



METAOPTION

An Article on InfoPath
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Core vision led to the creation of InfoPath.

Workers everywhere generate content that contains valuable data every day—in e-mail messages, status reports, and the like.

But they also spend an inordinate amount of time searching for that same information when they need to reuse it. When, and if, they find it, they often spend even more time rekeying the relevant data into another document. Why hasn't technology made it easier to gather and integrate all this content we generate?

The problem is that many of the documents we use for everyday business processes aren't amenable to automation.

While data capture and validation has been a core component of traditional forms for some time, the technology needed to automatically gather, say, valuable data from a text document hasn't been available.

Interesting and unique about InfoPath is

InfoPath lets organizations design and edit what people in my field call "semi structured" documents, or documents that have regions of meaning, in the same way that columns in a database have meaning.

While the program provides great design and editing capabilities for traditional forms such as purchase orders and equipment requests, what's innovative is that InfoPath squarely targets information that historically has been more difficult to capture, such as business-critical data contained in sales reports, inventory updates, project memos, travel itineraries, and performance reviews.

The XML community has been trying to build a tool like InfoPath for a long time.

With XML, documents can become a source of information as rich as a database, enabling search, processing, and reuse.

- InfoPath has been built from the ground up to understand XML.
- The underlying structure of the information in an InfoPath template is described using a **schema**.
- **A schema** describes how the data is constructed, in the same way that a blueprint describes how a building is constructed.
- Because InfoPath understands XML, customers can define their own business-specific schema using the latest XML standards.

Overview:

With Office InfoPath 2007, you can create and deploy electronic forms solutions to gather information efficiently and reliably. You can also use the InfoPath Forms Services capabilities in Microsoft Office SharePoint® Server 2007 to extend your business processes beyond your corporate firewall to deliver forms as Microsoft Office Outlook® e-mail messages, Web browser forms, or forms for mobile devices.

InfoPath Client

The InfoPath client is very straightforward—opening it presents you with a wizard that allows you to select from a number of forms in a gallery of samples, from a list of recently used forms, and from an online library of forms. In addition, you can design and publish forms, guided by wizards in the client.

With Office InfoPath 2007, you can gather information more efficiently using electronic forms. These forms are easy to send to participants, and they help reduce redundant data entry and improve the quality of the data collected. InfoPath forms solutions help you reach more users by providing an easy form fill-in experience across Web browsers, e-mail messages, and mobile devices. Office InfoPath 2007 helps you get the right information the first time by providing real-time validation, pre populated fields, and connections to important sources of information.

Complete InfoPath Forms Using Web Browsers and Mobile Devices

With Office InfoPath 2007 and the InfoPath Forms Services capabilities of Office SharePoint Server 2007, you can administer and deploy your business forms beyond the corporate firewall.

InfoPath Forms Services can render InfoPath form templates as browser-based forms that do not require a local installation of InfoPath. In fact, browser forms offered by InfoPath Forms Services require no software download whatsoever. Your external users gain the benefits you have built into your InfoPath forms—

including data validation, calculations, and repeating and optional sections—without having to wait for application updates or lengthy downloads. To help ensure the broadest possible reach, your external users can complete Web-enabled InfoPath forms using

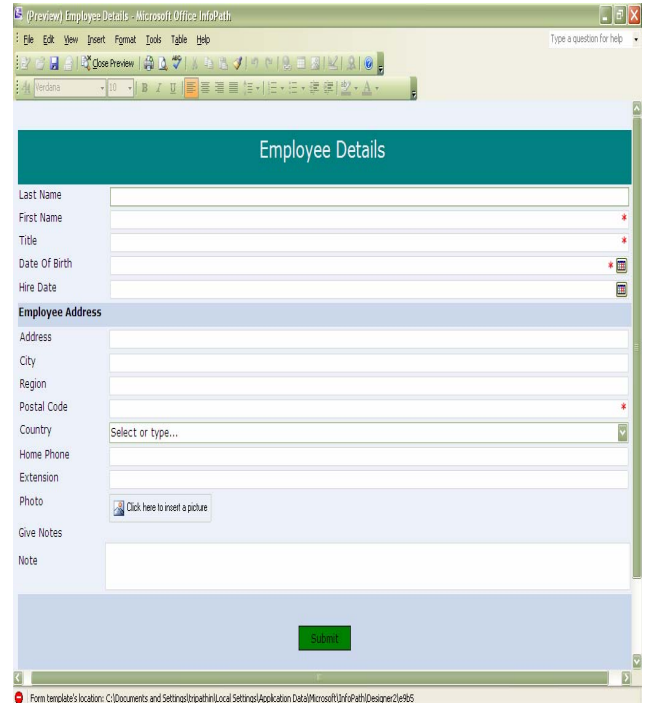
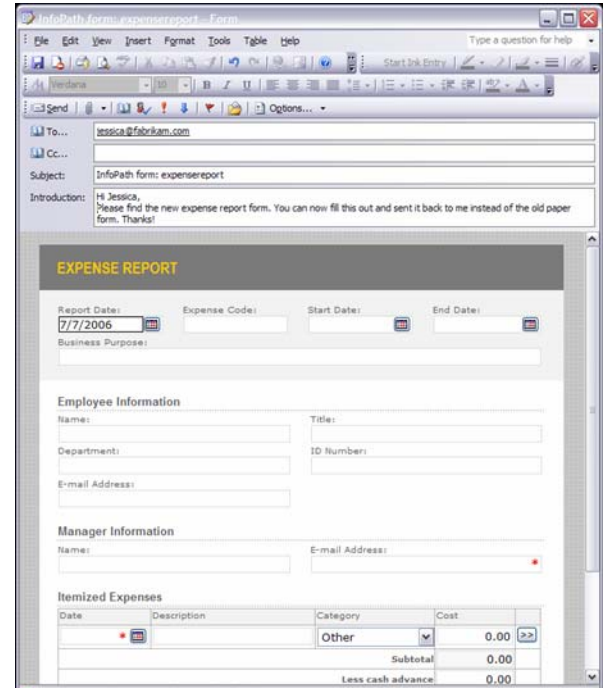


