

# Getting Started with InfoPath 2007

*Division of Biomedical Informatics*

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# Getting Started

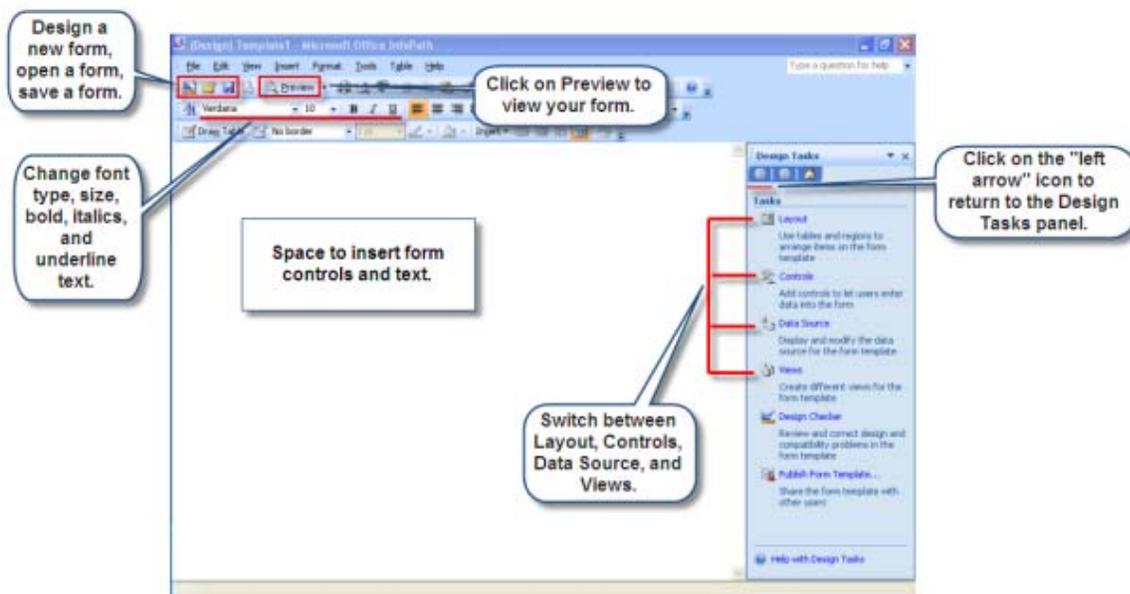
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## About InfoPath 2007

InfoPath® 2007 is a tool from Microsoft® used to create web-based forms for collecting information from users. You have complete control over the type of questions and user interactivity in your forms. Once your forms have been created and tested in InfoPath, you will send them to Biomedical Informatics (BMI). A BMI software developer will test your forms, connect your forms to a database, and publish your forms to a SharePoint server. You will then be able to start using your forms.

## Using the InfoPath interface

The balloons in the image below represent the most commonly used areas of the InfoPath interface. If you are new to InfoPath, you may want to familiarize yourself with these areas.



## Creating a new InfoPath form

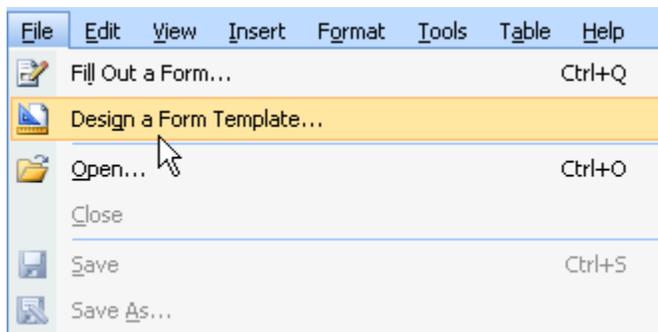
If you already have a Word document, you can import your document into InfoPath. See [Importing Word forms into InfoPath](#). Otherwise, follow the instructions below to create a new InfoPath form without an existing Word document.

1. Open InfoPath.

2. If you opened InfoPath for the first time and a “Getting Started” pop-up appeared on your screen, click on “Design a Form Template...” under “Design a form.”



