2007 Microsoft Office System

DEMO

Creating online forms for business and E-Governance

How is it usually done?

- Lots of forms need to be filled in by various parties such as customers, citizens, vendors and so on
- We create forms in Microsoft® Office Word / Microsoft Office Excel® and mail these to the target audience
- When the completed forms are received, someone has to manually compile the data in Microsoft Office Excel or a database
- Analysis is possible only after all the data has been compiled

Microsoft® Office

Problems faced

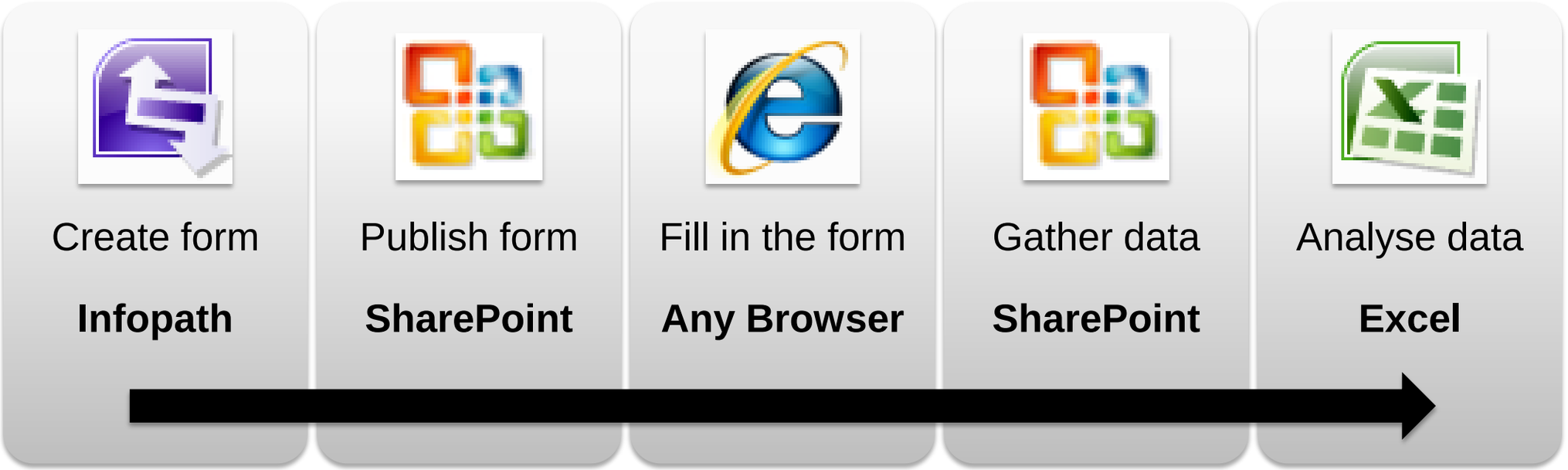
- Even though the forms are in electronic format, the data needs to be entered twice:
  - Once by respondents
  - Once again by the sender (before analysis)
- Creating forms is time consuming
- Not all users will have Microsoft Office Word on their PC
- Once sent, the forms can’t be altered
- The security and confidentiality of the data is difficult to manage
- Interim analysis is practically impossible

Microsoft® Office

We need a simple method of creating forms and filling them in using any browser

Let’s see how Microsoft Office 2007 can help us…

The process


Create form
Infopath
Publish form
SharePoint
Fill in the form
Any Browser
Gather data
SharePoint
Analyse data
Excel

Microsoft® Office

The best part is that you don’t need to be a programmer to do all this!

Creating the form

Infopath 2007 is used to create the form.

Let us call the person who is creating the form as “Initiator”

Initiator

Microsoft Office InfoPath

File Edit View Insert Format Tools Table Help

Getting Started

Form categories

- Recently Used Forms
- Favorites
- All Forms

Open a form

- testwithformlibrary
- Template3
- Online form for business a...
- On My Computer...

Design a form

- Design a Form Template...
- Import a Form...
- Customize a Sample

Form Templates on Office Online

Recently Used Forms

testwithformlibrary

Template3

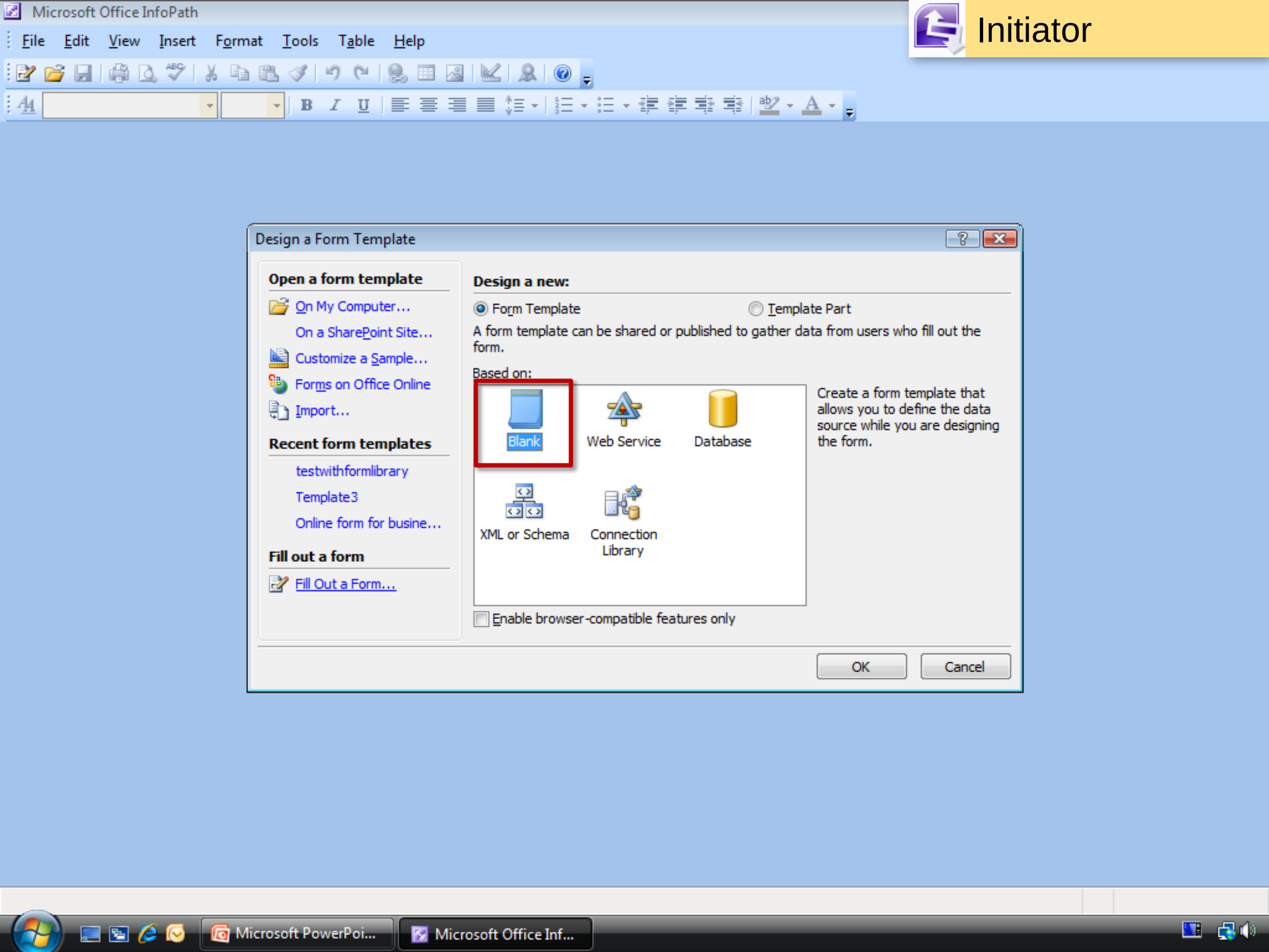
test manmeet

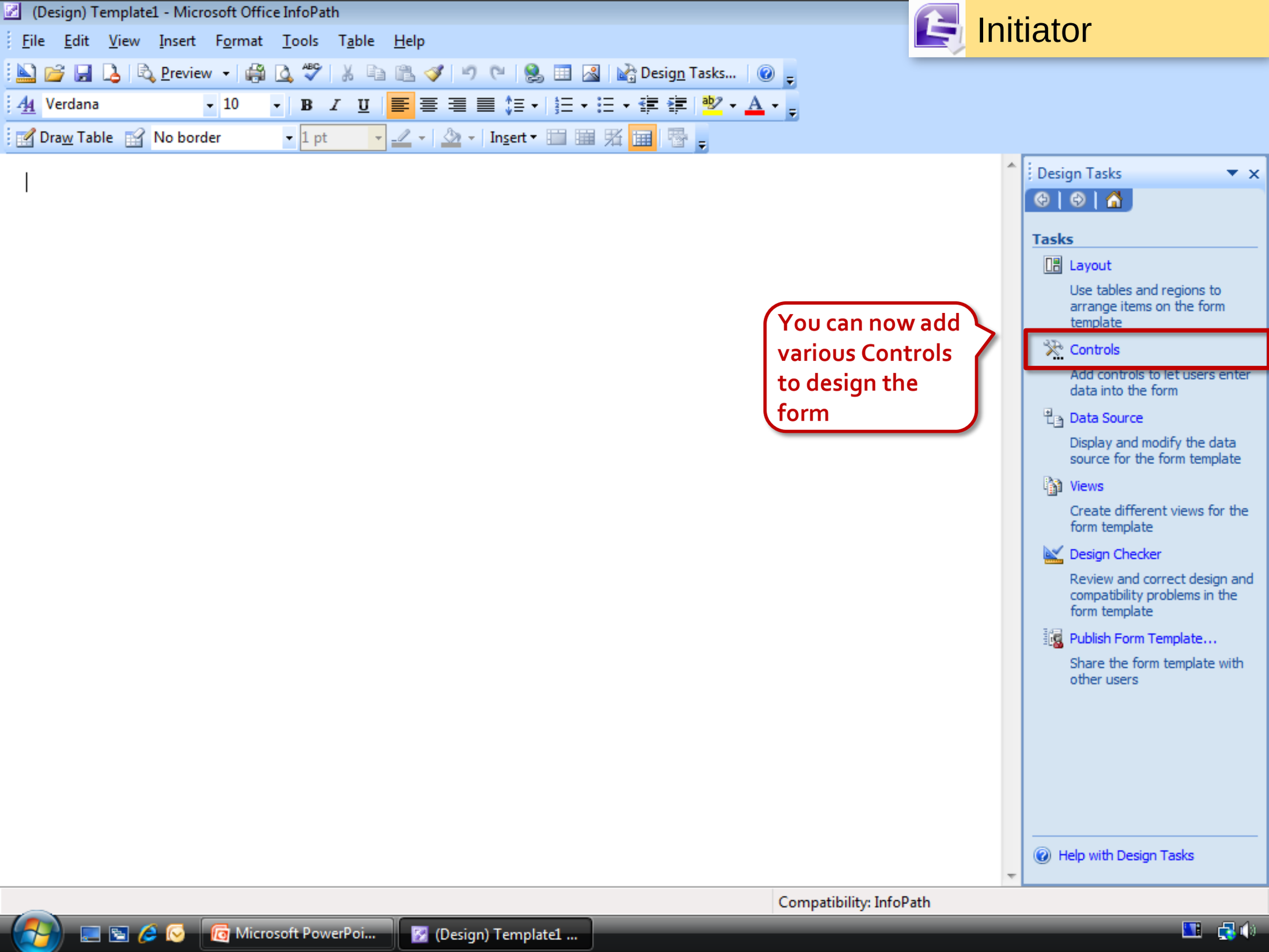
Online form for business an...

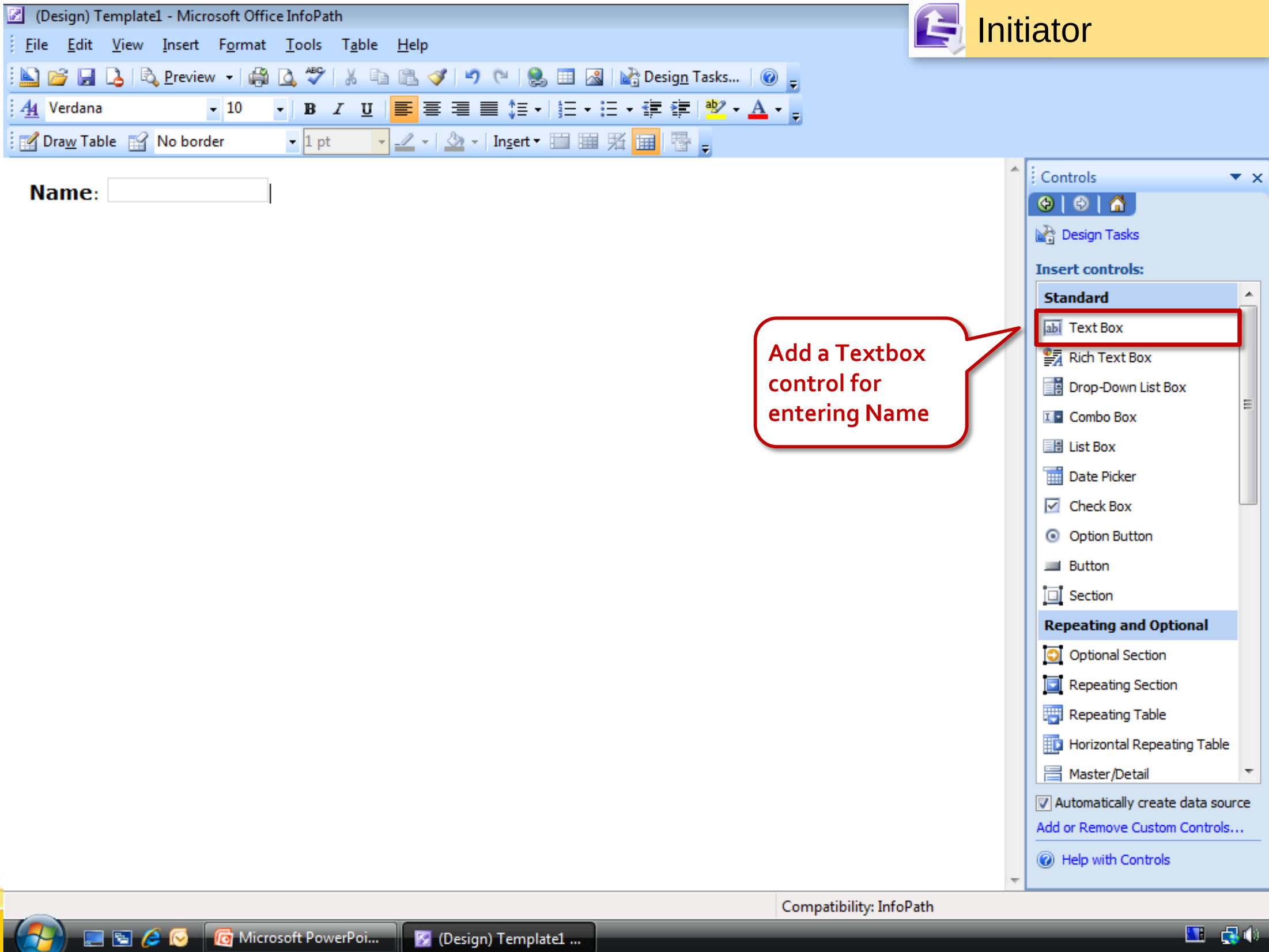
Form tasks

- Fill Out this Form
- Add to Favorites
- Design this form
- Remove this form
- Get update of this form
- Get Updates of Forms in this Category

