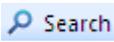
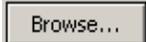
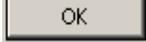
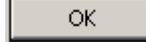


The screenshot shows the Microsoft InfoPath application window. The menu bar includes File, Edit, View, Insert, Format, Tools, Table, and Help. The toolbar contains various icons for file operations, editing, and design. The ribbon shows the 'Format' tab with options for font (Verdana, size 10), bold, italic, underline, and alignment. Below the ribbon, there are options for 'Draw Table' and 'No border' with a border width of 1 pt. On the right side, the 'Design Tasks' pane is visible, showing 'Layout' and 'Controls' tabs.

- 1) Help
  - a. Click  → Type key word → Click 
- 2) Importing a Microsoft Word form
  - a. Close document in Word
  - b. Open MS InfoPath → **File** → **Design a Form Template** →  → Double click **InfoPath importer for Word documents** →  → locate Word file and double click it →  (make changes if necessary) →  → 
- 3) Importing a Microsoft Excel form
  - a. Close document in Excel
  - b. Open MS InfoPath → **File** → **Design a Form Template** →  → Double click **InfoPath importer for Excel documents** →  → locate Word file and double click on it →  (make changes if necessary) →  → 
- 4) Creating a form in InfoPath from a sample
  - a. **File** → **Design a Form Template** →  → Double click on desired sample → Modify template as desired with Design Tasks on right
- 5) Creating a blank form
  - a. **File** → **Design a Form Template** → Under **Based on:** Double click **Blank** → 

- 6)  Design Tasks...
  - a.  **Layout** - draw and format tables
  - b.  **Controls**
    - i. Rich text box
      1. Insert formatted text, paragraph breaks, tables, photographs, or clip art
      2. Cannot publish to email forms that have them or sample forms that ever had them
    - ii. Drop-down list box- enable users to choose a single selection in a list of items
      1. Double click box →  → Type Value →  → Repeat for each desired item in list → 
    - iii. Combo Box – Users have option to type or select from a drop down list
    - iv. Repeating table
    - v. Check box
    - vi. Date picker
    - vii. All options below

 Text Box	 Optional Section	 Hyperlink
 Rich Text Box	 Repeating Section	 Expression Box
 Drop-Down List Box	 Repeating Table	 Vertical Label
 Combo Box	 Horizontal Repeating Table	 Scrolling Region
 List Box	 Master/Detail	 Horizontal Region
 Date Picker	 Bulleted List	 Choice Group
 Check Box	 Numbered List	 Repeating Choice Group
 Option Button	 Plain List	 Choice Section
 Button	 Multiple-Selection List Box	 Repeating Recursive Sec.
 Section		

9) Allow users to use digital signatures on specific sections within the form

a. In Design Mode, click **Tools** → **Form Options** → **Digital Signatures** (in column on left) → Check the button for **Enable digital signatures for specific data in the form** →

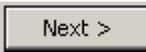
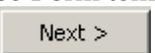
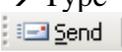
 → Type a name for the data →  → Double click on appropriate data field →  → Repeat for additional fields

b. Signature information must be included within a “section” → (If it is not, in Design mode click  **Controls** →  **Section** → Copy and paste existing signature box or create a new one by clicking  **Text Box** )

i. Right click on each section requiring a separate signature → **Section Properties** → **Digital Signatures** tab → Check the box for **Allow users to digitally sign this section** → Select appropriate field from drop down arrow list added in the step above (or click **Add data that can be signed** if it is not in the list → 

10) Email forms through Microsoft Outlook

a. Attach form to email and send or  
b. In Design mode, save form → **File** → **Publish** → 

Type Form template name →  →  →  → Type email address(es) to send to → 

11) Reply and submit forms

a. If received as an attachment (option a above): Double click attachment, fill out form, save, attach form to an email and send  
b. If received as a published document: Double click email containing form (must have Outlook 2007 installed to be able to complete form within email, otherwise it will be an attachment) → Complete form → 

→ Type email address if necessary → 

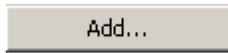
c. The person who receives the submitted form may receive a message that the signature could not be verified. They should click

 → Add...

12) Digitally sign a section within a form that has been sent to you

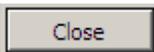
a. Type/modify information within the section → Click  **Click here to sign this section** → Type your name by the X → Type reason for signing → 

or  
b. Click  in upper right →

 → Select the part of the form →  → Type name by the X → Type reason → 

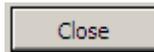
13) If a certificate or signature is not trusted

a. Click signature →

[Click here to trust this user's identity.](#) → 

14) If upon opening the form **One or more signatures in this form could not be verified**

a.  →  →

[Click here to trust this user's identity.](#) → 

## Keyboard Shortcuts

Standard Microsoft Office shortcuts apply (i.e. Copy: **Ctrl + C**; Paste: **Ctrl + V**)

Insert a control: **ALT + I, C**; Display the Design Tasks task pane: **Alt + N**