



# INFOPATH DETAILING SERVICE

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## BEST PRACTICES

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### Schema

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- ↑ **Complexity** – The schema is not overly long or complex.
- ↓ **Data Types** – The schema consists of all string data types with one exception of a date type. Specific data types have the benefit of ensuring data is entered correctly through data type validation. For example, if a claim number can only be numerical values, if it is specified as a Whole Number data type, it will help ensure the accuracy of that field.  
**RECOMMENDATION:** Set each scheme node to an appropriate data type.  
**ESTIMATE:** 1.5 hours.
- ↓ **Naming** - The main data source fields is using default names (i.e. field1, group2, etc). These are problematic because it becomes difficult to impossible to know what these fields are for downstream processes without the original InfoPath form.  
**RECOMMENDATION:** Give descriptive names to all schema nodes.  
**ESTIMATE:** 2 hours.
- ↓ **Grouping** – There is little-to-no grouping of nodes in the schema. Grouping creates a more logical hierarchical structure in the schema making it easier to locate and understand data.  
**RECOMMENDATION:** Organize the schema nodes into logical groups.  
**ESTIMATE:** 1 hour.

### Views

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- ↓ **Control Choice** – Some fields do not use appropriate controls. For example, some date fields are using Text Box controls.  
**RECOMMENDATION:** Use appropriate controls for data types.  
**ESTIMATE:** 1 hour.

## PERFORMANCE

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## Views

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- ↑ **Separate Views** – Your form is broken into multiple views. This will help each view to be more performant.
- ↑ **View Length** – All views are relatively short. Length views with much content can slow performance.

## COST OF OWNERSHIP

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### Code

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- ↑ **Codeless** – No code is present in the form. This simplifies the form and lowers maintenance costs.

### Task Pane

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- ↑ **Task Pane** – No custom task pane is being used. Custom task panes can be useful for certain needs, but require more coding, debugging and maintenance.

### List Boxes

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- ↓ **Population** – All list boxes use hard-coded option lists. These are easy to create, but difficult to maintain long-term as requirements change.  
**RECOMMENDATION:** Create an XML file to use as a secondary data source for populating list box options.  
**ESTIMATE:** 2 hours.

## SECURITY

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### Security

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- ↑ **Security Level** – The form uses recommended automatic security.

## VISUAL DESIGN

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### Design

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- ↑ **Organization** – Form is organized into various groups in each view. This is beneficial to the end user to identify where they are at and what type of information will be required.
- ➔ **Layout** – Layout tables are employed to help keep fields aligned and orderly. However, there is much inconsistency in spacing and vertical alignment of fields.

**RECOMMENDATION:** Ensure layout is consistent and sharp.

**ESTIMATE:** 1.5 hours.

- ➔ **Color** – Form essentially uses 3 colors: Black, white and blue. Black (most text) is in two forms: Normal and Bold. Be wary of overuse of bold—it can become visually distracting. Color can also be used as emphasis. Overuse of color (too many colors) is not a good idea.

**RECOMMENDATION:** Limit use of bold to headers and important items. Use color appropriately.

**ESTIMATE:** 0.5 hours.

- ⬇ **View Switching** – View switching is accomplished via the View menu. This method is not very discoverable and more difficult to use.

**RECOMMENDATION:** Use buttons to create tabs in the views for easier access to view switching.

**ESTIMATE:** 1 hour.

- ⬇ **White Space** – Appropriate use of white space can make a big difference in visual appeal./

**RECOMMENDATION:** Ensure standardized spacing is used and that fields are not too close to each other or borders.

**ESTIMATE:** 2 hours.

- ⬇ **Font Sizes** – Essentially, all text is the same 10pt size. Font sizes can be used to identify importance and grouping.

**RECOMMENDATION:** User fields are normally 10pt, headers 12 – 14pt, field labels 8pt, and form titles much larger 24-36pt. These are just recommendations.

**ESTIMATE:** 0.5 hours.

- ⬇ **Branding** – The form contains no branding except for a form title.

**RECOMMENDATION:** Add branding such as company logo, copyright information, etc.

**ESTIMATE:** 0.5 hours.