

# Microsoft InfoPath

Duration: 2 Days

Method: Instructor-Led Training (ILT)

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## Course Description

Participants will learn how to use Microsoft InfoPath 2010/2013 to gather and share information by creating and implementing XML-based forms.

## Target Audience

This course is intended for:

- Persons who need to gather, reuse, distribute, and collaborate using XML-based forms like the following:
  - Persons with Web design experience
  - Form Administrators
  - Information Coordinators
  - Microsoft Office System Power Users

## Prerequisites

To attend this course, participants should have:

- Proficiency in Microsoft Office products especially forms development.
- Experience working in a tagged environment (such as HTML or Frame maker with SGML).

## Course Objectives

Upon successful completion of this course, participants will be able to:

- Create InfoPath forms.
- Import and export forms.
- Customize a form layout.
- Manage views.
- Apply security to forms.
- Distribute forms.
- Manage controls.
- Work with a database.



## Course Topics

### Lesson 1: Creating InfoPath Forms

- **Topic 1A:** Explore the InfoPath 2010 Interface
- **Topic 1B:** Draft a Form
- **Topic 1C:** Add Data Validation Rules
- **Topic 1D:** Test a Form

### Lesson 2: Importing and Exporting Forms

- **Topic 2A:** Import Form Data Using InfoPath Designer
- **Topic 2B:** Export Form Data to Excel Using InfoPath Filler
- **Topic 2C:** Export Form Data to the Web Using InfoPath Filler

### Lesson 3: Customizing Form Layouts

- **Topic 3A:** Customize Tables
- **Topic 3B:** Format a Form
- **Topic 3C:** Insert Graphical Objects
- **Topic 3D:** Create Sections
- **Topic 3E:** Merge Forms

### Lesson 4: Managing Views

- **Topic 4A:** Create Custom Views
- **Topic 4B:** Assign User Roles to a View

### Lesson 5: Applying Security to Forms

- **Topic 5A:** Protect InfoPath Forms
- **Topic 5B:** Restrict Access to a Form
- **Topic 5C:** Set Security Zones

### Lesson 6: Distributing Forms

- **Topic 6A:** Publish a Form
- **Topic 6B:** Publish a Form to Email Recipients
- **Topic 6C:** Troubleshoot Publishing Problems

### Lesson 7: Managing Controls

- **Topic 7A:** Describe Data Source Concepts
- **Topic 7B:** Customize Controls
- **Topic 7C:** Bind Controls

### Lesson 8: Working with a Database

- **Topic 8A:** Develop a Form from a Database
- **Topic 8B:** Use InfoPath Forms to Add Records to a Database
- **Topic 8C:** Use InfoPath Forms to Query a Database
- **Topic 8D:** Populate Form Controls from a Database

## ACTIVITIES INCLUDED