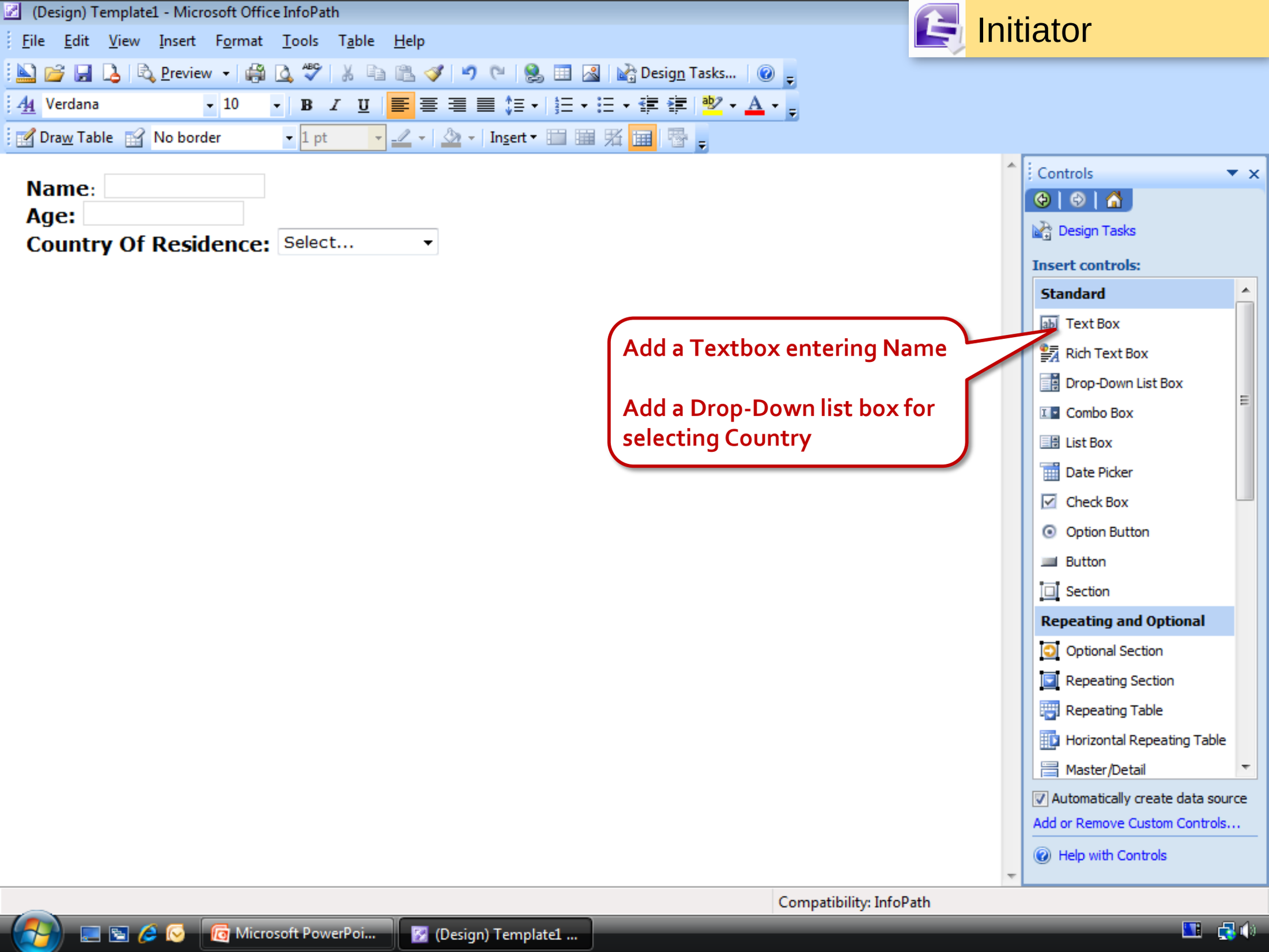
Microsoft PowerPoi... Microsoft Office Inf...

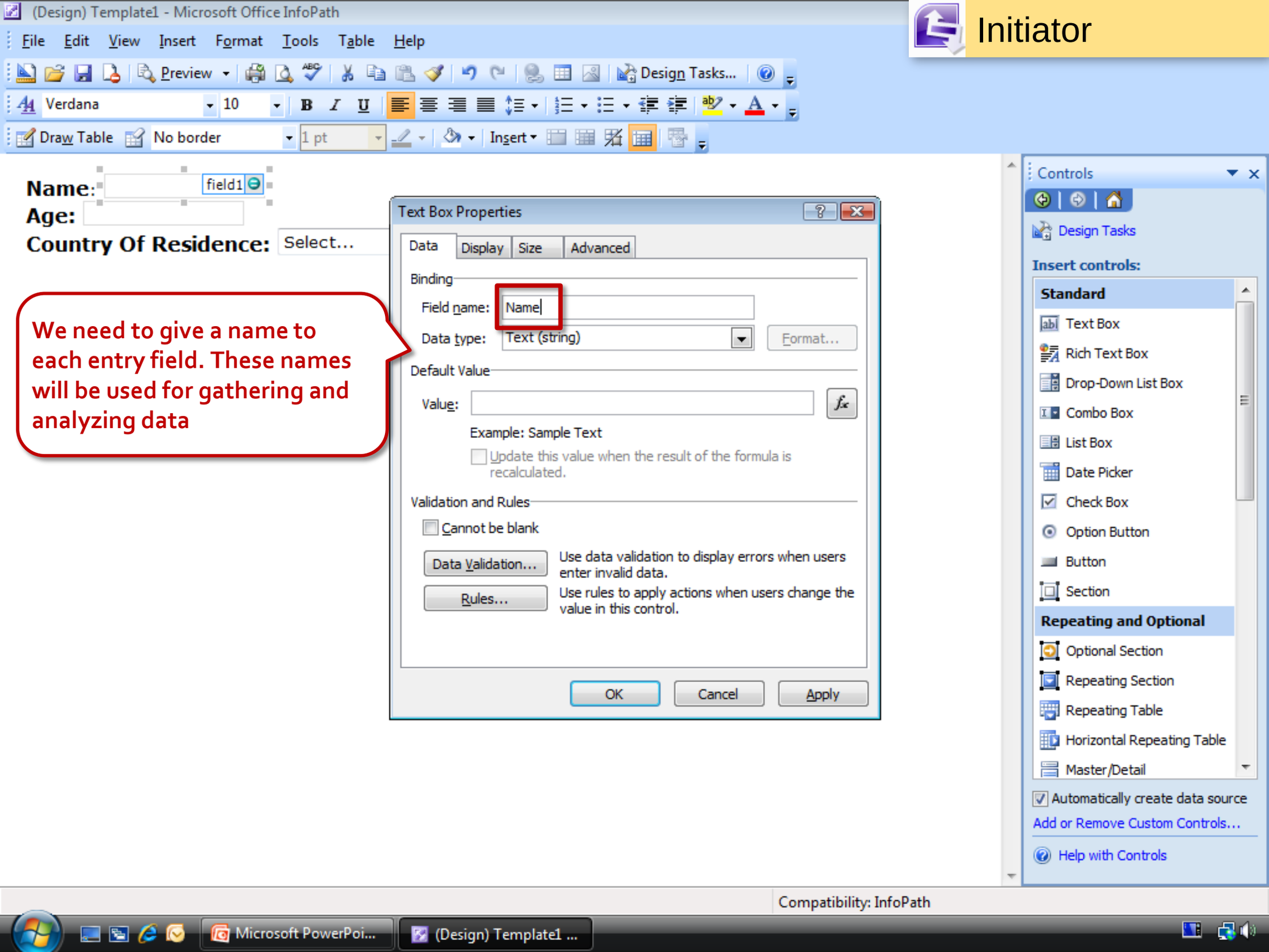

Microsoft Office InfoPath
File Edit View Insert Format Tools Table Help
Initiator
Design a Form Template
Open a form template
On My Computer...
On a SharePoint Site...
Customize a Sample...
Forms on Office Online
Import...
Recent form templates
testwithformlibrary
Template3
Online form for busine...
Fill out a form
Fill Out a Form...
Design a new:
Form Template
Template Part
A form template can be shared or published to gather data from users who fill out the form.
Based on:
Blank
Web Service
Database
XML or Schema
Connection Library
Create a form template that allows you to define the data source while you are designing the form.
Enable browser-compatible features only
OK
Cancel
Microsoft PowerPoi...
Microsoft Office Inf...

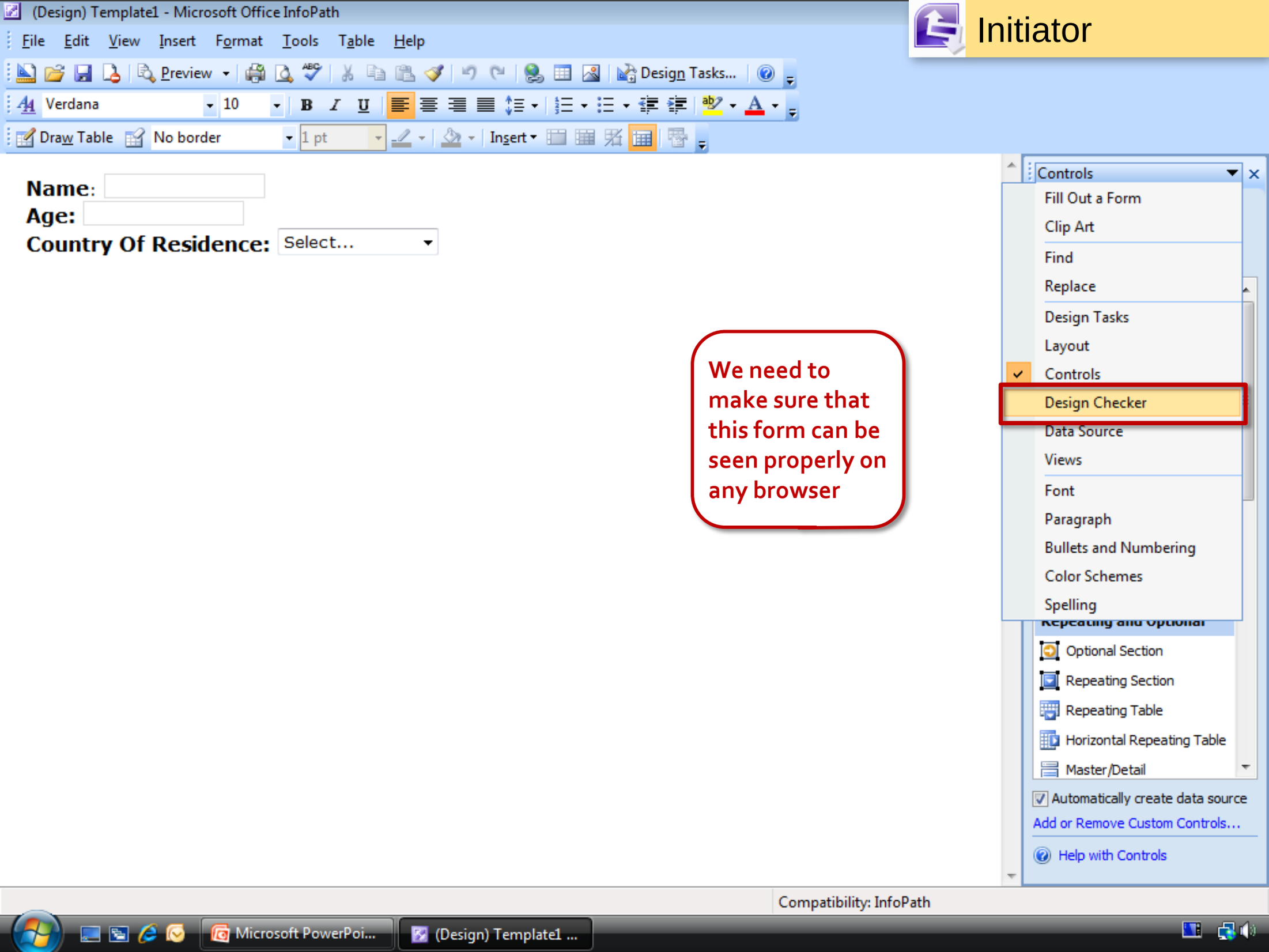

(Design) Template1 - Microsoft Office InfoPath
Initiator
File Edit View Insert Format Tools Table Help
Preview
Design Tasks...
Verdana
10
Draw Table
No border
1 pt
Insert
You can now add various Controls to design the form
Design Tasks
Tasks
Layout
Use tables and regions to arrange items on the form template
Controls
Add controls to let users enter data into the form
Data Source
Display and modify the data source for the form template
Views
Create different views for the form template
Design Checker
Review and correct design and compatibility problems in the form template
Publish Form Template...
Share the form template with other users
Help with Design Tasks
Compatibility: InfoPath
Microsoft PowerPoi...
(Design) Template1 ...

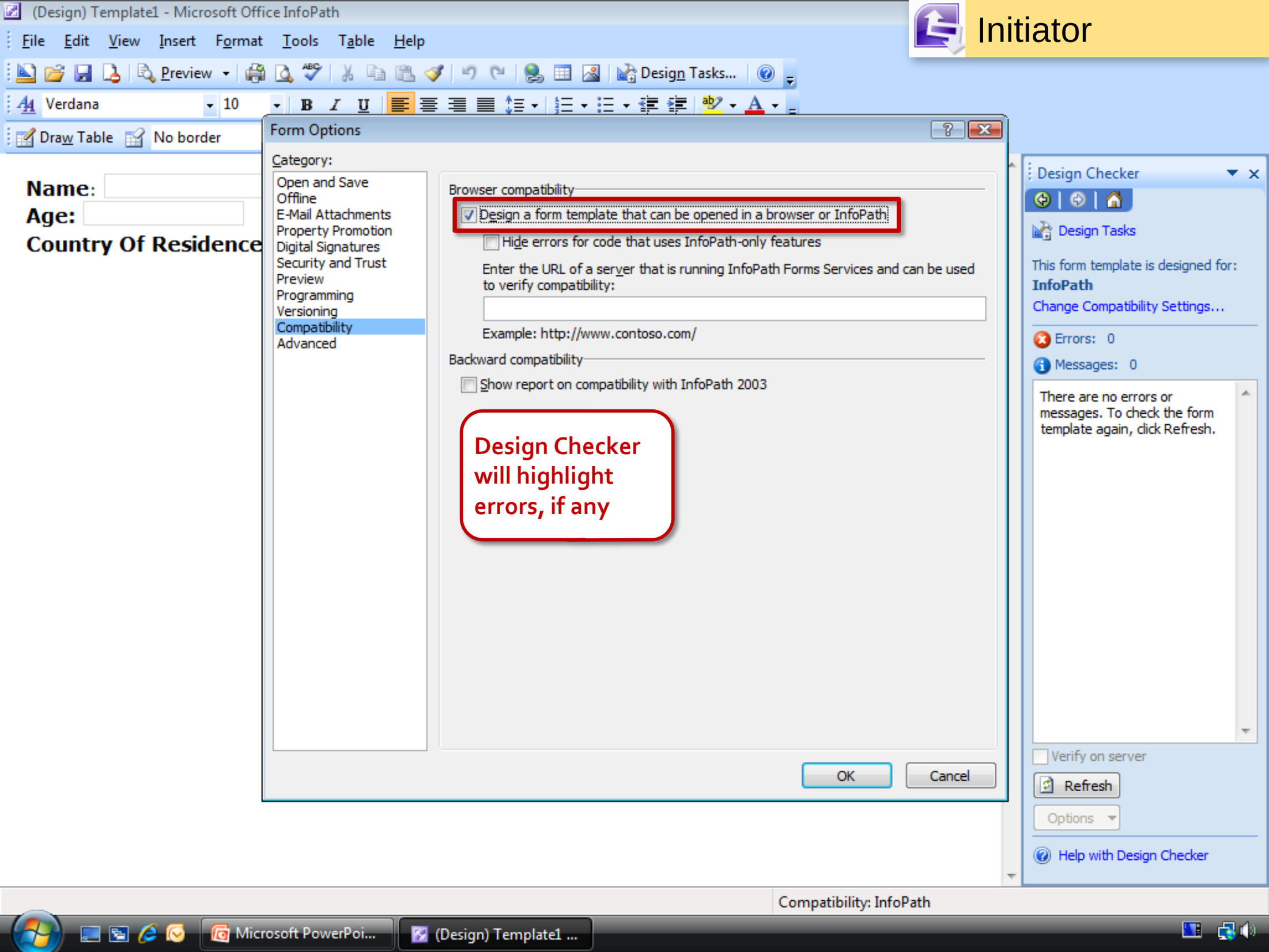

(Design) Template1 - Microsoft Office InfoPath
File Edit View Insert Format Tools Table Help
Preview
Design Tasks...
Verdana
10
Draw Table
No border
1 pt
Insert
Name:
Controls
Design Tasks
Insert controls:
Standard
Text Box
Rich Text Box
Drop-Down List Box
Combo Box
List Box
Date Picker
Check Box
Option Button
Button
Section
Repeating and Optional
Optional Section
Repeating Section
Repeating Table
Horizontal Repeating Table
Master/Detail
Automatically create data source
Add or Remove Custom Controls...
Help with Controls
Add a Textbox control for entering Name
Compatibility: InfoPath
Microsoft PowerPoi...
(Design) Template1 ...

