



InfoPath Master Training **3 day course**

Provided by Qdabra, the Leader in Large Scale InfoPath Solutions

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Became an InfoPath master!

Qdabra, one of the leading voices in InfoPath today, is offering their popular training class for users of InfoPath who are beyond the basics.

This intermediate to advanced level class is meant to take current users of InfoPath to the next level of form design and integration. Through hands-on labs and expert-led lecture, students will be taken through steps to create codeless forms solutions that minimize administrative costs and maximize the value of InfoPath in the organization.

Who is this class for?

This class is designed for business users who are familiar with InfoPath and now need to extend it to SharePoint, create complex forms, design or extend schema, export data to SQL and perform data validation. It is not necessary to have programming or developer experience for this class.

Prerequisites

This class expects you to have a **working knowledge of InfoPath**, including forms creation, familiarity with basic controls and layout, basic understanding of the form's data source, form security experience and form publishing. It is also helpful to have a general understanding of rudimentary XML and SQL in order to work with some of the more complex features of form design and implementation.

At Class Completion:

At the end of the class, students should be able to

- Create forms with multi-user views, professional design elements, and customized task panes and toolbars
- Use rules and conditions instead of code to provide a forms solution with low administrative overhead
- Work with external data - XML, SharePoint, web services, database; storing form data into database
- Integrate forms to SharePoint using content types, create browser-enabled forms solutions,

and SharePoint out of box as well as SharePoint Designer workflow

- Achieve familiarity with resource files and modifying manifest.xsf if needed
- Use InfoPath forms to consume data from other applications
- Perform complex data validation to make user input more valuable
- Have a working knowledge of schema best practices and be able to design a data source from scratch
- Achieve familiarity with how forms interact with each other and be able to move data between and in and out of forms.

Course Materials:

Comprehensive lecture and lab materials will be provided for each student. Students will also be provided with a complete virtual environment that will have InfoPath, SharePoint, Active Directory and all other materials needed for successful completion of the lab material.

Course Outline:

This course is comprised of 8 modules. A summary of each is provided below. *Qdabra reserves the right to make minor modifications to this outline based on student response and instructor technique.*

Module 1 - Getting Started

This module explores the main characteristics that make InfoPath one of the best platforms for data gathering in an organization. Main topics in this module are:

- Why InfoPath?
- XML-based form creation
- Form template vs form
- Elements of the InfoPath UI
- Design task pane
- Controls, Repeating/optional controls
- Multiple views
- Labs: Getting started with InfoPath

Module 2: Working with Schemas

This module covers the basics of good schema design such as adding default values to form controls, secondary data connections, and displaying data from secondary data sources. We will also learn how to create a form from an existing XML schema. Main topics in this module are:

- Models of schemas
- Data sources
- Source files
- Namespace
- Lab: working with schema design and form files

Module 3: SharePoint Integration

This module explores SharePoint feature sets and learns how to create a workflow around our form with a special introduction to SharePoint Designer. We will create a UDC Connection in SharePoint and learn how to create a data connection to pull data from a SharePoint list. Main topics in this module are:

- InfoPath/SharePoint integration
- Forms Services and browser-enabled forms
- Publishing options
- Form fields promotion
- Accessing forms from SharePoint
- Workflow – SharePoint Out of box workflow and SharePoint Designer workflow
- Lab: Using InfoPath with SharePoint, SharePoint Designer Workflow

Module 4: Template Parts and Reusability

This module explores how to create reusable components in InfoPath. XTPs or template parts are a great way to reuse information from one form to the next without coding. In this module, we will also create a template part that can be used to incorporate an electronic signature into a form using SharePoint data connections. Main topics in this module are:

- Create a template part from scratch, or from an existing form

- Lab: Electric signature Template part

Module 5: Form Logic

In this module, we look at using conditional formatting to ensure that your users will see what you want them to see in your control set and we will examine ways of validating the data your users are entering to ensure it is correct and appropriate. Main topics in this module are:

- Conditional Formatting
- Default value vs rules
- Rules
- Debugging rules and conditions
- Lab: Creating form logic with rules

Module 6: Working with External Data

In this module, we learn how to interface InfoPath with Excel by creating a pivot table off data that comes from a form. We map form data to a SQL database and work with the information it deposits. Main topics in this module are:

- External data storage options: SharePoint, resource files, database
- Web services
- creating an Excel report from SQL data
- Lab: Working with external data – resource files, Active Directory, form submission using a web service, Qdabra tool DBXL to map to SQL

Module 7: High Impact Design

In this module, we look all the options for creating an enjoyable experience for our end user. Main topics in this module are:

- Design and user experience
- Best practices
- Custom toolbars
- Custom task panes
- Lab: creating custom toolbars and task pane



Module 8: Best Practices

This module examines some ways to ensure your forms will always be designed with the above criteria in mind.

Location:

Computer Classrooms in Seattle
10604 NE 38th Place, Suite 118
Kirkland, WA 98033

Located in **Quad One North** Bld., Yarrow Bay Office Park.

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Cost: \$1,850.00

Includes hotel room for three nights (check-in: the day before the class start, check-out: last day morning), and lunch and morning continental breakfast for three days. The class will begin at 8:30 a.m. and end at approximately 4:30 p.m. with a 1 hour break for lunch. In case of without hotel, \$300.00 is reduced from the class cost.

Hotel: the LaQuinta Inn 10530 NE Northup Way, Kirkland, WA 98033, in walking distance from the

classroom.

Attendee: minimum 4, maximum 12

Additional Information:

Not sure if this class is right for you? Please email Patrick Halstead for additional information at CourseManager@qdabra.com

Also available **private Webinar** course, three days, cost of \$995. Requires at least 3 total registered.

