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**State of California**  
**Department of Technology**  
**Project Approval Lifecycle**

**InfoPath® Instructions**

**Statewide Information Management Manual – Section 19**

**July 2015**

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# Helpful Tips for Microsoft (MS) InfoPath Form Users

Microsoft InfoPath is a component of the Microsoft Office Suite. InfoPath must be available and enabled on end user systems. Please contact your desktop support team to provide assistance if you are unable to open the InfoPath form.

Unlike other file types in MS Office, InfoPath forms are derived from a source template. In this case, all form templates are derived from California Department of Technology (Department of Technology), available from a link on the Department of Technology website, as follows:

- From Statewide Information Management Manual (SIMM) Section 19 – Project Approval Lifecycle, select the applicable SIMM Section and template, as follows:
  - 19A - A.2 Stage 1 Business Analysis Template
  - 19B – B.2 Stage 2 Alternatives Analysis Template
  - 19C – C.2 Stage 3 Solution Development Template – *Under Construction*
  - 19D – D.2 Stage 4 Project Readiness and Approval Template – *Under Construction*

Keep the existing template name and save it in a location accessible to all that will be using the file, e.g. a common network drive. Please do not create an alternative template with a different name. This may cause subsequent reviewers and approvers to not be able to view the form.

- It is advisable that users create and use a shortcut to each respective template. This ensures that only blank Filler Forms are opened and used to create new proposals.
- All users of the form (whether an author, reviewer, approver, or someone sending completed forms to the Department of Technology) need to have opened the template file at least once. Access to the template can be done from our website, or a copy of the template can be sent along with the files in an email. If a new recipient receives a group of files, they will need to open the template at least once before being able to successfully open any of the forms. Choosing “Save & Send; Send Using Email; and, Send Form & Template” in the menus will accomplish this. Detailed instructions are provided in the InfoPath Technical Instructions that follow.
- Be aware that “InfoPath Editor Security Notice” commonly appears the first time the InfoPath® template is accessed. Generally, this will be a one-time notification due to the source template residing on a Department of Technology site.

The InfoPath form is in “.xml” format. Template files are “.xsn” format. Some organizations have restrictions on xml files. If this is encountered, you may want to talk to your desktop support unit. Xml files may be allowed by your organization when bundled in a zipped file.

Please contact your [Information Technology Project Oversight Division, Oversight Manager](#), if internal help cannot address an issue with accessing or using the form(s).

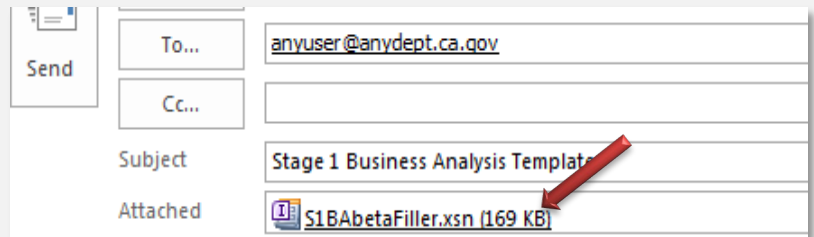
# InfoPath Form Technical Instructions

## Saving an InfoPath Form Template

The following instructions are for users who receive a form template as an email attachment. Note: The file extension for an InfoPath form template is “.xsn”.

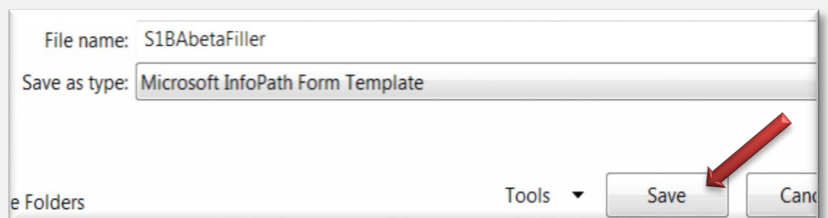
### Save the Template:

1. From the SIMM 19A.2 Template or from an email with the attachment, **right click** on the .xsn template and select **Save As** in the dropdown menu.



