

SharePoint 2007: Business Processes

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Meet the expert: Doug Ware is a SharePoint expert and an instructor for many of our SharePoint 2007 and SharePoint 2010 courses. A Microsoft MVP several times over, Doug is the leader of the Atlanta .NET User Group, one of the largest user groups in the Southeast U.S., and is a frequent speaker at code camps and other events. In addition to teaching and writing about SharePoint, Doug stays active as a consultant and has helped numerous organizations implement and customize SharePoint.

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Course description: Microsoft Office SharePoint Server 2007 provides a wealth of services that you can use, customize, and extend to augment and streamline your business processes. This course covers these features and teaches you how to build on them to create business solutions. The beginning of the course orients you with the built-in capabilities and teaches how to customize them using SharePoint Designer. From there you will learn how to create custom forms using both ASP.NET and InfoPath. The last half of the course teaches how to build custom workflows in SharePoint using Visual Studio and covers sequential workflows, state machines, tasks, and custom workflow forms using both ASP.NET and InfoPath.

Course outline:

Understanding PBA

- Introduction
- Business Process Automation
- Management by Excel
- Management by SharePoint
- Demo: SP Management
- Using Lists
- Task List
- Issue List
- Project Task List
- Modifying Lists
- Alternate Views
- Integration to Outlook
- Lists and Views in Code
- Demo: Tasks List
- Demo: Issues List
- Demo: Project Task List
- Summary

Modifying Lists

- Introduction
- Demo: Modify Project List
- Demo: Create New Item
- Demo: Reorder Columns
- Demo: Modify Items Displayed
- Demo: Gantt View
- Demo: Grouping and Totaling
- Demo: Calendar View
- Demo: Calendar in Outlook
- Demo: Lists & Views in VS

- Demo: List Provisioner
- Summary

Alerts and RSS

- Introduction
- Creating and Using Alerts
- Alerts for Others
- Central Management of Alerts
- Demo: Alerts
- RSS
- Demo: RSS
- Open Source
- Demo: Task Mover
- Summary

Out Of Box Workflows

- Introduction
- Out of the Box Workflows
- Approval
- Three State Approval
- Collect Feedback
- Collect Signatures
- Disposition Approval
- Modify Running Workflows
- Workflow History
- Demo: Built-In Workflows
- Summary

WorkFlow and SharePoint

- Introduction
- Overview
- Windows Workflow Foundation
- Designer Overview
- Sites vs. Web Sites

- Designer Workflows
- Tools and Environment
- Demo: SharePoint Designer
- Summary

Steps, Conditions, Actions

- Introduction
- SPD Workflows
- Defining Steps
- Actions
- Conditions
- Rules
- Parallel vs. Serial Actions
- Steps
- Demo: Steps, Conditions...
- Summary

Workflow Forms and Variables

- Introduction
- Creating Workflow Forms
- Workflow Initiation Form
- Workflow Task Forms
- Custom Task Form
- Creating & Using Variables
- Demo: Custom Forms & Vars
- Demo: Testing Contracts
- Summary

Extending SP Designer

- Introduction
- Custom Activities
- Activities in Visual Studio
- Deployment
- Config Requirements

- Demo: Custom Activity
- Summary

Customizing List Forms

- Introduction
- List Forms
- Customizing List Forms
- Demo: List Forms
- Upgrade Considerations
- Resetting to Site Definition
- Custom List Forms
- Demo: Custom List Form
- Summary

Creating Applications with SPD

- Introduction
- Creating Applications
- Data View Web Parts
- Demo: Data View App
- Application Templates
- Demo: Templates
- Summary

Custom ASP.NET Pages

- Introduction
- ASP.NET Forms & Controls
- Application pages
- Site Pages
- Demo: Code to Create Pages
- Summary

InfoPath Forms

- Introduction
- Creating InfoPath Forms
- InfoPath Client Modes
- Form Templates

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- Data In Forms
- Controls & Template Parts
- Demo: InfoPath Form
- Summary

Form Libraries

- Introduction
- Overview
- InfoPath Forms Services
- Data Connection Libraries
- Demo: Data Connection
- Form Publishing Options
- Demo: Template Options
- Summary

InfoPath Forms in Office

- Introduction
- Forms In Outlook
- Document Info Panels
- Demo: Form in Outlook
- Demo: Doc Info Panels
- Summary

Workflow Association

- Introduction
- SP as a Workflow Platform
- Uses and Capabilities
- Basic Collaboration Items
- SP & Workflow Foundation
- Two Types of Workflows
- User Interface Options
- Templates, Associations...
- Creating Templates with VS
- Workflow Designer
- Demo: Workflow Template
- Workflow Associations
- Association Objects
- Demo: Association
- Summary

Workflow Initiation

- Introduction
- Starting a Workflow Instance
- Workflow Initiation Objects
- Demo: Start a Workflow
- Collecting Data
- Association & Initiation Data
- Demo: Association & Initiation
- Their Importance via Code
- Demo: Configure Workflows
- Summary

Sequential Workflows

- Introduction
- Build Workflows
- Code-based Workflow Elmnts
- Bind Properties to Activities
- Flow of Control
- Rules and Conditions

- Sequential Workflows
- Demo: Sequential Workflow
- Summary

State Machine Workflows

- Introduction
- Overview
- State Machine Workflow
- Demo: Testing the Workflow
- Summary

Faults and Activities

- Introduction
- Faults & Canceled Workflows
- Handling Workflow Exceptions
- Handling Canceled Workflows
- Demo: Fault Handler
- Custom Activities
- Demo: Custom Activity
- Summary

Tasks

- Introduction
- Task Basics
- Typical Flow
- Task Activities
- Demo: Tasks
- Connecting Related Tasks
- Correlation Service
- SP Host Pros & Cons
- Appropriate Token
- Setting OwnerActivityName
- Demo: OwnerActivityName
- Summary

More On Tasks

- Introduction
- Tasks in State Machine
- State Machine Workflow
- Demo: Testing the Workflow
- Handling Multiple Tasks
- Summary

Custom Tasks

- Introduction
- Custom Task Types
- Content Types
- Workflow Task Content Type
- Demo: Custom Tasks
- Default Task Type
- With Content Type Activity
- Type & Field Definitions
- Task Properties
- Reading & Writing Values
- Demo: Content Type Activity
- Summary

Workflow Forms

- Introduction
- Form Basics
- Four Types of Forms

- InfoPath and ASP.NET
- InfoPath Workflow Forms
- ASP.NET Workflow Forms
- XML Serialization - InfoPath
- XML Serialization - ASP.NET
- Association Forms
- InfoPath Feature XML
- ASP.NET Feature XML
- Demo: Association Form
- Summary

Initiation and Task Forms

- Introduction
- Initiation Forms
- InfoPath Feature XML
- ASP.NET Feature XML
- Demo: ASP Initiation Form
- Task Forms
- Element Manifest
- Task Properties
- Demo: InfoPath Task Form
- Summary

Modification Forms

- Introduction
- Modification
- Element Manifest
- Demo: Modification Form
- Demo: Testing the Form
- Summary