

# Technical Training Solutions



## Beginning InfoPath 2010 for SharePoint 2010

Technical  
Course  
Outline

(2 Day Course)

### Course Summary

In this course, students will learn how to use InfoPath 2010 to gather and share information by creating and implementing XML-based forms that can integrate with SharePoint 2010. Additionally, students will bind InfoPath forms to various SharePoint 2010 data sources such as lists and Business Connectivity Services (BCS) content types.

### Intended Audience:

This course is intended for those SharePoint 2010 users who will be designated as having Site Administration privileges.

### Prerequisites:

To ensure the best learning experience for all participants, the following pre-requisites *must be met* in order to participate in this course:

- All students must have solid end user familiarity with SharePoint 2010 and Office 2010.

### Course Contents:

#### Introducing Microsoft InfoPath 2010

- Benefits of Using InfoPath 2010 with SharePoint 2010
- Quick Tour of the Backstage View in InfoPath 2010
- XML 101
  - Adding an XML File to a Form as a Data Connection
- Using the Template to Create a Form Instance
- Exporting the Template

#### Form Requirements: Using a Decision Matrix

- Form Templates
- Factors to Consider
  - Where's the Data?
  - Your SharePoint Version
- The Design Checker
- Combine Client-Based and Browser-Based Controls

#### Form Design Basics: Working with InfoPath Layout, Controls, and Views

- Form Layout
- Adding a Layout and Table
- InfoPath Controls and Adding Controls to a Form
- Control Properties Ribbon
- Understanding the Basics of Data Binding
- Adding a Submit Button with a Rule to a Form
- Views

#### Working with SharePoint List Forms

- Limitations of List Forms
- List Form Layout
- Calculated Fields
- List Form Pages & Fields
- Form Options

#### 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

#### Publishing and Submitting Form Data

- Publishing Methods
- Promoting Columns
- Submitting to SharePoint
- Publishing as a Content Type

#### Receiving Data from SharePoint Lists and BCS

- 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

#### Using the InfoPath Form Web Part

- Web Part Settings
- Web Part Connections
- Parameters
- Other Parameters

#### InfoPath Integration with SharePoint Designer Workflows

- Workflow Initiation Forms
- Workflow Task Forms
- External List Forms

#### Advanced Options

- The InfoPath Rule Inspector
- Merging Forms
- Relinking Forms
- Browser and Filler Buttons
- Offline Forms
- Email Attachments
- Preview
- Default Values