Microsoft Office®
InfoPath
Quick Reference Tutorial

2007

RARE IT

Launch InfoPath

Open InfoPath 2007 by double-clicking the InfoPath icon on your desktop:

Microsoft
Office InfoP...

You can also launch InfoPath from the Start Menu. Click:

Start → All Programs → Microsoft Office → Microsoft Office InfoPath 2007.

What is XML?

XML Stands for Extensible Markup Language, the background code that makes up a form that is created in InfoPath.

A markup language is one that contains 'tags'; that is identifiers that signal the beginning and end of a property. You have likely already heard of a markup language before; HTML (HyperText Markup Language) is the 'code' used to create and display Web pages.

HTML is strictly defined, that is only keywords inside tags <like this> are recognized. XML however, is completely open. The only requirement of XML is that a starting tag <this> is eventually closed with an ending tag </this>:

```
<employees>
  <employee>
    <name> Bob </name>
  </employee>
  <employee>
    <name> Jim </name>
  </employee>
</employees>
```

Because of this code flexibility (and really only one rule), XML is a great language to use in order to pass information. The XML code can be created without needing to be compiled into workable code, but rather can be sent as a text file and interpreted somewhere else.

When you submit form information over the Internet, your <name> and <address> are probably send via XML!

Interface Overview
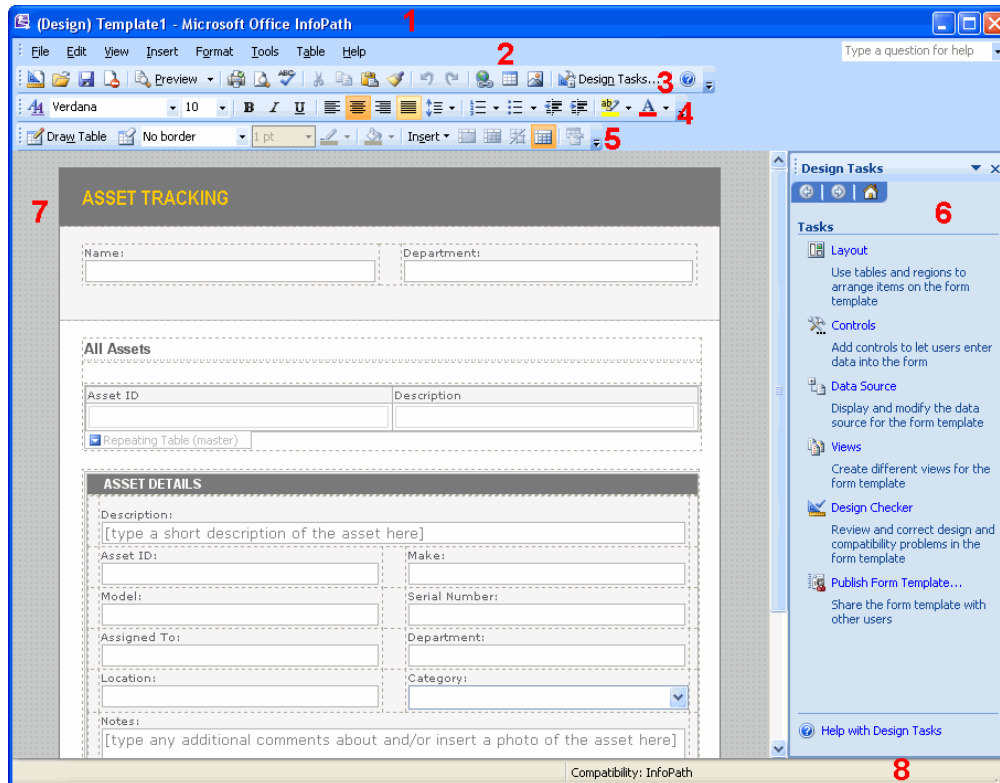
1: Title Bar — The title bar identifies the application and the current file that is open in it.

2: Menu Bar — The menu bar contains menu headings that categorize the functionality of InfoPath.

3, 4, and 5: Toolbars — Toolbars are essentially groups of buttons that you can click to execute InfoPath commands. You can move toolbars around the application screen with your mouse, and place them in locations that are the most convenient for you.

6: Task Pane — Task panes are special windows that contain links and options for quick access to common features.

If you right click on an empty area near the InfoPath menu bars or toolbars, you will see a menu that allows you to hide or display the task pane or toolbars.
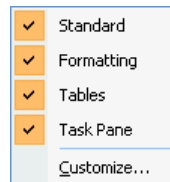
Items with a checkmark next to them are displayed on the InfoPath screen. You can add or remove checkmarks by clicking.

7: Working Area — The working area is the main large area of the InfoPath window. This is where you design, build, edit, and modify your forms.

8: Status Bar — The status bar will typically show information about the current state of the application, and the file that is currently being worked on.

