Microsoft®
Office
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Microsoft InfoPath 2010
Product Guide

Table of Contents

Microsoft InfoPath 2010: An Overview

Welcome to Microsoft® InfoPath® 2010, a forms-creation and data-gathering tool that organizations can use to streamline business processes. InfoPath 2010 is designed for both advanced business users and IT pros and developers, depending on the type of forms-based solution a user or organization wants to create. Users of all levels, however, can fill out forms.

For Advanced Business Users

With InfoPath 2010, you can design sophisticated electronic forms to quickly and cost-effectively gather information required for an immediate business need. You can customize forms with features such as calculated fields, setting default values, conditional formatting, and ScreenTips, all without writing code. If your organization also uses Microsoft SharePoint® Server 2010, you can create these forms for information stored in SharePoint lists. Storing information in a shared location (such as a SharePoint list) makes it easy for team members to use the information, facilitating collaboration.

In addition, with improvements to the form-filling experience in InfoPath Filler and interoperability with other Microsoft Office 2010 applications, including Microsoft Outlook® and Microsoft SharePoint® Workspace (formerly known as Microsoft Office Groove®), you can give users more options when filling out forms, including completion online, offline, and on mobile devices. You can also use InfoPath 2010 to customize document information panels in Microsoft Office Word, Microsoft PowerPoint®, and Microsoft Excel® applications to collect metadata about documents.

For IT Pros and Developers

InfoPath 2010 provides a complete environment for the design, development, deployment, hosting (together with SharePoint Server), collection, aggregation, and integration of electronic forms. Built from the ground up using World Wide Web Consortium (W3C) XML recommendations, InfoPath is designed to work with your existing infrastructure and process management environment.

For advanced forms for departmental and enterprise business processes, you can create composite applications and workflow sequences with InfoPath 2010 and SharePoint Server 2010—using little or no code. InfoPath 2010 can be fully integrated with SharePoint Server 2010.

You can connect InfoPath forms with other data sources and line-of-business systems such as Microsoft SQL Server®, Oracle, and SAP using SharePoint Server 2010 Business Connectivity Services, Web services, and SOAP (Simple Object Access Protocol) and REST (representational state transfer) Web services. Your InfoPath solutions can also be portable using SharePoint Foundation 2010 solutions file (.wsp) and SharePoint site template (.stp) formats, so you can easily move the application from site to site and server to server. In addition, InfoPath now stores URLs as relative (instead of absolute) to enable portability.

These are just a few examples of InfoPath 2010 and SharePoint Server 2010 capabilities to help you create powerful forms-driven business process automation solutions.

InfoPath in Action

InfoPath in Action sections in this guide illustrate fictional scenarios of InfoPath 2010 in everyday business use. The first InfoPath in Action shows how a marketing professional used InfoPath 2010 to create a professional-looking form to gather data for a partner event. The second InfoPath in Action illustrates how a developer created a help desk application for employees and IT support technicians to use.

Quickly Design Forms with Easy-to-Use Tools

InfoPath 2010 makes it easier than ever to design and deploy sophisticated forms quickly and efficiently.

You can create specialized forms to support informal business processes using the familiar functionality of the Microsoft Office system, such as fonts, styles, spelling checker, table design, and clip art. The familiar tools and environment help minimize training time and speed forms creation.

Create Forms Faster with the Ribbon

The Ribbon, introduced in many 2007 Microsoft Office system applications, is included in InfoPath 2010. Based on extensive usability data and recent advancements in hardware and software, the Ribbon is designed to make it easier for you to find and use the full range of features in Office applications—and get the results you want faster. Instead of traditional menus and toolbars that might require several steps to complete a task, the Ribbon displays the commands in a tab structure, organized by tasks that are related to a certain activity.
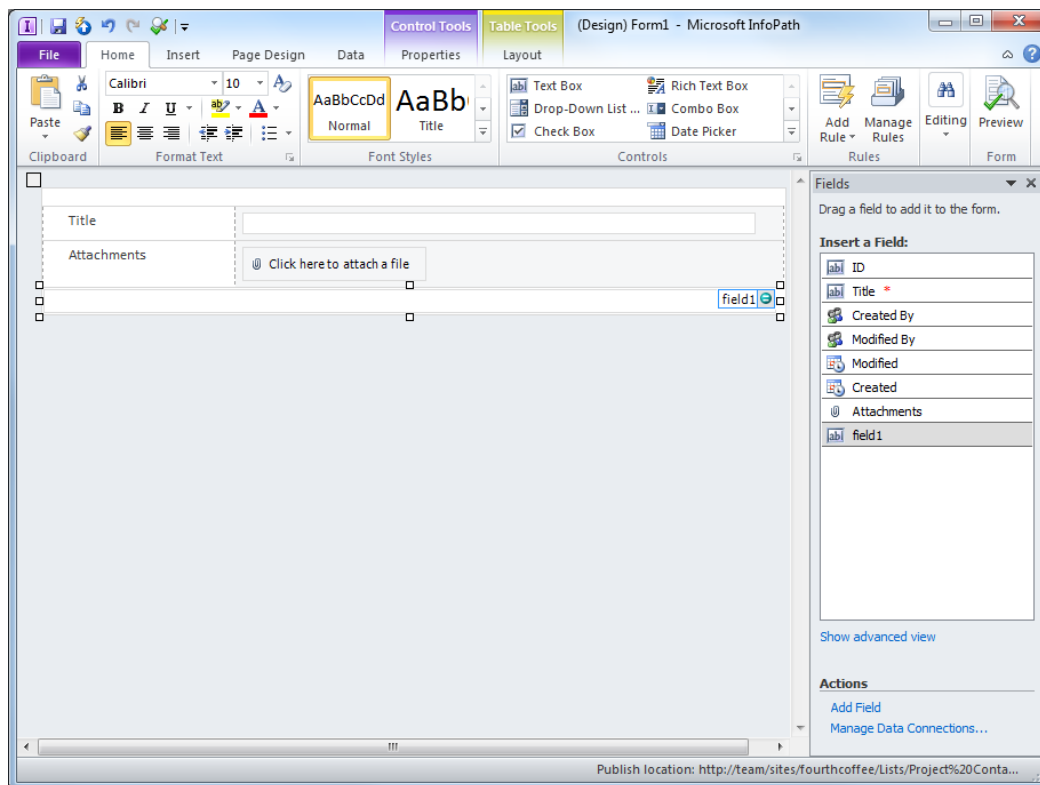
Figure 1 - Create forms more efficiently with the Ribbon.

In addition, InfoPath 2010 provides a cleaner and simpler UI for people who are designing and filling out forms. For example, forms designers can work more efficiently using the Form Control Gallery and Style Gallery.