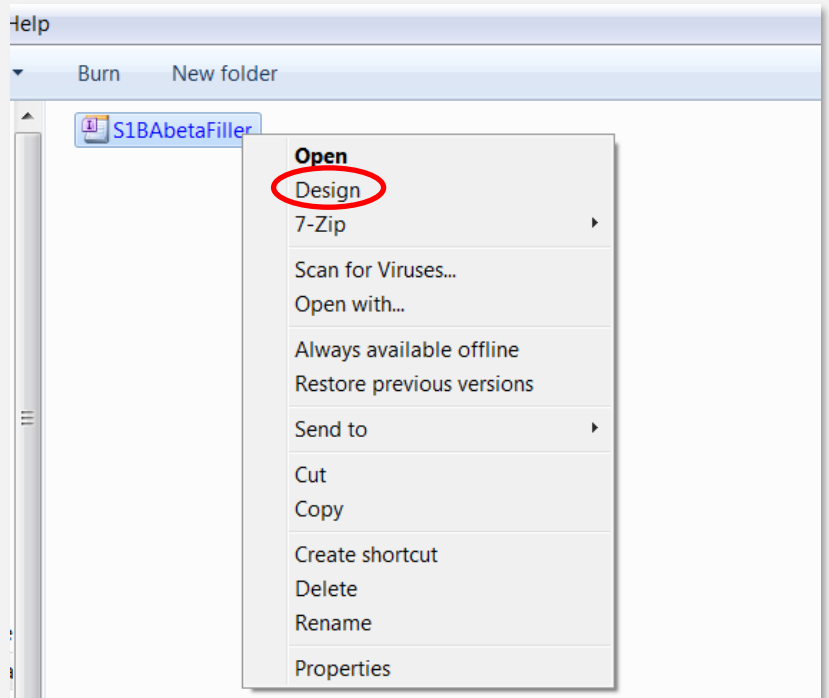
Note: The “Save as type” will indicate “Microsoft InfoPath Form Template”.

2. **Navigate** to the directory location on your computer where the template is to be saved and click **Save**.

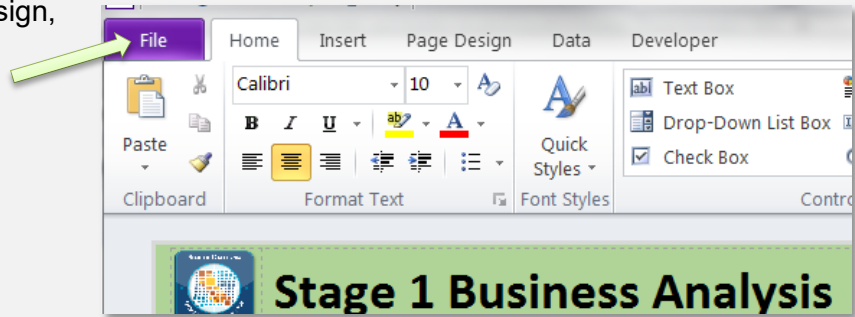


Once **Save** is selected, the **Save Attachment** menu automatically closes.

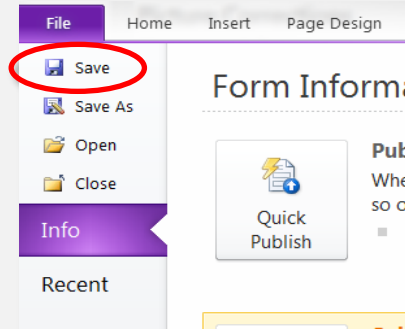
3. **Navigate** back to the location where the file was saved. **Right click** on the file, select **Design**.



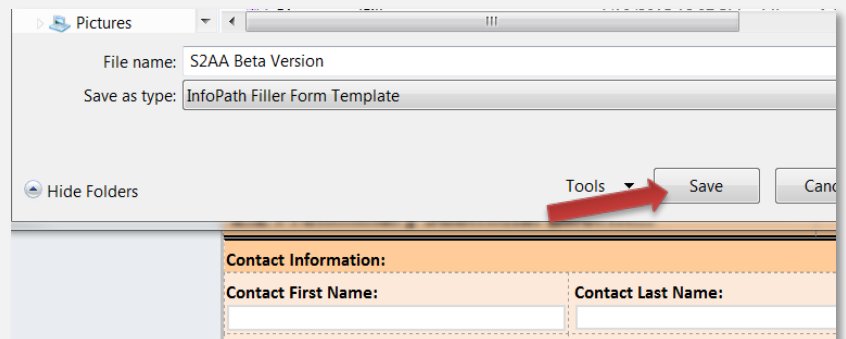
4. With the InfoPath file open in Design,



