Microsoft®
InfoPath 2007
Quick Reference Card

InfoPath 2007 Screen

Title Bar

Help search box

Menu Bar

Standard toolbar

Tables toolbar

Formatting toolbar

Design Tasks task pane

Status Bar
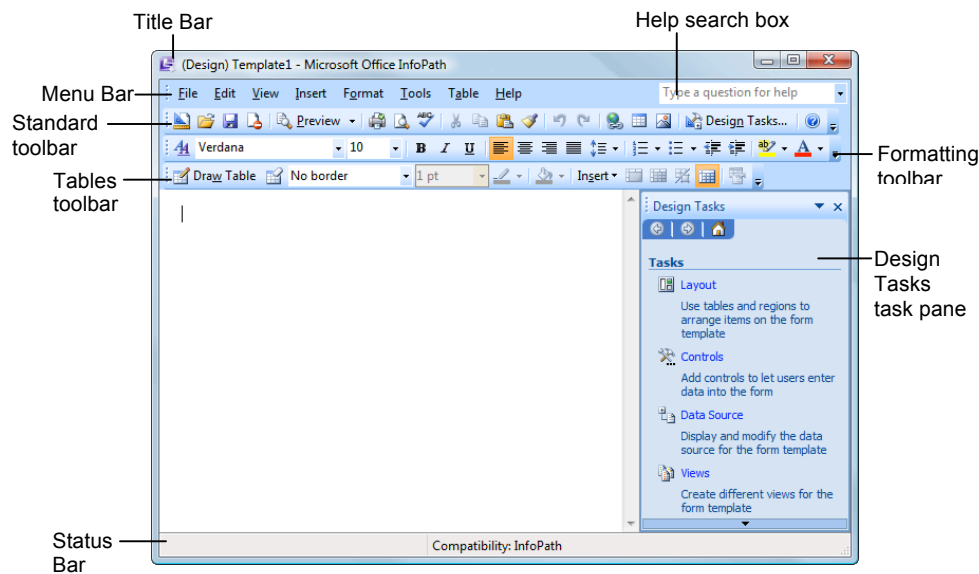
Keyboard Shortcuts

General

Design a Form Template	**<Ctrl> + <Shift> + <D>**
Open in Design Mode	**<Ctrl> + <O>**
Save	**<Ctrl> + <S>**
Fill Out a Form	**<Ctrl> + <Q>**
Help	**<F1>**
Create a Hyperlink	**<Ctrl> + <K>**
Task Pane	**<Ctrl> + <F1>**
Preview Form	**<Ctrl> + <Shift> + <B>**
Print Preview	**<Ctrl> + <F2>**
Print	**<Ctrl> + <P>**

Editing

Find	**<Ctrl> + <F>**
Replace	**<Ctrl> + <H>**
Spelling	**<F7>**
Zoom Out	**<Ctrl> + <Shift> + < * >**
Undo	**<Ctrl> + <Z>**
Redo	**<Ctrl> + <Y>**
Copy	**<Ctrl> + <C>**
Cut	**<Ctrl> + <X>**
Paste	**<Ctrl> + <V>**

Formatting

Bold	**<Ctrl> + <B>**
Italics	**<Ctrl> + <I>**
Underline	**<Ctrl> + <U>**
Select All	**<Ctrl> + <A>**
Font dialog box	**<Ctrl> + <D>**
Format Painter	**<Ctrl> + <Shift> + <C>**

Tables

Go to the next cell	**<Tab>**
Go to the previous cell	**<Shift> + <Tab>**
Add new row (Insertion point must be in the lower-right cell of the table)	**<Tab>**

The Fundamentals

The Standard Toolbar

Design Form

Save

Preview

Print

Spelling

Copy

Format Painter

Redo

Insert Hyperlink

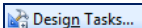Insert Picture

Design Tasks

Open

Permission

Print Preview

Cut

Paste

Undo

Insert Layout Table

Help
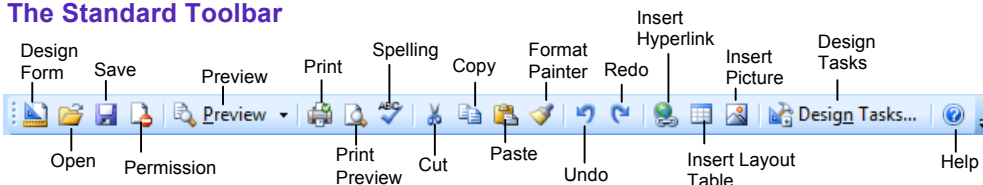
- **To Design a New Form Template:** Select **File → Design a Form Template** from the menu. Choose a template to base the form on and click **OK**.