With InfoPath Filler, people who are filling out forms have a simple and easy-to-use UI and can choose to save a draft, save a local copy, or save as a PDF and have a local record of the form.

Customize Forms Easily with Declarative Logic and Layout

Other features to help you quickly create forms include pre-built layout sections, out-of-the-box rules, improved rules management, and varied styles. In addition, InfoPath Designer now includes a number of different form templates, so you don't need to define all parts of the form from scratch.

Laying out your form and making it look more attractive is now easier with InfoPath 2010. You can insert a page layout to give your form structure and then insert some section layouts into

the page layout to start building your form. You have several options to choose from to ensure that you'll get a look that suits the type of form you're building. When you're done with the structure, you can choose a color scheme and layout style available on the Page Design tab.

With out-of-the-box rules, or quick rules, you can add validation, formatting, or actions to a form with just a couple of clicks, and without any code. Quick rules are sensitive to your context—you will get only options that make sense for the type of field you're assigning rules to. If you are working on a text field, you will able to compare the contents of that field to specific text or to the contents of another field before choosing what action you want to take. If you are working on a date field, you can create a warning to appear if a user fills in a date that is outside a specified range. Your action choices include switching views, calculating and assigning values, applying formatting, and validating data.

For example, if you were creating a form for coworkers to nominate customers or partners for a case study, you may find a number of quick rules useful. You could make a warning appear if the coworker has picked a date for the study to start that is too early to be realistic. You may want to have only certain detail fields show depending on whether the coworker nominates a partner versus a customer for the study. In this case, you can show and hide an entire section of the form.

Once you have added some quick rules, you can modify them using the new Rules Manager task pane or add more complex new rules. In InfoPath 2010, this process is more efficient and flexible with fewer dialog boxes.

Accomplish your tasks faster with Microsoft Office Backstage view

On the left edge of the Ribbon you see the File tab. Just click that tab for an all-access pass that makes it easier than ever to manage your forms and customize your InfoPath 2010 experience.

The new Backstage view replaces the traditional File menu to provide a single location for your form management tasks. For example:

- Choose a form template to quickly create a form.

- Check the design of a form for errors.

- Configure submit and other advanced forms options.

- Find publishing options for publishing your form to a SharePoint library, e-mail recipient list, and more.
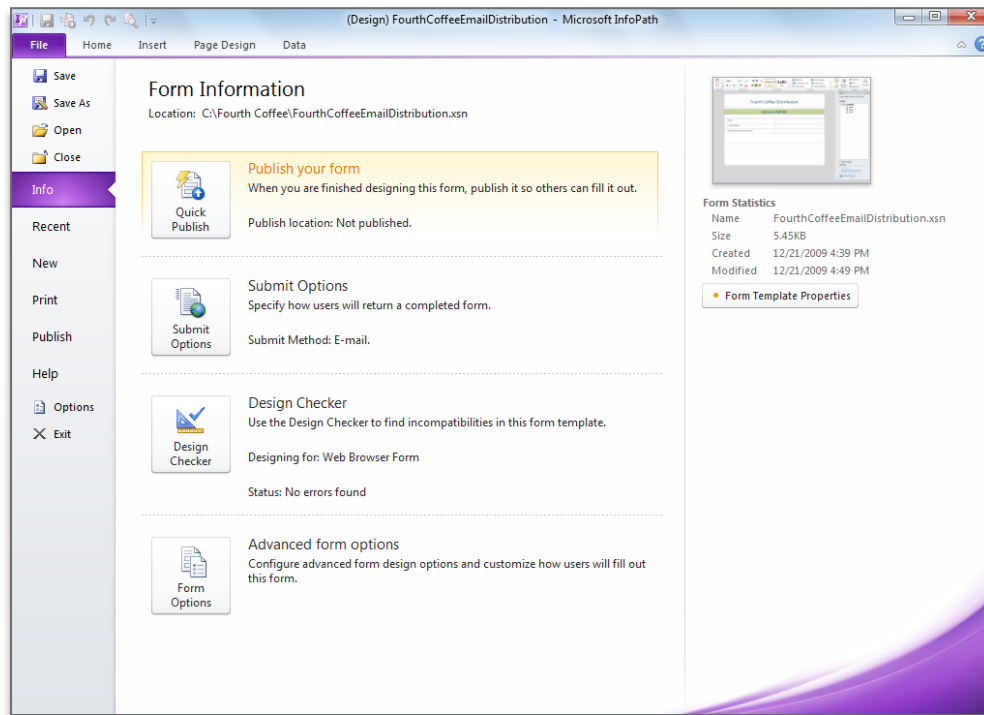
Figure 2 - Accomplish tasks faster with Backstage view.

Make Forms for SharePoint Lists

With InfoPath 2010, you can create attractive forms with a click of a button based on SharePoint regular or external lists. In a browser, simply navigate to a SharePoint list, and on the SharePoint Ribbon under List Tools, choose to use InfoPath to customize the form. You can automatically generate a form with all the SharePoint list fields and then customize it, reducing the time to create a form. Publish the form with one click and the form will be active on the SharePoint list and ready to use.
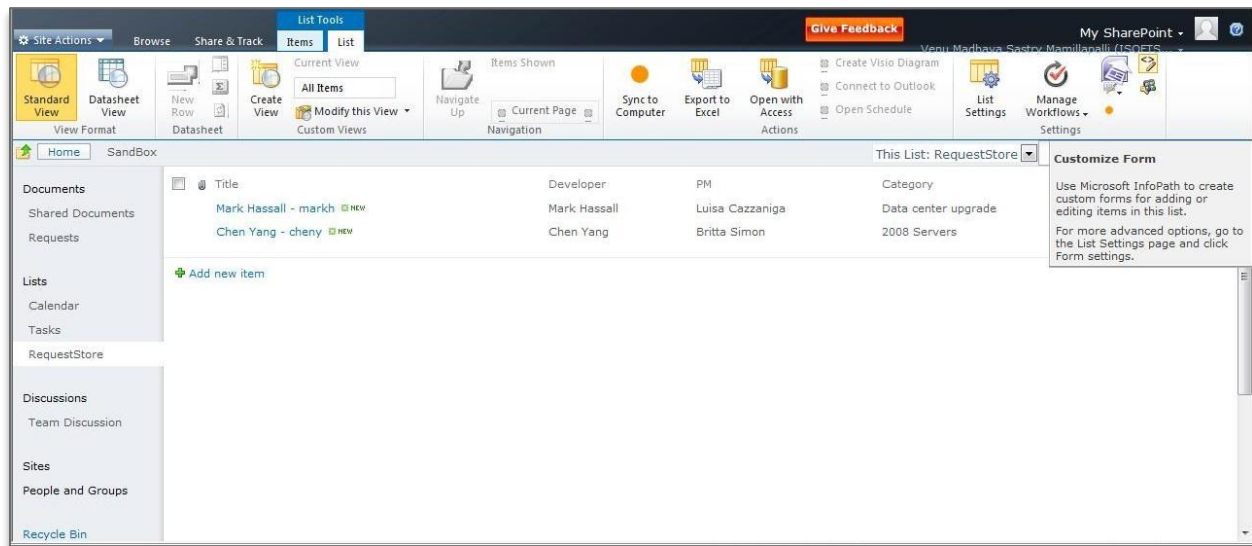
Figure 3 - Customize forms for SharePoint lists.

