



# InfoPath Forms Compatibility Overview

**Summary:** This white paper shows an overview of the different controls and features in InfoPath and where they can be used. The document will cover InfoPath 2003, InfoPath 2007 and InfoPath Form Services (desktop and mobile devices)

The audiences of the white paper are Business Analysts, developers and decision makers.

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Applies to: Microsoft InfoPath 2003, Microsoft InfoPath 2007, InfoPath Form Services

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## ***Introduction***

Experienced developers who worked on Microsoft InfoPath form 2007/2003 solutions and want to offer the same form through a browser or a browser capable mobile device often run into compatibility issues.

This whitepaper gives an overview of all features in the different InfoPath Versions

## ***How to use this document***

Most of the information will be showed in a table and using symbols.

-  Full support
-  Partial support
-  No support

## Support for Controls

Control	InfoPath 2003	InfoPath 2007	Desktop Browser	Mobile Device Browser
Textbox	●	●	●	●
Check box	●	●	●	●
Button	●	●	●	●
Expression box	●	●	●	●
List box	●	●	●	●
Drop-down list box	●	●	●	●
Combo box	○	●	○	○
Hyperlink	●	●	●	●
Rich Text box <sup>(1)</sup>	●	●	◐	○
Date picker <sup>(2)</sup>	●	●	◐	◐
Option button	●	●	●	○
Section	●	●	●	●
Optional Section	●	●	●	●
Repeating Section	●	●	●	●
Repeating Table	●	●	●	○
Horizontal Repeating Table	●	●	○	○
Master / Detail	●	●	○	○
Bulleted list	●	●	○	○
Numbered list	●	●	○	○
Plain list	●	●	○	○
Multiple selection list box	○	●	○	○
File attachment	●	●	●	○
Picture	●	●	○	○
Ink Picture	●	●	○	○
Vertical label	●	●	○	○
Scrolling region	●	●	○	○
Horizontal region	●	●	○	○
Choice group	●	●	○	○
Repeating choice group	●	●	○	○
Choice section	●	●	○	○
Repeating recursive section	●	●	○	○

### Note: (1)

You cannot enable embedded pictures or specify partial rich-text formatting options for rich text box controls in a browser-compatible form template. Also, the full range of rich text formatting options is available only in supported versions of Internet Explorer. It is possible for users to edit text in a rich text box in any supported browser, but formatting options are unavailable,

including changing the text color and applying character formatting.

**Note: (2)**

Although you can use date pickers in a browser-compatible form template, the calendar icon and pop-up calendar appear only in supported versions of Internet Explorer. In other browsers, the date picker appears as a text box, but the date formatting options are still supported.

Browser-compatible form templates do not support the display of the date and time in the same control.

## Support for business logic features

Business logic features are used to help prevent data-entry errors and to automate actions in the user's form

When you use InfoPath features like data validation, conditional formatting and rules, you can define conditions and actions that automatically perform tasks that are based on events, such as the opening or closing of a form, or on values that are entered into your form template.

	InfoPath 2003	InfoPath 2007	Desktop Browser	Mobile Device Browser
Formulas <sup>(3)</sup>				
Data validation				
Rules <sup>(17)</sup>				
Conditional formatting <sup>(4)</sup>				
User roles				
Alerts (dialog boxes) that display immediately after users enter invalid data in a control				

**Note: (3)**

In mobile device browsers, except `xdXDocument:get-Role`, `Position`, and `Last` functions  
In InfoPath 2003, Except `userName`, `addDays` and `addSeconds` function

**Note: (4)**

In mobile device browsers, some conditional formatting features are supported, such as hiding controls based on conditions that occur in the form. However, it isn't possible to use conditional formatting to alter the appearance of a control based on conditions in the form. For example, you can't use conditional formatting to change the color of text in a control.

**Note: (17)**

Alerts cannot be displayed automatically for forms that are viewed in a Web browser, but users

can still view the ScreenTip and optionally display the alert that contains additional information.

