

SharePoint Designer and Workflows (2 days)

Course Overview

- In this course you will learn how to: Build custom SharePoint business solutions with SharePoint Designer 2013
- Leverage SharePoint Designer 2013 features to extend SharePoint sites
- Displaying data from SharePoint lists and integrate data from multiple sources
- Automate complex business processes with SharePoint workflows
- Create forms and capture data for workflows and data storage
- Presenting data for business intelligence

Target Audience

Anyone responsible for creating, building or managing SharePoint 2013 sites. Basic knowledge of SharePoint site structure or experience with a previous version of SharePoint is assumed.

Topics

SharePoint 2013 Introduction

- Introduction to SharePoint technologies
- Comparing and contrasting SharePoint Foundation with SharePoint Server
- Exploring Web applications and site collections
- Setting SharePoint Designer restrictions and Central Administration
- Developing a business case study
- Leveraging Web Parts, lists and libraries
- Setting standards with site templates

Customising Web Sites with SharePoint Designer 2013

- Exploring new features in SharePoint Designer 2013
- Creating and SharePoint sites using SharePoint Designer
- Creating Web Pages
- Navigating through the site with the Ribbon interface
- Managing Lists and Libraries
- Working with content types
- Modifying SharePoint sites
- Creating Content Types

Displaying Information with Data Views

- Creating data views
- Displaying list data using the Data View Web Part
- Linking and merging data sources

Connecting to External Data Sources

- Working with relational data
- Leveraging SQL Server data
- Displaying Database Results
- Retrieving data via stored procedures and views
- Business Connectivity Services (BCS)
- Utilising external content types
- Centralising security through BCS

Automating Business Processes with Workflows

- Analysing business requirements
- Establishing business rules through branching logic
- Executing workflows in parallel and serial
- Identifying lists required in the workflow process
- Assigning tasks to participants
- Building workflows
- Creating workflow actions and steps
- Sequential Workflows
- Parallel Workflows
- Cascading Workflows
- Reusable Workflows
- InfoPath forms and Workflows

Presenting Data for Business Intelligence

- SQL server Reporting Services and SharePoint integration
- Leveraging Report Builder to build reports
- Reporting Data from SharePoint Lists
- Report content types, Data Sources and Data Sets
- Leveraging SSRS in SharePoint for building dashboards