Initiator


(Design) Template1 - Microsoft Office InfoPath
Initiator
File Edit View Insert Format Tools Table Help
Preview
Design Tasks...
Verdana
10
Draw Table
No border
1 pt
Insert
Name:
Age:
Country Of Residence:
Select...
Add a Textbox entering Name
Add a Drop-Down list box for selecting Country
Controls
Design Tasks
Insert controls:
Standard
Text Box
Rich Text Box
Drop-Down List Box
Combo Box
List Box
Date Picker
Check Box
Option Button
Button
Section
Repeating and Optional
Optional Section
Repeating Section
Repeating Table
Horizontal Repeating Table
Master/Detail
Automatically create data source
Add or Remove Custom Controls...
Help with Controls
Compatibility: InfoPath
Microsoft PowerPoi...
(Design) Template1 ...

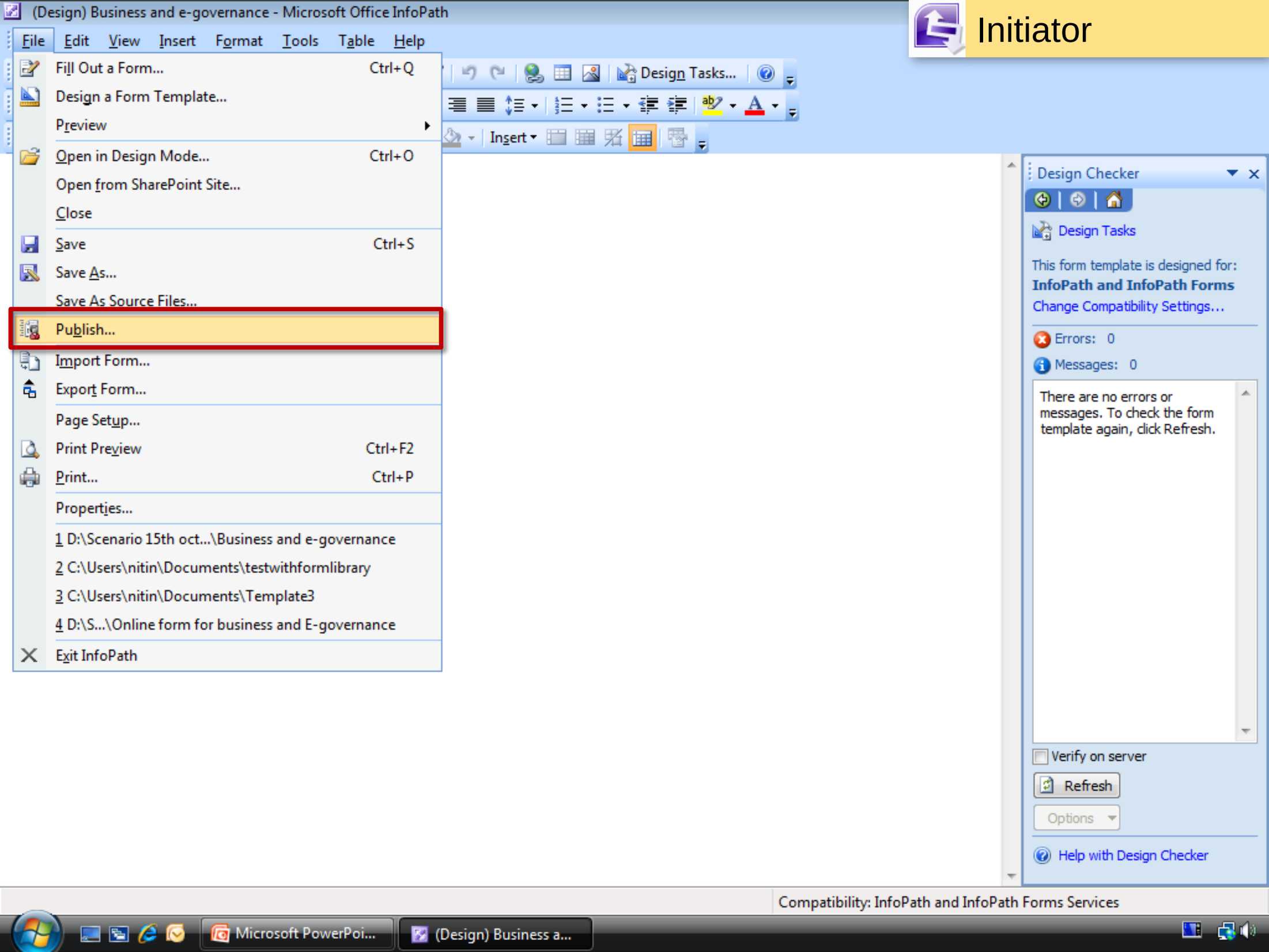

(Design) Template1 - Microsoft Office InfoPath
Initiator
File Edit View Insert Format Tools Table Help
Preview
Design Tasks...
Verdana
10
Draw Table
No border
1 pt
Insert
Name:
field1
Age:
Country Of Residence:
Select...
We need to give a name to each entry field. These names will be used for gathering and analyzing data
Text Box Properties
Data
Display
Size
Advanced
Binding
Field name:
Name
Data type:
Text (string)
Format...
Default Value
Value:
Example: Sample Text
Update this value when the result of the formula is recalculated.
Validation and Rules
Cannot be blank
Data Validation...
Use data validation to display errors when users enter invalid data.
Rules...
Use rules to apply actions when users change the value in this control.
OK
Cancel
Apply
Controls
Design Tasks
Insert controls:
Standard
Text Box
Rich Text Box
Drop-Down List Box
Combo Box
List Box
Date Picker
Check Box
Option Button
Button
Section
Repeating and Optional
Optional Section
Repeating Section
Repeating Table
Horizontal Repeating Table
Master/Detail
Automatically create data source
Add or Remove Custom Controls...
Help with Controls
Compatibility: InfoPath
Microsoft PowerPoi...
(Design) Template1 ...

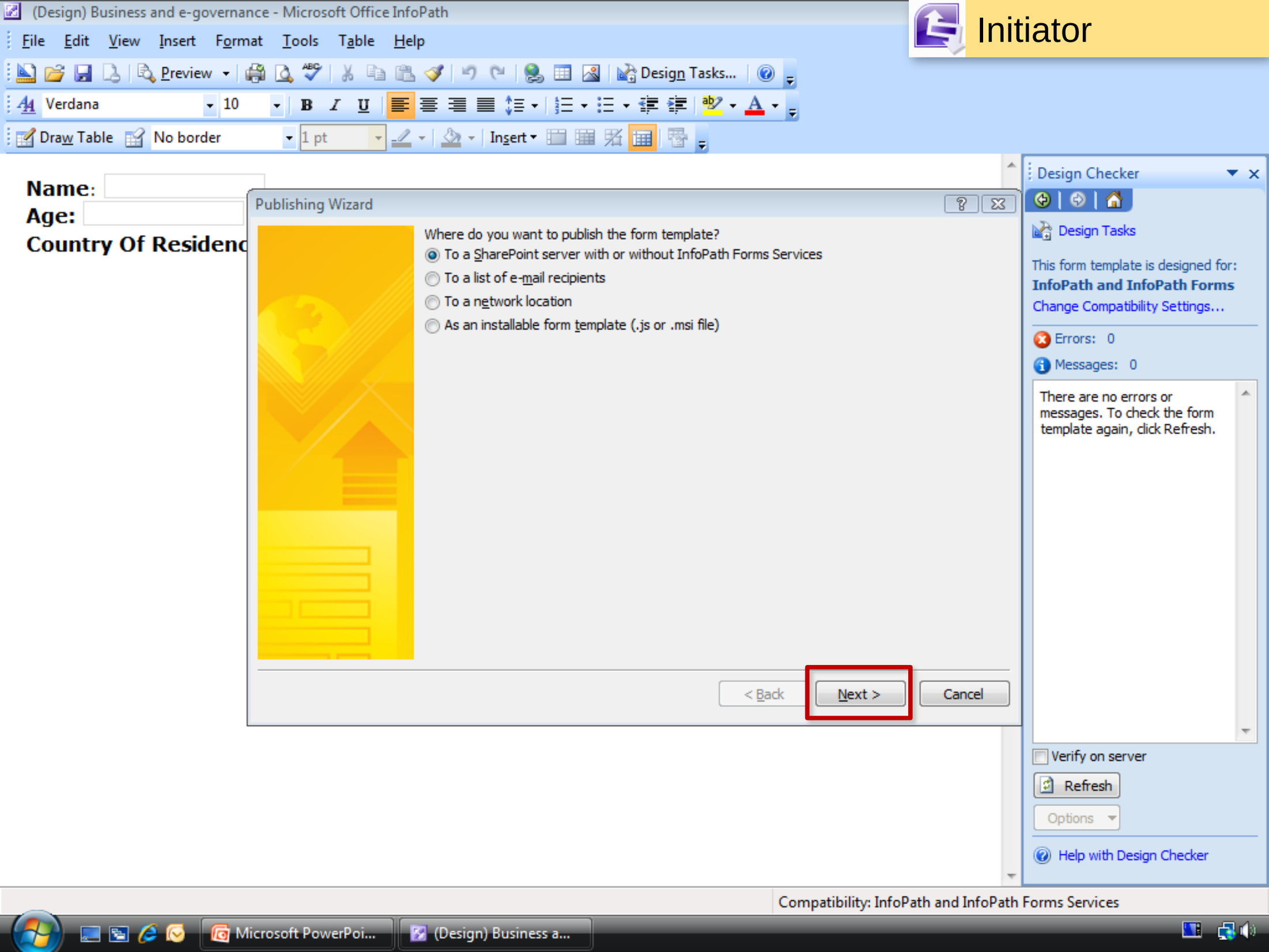

(Design) Template1 - Microsoft Office InfoPath
Initiator
File Edit View Insert Format Tools Table Help
Preview
Design Tasks...
Verdana
10
Draw Table
No border
1 pt
Insert
Name:
Age:
Country Of Residence:
Select...
We need to make sure that this form can be seen properly on any browser
Controls
Fill Out a Form
Clip Art
Find
Replace
Design Tasks
Layout
Controls
Design Checker
Data Source
Views
Font
Paragraph
Bullets and Numbering
Color Schemes
Spelling
Optional Section
Repeating Section
Repeating Table
Horizontal Repeating Table
Master/Detail
Automatically create data source
Add or Remove Custom Controls...
Help with Controls
Compatibility: InfoPath
Microsoft PowerPoi...
(Design) Template1 ...

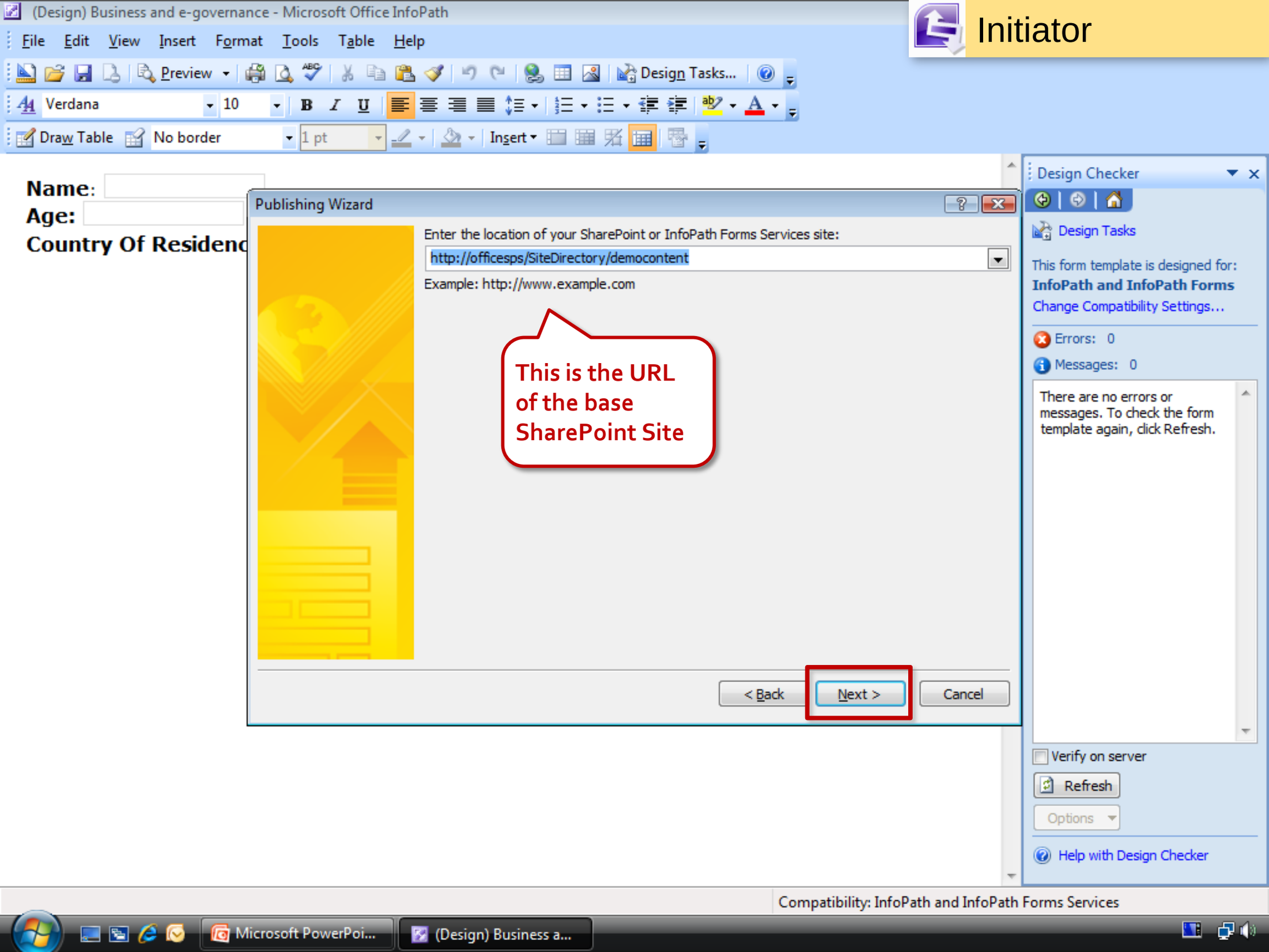

(Design) Template1 - Microsoft Office InfoPath
Initiator
File Edit View Insert Format Tools Table Help
Preview
Design Tasks...
Verdana
10
Draw Table
No border
Name:
Age:
Country Of Residence
Form Options
Category:
Open and Save
Offline
E-Mail Attachments
Property Promotion
Digital Signatures
Security and Trust
Preview
Programming
Versioning
Compatibility
Advanced
Browser compatibility
Design a form template that can be opened in a browser or InfoPath
Hide errors for code that uses InfoPath-only features
Enter the URL of a server that is running InfoPath Forms Services and can be used to verify compatibility:
Example: http://www.contoso.com/
Backward compatibility
Show report on compatibility with InfoPath 2003
Design Checker will highlight errors, if any
OK
Cancel
Design Checker
Design Tasks
This form template is designed for:
InfoPath
Change Compatibility Settings...
Errors: 0
Messages: 0
There are no errors or messages. To check the form template again, click Refresh.
Verify on server
Refresh
Options
Help with Design Checker
Compatibility: InfoPath
Microsoft PowerPoi...
(Design) Template1 ...