If you previously opened InfoPath and a “Getting Started” pop-up does not appear on your screen, click on “Design a Form Template...” under “File.”



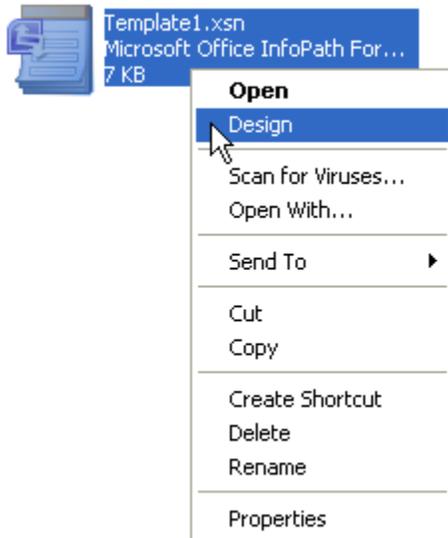
3. Click on the “Enable browser-compatible features only” check box.
4. Click OK.
5. Create your layout or add new controls to your form. See [Creating a layout](#) and [Inserting basic controls](#).

## Opening an InfoPath form

InfoPath forms can be opened in two modes: Design (for building and editing forms) and Preview (for testing forms).

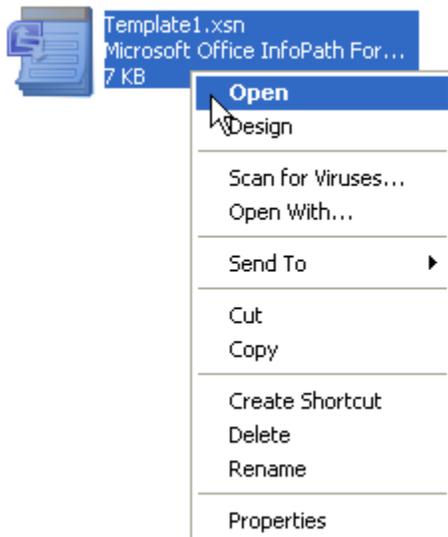
### Open in Design mode

Right-click on the InfoPath form you want to open in design mode and select “Design” from the menu. Your InfoPath form will open in design mode and be ready for you to make modifications.



### Open in Preview mode

Right-click on the InfoPath form you want to open in preview mode and select “Open” from the menu. Your InfoPath form will open in preview mode. You will not be able to modify the form.



## Importing Word forms into InfoPath

If you have previously created a form in Word, you can import your form into InfoPath. To get started, follow the instructions below.

1. Open InfoPath.
2. Click “Import a form...” under the “Design a form” section.



3. Click the “InfoPath importer for Word documents” option.
4. Click Next.
5. Click Browse.
6. Locate and click on the file name of the Word document you want to import into InfoPath.
7. Click Finish.

**Note:** Once your Word document has been imported into InfoPath, you should see a confirmation screen. In some cases, Word documents may be imported with errors. The confirmation screen will indicate if your Word document was imported with errors.

8. Click OK.
9. Click “Form Options...” under the “Tools” menu.
10. Click “Compatibility” in the “Category” list.

11. Click the “Design a form template that can be opened in a browser or InfoPath” check box.
12. Click OK.
13. Go through your form thoroughly, and make sure all your controls were imported properly. For example, sometimes check boxes are imported as option buttons, and vice versa.
14. Go to your data source, and rename any fields that were imported with generic names (e.g., “field1”) to something more descriptive (e.g., “patientName”). See [Naming your fields](#).
15. Complete all steps in the [Testing and Publishing](#) section of this document.

## Designing Forms

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### Creating a layout

InfoPath provides several predefined layouts using tables, which help you to organize and format your form.

To use any of the layout tables to help you design your form, open the Design Tasks pane on the right side of your InfoPath window if it isn’t open already, and click “Layout.”

Available options include:

- Table with Title
- One-Column Table
- Two-Column Table
- Three-Column Table
- Custom Table

Try each of the table options to see which ones best fit your desired layout. You can always modify and adjust tables once they have been created.