Use Microsoft SharePoint Workspace 2010 for Offline Completion

With InfoPath 2010 and Microsoft SharePoint® Workspace 2010, business process participants can work the way they want—online or offline. SharePoint Workspace 2010 interoperates with InfoPath forms which makes it easy to take a SharePoint list or library with InfoPath forms offline. Information entered in the forms will be automatically synchronized once the participant is back online, helping people be productive regardless of their connection.

InfoPath 2010 in Action

Business challenge: Britta Simon, a marketing manager at Litware, Inc., needs to develop case studies about the products she is responsible for at Litware. She contacts account and partner managers within Litware to gather nominations for potential case study participants. The information she needs to collect includes customer or partner name, potential solution description, desired start date, type of the organization (partner or customer), and products used. To contact potential participants directly, she also needs their contact names, e-mail addresses, and phone numbers.

Solution: Britta designs a professional-looking InfoPath form for account and partner managers to access on a SharePoint site. Without writing code or needing IT help, she lays out the form and creates fields for customer or partner name, potential solution description, desired start date, type of the organization, and product names used by those partners or customers. She also includes fields for partner/customer contact name, e-mail, and phone number. She creates a rule regarding the study start date; if the date chosen is within two weeks of the current date, a warning appears that the start date must be more than two weeks in the future.

She sends the URL for the site to Litware account and partner managers. When they fill out the forms, the data will be stored in a SharePoint list that is easily available to other members of her marketing team.
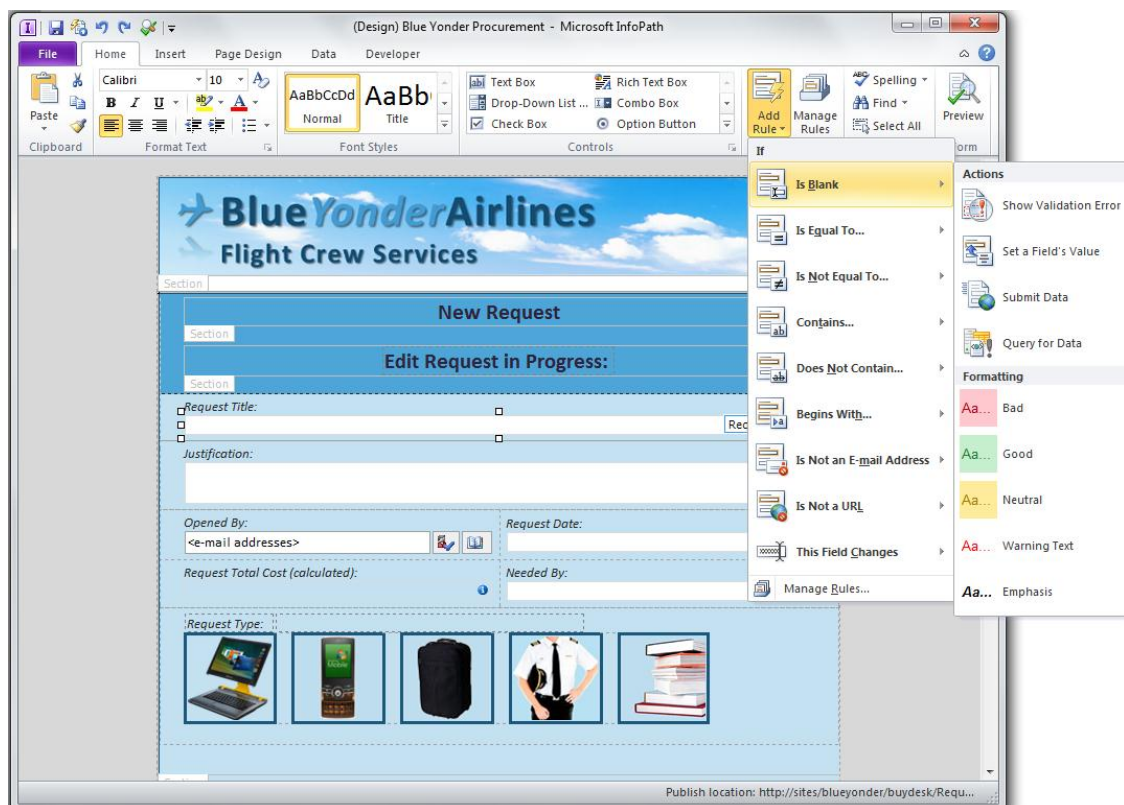
Figure 4 - Quickly create attractive forms to gather information.

Create SharePoint Applications

With InfoPath 2010, SharePoint Server 2010, and SharePoint Designer 2010, you can create SharePoint applications. InfoPath 2010 can be integrated with SharePoint Server 2010 to create forms-driven processes relying on SharePoint Server built-in workflow capabilities. In addition, with SharePoint Server 2010, you can manage InfoPath 2010 forms in the same context as your SharePoint Server infrastructure.

Create Two Types of SharePoint Applications

SharePoint workflow applications are useful for both document solutions and form solutions. With document solutions, you can:

- Add workflow process to existing documents in a document library.

- Create custom InfoPath forms that drive workflow initialization and association and workflow tasks.

With form solutions, you can:

- Start with one or more InfoPath forms for SharePoint lists or document libraries. You can quickly customize a form, such as changing the layout or adding data validation. (For an illustration, see the earlier InfoPath in Action scenario.)

- Add workflow and other components to the application.

Often, forms are embedded in Web Parts and are used as sections of the portal pages powered by SharePoint Server. These solutions can be integrated with line-of-business systems using external lists.

Build Modular, Extensible, and Portable SharePoint Applications

For use at the departmental or enterprise level, SharePoint applications can be built using little or no code with SharePoint Designer and InfoPath. These solutions are modular, extensible, and portable:

Modular—Build your solution from an existing SharePoint list or document library.

