

Crabby inFORMS you about InfoPath 2007

Applies to: Microsoft InfoPath 2007

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Crabby Office Lady

Microsoft Office InfoPath 2007 is a very cool program. Before I wrote this column, I wasn't so sure we could be friends. But now that I've had some time to delve into it, discover its secrets, and make use of its building blocks and converting capabilities, I can't believe we weren't best friends all along.

As some of you loyal readers may have noticed, for the past several months I've been writing exclusively about programs in the 2007 Microsoft Office system. I don't normally do this. I tend to be "version agnostic." This works well for me since the variety of people who read my column use a variety of versions of Office. In other words, I make it my business to try and please all of the people most of the time (you can stop your snickering now).

What is InfoPath and why you should care

This week's column is about InfoPath 2007, the Microsoft Office program that allows you to create and use electronic forms. Examples are time sheets, performance reviews, expense reports, and any other type of form that requires entering a good deal of information. What separates InfoPath from, say, a Microsoft Office Word form, is that with the former you can gather the data for the form from an external data source, such as a Microsoft Office Excel spreadsheet, a database, or a Web service. Then you can upload the form — or just save it — to a destination like a Microsoft Windows SharePoint Services Web site. In other words, it's *beefy* (or ...*tofu-ee*, for you vegetarians).

Crabby's top 5 new/improved features of InfoPath 2007

We here in the Microsoft Office group use InfoPath 2007 for a variety of things, so I've gotten to know it a little bit. Although there are more than five new (or improved) features, these are the ones I picked to highlight for you. As always, you can check the **See also** box at the top of this column for more resources and information.

Browser-based forms

Right, so it's all well and good if you've created this amazing form for your teams to fill out, but what if you're ahead of the curve? What if you're the only one who has InfoPath installed? Bummer, dude.

But no, there's hope — in the form of InfoPath Forms Services.

Your form-filler-outers no longer need to have InfoPath installed in order to fill out forms. InfoPath Forms Services renders your beautifully crafted InfoPath forms into browser-based forms that have all the benefits you've built into the original form, including data validation and calculations — without having to wait for updates or long downloads. (Yes, people, I know; sometimes it takes a while to install certain products ...)

And have we limited this capability to Windows Internet Explorer? We certainly have not. To accommodate as many people as possible, we've (I say "we've," as if I had something to do with it) made it so folks using Safari, Netscape, Mozilla Firefox, and Internet Explorer browsers can

access and complete your forms. And the same holds true for mobile devices with HTML-based browsers. How's that for making everyone happy?

According to my inside source, veteran writer Anneliese Wirth, this was the #1 request from customers, "since this opens up a plethora of 'beyond the firewall' scenarios." In other words, you can distribute your forms to people both inside and outside your firewall. (Isn't "Beyond the Firewall" a movie? If not, maybe it should be ... perhaps starring Anneliese and me as computing firefighters.)

Complete InfoPath forms inside Outlook e-mail messages

With InfoPath e-mail forms, you can view, store, and manage forms just as you would anything else in Microsoft Office Outlook 2007. This just streamlines everything even more because you don't have to open InfoPath in order to open, fill out, and submit the form. If you get a form, you just fill it out and send it like any other e-mail message.

There are many things you can do with these two chummy programs: You can share data (such as your weekly status report), and you can collect data (such as the expense reports from your team). In fact, in Outlook 2007 there is a new folder — kind of like a Search Folder — called an InfoPath Forms folder that will store collections of related forms.

You can also merge data from many forms into one. For example, you gather up all the expense reports people on your team have submitted to you from that little trip you all took to Vegas and submit it to your manager (or not).

And if you're very fancy and organized, you can even export data from the new Forms folder in Outlook 2007 to an Excel spreadsheet.

Most everyone is comfortable and familiar with Outlook; InfoPath is still sort of new (the first iteration came out with Office 2003), but using it in a simple e-mail message may just get your people excited about it.

Convert Word documents and Excel spreadsheets

You know all those Word documents and Excel spreadsheets that you tried to make into forms before you were savvy to InfoPath? Well, the days of cutting-and-pasting or even recreating your forms (and banging your fist on the table, gnashing your teeth, and starting over) are long gone.

Using the Import Wizard in InfoPath, you can convert all those documents and spreadsheets by using the InfoPath Design Checker, a sort of style baby-sitter that checks and rechecks each field and table in your form and lets you know (not too sternly) when you need to insert the proper InfoPath control as a replacement. Now you have structure, dahling; now your forms make *sense* to us, they *speak* to us.

Template parts

You know how you sometimes need the same sorts of things such as formatting, controls, and even data validation on a lot (if not all) the forms you create? Rather than reinvent the wheel each time you sit down to make a new form, InfoPath now offers reusable "building blocks" for libraries of related form templates. You can simply insert entire sections of forms that you use frequently and even apply predefined data connections instead of wracking your brain trying to remember how all those connections connected ...

In fact, if you're in the IT world, you can create an entire library of parts and connections to maintain control over the information that your people's forms have access to (not that you're being controlling or anything ...).

PDF and XPS compatibility

Once again, a much requested feature. With the addition of a free add-in, you can create a Portable Document Format file (PDF) or XML Paper Specification (XPS) version of your completed InfoPath form for archival and records management.

Both XPS and PDF formats are great because they ensure that when you save an InfoPath form (or any other file of an Office program that supports PDF and XPS), your formatting is preserved and you can share it (online, in e-mail, or printed), knowing that it can't easily be changed or copied.

Final words about InfoPath 2007

InfoPath is a fairly new Office baby; it was first released with Office 2003. But because of the ways we can really listen to what our customers want, we were able to make this current version of InfoPath better than its first iteration. You keep letting us know what you like — or don't like — and we'll keep working to make things easier and better for you.

"I dreamed a thousand new paths ... I awoke and walked my old one." — Chinese proverb

About the author

[Annik Stahl](#), the Crabby Office Lady columnist, takes all of your complaints, compliments, and knee-jerk reactions to heart. Therefore, she graciously asks that you let her know whether this column was useful to you — or not — by entering your feedback using the **Did this article help you?** feedback tool below. And remember: If you don't vote, you can't complain.