

Microsoft InfoPath 2013

1. Use InfoPath Designer 2013

- ❖ Why Use an InfoPath Form?
- ❖ What Does InfoPath Do for My Lists?
- ❖ Why Use InfoPath Forms in Workflows?
- ❖ How Does InfoPath Integrate with My Data?
- ❖ InfoPath Versus Web Controls and Web Parts
- ❖ What Is the InfoPath Web Part?

2. Create a SharePoint Form with InfoPath Designer

- ❖ Design a SharePoint Form Using the Blank Form Template
- ❖ Add Controls
- ❖ Preview Your Form
- ❖ Name Your Data Fields
- ❖ Add Submit Options
- ❖ Publish Your Form
- ❖ Use Your Form in SharePoint
- ❖ Create a Form Library from InfoPath

3. Use SharePoint Form Controls

- ❖ What Are Input Controls?
- ❖ What Are Object Controls?
- ❖ What Are Container Controls?
- ❖ Drag Controls on Your Form
- ❖ Allow Users to Enter Text
- ❖ Make a Text Box Read-Only
- ❖ Make a Text Box Multiline
- ❖ Allow Users to Select a Single Selection from a List of Items
- ❖ Allow Users to Select Multiple Items from a List of Items
- ❖ Allow Users to Select an Optional Single Choice
- ❖ Allow Users to Select from Various Options
- ❖ Allow Users to Enter a Date/Time
- ❖ Allow Users to Select a Person
- ❖ Allow Users to Select from a SharePoint External Content Type
- ❖ Allow Users to Initiate an Action
- ❖ Show Optional Controls on Your Form
- ❖ Allow Users to Enter Multiple Instances of the Same Fields
- ❖ Allow Users to Choose Which Set of Fields to Use
- ❖ Make a Control/Field Required

4. Create SharePoint Form Rules

- ❖ Hide or Show Controls Based on a Selected Option
- ❖ Format an Entry Based on a Condition
- ❖ Implement a Validation Rule
- ❖ Add an Action Rule to a Button
- ❖ Use Rules for Form Submission
- ❖ Use Rules for Form Loading
- ❖ Validate Data Entry Using Patterns

5. SharePoint Form Functions

- ❖ Use the SharePoint URL Functions
- ❖ Calculate a Future Date
- ❖ Get the Current SharePoint User
- ❖ Remove Leading and Trailing Spaces from a Field Value
- ❖ Remove All Spaces from an Entry
- ❖ Default a Blank Amount to Zero
- ❖ Calculate the Sum of All Items
- ❖ Determine a Count of the Items Entered
- ❖ Obtain a Portion of an Entered String
- ❖ Obtain the Username from SharePoint Online (Office 365)
- ❖ Add Years to a Date Preserving the Month and Day

6. Create SharePoint Form Page Designs and Views

- ❖ Change the Current View Name
- ❖ Create a New View
- ❖ Make a View Read-Only
- ❖ Prevent a User from Selecting a View
- ❖ Use a Different Layout for Your Form
- ❖ Use a Theme for Your Form
- ❖ Add Headers/Footers to Your Form
- ❖ Insert a Table Layout into Your Form
- ❖ Modify a Table Layout in Your Form

7. SharePoint List Forms

- ❖ Use a Form to Create a SharePoint List
- ❖ Modify the Form of an Existing SharePoint List
- ❖ Set Your List Form Template Back to the Default Form

8. Submit and Publish to SharePoint

- ❖ Enable Your Form for Submission
- ❖ Configure Email Submission
- ❖ Publish Your Form to Email
- ❖ Configure SharePoint Library Submission
- ❖ Publish Your Form to a SharePoint Library
- ❖ Use Multiple Forms in SharePoint Libraries
- ❖ Configure Web Service Submission
- ❖ Configure SharePoint Server Connection Submission
- ❖ Modify the Available Menu Buttons during Form Submission

9. Use Data in SharePoint Forms

- ❖ Use Data from a Database
- ❖ Convert an InfoPath Connection to a SharePoint Connection File
- ❖ Use Data from a SharePoint List
- ❖ Use Data from a SharePoint Data Connection File
- ❖ Use Data from a (SOAP) Web Service
- ❖ Populate a Drop-Down List with Data
- ❖ Populate a Drop-Down List with Data Based on another Selection (Cascading Drop-Down)
- ❖ Display Data from a SharePoint List
- ❖ Display a Repeating Table from a SharePoint List
- ❖ Leverage External Data from a SharePoint External Content Type (Business Data Connectivity Services)

10. Use the InfoPath Form Web Part

- ❖ Add an InfoPath Form Web Part to a SharePoint Web Part Page
- ❖ Create a Master/Detail Display Form for SharePoint Lists
- ❖ Expose Form Fields as Web Part Connection Parameters
- ❖ Create a Form to Send Data to Web Parts

11. Using Forms in SharePoint Workflows

- ❖ Create a SharePoint Workflow for a Form Library
- ❖ Include a Link to the Form in an Email
- ❖ Add a Task to the Workflow
- ❖ Perform Workflow Actions Based on Form Values
- ❖ Perform One Workflow Action
- ❖ Get a User from a People/Group Picker Control
- ❖ Customize the Task Form
- ❖ Add Form Parameters Used When Starting Your Workflow

12. Enhance the User Experience

- ❖ Display a Read-Only Value
- ❖ Compact Sections of Fields/Controls
- ❖ Configure Dynamic Sections
- ❖ Make Screen Tips Informative for Validation
- ❖ Notify the User of Successful Submission
- ❖ Create a Tabbed Navigation in Your Form
- ❖ Use Pictures as Choices

13. Using Template Parts to Create Reusable Form Components

- ❖ Create a New Template Part
- ❖ Add Common Data Connections
- ❖ Add Common Controls
- ❖ Add Common Fields
- ❖ Save Your Form Template Part
- ❖ Add Your Template Part as a Custom Control
- ❖ Use Your Template Part as a Control
- ❖ Change the Name of Your Custom Control
- ❖ Change the Icon of Your Custom Control

14. Customize a Document Information Panel Content Type

- ❖ Create the Document Library
- ❖ Add Columns to Your DIP
- ❖ Modify the DIP

15. Leverage Visual Studio 2012 with InfoPath

- ❖ Access Your Form within a Visual Studio Solution
- ❖ Create an InfoPath 2013 Add-In
- ❖ Create a Custom Task Pane