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SharePoint 2010 InfoPath Quick Overview

InfoPath is a toolset designed for power users to create forms that users can then fill in. The InfoPath designer tool is available with the Microso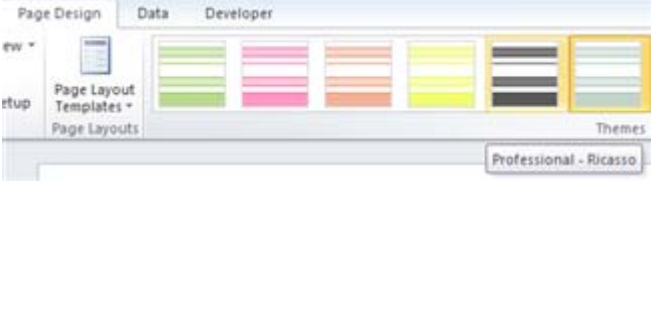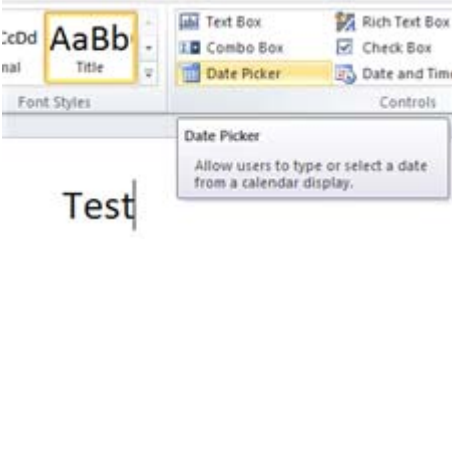ft Professional Office 2010 edition. Also it should be noted when designing forms – so that a client piece of InfoPath (named the Microsoft InfoPath Filler 2010) does not have to be installed on every computer that is to use the form that is created – a web-site version of the form should be created for better architecture and flexibility.
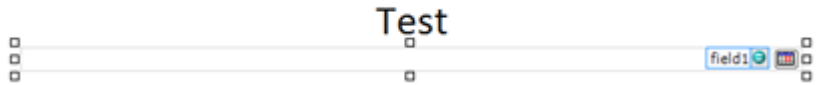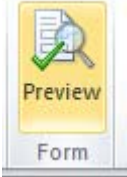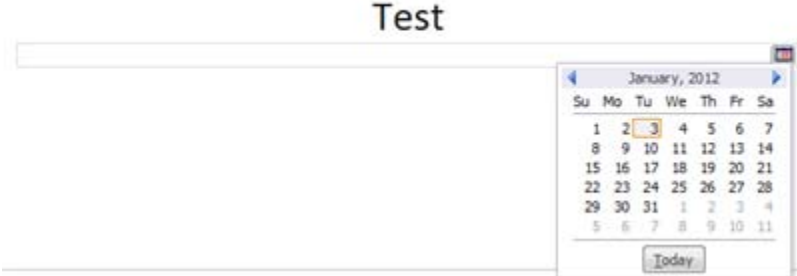
The steps below cover creating a simple InfoPath Form

1. Access the InfoPath Designer 2010 – found from Start -> Microsoft Office -> Microsoft InfoPath Designer 2010	**Microsoft Office** A Microsoft Access 2010 X Microsoft Excel 2010 I Microsoft InfoPath Designer 2010
2. Select No if prompted unless you wish .xml files to open in InfoPath	Microsoft InfoPath Microsoft Office is not currently set as the default program for opening and editing .xml files. Do you want to set Office as the default program? ☐ Don't show this dialog box again Yes No
3. Under Popular Form Templates double click Blank Forms	Available Form Templates Popular Form Templates SharePoint List SharePoint Form Library E-mail Blank Form Blank Form (InfoPath Filler)