Rules to display a dialog box are not supported

## Support for security-related features

The following table shows the level to which specific InfoPath security features are supported.

	InfoPath 2003	InfoPath 2007	Desktop Browser	Mobile Device Browser
Domain security level	●	●	●	●
Full-trust security level	●	●	●	●
Restricted security level	●	●	○	○
Digital signatures <sup>(6)</sup>	●	●	◐	○
Form design protection	●	●	○	○
Ability to <b>Save, Print,</b> and other commands (For detailed information, see also support for form-filling features)	●	●	●	●
Information Right Management (IRM)	○	●	○	○

### Note: (6)

Digital signatures are not supported in browser-enabled form templates that are rendered in mobile device browsers.

In addition, in desktop browsers, it is not possible for users to digitally sign an entire form. However, you can design the form template so that users can digitally sign one or more sections in the form.

To do this, you must enable digital signatures for a section control.

Also, although users can view digital signatures for a form in any supported browser, they can digitally sign the form sections only in supported versions of Internet Explorer

## Support for data connections

### Receive data connections

	InfoPath 2003	InfoPath 2007	Desktop Browser	Mobile Device Browser
Query data from an Xml file	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Consume Web services	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Query data from a Microsoft Windows SharePoint Services list or library <sup>(7)</sup>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Query data from a Microsoft SQL Server database	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Query data from a Microsoft Office Access database	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Query data by using data connection files in a Data Connection Library	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

#### Note: (7)

Certain data connection options are not supported in InfoPath 2003, including the ability to receive filtered data from columns in a Microsoft Windows SharePoint Services library or list. Before you save or publish your form template in InfoPath 2003 format, open the Data Connection Wizard, select the data connection you want to modify, and then, on the page where you select a Windows SharePoint Services list or library, clear the Include data for the active form only check box.

## Submit data connections

	InfoPath 2003	InfoPath 2007	Desktop Browser	Mobile Device Browser
Submit data as an e-mail message <sup>(19)</sup>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Submit data to a SharePoint library <sup>(8)</sup>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Submit data to a Microsoft SQL Server database	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Submit data to a Microsoft Access database	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Submit data to a Web service <sup>(9)</sup>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Submit data to a Web application that accepts HTTP POST submissions	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Submit data by using data connection files in a Data Connection Library	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>

**Note: (8)**

Data can be submitted to a SharePoint library, but data cannot be submitted to a list.

**Note: (9)**

You cannot configure the submit data connection in a browser-compatible form template to allow users to submit change information along with their form data to a Web service that accepts a Microsoft ADO.NET DataSet. Change information consists of the modifications that a user makes to the data stored in a database. The database uses a Web service to connect users to the database. ADO.NET can use change information to determine how to update the data in the database.

**Note: (19)**

In browser-enabled forms, features that are related to integration with Microsoft Office Outlook 2007 are unavailable, such as the Send to Mail Recipient command.

## Support for form-filling features

The following table shows the level to which InfoPath features that are related to filling out forms are supported

	InfoPath 2003	InfoPath 2007	Desktop Browser	Mobile Device Browser
Submit feature	●	●	●	●
Save feature <sup>(10)</sup>	●	●	◐	○
Print feature	●	●	●	○
Merge data from multiple forms	●	●	○	○
Export data to Microsoft Office Excel	●	●	○	○
Export data to web	●	●	○	○
Ink support	●	●	○	○
Offline support	○	●	○	○
Find and replace text	●	●	●	●
Auto complete feature <sup>(11)</sup>		●	◐	○
Spelling checking	●	●	○	○
AutoSave, Auto Recover, or crash detection features	●	●	○	○
Custom task pane	●	●	○	○
Add-In menus	●	●	○	○
Filters	●	●	○	○
Placeholder text	●	●	○	○
Prompting users to save changes before closing their form	●	●	○	○
Undo and Redo	●	●	○	○

### Note: (10)

In a browser-enabled form, users can click the Save or Save As buttons to save their forms to a SharePoint library. However, they cannot save their forms to a location on their computers. In addition, users who view forms in a mobile device browser do not see the Save or Save As buttons.

