

THE EXPERT'S VOICE®

Pro InfoPath 2007

*Learn how to use InfoPath to provide solutions
for small and enterprise environments*

Philo Janus

"Pro InfoPath 2007 is an excellent book for developers trying to learn the scope and range of application/ forms that can be built with Microsoft Office InfoPath 2007. InfoPath is now in its 2nd generation and it enables the creation of rich desktop and web forms using XML technologies and allows gathering of structured, business-critical information. Together with Microsoft Windows SharePoint Server 2007, InfoPath allows built-in integration with back-end processes, databases, and work flow, and provides developers with rich tools to build enterprise-wide forms solutions.

During the development and stabilization phase of InfoPath 2007, Philo worked closely with the product team to test features, provide feedback on scenarios, and to build and apply solutions for the government and public sector. He has poured all that experience in an engaging manner into this book—a great read for every developer trying to learn InfoPath."

—Kamaljit Bath, Principal Program Manager Lead, Microsoft Office InfoPath and Forms Services

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*For my father,
Lt. Col. Victor F Janus (1922–2006).
I miss you, Dad.*

Contents at a Glance

About the Author	xiii
About the Technical Reviewer.....	xv
Acknowledgments	xvii
Introduction.....	xix
CHAPTER 1 Introducing InfoPath	1
CHAPTER 2 Tour of the InfoPath Client	13
CHAPTER 3 Tour of the InfoPath Designer	31
CHAPTER 4 InfoPath Views	65
CHAPTER 5 Publishing InfoPath Forms	81
CHAPTER 6 SharePoint Integration	101
CHAPTER 7 Data Connections.....	123
CHAPTER 8 Advanced InfoPath Topics.....	145
CHAPTER 9 Writing Code in InfoPath	167
CHAPTER 10 InfoPath Add-Ins and Task Panes.....	189
CHAPTER 11 Workflow.....	207
APPENDIX A Understanding the Manifest.....	239
APPENDIX B Web Services.....	243
APPENDIX C Using XMLSpy with InfoPath	261
INDEX	273

Contents

About the Author	xiii
About the Technical Reviewer	xv
Acknowledgments	xvii
Introduction	xix
CHAPTER 1 Introducing InfoPath	1
InfoPath	1
InfoPath As a Smart Client	6
E-forms	8
InfoPath for Forms Solutions	9
Summary	11
CHAPTER 2 Tour of the InfoPath Client	13
Form Templates vs. Form Data	13
InfoPath and Form Maintenance	14
Tour of the InfoPath Client	14
Rich Text Fields	17
Repeating and Optional Sections	17
File and Picture Controls (and Ink)	20
Views	21
Errors	21
Digitally Signing a Form	22
Form Settings	24
Submitting Forms	25
Exporting Forms	26
Digital Rights Management	26
Browser Forms	26
E-mailing Forms	28
Forms for Metadata	28
Summary	29

CHAPTER 3	Tour of the InfoPath Designer	31
	Introduction to InfoPath Form Design	31
	Form Design Philosophy	31
	Creating a New Form	32
	Types of InfoPath Forms	34
	The Design Tasks Pane	35
	Form Layout	35
	Controls	40
	Template Parts	62
	Data Source	62
	Design Checker	63
	Publishing the Form Template	63
	Summary	63
CHAPTER 4	InfoPath Views	65
	InfoPath Views in Detail	65
	Form Paging	66
	Alternative Views	69
	View Options	72
	Exporting Views	80
	Changing Views	80
	Summary	80
CHAPTER 5	Publishing InfoPath Forms	81
	Publishing Overview	81
	Form Security	82
	Xcopy Publishing	84
	Network Location	84
	Via E-mail	87
	SharePoint	93
	Publishing to a SharePoint Form Library	94
	Publishing to a SharePoint Site As a Content Type	98
	Installable Form Template	99
	Summary	99

CHAPTER 6	SharePoint Integration	101
	SharePoint Form Libraries	102
	Check-In/Check-Out	103
	Item-Level Security	104
	Versioning	104
	Alerts	105
	Form Property Promotion/Demotion	105
	InfoPath Browser-Capable Forms	106
	Creating a Browser-Capable Form	109
	Views	110
	Forcing Forms to Open in a Browser	111
	Browser-Specific Options	112
	Saving and Submitting	113
	E-mail Enabling Document Libraries	116
	SharePoint Workflow	117
	Windows Workflow Foundation	117
	Designing a Workflow	118
	InfoPath and SharePoint Workflows	118
	Summary	121
CHAPTER 7	Data Connections	123
	Overview	123
	Data Connections	125
	Data Source	127
	SQL Server	128
	Web Services	135
	E-mail	139
	Hosting Environment	141
	SharePoint	141
	Lists	142
	Data Connection Library (DCL)	143
	Single Sign-On	144
	Summary	144
CHAPTER 8	Advanced InfoPath Topics	145
	Importing Word/Excel Forms	146
	Importing Forms	147
	Word Forms	148
	Excel Forms	150

Cascading Drop-Down Lists	153
Content Types	154
Custom Task Panes	161
Policies	161
Labels	162
Auditing	162
Expiration	163
Barcodes	164
Merging Forms	164
Summary	165

