

Creating Content Types When Deploying InfoPath Forms

A new feature of InfoPath 2007 is the ability to create an InfoPath form and save that form directly back to the Microsoft Office SharePoint Server 2007 server as both an InfoPath template and as a new, or existing, content type.

This section will look at how to publish an InfoPath form to a SharePoint site as both a template and new content type.

For this exercise, you will publish the InfoPath Team Status template and content type to your Litware site so it can be added as a new content type to your document library on the Fabrikam site, a child site of Litware.

1. Launch InfoPath, select the sample status report, and choose Design This Form.
2. From the File menu, select Publish. This will initiate the Publishing Wizard, as shown in Figure 1-1.

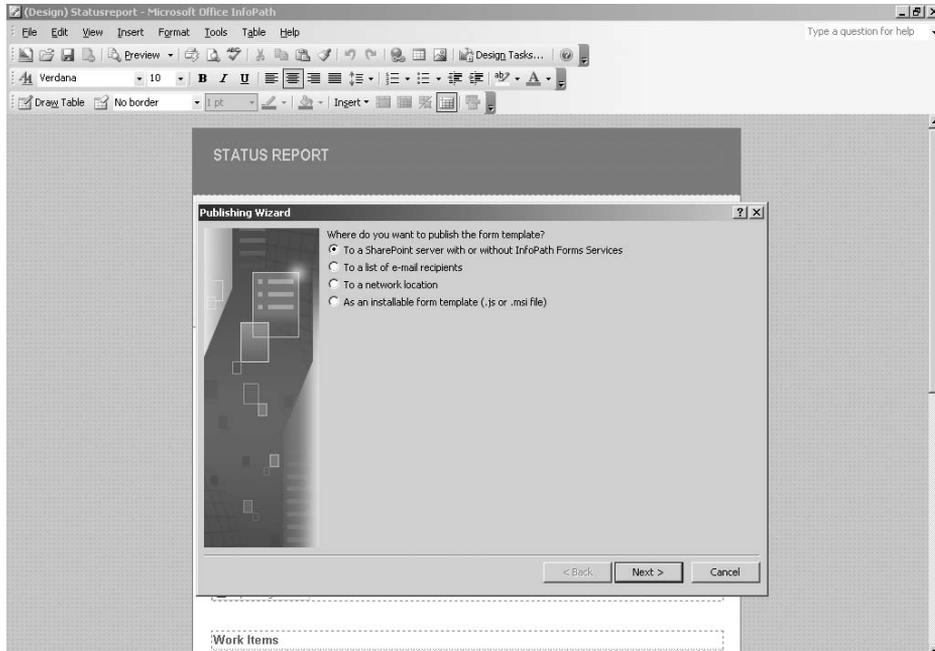


Figure 1-1 InfoPath Publishing Wizard

3. On the first screen of the Publishing Wizard, select the Publish The Form Template To A SharePoint Server With Or Without InfoPath Forms Services option.
4. Type the location of your SharePoint or InfoPath Forms Services site, as shown in Figure 1-2.

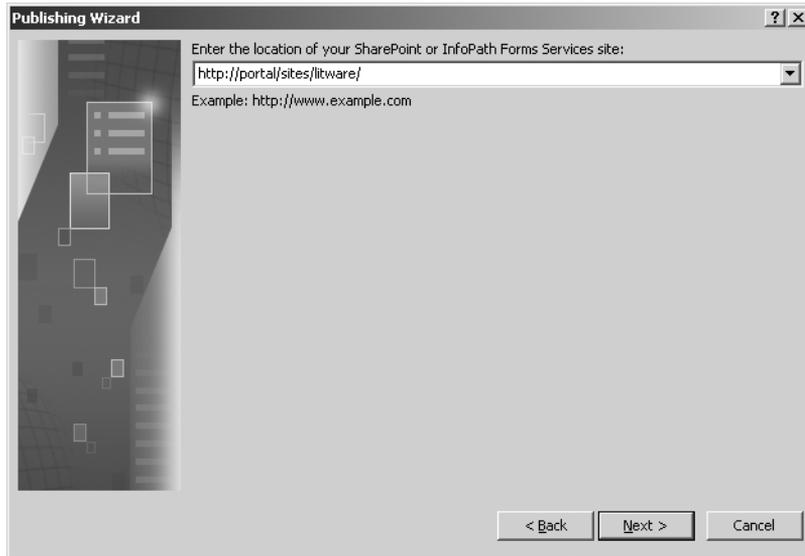


Figure 1-2 Enter location of SharePoint site

5. Select the Site Content Type (Advanced) option. Leave the Enable This Form To Be Filled Out By Using A Browser check box checked if you want to make the form accessible from the browser, as shown in Figure 1-3. Click Next.