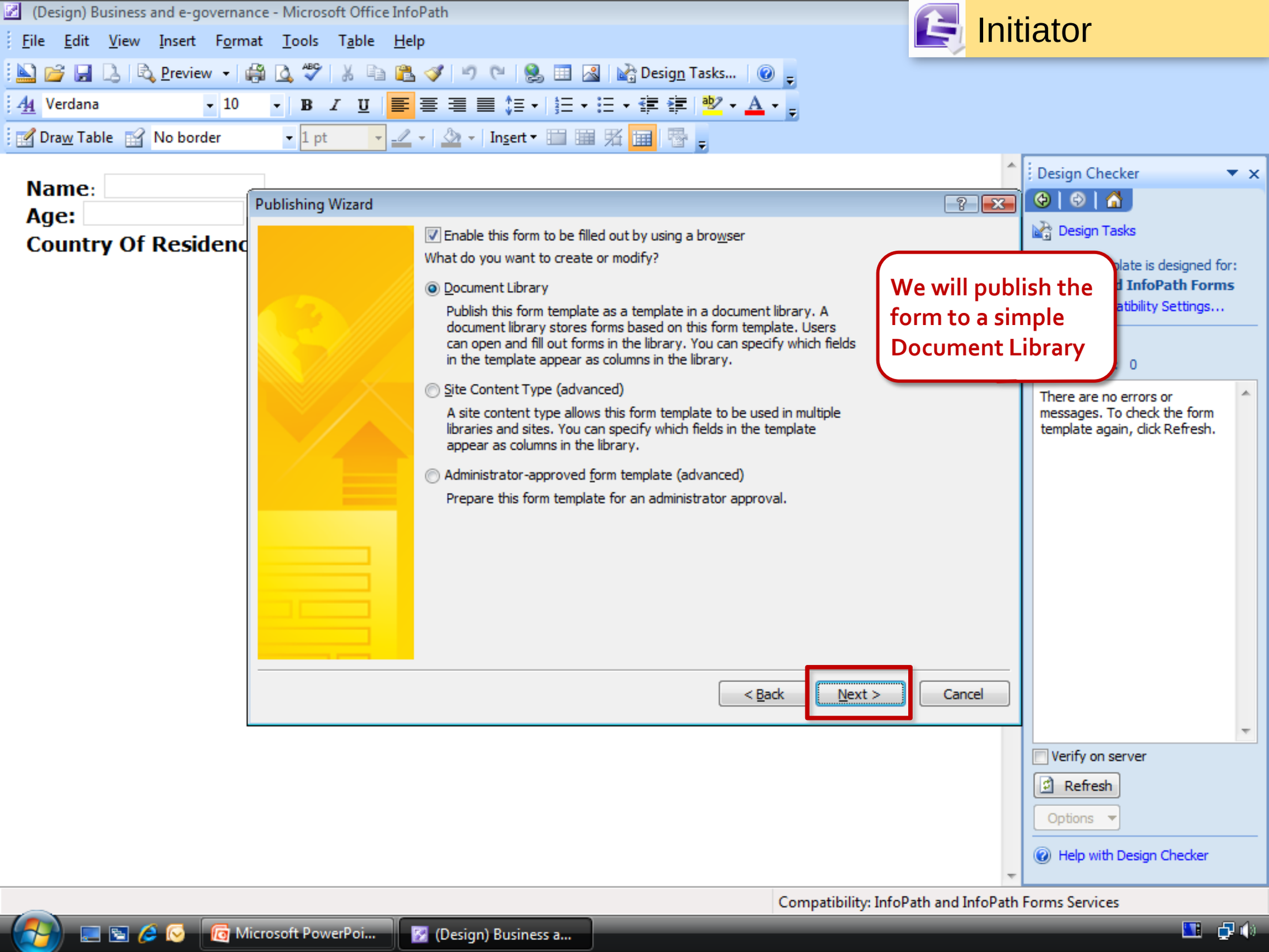
Publish the form on the portal

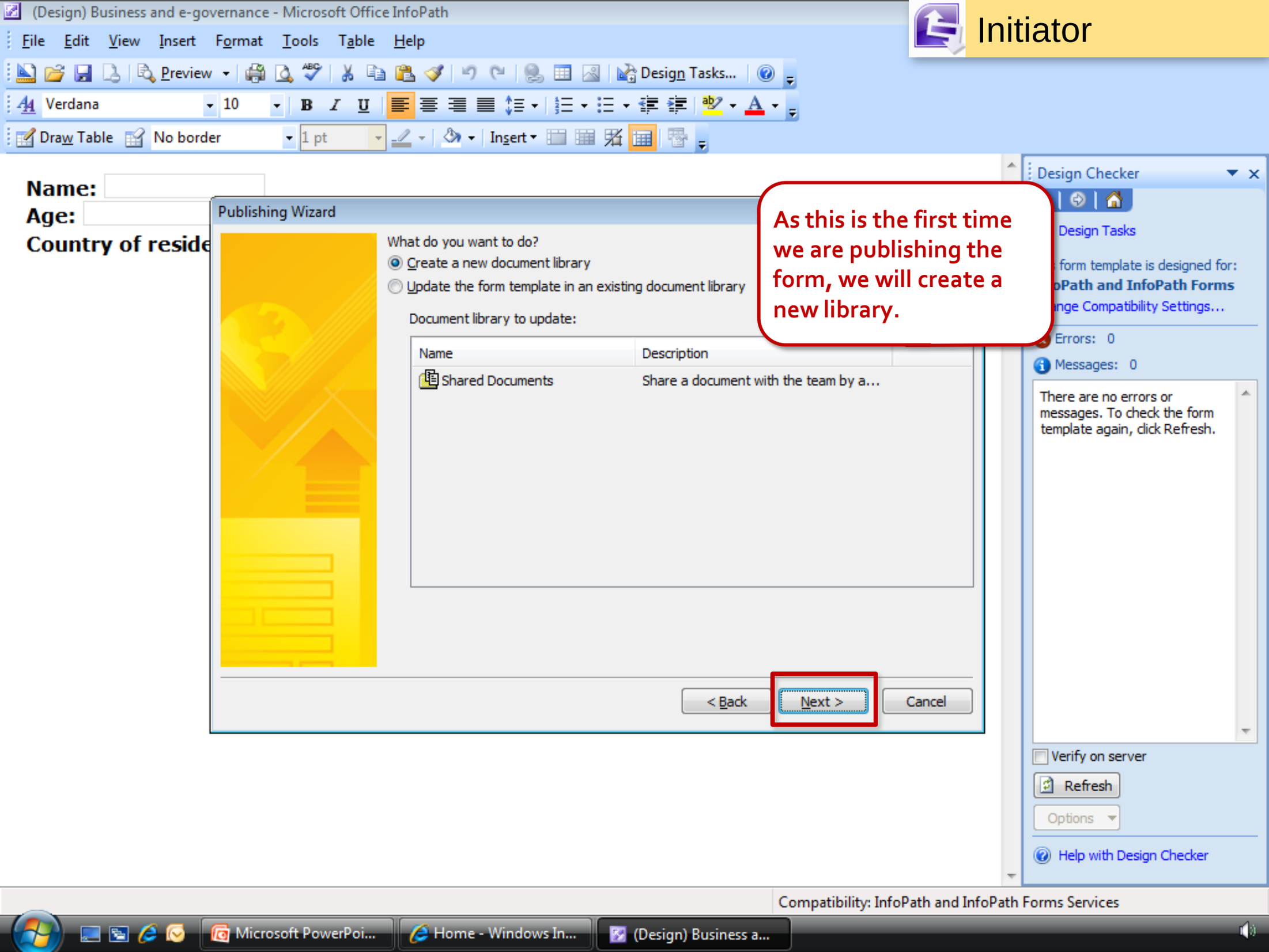
InfoPath form is now published to a new SharePoint web site

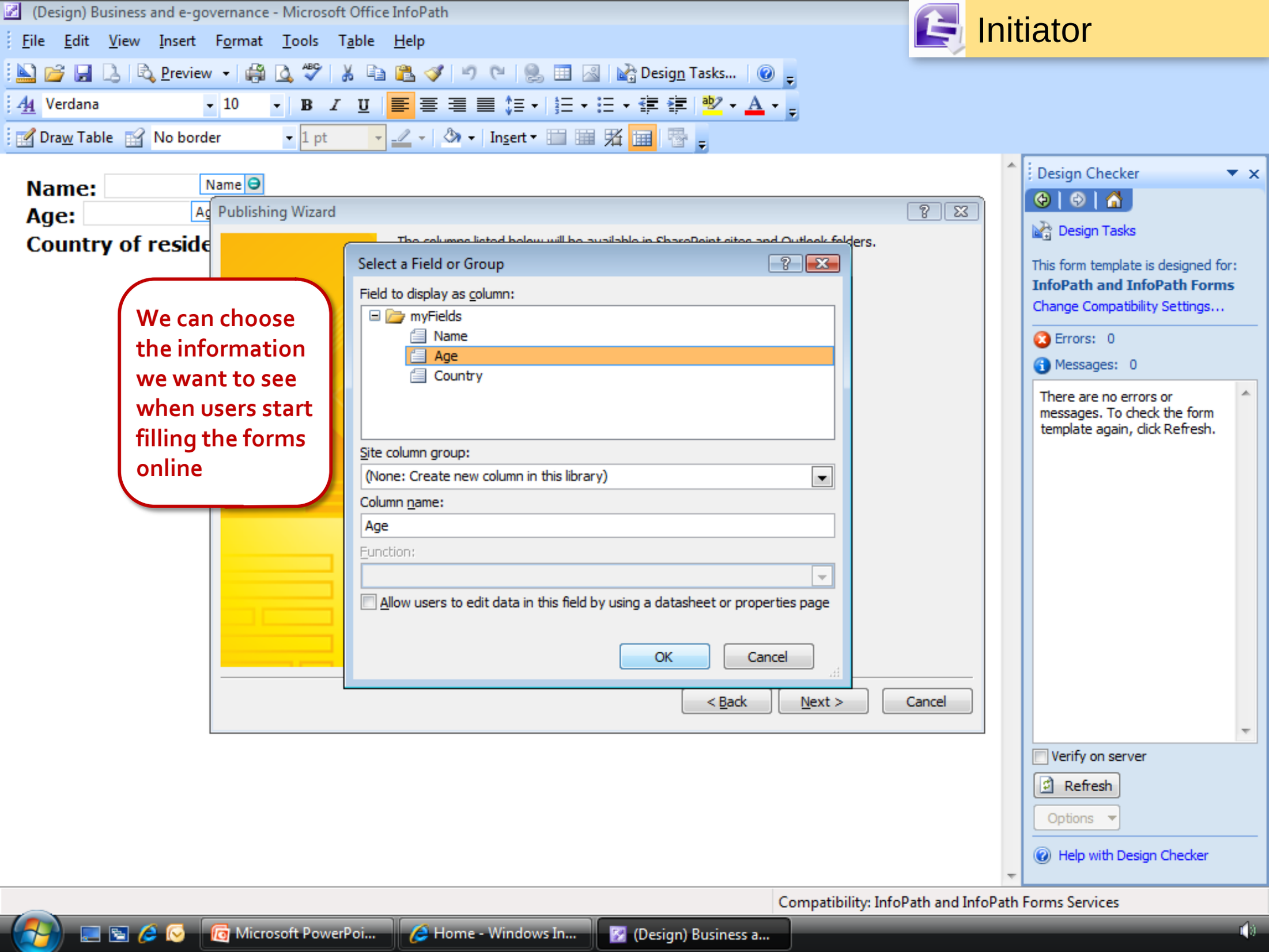

(Design) Business and e-governance - Microsoft Office InfoPath
Initiator
File Edit View Insert Format Tools Table Help
Fill Out a Form... Ctrl+Q
Design a Form Template...
Preview
Open in Design Mode... Ctrl+O
Open from SharePoint Site...
Close
Save Ctrl+S
Save As...
Save As Source Files...
Publish...
Import Form...
Export Form...
Page Setup...
Print Preview Ctrl+F2
Print... Ctrl+P
Properties...
1 D:\Scenario 15th oct...\Business and e-governance
2 C:\Users\nitin\Documents\testwithformlibrary
3 C:\Users\nitin\Documents\Template3
4 D:\S...\Online form for business and E-governance
Exit InfoPath
Design Tasks...
Insert
Design Checker
Design Tasks
This form template is designed for:
InfoPath and InfoPath Forms
Change Compatibility Settings...
Errors: 0
Messages: 0
There are no errors or messages. To check the form template again, click Refresh.
Verify on server
Refresh
Options
Help with Design Checker
Compatibility: InfoPath and InfoPath Forms Services
Microsoft PowerPoi...
(Design) Business a...