### Controls vs. fields

Throughout this document you will see references to controls and fields. Controls are the interactive elements of a form that enable users to enter data – for example, text boxes, list boxes, option buttons and check boxes. Each control you insert into your InfoPath form will have an associated field, or place where data captured by the control is stored. Each field’s name is important, as the more descriptive the name is, the easier it will be

to work with the data on an ongoing basis, including generating reports. See the [Naming your fields](#) section for more information about effectively naming fields.

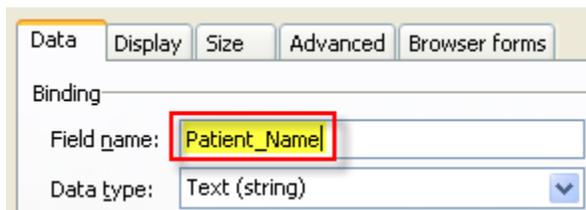
## Naming your fields

Each control you insert into your form is automatically bound to a field in the data source. By default, fields are consecutively named field1, field2, field3, and so on. As you add controls to your form, be sure to rename the associated field names to something more descriptive.

To rename a field, simply double-click the control to which it is bound:



Then go to “Field name” and type a name that is descriptive and does not include spaces or special characters – for example, “Patient\_Name” instead of “field1”:



## Inserting basic controls

Controls are form elements that enable users to enter and modify data. For example, if you want to collect a patient’s name, address, and contact information, you would use several text box controls. Or if you want to create a list of medications and have your user select one or multiple medications, you would use a list box. Some of the basic controls you can create include:

- Text boxes
- Rich text boxes
- Drop-down list boxes
- List boxes
- Date pickers
- Check boxes
- Option buttons
- Sections

To view available controls, click View/Design Task. Then click Controls. Or click on “Controls” in the Design Tasks pane on the right side of your InfoPath window.



## Text boxes

A text box is used to collect a single line of text – for example, a name, street address, city or ZIP.

Patient Name:

To insert a text box in your form:

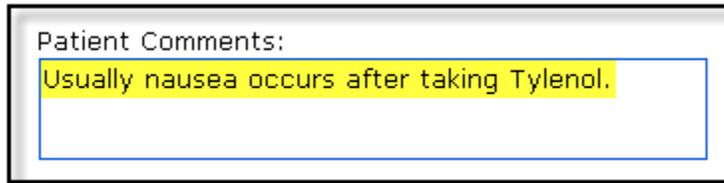
1. Place your cursor in your document where you want to create a new text box.

**Note:** Create any text you want to precede your new text box. For example, if you are creating a text box for a patient’s name, type “Patient Name:” and then insert your new text box.

2. With the “Controls” pane open on the right side of your InfoPath window, select “Text Box” in the “Standard” section.
3. Double-click the text box after it has been inserted into your document, go to “Field name,” and replace the default name with a descriptive name. See the [Naming your fields](#) section for more information about effectively naming fields.
4. To require users to enter something in the text box, select “Cannot be blank” under “Validation and Rules.”
5. Make changes to other properties if you wish. Consult the *Advanced Guide to InfoPath 2007* for help with Data Validation, Rules and other options.
6. Click OK to save your changes.
7. Test your document in Preview mode. See [Testing your InfoPath form](#).

## Rich text boxes

A rich text box provides a large area in your form where users can type longer comments or statements spanning multiple lines.



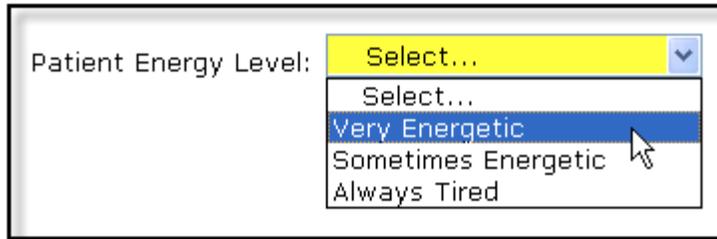
Patient Comments:  
Usually nausea occurs after taking Tylenol.