Extensible—Easily add capabilities by creating additional modules or by adding components written using custom code (for example, Web services, event handlers, and custom workflow actions).

Portable—Quickly package your InfoPath solution application using the SharePoint Foundation solutions file (.wsp) and SharePoint site template (.stp) formats and easily move the application from site to site and server to server.
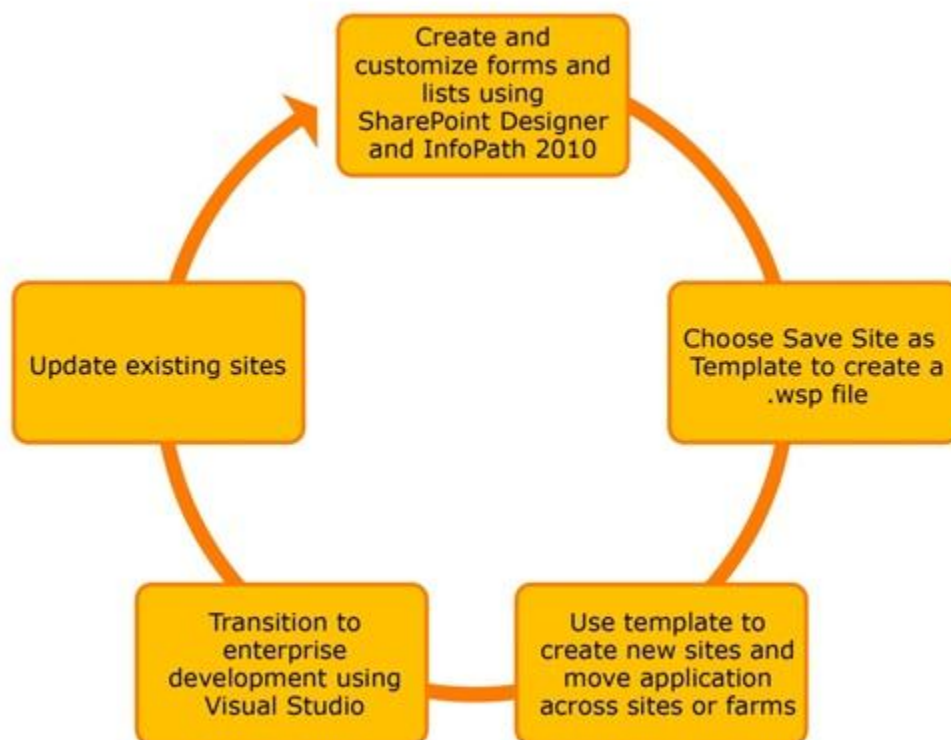
Figure 5 - Streamline the application life cycle with portable form solutions.

When combined with SharePoint Server and SharePoint Designer, InfoPath forms can be deployed as part of an automated business process, including workflow, such as routing and notification capabilities based on information within the form. 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.

Take Advantage of Server Improvements

Take advantage of improvements in SharePoint Server 2010 for additional benefits in creating and using InfoPath forms.

Enjoy More Powerful Web Browser Forms

Improved parity between InfoPath 2010 client forms and InfoPath forms in SharePoint Server 2010 ensures greater consistency for users who are filling out forms. For example, functionality available in both environments includes:

- Bulleted, numbered, and plain lists

- Multiple selection list boxes

- Combo boxes

- Picture buttons

- Hyperlink capabilities

- Choice group and section

- Filtering functionality

- Date and time controls

- People pickers

Manage Forms More Easily on the Server

From a health and monitoring perspective, InfoPath forms can be monitored as a true component of SharePoint Server 2010. New SharePoint Maintenance Engine Rules ensure that InfoPath forms are correctly configured in their SharePoint Server farms. InfoPath forms can also interoperate with the SharePoint Server Management Pack to provide extra health checks for forms and reporting on issues with individual form templates.

SharePoint Server 2010 also provides a hosting environment for centralized management of electronic forms for the entire organization, so you can gain better control over your forms solutions. By using the SharePoint Server 2010 unified portal, forms, and content management solution for your organization, you can manage electronic forms in the same context as other critical business functions. In addition, forms capabilities and configuration can be shared by

multiple tenants in the same farm. Form settings can either be managed centrally by the farm administrator or delegated to the tenant administrators for more granular control.
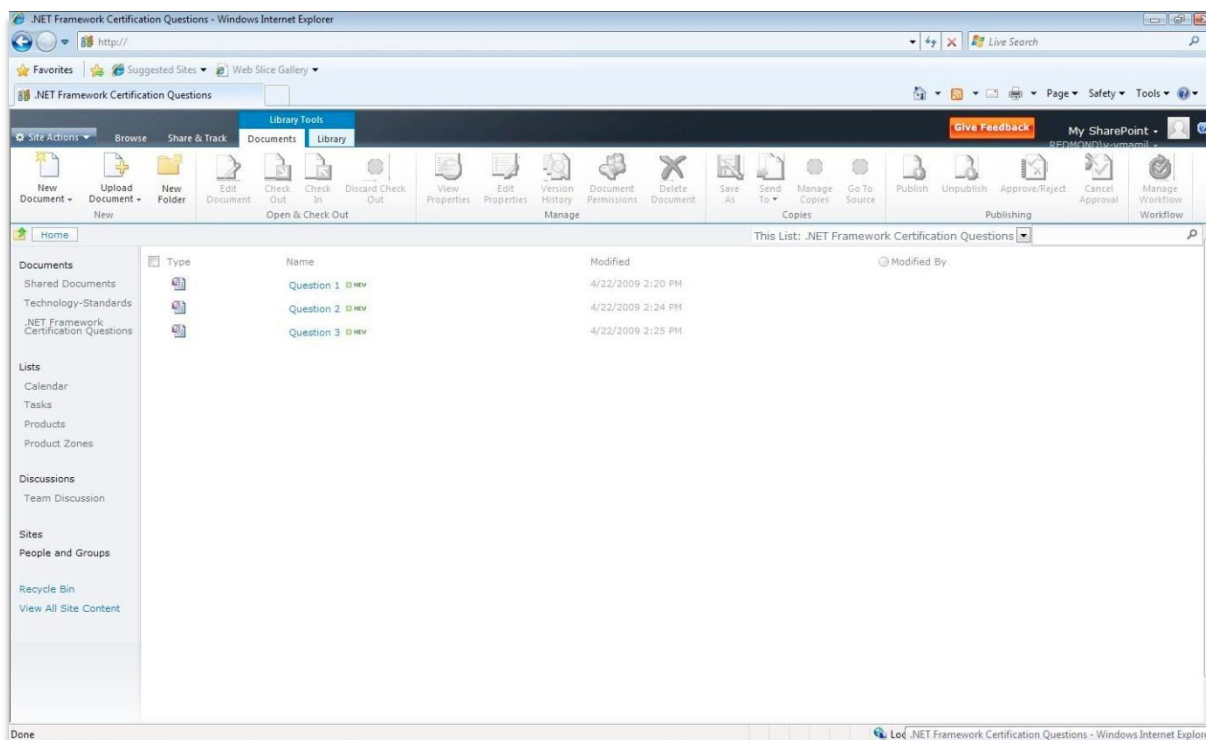
Figure 6 - Manage forms using SharePoint Server 2010.

