

### Developing InfoPath Forms for SharePoint 2010 – 2 Days



#### Overview

This course is an introduction to creating InfoPath forms using InfoPath Designer 2010. It is designed for experienced Microsoft Office/SharePoint/Power users wanting to create forms for use with InfoPath Forms Services in SharePoint server 2010.

#### Target Audience

Anyone responsible for creating or designing InfoPath forms who has basic knowledge of SharePoint technologies at end user level or experience working with a previous version of SharePoint.

#### Course Summary

In this course students will learn how to:

- Streamline business processes by integrating InfoPath forms into SharePoint applications
- Rapidly create dynamic custom forms for deployment to SharePoint
- Build interaction into complex forms without writing code
- Add intelligence to forms with Quick Rules
- Capture external data and convert Office forms to InfoPath for optimal design and publishing

#### Course Content

##### Introduction to InfoPath 2010

###### Leveraging InfoPath forms in your organisation

- Defining the benefits and functionality
- InfoPath Designer
- Forms Services
- InfoPath Filler

###### Centralising data collection for business processes

- Replacing disparate forms throughout your organisation
- Exploring SharePoint lists and libraries
- Submitting results to SharePoint

##### Designing InfoPath Forms

###### Customising form templates

- Extending templates to meet business requirements
- Adding input controls to enhance the user experience
- Setting default values in fields or controls

###### Creating new forms from scratch

- Defining page layout with tables
- Building user-friendly forms
- Applying a consistent look and feel
- Adding repeating tables for many values

## Enabling Dynamic Form Interaction

### Verifying user input based on business rules

- Configuring control properties
- Applying Quick Rules for easy validation without code
- Validating fields with range, required and format conditions

### Conditionally formatting fields

- Changing background colours or fonts
- Hiding form sections in response to user actions
- Building robust cascading drop-down lists
- Executing a query from an action rule

### Defining form actions

- Dynamically setting the value of a field
- Querying and submitting data
- Sending information to a Web Part for drill-down effect
- Setting field properties to read-only

## Accessing External Information

### Retrieving data from multiple sources

- Integrating data with the Data Connection Wizard
- Connecting to data sources and SharePoint lists
- Selecting XML and SQL Server data

### Creating a user interface for business data

- Modifying information inside an InfoPath form
- Submitting changes to the data source
- Loading a repeating table with data

## Enhancing Business Processes with Workflow

### Initiating workflow actions

- Building a form to trigger a workflow
- Adding a workflow to a form library

### Integrating e-mail and tasks

- Coordinating and delegating tasks to information workers
- Embedding the People Picker into forms

### Establishing conditional rules

- Directing workflow actions with form fields
- Setting up automatic task reminders

## Publishing Forms to SharePoint

### Replacing default SharePoint forms

- Submitting to a document library
- Substituting a list default form with an InfoPath form
- Sending a form to SharePoint as a content type

### Assessing deployment options

- Promoting items to a form library to extend reporting
- Utilising administrator-approved templates for complex forms containing custom code

### Securing forms

- Exploring security levels within forms
- Authenticating users with digital signatures
- Working in full trust security zones
- Hiding parts of the form

## Hands-On Exercises for delegates:

- Designing a form from a pre-existing template
- Adding controls to a blank form
- Validating a form with the Design Checker
- Conditionally formatting fields on a form
- Performing a calculation based on input controls
- Populating a drop-down control from SQL Server data

## Course Materials:

Presentation slides/hands-on exercises with CD