- **To Open an Existing Form Template:** Select **File → Open in Design Mode** from the menu and browse to the form.

- **To Import a Form:** Select **File → Import Form** from the menu. Follow the steps in the Import Wizard to choose the Excel or Word form you want to import.

- **To Fill Out a Form:** Select **File → Fill Out a Form** from the menu. Click the **On My Computer** link. Browse to the form you want to fill out and click **Open**.

- **To Preview a Form:** Click **Preview** button on the Standard toolbar or select **File → Print Preview** from the menu. Or, press **<Ctrl> + <F2>**.

- **To Print a Form:** Click the **Print** button on the Standard toolbar. Or, select **File → Print** from the menu. Or, press **<Ctrl> + <P>**.

- **To Save a Form:** Click the **Save** button on the Standard toolbar, select **File → Save** from the menu, or press **<Ctrl> + <S>**.

- **To Publish a Form Template:** Select **File → Publish** from the menu, or click **Publish Form Template** in the Design Tasks task pane.

- **To Publish a Filled Out Form:** Click the **Save** button on the Standard toolbar, select **File → Save** from the menu, or press **<Ctrl> + <S>**.

- **To Check Spelling:** Select **Tools → Spelling → Spelling** from the menu, or click the **Spelling** button on the Standard toolbar, or press **<F7>**.

- **To Find:** Select **Edit → Find** from the menu, or press **<Ctrl> + <F>**.

- **To Find and Replace:** Select **Edit → Replace** from the menu, or press **<Ctrl> + <H>**.

- **To Insert a Hyperlink:** Select **Insert → Hyperlink** from the menu, or press **<Ctrl> + <K>**.

- **To Open the Font Dialog Box:** Select **Format → Font** or press **<Ctrl> + <D>**.

Design Tasks Task Pane

- The Design Tasks task pane is a guide through the steps for designing, checking, and publishing a form. The most basic objects, commands, and formatting properties you need to create a form template are available here.

- **To Open the Task Pane:** Select **View → Task Pane** from the menu, or click the **Design Tasks** button on the Standard toolbar, or press **<Ctrl> + <F1>**. The task pane is also open by default when InfoPath is launched.

Layout
The arrangement of elements in a form template is called the layout of the form. This is the first and most important step in designing a form. Use Layout tables and layout controls to arrange the form before beginning to insert other objects and controls.

Controls
Controls let users enter data into the form. Data that is entered into the controls is then added to the data source for the form template.

Data Source
The data source is what allows you to process and store data collected from forms. Data collected from the form is saved in the corresponding data source field. Databases and Web services are examples of data sources.

Views
Add views to the form template to provide additional ways for viewers to see the form.

Design Checker
Use this tool to make sure the form is compatible with the technology that will be used by users viewing and filling out the form.

Publish Form Template
When the form is complete and saved, it can be published so it is accessible. The form can be published four different ways: SharePoint server, Outlook e-mail, network location, or installable form template.

Design Elements

- **To Change the Page Background Color:** Select **Format → Background Color** from the menu. Change the page background settings in the Background section of the General tab.

- **To Change the Color Scheme:** Select **Format → Color Schemes** from the menu. Select the new color scheme you'd like to apply to the form.

- **To Format Font:** Use the commands on the Formatting toolbar to change the appearance of text in the form. Or, select **Format → Font** from the menu and make font formatting changes in the Font task pane.

- **To Add a Horizontal Line:** Select **Insert → Horizontal Line** from the menu.

- **To Add a Picture:** Select **Insert → Picture** from the menu. Select Clip Art or File to add a static picture to the form. Select **Control** so users can insert an image when they are filling out the form.

