

Creating Forms Using Microsoft InfoPath 2007

50431: Creating Forms Using Microsoft InfoPath 2007 (2 Days)

About this Course

This two day self-paced course provides students with the knowledge and skills needed to develop InfoPath forms. The course focuses on the InfoPath client as a forms development tool and does not contain any programming code.

Audience Profile

This course is intended for any user who is looking to automate forms. Familiarity with Microsoft Office products is helpful.

At Course Completion

After completing this course, students will be able to: Understand the interface of InfoPath 2007

- Develop a custom form.
- Customize a sample form.
- Send a form via e-mail.
- Write form data to a database.
- Set up form logic.
- Implement business rules into a form.
- Create different views.
- Publish a form.

Course Outline

Module 1: An Introduction to InfoPath

This module discusses InfoPath 2007, describes the difference between form templates and form instances, and between InfoPath Client and InfoPath Forms Services.

Lessons

- What is InfoPath
- Form Templates and Forms
- InfoPath Form Services

After completing this module, students will be able to:

- Explain the main uses and benefits of InfoPath.
- Understand the type of file InfoPath saves data as.
- Explain the difference between InfoPath Client and InfoPath Forms Services.

Module 2: Exploring the InfoPath Environment

This module explains the basics of the InfoPath environment for form development.

Lessons

- Designing a Form Template
- Viewing Your Form
- Saving Your Form
- Interface Overview
- Task Panes Overview

Lab : Exploring the InfoPath Environment

- Exercise 2-1: Customizing a Sample
- Exercise 2-2: Viewing Your Form
- Exercise 2-3: Saving Your Sample Form

After completing this module, students will be able to:

- Use the Getting Started dialog box to begin creating a form.
- Navigate between the Design and Preview modes in a form.
- Save both a form and data that has been collected in a form.
- Identify the various sections of the InfoPath user interface.
- Explain the purpose of the task pane.

Module 3: Creating a New Form

This module explains how to create a new form from scratch, including the logic and layout design of a form, as well as adding controls to a form, setting properties, formatting, and creating views.

Lessons

- Steps to Creating a New Form
- Designing the Layout
- Using Controls
- Views
- Advanced Formatting

Lab : Creating a New Form

- Exercise 3-1: Designing the Employee Information Form
- Exercise 3-2: Designing the Layout for the Employee Background Information Form
- Exercise 3-3: Designing the Layout for the Employee Background Information Form
- Exercise 3-4: Adding Controls
- Exercise 3-5: Adding Repeating Controls
- Exercise 3-6: Setting Properties of Controls
- Exercise 3-7: Creating a View
- Exercise 3-8: Creating a View
- Exercise 3-9: Applying a Color Scheme

After completing this module, students will be able to:

- Identify requirements for a new form.
- Design the layout of a new form.
- Determine the types of controls needed for a form.
- Use Layout Tables to create a structure for a form.
- Add controls to a form.
- Set Properties for controls.
- Create different views for a form.
- Apply a color scheme and conditional formatting to a form.

Module 4: Importing and Exporting Forms

This module explains how to import existing forms from Word and Excel to take advantage of the design features of InfoPath 2007.

Lessons

- Importing Forms from Microsoft Word
- Importing Forms from Microsoft Excel

Lab : Importing and Exporting Forms

- Exercise 4-1: Importing a Form from Microsoft Word
- Exercise 4-2: Importing a Form from Microsoft Word
- Exercise 4-3: Importing a Form from Microsoft Excel

After completing this module, students will be able to:

- Import a form from Microsoft Word.

- Import a form from Microsoft Excel.

Module 5: Adding Logic without Writing Code

This module explains how to gain functionality in a form in a non-programmatic way by adding logic using validation and rules to controls on a form.

Lessons

- Data Validation
- Rules

Lab : Importing and Exporting Forms

- Exercise 5-1: Configuring Data Validation
- Exercise 5-2: Configuring Rules

After completing this module, students will be able to:

- Use data types to automatically validate data.
- Configure the properties of a control for validation.
- Create rules to execute actions on a form.

Module 6: Saving and Submitting Form Data

This module explains how to save form data to an XML file and submit a form through e-mail.

Lessons

- Saving Form Data
- Submitting Form Data
- Submitting Form Data in an E-mail Message

Lab : Saving and Submitting Form Data

- Exercise 6-1: Saving the Form
- Exercise 6-2: Modifying the Save Options
- Exercise 6-3: Submitting a Form Using E-mail

After completing this module, students will be able to:

- Save a form as an XML file.
- Disable a user's ability to save a form.
- Configure a form to force users to submit data.
- Configure a form to allow for e-mail submission.

Before attending this course, students should have:

- A generalized knowledge of managed business processes.
- A basic understanding of Microsoft Word, Microsoft Excel or other Web form development tool.