

InfoPath 2007 Power User



2 day Training Course

This two day course is intended for delegates wishing to be introduced to InfoPath 2007 so that they can create forms from templates and customize them, generate forms from scratch and also from data sources. Publish forms to SharePoint with or without form services, run the design compatibility checker, learn how to apply conditional formatting, calculations and formulas to your forms. Explore the new InfoPath 2007 features.

Module 1 – An Overview of InfoPath

- Why use InfoPath to create forms
- Filling out Forms
- Shortcuts
- Emailing a Form
- Merging forms with Microsoft Excel
- Use Outlook to receive and fill out forms
- Fill out forms using a browser and form services
- Summary Forms
- Exporting Forms as PDFs

Module 2 – Creating Forms

- Customize Templates
- Create forms from Scratch
- Create forms based on a backend database, XML File, XSD File, or Web Service

Module 3 - Building a Form

- Data Source creation
- Controls
- Views
- Reusable Template Parts
- Design Checker

Module 4 – Calculations and Actions

- Calculating Fields in Infopath
- Actions on Controls
- Conditional Formatting
- An overview of Formulas

Module 5 – Workflows

- Building Workflows in InfoPath
- Using SharePoint workflows in InfoPath

- MOSS Approval Workflow

Module 6 – An overview of the Form Library

- Templates
- Checking In/Out forms
- Meta data
- Versioning
- Approval

Module 7 - Publishing Forms to a Form Library

- Publishing Options
- File Types
- Promoting InfoPath Fields as Form Library columns
- Publishing to non SharePoint locations

Archiving Forms

- Archiving forms as PDF's

Optional Module – Extending the forms with code

- Setting up MSE
- Trapping Events with script
- Visual Studio in InfoPath