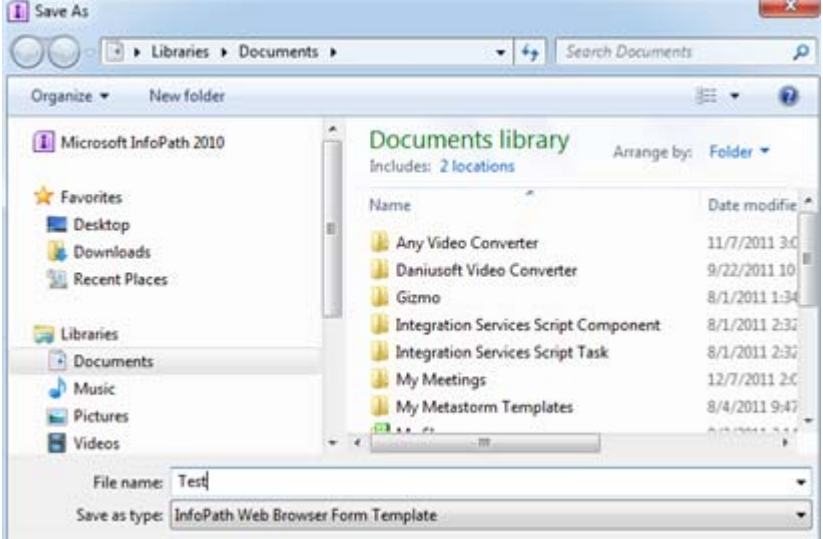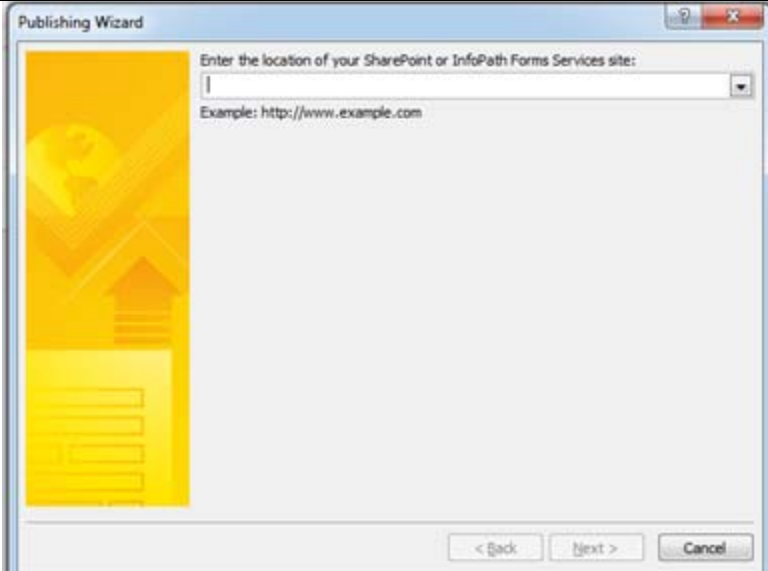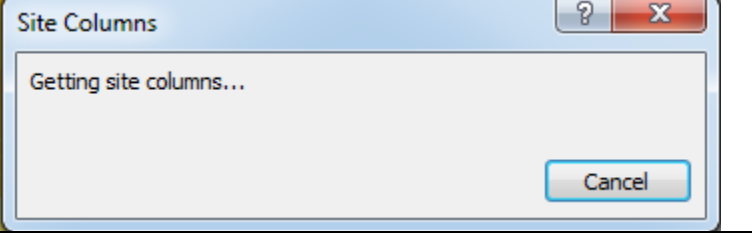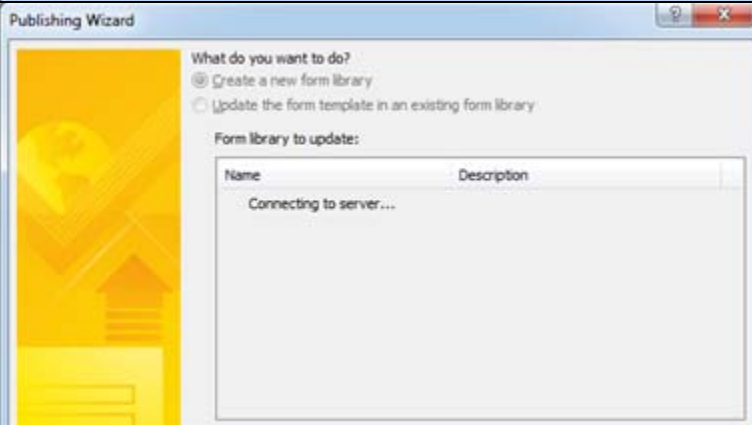|	
4. The screens middle section will appear as such:	Click to add title Add tables
5. Click to add title and type in "Test"	Test Add tables
6. On the Page Design tab click a selection – in this case Professional – Ricasso was selected.	Page Design Data Developer ew Page Layout Templates Page Layouts Themes Professional - Ricasso
7. Select the Home tab – then place the cursor on the title line (where it says Test) – hit enter once then from the toolbox select the Date Picker	:cDd AaBb Text Box Rich Text Box nal Title Combo Box Check Box Date Picker Date and Tim Font Styles Controls Date Picker Allow users to type or select a date from a calendar display. Test