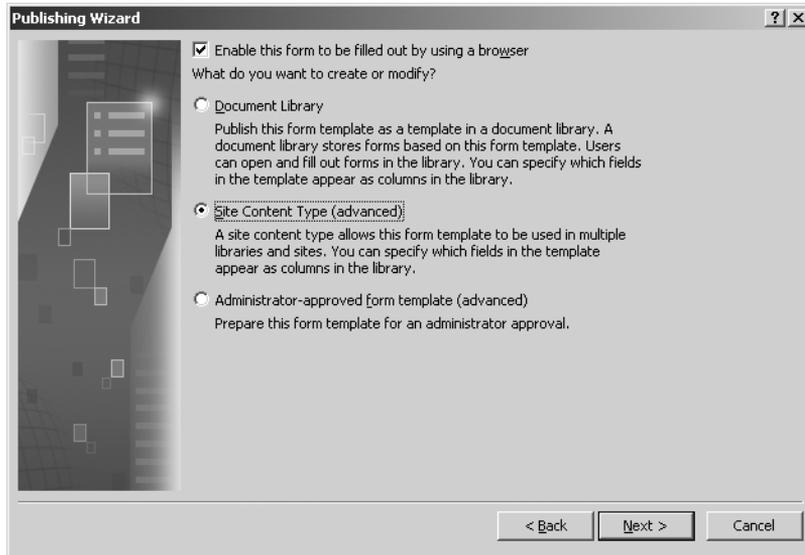


Figure 1-3 Select to publish as site content type

6. Select Create A New Content Type to create the new content type in your SharePoint site, as shown in Figure 1-4. When you choose Create A New Content Type, you will also choose the content type on which you wish to base the new content type, as denoted in the Base The Content Type On section. By default, this will be the form content type. The form content type is included in the SharePoint Site Content Type Gallery in the Document Content Types Site Content Type group. You could also choose to inherit from another content type descended from the form content type, such as the Projectexpenses content type previously created as a form template and deployed to the SharePoint site.