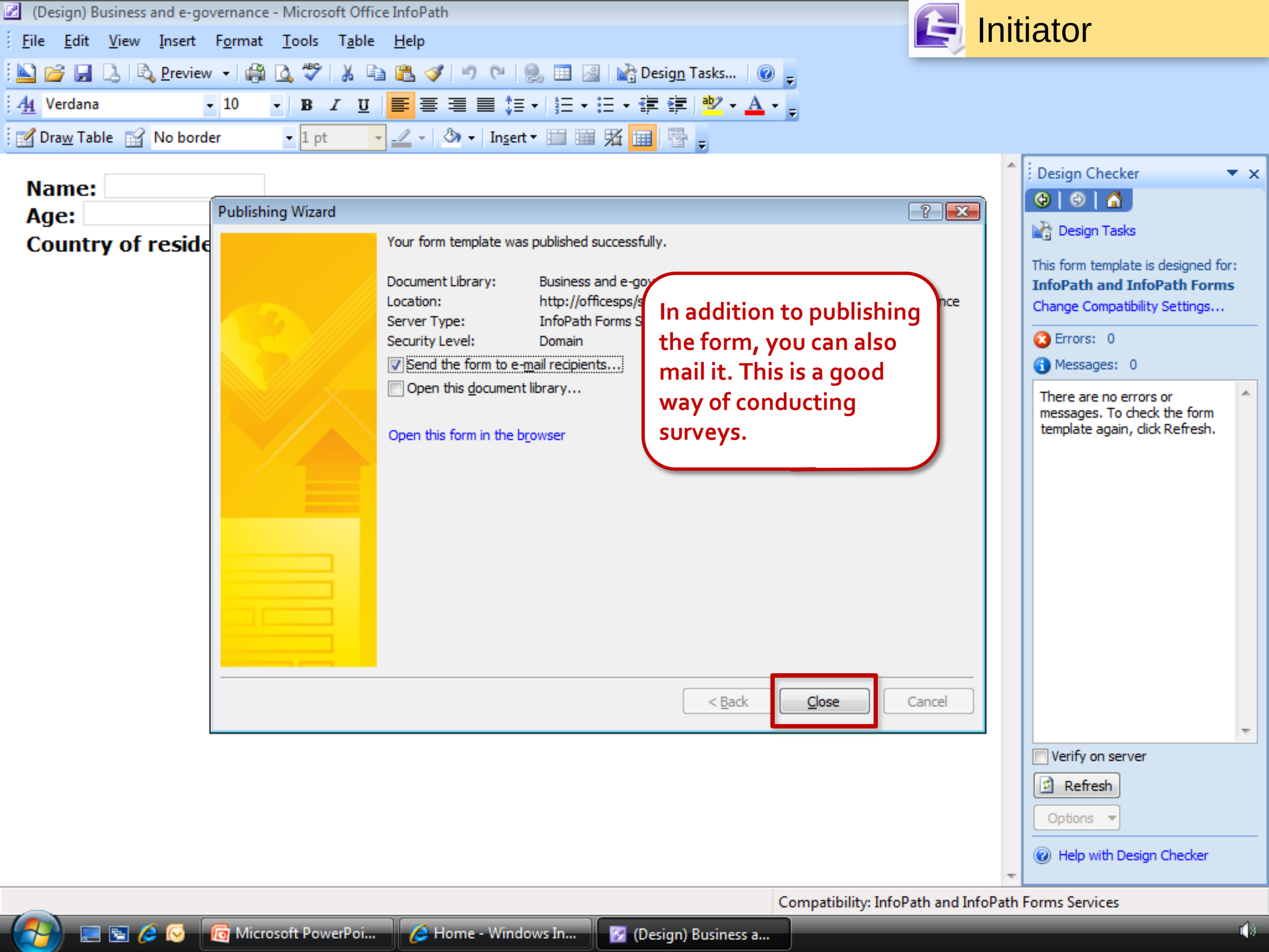

(Design) Business and e-governance - Microsoft Office InfoPath
Initiator
File Edit View Insert Format Tools Table Help
Preview
Design Tasks...
Verdana
10
Draw Table
No border
1 pt
Insert
Name:
Age:
Country Of Residenc
Publishing Wizard
Where do you want to publish the form template?
To a SharePoint server with or without InfoPath Forms Services
To a list of e-mail recipients
To a network location
As an installable form template (.js or .msi file)
< Back
Next >
Cancel
Design Checker
Design Tasks
This form template is designed for:
InfoPath and InfoPath Forms
Change Compatibility Settings...
Errors: 0
Messages: 0
There are no errors or messages. To check the form template again, click Refresh.
Verify on server
Refresh
Options
Help with Design Checker
Compatibility: InfoPath and InfoPath Forms Services
Microsoft PowerPoi...
(Design) Business a...


(Design) Business and e-governance - Microsoft Office InfoPath
Initiator
File Edit View Insert Format Tools Table Help
Preview
Design Tasks...
Verdana
10
Draw Table
No border
1 pt
Insert
Name:
Age:
Country Of Residenc
Publishing Wizard
Enter the location of your SharePoint or InfoPath Forms Services site:
http://officesps/SiteDirectory/democontent
Example: http://www.example.com
This is the URL of the base SharePoint Site
< Back
Next >
Cancel
Design Checker
Design Tasks
This form template is designed for:
InfoPath and InfoPath Forms
Change Compatibility Settings...
Errors: 0
Messages: 0
There are no errors or messages. To check the form template again, click Refresh.
Verify on server
Refresh
Options
Help with Design Checker
Compatibility: InfoPath and InfoPath Forms Services
Microsoft PowerPoi...
(Design) Business a...

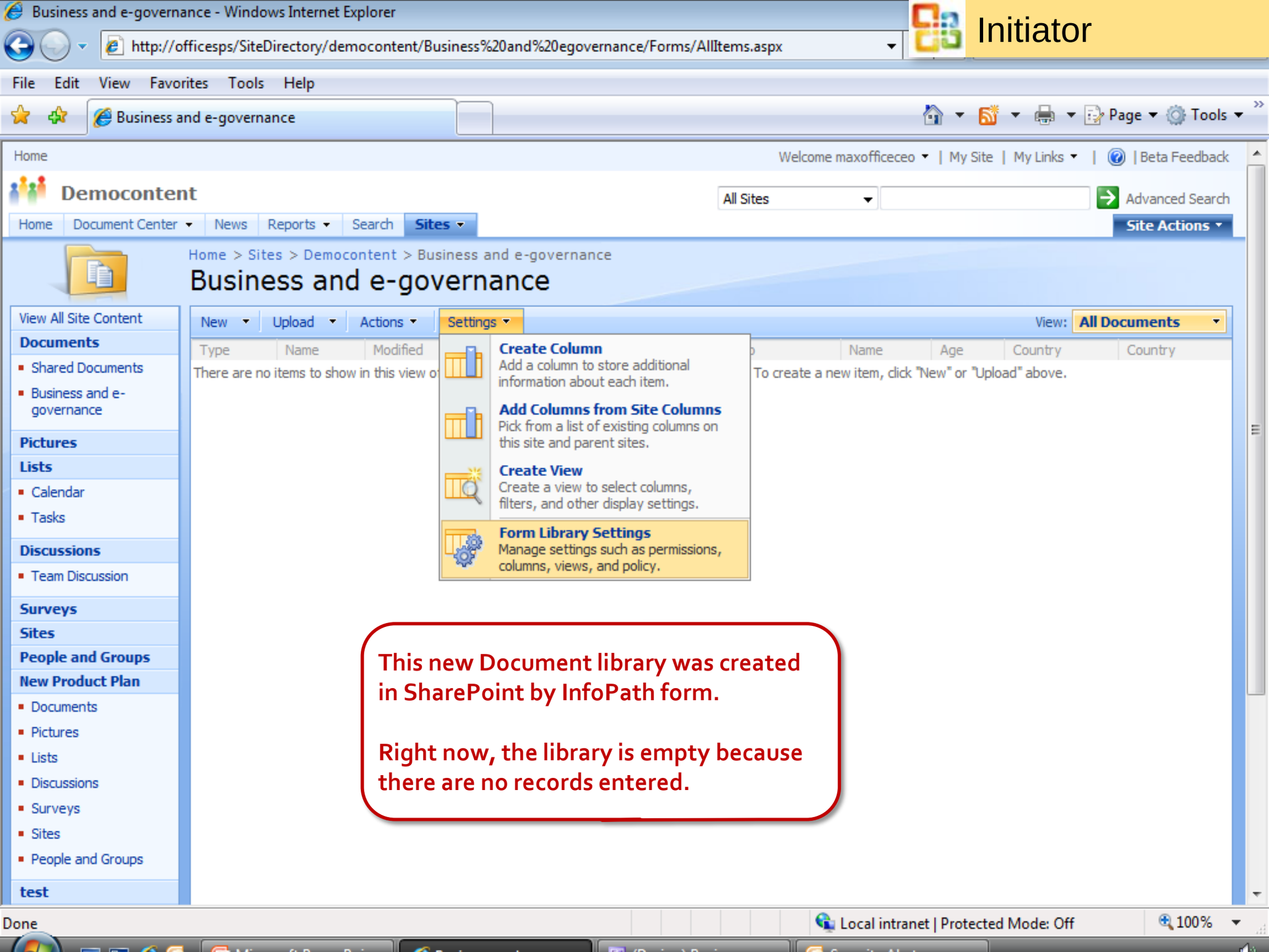

(Design) Business and e-governance - Microsoft Office InfoPath
Initiator
File Edit View Insert Format Tools Table Help
Preview
Design Tasks...
Verdana
10
Draw Table
No border
1 pt
Insert
Name:
Age:
Country Of Residenc
Publishing Wizard
Enable this form to be filled out by using a browser
What do you want to create or modify?
Document Library
Publish this form template as a template in a document library. A document library stores forms based on this form template. Users can open and fill out forms in the library. You can specify which fields in the template appear as columns in the library.
Site Content Type (advanced)
A site content type allows this form template to be used in multiple libraries and sites. You can specify which fields in the template appear as columns in the library.
Administrator-approved form template (advanced)
Prepare this form template for an administrator approval.
< Back
Next >
Cancel
We will publish the form to a simple Document Library
Design Checker
Design Tasks
InfoPath Forms
There are no errors or messages. To check the form template again, click Refresh.
Verify on server
Refresh
Options
Help with Design Checker
Compatibility: InfoPath and InfoPath Forms Services
Microsoft PowerPoi...
(Design) Business a...

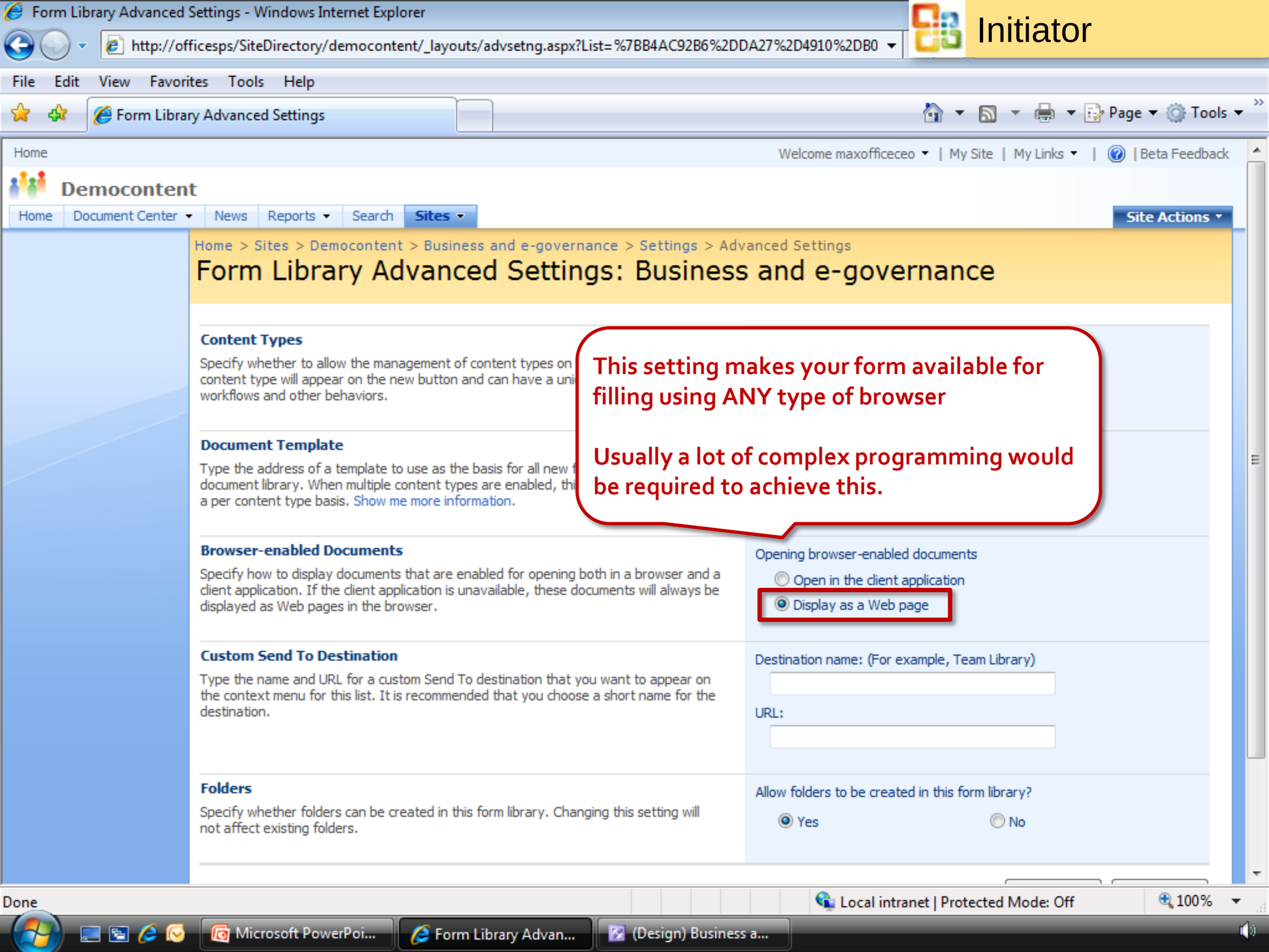

(Design) Business and e-governance - Microsoft Office InfoPath
Initiator
File Edit View Insert Format Tools Table Help
Preview
Design Tasks...
Verdana
10
Draw Table
No border
1 pt
Insert
Name:
Age:
Country of reside
Publishing Wizard
What do you want to do?
Create a new document library
Update the form template in an existing document library
Document library to update:
Name
Description
Shared Documents
Share a document with the team by a...
< Back
Next >
Cancel
As this is the first time we are publishing the form, we will create a new library.
Design Checker
Design Tasks
form template is designed for:
oPath and InfoPath Forms
nge Compatibility Settings...
Errors: 0
Messages: 0
There are no errors or messages. To check the form template again, click Refresh.
Verify on server
Refresh
Options
Help with Design Checker
Compatibility: InfoPath and InfoPath Forms Services
Microsoft PowerPoi...
Home - Windows In...
(Design) Business a...


(Design) Business and e-governance - Microsoft Office InfoPath
Initiator
File Edit View Insert Format Tools Table Help
Preview
Design Tasks...
Verdana
10
Draw Table
No border
1 pt
Insert
Name:
Age:
Country of reside
Name
Publishing Wizard
Select a Field or Group
Field to display as column:
myFields
Name
Age
Country
Site column group:
(None: Create new column in this library)
Column name:
Age
Function:
Allow users to edit data in this field by using a datasheet or properties page
OK
Cancel
< Back
Next >
Cancel
We can choose the information we want to see when users start filling the forms online
Design Checker
Design Tasks
This form template is designed for:
InfoPath and InfoPath Forms
Change Compatibility Settings...
Errors: 0
Messages: 0
There are no errors or messages. To check the form template again, click Refresh.
Verify on server
Refresh
Options
Help with Design Checker
Compatibility: InfoPath and InfoPath Forms Services
Microsoft PowerPoi...
Home - Windows In...
(Design) Business a...


(Design) Business and e-governance - Microsoft Office InfoPath
Initiator
File Edit View Insert Format Tools Table Help
Preview
Design Tasks...
Verdana
10
Draw Table
No border
1 pt
Insert
Name:
Age:
Country of reside
Publishing Wizard
Your form template was published successfully.
Document Library: Business and e-gov
Location: http://officesps/s
Server Type: InfoPath Forms S
Security Level: Domain
Send the form to e-mail recipients...
Open this document library...
Open this form in the browser
In addition to publishing the form, you can also mail it. This is a good way of conducting surveys.
< Back
Close
Cancel
Design Checker
Design Tasks
This form template is designed for:
InfoPath and InfoPath Forms
Change Compatibility Settings...
Errors: 0
Messages: 0
There are no errors or messages. To check the form template again, click Refresh.
Verify on server
Refresh
Options
Help with Design Checker
Compatibility: InfoPath and InfoPath Forms Services
Microsoft PowerPoi...
Home - Windows In...
(Design) Business a...

