

Convert Excel Documents to InfoPath

In this demo, I am going to show how you can take an Excel file and convert that into an InfoPath form. The way I am going to do it is using the internal prebuilt converters that InfoPath provides us. So, let us look at a Excel file that I have, it is called the Resource Provisioning Form_simple. So it is a very simple type of file. It has a logo for the company. It has got the form parameters, so it has got the title for the form and asks for the person's Name, Date, Date of Hire, and to just select the Department that they belong to, the Equipment that they need, so we just click off the things that they need, and if there is Applications that they require to be on their laptop or desktop, they need to list them here, any additional Notes are listed here as well. So, there is no borders around anything, there is no check boxes, there is no controls at all in this thing, just a very very simple form and I just want to show you that when you try to convert this form into an InfoPath form, exactly what InfoPath does with it.

Now, you have to have the file closed before you can import it; otherwise, you can get an error if you try to import it without closing it. So, I am going to close it. Start up InfoPath → click on Import a form. I have two choices, that is the only two importers that come out of the box with InfoPath - Excel and Word, so I will just choose Excel → click Next → and click on Browse → click on the Resource Provisioning Form Simple → and Open → and Finish. So I just took the default parameters and tried to import that into InfoPath. It says that 'Import was successful'. Let us see how it looks.

Okay so what it did really was just brought in the text that I had in Excel directly into InfoPath and these dash lines that you are saying here, these dash lines are all invisible tables, table, rows, and columns. So, when you look at preview of this form, the table does not get rendered and just a form itself gets rendered. Now of course, this is not really a usable form at all. The text is all here, which is good, but of course you have to put in all the different text boxes and check boxes and everything else that you need. Also it did a word wrap because all this text was in one cell in Excel so it did a word wrap and it is showing these texts in a pretty ugly manner unfortunately.

Just look at the parameters that it uses to import a form. Click on File → Design a Form Template → click on Import again → Next. One thing I did not click on before was the Options button, I will go ahead and click on it now. And it shows me that by default you can just go ahead and convert it and it will take care of the way it want or you can define Custom Conversion in which you can tell it what to look for. So if you wanted, for example, a repeating table for, in our case for example, the application names that you are supposed to put into the form, it could detect a repeating table if you had borders around the rows in Excel. Also it can look for Formulas, it can look for Numeric Data, Cells referenced by Formulas, and also Empty Cells with Borders and it could make all these into text boxes, and that is about it really. You have a Repeating Tables that it can create for you and it can create Text Boxes based on these things. So I can probably put borders around different fields and have that be a Text Box, that is a start, so let me go to my form again, actually this time I am going to go to the Resource Provisioning Form.xlsx, not the simple one, and this form has the things like I just talked about. So, it has, first of all, if you look above, these fields have been merged, so all these cells have been merged into one cell because this is just a heading. Same thing with this one, the subheading I have merged all these cells into one, so I can see the subheading without getting a word wrapping going on. For Name, Date, Date of Hire, I have put in cells with borders around the cells, so you can evaluate them into text boxes when it gets imported. Also I attempted to put check boxes, so these are actual form field controls that I have put in there. I have put check boxes in the form. It looks and works really good in Excel. I did the same thing for equipment here. And down here for the Application Name, I made this into sort of a table, so I have given them two rows to put their application names in there and of course you can right click on this row here and click on Insert to insert more rows in Excel. So it is a pretty good workable form.

One last thing here you got the notes field and that is just one big field that I have put out there and also I encompassed this field with borders. So I want take all that stuff and try to import that in. Let us go ahead and close this form first, I don't think I made any changes, I will click on No. And I will go back to InfoPath, okay I already have the Import Wizard, so let us go ahead and use that. In Options, I am going to leave it to Custom Conversion, so it takes all these things into account.

And I will browse to my form, which happens to be right here →
Open → and Finish. And it successfully was imported. Great!

Okay so as you can see that it took these cells with the borders around them and it made them into text boxes and not just that, but it named them as well so this one is called Name, which is coming from this field right here. This one is called Date and this one is called Date of Hire, and as you can see the naming scheme in InfoPath does not give the option of having spaces in between the words so it uses a Pascal notation and capitalizing each letter of each word but putting all the words together. Down below unfortunately, it did not take the check boxes into account as well, so it just ignored the check boxes altogether. And for the Application Name, it made that into a Repeating Table, which is good, which is exactly what I wanted. Now for the Notes field, it made that into a big text box, which is good as well. If I look at this in a Preview mode, it looks cleaner this way because all the dotted lines, the invisible tables lines, which are not showing up here. So this is what my form looks like. Now I could have merged the cells to make the Application Name, in Excel I could have merged the cells, so it would not give me the Repeating Table, which looks as wide. So I could have done this one better in my Excel sheet before importing it. Notes, like I said before, this shows up as a text field. So, what happens is that your kind of stuck with this solution with the out of the box importers. You use this importer to get 80% of the way to your solution and the other 20% you have to do yourself, and that 20% ends up taking 80% of the time to do while this 80% of work, which was just importing the file, it happens in 20% of the time. So, keep in mind that with any form imports, you would have to do some work afterwards and plan for that, but at least this gets you somewhat closer to your solution.