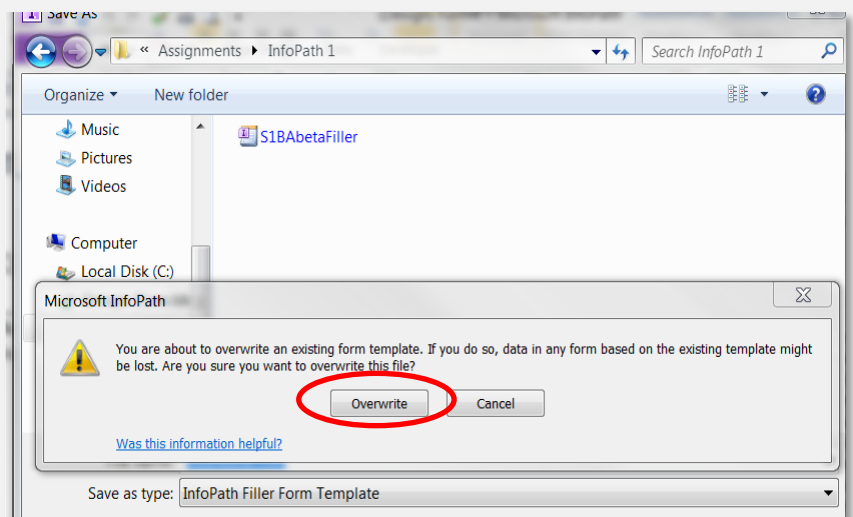
5. Select **Save** in the File Menu.



6. Select **Save**.

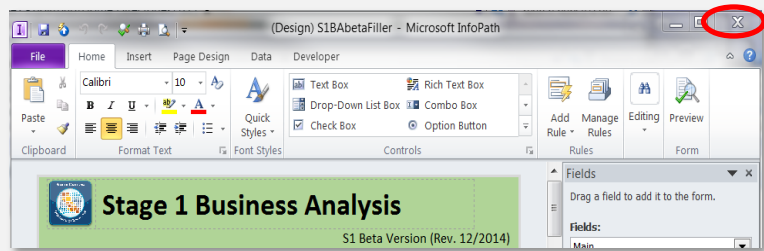


7. A message pop-up will ask if you want to overwrite the form template, select **Overwrite**.



8. Once saved, **exit** out of the (Design) (*template name*) – Microsoft InfoPath.

Opening and saving a copy of the form template caches the template on your local machine. This is a one-time process, which will not need to be repeated. Opening the form template in “Design” is no longer necessary.



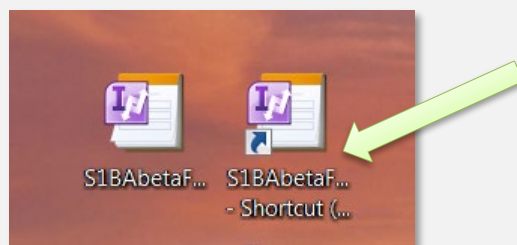
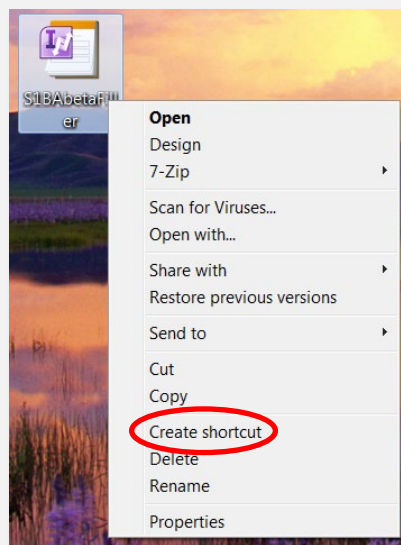
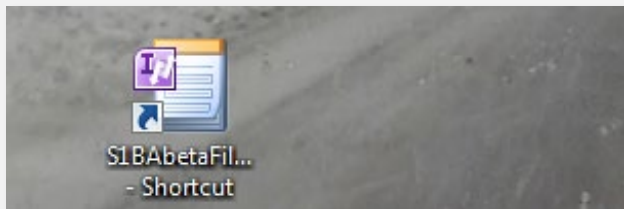
## Create a Shortcut for Form Completion

**Best Practice:** Create a Shortcut – Provides ease of use and acts as a template to create blank forms!

Now that you have saved the InfoPath form, as a best practice, create a shortcut to the template. The shortcut will only open blank forms ready to use, never the form design template.

### Create a Shortcut:

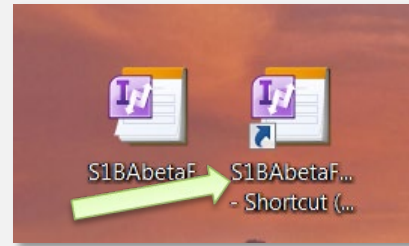
1. Navigate back to the location where the form is saved and **right click** on the file.
2. On the menu, select **Create shortcut**.
3. Now the InfoPath Form Shortcut can be used to open blank forms.



