Lay out an InfoPath 2010 form

While it is easy to design a basic form with text and controls to collect data, a small amount of extra effort can help you design good-looking forms that are aesthetically pleasing and clear for users to fill out. InfoPath forms are laid out using tables that help you control what users see when they fill out a form.

In this article

Choose a page layout

Each page consists of a page layout, included by default when you start designing a new form, and a number of tables within that page layout. You can use a different page layout from the default by inserting one of the pre-defined layouts available on the **Page Design** tab.
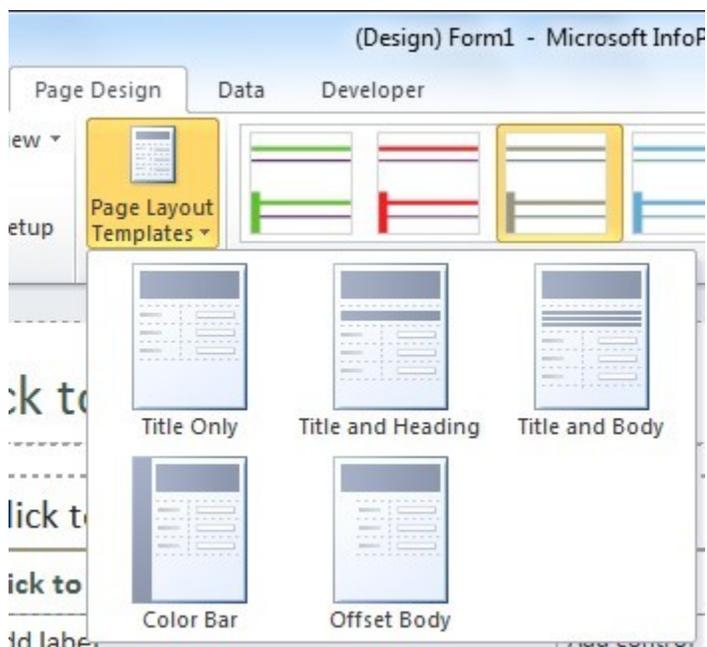
To apply a page layout, do the following:

1. Delete the existing layout container.

2. Click in a blank area of the page.

3. On the **Page Design** tab, in the **Page Layouts** group, click **Page Layout Templates**.

4. Click a page layout.

A basic page layout is applied to the form.

NOTE   You can set the layout of the entire page, and not only the contents inside the cell of a table, to be right, left, or center aligned.

To change the alignment, click outside the right edge of the table container. Next, on the **Home** tab, click **Left**   , **Right**   , or

Center   .

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Insert tables

After selecting a page layout, you must indicate the placement of labels and controls. Placement is accomplished with tables within the page layout. This keeps labels and controls organized and makes them appear horizontally and vertically aligned.

There are pre-built tables available that include themes and can be customized like standard tables. If you insert a custom table, then you must manually style it and cannot apply a theme.

Insert a pre-defined table style

1. Click in the body of the page layout.

2. On the **Insert** tab, in the **Tables** group, click on one of the pre-defined table styles.
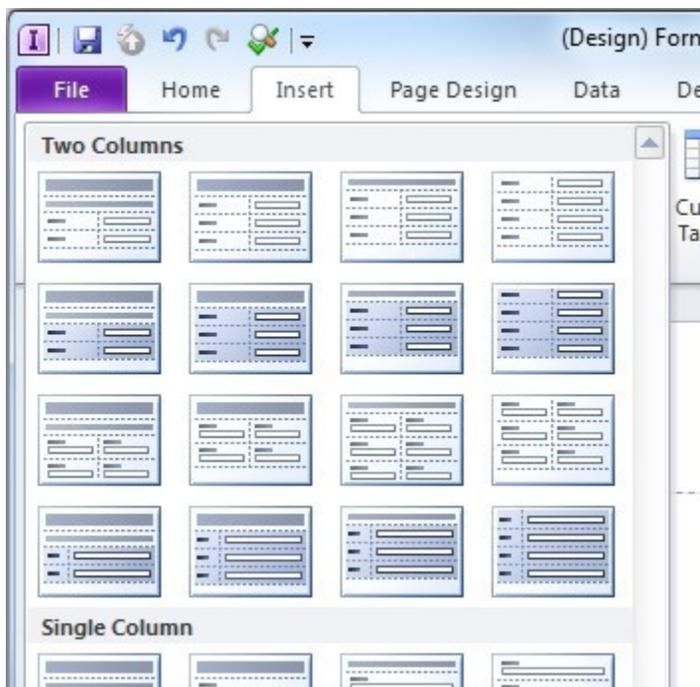
Insert a custom table

1. Click where you want to place the table in the form template.

2. On the **Insert** tab, in the **Tables** group, click **Custom Table**.

3. Do one of the following to insert a table:

    ▪   On the grid that appears, click to indicate the size of the table you want to insert, as illustrated by the highlighted squares as you move your mouse over the grid.

