

Gather Information Using Forms

With InfoPath Forms Services and browser-compatible forms, you can fill out Microsoft Office InfoPath 2007 forms by using a Web browser instead of (or in addition to) the Office InfoPath 2007 client program. This allows much wider access to forms than was possible with previous versions of Microsoft Office InfoPath. InfoPath Forms Services is part of Microsoft Office SharePoint Server 2007.

For example, Adventure Works uses InfoPath Forms Services to allow users and administrators to store and manage InfoPath form templates. In Marketing, Ray publishes a user form template to his team site so that the people in his department can file their trip reports. Lori in Human Resources deploys an administrator-approved form template that all employees in the company use to fill out their annual performance reviews.

About InfoPath form templates

InfoPath is a program that uses open XML standards to provide users with a flexible yet structured way to gather data. Because InfoPath is built on XML standards, the data that is collected by using InfoPath forms can be reused throughout an organization. For example, the data that is saved in an expense report form can be accessed and displayed on a Web page that highlights the budget trends for a department.

When a form designer creates a new InfoPath form, the designer actually creates what is known as a form template. A form template defines the data structure, appearance, and behavior of the forms that users fill out. Think of a form template as a blueprint — the starting point that enables users to create new forms that use and store data in the same way. Because a form template must be available before you can fill out a form, form templates must be deployed to a location where they can be accessed by users. Form templates are commonly deployed to locations on a company network such as shared folders, Web servers, or SharePoint libraries.

About browser-compatible forms

A browser-compatible form is a form designed in Office InfoPath 2007 by using a specific compatibility mode. When a browser-compatible form is published to a server running InfoPath Forms Services, users can display and fill out the form in a Web browser. They do not need to have Office InfoPath 2007 installed on their computers.

The following picture shows a browser-compatible form displayed in a Web browser.

EXPENSE REPORT

Type information about your work-related expenses in the fields below.

Report Date: 9/17/2007 Expense Code: 0000247 Start Date: 9/13/2007 End Date: 9/13/2007
 Business Purpose: Training

Employee Information

Name: Olivier Renaud Title: Business Analyst
 Department: Marketing ID Number: 00-OR123
 E-mail Address: olivier@adventure-works01.com

Manager Information

Name: Connie Vrettos E-mail Address: connie@adventure-works01.com

Itemized Expenses

Date	Description	Category	Cost
9/13/2007	Training seminar	Fees or dues	150.00
Subtotal			150.00
Less cash advance			0.00
Total expenses			150.00

Add Expense

Item Details

All browser-compatible forms must be hosted on a server running InfoPath Forms Services.

The experience of filling out a form in a browser is similar to that of filling out a form in Office InfoPath 2007. Features such as data validation work in the browser without requiring interaction with the server. This means the browser doesn't need to reload the form each time the user interacts with it.

Typical deployment roles and scenarios

There are two deployment modes for form templates that are hosted on a server running InfoPath Forms Services: one for user form templates and one for administrator-approved form templates.

User form template A user form template is a form template that contains only declarative functionality, such as conditional formatting, but does not contain managed code. User form templates run under the Domain security level. User form templates can be deployed by anyone with permission to create libraries and lists.

Administrator-approved form template Administrator-approved form templates are form templates that contain managed code, require full trust, use an administrator-managed data connection, are enabled to be displayed on a mobile device, or must be widely deployed across a site collection. A farm administrator generally uploads and verifies an administrator-approved form template, although a form template designer can also verify the form template from within InfoPath. Either a site collection administrator or a farm administrator with site collection administrator permission can activate the form template.

The following table describes the two most common deployment scenarios and the role required for each.

Type	Scenario	Scope of deployment
User form template	An end-user with permission to create libraries and lists on a server running InfoPath Forms Services deploys a browser-compatible form template that contains declarative functionality such as conditional formatting.	<p>The form template is published to a document library or as a content type. This deployment method is best for form templates that do not have managed code and that have a limited scope of deployment, such as those that are meant to be used by employees in a single department.</p> <p>NOTE If a user form template needs to be made widely available, it can be deployed by using the same process that is used for an administrator-approved form template.</p>
Administrator-approved form template	A farm administrator deploys a full-trust or domain-trust browser-compatible form template that contains managed code, uses a data connection that is managed by an administrator, is mobile-enabled, or must be widely deployed across a site collection.	<p>The form template is verified and uploaded by a farm administrator, and then it is activated to a form template library for one or more site collections. Activation is the process that is used to turn features on or off in a site collection, or to make administrator-approved form templates available for use. This deployment method works best for form templates that need to be widely deployed for use by employees in many departments across an organization.</p> <p>NOTE A farm administrator must verify and upload an administrator-approved form template, but a site collection administrator can activate the form template after it has been uploaded.</p>