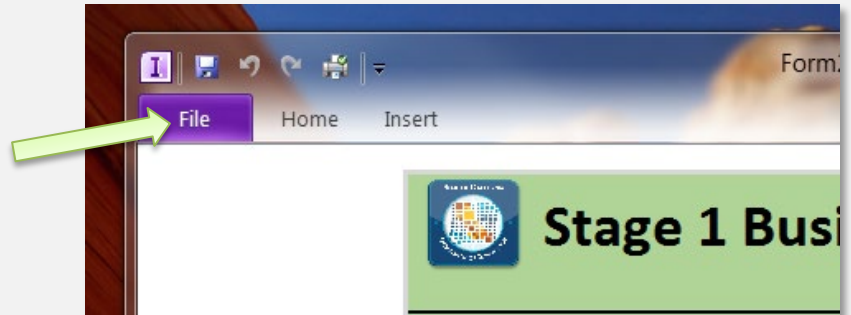
## Saving and Naming Forms

### Save and Name a Form:

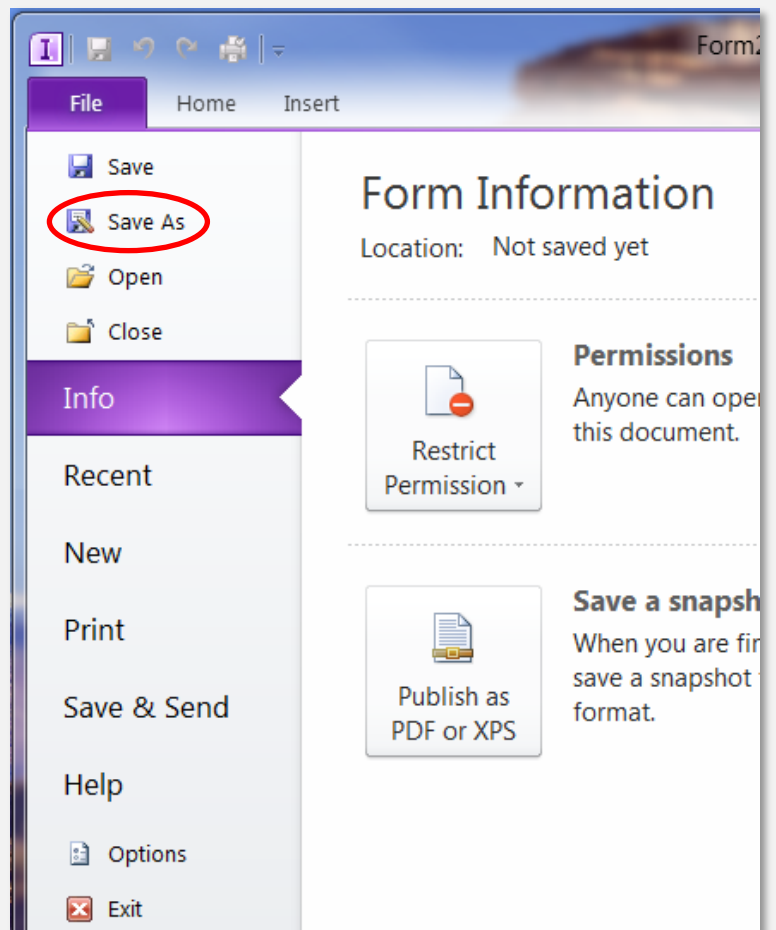
1. Navigate to the InfoPath Form Shortcut and open (double-click) a blank form.