Make the form available for editing from any browser

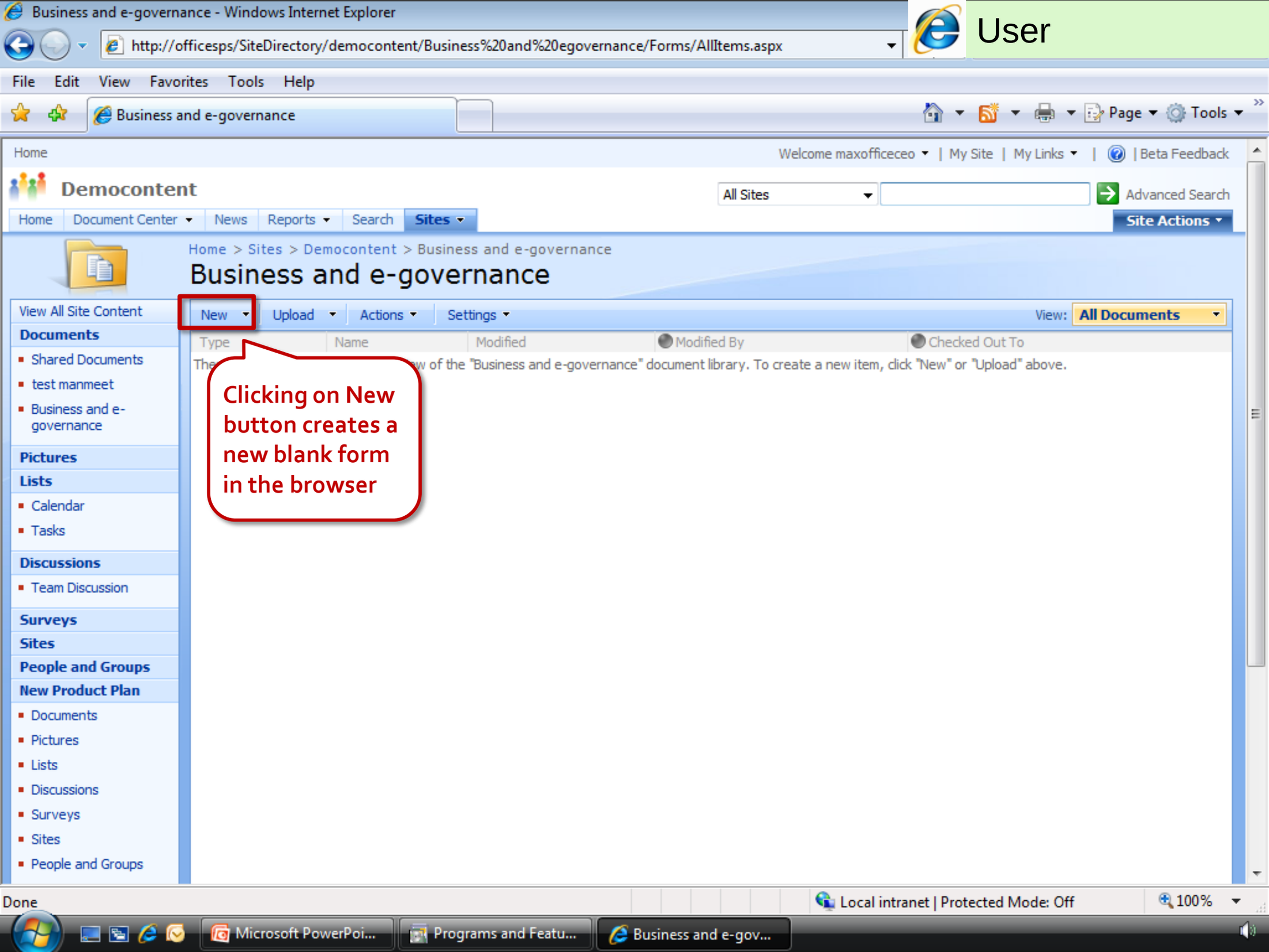

Business and e-governance - Windows Internet Explorer
http://officesps/SiteDirectory/democontent/Business%20and%20egovernance/Forms/AllItems.aspx
Initiator
File Edit View Favorites Tools Help
Business and e-governance
Page Tools
Home
Welcome maxofficeceo | My Site | My Links | Beta Feedback
Democontent
All Sites
Advanced Search
Home Document Center News Reports Search Sites
Site Actions
Home > Sites > Democontent > Business and e-governance
Business and e-governance
View All Site Content
Documents
Shared Documents
Business and e-governance
Pictures
Lists
Calendar
Tasks
Discussions
Team Discussion
Surveys
Sites
People and Groups
New Product Plan
Documents
Pictures
Lists
Discussions
Surveys
Sites
People and Groups
test
New Upload Actions Settings
View: All Documents
Type Name Modified
Name Age Country Country
There are no items to show in this view of
To create a new item, click "New" or "Upload" above.
Create Column
Add a column to store additional information about each item.
Add Columns from Site Columns
Pick from a list of existing columns on this site and parent sites.
Create View
Create a view to select columns, filters, and other display settings.
Form Library Settings
Manage settings such as permissions, columns, views, and policy.
This new Document library was created in SharePoint by InfoPath form.
Right now, the library is empty because there are no records entered.
Done
Local intranet | Protected Mode: Off
100%

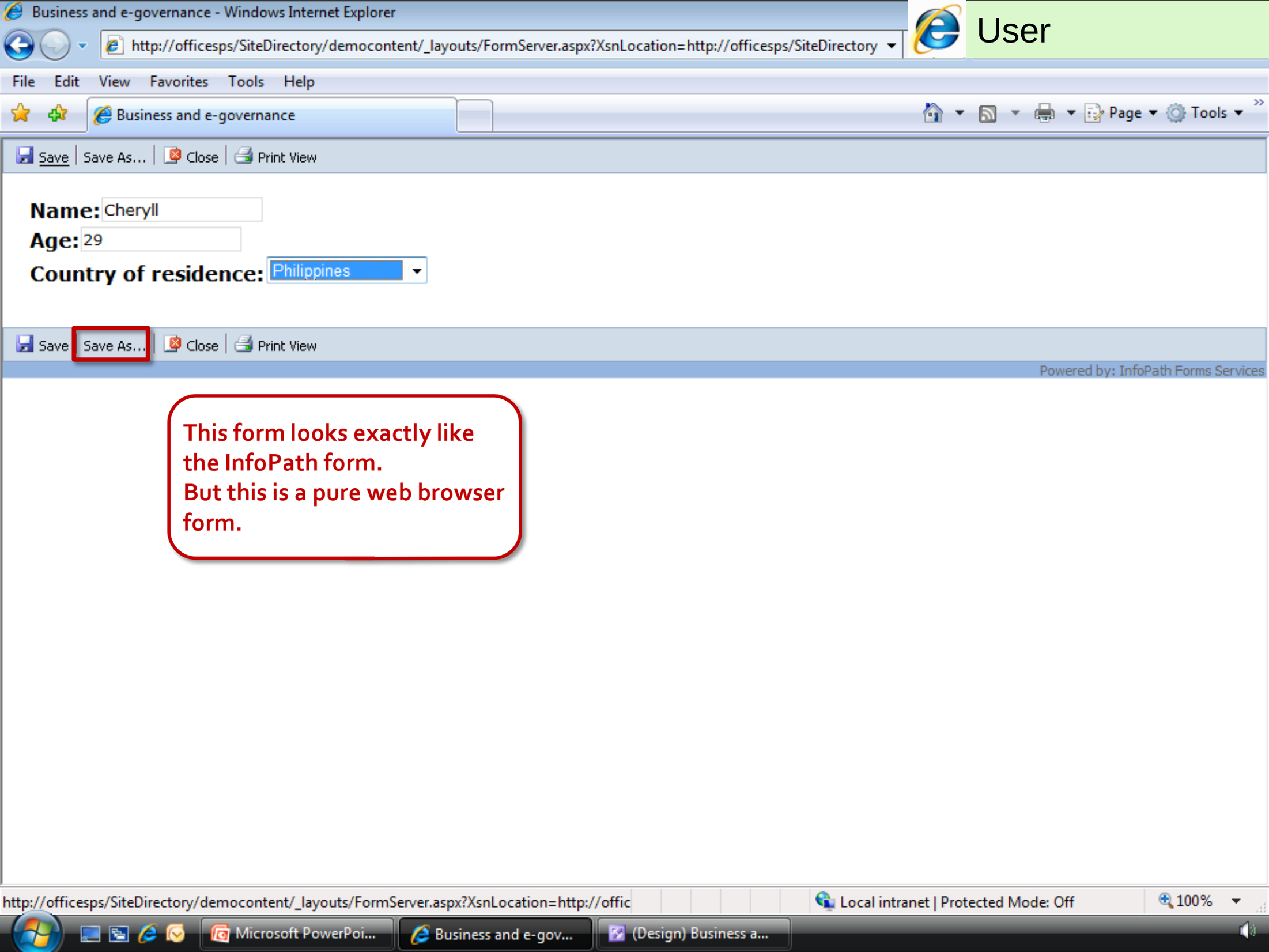

Form Library Advanced Settings - Windows Internet Explorer
Initiator
http://officesps/SiteDirectory/democontent/_layouts/advsetng.aspx?List=%7BB4AC92B6%2DDA27%2D4910%2DB0
File Edit View Favorites Tools Help
Form Library Advanced Settings
Page Tools
Home
Welcome maxofficeceo | My Site | My Links | Beta Feedback
Democontent
Home Document Center News Reports Search Sites
Site Actions
Home > Sites > Democontent > Business and e-governance > Settings > Advanced Settings
Form Library Advanced Settings: Business and e-governance
Content Types
Specify whether to allow the management of content types on
content type will appear on the new button and can have a uni
workflows and other behaviors.
Document Template
Type the address of a template to use as the basis for all new
document library. When multiple content types are enabled, thi
a per content type basis. Show me more information.
This setting makes your form available for filling using ANY type of browser
Usually a lot of complex programming would be required to achieve this.
Browser-enabled Documents
Specify how to display documents that are enabled for opening both in a browser and a client application. If the client application is unavailable, these documents will always be displayed as Web pages in the browser.
Opening browser-enabled documents
Open in the client application
Display as a Web page
Custom Send To Destination
Type the name and URL for a custom Send To destination that you want to appear on the context menu for this list. It is recommended that you choose a short name for the destination.
Destination name: (For example, Team Library)
URL:
Folders
Specify whether folders can be created in this form library. Changing this setting will not affect existing folders.
Allow folders to be created in this form library?
Yes
No
Done
Local intranet | Protected Mode: Off
100%
Microsoft PowerPoi...
Form Library Advan...
(Design) Business a...