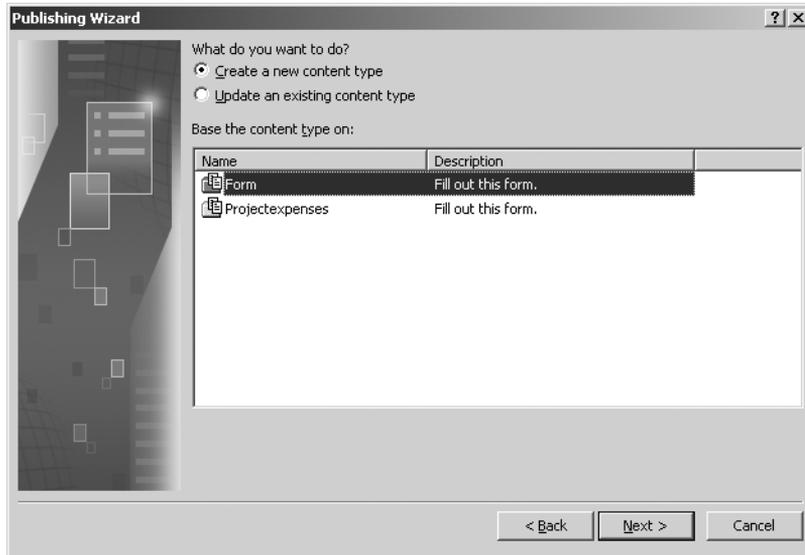


Figure 1-4 Create new or modify existing content type

7. On the next page, enter a name and description for the content type, as shown in Figure 1-5.

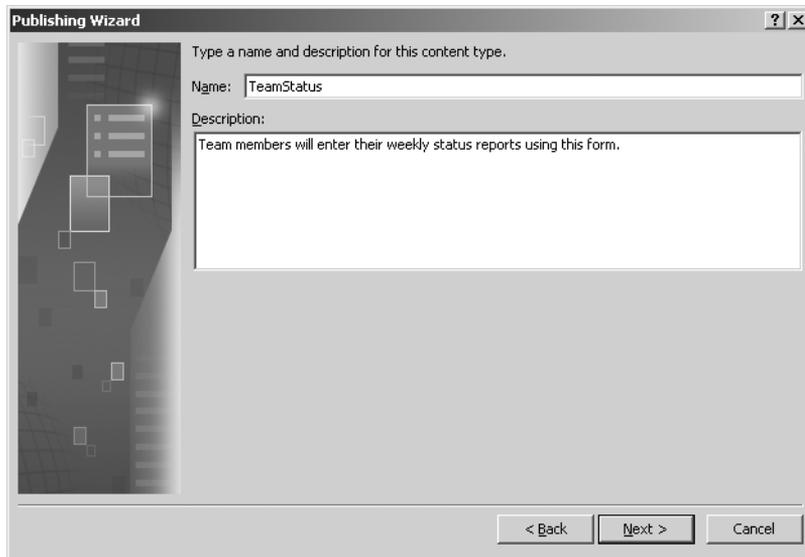


Figure 1-5 Name and description of content type

8. Add a location and file name for the template, as shown in Figure 1-6, where Litware is the site and TeamStatus is the name of the new form template. This is the template that will be published and stored on the destination SharePoint site and associated with any instances of the form content type on the SharePoint site.

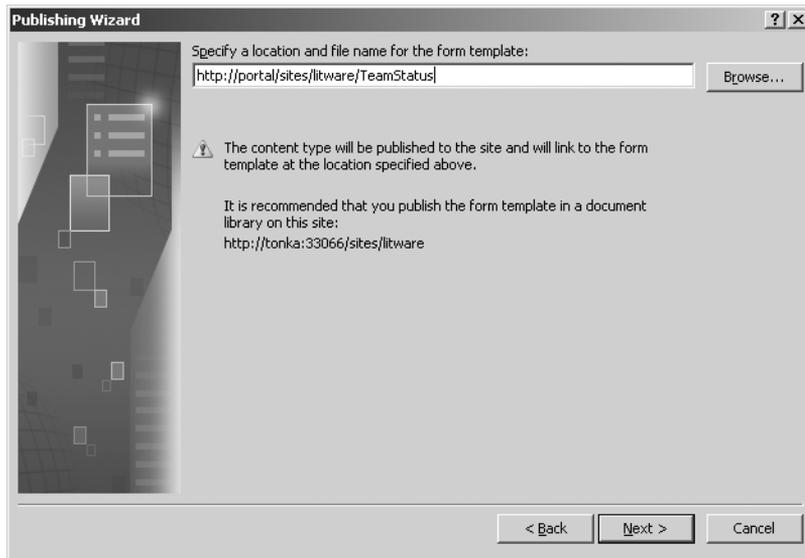


Figure 1-6 Template location and filename

9. Choose which columns you want to include with instances of the form, as shown in Figure 1-7. You can do this by accepting any default column values already promoted and included in the Column Name list or you can choose to add columns from the InfoPath form fields, or to remove or modify existing columns in the Column Name list. Once you have chosen the columns for the form, click Next.

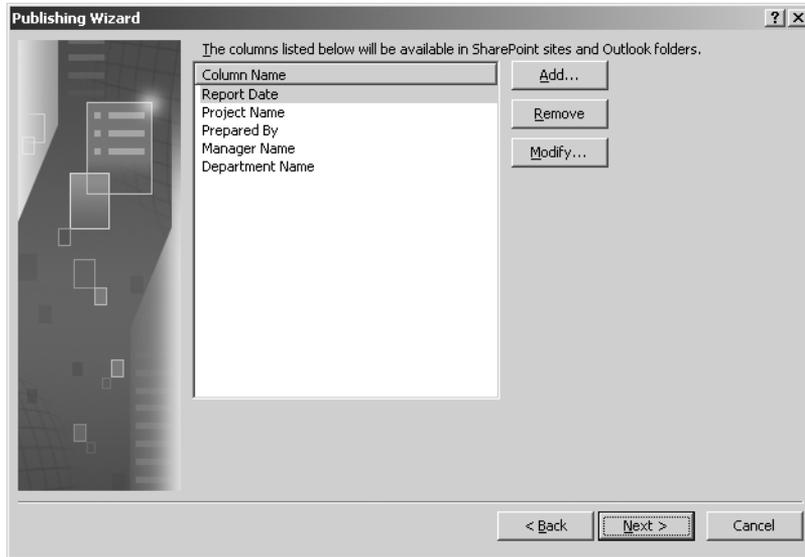


Figure 1-7 Choose site columns

A page appears asking you to verify the publishing information, as shown in Figure 1-8. Note the default security level when publishing is set at Domain level. You can change the security level on the form before attempting to publish it. For example, you may want to publish the form as a full trust form.