2. Select the **File** tab.

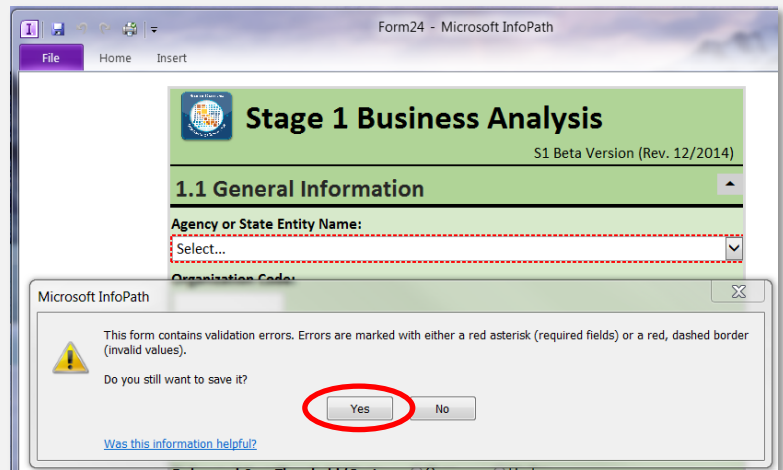


3. In the File Menu, select **Save As**.

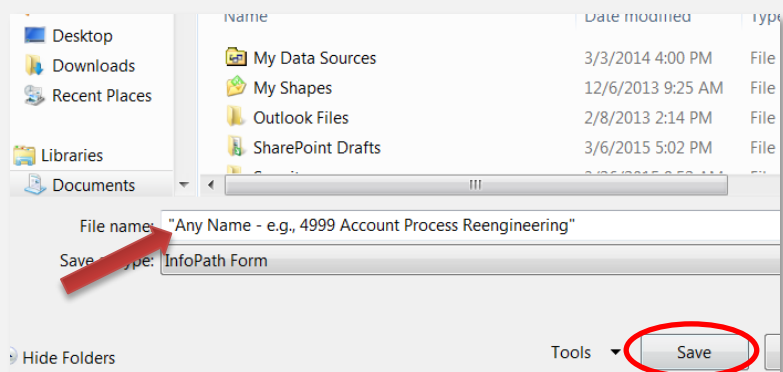




4. Once **Save As** is selected, a message pop-up may appear that indicates the form contains validation errors. Select **Yes** to save the form.



5. **Navigate** to the location where the working form will be stored.
6. **Enter** a unique filename. A recommended format is "Org Code Shortname" (e.g., 4999 Account Process Reengineering).
7. Select **Save**.



Your form is now ready to be completed and can be saved as normal.

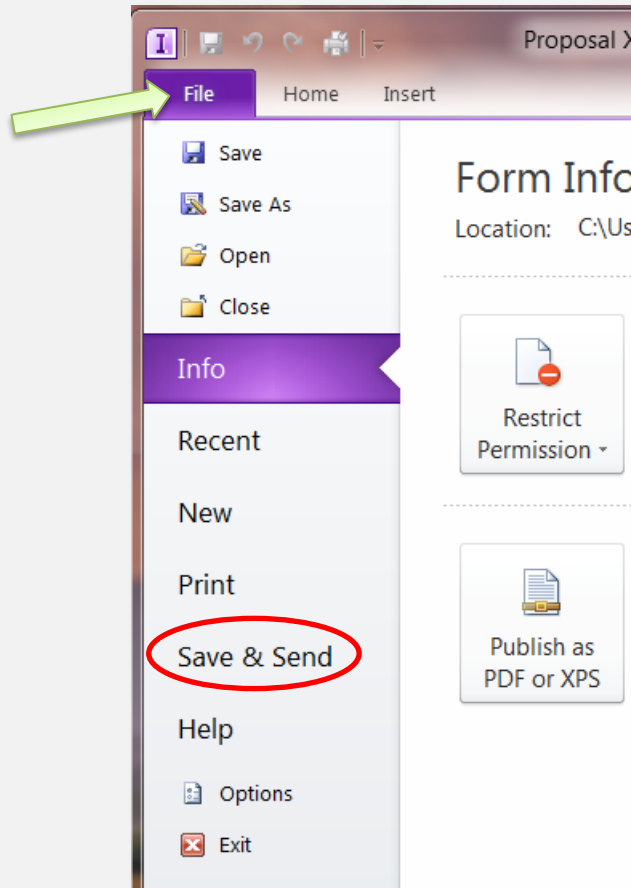
## Sending Completed Forms

Preferred Method to Send Completed Forms.

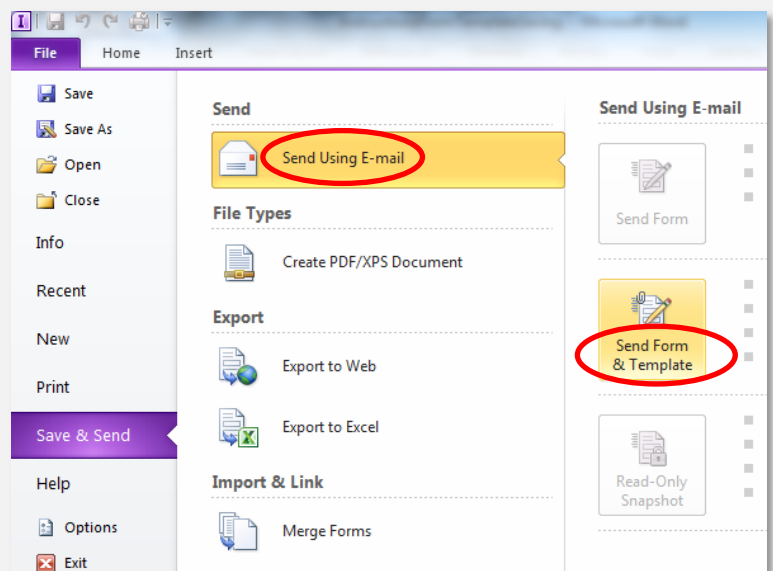
(Note: Microsoft® Office 2013 Users Refer to Instructions on Next Page).

