



BUILDING TRAINING SOLUTIONS  
FOR THE IT WORLD

**Number of Days:** 1  
**Format:** Instructor-Led  
**Class Code** INFOPATH10

**Recommended Course  
Sequence**

Knowledge of prerequisites  
noted below.

*Course content is subject to change  
without notice.*

**Course Description:**

You will work with the features of InfoPath.

**Target Student:**

Persons with Web Design experience, forms administrators, information coordinators, MS Office system power users who need to gather, reuse, distribute and collaborate using XML based forms.

**Prerequisites:**

Students taking this class should have proficiency in MS Office products, concentrating in forms development and experience working in a tagged environment (like HTML or Frame maker with SGML).

**Delivery Method:**

Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

**Course Objectives:**

Upon successful completion of this course, students 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 Outline

### Lesson 1: Creating InfoPath Forms

<b>Topic 1A: Explore the InfoPath 2010 Interface</b>
<ul style="list-style-type: none"><li>■ Microsoft InfoPath Designer 2010</li><li>■ Microsoft InfoPath Filler 2010</li><li>■ The InfoPath Designer 2010 Interface Elements</li><li>■ The Backstage View</li><li>■ Form Templates</li><li>■ InfoPath Forms</li><li>■ The InfoPath Help Window</li><li>■ How to How to Explore the InfoPath 2010 Interface</li></ul>
<b>Topic 1B: Draft a Form</b>
<ul style="list-style-type: none"><li>■ The Tables Gallery</li><li>■ Form Controls</li><li>■ Control Properties</li><li>■ Form Layouts</li><li>■ Form Design Guidelines</li><li>■ Template Parts</li><li>■ How to How to Draft a Form</li></ul>
<b>Topic 1C: Add Data Validation Rules</b>
<ul style="list-style-type: none"><li>■ Data Validation</li><li>■ Quick Rules</li><li>■ The Rules Task Pane</li><li>■ How to How to Add Data Validation Rules</li></ul>
<b>Topic 1D: Test a Form</b>
<ul style="list-style-type: none"><li>■ The Design Checker Task Pane</li><li>■ The Rule Inspector Dialog Box</li><li>■ How to How to Test a Form</li></ul>

### Lesson 2: Importing and Exporting Forms

<b>Topic 2A: Import Form Data Using InfoPath Designer</b>
<ul style="list-style-type: none"><li>■ Form Import Options</li><li>■ How to Import Form Data Using InfoPath Designer</li></ul>
<b>Topic 2B: Export Form Data to Excel Using InfoPath Filler</b>
<ul style="list-style-type: none"><li>■ The Export to Excel Option</li><li>■ How to How to Export Form Data to Excel Using InfoPath Filler</li></ul>
<b>Topic 2C: Export Form Data to the Web Using InfoPath Filler</b>
<ul style="list-style-type: none"><li>■ How to How to Export Form Data to the Web Using InfoPath Filler</li></ul>

### Lesson 3: Customizing Form Layouts

<b>Topic 3A: Customize Tables</b>
<ul style="list-style-type: none"><li>■ Tables</li><li>■ Alignment Options</li><li>■ How to How to Customize Tables</li></ul>
<b>Topic 3B: Format a Form</b>
<ul style="list-style-type: none"><li>■ The Themes Gallery</li><li>■ Conditional Formatting</li><li>■ Headers and Footers</li><li>■ How to How to Format a Form</li></ul>
<b>Topic 3C: Insert Graphical Objects</b>
<ul style="list-style-type: none"><li>■ Illustrations</li><li>■ How to How to Insert Graphical Objects</li></ul>
<b>Topic 3D: Create Sections</b>
<ul style="list-style-type: none"><li>■ Sections</li><li>■ The Section Properties Dialog Box</li><li>■ How to How to Create Sections</li></ul>
<b>Topic 3E: Merge Forms</b>
<ul style="list-style-type: none"><li>■ Form Merge</li><li>■ How to How to Merge Forms</li></ul>

## Lesson 4: Managing Views

<b>Topic 4A: Create Custom Views</b>
<ul style="list-style-type: none"><li>■ Views</li><li>■ The View Properties Dialog Box</li><li>■ How to How to Create Custom Views</li></ul>
<b>Topic 4B: Assign User Roles to a View</b>
<ul style="list-style-type: none"><li>■ User Roles</li><li>■ How to How to Assign User Roles to a View</li></ul>

## Lesson 5: Applying Security to Forms

<b>Topic 5A: Protect InfoPath Forms</b>
<ul style="list-style-type: none"><li>■ Form Security Options</li><li>■ Digital Certificate</li><li>■ Digital Signature</li><li>■ How to Protect InfoPath Forms</li></ul>
<b>Topic 5B: Restrict Access to a Form</b>
<ul style="list-style-type: none"><li>■ Information Rights Management</li><li>■ The Security Levels</li><li>■ How to How to Restrict Access to a Form</li></ul>
<b>Topic 5C: Set Security Zone</b>
<ul style="list-style-type: none"><li>■ Security Zones</li><li>■ How to How to Set Security Zones</li></ul>

## Lesson 6: Distributing Forms

<b>Topic 6A: Publish a Form</b>
<ul style="list-style-type: none"><li>■ The Publishing Process</li><li>■ Publish Forms Options</li><li>■ Microsoft SharePoint 2010</li><li>■ Form Library Columns</li><li>■ How to How to Publish a Form</li></ul>
<b>Topic 6B: Publish a Form to Email Recipients</b>
<ul style="list-style-type: none"><li>■ How to How to Publish a Form to Email Recipients</li></ul>
<b>Topic 6C: Troubleshoot Publishing Problems</b>
<ul style="list-style-type: none"><li>■ The Troubleshooting Process</li><li>■ How to</li></ul>

## Lesson 7: Managing Controls

<b>Topic 7A: Data Source Concepts</b>
<ul style="list-style-type: none"><li>■ Data Source</li><li>■ XML</li><li>■ XML Schemas</li><li>■ How to</li></ul>
<b>Topic 7B: Customize Controls</b>
<ul style="list-style-type: none"><li>■ How to Customize Controls</li></ul>
<b>Topic 7C: Bind Controls</b>
<ul style="list-style-type: none"><li>■ The Binding Feature</li><li>■ How to How to Bind Controls</li></ul>

## Lesson 8: Working with a Database

<b>Topic 8A: Develop a Form from a Database</b>
<ul style="list-style-type: none"><li>■ Databases</li><li>■ Tables</li><li>■ Submit Options</li><li>■ How to How to Develop a Form from a Database</li></ul>
<b>Topic 8B: Use InfoPath Forms to Add Records to a Database</b>
<ul style="list-style-type: none"><li>■ How to How to Use InfoPath Forms to Add Records to a Database</li></ul>
<b>Topic 8C: Use InfoPath Forms to Query a Database</b>
<ul style="list-style-type: none"><li>■ Queries</li><li>■ Data Connections</li><li>■ How to How to Use InfoPath Forms to Query a Database</li></ul>
<b>Topic 8D: Populate Form Controls from a Database</b>
<ul style="list-style-type: none"><li>■ How to How to Populate Form Controls from a Database</li></ul>