To insert a rich text box:

1. Place your cursor in your document where you want to create a new rich text box.  
  
**Note:** Create any text you want to precede your new rich text box. For example, if you are creating a rich text box for a patient's comments, type "Patient Comments:" and then insert your new rich text box.
2. With the "Controls" pane open on the right side of your InfoPath window, select "Rich Text Box" in the "Standard" section.
3. Double-click the rich text box after it has been inserted into your document, go to "Field name," and replace the default name with a descriptive name. See the [Naming your fields](#) section for more information about effectively naming fields.
4. To require users to enter something in the rich text box, select "Cannot be blank" under "Validation and Rules."
5. Make changes to other properties if you wish. Consult the *Advanced Guide to InfoPath 2007* for help with Data Validation, Rules and other options.
6. Click OK to save your changes.
7. Test your document in Preview mode. See [Testing your InfoPath form](#).

## Drop-down list boxes

A drop-down list box allows you to create a list of options, from which your users can select one option. Drop-down list boxes are suitable for lists containing many options. If you have a list with only a few options you may want to consider using a list box instead. See [List boxes](#).



To insert a drop-down list box:

1. Place your cursor in your document where you want to create a new drop-down list box.  
  
**Note:** Create any text you want to precede your new drop-down list box. For example, if you are creating a drop-down list box for a patient's energy level, type "Patient Energy Level:" and then insert your new drop-down list box.
2. With the "Controls" pane open on the right side of your InfoPath window, select "Drop-Down List Box" in the "Standard" section.
3. Double-click the drop-down list box after it has been inserted into your document.
4. Go to "Field name," and replace the default name with a descriptive name. See the [Naming your fields](#) section for more information about effectively naming fields.
5. To require users to select something in the drop-down list box, select "Cannot be blank" under "Validation and Rules."
6. Find the three columns (Value, Display Name, Default) listed toward the bottom. Click Add to the right of the three columns.
7. The "Add Choice" screen appears. Enter a value you want to use in the Value text box, and then click OK.
8. Repeat step 7 to add other choices to your drop-down list box.

For example, if you wanted to find out the energy level of a patient, you would follow the instructions below:

- a. Click Add.
- b. Enter "Very Energetic" as the Value and click OK.
- c. Click Add again.
- d. Enter "Somewhat Energetic" as the Value and click OK.
- e. Click Add again.
- f. Enter "Always Tired" as the Value and click OK.

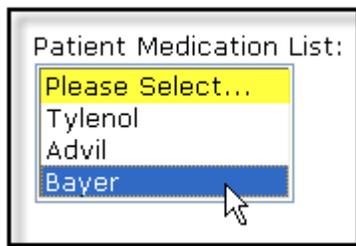
9. Make changes to other properties if you wish. Consult the *Advanced Guide to InfoPath 2007* for help with Data Validation, Rules and other options.
10. Click OK to save your changes.
11. Test your document in Preview mode. See [Testing your InfoPath form](#).

## Combo boxes

Combo boxes, which enable users to type values in addition to selecting values, are not available for web-based forms. If you see “Combo Box” in the “Standard” section of the Controls task pane, you need to set your form to be browser-compatible. See [Making your form browser-compatible](#).

## List boxes

A list box allows you to create a list of options, from which your users can select one option. List boxes differ from drop-down list boxes in that they display all available options at once. As a result, they are suitable only when you have a small number of available options (say, seven or less). Otherwise, you should use a drop-down list box. See [Drop-down list boxes](#).



To insert a list box:

1. Place your cursor in your document where you want to create a new list box.  
**Note:** Create any text you want to precede your new list box. For example, if you are creating a list box for a patient’s medication needs, type “Patient Medication List:” and then insert your new list box.
2. With the “Controls” pane open on the right side of your InfoPath window, select “List Box” in the “Standard” section.
3. Double-click the list box after it has been inserted into your document.
4. Go to “Field name,” and replace the default name with a descriptive name. See the [Naming your fields](#) section for more information about effectively naming fields.
5. To require users to select something in the list box, select “Cannot be blank” under “Validation and Rules.”