### Sending a single form via email:

1. Open the form to be sent.
2. Select the **File** tab.
3. Select **Save & Send**



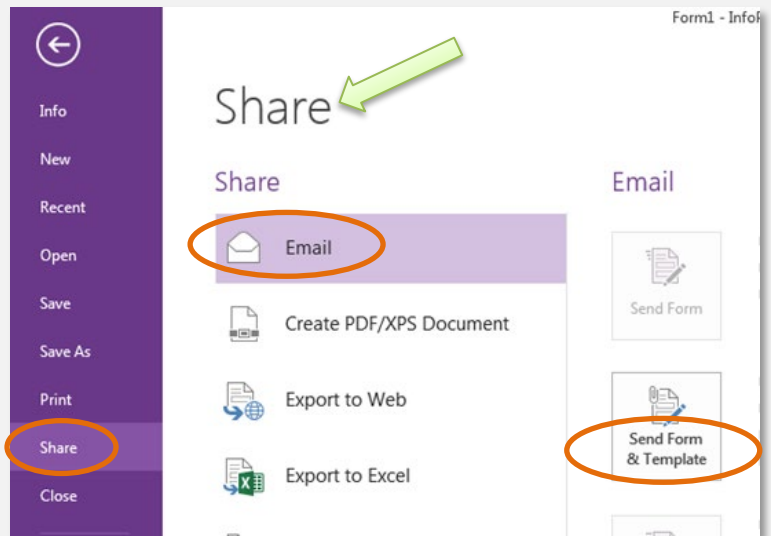
4. Click **Send Using E-mail**.
5. Click **Send Form & Template**.



The menu command **Save & Send** has been replaced with **Share**. Additionally, the **Send** menu heading has changed to **Share**. Within the **Share** menu, the command **Send Using E-mail** is now **Email**.

MS Office 2013 Users:

1. Open the form to be sent.
2. Select the **File** tab.
3. Select **Share**.
4. Click **Email**.
5. Click **Send Form & Template**.



#### *Sending a single form via email (Continued) - ALL USERS:*

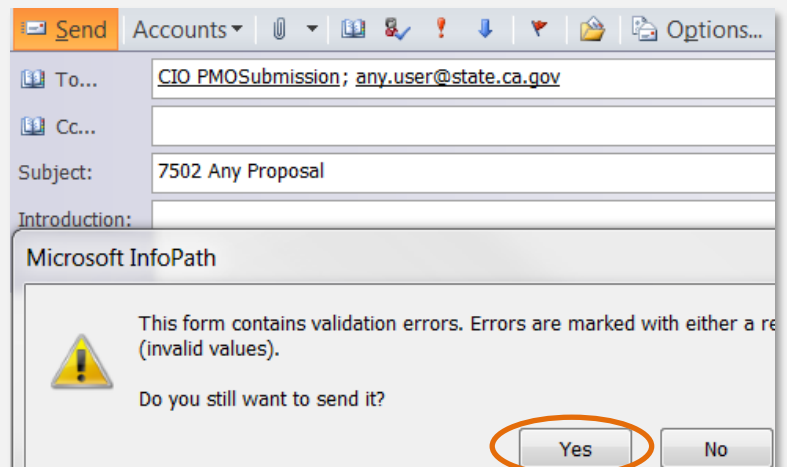
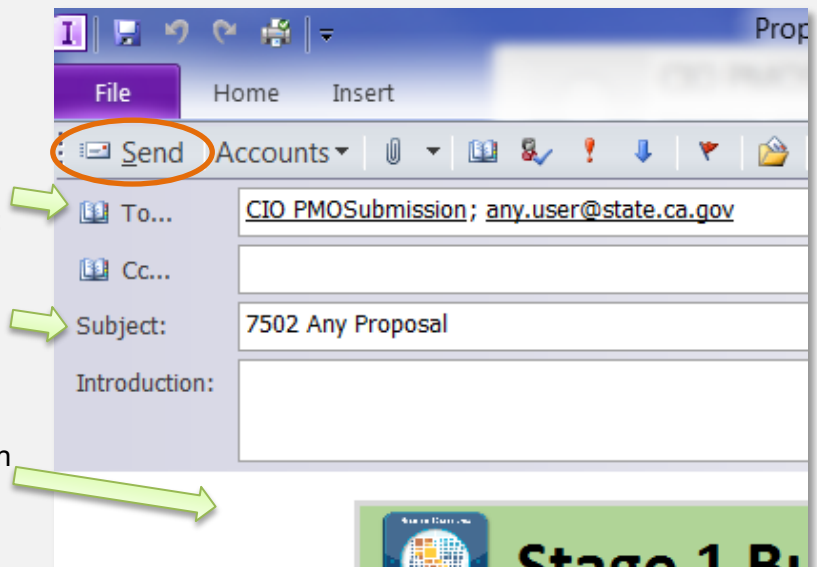
After Step 5, InfoPath will open an email header with the typical fields a user would see in Outlook.