■ CHAPTER 9 Writing Code in InfoPath

Visual Studio Tools for Applications (VSTA)	167
InfoPath and Visual Studio	169
Understanding the InfoPath Object Model	172
Application	173
Windows/ActiveWindow	173
XmlFormCollection/XmlForm Class	173
XPathNavigator	175
InfoPath Form Events	176
Manipulating the Form	177
Optional Sections	178
Repeating Sections/Tables	182
File Attachments	182
Working with Data Connections	185
Browser-Capable Forms	186
Security	188
Summary	188

■ CHAPTER 10 InfoPath Add-Ins and Task Panes

Writing an InfoPath Add-In	191
Creating and Using a Custom Task Pane	199
Hosting InfoPath Forms	202
Hosting an InfoPath Form in a Windows Form	203
Hosting an InfoPath Form in an ASP.NET Form	206
Summary	206

CHAPTER 11	Workflow	207
	Windows Workflow Foundation (WF)	207
	SharePoint Designer and Workflow	208
	Designing Workflow in Visual Studio	215
	Creating a Workflow Project	218
	Creating the Form Library	222
	Creating an InfoPath Workflow Initiation Form	223
	Creating an InfoPath Task Editing Form	225
	Wiring Up the Workflow	227
	Deploying the Workflow	232
	Summary	237
APPENDIX A	Understanding the Manifest	239
	xDocument Class	240
	Package	240
	DateAdapters	240
	FileNew	241
	Repacakaging an XSN	241
	InfoPath SDK	242
APPENDIX B	Web Services	243
	Simple Object Access Protocol (SOAP)	244
	Web Service Description Language (WSDL)	245
	Writing .NET Web Services Suitable for InfoPath	245
	Web Services Enhancements (WSE)	255
	Windows Communication Foundation (WCF)	256
	Universal Discovery, Description, and Integration (UDDI)	256
	Web Services and SQL Server	257
	Summary	259
APPENDIX C	Using XMLSpy with InfoPath	261
	About XMLSpy	261
	XMLSpy and XML Files	263
	Schemas	267
	Using Projects	270
INDEX		273

About the Author

■ **PHILO JANUS** graduated from the US Naval Academy with a BSEE in 1989 to face a challenging career in the US Navy. After driving an aircraft carrier around the Pacific Ocean and a guided missile frigate through both the Suez and Panama Canals, and serving in the US Embassy in Cairo, a small altercation between his bicycle and an auto indicated a change of career (some would say that landing on his head in that accident would explain many things).

Philo's software development career started with building a training and budgeting application in Access 2.0 in 1995. Since then, he's worked with Oracle, Visual Basic, SQL Server, and .NET, building applications for federal agencies, commercial firms, and conglomerates. In 2003, he joined Microsoft as a technology specialist evangelizing Office as a development platform.

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Introduction

Electronic forms are the bane of developers everywhere. Laying out a form is generally designing a business process, so while it may seem like a fairly straightforward thing to do (I need this data, so I'll put these controls on the form), you start running into issues of validation, presentation, showing and hiding optional fields, and so on. InfoPath is a great tool exactly because the designer is so straightforward that the developer can have the business stakeholders design their own forms (or design the forms in conjunction with them in a joint-analysis design session).

InfoPath 2007 has evolved far beyond that initial vision. With the addition of browser-compatible forms, developers can design a form once and reuse it as a rich desktop form or a browser-based form, and even embed the form in their own solutions. And since InfoPath is completely XML-based, they're not locking into some proprietary stack—an InfoPath form could be the front end for a Java process, for example.

A problem with the growth of features and capabilities is that there are a lot more aspects of InfoPath to understand. With InfoPath 2003, you had to understand the InfoPath client and some basic SharePoint integration. InfoPath 2007 brings in not only browser capabilities, but also deeper integration with SharePoint, integration with Windows Workflow Foundation (WF) as both a tool and a client, and a host of additional programmatic interfaces.

This book is intended to introduce a power user or developer to InfoPath as a platform for developing form templates. While InfoPath is easy to use once you're used to it, there are sharp edges and dark nooks and crannies that can be a bit frustrating. Having gone through these travails myself, I felt the need to share the lessons I've learned with other "newbies." Hopefully, you'll be able to read through it in a weekend to understand what you can do with InfoPath, but also use it as a reference to work from as you implement a solution.

The first parts of the book are oriented toward any InfoPath power user—they show you how to use the controls, views, validation, and other user interface features without writing any code. Later chapters start delving into code and the Visual Studio environment, and are intended for experienced developers with a background in C#.

You do not need to have worked with InfoPath, SharePoint, or WF previously—I introduce and explain the concepts you need to understand how they interact. (Hopefully, after reading this book, you'll be hungry to learn more about SharePoint and WF development!)

To start off, you can get by with just the InfoPath client. As you dig into SharePoint integration, you will need access to a SharePoint server (either Windows SharePoint Services or Microsoft Office SharePoint Server). And of course, to work through the sections covering code, you'll need Visual Studio 2005.

I hope you enjoy reading this book as much as I've enjoyed writing it. If you have questions or feedback, please feel free to contact me at phil089@msn.com.