### Note: (11)

In browsers other than Internet Explorer, the AutoComplete feature is unavailable, even if the Enable AutoComplete check box is selected for the control.

## Support for view-related features

The following table shows the level to which InfoPath view-related features are supported

	InfoPath 2003	InfoPath 2007	Desktop Browser	Mobile Device Browser
Multiple views	●	●	●	●
Read-Only views <sup>(12)</sup>	◐	●	●	◐
Protected Views <sup>(18)</sup>	●	●	○	○
Print views	●	●	●	○
Word print views <sup>(13)</sup>	●	●	○	○
Print multiple views at once <sup>(14)</sup>	○	●	○	○
Print page breaks, headers, or footers	●	●	○	○
Printing form data in headers and footers	○	●	○	○

### 📌 Note: (12)

In InfoPath 2003 you need to create an identical view and make every control read-only by selecting Read only in the Control Properties -> Display Tab-> Check Read only.

### 📌 Note: (13)

Microsoft Office Word print views are not supported in browser-enabled form templates. You can publish a form template to InfoPath Forms Services without removing the Word print view. However, when users print the form, the Web browser ignores the Word print view settings.

### 📌 Note: (14)

The Print Multiple Views functionality is not supported in browser-enabled form templates. You can publish a form template to InfoPath Forms Services without changing any options in the Print Multiple Views dialog box. However, when users print the form, the Web browser uses a read-only view of the current view for printing purposes rather than printing multiple views.

### 📌 Note: (18)

You can leave protected views enabled in your browser-compatible form template, the view will not appear in the browser.

## Support for programming features

	InfoPath 2003	InfoPath 2007	Desktop Browser	Mobile Device Browser
Managed code <sup>(15)</sup>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Scripting <sup>(16)</sup>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
COM Add-ins	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
XPath <sup>(17)</sup>	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
The Office InfoPath 2007 object model	<input type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>
Style Sheet Customizations (xd:Preserve)	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Caching data from a secondary data source	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Input Parameters	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>	<input checked="" type="radio"/>

### Note: (15)

In a browser-compatible form template, managed code must be based on the InfoPath managed code object model that is provided by the Microsoft.Office.InfoPath namespace. A subset of the members of the Microsoft.Office.InfoPath namespace provides features, such as Information Rights Management (IRM), that are not supported on the server..

In a browser-compatible form template, you cannot add code that runs when a user saves the form data.

The Merge using custom code feature is not supported in browser-enabled form templates

### Note: (16)

Any code that is written in VBScript, JScript, or the InfoPath 2003-compatible object model provided by members of the Microsoft.Office.Interop.InfoPath.SemiTrust namespace is not supported on the server.

### Note: (17)

The **xdEnvironment::IsMobile** and **xdEnvironment::IsBrowser** functions are not supported in InfoPath 2003. These functions often appear in XPath expressions and may occur as part of a or as part of a control's data validation or conditional formatting.

Before saving a form template in InfoPath 2003 format, you must remove the call to the unsupported function from the XPath expression.

## ***About the author***

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Frederik is a highly educated, technically and customer orientated ICT consultant with over 10 years of international experience in ICT and research work.

Most of his experience and skills are in InfoPath, BizTalk (linking with SharePoint and InfoPath), SOA Architecture.

Frederik has an excellent commercial and pro-active approach for problems solving, optimizing and leading teams. Frederik is proud to be able to significantly reduce time to deliver results, with respect to project planning, testing phase and documentation.

His InfoPath blog:

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## ***About SilverSands Associates***

SilverSands Associates is a group of consultants, who brought their knowledge, their skills and enthousiasme about Microsoft Products together

This merge made SilverSands Associates complete many challenging projects.

Website:

<http://www.SilverSandsAssociates.com>