6. Enter the **email recipient(s)** and add the **subject**, as appropriate. Proposals (and applicable attachments) are to be sent to:

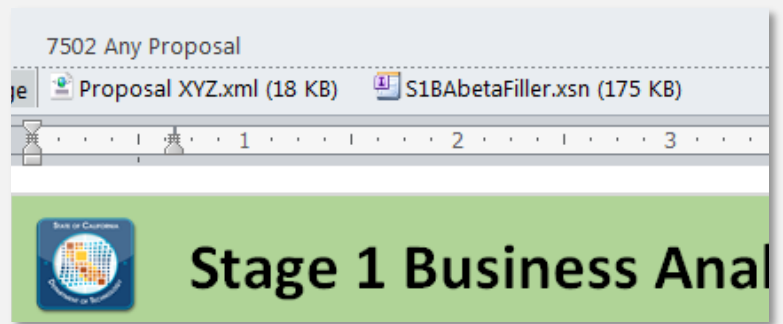
[CIOPMOSubmission@state.ca.gov](mailto:CIOPMOSubmission@state.ca.gov)

(Note: A snapshot of the form will show in the email body. This is not a working version of the form.)


7. Click **Send**
8. If a message pop-up appears that the form contains validation errors, review to ensure all required fields have been completed. Click **Yes** to send.



Note: This action sends the current form (.xml) and the form template (.xsn) as shown.



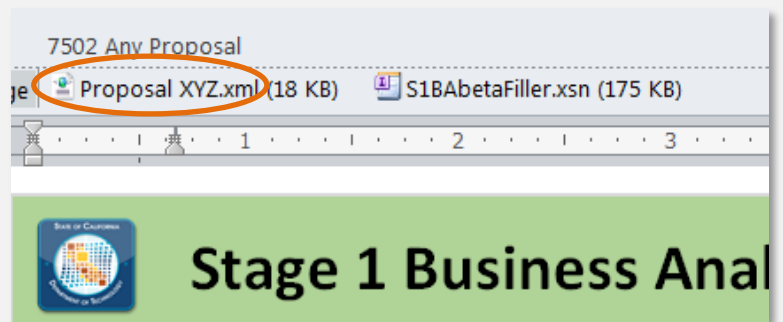
#### Sending multiple forms via email:

9. Follow steps 1 through 8 above.
10. Select “

## Email Recipient: Save Form(s)

1. The email recipient will need to right-click on the .xml form(s), navigate to the directory location where the file(s) are to be saved, and click **Save**.

Note: Repeat this step for each form in the email.

