



# O-13 - InfoPath 2010 - Det papirløse kontor

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# Formål

- Formålet med denne session er at...
  - Give en introduktion til nyhederne i den nye InfoPath 2010
  - Vise disse nyheder vha. demo af nye features

# Hvem er jeg

- Globeteam, Virum
- 10 teams
  - Office/Microsoft
  - OCS Exchange
  - ITSM
  - Client
  - Management Consulting
  - EPM/Projektledelse
  - BPM
  - Infrastruktur
  - Developer
  - SOA
- Unik organisation
- Teamleder for Office/SharePoint-teamet



# Agenda

- Introduktion
- InfoPath 2010
- Demo 1
  - Simpelt form-design
- Demo 2
  - Avanceret form-applikation med kode og workflow
- Spørgsmål

# Customer Challenges with Business Forms

- Inefficient information gathering
  - Rekeying information is inefficient and increases chance of error
  - Paper-based forms increase chance of error
  - Submitting multiple forms for a single process
- Disconnected business processes
  - Version management of form templates
  - Business process “islands” that don’t integrate
  - Converting printable Microsoft Office Word templates to functional electronic forms
- Cumbersome forms “solutions”
  - “One size fits all” solutions are inflexible
  - Buying multiple products and making them all work is unwieldy
  - Upgrading software may have a negative impact on participants
  - Per-form pricing imposes a “tax” on business processes

# Common Forms

## Human Resources

- Benefits changes
- Awards and recognitions
- Job descriptions

## Accounting

- Check requests
- Time sheets
- Expense reports and reimbursements
- Chargebacks
- Purchase orders
- Billing statements
- Charitable gift-match requests
- Payroll
- Sales tracking
- Customer billing

## Sales/Services

- Order forms
- Call tracking
- Demo requests
- Service requests

## Marketing

- Leads
- Information requests
- Press requests
- Event registration
- Customer visit reports

## R&D/Manufacturing

- Engineering change requests
- Accident report
- Quality control
- Supplier inventory tracking
- Product evaluations

## Information Technology

- Chargebacks
- Equipment receipt/signoff
- RFPs

## General Services

- Work orders
- Office moves
- Shipping forms

## Vertical-specific

### Financial services

- Loan applications
- Insurance claims processing
- Bank account transfer

### Medical

- Patient diagnostics
- Medical drug interactions
- Medical history

### Government

- Permits and licensing
- Tax returns
- Passport and visa applications
- Address change