You can also manage InfoPath forms using Windows PowerShell™ command line shell and scripting language, which is included in SharePoint Server 2010. With Windows PowerShell, you have flexibility in scripting common tasks and the ability to access configuration settings that are not exposed through the administrator user interface.

Build Advanced Forms and Connect Forms to Line-of-Business Systems

If your organization requires additional forms functionality to support managing data for business processes, you can create composite applications using InfoPath 2010. In addition, for users of SAP, Oracle, and other common line-of-business applications, InfoPath and its seamless interoperation with SharePoint Server 2010 Business Connectivity Services deliver a valuable tool for bringing together users in your organization with the important information stored in your line-of-business systems.

Enhance Forms with Code

Although you can customize many aspects of InfoPath forms without writing code, you can also enhance InfoPath forms with code if declarative logic does not meet the needs for implementing your solution functionality.

Use Visual Studio Tools for Applications

You can enhance InfoPath 2010 forms using Microsoft Visual Studio® Tools for Applications (VSTA), which ships with InfoPath 2010. VSTA provides a light-weight version of the Visual Studio Integrated Development Environment. You can use VSTA to write managed code in C# or VB.NET. The code is then embedded in the InfoPath form template (.xsn file).

For example, if you want to include the ability for calculating interest in a form, you can write managed code in the form itself and InfoPath Filler or InfoPath Forms Services will run this code when the form is opened or edited.

Use SharePoint Server Sandboxed Solutions

With InfoPath 2010, users can now deploy InfoPath forms with a single click, with managed code running as part of a SharePoint Server Sandboxed solution. With SharePoint Server Sandboxed solutions, form designers can upload solutions with code to their SharePoint sites, within a limited set of permissions. A resource quota limits excessive resource usage. The site collection administrator remains in control and makes trust decisions about the solution. The farm administrator can be hands-off.

Connect Forms with Line-of-Business Systems

SharePoint Server 2010 offers an extensible architecture for managing user access to data connections and systems. This simplifies the development of complex forms with access to multiple data sources and minimizes IT support headaches.

InfoPath 2010 interoperates with the Business Connectivity Services (BCS) of SharePoint Server 2010. BCS enhances Microsoft Office applications and SharePoint platform capabilities with out-of-box features, services, and tools that streamline development of solutions with connections between external data and services. BCS can connect to external data sources in multiple ways. BCS can consume and interact with data in a relational database via an ADO.NET data provider. It can also connect to any standard Web Service over SOAP 1.2 protocol, described by a WSDL 1.1 or 2.0. BCS can consume and interact with a Windows Communication Foundation service as well as Microsoft .NET custom code compiled by a developer of a solution. Also, InfoPath 2010

now supports getting XML data from REST Web services. REST Web Services use input parameters that are passed in through a URL. Form designers can now change the URL parameters dynamically in the InfoPath form without any code using rules to get desired data from the REST Web Service.

Using SharePoint Designer, you can build custom InfoPath forms to create, read, update, and delete data in an external list, and these form customizations are preserved when the external list is taken offline using SharePoint Workspace. You can also add business logic with code behind it that works on the server and the client in SharePoint Workspace.

Easily Integrate Forms Using Industry Standards

Use InfoPath 2010 standards support to implement InfoPath forms solutions without having to replace your organization's current infrastructure. InfoPath 2010 offers extensive support for industry standards such as XML Schema, XSLT, and SOAP and Web services to help you easily integrate your electronic forms into your current IT infrastructure.

Make Browser Forms Standards Conform

InfoPath 2010 forms on SharePoint Server 2010 are now compliant with Web Content Accessibility Guidelines 2.0 (WCAG 2.0) AA to help you create forms that are accessible to users with disabilities. In addition, forms powered by SharePoint Server 2010 are now fully XHTML 1.0 compliant.

Provide Enhanced Information Security and Integrity with Digital Signatures

InfoPath 2010 supports Cryptography Next Generation (CNG) digitally signed content. To help you ensure the integrity of the information contained in your forms, the InfoPath client and SharePoint Server provide the controls necessary to enable single, co-sign, and counter-sign scenarios for the full form or portions of the form. The Microsoft ActiveX® control in the Internet Explorer® browser gives users the ability to sign forms in a browser. The signed form, however, can be viewed in any browser that supports SharePoint Server.
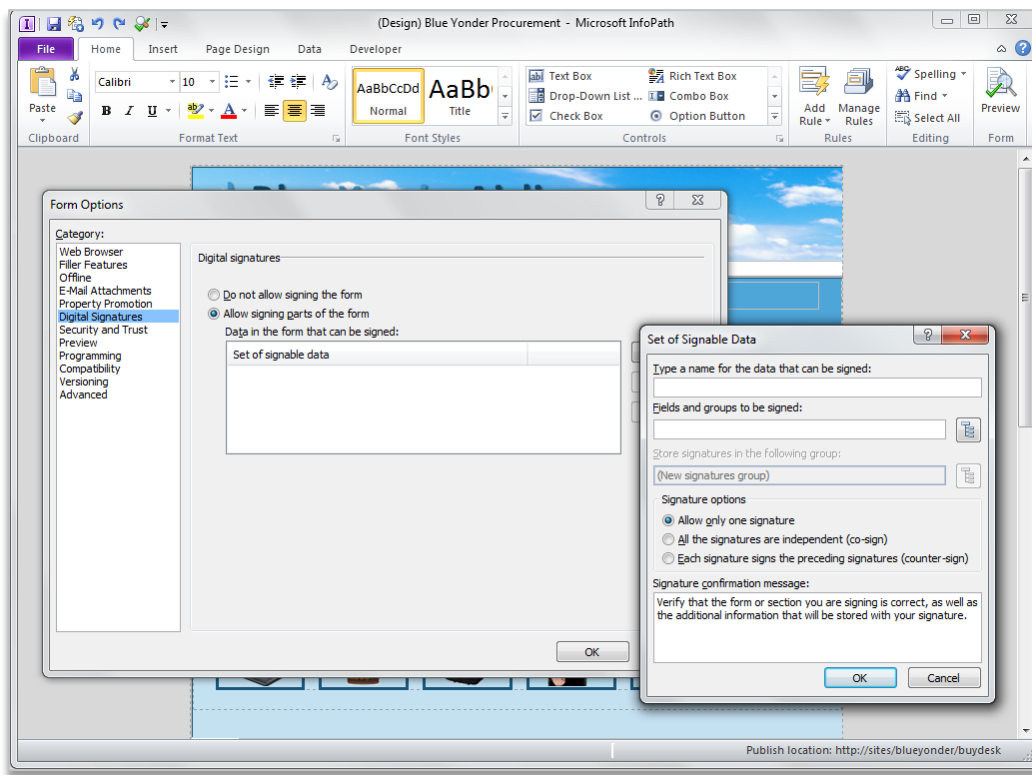
Figure 7 - Enhance information security and integrity with digital signatures.

