

Introduction to InfoPath Forms Services

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InfoPath Forms Services is a server technology built on Microsoft Windows SharePoint Services 3.0 as an ASP.NET version 2.0 application. It enables users to fill out Microsoft Office InfoPath 2007 forms by using a Web browser instead of, or in addition to, the Office InfoPath 2007 client program. This allows wider access to forms than was possible with previous versions of Microsoft Office InfoPath. In addition, InfoPath Forms Services provides a central location to store and manage form templates for your organization.

What do you want to do?

- [Enable wider access to form templates](#)
 - [Deploy and manage browser-compatible form templates](#)
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Enable wider access to form templates

A form template designer who uses Office InfoPath 2007 can choose to design a [browser-compatible form template](#). When that form template is deployed as a [browser-enabled form template](#) on a server running InfoPath Forms Services, users can fill out the form in a Web browser and do not need to have InfoPath installed on their computers. The user experience of filling out a form in a browser is similar to that of filling out a form in InfoPath. For example, features such as [data validation](#) are designed to work in the browser without requiring round-trips to the server. This means that the results that appear when certain conditions are present, such as data validation alerts, are immediately visible because the browser doesn't need to reload the form each time the user interacts with it.

Notes

- Some form controls contain options, called postback settings, which the form template designer uses to specify whether server round-trips are necessary to display data. These settings can add latency to the performance of a form. For example, a postback setting that requires data to be sent to the server can take extra time for the form to display the data, and if a postback is not necessary in a particular instance, can slow down the performance of a form without adding any benefit.
- Some features and controls, such as ActiveX controls, are not supported in browser-compatible

form templates.

Before deploying a browser-compatible form template to a server running InfoPath Forms Services, you should consider the following:

- How you deploy a browser-compatible form template depends on the features that the form template designer has added to it. See the table in the following section for additional details.
- In order for a form template to run as fully trusted when it is opened in InfoPath, the form template designer must add a [digital signature](#) to it. If a full-trust form is installed on a user's computer, that form template does not need to have a digital signature and can be filled out by using a browser or InfoPath.
- Browser-enabled form templates can be filled out by using some mobile devices if the form template is enabled to be displayed on a mobile device.

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Deploy and manage browser-compatible form templates

All browser-enabled form templates must be hosted on a server running InfoPath Forms Services. There are two deployment modes for form templates hosted on a server running InfoPath Forms Services: One for [user form templates](#) and one for [administrator-approved form templates](#).

User form templates can be deployed by anyone with permission to create libraries and lists. A user form template is a form template that contains only declarative functionality such as [conditional formatting](#), but does not contain managed code. User form templates run under the Domain security level.

Administrator-approved form templates are form templates that contain managed code, require full trust, use an administrator-managed data connection, are enabled to be displayed on a mobile device, or must be widely deployed across a site collection. A farm administrator generally performs the upload and verification steps in the deployment of an administrator-approved form template, although a form template designer can also perform the verification task from within InfoPath. Either a farm administrator with site collection administrator permission or a site collection administrator can perform the activation step. The process for deploying an administrator-approved form template requires the following three steps:

1. **Verify** The verification process shows information about the form template, such as errors and warnings. This is done by using a setting in Central Administration or by using the **Design Checker** task pane in Office InfoPath 2007.
2. **Upload** Once the form template is verified, it is uploaded by a farm administrator to the Manage Form Templates library for the Web farm.

3. **Activate** After the form template has been uploaded, it can be activated to a site collection by either a farm administrator or a site collection administrator.

Note A farm administrator must have site collection administrator permission on a site collection to activate a form template there.

The following table describes the two most common deployment scenarios and the role required for each.

Type	Scenario	Scope of deployment
User form template	An end-user with permission to create libraries and lists on a server running InfoPath Forms Services deploys a browser-compatible form template that contains declarative functionality such as conditional formatting.	The form template is published to a document library or as a content type . This deployment method is best for form templates that do not have managed code and that have a limited scope of deployment, such as those that are meant to be used by employees in a single department. Note If a user form template needs to be made widely available, it can be deployed using the same process that is used for an administrator-approved form template.
Administrator-approved form template	A farm administrator deploys a full-trust or domain-trust browser-compatible form template that contains managed code, uses a data connection that is managed by an administrator, is mobile-enabled, or must be	The form template is verified and uploaded by a farm administrator, and then it is activated to a form template library for one or more site collections. Activation is the process that is used to turn features on or off in a site collection, or to make administrator-approved form templates available for use. This deployment method works best for form templates that need to be widely deployed for use by employees in many departments

widely deployed across a site collection.

across an organization.

Note A farm administrator must verify and upload an administrator-approved form template, but a site collection administrator can activate the form template after it has been uploaded.

Notes

- If you want to deploy a form template that contains managed code, but do not have permission to do so, contact a farm administrator for assistance. Before you ask a farm administrator to deploy a form template, you must publish it to a location where the administrator can access it.
- When a farm administrator deploys a form template, it is added to a central location on the server. Anyone with site collection administrator permissions can activate the form template to their site collection. This method of deployment is recommended only for form templates that you want to make available to one or more site collections.

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