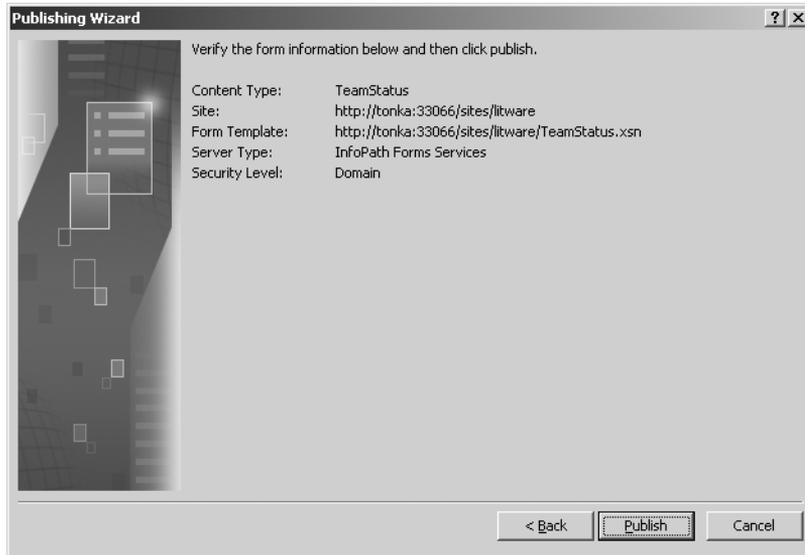


Figure 1-8 Verify publishing settings

10. Click Publish to publish the content type and template to the SharePoint site. InfoPath will attempt to connect to the InfoPath Forms Services. When it is successful, a screen confirming the publication of the form appears, as shown in Figure 1-9.

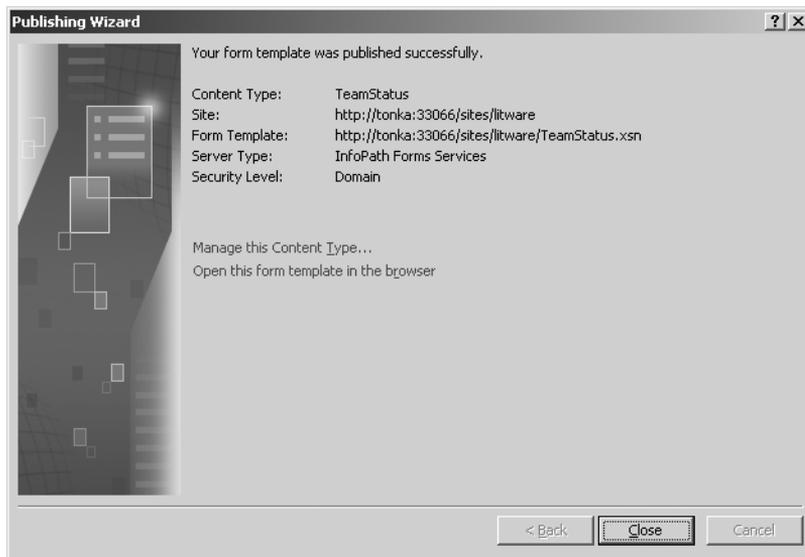


Figure 1-9 Publication of content type and template confirmed

At this point, you can choose to close the Publishing Wizard or you can click Manage This Content Type to go directly to the form's Site Content Type configuration page for the new form in SharePoint to review the settings. In Figure 1-10, note the parent of the new form is Form. SharePoint has automatically determined the new form as a child of the built-in form content type. Also, note the Columns, which include those fields from the InfoPath form you chose to include with the form at the time of publishing.