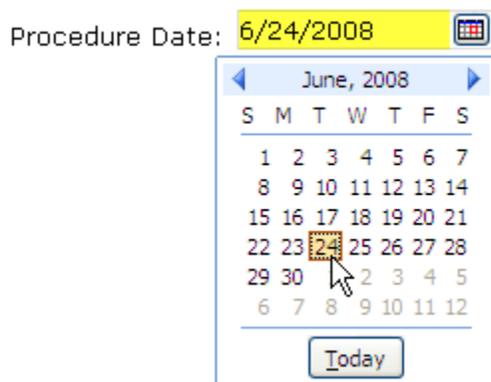
6. Find the three columns (Value, Display Name, Default) listed toward the bottom. Click Add to the right of the three columns.
7. The “Add Choice” screen appears. Enter a value you want to use in the Value text box, and then click OK.
8. Repeat 7 to add other choices to your combo box.

For example, if you wanted to construct a medication list, you would follow the instructions below:

- a. Click Add.
  - b. Enter “Tylenol” as the Value and click OK.
  - c. Click Add again.
  - d. Enter “Advil” as the Value and click OK.
  - e. Click Add again.
  - f. Enter “Bayer” as the Value and click OK.
9. Make changes to other properties if you wish. Consult the *Advanced Guide to InfoPath 2007* for help with Data Validation, Rules and other options.
  10. Click OK to save your changes.
  11. Test your document in Preview mode. See [Testing your InfoPath form](#).

## Date pickers

A date picker allows users to select a date from a pop-up calendar instead of typing a date manually.



To insert a date picker:

1. Place your cursor in your document where you want to create a new date picker.

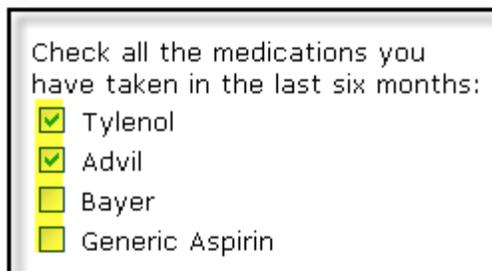
**Note:** Create any text you want to precede your new date picker. For example, if you are creating a date picker for a procedure, type “Procedure Date:” and then

insert your new date picker.

2. With the “Controls” pane open on the right side of your InfoPath window, select “Date Picker” in the “Standard” section.
3. Double-click the date picker after it has been inserted into your document.
4. Go to “Field name,” and replace the default name with a descriptive name. See the [Naming your fields](#) section for more information about effectively naming fields.
5. To require users to select a date, select “Cannot be blank” under “Validation and Rules.”
6. Make changes to other properties if you wish. Consult the *Advanced Guide to InfoPath 2007* for help with Data Validation, Rules and other options.
7. Click OK to save your changes.
8. Test your document in Preview mode. See [Testing your InfoPath form](#).

## Check boxes

Check boxes allow users to select one or more items in a group, or to indicate a yes/no response to a single item. If you require users to select only one item in a group, see [Option buttons](#).



Check all the medications you have taken in the last six months:

- Tylenol
- Advil
- Bayer
- Generic Aspirin

To insert a check box:

1. Place your cursor in your document where you want to create a new check box.
2. With the “Controls” pane open on the right side of your InfoPath window, select “Check Box” in the “Standard” section.
3. Each time you insert a check box, a default text description will be inserted to the right of your newly created check box. Highlight and rename the corresponding text according to your specific needs.

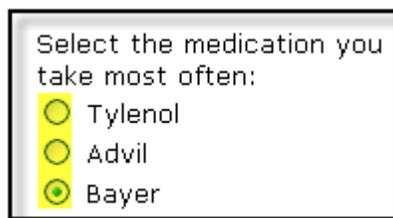
4. Double-click each check box, go to “Field name,” and replace the default name with a descriptive name. See the [Naming your fields](#) section for more information about effectively naming fields.

**Note:** In a group of related check boxes, each check box is bound to its own unique field.

5. Make changes to other properties if you wish. Consult the *Advanced Guide to InfoPath 2007* for help with Data Validation, Rules and other options.
6. Click OK to save your changes.
7. Test your document in Preview mode. See [Testing your InfoPath form](#).