Figure1: InfoPath forms can be deployed in a variety of ways, including to Web browsers and mobile devices.

Complete InfoPath Forms inside Outlook E-Mail Messages

Office Outlook 2007 can host InfoPath forms, so organizations can send forms and gather information more efficiently than ever. By deploying InfoPath forms as Outlook e-mail messages, you can enable people throughout your organization to complete forms quickly and easily using the familiar Outlook environment.



The screenshot shows an Outlook email window with the subject 'InfoPath form: expensereport'. The email body contains an 'EXPENSE REPORT' form with the following fields:

- Report Dates: 7/7/2006
- Expense Code: [empty]
- Start Date: [empty]
- End Date: [empty]
- Business Purpose: [empty]
- Employee Information:
 - Name: [empty]
 - Title: [empty]
 - Department: [empty]
 - ID Number: [empty]
 - E-mail Address: [empty]
- Manager Information:
 - Name: [empty]
 - E-mail Address: [empty]
- Itemized Expenses table:

Date	Description	Category	Cost
		Other	0.00
Subtotal			0.00
Less cash advance			0.00

Figure 2: InfoPath forms can be deployed as e-mail messages, enabling users to fill out and submit the form simply by replying to the message.

Working with InfoPath in a MOSS 2007 Environment

When talking about Microsoft Office SharePoint Server 2007 and Office 2007, the conversation will most definitely include InfoPath 2007. This product is a rich client desktop application that is part of the Office system product suite. We will discuss site content types, which enable you to add more than one InfoPath form template to a SharePoint form library. Form libraries are used to store XML-based business forms, such as InfoPath forms.

Centralize Forms Management and Control

InfoPath Forms Services of Microsoft Office SharePoint Server 2007 provides you with a centralized forms solutions repository so you can maintain forms easily. Your administrators centrally control forms access and deployment across the organization, rather than deploying multiple servers to specific departments.

Business users can design and deploy forms, but your administrators retain control over who is permitted to publish forms to the server. With the InfoPath Forms Services technology, your organization can develop and deliver forms-based services more quickly and cost-effectively. Using InfoPath Forms Services, you can easily upgrade forms that are already in place. With side-by-side form upgrades and automatic template version management, your administrators can deploy new versions of forms with no downtime and help ensure everyone is working with the correct version of the form.

Making Forms More Manageable

InfoPath Forms Services is fully integrated with Office SharePoint Server 2007 to deliver a solution that connects forms-driven business processes to the built-in workflow, records management, single sign-on architecture, and more. Including InfoPath Forms Services within an Office SharePoint Server 2007 deployment helps ensure organizations can centralize the management of electronic forms into the same infrastructure that supports document and Web content management, as well as the organization's portal solution.

Use Office SharePoint Server 2007 to Automate Forms-Driven Processes

When combined with Office SharePoint Server 2007, InfoPath forms can be deployed as part of an automated business process, including routing and notification based on information within the form. Information rights management, information management policies, and access rights can be assigned to any form template to help organizations ensure that the appropriate information can travel along with the form.