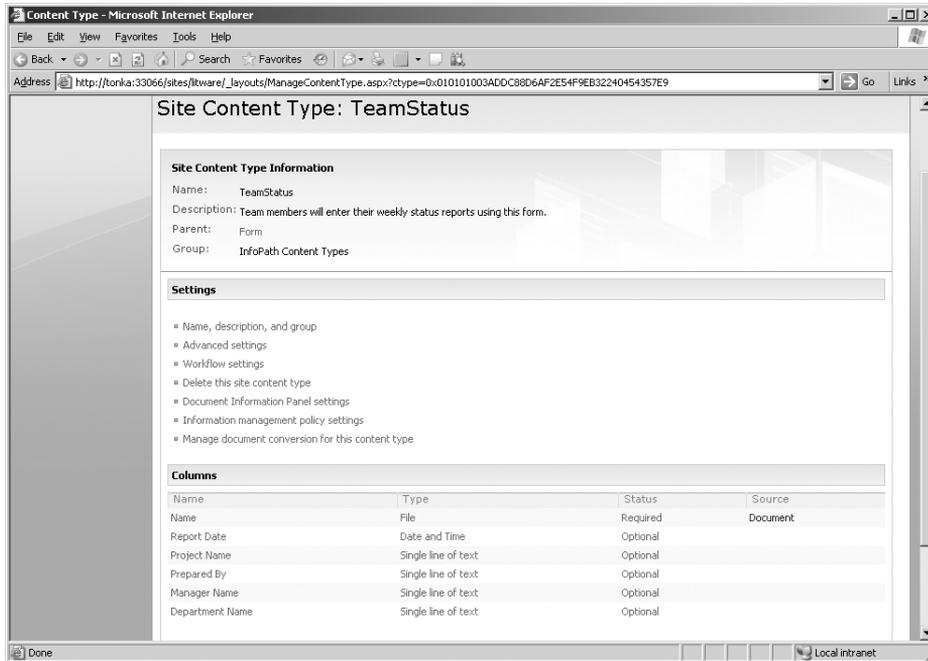


Figure 1-10 New form content type page in SharePoint site

Furthermore, SharePoint has created an additional group called InfoPath Content Types in the site's Site Content Type Gallery, as shown in Figure 1-11.

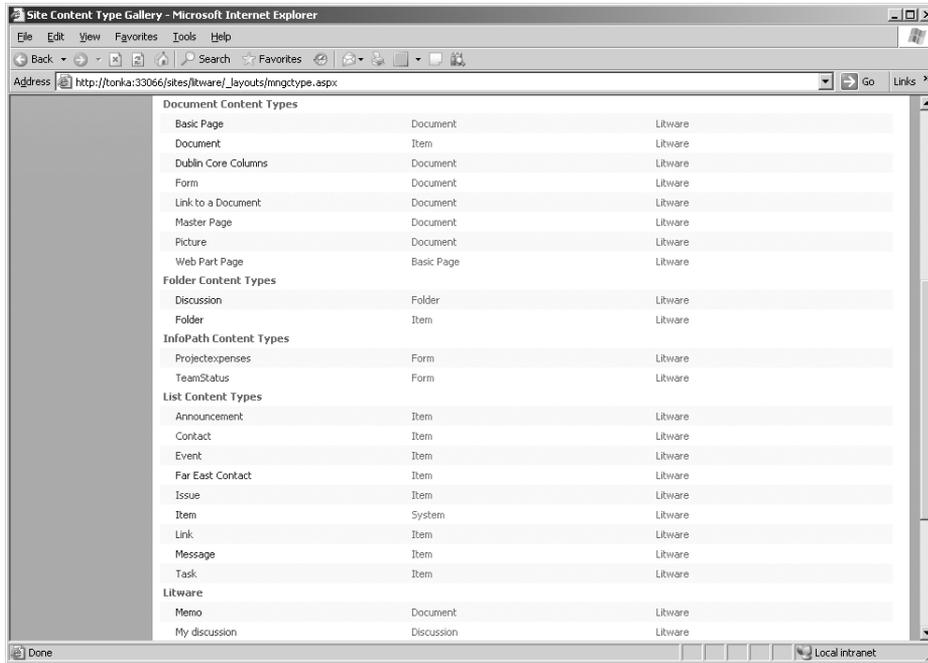


Figure 1-11 New InfoPath content types group in site content type gallery

Next, add the new form content type to one of the existing document libraries on the Fabrikam site by following these steps.

1. On the existing document library, go to the Document Library Settings page.
2. Under the Content Types section on the Customize Document library page, select Add From Existing Site Content Types.
3. On the Add Content Types For Document Library page, select InfoPath Content Types from the Select Site Content Types From drop-down list.
4. In the resultant Available Site Content Types selection box, select TeamStatus and click Add, as shown in Figure 1-12.

