



## **Building InfoPath Forms for SharePoint 2010**

Course ISI-1318 - 3 Days - Instructor-led - Hands on

### **Introduction**

This course is for students who will be building, deploying and using digital forms on the SharePoint 2010 platform. You will understand how to create business forms that provide a pleasant, reliable and intuitive experience for your users and customers. InfoPath 2010 is a truly revolutionizing way data is captured, stored, reports and utilized for collaboration.

### **Course Objectives**

After completing this workshop, students will be able to:

- Design and build InfoPath forms without writing code
- Add approval workflows to your InfoPath forms
- Integrate data from SharePoint and other company systems
- Create forms that offer a rich experience in the browser
- Create and use forms in the cloud with SharePoint Online.

### **Prerequisites**

Students taking this class should have proficiency in Microsoft Office products, concentrating in forms development and experience working in a tagged environment such as HTML.

In addition, students should attend Course ISI-1259, SharePoint 2010 for Power Users or have equivalent skills and knowledge.

### **Course Outline**

#### **Module 1: Introducing Microsoft InfoPath 2010**

- Benefits of using InfoPath 2010 with SharePoint 2010
- New features of InfoPath 2010
- How InfoPath works
- Quick tour of the backstage view in InfoPath 2010
- XML 101
- Creating the products.xml file
- Adding products.xml to the form as a data connection
- Using the template to create a form instance
- Exporting the template

**Contact ISI Inc for more information at 916.920.1700 or by visiting our website at <http://www.isinc.com>**



## **Module 2: Form Requirements: Using a Decision Matrix**

- Form templates
- Where's the data
- Your SharePoint version
- Factors to consider
- The design checker
- Combine client-based and browser-based controls
- Using the decision matrix

## **Module 3: Form Design Basics: Working with InfoPath Layouts, Controls and Views**

- Form layout
- Adding a layout and table
- InfoPath controls
- Control properties ribbon
- Understanding the basics of data binding
- Adding controls to the flight delay form
- Adding a submit button with a rule to the flight delay form
- Views
- Adding a second view to the flight delay form

## **Module 4: Working with SharePoint List Forms**

- Basics of a SharePoint list
- List form layout
- List form fields
- Calculated fields
- List form pages
- Limitations of list forms
- Form options

## **Module 5: Adding Logic and Rules to Forms**

- Primary types of form logic in InfoPath
- Working with validation and formatting
- Using functions to set a default value
- Adding action and formatting rules
- Working with sections and conditional formatting
- Using rules to create a wizard-style form with multiple views

## **Module 6: Publishing and Submitting Form Data**

- Publishing methods
- Promoting columns
- Submitting to SharePoint
- Publishing as a content type
- Administrator-approved templates

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### **Module 7: Receiving Data from SharePoint lists and Business Connectivity Services**

- Receive data connections
- Adding a SharePoint list data connection
- Data connection libraries
- The external item picker and business connectivity services
- Adding a filter to a business connectivity external content type

### **Module 8: Using the InfoPath Form Web Part**

- Web part settings
- Web part connections
- Parameters
- Other parameters

### **Module 9: Working with the SharePoint User Profile Web Service**

- Building the foundation of the event registration form
- Creating form load rules on the event registration form
- Adding a people picker and submit button to the event registration form

### **Module 10: InfoPath Integration with SharePoint Designer Workflows**

- Introduction to workflows
- Workflow invitation
- Custom actions
- Workflow task forms
- External list forms

### **Module 11: Building an Approval Process**

- Gathering requirements
- Contoso reimbursement form
- Form views
- Approval fields
- The status field
- Form load rules
- Approval sections
- Submit button actions
- Workflow approvers
- Workflow for Emails

### **Module 12: Advanced Options**

- The InfoPath rule inspector
- Merging forms
- Relinking forms

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- Browser and filter buttons
- Offline forms
- Email attachments
- Form preview
- Default values
- Advanced functions

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