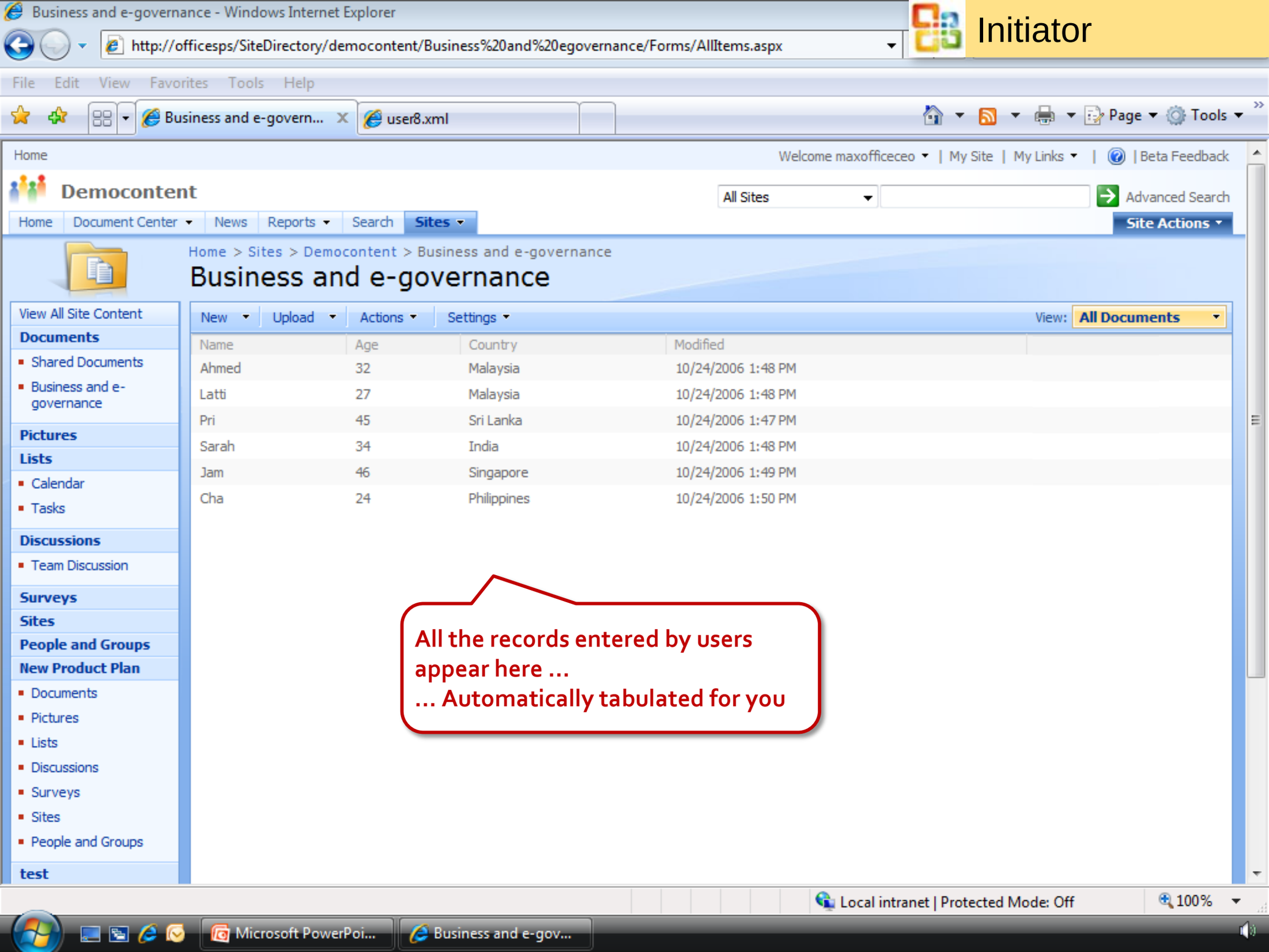
Filling in the form

Send or Publish the URL of the SharePoint library to target users

Users can now fill the form using any browser

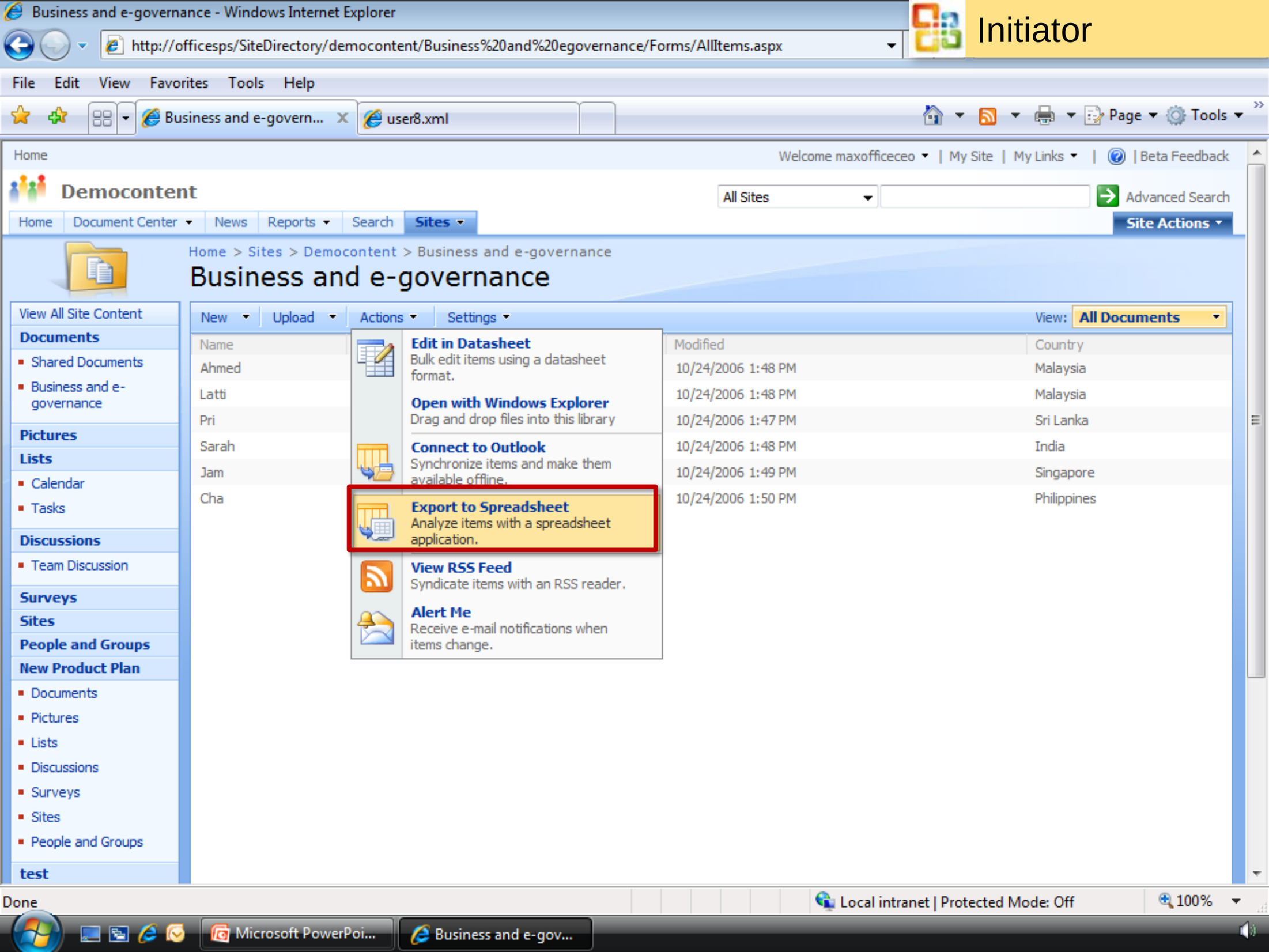

Business and e-governance - Windows Internet Explorer
User
http://officesps/SiteDirectory/democontent/Business%20and%20egovernance/Forms/AllItems.aspx
File Edit View Favorites Tools Help
Business and e-governance
Page Tools
Home
Welcome maxofficeceo | My Site | My Links | Beta Feedback
Democontent
All Sites
Advanced Search
Home Document Center News Reports Search Sites
Site Actions
Home > Sites > Democontent > Business and e-governance
Business and e-governance
View All Site Content
Documents
Shared Documents
test manmeet
Business and e-governance
Pictures
Lists
Calendar
Tasks
Discussions
Team Discussion
Surveys
Sites
People and Groups
New Product Plan
Documents
Pictures
Lists
Discussions
Surveys
Sites
People and Groups
New
Upload
Actions
Settings
View: All Documents
Type
Name
Modified
Modified By
Checked Out To
The w of the "Business and e-governance" document library. To create a new item, click "New" or "Upload" above.
Clicking on New button creates a new blank form in the browser
Done
Local intranet | Protected Mode: Off
100%
Microsoft PowerPoi...
Programs and Featu...
Business and e-gov...

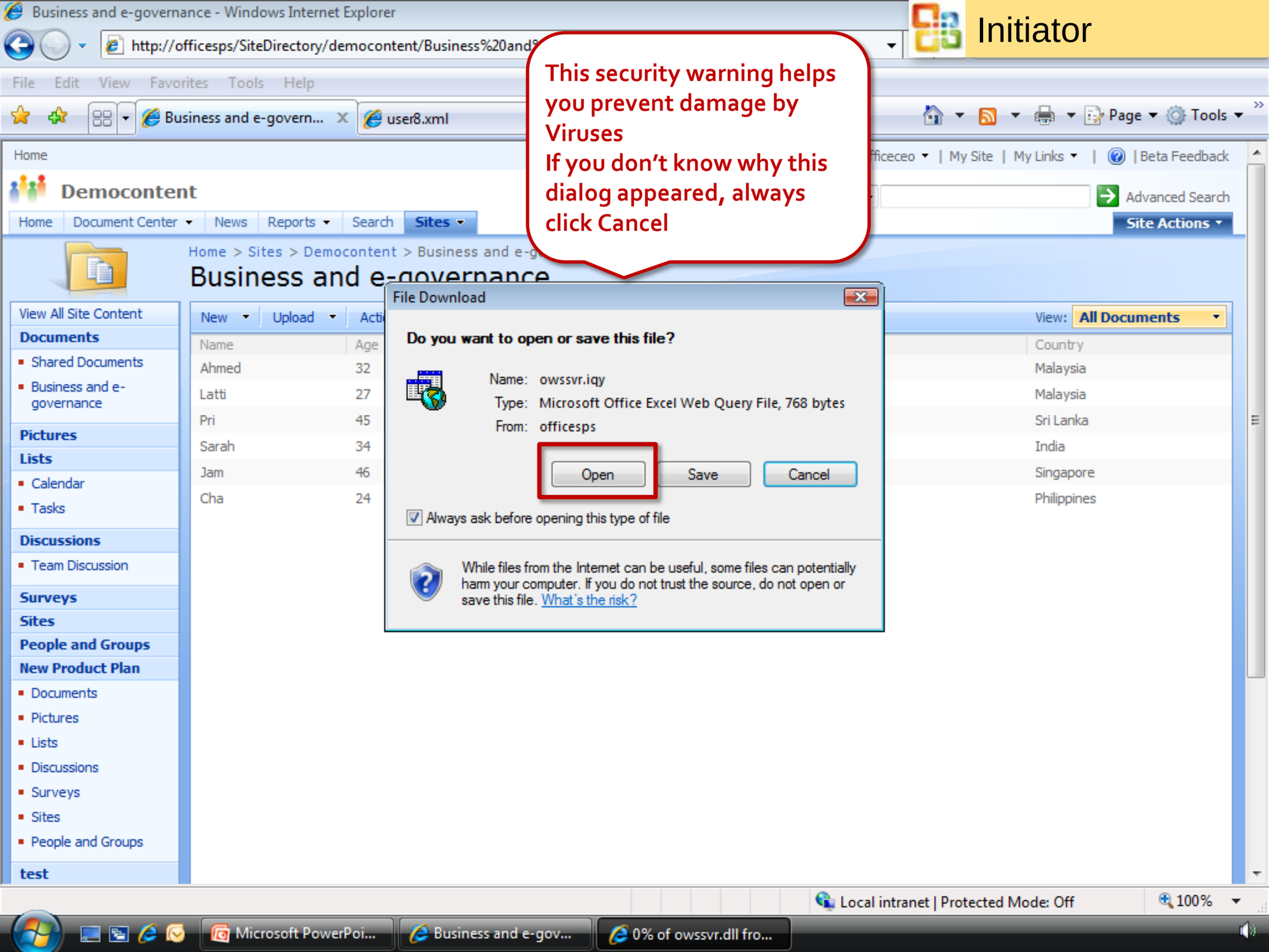

Business and e-governance - Windows Internet Explorer
http://officesps/SiteDirectory/democontent/_layouts/FormServer.aspx?XsnLocation=http://officesps/SiteDirectory
User
File Edit View Favorites Tools Help
Business and e-governance
Page Tools
Save Save As... Close Print View
Name: Cheryll
Age: 29
Country of residence: Philippines
Save Save As... Close Print View
Powered by: InfoPath Forms Services
This form looks exactly like the InfoPath form.
But this is a pure web browser form.
http://officesps/SiteDirectory/democontent/_layouts/FormServer.aspx?XsnLocation=http://offic
Local intranet | Protected Mode: Off
100%
Microsoft PowerPoi...
Business and e-gov...
(Design) Business a...

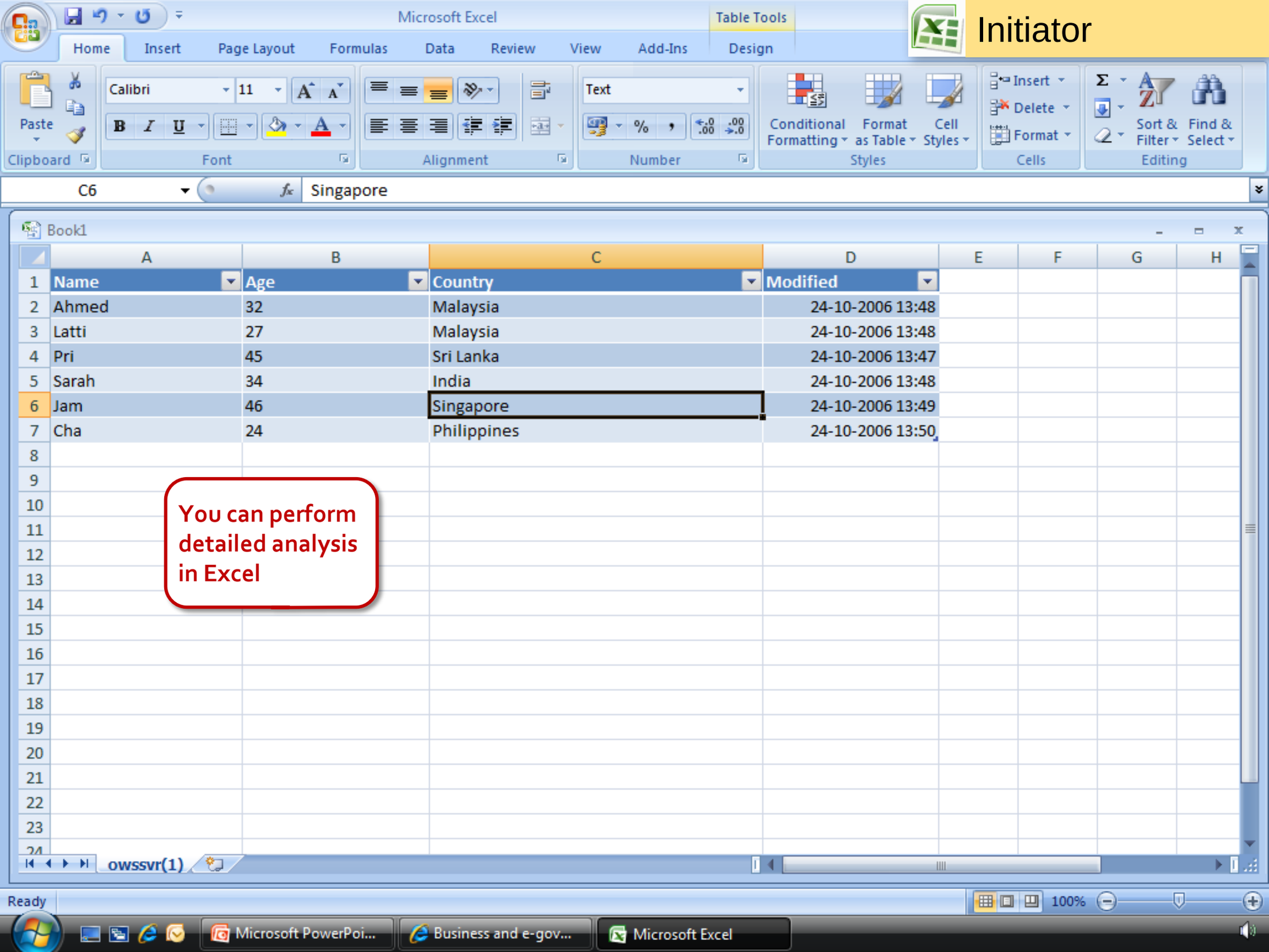

Business and e-governance - Windows Internet Explorer
http://officesps/SiteDirectory/democontent/Business%20and%20egovernance/Forms/AllItems.aspx
Initiator
File Edit View Favorites Tools Help
Business and e-govern...
user8.xml
Page
Tools
Home
Welcome maxofficeceo | My Site | My Links | Beta Feedback
Democontent
All Sites
Advanced Search
Home Document Center News Reports Search Sites
Site Actions
Home > Sites > Democontent > Business and e-governance
Business and e-governance
View All Site Content
Documents
Shared Documents
Business and e-governance
Pictures
Lists
Calendar
Tasks
Discussions
Team Discussion
Surveys
Sites
People and Groups
New Product Plan
Documents
Pictures
Lists
Discussions
Surveys
Sites
People and Groups
test
New Upload Actions Settings
View: All Documents
Name Age Country Modified
Ahmed 32 Malaysia 10/24/2006 1:48 PM
Latti 27 Malaysia 10/24/2006 1:48 PM
Pri 45 Sri Lanka 10/24/2006 1:47 PM
Sarah 34 India 10/24/2006 1:48 PM
Jam 46 Singapore 10/24/2006 1:49 PM
Cha 24 Philippines 10/24/2006 1:50 PM
All the records entered by users appear here ...
... Automatically tabulated for you
Local intranet | Protected Mode: Off
100%
Microsoft PowerPoi...
Business and e-gov...

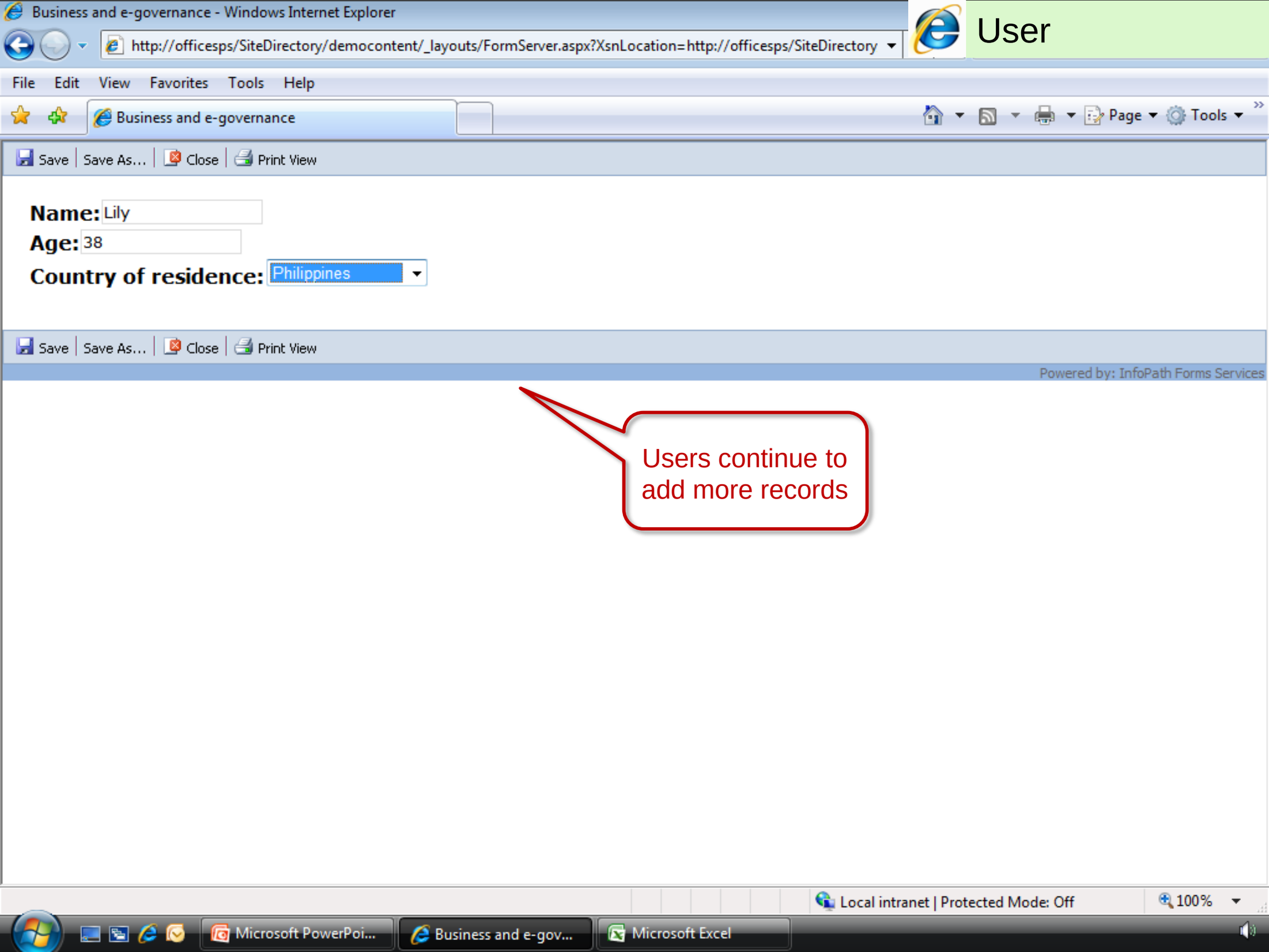
How to use and analyse this information?

