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Pei-Pei Lei on Using InfoPath as a Project Management/Data Collection Tool

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Using InfoPath as a Project Management/Data Collection Tool

Hi, my name is Pei-Pei Lei. I'm a survey research analyst in the Center for Health Policy and Research's Office of Survey Research at the University of Massachusetts Medical School.

As colleagues Michelle Landry and Judy Savageau pointed out in their earlier AEA365 blog on Project Management, Microsoft Office provides some options for no/low cost project management tools. I'd like to share our experience using InfoPath, an MS Office solution for data collection purposes, and how it can also fulfill many project management needs.

InfoPath helps users to collect data electronically from end to end. You can design a form template with the needed data elements, and have the collected data automatically submitted into a designated database. In our survey research work, we also use InfoPath for project management; i.e., we collect employee time sheet data (see below). After employees fill out their time sheets and click "Submit" in InfoPath, the data is automatically submitted to a linked Access database.

InfoPath can be customized to monitor project status, track budget/expenses, manage contracts and related information, assist data collection, and submit an application (see below for a sample template).

Project Plan

Project Name: _____   Project Owner: _____

Subtitle: _____   Date Opened: _____ 📅   Date Closed: _____ 📅

Area: _____   Project Number: _____   Status: [Not Started ▼]

Background

_____

Plan

[Type a name for this phase of the plan.]

Owner: _____   Status: [Not Started ▼]   Start Date: _____ 📅   End Date: _____ 📅

[Type a name for this work item.]

Owner: _____   Start Date: _____ 📅   End Date: _____ 📅

[Type a detailed description of this work item.]

Budget

Currency: [Select... ▼]

Expenses

Description	Qty.	Unit Price	Extended Price
	1	0.00	0.00
	Subtotal		0.00

Income

Description	Qty.	Unit Price	Extended Price
	1	0.00	0.00
	Subtotal		0.00

	Balance	0.00

Notes

_____

Contacts

[**View Contact Details**]

Name	E-mail Address	Telephone Number	Company

Related Resources

Name	Web Address

Signatures

Sign and print your name.

_____	_____
Approval 1	**Date**
_____	_____
Approval 2	**Date**
_____	_____
Approval 3	**Date**

The advantages of InfoPath include:

- **Easy to create** - You can create an InfoPath form template from scratch, or convert an existing Excel or Word form into an InfoPath form template.
- **Flexible in form functions** - You can embed many useful functions in the template (e.g., data validations, range limits, conditional formats for certain work flow, automatic time stamps).
- **Convenient to distribute form templates and collect data** - You can distribute form templates to and receive data from multiple recipients using MS Outlook. With access to a shared drive, users can save form templates to their computers and submit data from there.
- **Allows different forms for the same project to be collected simultaneously** - Multiple InfoPath templates can be linked to one database, allowing users to view/complete different forms specific to their roles, and all submit into the same database.
- **It's free** - if you have [these versions of MS Office](#).

Lessons learned: InfoPath can be very useful in project management processes; it is easy to build and distribute for collecting and submitting data into a database (such as SQL, Access, or SharePoint). You will need InfoPath Designer to create the form template. Users will need InfoPath Filler to enter data unless the database is deployed on [SharePoint,](#) which allows users to fill and submit data in a webpage from a computer or mobile device.

Rad resource: [Introduction to Microsoft InfoPath 2010](#)

Rad resource: [Project plan template](#)