- **To Insert a Control:** Select **Insert → More Controls** from the menu. Or, select the control you'd like to insert in the form from the task pane.

- **To Change Control Properties:** Select the control and select **Format → [Control] Properties** from the menu. Or, right-click the control and select **[Control] Properties** from the contextual menu. Or, press **<Alt> + <Enter>**.

- **To Replace a Control:** Right-click the control and select **Change To** from the contextual menu and select a new control.

Working with Tables

The Tables Toolbar
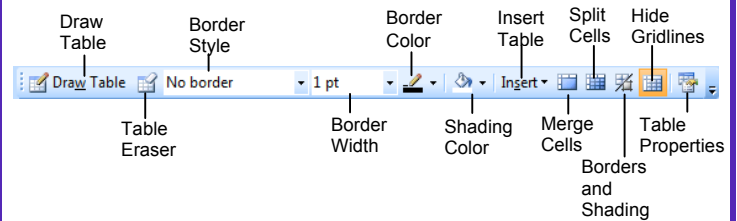
- There are two types of tables in InfoPath:
  Layout Table: The purpose of this table is to arrange and organize elements of the form. It makes the form easy to follow and understand.

  Data Table: The purpose of these tables is to provide more ways for users to enter data in a form. There are several types of data tables:

  Repeating Table: Users can add rows to the bottom of the table while filling out the form.

  Horizontal Repeating Table: Users can add columns to the right of the table while filling out the form.

  Master/Detail: Two tables in which an item is identified in the master table, and details about it are listed in the detail table.

- **To Insert a Layout Table:** Select **Insert → Layout Table** from the menu. Or, click the **Insert Layout Table** button on the Standard toolbar.

- **To Insert a Data Table:** Select **Insert → Repeating Table** from the menu. Or, select the control from the Repeating and optional section of the Controls task pane.

- **To Change Table Alignment:** Select **Table → Table Properties** from the menu. Or, right-click the table and select **Table Properties** from the contextual menu. Click the **Table** tab and choose the table alignment.

- **To Change Column Width:** Select **Table → Table Properties** from the menu. Or, right-click the table and select **Table Properties** from the contextual menu. Click the **Column** tab and set the column width.

- **To Change Cell Padding (space between boundary of cell and its contents):** Select **Table → Table Properties** from the menu. Or, right-click the table and select **Table Properties** from the contextual menu. Click the **Cell** tab and make changes in the Cell padding section.

- **To Change Table Border:** Select **Table → Borders and Shading** from the menu. Or, right-click the table and select **Borders and Shading** from the contextual menu. Click the **Borders** tab and select the type of border you want to use in the table.

- **To Change Shading:** Select **Table → Borders and Shading** from the menu. Or, right-click the table and select **Borders and Shading** from the contextual menu. Click the **Shading** tab and select a shading color.

- **To Adjust Column Width or Row Height:** Drag the right border of the column, or drag the bottom border of the row. Right-click the border to AutoFit the column or row according to its contents.

- **To Delete a Column or Row:** Select the column or row, click the **right mouse button** and select **Delete Columns** or **Delete Rows** from the shortcut menu, or select **Table → Delete → Columns** or **Rows** from the menu.

- **To Insert a Column or Row:** Select the column or row where you want the new column or row to be inserted. Click the **right mouse** button and select **Insert Columns** or **Insert Rows** from the shortcut menu, or select **Table → Insert → Columns** or **Rows** from the menu.

- **To Draw and Erase Table Borders:** Click the **Draw Table** button and click and drag the cursor to draw a border. Click the **Table Eraser** button and click and drag the cursor to erase a border.

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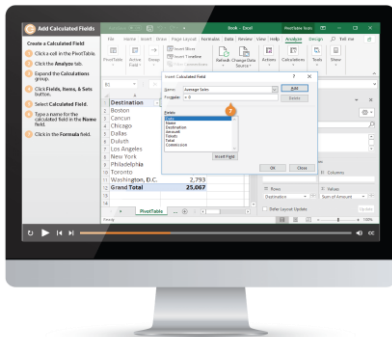
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