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Module One: Getting Started

Welcome to the Microsoft InfoPath 2010 Essentials workshop. In this workshop, you will learn how to create, manage, and fill out interactive forms. The Microsoft InfoPath 2010 has new great features, such as the Office Fluent UI, and the ability to customize Sharepoint list forms in just one click. Are you ready to take your organization to the next level with Microsoft InfoPath 2010?
**Workshop Objectives**

Research has consistently demonstrated that when clear goals are associated with learning, it occurs more easily and rapidly.

By the end of this workshop, participants will be able to:

- Open and close InfoPath
- Use InfoPath’s Available Form Templates window and the interface
- Add rules to customized forms
- Explain XML at a high level
- Use InfoPath Filler 2010 to fill out forms
- Design a form from scratch using Microsoft InfoPath Design 2010
- Work with InfoPath tables
- Create field labels
- Add and modify basic controls, including picture and file attachments
- Understand what advanced control types can be used for
- Format controls
- Add data validation and conditional formatting rules to controls
- Use the Logic Inspector and Design Checker
- View and modify data sources, fields, and groups
- Manually bind controls to a data source
- Create, modify, and delete InfoPath views
- Change the color scheme of a form
- Check spelling
- Preview and test a form
- Protect a form
- Publish or print a form
Module Two: Opening and Closing InfoPath

In this module, you will learn how to open and close InfoPath. In addition, you will explore the InfoPath’s interface, the language used to build its forms, and the two modes that you can work in.

“Knowing is not enough; we must apply. Willing is not enough; we must do”.

Johann Wolfgang von Goethe
Opening InfoPath

Let’s begin. First, click the Start button (or the Windows logo) in the bottom left-hand corner of your screen. Then click “All Programs”.
Next, click the program group Microsoft Office, and then from the submenu, choose Microsoft Office InfoPath Designer 2010. This is the same as Microsoft InfoPath 2010.

Once you click on the icon for Microsoft Office InfoPath, it will open. Let's take a closer look at it.
Using the Available Form Templates Window

When you open InfoPath, you will see an available form templates window. On the left hand side, you will see a list of tasks that you can perform, including opening forms on your computer, designing a new form, and looking for recent forms that you have already created.

In the center, which is the white area, you can choose many different templates to design your form. You will notice that the available form templates are broken into three categories, which are: (a) popular form templates; (b) advanced form templates; and (c) InfoPath 2010 Form Templates.

Finally, click the icon on the right-hand side (Design This Form) to start performing that task on the selected form.
When you open InfoPath, you will see an available form template window:

On the left hand side, you will see a list of tasks that you can perform, including opening forms on your computer, designing a new form, and looking for recent forms that you have already created.

In the center, which is the white area, you can choose many different templates to design your form. You will notice that the available form templates are broken into three categories, which are: (a) popular form templates; (b) advanced form templates; and (c) InfoPath 2010 Form Templates.

Finally, click the icon on the right-hand side (Design This Form) to start performing that task on the selected form.
Exploring the InfoPath’s Interface

InfoPath’s interface will be slightly different depending on which mode you are in. Below is a screenshot of a form in Microsoft InfoPath Design 2010.

Here is a brief description of each part:

- **Title Bar:** At the top of the InfoPath window, you’ll see the name of the form you are working on and the program you are in (Microsoft InfoPath Design). At the far right of this bar, you have tools to minimize, maximize, or close the window.

- **Menu Bar:** This is one way that you can interact with InfoPath. Click on each word to see a group of commands. Then, click the command that you want.

- **Toolbars:** These bars provide another way to interact with InfoPath—simply click an icon to perform an action. Here, you can see the Standard, Formatting, and Tables toolbars (from top to bottom).

- **Working Area:** This is where you design your current form and make any changes, if necessary.

- **Task pane (Design Tasks):** This pane will provide key tools for designing forms.

- **Status bar:** Provides important information about your form and InfoPath.
When you have finished designing your form, other users will open the form in Microsoft InfoPath Filler 2010. This allows users to enter information into the form, but do not afford users to change the form’s design. In other words, users are only able to enter information into the forms.

As you can see, the interface is almost the same. However, the menu commands will be different, and the Design Tasks task pane will be unavailable.
An XML Primer

InfoPath uses Extensible Markup Language, also known as XML, to build its forms. InfoPath 2010 is very user-friendly and does not require knowledge of XML to use it. However, knowing what XML is and the basics of how it works can help you work with InfoPath.

XML is used to structure data in such a way that almost any operating system or computer program can interpret it. It does this by identifying data with tags.

