



Information Technology

Developing SharePoint InfoPath Forms

Course Introduction

This training course is designed to provide participants with the essential knowledge and skills to design advanced forms for efficient data collection without the need for coding. The course focuses on creating InfoPath forms that seamlessly integrate with Microsoft SharePoint. Through this training, you will develop the ability to incorporate interactive elements into complex forms, extract external data, and transform Office forms into InfoPath for enhanced design and publishing capabilities. Additionally, you will explore how to integrate InfoPath forms into custom SharePoint workflows, automate business processes, and enhance form functionality using Quick Rules.

Target Audience

- Cloud Computing Engineer
- Computer Network Specialist
- Computer Support Specialist
- Database Administrator
- Information Technology Analyst
- Information Technology Leadership
- Information Security Specialist
- Software/Application Developer
- Web Developer
- Technology sales consultant

Learning Objectives

- Efficiently generate customized forms for rapid deployment on SharePoint.
- Incorporate interactive elements into intricate forms without the need for coding.

- Enhance form functionality by implementing Quick Rules for added intelligence.
- Design and customize SharePoint list forms in InfoPath to match specific requirements.
- Effectively gather external data and seamlessly convert Office forms into InfoPath.

Course Outline

- **Day 01**

Module 1: Introduction to InfoPath

Leveraging InfoPath forms in your organization

- Defining the benefits and functionality
- InfoPath Designer
- Forms Services
- InfoPath Filler

Centralizing data collection for business processes

- Replacing disparate forms throughout your organization
- Exploring SharePoint lists and libraries
- Submitting results to SharePoint

Module 2: Designing InfoPath Forms

Customizing form templates

- Extending templates to meet business requirements

- Adding input controls to enhance the user experience
- Setting default values in fields or controls

Creating new forms from scratch

- Defining page layout with tables
- Building user-friendly forms
- Applying a consistent look and feel
- Adding repeating tables for many values

• Day 02

Module 3: Enabling Dynamic Form Interaction

Verifying user input based on business rules

- Configuring control properties
- Applying Quick Rules for easy validation without code
- Validating fields with range, required and format conditions

Conditionally formatting fields

- Changing background colors or fonts
- Hiding form sections in response to user actions
- Building robust cascading drop-down lists
- Executing a query from an action rule

Defining form actions

- Dynamically setting the value of a field
- Querying and submitting data
- Loading data with a Change Action
- Setting field properties to read-only

Module 4: Accessing External Information

Retrieving data from multiple sources

- Integrating data with the Data Connection Wizard
- Connecting to data sources and SharePoint lists
- Populating a control with SQL Server Data

Creating a user interface for business data

- Modifying information inside an InfoPath form
- Submitting changes to the data source
- Loading a repeating table with data

• Day 03

Module 5: Publishing Forms to SharePoint

Replacing default SharePoint forms

- Submitting to a document library
- Substituting a list default form with an InfoPath form
- Sending a form to SharePoint as a content type

Assessing deployment options

- Promoting items to a form library to extend reporting
- Utilizing administrator-approved templates for complex forms containing custom code

Deploying InfoPath forms

- Replacing SharePoint lists with InfoPath forms
- Making new form libraries with form templates
- Creating content types based on forms
- Adding Web Parts to a page to display forms

Module 6: Enhancing Business Processes with Workflow

Initiating workflow actions

- Building a form to trigger a workflow
- Adding a workflow to a form library

Integrating e-mail and tasks

- Coordinating and delegating tasks to information workers
- Embedding the People Picker into forms

Establishing conditional rules

- Directing workflow actions with form fields
- Generating task assignments based on form data

Confirmed Sessions

FROM	TO	DURATION	FEES	LOCATION
Dec. 15, 2025	Dec. 19, 2025	5 days	4250.00 \$	UAE - Dubai