information. Click Tools → Data Connections. Then click Add. Depending on the network settings enabled on your computer, choose a connection to Submit or Receive data. Next, choose your source (or destination):

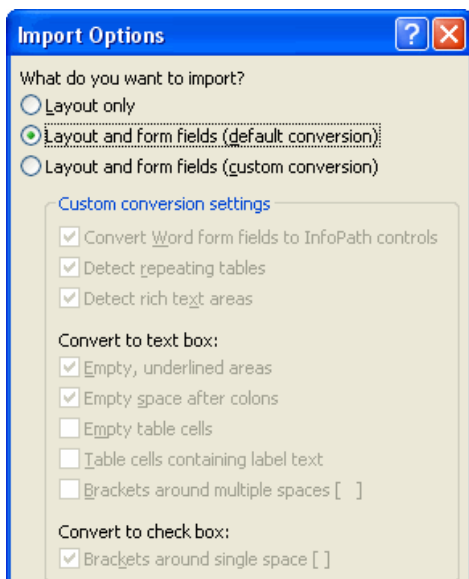


Finally, select the source file or enter the remote location information and click OK. You can tell the connection has been successfully established by the green dot beside the control.



This indicates that InfoPath has successfully found and recognizes the external data or location.

## Importing a Form from Word or Excel



If you have already created a form in Word or Excel, you can import it to InfoPath and save a lot of time. Because the Office family of products was designed to work together to some degree, most forms will import without any trouble.

To do this, Open InfoPath and click the Import a Form link in the lower left hand corner of the Getting Started window. You can also do this by clicking File → Import Form. Select which program provided the source file you are going to use and click Next.

Then select the source file with the Browse button. When you click Finish, you will be shown the Import Options dialogue box. You have the choice to import using one of the following three methods:

**Layout only:** The layout of the source form is only the table structure used to hold the source elements. The fonts, colours, and table properties will be imported from the source.

**Layout and form fields(default):** This option imports the layout as above as well as whatever controls were used in the source form. This option will be used most of the time, and will attempt to convert as many features as possible from the source.

**Layout and form fields (custom):** This option lets you pick and choose which conversion options you want to use when importing a form.

If the import process does not successfully convert something from the source, you can use the Design Checker (in the task pane) to examine your document. Anything out of the ordinary should be picked up and InfoPath will provide options to fix the layout issues.