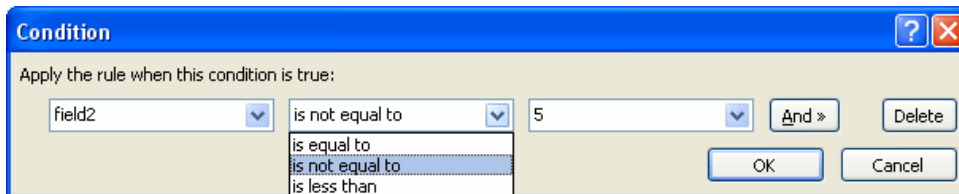## Applying Logical Conditions

You can place logical checks on controls in your form. This allows you to check the data in the control and test it against some logical condition. If the condition passes, then an operation can be performed. If the condition fails, you can do nothing or have another action take place.

You can also apply more than one logical check if you wish, just click the And button and fill out extra conditions:

Right-click the control you want to apply with a condition and click Properties. In the Data tab, click Rules and enter the condition as above.

Setting Data Validation

Data validation is similar in nature to applying logical conditions. However, data validation is used to ensure that the correct type of data is entered by the user. For example, if an employment form asked for an age, and the user entered an age under 16 years, the form can generate an error message stating that the data is incorrect.
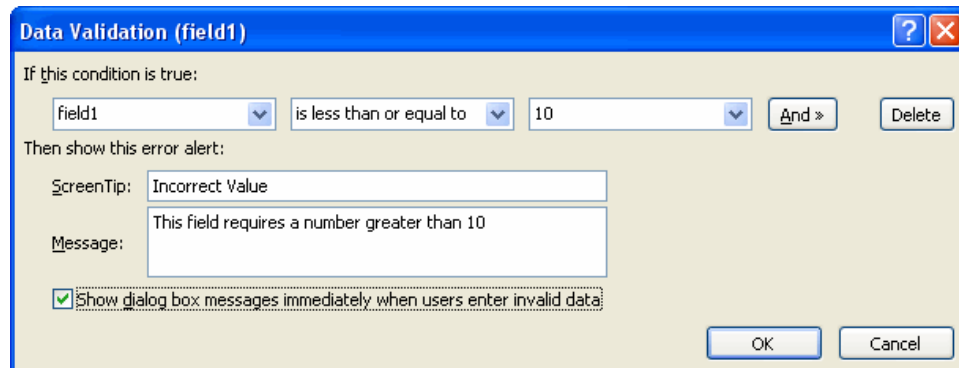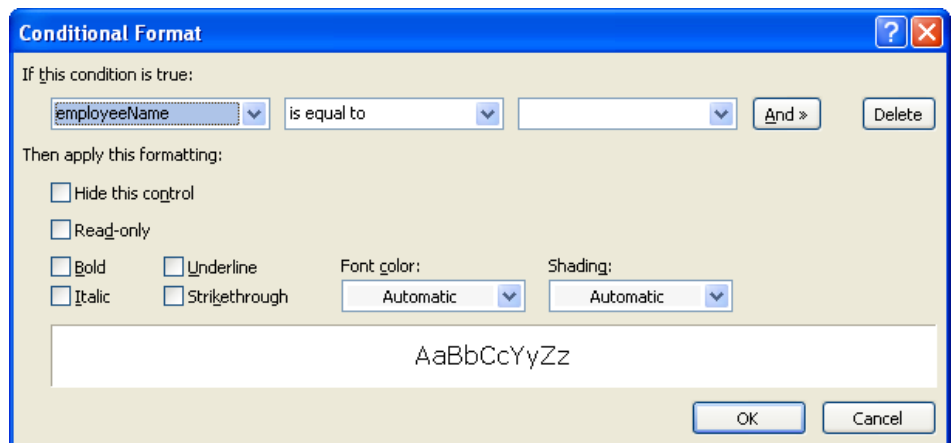

Right-click the control you want to test for valid data and click Properties. In the Data tab, click the Data Validation button.

Data Sources

InfoPath has the ability to create forms based on an XML data file, an XML schema, or a Microsoft Access Database.

To create a form using a data source, Click File → Design a Form Template. You can then choose from database or XML/schema:
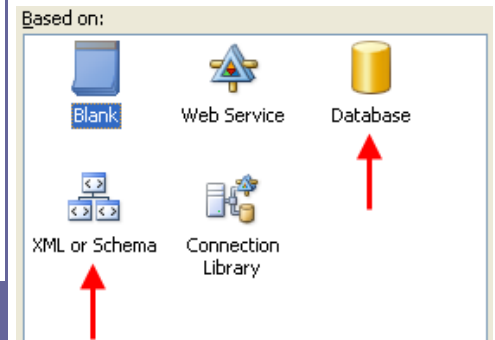
Enter the name of the file or specify the location where the source data is stored. After the wizard imports the fields, you will be able to view them in the Data Source view of the task pane:

Conditional Formatting

There is one final action you can perform when applying logical conditions to a control, conditional formatting. If a user enters a value that is above a certain value, a different part of the form might become red to emphasize that the fields must be filled out.

A common use for conditional formatting is to apply a check to a checkbox. If the user checks the checkbox, then another part of the form could become active or inactive.

A common situation where you might see this is when installing a software package on your computer. The licensing agreement usually requires you to check a checkbox stating you accept the terms of the agreement. Only after you check the box can you proceed.

Default Form Values

Default values are useful when creating forms. They automatically fill themselves into a field with some common value or with instructions stating what should be filled in by the user.

To enable default values, select the form control(s) you want to apply the default value to and click Tools → Form Options. In the Advanced section, click Edit Default Values. Select a field and enter a default value:

SharePoint Prequisites

In order to take advantage of a SharePoint server, you will need to have the following:

Computer Req.	A computer with Windows 2000/XP/Vista with at least 512 megabytes of memory (1 gigabyte for Vista)
SharePoint Server	A server with SharePoint Services 3.0 or SharePoint Services 2007. You will also need a username and password.
Internet Explorer Browser	Because SharePoint relies heavily on Microsoft technology, Internet Explorer v6.0 or 7.0 is required in order to take advantage of SharePoint features.
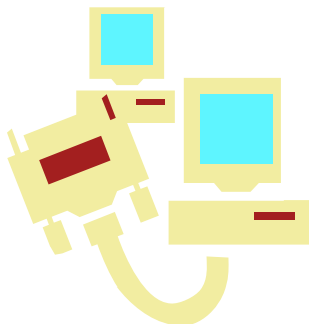
Publishing a Form to SharePoint

Using a SharePoint server to distribute a form in your organization is a good idea because everyone has access to it, it's one less thing to clutter your e-mail inbox, and a form can be filled out at any time. Uploading a form involves specific steps, but is all controlled by a wizard.

1.	When you have completed your form and are ready to publish, click File → Publish.
2.	Select the publication method; in this case, to a SharePoint server:
3.	Enter the server information for your SharePoint site:
4.	Enter you username and password.
5.	The responses to your form are stored in a document library. It is recommended you create a new library for every form that is updated, in order to keep different data separate, however this is not necessary. Create the document library... Then create a new library for the form or select an existing library.
6.	Enter a name and description for the firm so you and others know what information the form is designed to collect:
7.	This step is one of the most important; you will specify which fields will be promoted; that is having their values stored in the document library. Chances are you will want to retain all values, though you have the option of picking only certain values.
8.	Once all these steps are completed, you will see the following confirmation. Click Publish to upload the form to the server.