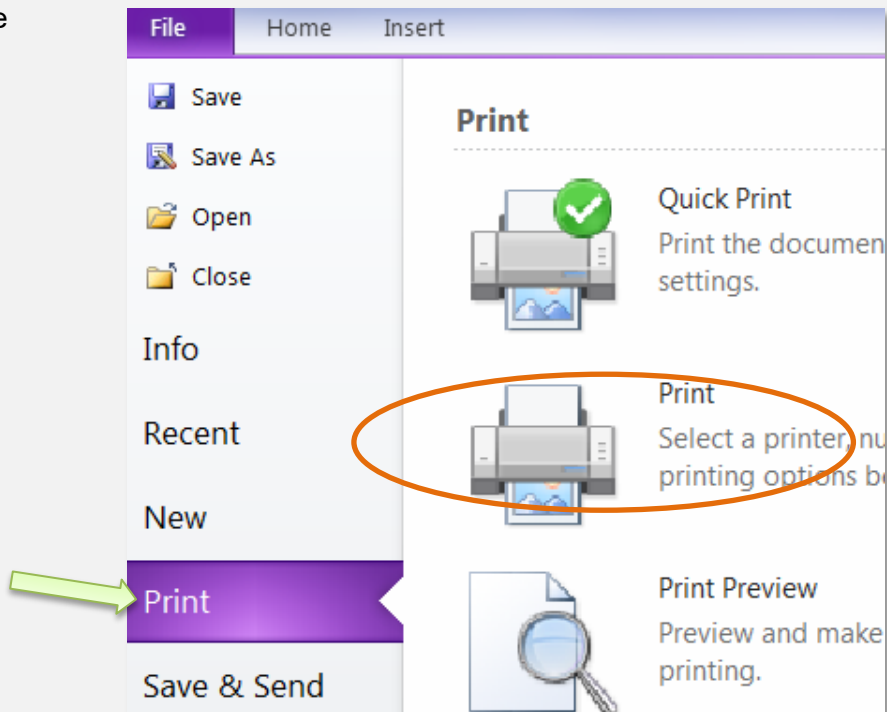


## Create a PDF Form Save and Print Version

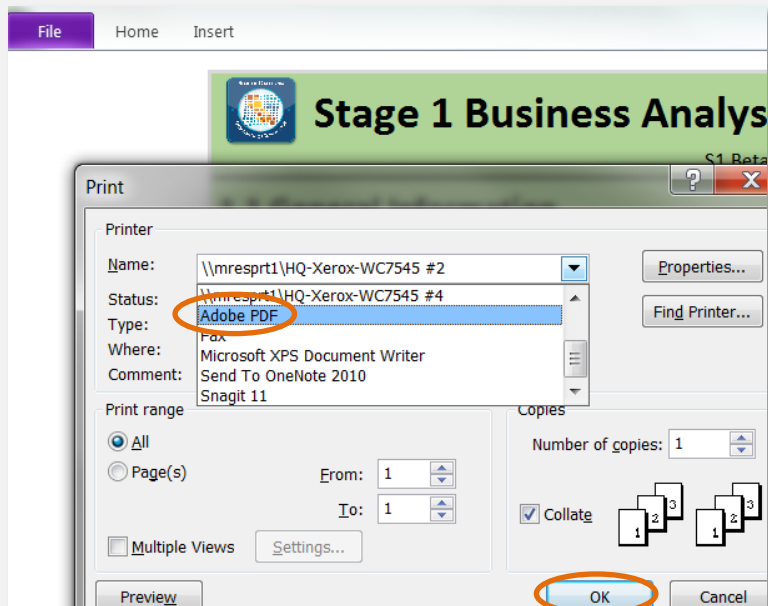
### Print completed form in PDF format

Open the form to print and from the File Menu:

1. Select **Print**.
2. Click **Print**.

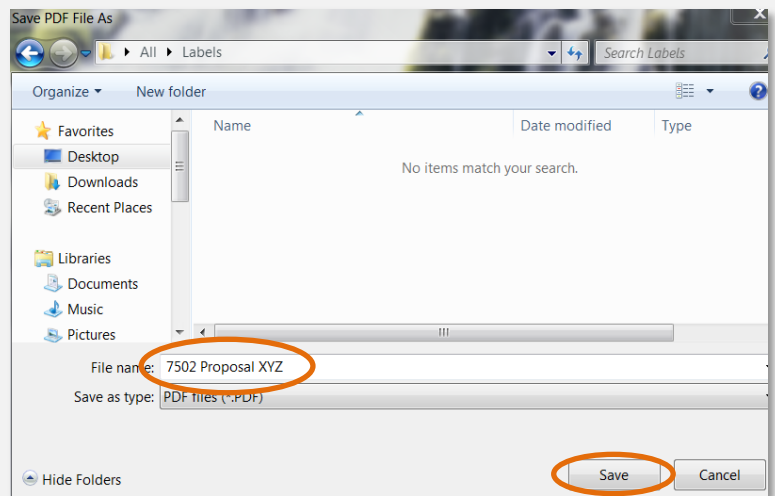


3. Select **Adobe PDF** on the Printer Name dropdown menu.
4. Click **OK**.



5. Name the PDF document a unique filename. A recommended format is the “Org Code Shortname” used for the InfoPath version.

6. Select **Save**.



7. A PDF file will automatically open. Click the **Print** icon.