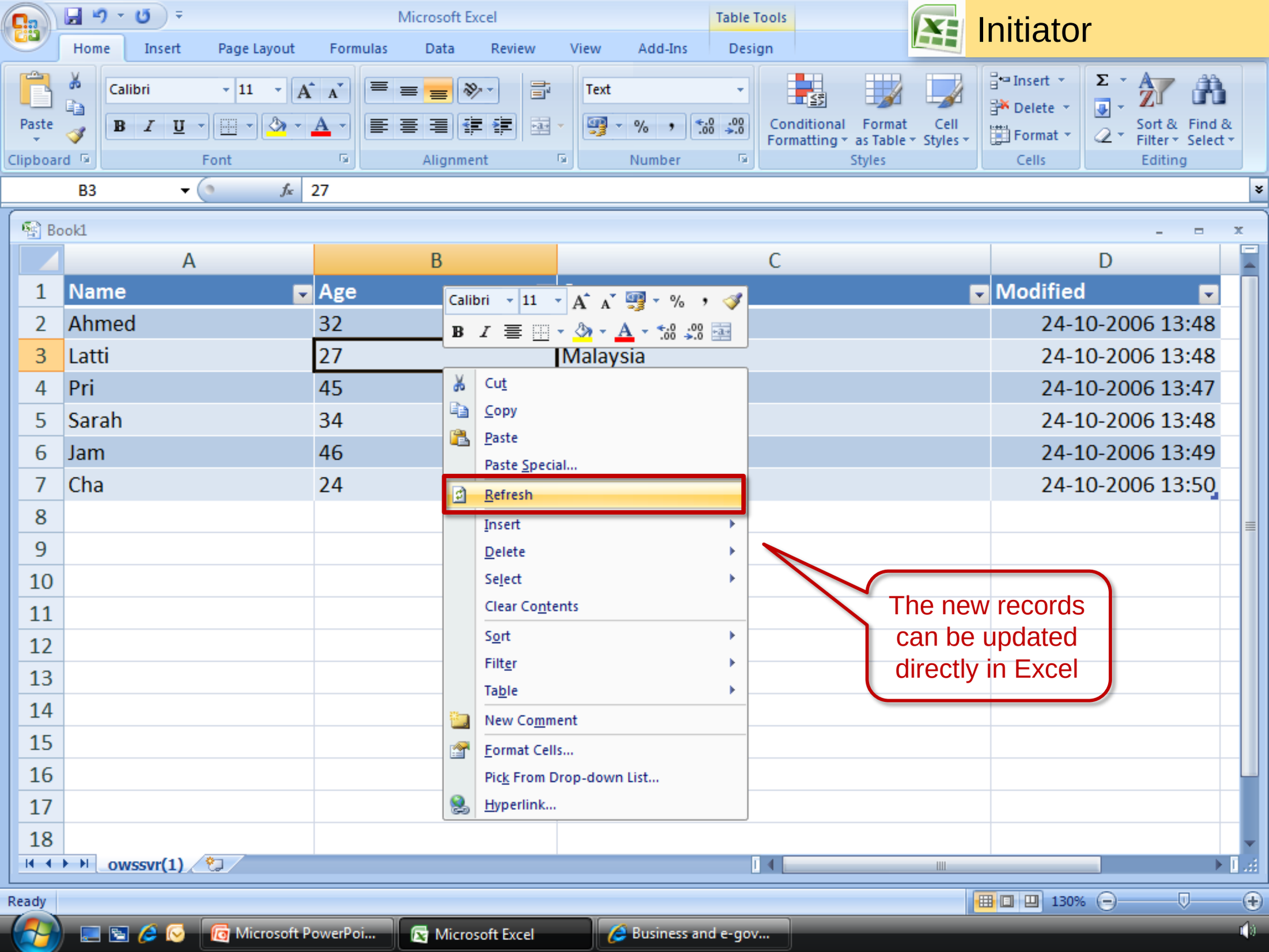
Sorting, Filtering and Grouping can be done in SharePoint itself

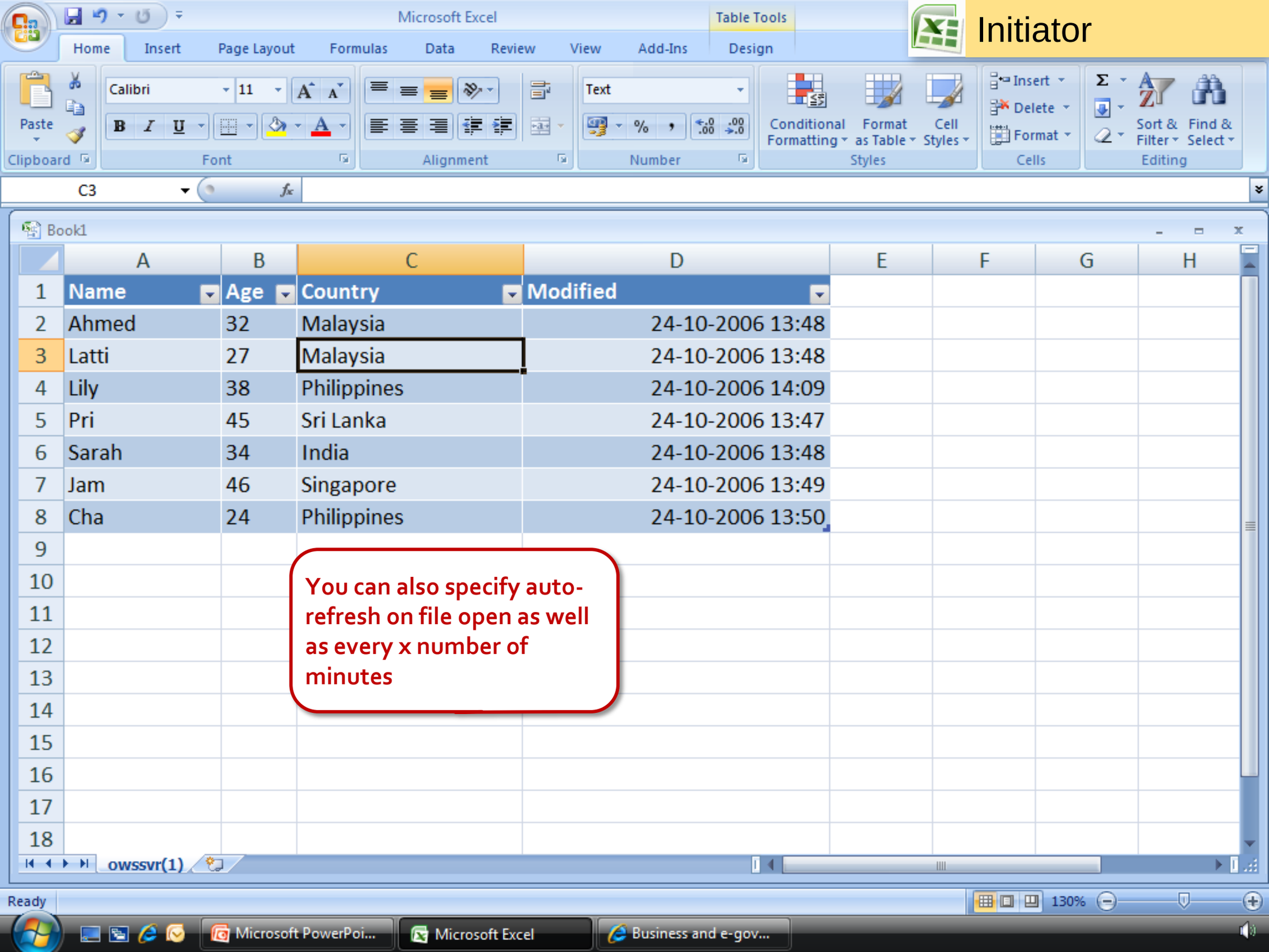

Business and e-governance - Windows Internet Explorer
http://officesps/SiteDirectory/democontent/Business%20and%20egovernance/Forms/AllItems.aspx
Initiator
File Edit View Favorites Tools Help
Business and e-govern...
user8.xml
Page Tools
Home
Welcome maxofficeceo | My Site | My Links | Beta Feedback
Democontent
All Sites
Advanced Search
Home Document Center News Reports Search Sites
Site Actions
Home > Sites > Democontent > Business and e-governance
Business and e-governance
View All Site Content
Documents
Shared Documents
Business and e-governance
Pictures
Lists
Calendar
Tasks
Discussions
Team Discussion
Surveys
Sites
People and Groups
New Product Plan
Documents
Pictures
Lists
Discussions
Surveys
Sites
People and Groups
test
New Upload Actions Settings
View: All Documents
Edit in Datasheet
Bulk edit items using a datasheet format.
Open with Windows Explorer
Drag and drop files into this library
Connect to Outlook
Synchronize items and make them available offline.
Export to Spreadsheet
Analyze items with a spreadsheet application.
View RSS Feed
Syndicate items with an RSS reader.
Alert Me
Receive e-mail notifications when items change.
Name
Modified
Country
Ahmed 10/24/2006 1:48 PM Malaysia
Latti 10/24/2006 1:48 PM Malaysia
Pri 10/24/2006 1:47 PM Sri Lanka
Sarah 10/24/2006 1:48 PM India
Jam 10/24/2006 1:49 PM Singapore
Cha 10/24/2006 1:50 PM Philippines
Done
Local intranet | Protected Mode: Off
100%
Microsoft PowerPoi...
Business and e-gov...


Initiator
This security warning helps you prevent damage by Viruses
If you don't know why this dialog appeared, always click Cancel
Business and e-governance - Windows Internet Explorer
http://officesps/SiteDirectory/democontent/Business%20and
File Edit View Favorites Tools Help
Business and e-govern...
user8.xml
Page Tools
Home
My Site | My Links | Beta Feedback
Democontent
Advanced Search
Home Document Center News Reports Search Sites
Site Actions
Home > Sites > Democontent > Business and e-g
Business and e-governance
View All Site Content
Documents
Shared Documents
Business and e-governance
Pictures
Lists
Calendar
Tasks
Discussions
Team Discussion
Surveys
Sites
People and Groups
New Product Plan
Documents
Pictures
Lists
Discussions
Surveys
Sites
People and Groups
test
New Upload
View: All Documents
Name Age Country
Ahmed 32 Malaysia
Latti 27 Malaysia
Pri 45 Sri Lanka
Sarah 34 India
Jam 46 Singapore
Cha 24 Philippines
File Download
Do you want to open or save this file?
Name: owssvr.iqy
Type: Microsoft Office Excel Web Query File, 768 bytes
From: officesps
Open
Save
Cancel
Always ask before opening this type of file
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?
Local intranet | Protected Mode: Off
100%
Microsoft PowerPoi...
Business and e-gov...
0% of owssvr.dll fro...


Microsoft Excel
Table Tools
Initiator
Home
Insert
Page Layout
Formulas
Data
Review
View
Add-Ins
Design
Paste
Calibri
11
Text
Conditional Formatting
Format as Table
Cell Styles
Insert
Delete
Format
Sort & Filter
Find & Select
Clipboard
Font
Alignment
Number
Styles
Cells
Editing
C6
Singapore
Book1
Name
Age
Country
Modified
Ahmed
32
Malaysia
24-10-2006 13:48
Latti
27
Malaysia
24-10-2006 13:48
Pri
45
Sri Lanka
24-10-2006 13:47
Sarah
34
India
24-10-2006 13:48
Jam
46
Singapore
24-10-2006 13:49
Cha
24
Philippines
24-10-2006 13:50
You can perform detailed analysis in Excel
owssvr(1)
Ready
100%
Microsoft PowerPoi...
Business and e-gov...
Microsoft Excel


Business and e-governance - Windows Internet Explorer
http://officesps/SiteDirectory/democontent/_layouts/FormServer.aspx?XsnLocation=http://officesps/SiteDirectory
User
File Edit View Favorites Tools Help
Business and e-governance
Page Tools
Save Save As... Close Print View
Name: Lily
Age: 38
Country of residence: Philippines
Save Save As... Close Print View
Powered by: InfoPath Forms Services
Users continue to add more records
Local intranet | Protected Mode: Off
100%
Microsoft PowerPoi...
Business and e-gov...
Microsoft Excel


Initiator
Microsoft Excel
Table Tools
Home
Insert
Page Layout
Formulas
Data
Review
View
Add-Ins
Design
Paste
Clipboard
Calibri
11
Font
Alignment
Text
Number
Conditional Formatting
Format as Table
Cell Styles
Styles
Insert
Delete
Format
Cells
Sort & Filter
Find & Select
Editing
B3
27
Book1
Name
Age
Modified
Ahmed
32
24-10-2006 13:48
Latti
27
Malaysia
24-10-2006 13:48
Pri
45
24-10-2006 13:47
Sarah
34
24-10-2006 13:48
Jam
46
24-10-2006 13:49
Cha
24
24-10-2006 13:50
Cut
Copy
Paste
Paste Special...
Refresh
Insert
Delete
Select
Clear Contents
Sort
Filter
Table
New Comment
Format Cells...
Pick From Drop-down List...
Hyperlink...
The new records can be updated directly in Excel
owssvr(1)
Ready
130%
Microsoft PowerPoi...
Microsoft Excel
Business and e-gov...


Microsoft Excel
Table Tools
Initiator
Home
Insert
Page Layout
Formulas
Data
Review
View
Add-Ins
Design
Paste
Calibri
11
Text
Conditional Formatting
Format as Table
Cell Styles
Insert
Delete
Format
Sort & Filter
Find & Select
Clipboard
Font
Alignment
Number
Styles
Cells
Editing
C3
Book1
Name
Age
Country
Modified
Ahmed
32
Malaysia
24-10-2006 13:48
Latti
27
Malaysia
24-10-2006 13:48
Lily
38
Philippines
24-10-2006 14:09
Pri
45
Sri Lanka
24-10-2006 13:47
Sarah
34
India
24-10-2006 13:48
Jam
46
Singapore
24-10-2006 13:49
Cha
24
Philippines
24-10-2006 13:50
You can also specify auto-refresh on file open as well as every x number of minutes
owssvr(1)
Ready
130%
Microsoft PowerPoi...
Microsoft Excel
Business and e-gov...

Benefits of this approach

- Anyone can create forms on their own
- Forms can be very sophisticated, yet no programming skill is required
- Data does not need to be re-entered for analysis
- Users can analyse data at any point in time
- Only valid users can fill in data
- Confidentiality of information is always maintained

Microsoft® Office

Further thoughts

- On submitting the form, you can start a business workflow (approving leave, finalizing a document, taking consensus, resolving a technical support question, etc)
- The form can have validations and business logic built in (requires programming)
- The data can be posted in your corporate database instead of remaining in Microsoft Office SharePoint Server

When to use Microsoft Office InfoPath forms?

- Internal surveys
- Customer / vendor surveys
- Application / registration forms
- Tender / procurement bid forms
- Helpdesk call logging
- Feedback about company, products, events…
- Business processes (order entry, expense claim…)

and more …

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