

Creating InfoPath 2007 forms with InfoPath Forms Services for the Enterprise

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Who am I?

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Description

With the new version of SharePoint and InfoPath being officially released this year the concept of building and using e-forms in the enterprise has officially become a reality by using InfoPath 2007, InfoPath Forms Services and SharePoint 2007 Enterprise. This presentation will describe how to use InfoPath 2007 and InfoPath Forms Services (part of SharePoint 2007 Enterprise) to accomplish this with your existing or new SharePoint 2007 Enterprise installation. A demo will be given to show how to build and publish an InfoPath 2007 form to InfoPath Forms Services and how to active the forms from InfoPath Forms Services to a Site Collection.



Agenda

- InfoPath Template Parts
- InfoPath Forms Services
 - Browser based forms
- SharePoint Data Connection Library
 - Site Collection
 - Central Admin
- SharePoint Content Types & Site Columns



VPC Image

- Windows 2008 Server Enterprise (Active Directory)
- .NET 3.5
- SQL 2005 SP2
- Microsoft Office SharePoint Server Enterprise
 - Infrastructure Update (12.0.0.6318)
- Visual Studio 2008 Professional
- Office 2007 with SP1
- IE 7



InfoPath Template Parts

- What is a Template Part?
 - Control (.NET User Control)
 - Sub set of a InfoPath Form
 - Data Connection
 - Data Source
 - Data Validation
 - Rules
 - Conditional Formatting
 - Allows for single click updates



InfoPath Template Parts Demo

- Demo
 - How to Create a Template Part
 - Browser compatibility
 - Import Template Part into InfoPath Form Controls Task Pane
 - Updating an existing Template Part on a active form
 - How to share with other co-workers



InfoPath Forms Services

- What is InfoPath Forms Services?
 - Server technology that converts InfoPath 2007 forms to browser based forms
 - Supported browsers:
 - Internet Explorer
 - Apple Safari
 - Mozilla Firefox
 - MOSS 2007 and Forms Server 2007



InfoPath Forms Services

- Is it available in WSS?
 - No
 - Forms Server 2007
- How can it be published?
 - Content Type
 - Document Library (old way, bad way)
 - Administrator Approved



Data Connection Library

- What is a Data Connection Library?
 - A library that can contain Office Data Connection (ODC) file or a Universal Data Connection (UDC) file.
- If its not available
 - Office SharePoint Server Enterprise Site Collection features
 - Office SharePoint Server Enterprise Site features
- Which one does InfoPath use?
 - InfoPath 2007 uses Universal Data Connection (UDC) file and the extension is “udcx” or “xml”.



Universal Data Connection file

- Why do I need to use them?
 - It allows browser based forms to access Web Services securely, even if it's in a different domain.
 - It allows browser based forms to be submitted across Site Collections and Web Applications

All the benefits can be found at the below link

<http://msdn2.microsoft.com/en-us/library/ms771995.aspx>



Data Connection Library Demo

- Demo
 - How to create a Data Connection Library
 - How to convert a InfoPath Data Connection to Universal Data Connection file
 - How to upload Universal Data Connection file to Global Data Connection Library



Content Types and Site Columns

- What is a Content Type?
 - A Content Type can be multiple things but for our purposes it is an instance of an InfoPath form that allows global attributes to be assigned to it and gives it the capability to be used in multiple locations within a Site Collection.



Content Types and Site Columns

- What is a Site Column?
 - A Site Column is a single field that is created at the Site Collection, List or Library level that stores data.
 - A Site Column at the Site Collection level is like a template and it can be imported in by a List or Library.



Content Types and Site Columns

- Benefits of Content Types for InfoPath?
 - One form to use in multiple locations
 - One form to update with new changes
- Benefits of Site Columns for InfoPath?
 - Capability to reuse existing Site Columns
 - Keep Form Libraries less cluttered
 - One column to update when a change is needed



Content Types and Site Columns Demo

- Demo
 - Publish the form for InfoPath Forms Services
 - Set Site Columns to be created
 - Upload and Activate InfoPath Form
 - Create Form Library and specify new form Content Type



Links

- <http://msdn.microsoft.com/en-us/library/bb409614.aspx>
- <http://msdn.microsoft.com/en-us/library/bb979620.aspx>
- <http://office.microsoft.com/en-us/infopath/FX100647031033.aspx>
- <http://office.microsoft.com/en-us/infopath/HA102116701033.aspx#1>
- <http://office.microsoft.com/en-us/formserver/FX100490391033.aspx>



Thank You !

Questions about InfoPath 2007 or InfoPath
Forms Services?

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