Embed Forms in Web Pages

In SharePoint Server 2010, it's easier than ever to host your forms on Web pages using the new InfoPath Form Web Part. In SharePoint Server 2007, users who wanted to host their InfoPath forms on Web pages had to write ASP.NET code in Visual Studio. Now, without writing a single line of code, you can simply add the InfoPath Form Web Part to a Web Part page and point it to your published form.

You can use the Web Part to host any InfoPath browser form that has been published to a SharePoint list or form library. You can also connect it to other Web Parts on the page to send or receive data.

Here are just a few examples of solutions that you can create using the Web Part:

- **Mortgage calculator**—Create a simple mortgage calculator using the InfoPath Form Web Part to input the values and send the data to the Microsoft Excel Web Access Web Part to calculate the mortgage repayments.

- **Manage your Customers and Orders list data on the same page**—When viewing or editing items in a Customers list, you can also manage all Orders for that customer from the related Orders list. This is achieved by connecting to the SharePoint Orders list Web Part and filtering its contents based on the customer ID value in the InfoPath Customer form.

- **Manage Help Tickets in a SharePoint list or library**—Quickly and easily view or edit items in a Help Tickets list or library. When an item is selected in the Help Tickets list Web Part, the list item ID is sent to the InfoPath Form Web Part that displays the list item details.

- **Automatically fill in contact information in a customer requirement form**—When filling out a new customer requirement form, you can automatically fill in the contact information with data from the Customers list by selecting an item in the Customers list Web Part and sending the values into the fields in the requirement form in the InfoPath Form Web Part.

You also can embed InfoPath forms into an ASP.NET Web page using the .NET XMLFormView control if your choice of the Web environment does not include SharePoint Server as a site host.

InfoPath 2010 in Action

Business challenge: Luisa Cazzaniga is a developer at Proseware, Inc. She needs to create a help desk application that employees can use to fill out help requests and that IT support technicians can use to manage requests, find answers to questions, and order parts.

Solution: Luisa uses InfoPath 2010, SharePoint Server 2010, and SharePoint Designer to create the application. Without writing any code, she uses InfoPath to create a form that includes:

- A SharePoint form library to store the requests.

- Professional-looking layout with related items (such as those for issue, details, and response) grouped together.

- Drop-down lists, radio buttons, and fields for users to type in information.

- Data validation for phone numbers to ensure that users can enter only valid phone numbers.

- Color-coded conditional formatting to flag active requests in red and resolved requests in green.

- Different form views for requestors, who can fill in all fields, and help desk technicians, who have read-only views for requestor information and new fields, such as one to type in the resolution description.

- Vendor information using connections to InfoPath external data sources.

Figure 8 - Create advanced forms in InfoPath Designer.

InfoPath 2010: More Details

Here is a sampling of additional features in InfoPath 2010 that you can use to enhance forms-driven business processes.

Give Users the Ability to Complete Forms in E-Mail

Outlook 2010 can host InfoPath forms, so forms can be sent and completed through e-mail. The InfoPath forms in most cases would facilitate gathering of the information into a database or a SharePoint library. By deploying InfoPath forms as Outlook e-mail messages, users throughout your organization can complete forms quickly and easily using the familiar Outlook environment.

Host InfoPath Inside Microsoft Office Programs

A challenge many organizations face is finding documents quickly and easily when they are needed. Ensuring that documents are tagged with appropriate metadata can help you manage them over their entire life cycles.

Microsoft Office 2010 programs, including Word, Excel, and PowerPoint, can host InfoPath forms for the collection and transmission of document properties and other important metadata. Using InfoPath 2010, you can customize document information panels to collect the metadata you need. You can customize document-based properties such as author name and keywords and metadata that are specific to an organization or project, such as a project code or cost center value.

By using the InfoPath environment to tag and capture metadata within these Office applications, you can help ensure users are adding the right information to their documents to improve content tracking and management for your organization.

Extend Forms to Mobile Devices

You can host InfoPath 2010 Web-enabled forms and mobile forms with SharePoint Server 2010, so people outside of your organization can use your electronic forms.

SharePoint Server 2010 can render InfoPath 2010 form templates as browser-based forms that do not require a local installation of InfoPath 2010. In fact, browser forms offered using SharePoint Server 2010 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 Internet Explorer 7 or 8, Safari 4.0, and Mozilla Firefox 3.0 browsers. Mobile devices with HTML-based browsers, such as Windows Mobile® or an iPhone, can access and complete InfoPath forms as well.

Combine Data from Many Sources

You can also easily combine data from many sources simultaneously by using Web services, XML, Microsoft SQL Server, and Microsoft Access® 2010 data connections in the same form.

Conclusion

With the enhancements in InfoPath 2010, you can make sophisticated, customized forms without writing code to gather the information you need. You can create forms for SharePoint lists. With InfoPath Filler and interoperability with other Microsoft Office 2010 applications, including Outlook and SharePoint Workspace, you can give users more options when filling out forms.

If you're an IT Pro or Developer, you can create composite applications and workflow sequences with InfoPath 2010 and SharePoint Server 2010 for advanced forms for departmental and enterprise business processes—using little or no code. You can connect InfoPath forms with other data sources and line-of-business systems using SharePoint Server 2010 Business Connectivity Services and SOAP and REST Web services. Your InfoPath solutions can also be portable using SharePoint Foundation solutions file (.wsp) format.

Whether to gather information for an immediate business need or create a forms-driven business process that includes SharePoint-enabled workflows, InfoPath 2010 provides easy-to-use tools to help you create attractive forms to gather the right information quickly and efficiently.