### Pharmaceutical

- FDA clinical drug trial tracking

### Education

- Class registrations
- Admissions and financial aid applications

### Police

- Arrest report
- Accident reports/history

# What is InfoPath?



## Form Designer & Filler

- Browser and Client forms with form logic & data connectivity



## Forms for SharePoint

- Lists, External Lists, Form Libraries & Workflow forms

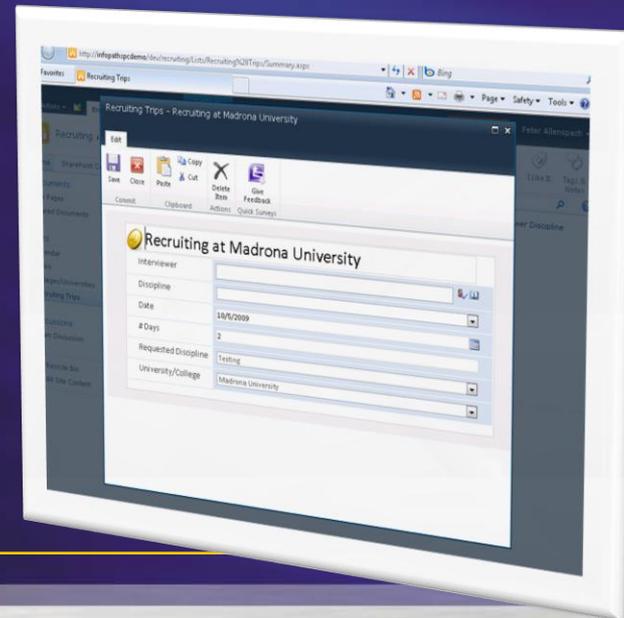
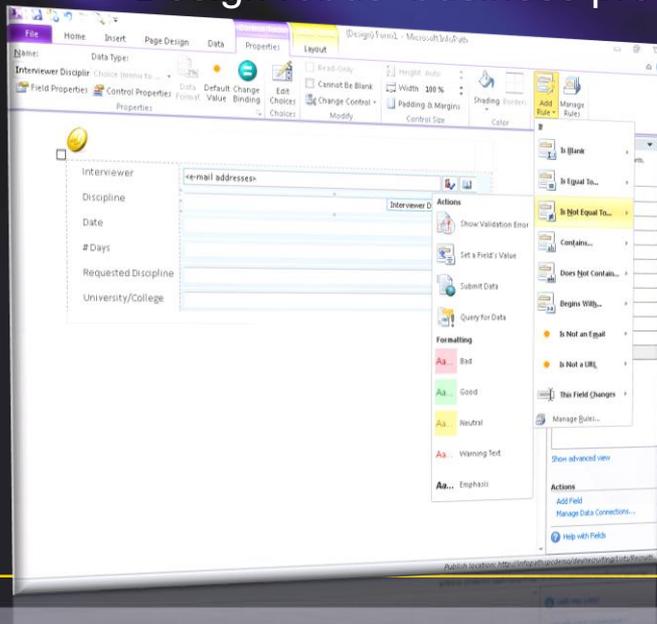


## Forms integrated into Office

- SharePoint Workspace, Outlook, Word, PowerPoint, Excel

# Introducing InfoPath 2010

- InfoPath 2010 is a powerful, yet easy-to-use tool that helps quickly collect information from the people who matter most to the business.
  - Improve business process efficiency with easy to design forms
  - Extend the reach of the forms with easily designed ad-hoc business solutions
  - Design robust business process Composite Applications using forms



# What is InfoPath?



Microsoft®  
**InfoPath® 2010**

Form Designer & Filler

- Browser and Client forms



Visual Layout



Form Logic



Data Connection

# InfoPath Forms Integration in SharePoint Server

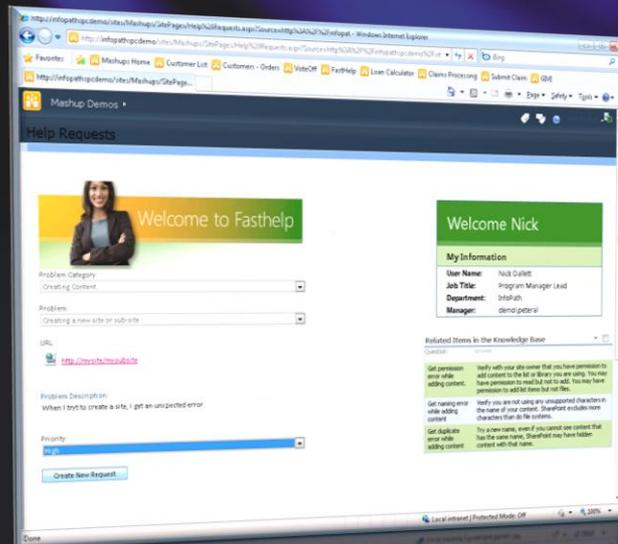
Site Templates and WebParts

ASP.NET Control

InfoPath Forms Services (intranet and FIS)