## Option buttons

Option buttons allow users to select one item from a group. If you require users to select multiple options, see [Check boxes](#).



Select the medication you take most often:

- Tylenol
- Advil
- Bayer

To insert a group of option buttons:

1. Place your cursor in your document where you want to create a new group of option buttons.
2. With the “Controls” pane open on the right side of your InfoPath window, select “Option Button” in the “Standard” section.
3. A pop-up screen appears. By default, the setting shows “3” as the number of options to insert. You can enter a different number or use the up/down arrows to select a new number of options.
4. Each time you insert an option button, a default text description will be inserted to the right of your newly created option button. Highlight and rename the corresponding text according to your specific needs.
5. Double-click any of the option buttons, go to “Field name,” and replace the default name with a descriptive name. See the [Naming your fields](#) section for more information about effectively naming fields

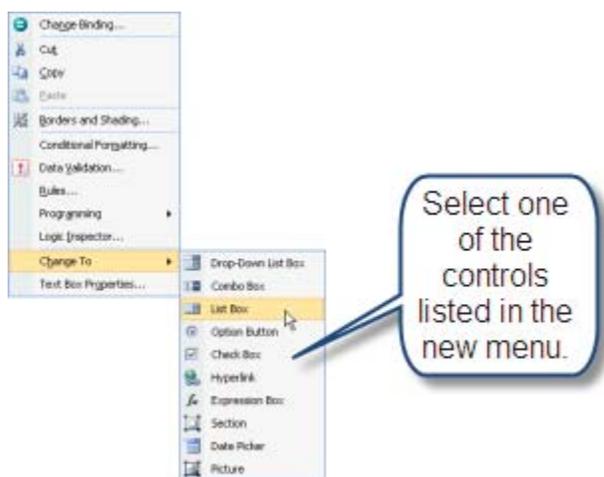
**Note:** All options in a group are bound to a single, common field.

6. Make changes to other properties if you wish. Consult the *Advanced Guide to InfoPath 2007* for help with Data Validation, Rules and other options.
7. Click OK to save your changes.
8. Test your document in Preview mode. See [Testing your InfoPath form](#).

## Changing one control type to another

You can change one control type to another without having to delete the control and insert a new one. For example, if you have a text box on your form and you want to change it to a list box, you can easily change the control with a few clicks. Follow the instructions below to learn how to change your controls.

1. Right-click on the control you want to change.
2. Select “Change to...” in the menu. A new menu will appear automatically.
3. Select the control type you want to change your current control to in the new menu.



Your control will automatically change to the new control you selected.

4. Configure your new control according to the type you selected. For example, if you changed a text box to a list box, you need to double-click on the new control and change the control's properties accordingly.

## Deleting a control

Sometimes you may want to delete a control from your form. Follow the instructions below to learn how to delete a control from your form.

**Note:** You must follow these instructions step-by-step in order to delete the control properly.

1. Place your cursor over the control you want to delete. The field name will appear, as highlighted in the following image. Make a note of the field name. You will need to reference the field name in a future step.



2. Right-click the control you want to delete and select “Cut” from the menu.
3. Click View/Data Source. Or click on “Data Source” in the Design Tasks pane on the right side of your InfoPath window.



4. Find the field name in the “Data source” list associated with the control you want to delete. Right-click and select “Delete” from the menu.
5. Click Yes.

## Grouping controls in a section

A section allows you to group controls. For example, you may group a patient’s name, address, phone number, and email address in one section, and then group a patient’s history, medication, or general comments in another section. Beyond keeping related controls neat and tidy, the advantage of using sections to group controls is that you might use conditional formatting to hide or show the entire group based on user input elsewhere on the form. See the *Advanced Guide to InfoPath 2007* for more information on using conditional formatting.

To insert a section:

1. Place your cursor in your document where you want to create a new section.

**Note:** Create any text you want to precede your new section. For example, if you are creating a Section for a patient's name, address, phone number, etc., type "Patient Contact Information:" and then insert your new Section.

2. With the "Controls" pane open on the right side of your InfoPath window, select "Section" in the "Standard" section.
3. You now can create new text boxes, combo boxes, drop-down list boxes, or other controls in the new section. Or you can highlight, cut, and paste your existing controls into the section.