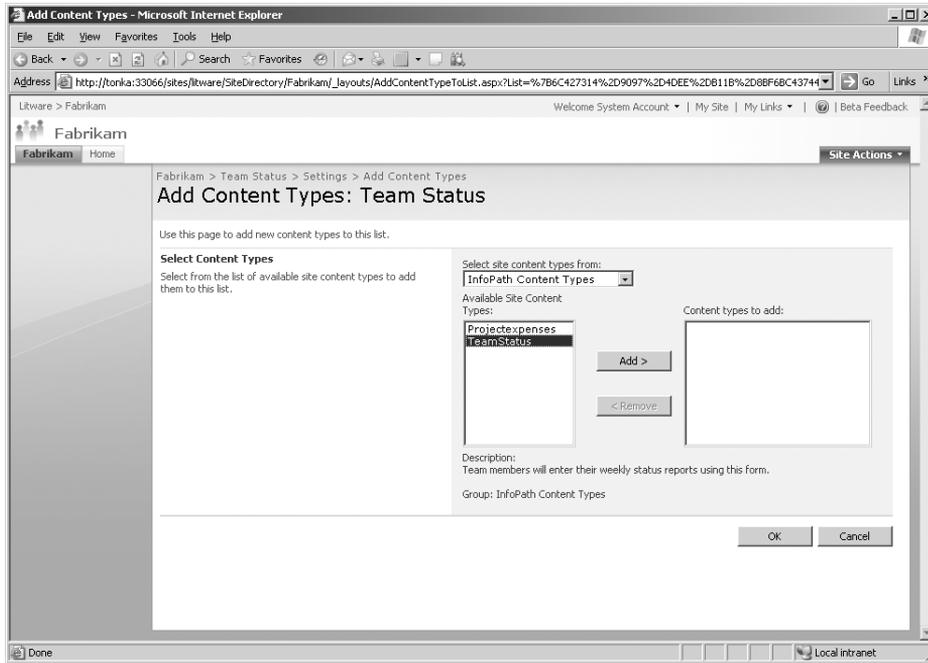


Figure 1-12 Add new InfoPath Content Type to Document Library

The content type has been added to an existing document library, which includes multiple content types, shown in Figure 1-13. You can now configure the InfoPath content type by adding additional columns or setting policies.

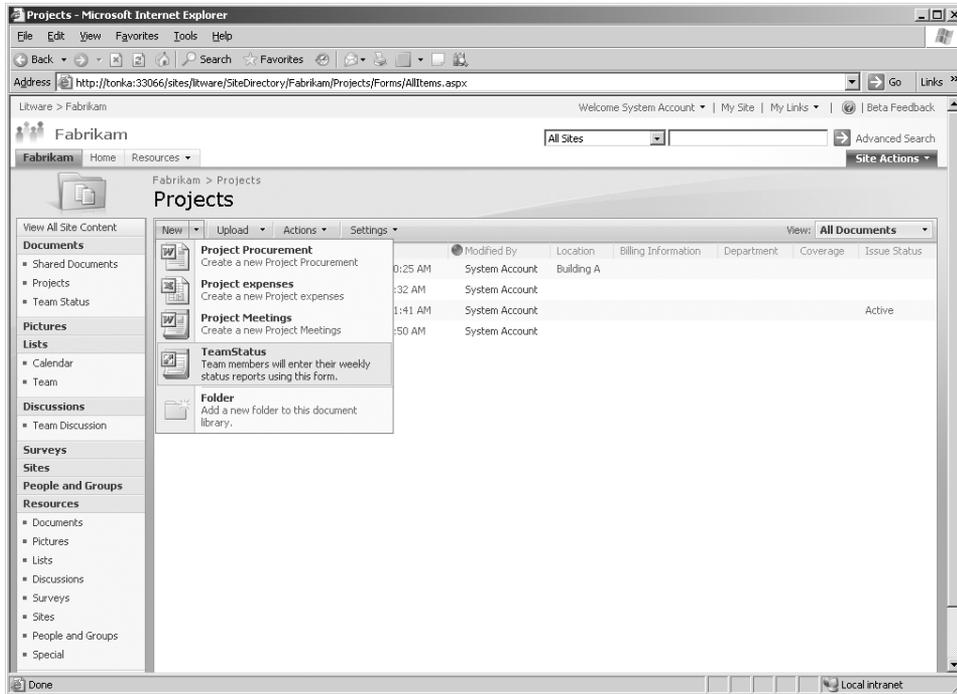


Figure 1-13 Addition of new InfoPath content type template