Where to Find It

	Features and Benefits	Where to Find
New!	InfoPath Filler	Fill out a form in a straightforward way via InfoPath Filler. We removed all the unnecessary functionality for people who just want to open and fill out a form. • InfoPath Filler
Improved!	Collect better, more accurate information	Collect the right information, from the very start, using data validation (mandatory fields, value ranges, input formats), screen tips and Conditional Formatting (highlight date if it is past due). • InfoPath Filler • Online forms
Improved!	Build sophisticated forms easily	Build sophisticated forms more easily using the new pre-built rules (rules management and quick rules), form layout sections, styles and more. • InfoPath Designer
Improved!	Work with forms online or offline	Work either on or offline, with a native implementation of InfoPath forms inside SharePoint Workspace 2010. • InfoPath List Forms can be integrated with SharePoint Workspace.
Improved!	Combine data from different sources	Easily combine data from many sources simultaneously by using Web services, XML, Microsoft SQL Server and Access 2010 data connections in the same form. • InfoPath Designer

	Features and Benefits	Where to Find
Improved!	Design a form once for rendering in the browser and on your PC	InfoPath 2010 now has improved parity between client and Microsoft Office SharePoint Server forms, providing a more consistent and richer user experience. Controls available in both include: bulleted, numbered and plain lists, multiple selection list box, combo box, picture buttons, hyperlink, choice group and choice section. Also, filtering functionality is available in both environments. • InfoPath Designer
New!	Easily portable forms	Package a custom InfoPath solution with relative URLs on one machine and redeploy the solution on any other server, saving solution developers lots of time and effort. • InfoPath Designer
Improved!	Information integrity	InfoPath 2010 better ensures information integrity by supporting the Cryptography Next Generation digitally signed forms. • InfoPath Designer and InfoPath Filler
New!	Create WCAG 2.0-compliant forms for accessibility	InfoPath 2010 forms on SharePoint Server 2010 are now compliant with WCAG 2.0 AA to help you create forms that are accessible to users with disabilities. • SharePoint Server 2010-supported browsers, including Internet Explorer, Firefox and Safari.
New!	Extend your InfoPath forms solutions	InfoPath 2010 can be fully integrated with SharePoint Server 2010. For organizations that use both products, InfoPath 2010 forms can be extended to Internet browsers and mobile devices, used in SharePoint-enabled business workflows, and more. Designers also have more options to create InfoPath forms, such as easily auto-generating forms from SharePoint regular or external lists. • InfoPath 2010 and SharePoint 2010.

	Features and Benefits	Where to Find
New!	REST Web service data connection support	InfoPath 2010 now supports getting XML data from Representative State Transfer (REST) Web services. REST Web Services use input parameters that are passed in through a URL. Form designers can now change the URL parameters dynamically in the InfoPath form without any code using rules to get desired data from the REST Web Service. • InfoPath 2010
New!	Ribbon	Design and deploy electronic forms easier than ever using the new Ribbon. • InfoPath Designer 2010 and InfoPath Editor 2010 • In Backstage view, click **Options** to customize the Ribbon.
New!	Backstage view	The Backstage view replaces the traditional File menu to help you get to the tasks you need and complete your work more efficiently. • Click the **File** tab open Backstage view.

Version Comparison

☐ Feature Included   ■ Improved   ☑ New

	2007	2010
Ribbon The Ribbon replaces the menu and toolbars at the top of the InfoPath window and is available across the application. And, you can now customize the Ribbon or create your own tabs to personalize the InfoPath experience to your work style.		☑
Microsoft Office Backstage view The new Backstage view replaces the traditional File menu to provide a single location for all of your account management tasks.		☑
64-bit version Maximize new and existing 64-bit hardware investments with the 64-bit edition of Office 2010. **Note:** This option can only be installed on 64-bit systems. For installation instructions and more information visit: http://office.com/office64setup.		☑
Workflow Integration By using InfoPath form templates together with the workflow management features in Microsoft SharePoint Server 2010, you can automate business processes in which forms are passed from one user to another.	☐	☑
New and Improved SharePoint Options Take SharePoint Lists offline using SharePoint Workspace 2010. Work online or offline with a native implementation of InfoPath forms inside SharePoint Workspace 2010.	☐	☑

Microsoft

E-mail Forms

Designed to work seamlessly with Microsoft Outlook 2010, publish a form template to a list of e-mail recipients to let them perform a variety of form-related tasks within Outlook.

☑ ■

Forms for SharePoint List

Extend and enhance the forms used for creating, editing and viewing items in a SharePoint list.

☑

Forms for the Web

Design a browser-compatible form template that browser-enabled users (who do not have InfoPath installed) can fill out in a web browser.

☑ ■

New InfoPath Filler

Improved, simpler user experience for filling out forms.

☑

Powerful Additions to InfoPath Designer

With combo box controls, multiple selection list boxes, and reusable template parts, InfoPath Designer gets ever better.

☑ ■

Design Checker

Use the Design task pane to detect design problems, such as controls that won't work properly in previous versions or features that are unsupported in browser-compatible form templates.

☑ ■

Logic Inspector

Review all of the data validation settings, calculated default values, rules, and programming features that are associated with your form template.

☑ ■

Quick Rules

Use out-of-the-box rules (or quick rules) and improved rules management UI to add rules to validate data, format your form, or perform other actions with just a few clicks, and without any code.

☑

InfoPath Forms Services Management

Easily manage your InfoPath Forms Services as a component of Microsoft SharePoint Server 2010.

☑ ∎

Quick Publish

Publish updated forms with a single click.

☑

REST Web Services

Change URL parameters dynamically in the InfoPath form without any code, using rules.

☑

InfoPath 2010 FAQ

1. **What is InfoPath 2010 and what does it do?**

   InfoPath 2010 helps organizations collect data and streamline business processes with electronic forms that are easy to design, deploy, and use. InfoPath 2010 is designed for both advanced business users and IT pros and developers, depending on the type of forms-based solution a user or organization wants to create.

2. **What Office 2010 features does InfoPath adopt?**

   Ribbon: The Ribbon, new in InfoPath 2010, helps you to find the right commands quickly so you can focus on results.

   Microsoft Office Backstage: The new Microsoft Office Backstage view replaces the traditional File menu to help you get to the tasks you need and complete your work more efficiently.

3. **Where can I find information about using the Ribbon?**

   You can find information about the Ribbon by going to Help from within the InfoPath.

4. **I don't know anything about InfoPath, are there resources and trainings available from Microsoft?**

   Microsoft offers a broad set of resources for InfoPath users and potential users at http://office.microsoft.com. This includes videos and helpful how-to articles.