## Testing and Publishing

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### Making your form browser-compatible

One of the most important features you need to enable is the browser compatibility feature. If you do not enable browser compatibility, your form will not work properly.

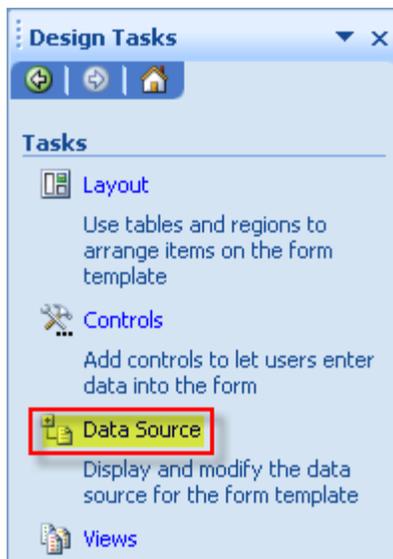
To make a form browser-compatible:

1. Click on "Form Options..." under "Tools."
2. Click on "Compatibility."
3. Click on the "Design a form template that can be opened in a browser or InfoPath" check box.
4. Click OK.

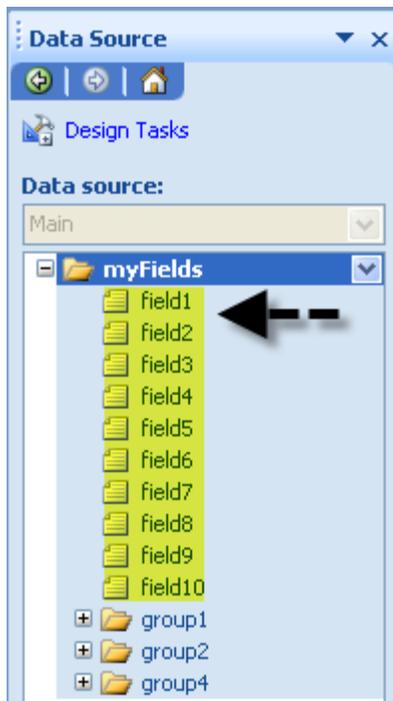
### Double-checking your field names

Naming your data source elements, or fields, is one of the most important steps you need to take prior to publishing your form. When your fields are named properly, your data can be retrieved faster and more efficiently, making it easier to browse data and generate reports. Before submitting your form for publication, you should double-check your field names as follows:

1. Click View/Data Source. Or click on "Data Source" in the Design Tasks pane on the right side of your InfoPath window.



2. Double-check to ensure that your data source does NOT contain non-descriptive field names such as those shown below:

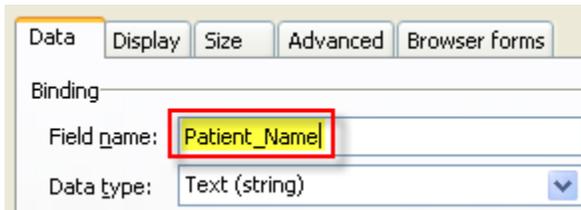


3. If it's necessary to rename any fields, you can do so by double-clicking either the field itself in the data source or the control with which the field is associated.

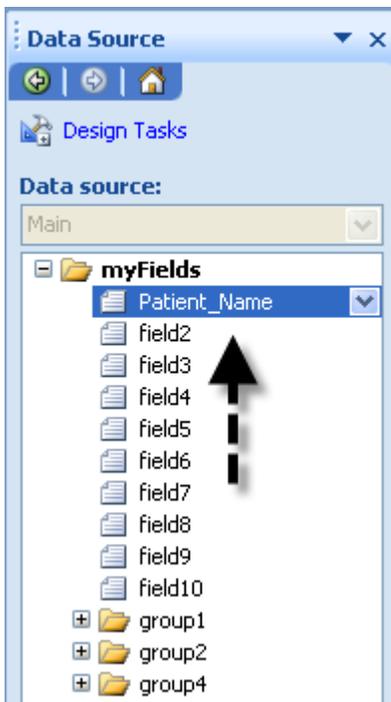
For example, let's say your form includes a text box to capture a patient's name, and the text box is bound to a field generically named "field1":

