



# Create or edit a custom Document Information Panel for a content type

You can create or edit a custom Document Information Panel for use with a site or list content type.

1. Do one of the following:
  - For a site content type:
    1. On the home page for a site collection, on the **Site Actions** menu , point to **Site Settings**, and then click **Modify All Site Settings**.
    2. Under **Galleries**, click **Site content types**.
    3. Click the name of the site content type for which you want to create or edit a custom Document Information Panel.
    4. Under **Settings**, click **Document Information Panel settings**.
  - For a list content type:
    1. Open the the library that contains the instance of the list content type for which you want to create or edit a custom Document Information Panel.
    2. On the **Settings** menu , click the settings for the type of library that you are opening.

For example, in a document library, click **Document Library Settings**.
    3. Under **Content Types**, click the name of the content type for which you want to create or edit a custom Document Information Panel.


**NOTE** If the library is not set up to allow multiple content types, the **Content Types** section does not appear on the Customize page for the library.
    4. Under **Settings**, click **Document Information Panel settings**.
2. On the Document Information Panel Settings page, click **Create a new custom template** or **Edit this template**, depending on what you want to do.

Microsoft Office InfoPath 2007 launches, and displays the **Data Source Wizard**.

3. In Office InfoPath 2007, click **Finish** in the **Data Source Wizard** dialog box.

Office InfoPath 2007 loads the appropriate form template:

- If you are creating a new custom form, Office InfoPath 2007 loads an auto-generated document information panel, based on the content type schema.
  - If you are editing an existing custom form, Office InfoPath 2007 loads that form.
4. Edit the form as you want. Save the form when you are finished.  
  
**NOTE** Because the custom form is based on the content type schema, you cannot edit the form schema, as you can with typical Office InfoPath 2007 forms that are not based on an existing schema. To change the custom document information form schema, you must change the content type schema itself on the Microsoft Office SharePoint Server 2007 site.
  5. Publish the template. You can choose to publish the template directly to the content type, or to another location. Close Office InfoPath 2007 when you have published the form to the desired location.
  6. The Office SharePoint Server 2007 user interface should display the *Content Type: Creating Custom Template* page. Click **Go back to the Document Information Panel settings page**.
  7. Verify that **Use existing custom template (URL, UNC, or URN)** contains a path to the location of the form you just published, and then click **OK**. If you edit the form after you have published it, you can save the form back to the published location. You do not have to republish the form.

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