Server management (health monitoring and PowerShell) and Secure Store

Publish forms with managed code as part of a Sandboxed SharePoint solution



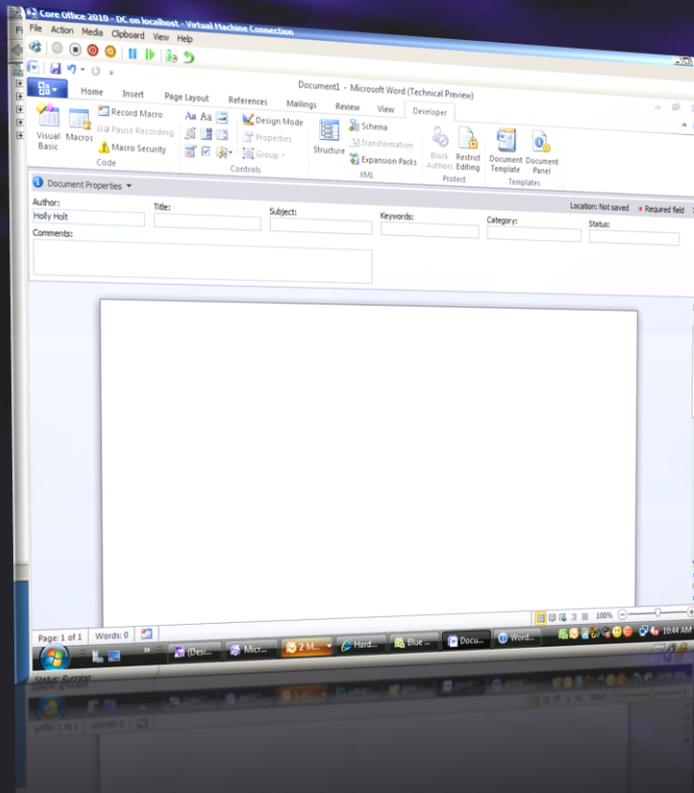
# InfoPath Forms Distribution via Office Client

Outlook

Document  
Property Pane

InfoPath Filler

SharePoint  
WorkSpace



# What is new in InfoPath 2010

## Improve Business Process Efficiency with Easy to Design Forms

- Fluent™ user interface
- Rules management and quick rules
- Form layout sections
- Themes and styles
- InfoPath Filler Mode

## Extend the Reach of the Forms with Ad-hoc Business Solutions

- SharePoint Workspace integration
- Automatically generate forms based on lists (regular and external via BCS)
- Improved parity between Client and Web forms (controls available in both: bulleted, numbered and plain lists, multiple selection list box, combo box, picture buttons, hyperlink, choice group, and filtering functionality).
- Integration with SharePoint-enabled workflows, server side management (monitoring and PowerShell)
- Web Forms are WCAG 2.0 AA Compliant

## Design Robust Business Process Composite Applications Using Forms

- Integration with Business Connectivity Services
- One-click publishing
- Packaging of forms solutions in SharePoint Solution (WSP) and Site Template (STP) formats
- Easily create interconnected forms (order/order detail) in the browser forms
- Support the CNG (Cryptography Next Generation) API and digital signatures for both full and partial forms
- Publish forms with managed code as part of a Sandboxed SharePoint solution
- Support for getting XML data from REST Web services

# InfoPath 2010 Licensing

## InfoPath Designer

- Office 2010 ProPlus
- Academic SKU

## InfoPath Forms Services

- Enterprise CAL required
- No longer offered as a separate purchase

# InfoPath 2010 Demo

# Takeaways

- InfoPath 2010 is a “v 3.0” product, new and improved features go a long way to empower Information Workers and Developers to effectively capture information:
  - Improve business process efficiency with easy to design forms
  - Extend the reach of the forms with easily designed ad-hoc business solutions
  - Design robust business process Composite Applications using forms
- Tight integration with SharePoint 2010 allows to extend InfoPath solutions with **business workflows, integration with LOB data** via BCS and **robust management and deployment** of the solutions.

# Resources

- InfoPath homepage: <http://office.microsoft.com/en-us/infopath/default.aspx>
- InfoPath Engineering blog: <http://blogs.msdn.com/infopath/>
- InfoPath on MSDN <http://msdn.microsoft.com/en-us/office/aa905443.aspx>
- Steen Molberg, Globeteam – [stm@globeteam.com](mailto:stm@globeteam.com)

Questions?