Window Controls

Nearly every window that is visible when doing anything in Microsoft Window contains the same three buttons in the upper right-hand corner of the screen.

|		
	Minimize	Click this button to make the window disappear. The window and its contents are accessible by clicking the appropriate program button in the Start bar.
	Maximize / Restore	Maximize will expand the window to fill the whole screen. Restore will shrink the window to the size it was before being maximized.
	Close	This will close the program. If you are working on any files at the time, you will be prompted to save the changes first.

The Help Menu

The Help menu contains links to the InfoPath help file, Office Online, Office Diagnostics, and information about InfoPath itself.
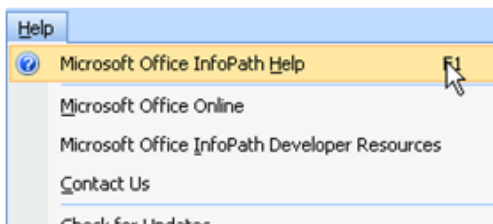
Using the Getting Started Window

The Getting Started window is launched automatically when you open InfoPath. This starting window contains links to recently used templates and documents, lets you open an existing form, contains the tools to get started from scratch, and more:
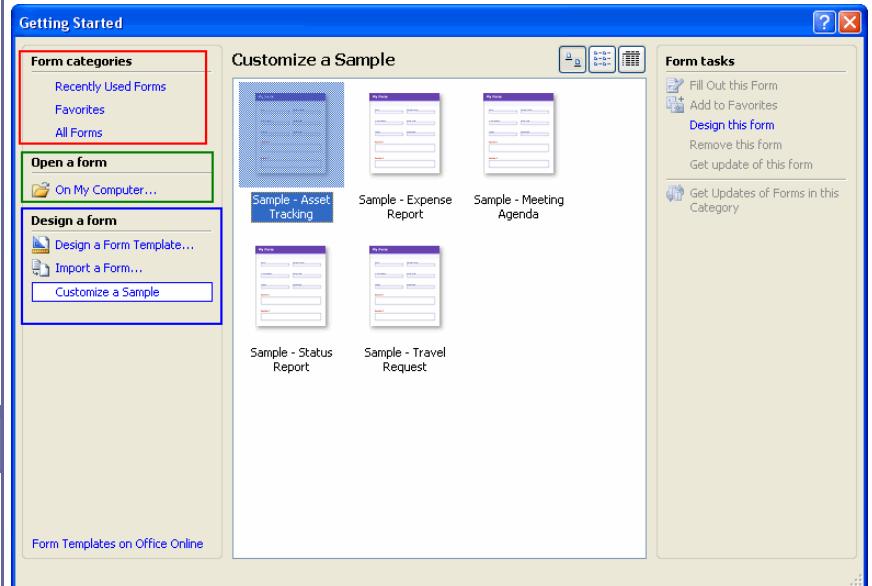
Using the window is fairly straightforward. Select a category or action from the lists that are highlighted on the left. In the centre of the window, the individual files or options relating to your category choice are displayed. On the right, you will occasional see additional options to support your current selection.

For example, Customize a sample was selected from the list on the left. A form sample is highlighted in blue in the centre part of the window. On the right, under the Form tasks heading, you can see that the option to Design this form is active.

The Standard Toolbar

The Standard Toolbar is located directly under the menu bar. This toolbar contains quick links to common command tools you will use nearly every time you work with a form in InfoPath. Become familiar with these commands and you will soon be well on your way to becoming an expert with InfoPath!

	Design a Template	Clicking this button will display the Design a Form Template dialogue.
	Open	Open an InfoPath file of your choice in Design View.
	Save	Save your work.
	IRM Permissions	Set up Information Rights Management.
	Preview	Preview the form or configure your preview options.
	Print	Print the current form.
	Print Preview	See a preview of what the printed form will look like.
	Check Spelling	Display the Spelling task pane.
	Cut	Moves selected element to the clipboard.
	Copy	Copies selected element to the clipboard.
	Paste	Pastes an item that was copied to the clipboard.
	Format Painter	Copies and applies formatting from one item to another.
	Undo	Restores the state of your work to a point just before the last action.

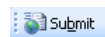|		
	Redo	Redoes an action that was undone.
	Insert Hyperlink	Displays the Insert Hyperlink dialogue.
	Insert Layout Table	Provides options for inserting a table in your form.
	Insert Picture	Displays a dialogue that lets you locate and select a picture to insert into your form.
	Design Tasks	Display the Design Tasks task pane.
	Microsoft Office InfoPath Help	Displays a searchable help window that can show results from the Office Online Web site. (Internet connection is required for Office Online results).
	Fill out a Form	Use this button to begin filling out form fields in a form that is open in InfoPath.
	Submit	This button will return the completed form to the sender (submit results).