Here is a brief example of XML.

```
<CATALOG>
  <CD>
    <TITLE> Greatest Hits </TITLE>
    <ARTIST> Max Swims </ARTIST>
    <YEAR> 1987 </YEAR>
  </CD>
  <CD>
    <TITLE> Big Band Breakdown </TITLE>
    <ARTIST> The Winners </ARTIST>
    <YEAR> 2005 </YEAR>
  </CD>
  <BOOK>
    <TITLE> Max and Julie Go To the Zoo </TITLE>
    <AUTHOR> Nancy Fellows </AUTHOR>
    <PUBLISHER> Great Books Inc. </PUBLISHER>
    <YEAR> 1964 </YEAR>
  </BOOK>
  <BOOK>
    <TITLE> Super Mysteries of the Sea </TITLE>
    <AUTHOR> Eugene Gilfoy </AUTHOR>
    <PUBLISHER> Waterproof Books Ltd. </PUBLISHER>
    <YEAR> 1995 </YEAR>
</CATALOG>
```

This structure allows us to see that this is a multimedia catalog with two books and two CDs. It is also easy to see what each line represents.

The important thing to remember is that although there are some general rules for marking up data with XML, the tags themselves are user defined. This means that you may look at several different XML files and not see the same tags in any of them.
Closing InfoPath

To close InfoPath, click File—Exit, or click the red X in the top right hand corner.

You will be prompted to save any changes that you have made to the open form.
Module Three: Using the InfoPath Filler 2010

In this module, we are going to look at Microsoft InfoPath Filler 2010. This will include filling out data, checking your spelling, saving the form, and printing the form.

Quick Tip: If you’re missing your design tools, you’re probably in Microsoft InfoPath Filler 2010.
Launching Microsoft InfoPath Filler 2010

Microsoft InfoPath Filler 2010 is what your users will use to complete forms. As we mentioned in the last topic, the interface looks the same, but provides different commands that are focused on data entry and validation rather than form creation.

To open a form in Microsoft InfoPath Filler 2010, click the “On My Computer” link from the Available Forms window.
Now, browse to select the form that you need to complete.
The form will now open in Fill-Out-A-Form mode.

Once you open the form, it will automatically allow you to fill in the form. The only thing left for you to do is click on the blank that you would like to complete with information.
**Entering Data**

The way that you will enter data depends on how the form has been designed. Controls include:

- Text boxes (with or without validation rules)
- Automatically calculated fields
- Date pickers
- Drop-down menus
- Repeating controls
- File attachments
There are several different ways to enter data in an InfoPath form. The way that you will enter data depends on how the form has been designed.

One of the simplest form controls is the text box. This control allows you to type text in the provided area. This is how we have entered data in the blank boxes and Additional Comments fields.

Please note that with some text fields, the formatting options on the Formatting toolbar will become available.

You can use these commands just as you would use the tools in a word processor.

Some fields will have rules applied to them that will format the data you enter, or check to make sure it matches a particular format.
You may also see controls that will help you enter data. For example, if we click the calendar icon in the Date field, we will see a calendar that we can use to choose a date. (If you have ever used Microsoft Outlook, this type of calendar may seem familiar.)
Checking Your Spelling

Like most word processors, InfoPath features a spell checker. To start the spell checker, click the Spelling command on the Standard toolbar.

You can also click Tools – Spelling – Spelling or use the F7 shortcut.

Then, the Spelling task pane will open with the first incorrect word underlined.

You will have options to add the word to the dictionary, ignore it, change it to InfoPath’s suggested choice, change all instances, or to go to the next word.
Once you have resolved all words identified as incorrect, the spelling check will be complete.

InfoPath’s spell check is not perfect, and it does not include contextual spell check like other Microsoft Office programs. Always proofread your form!
Printing the Form

To print a hard copy of a form, click the File menu and click Print, or use the Ctrl + P shortcut.

This will open the Print dialog, where you can choose the printer, print range, and number of copies.
When you are ready, click OK to print the form. You can also send the form directly to the printer with the default settings by clicking the Quick Print icon on the Standard toolbar.
Saving the Form

Typically, when you are finished with a form, you will submit it electronically. However, you can also save it so that you can come back and work on it later.

To save a form, click File – Save. (You can also use the Save command on the Standard toolbar or the Ctrl + S shortcut. If you have already saved a form and want to change its name or location, use the File – Save As command or the F12 shortcut.)
Now we will choose a location, name, and type for the form.
Once the form has been saved, we can see the change in the title bar.
If you want to save the form as a screenshot, you would need to find the Print Screen (Prt Scr) button, and press it. Next, you can paste the screenshot in a document or wherever you desire.