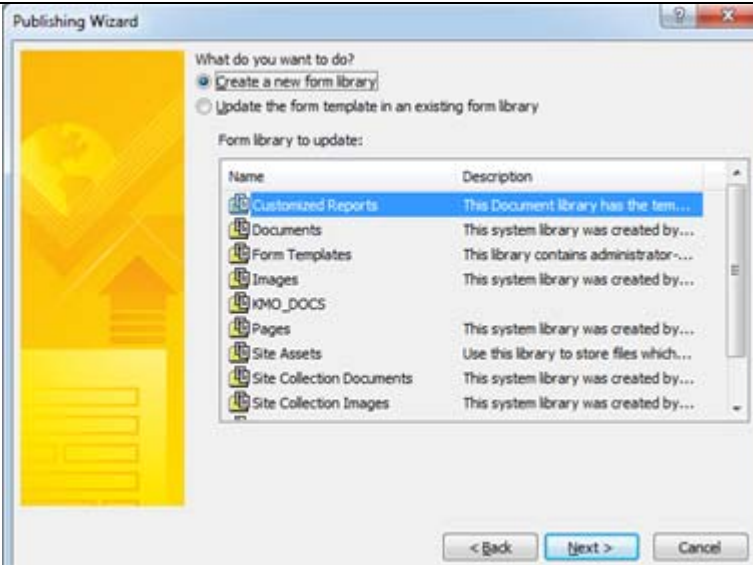|	
8. The date picker is added to the form	**Test** field1
9. In the Ribbon select the Preview button which is likely on the far right – under the Form group	Preview Form
10. The form is shown and the control that was added can be selected	**Test** January, 2012 Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 1 2 3 4 5 6 7 8 9 10 11 Today
11. On the ribbon select the Close Preview button – under the Preview section	Close Preview Preview **Close Preview** Close this preview window and return to the InfoPath Designer. LOST

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12. At this point – select File -> Save As and save and name the form into a directory of your choice	
13. To publish the form to SharePoint – from the File tab – select Publish	**Publish your form** When you are finished designing this form, publish it so others can fill it out. Publish location: Not published.
14. Select SharePoint Server	Publish form to a SharePoint Library Create or update a form library form on SharePoint. Users can access this form online.
15. Enter in the name of the SharePoint site and click Next	Enter the location of your SharePoint or InfoPath Forms Services site: Example: http://www.example.com

WEBSITE: HTTP://WWW.KMO.NAME
E-MAIL: ONEILLWEBSITE@VERIZON.NET
USE ALL COMMANDS AT OWN RISK

16. A wizard will then run	**Site Columns** Getting site columns... Cancel
17. When prompted check "Enable this form to be filled out by using a browser" and select Form Library then select Next	**Publishing Wizard** ☑ Enable this form to be filled out by using a browser What do you want to create or modify? ⦿ Form Library Publish this form template as a template in a form library. A form library stores forms based on this form template. Users can open and fill out forms in the library. You can specify which fields in the template appear as columns in the library. ○ Site Content Type (advanced) A site content type allows this form template to be used in multiple libraries and sites. You can specify which fields in the template appear as columns in the library. ○ Administrator-approved form template (advanced) Prepare this form template for an administrator approval. < Back Next > Cancel
18. The server will be contacted	**Publishing Wizard** What do you want to do? ⦿ Create a new form library ○ Update the form template in an existing form library Form library to update: Name Description Connecting to server...