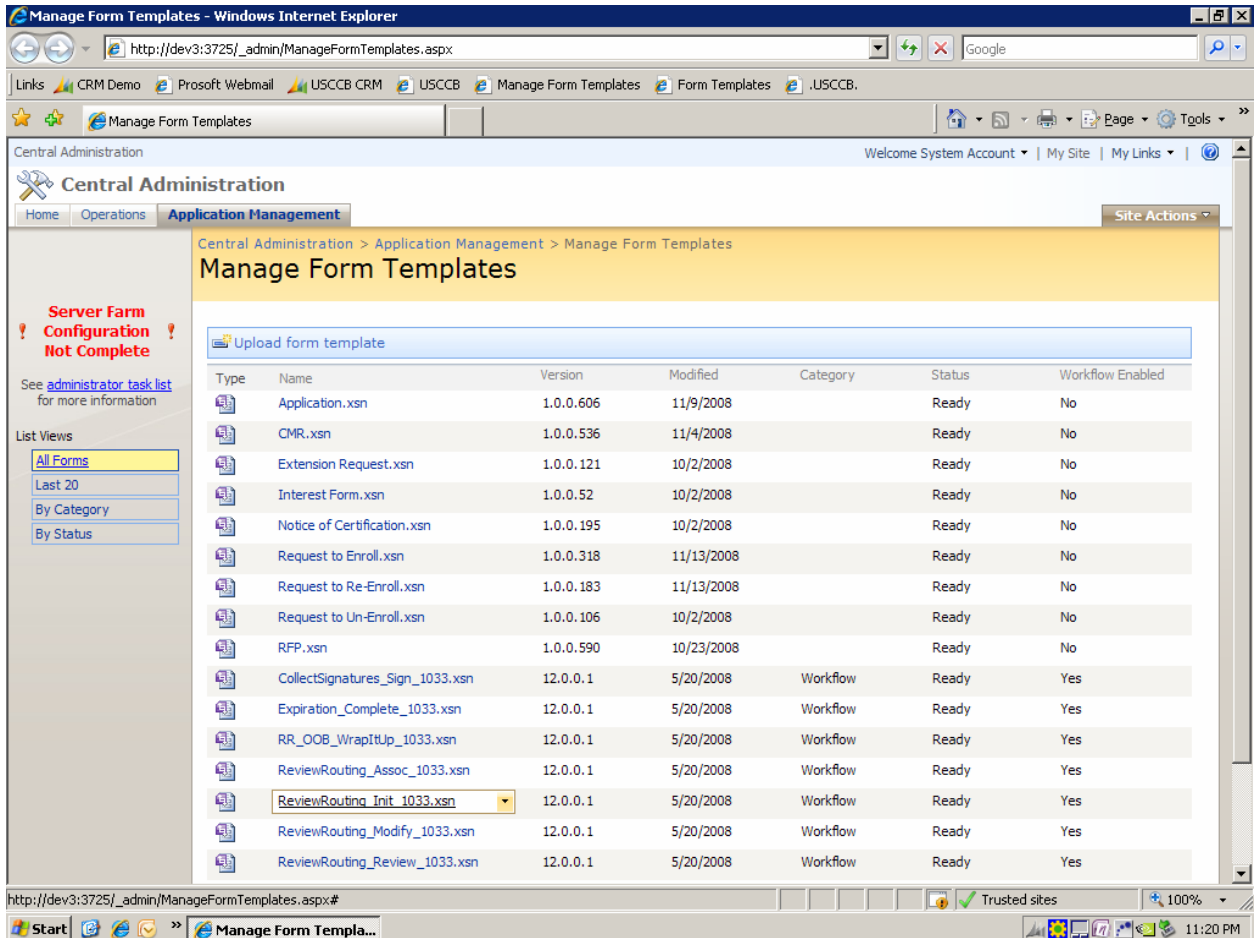


Figure 3: InfoPath Forms Services are integrated with Office SharePoint Server 2007 to provide a comprehensive management solution for electronic forms, documents, Web content, and more.

Because Office InfoPath 2007 and InfoPath Forms Services are fully integrated with the workflow capability of Microsoft Office SharePoint Server 2007, you don't need anything else to enable workflow for your electronic forms. The same workflow engine used for document reviews, content approvals, and other processes can be used for InfoPath forms, which makes managing business processes much simpler when you use Office SharePoint Server 2007.

Summary

Office InfoPath 2007 helps you and your organization gather information more efficiently and effectively than ever. It provides you with the tools you need to create and deploy effective business forms solutions. Office InfoPath 2007 also enables form developers of any skill level to build efficiency and reliability into

their data-gathering processes. In concert with InfoPath Forms Services, it can extend your business processes to virtually any user, anywhere—improving collaboration and decision-making to positively impact your business. Office InfoPath 2007 builds on the powerful information-gathering capabilities of InfoPath 2003. It combines the familiar Microsoft Office system environment with a rich set of tools that enable you to build forms solutions that validate data, integrate into business systems, and guide users through an easy form completion experience. Using InfoPath Forms Services, you can extend your business processes beyond the corporate firewall to provide electronic forms for use in the Microsoft Office system, Web browsers, and mobile devices. Built on industry standards like XML Schema, XSLT, and others, InfoPath provides an easy way to standardize data collection processes across your entire organization.

Finally, tight integration between Office InfoPath 2007 and the other programs included in the 2007 release of the Microsoft Office system—including Office Outlook 2007, Office Word 2007, Office Excel 2007, and Office SharePoint Server 2007—offers new ways to capture and consume information. Working together, these tools help break down the barriers that impede the flow of information, so you can get the information you need, in the form you need it, when and where you need it.

Resources

For more information about Office InfoPath 2007 and the Microsoft Office system, please visit <http://www.microsoft.com/office/infopath>.