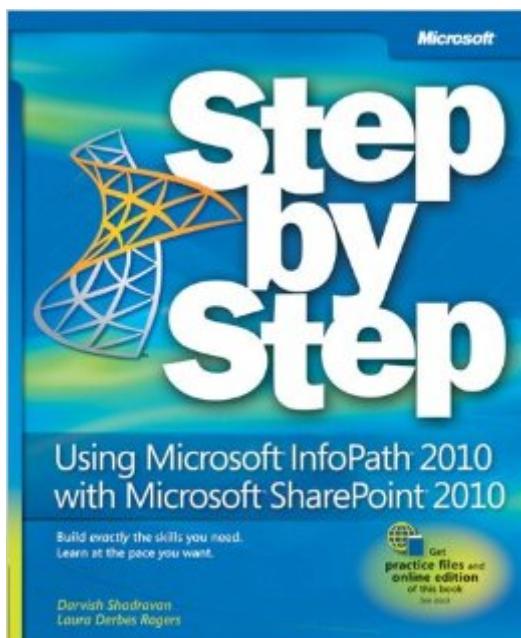


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# Using Microsoft InfoPath 2010 With Microsoft SharePoint 2010 Step By Step



## **Synopsis**

The smart way to learn how to build InfoPath forms for SharePointâ "one step at a time! Quickly teach yourself how to use Microsoft InfoPath 2010 to create electronic business forms for Microsoft SharePoint 2010. With Step by Step, you set the paceâ "building and practicing the skills you need, just when you need them! Design and build InfoPath forms without writing code Add approval workflows to your InfoPath forms Integrate data from SharePoint and other company systems Create forms that offer a rich experience in the browser Build views and dashboards to display form information Create and use forms in the cloud with SharePoint Online

## **Book Information**

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## **Customer Reviews**

Combining Infopath and Sharepoint was my goal and this book taught me how to do that in a fast track way. I could not believe that I went cover to cover in a short amount of time and learned so much! Now it will be a great reference book! I had a small question and Laura Rodgers answered it via Twitter. I now will be following her for sure!

I have followed Laura Rogers and Darvish Shadravan for a while now and have always enjoyed seeing them speak at various conferences and events. So, when a client approached me with this book wanting to know if they should buy it, I told them yes without hesitation or having even read it. After flipping through the first few chapters I just knew that I had to buy a copy for myself as well.

Laura and Darvish have written an excellent book focused around using InfoPath 2010 with SharePoint 2010, something that has been needed for some time in my opinion. I really liked the layout and the approach the authors chose for conveying the information. It is divided into 14 chapters which start with the basics and slowly ramps the reader up into more advanced topics. The explanations and pace of the book is excellent. At no time when I read the book did I feel as if they took me down a path of learning and then left me hanging while they went on to another topic. There is a nice mixture between text and exercises within the book. While this book could be used a go to for information when needed, I would suggest going through the entire book cover to cover first. Laura and Darvish have explained everything very well. But you have to remember that the book chapters do build upon each other. So if you were to flip through the book looking for something you will most likely find it but if you don't have a background in InfoPath or SharePoint you may just miss a an important concept that they wrote in an earlier section. As I wrote earlier this is a great book with a lot of good information on using InfoPath 2010 with SharePoint 2010. It reads very easily and if you have a free weekend with access to a SharePoint 2010 site and InfoPath 2010 installed you will probably be able to work through the reading and the exercises pretty easily. That said however do not get me wrong and think that this is a basic book. Laura and Darvish do go into the more complex areas of using the software as well. Such as adding logic and rules, integrating with SharePoint workflows, InfoPath Forms Services, Dashboards, and advanced functions. So this is not a lightweight book. It's their easy writing style (almost as if they were sitting next to you talking you through the content) which makes it such a good resource.

**Chapter Highlights:**

- Chapter 1 - Office Backstage in InfoPath**, Understand how to create an XML file, Create an InfoPath form, Add, data connections to a form.
- Chapter 2 - Choosing a form template**, Understanding form compatibility levels, learn what the document information panel is (--did you know that you can customize this?), run the Design Checker.
- Chapter 3 - Use Page Layout templates**, add tables to forms, understand data binding, work with InfoPath Controls.
- Chapter 4 - Insert a custom page design template**, use available controls for a form, customize a travel request list using InfoPath, use calculations in a form.
- Chapter 5 - Work with the InfoPath Rules Task Pane**, add conditions to Rules, Using Rules with Picture Buttons, Create Forms with Wizard-style interfaces.
- Chapter 6 - Create a time off request form**, set up Submit button actions, Concatenate field names to create a file name, publish a form as a content type.
- Chapter 7 - Add a SharePoint list data connection to a drop down control**, work with Data Connection Libraries, Use the External Item Picker control.
- Chapter 8 - Create a simple feedback form**, configure the InfoPath Form Web Part, learn about Web Part connections, create an input parameter.
- Chapter 9 - Add data from a web service to your forms**, Work with form

load rules, create an event registration form. Chapter 10 - Integrate InfoPath forms in workflows, customize an initiation form to look more polished, update forms when fields change, use task actions in workflows to generate a task form in the workflow. Chapter 11 - Create a time off request form, create an approval section on the approvals view, create a SharePoint Designer workflow to send emails, create multiple rules on a single submit button. Chapter 12 - Understand InfoPath Form Services in SharePoint Central Admin, Learn how to use Fiddler to monitor browser forms, analyze the effects of attachments on form performance. Chapter 13 - Work with custom views, learn to apply conditional formatting to views, add buttons to SharePoint pages for creating new forms, add Key Performance Indicators that report metrics from your forms, utilize the Content Query Web Part to surface information. Chapter 14 - Utilize the Rule Inspector to analyze all rules inside a form, learn how to modify the toolbar, create multiple default values in a form, work with the Translate function to manipulate text in case-sensitive form fields.

I have always enjoyed reading Laura Rogers blog and her tutorials so I was excited to see that she worked on this book. It is the main reason that I purchased the book. The steps are simple and easy to follow. I was most interested in the custom workflows and I was glad to see a chapter dedicated to setting up these workflows in SP Designer. I am working on a few custom InfoPath forms and workflows which the book has helped me tremendously. The book also comes with a digital version so I am able to do quick searches to find what I need.

This is one of the best SharePoint books that I have read. I love the idea of InfoPath and have used the 2007 version with varying degrees of success. Even with some familiarity with InfoPath 2010, I learned something new in every chapter. The tone is very conversational, where it feels like the authors are sitting next to you walking you through the exercises. I never felt this book about technology got too "techy" and I would recommend this for end users, power users and developers alike (why code if you can use an out of the box InfoPath feature). The print screens are excellent and really enable you to fully grasp the concepts, I read the book without a computer or InfoPath in front of me and was able to follow each exercise and feel like I understood it. Laura and Darvish do an excellent job of telling you what you can do, WHY you should do it, and give you different options on how. There is also commentary about what worked in their testing and what didn't...they don't tell you it won't work, just that the way they did this or that did not work very well and give recommendations on alternate ways. The fact that a chapter is dedicated to basic workflow is awesome...any user, new or experienced, will have the knowledge to not only build a form, but a

usable solution. And I love the advanced topics at the end. It is a mix-up of useful information about a variety of topics that show these authors really want to empower users with knowledge to help them succeed. I feel very strongly that even experienced SharePoint users will learn a lot from this book. I also recommend reading Johnathan Lightfoot's review about this book, it is right on the money. I don't need to repeat what he has already said, but I completely agree with him.

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