Foreword

Designing Forms for Microsoft Office InfoPath and Forms Services 2007 is written by two distinguished members of the InfoPath product team who designed, implemented, and tested many of the core features of the product. I was delighted when I learned that Scott Roberts and Hagen Green had decided to share their experience this way: Scott was deeply involved in the creation of the Forms Design experience in InfoPath, while Hagen provided deep contributions to the creation of InfoPath Forms Services.

This book is an excellent hands-on introduction to Microsoft Office InfoPath, which represents a revolutionary leap in XML editing technologies and a new paradigm for gathering business-critical information. A wide variety of audiences will appreciate the information provided in this book: Information workers will learn how to design InfoPath forms without requiring development skills, and developers will learn how to add custom business logic to their forms and integrate them deeply to other applications.

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. This is the core vision that led to the creation of InfoPath.

What's interesting and unique about InfoPath is the type of information it allows people to gather. InfoPath lets organizations design and edit what people in my field call "semistructured" 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. XML is about creating documents in which the content is delimited, or set apart, by tags that explain the meaning of each piece of content. 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.

Numerous industries, including financial services, insurance, governments, and healthcare organizations of all sizes, are using custom-defined XML schemas to create documents with regions of meaning that are specific to their business. This allows them to reuse content across productivity applications and across other kinds of tools such as databases, workflows, and server processes. Across the world, government administrations are creating XML schemas that can represent important data related to their citizens: records such as birth certificates, housing permits, or registrations to public programs. It is important for such constituencies to enable the capture of this data by using tools that are interoperable and can reach any platform. It is in this context that the importance of the new functionalities of InfoPath 2007 and InfoPath Forms Services can be understood: Business processes are extended beyond the firewall by enabling users to complete

forms by using Web browsers such as Internet Explorer, Mozilla Firefox, and Safari or by using HTML-enabled mobile devices. Another way to collect information in an interoperable and standardized way is to capture XML data by e-mail. InfoPath 2007 enables the user to gather information using e-mail messages and to complete forms without leaving the familiar Office Outlook 2007 environment.

The XML community, which I am proud to be part of, worked on and implemented such scenarios for a very long time, but what makes InfoPath unique is how easy it is to design and deploy such forms and templates. With our vision of enabling millions of users to create and use XML information, it was extremely important to make sure that the design of the forms can be done easily without writing code while allowing experienced developers to add advanced functionality when necessary. You will learn in this book how to easily design forms by using the drag-and-drop interface of InfoPath and, for example, how to add Information Rights Management to help protect forms from inappropriate usage. If you are a developer, you will learn, for example, about the new functionality of InfoPath that enables you to use form template libraries and to add to a form prebuilt template parts that include sophisticated data connectivity features. You will also learn how to use InfoPath 2007 in conjunction with Visual Studio 2005 to incorporate InfoPath 2007 with other preexisting applications.

Microsoft's long-term vision for InfoPath is really the vision behind Microsoft's overall Web services strategy: to make it easy to create, access, and share XML data between different systems on a network. InfoPath is the first end-user product that gives information workers the capability to exploit XML and Web services. Enjoy the book!

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