Patient Name:  field1

By double-clicking on the text-box, or by double-clicking on “field1” in the data source, you can give the field a more descriptive name - for example, “Patient\_Name”:



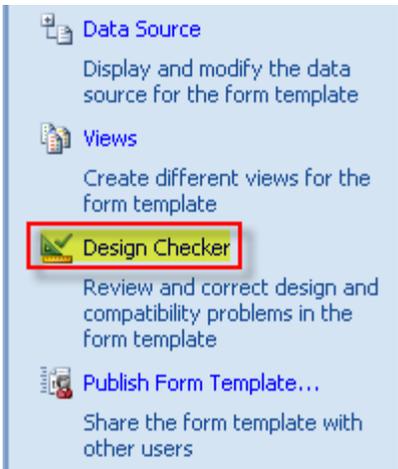
Once you click OK to save your changes, note how the data source changes, too:



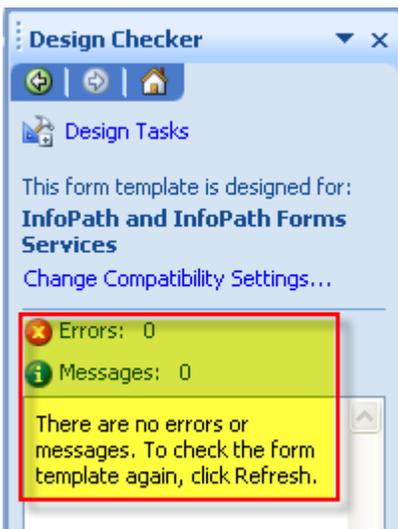
## Checking your form for errors

Before you can publish your form, you need to run Design Checker to check for possible errors.

1. Open your form.
2. Select Tools/Design Checker. Or click on “Design Checker” in the Design Tasks view on the right side of your InfoPath window.



3. When Design Checker has completed checking your form, it will display errors and messages related to your form, if applicable.



If Design Checker displays zero “Errors” and zero “Messages,” you can move on to [Publishing your InfoPath form](#).

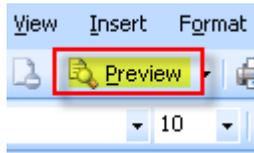
If Design Check displays one or more errors, please try to correct them before submitting your form. One of the most common errors occurs when a control is not bound to a field. This may happen if you, say, accidentally delete a field from the data source. To correct this error, simply right-click the control, select “Change Binding” and select the field in the data source to which the control should be bound. If the field is not listed in the data source, you can right-click and select “Add” to create a new field.

## Testing your InfoPath form

As you modify or create new sections of your form, you can test your changes by using the Preview mode. Follow the instructions below to get started.

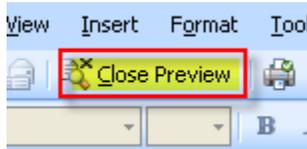
**Note:** You cannot make design changes while in Preview mode.

1. Open your form.
2. Select File/Preview/Form. (Shortcut: Press Ctrl + Shift + B on your keyboard.) You can also click on the Preview button to view your form in Preview mode.



**Note:** Preview mode will open in a new window.

3. When you are finished viewing your form in Preview mode, you can close the form by selecting File/Close Preview. Or click on the “Close Preview” button.



## Publication checklist

Before submitting your forms for publication, please verify that your forms meet the following conditions:

- All forms are browser-compatible (see [Making your form browser-compatible](#)).
- All fields have descriptive names (see [Naming your fields](#) and [Double-checking your field names](#)).
- Design Checker has been run, and all errors are resolved (see [Checking your form for errors](#)).
- All forms have been tested and previewed (see [Testing your InfoPath form](#)).

## Submitting your form for publication

After you have created and finalized your form **AND** have completed the publication checklist (see [Publication checklist](#)), you can submit your form to BMI for publishing. A BMI software developer will check your form, connect it to a database, and then publish it to a SharePoint server.