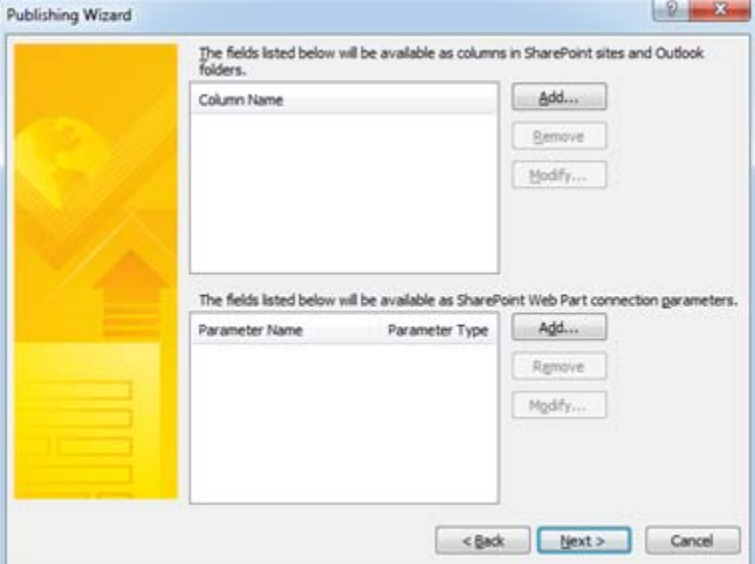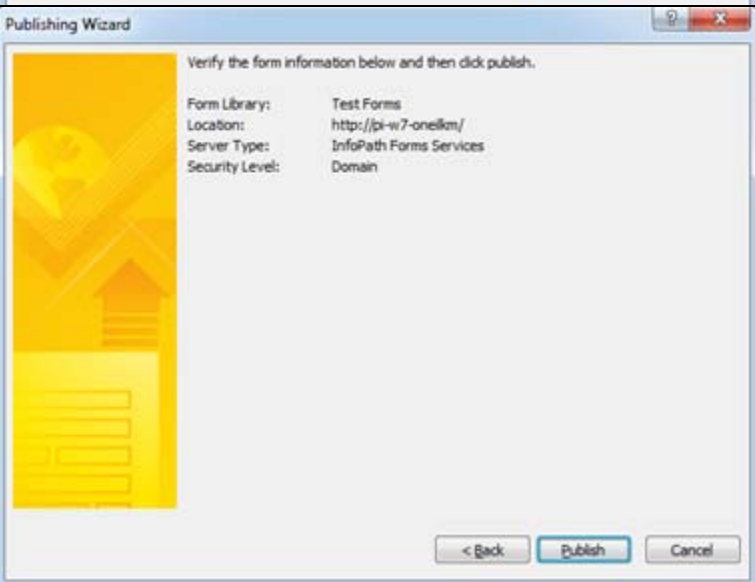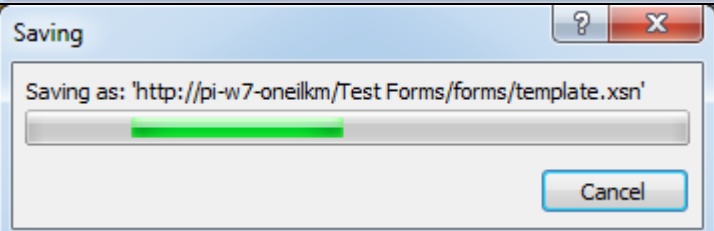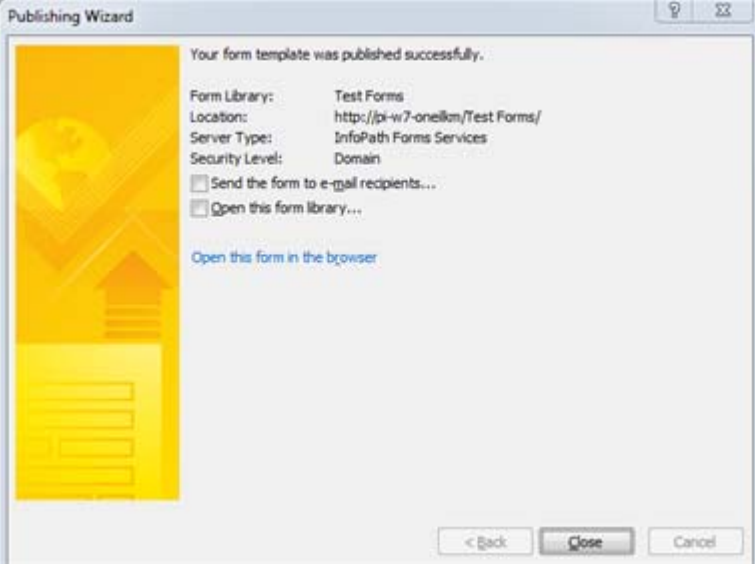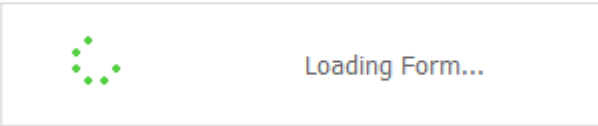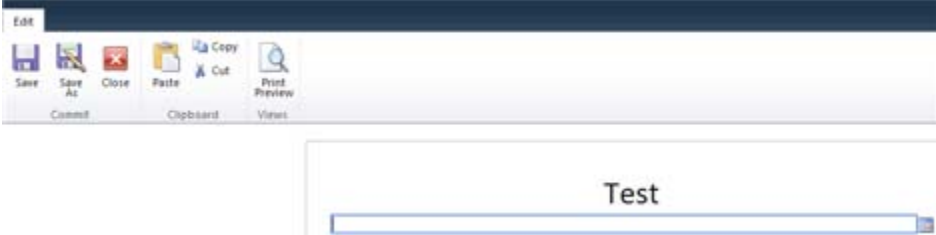|	
19. In this example "Create a new form library" will be selected – then Next:	**Publishing Wizard** What do you want to do? ● Create a new form library ○ Update the form template in an existing form library Form library to update: | Name	Description
Customized Reports	This Document library has the tem....
Documents	This system library was created by....
Form Templates	This library contains administrator-....
Images	This system library was created by....
KMO_DOCS	
Pages	This system library was created by....
Site Assets	Use this library to store files which....
Site Collection Documents	This system library was created by....
Site Collection Images	This system library was created by.... | < Back Next > Cancel
20. A name "Test Forms" was entered and Next selected:	**Publishing Wizard** Type a name and description for this form library. Name: Test Forms Description: < Back Next > Cancel

21. Select Next as in this example we will not be adding columns or parameters to SharePoint sites and Outlook folders:	
22. Verify information – then select Publish:	
23. The wizard will run through and create connections as needed	

24. When completed make the desired selection and click Close when desired:	**Publishing Wizard** Your form template was published successfully. Form Library: Test Forms Location: http://pi-w7-oneillcm/Test Forms/ Server Type: InfoPath Forms Services Security Level: Domain ☐ Send the form to e-mail recipients… ☐ Open this form library… Open this form in the browser < Back **Close** Cancel
25. In this example – "Open this form in the browser" was selected	Loading Form…
26. The form was then displayed for entering in data:	Edit Save Save As Close Paste Copy Cut Print Preview Commit Clipboard Views Test