5. **What if I have questions or need advice while I'm working in InfoPath? Are there free resources available?**

   You can access numerous free, self-help resources on Office.com. Resources range from how-to training and demos to obtaining answers from your peers and independent experts –such as the Microsoft Most Valuable Professionals—in the Microsoft Office communities.

6. **What languages is InfoPath 2010 available in?**

   InfoPath 2010 will be available in all of the following languages: Arabic, Basque, Brazilian, Bulgarian, Catalan, Chinese, Croatian, Czech, Danish, Dutch, English, Estonian, Finnish, French, Galician, German, Greek, Hebrew, Hindi, Hungarian, Italian, Japanese, Kazakh, Korean,

Latvian, Lithuanian, Norwegian, Polish, Portuguese, Romanian, Russian, Serbian Latin, Serbian Cyrillic, Slovak, Slovenian, Spanish, Swedish, Thai, Turkish, and Ukrainian.

7. When used with SharePoint Server 2010, what does InfoPath 2010 provide?

When combined with SharePoint Server 2010, InfoPath 2010 forms can be deployed as part of an automated business process, including routing and notification capabilities based on information within the form. Because InfoPath 2010 can be fully integrated with the workflow capability of SharePoint Server 2010, 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 more efficient.

In addition, when using SharePoint Server 2010 and InfoPath 2010 together, you can:

- Extend the reach of your forms to Web browsers and mobile devices inside and outside your firewall.
- Create forms based on SharePoint lists.
- Give users the ability to fill out forms online or offline in SharePoint Workspace.
- Easily combine data from multiple sources simultaneously using Web services, XML, Microsoft SQL Server, and SharePoint Server 2010 data connections within the same form.
- Connect InfoPath 2010 with the Business Connectivity Services of SharePoint Server 2010.
- Create SharePoint applications for even more powerful forms-driven business processes.

8. Who is InfoPath 2010 designed for?

InfoPath 2010 is designed for both advanced business users and IT pros and developers, depending on the type of forms-based solution a user or an organization needs. If you're an advanced business user and want to create electronic forms to gather data, InfoPath 2010 makes it easier than ever. You can easily create sophisticated forms without writing code by using prebuilt rules, form layout sections, styles, and more, all within a familiar Office environment.

You can create even more powerful forms-driven business processes using InfoPath 2010 with SharePoint Server 2010. With SharePoint Server 2010, you have more options when creating forms, such as creating automatically generated forms based on SharePoint lists and using InfoPath forms in SharePoint-enabled workflows.

If you have more advanced development skills, you can build composite applications using InfoPath forms for business processes. InfoPath 2010 provides advanced interoperability based on industry standards to work with your current IT infrastructure. You can also enhance InfoPath forms with code using a variety of programming languages in the Visual Studio Tools for Applications development framework that ships with InfoPath 2010.

9. **What are some of the typical ways teams and organizations might use InfoPath 2010 and SharePoint Server 2010?**

InfoPath 2010 and SharePoint Server 2010 can be applied to many different scenarios, either within organizations and workgroups, or across suppliers and partners. Using InfoPath forms solutions:

- A division manager can design and implement a performance appraisal system.
- A company can implement a timecard or expense reporting system. The IT department can centralize the management of forms for every organization under in a single environment.
- A health insurance company can create and implement its forms, and then integrate them into its database system and with the business processes of member hospitals.
- A team or workgroup can submit weekly status reports.

10. **When should I use InfoPath 2010 alone and when should I use it with SharePoint Server 2010?**

You can use InfoPath 2010 to easily create sophisticated forms for an immediate need for data collection—for example, for gathering feedback, creating status or expense reports, and tracking issues.

When combined with SharePoint Server 2010, you can create forms-driven business processes using InfoPath 2010 forms. You can integrate InfoPath forms in SharePoint-enabled workflows, make InfoPath forms from SharePoint lists, and extend forms to users outside your organization on Web browsers or mobile devices.

Because InfoPath 2010 has been developed using industry standards, you can integrate InfoPath 2010 forms into composite applications. You can enhance InfoPath 2010 forms with code using Visual Studio Tools for Applications or create SharePoint Server Sandboxed solutions for forms for more functionality. You also can connect InfoPath 2010 forms with other forms, data sources, and line-of-business systems.

System Requirements

1. Are there special system requirements for me to run InfoPath 2010?

Office 2010 was built to maximize performance across the hardware you already own, while also positioning you for future hardware innovations such as 64-bit chips, advanced graphics cards, multi-core processors and alternative form factor devices.

Following are minimum system requirements for Microsoft Office Professional Plus 2010:

Processor	500 MHz processor; 1 GHz required for Outlook with Business Contact Manager
Memory	256 MB RAM; 512 MB recommended for graphics features, Outlook Instant Search, Outlook with Business Contact Manager, and certain advanced functionality.
Hard disk	3.0 GB available disk space
Display	1024x768 or higher resolution monitor
Operating system	Windows® XP with Service Pack (SP) 3 (32-bit operating system (OS) only) or Windows Vista® with SP1, Windows 7, Windows Server® 2003 R2 with MSXML 6.0, Windows Server 2008, or later 32- or 64-bit OS.
Graphics	Graphics hardware acceleration requires a DirectX® 9.0c graphics card with 64 MB or more video memory.
Additional Notes	• Certain advanced functionality requires connectivity to Microsoft Exchange Server 2010, Microsoft SharePoint® Server 2010, Microsoft Office Communications Server 2007 R2, and/or Microsoft SharePoint Foundation 2010. • Certain features require Windows Search 4.0. • Internet functionality requires an Internet connection. • Certain online functionality requires a Windows Live™ ID. • Certain features require Internet Explorer® (IE) 6 or later, 32-bit browser only. • Viewing a PowerPoint presentation broadcast requires one of the following browsers: Internet Explorer 7 or later for Windows, Safari 4 or later for Mac, or Firefox 3.5 or later for Windows, Mac or Linux. • Certain Microsoft® OneNote® require Windows Desktop Search 3.0, Windows Media® Player 9, Microsoft ActiveSync® 4.1, microphone, audio output device, video recording device, TWAIN-compatible digital camera, or scanner. Send to OneNote Print Driver and Integration with Business Connectivity Services require Microsoft .NET Framework 3.5 and/or Windows XPS features. • Product functionality and graphics may vary based on your system configuration. Some features may require additional or advanced hardware or server connectivity; visit http://www.office.com/products.

To obtain system requirements for each Microsoft Office 2010 suite and standalone applications visit: Office.com.

Feature Availability / Disclosure

Links provided in this product guide

- Some links provided in this guide will not be available until after the general availability of Microsoft Office 2010.