

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