    ▪   Click **Layout Table** to indicate the size of the table to be inserted by manually entering the number of columns and rows, then click **OK**.

    ▪   Click **Draw Table** to manually draw a table, first indicating the overall size of the table then defining where the column and row dividers should go. When finished, click **Draw Table** to turn off the draw table feature.
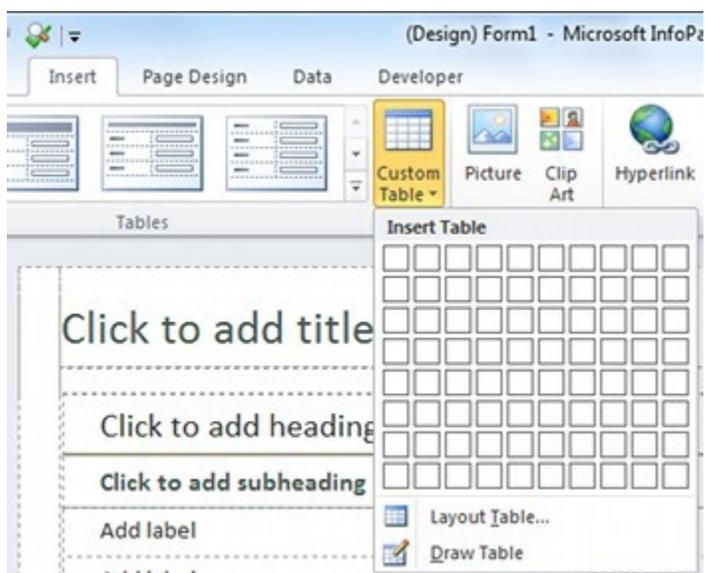
Tips for choosing a table layout

The following is a list of best practices when laying out a form in InfoPath 2010:

▪   Choose a table style with the necessary heading and subheading styles for the type of form that you want to create.

▪   Consider how users will access the form. If they use small screens then consider splitting the form across multiple views, as shown in Add, delete, and switch views (pages) in a form.

▪   To help ensure the most user-friendly experience for users filling out unfamiliar forms, use the default left-alignment of labels in two-column tables so that they are easy to read from top to bottom.

▪   Consider using a table with one column of data entry fields for forms that are used frequently as this can help decrease the time that it takes for a user to fill out the form.

▪   When vertical screen space is a constraint and the form is unfamiliar, use right-aligned labels. This allows for a strong association between label and control (like in the single column option), but allows you to save space by putting the label and control on the same line.

- Use appropriate layouts for the amount of data you expect the user to enter. For example, for a notes section, use a one-column design to allow as much space as possible for the user to enter content. Likewise, to allow a user to enter an address, consider using a table with several columns, but merging the cells on the first row. This allows you to have the street address field on one long row, while having the city, state, and ZIP Code/Postal Code fields on the same row below it.

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Apply a theme

Themes enable you to change the look and feel of the page layout and any pre-defined table styles that are used in your form template. Themes achieve this by adjusting borders and cells within your tables in addition to the font styles used on your text.

To apply a theme, on the **Page Design** tab, in the **Themes** group, select the desired theme. You can select from five theme categories — **SharePoint**, **Professional**, **Industrial**, **Playground**, and **Modern**. The different colors used by InfoPath themes match the theme colors available in SharePoint. As a result, it is easy to make your InfoPath form template match a themed site in SharePoint.
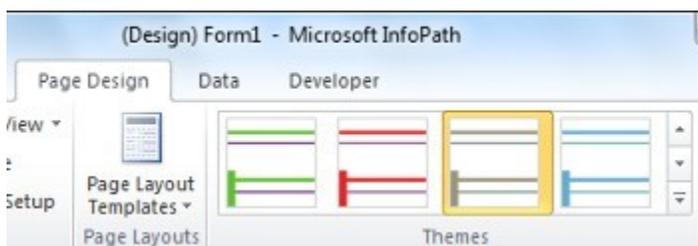
   IMPORTANT   Themes only affect pre-defined page layouts and table styles in addition to text that has not been manually formatted. As a result, it is a best practice to apply themes before applying custom formatting, changing the font (such as making it bold, italicized, or selecting another font entirely), or changing the background of table cells.

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After laying out the form template

After the form template has been laid out, continue by adding data connections, controls, views, and rules before publishing it.

- For an overview of the steps involved with this process, see Introduction to designing a form in InfoPath 2010.

- For information regarding the controls that you can add to your form template, as well as the procedures involved to do so, see Introduction to controls.

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