Synergy Technology Information Worker Training Series

Microsoft Office InfoPath Design

Course Outline

The purpose of this day long course is to educate course attendees on the numerous uses for InfoPath Forms in SharePoint. In addition to learning about the capabilities and limitations of InfoPath Designer, students will learn about when to use Custom List and Library Forms, how to leverage InfoPath Document Information Panels to enhance Enterprise Document Management, and how to create and use data connections to surface existing data from Line-Of-Business systems or other data repositories. Attendees will also learn about advanced form design concepts including conditional formatting, data validation, content types, views, and the requirements for forms using code-behind.

Skills Gained

After completing the course, students will:

- Understand the capabilities and benefits provided by InfoPath Forms in SharePoint

- Understand the components of InfoPath and SharePoint Forms Services

- Understand the ribbon, controls, and tabs in the InfoPath Designer application

- Know how to customize and publish SharePoint List Forms and views

- Understand and be able to determine when to use List Forms and Library Forms

- The capability to design, customize and publish SharePoint Library Forms and Content Types

- Leverage InfoPath capabilities to enhance Enterprise Document Management using the Document Information Panel

- Know how to use the many InfoPath controls, and create Rules for validation and formatting

- How to create and use Data Connections to numerous data sources and bind them to Form controls

Target Audience

The class is geared towards Power Users, Content Managers, and Designers wanting to gain knowledge and experience using InfoPath capabilities in SharePoint. This includes individuals who have SharePoint Site Administrator experience, or individuals that have a working knowledge of customizing the SharePoint environment as a designer, but desire a more comprehensive and structured knowledge of InfoPath's capabilities and functionality in the SharePoint environment.

Prerequisites

Students attending this class should have a working knowledge of SharePoint and its structures and capabilities. This class is also appropriate for individuals that work in other technical or business capacities related to SharePoint who wish to understand the capabilities of Infopath as a means to collect and display structured data. Attendees should have literacy with basic document management, and be familiar with Microsoft Office applications.

1. Overview of Microsoft Office InfoPath in SharePoint

This chapter provides an introduction and overview of the numerous uses for Microsoft Office InfoPath in SharePoint. Numerous, new features were introduced in InfoPath and with SharePoint Forms Services, making it easy to build powerful SharePoint applications. InfoPath also gives the SharePoint Designer and Site Administrator capabilities to further extend the capabilities of the close integration between client applications and SharePoint.

Key Concepts: uses for InfoPath, feature comparison, new features

2. Introduction to the InfoPath Form Designer

In this chapter, we will be diving into the basics of form design using the InfoPath Form Designer. We will cover the basic capabilities starting with the Backstage View, and move through the Form Designer interface to highlight some of the key features of this tool and the ribbon controls provided by InfoPath Form Designer.

Key Concepts: designer ribbon tabs, publishing, backstage, key features

3. Customizing SharePoint List Forms

The ability to customize SharePoint list forms using InfoPath is a welcome addition to the capabilities provided by SharePoint Designer, which was available in Microsoft Office SharePoint Server 2007. SharePoint retains this capability. However, we can now modify the New Item Form from within the SharePoint List ribbon toolbar using InfoPath Designer. The ease of modifying these forms in InfoPath Designer makes this capability much easier to do than in SharePoint Designer.

Key Concepts: customizing SharePoint list forms, capabilities and limitations of list forms

4. Creating and Publishing Forms to SharePoint Form Libraries

The choice of when to create SharePoint List forms or when to create SharePoint Forms Library forms can be challenging. In this chapter, we will provide some guidelines for when to select a List form versus a Library form. When designing InfoPath forms for SharePoint, the first choice you need to make is between a SharePoint list form and a SharePoint form library form. Apart from determining where you will start the design process, making the correct determination will ensure that the functionality of the form itself meets the design requirements as well as what you wish to do with the data that is collected.

Key Concepts: form design, deciding what type of form to use, form library forms

5. Forms and Document Management: Content Types and Document Information Panels

In this chapter, we will be covering the different ways InfoPath forms can be used in Document Management, as well as the ability to create reusable forms with Content Types. We will also discuss the uses for and customizing the Document Information Panel, or DIP.

Key Concepts: reusable templates, document information panels, content types

6. Controls, Rules, and Data Validation in InfoPath Forms

Building advanced functionality into InfoPath forms can be as simple or complex as the designer wants. We can use existing data or rules for data validation to ensure the accuracy and appropriateness of the data we are collecting in our forms. These can be simple data comparisons, or we can use a series of rules to provide complex, multi-faceted validation. In this chapter, we are going to dive into some of the controls, rules and validation that are available in InfoPath.

Key Concepts: form controls, data validation, conditional formatting, rules

7. Using Data Connections

In this chapter, we explain how to create connections between InfoPath forms and external data sources. Data connections allow drop-down boxes to be populated from database tables and allow the data collected on the form to be submitted to a web service. One of the key benefits of using a data connection, is that the data can be maintained separately in a single location and the form will always pull in the most up to date information from that location.

Key Concepts: data connections; data sources; using data connections in controls