



Automating Business Processes in SharePoint 2007



Course Length
3 days

Course Level
Advanced

Automating Business Processes in SharePoint 2007

Automating Business Processes in SharePoint 2007 is an intensive, SharePoint expert-led, three day course designed for both IT professionals and business users, in medium to large enterprises that need automate their business processes using workflows in both SharePoint 2007 and InfoPath 2007. The course will explore how to create linear, multi-branched or state driven workflows using SharePoint Designer 2007 and InfoPath 2007.

The course has significant hands-on labs that demonstrate to each student, through annotated step-by-step instructional screenshots, how to design, create and use workflows in SharePoint 2007. Business process automations covered in the 20+ labs include expense reporting, equipment purchase authorizations, project status reporting, asset tracking management, travel requests and automating document approvals.

Target Audience

Any IT professional, business user or end user tasked with the creation of advanced workflows for their company's business processes.

Prerequisites

SharePoint Designer 2007 is recommended but is not required. Prior experience with SharePoint 2007 is recommended. Students should also be familiar with business processes and business forms, in both paper and electronic form. There is no coding or development in this course.

At the end of this course the student will be able to ...

- Have a solid understanding of how to automate processes in SharePoint 2007 using both Office 2007 and InfoPath 2007
- Be able to implement over 15 business processes
- Have a solid understanding of InfoPath 2007's capabilities
- Have a detailed understanding of how to create business forms to collect data
- Know how to take advantage of SharePoint 2007 for approval processes
- Be able to understand how to customize and tailor business processes for detailed workflows

Course Syllabus

Module 1: What is Business Process Automation?

This module teaches some basic course terms and will define business process automation.

- Portal structural components
- Site Templates
- Enterprise site templates
- Team site templates
- Portal Taxonomy
- Portal site 'wire-framing' design
- Manage Portal content and structure
- Portal structure and design using best practices

Module 2: Creating business forms with SharePoint 2007 & MS Office 2007

This module teaches how business information was traditionally collected using Word, Excel or SharePoint forms. Through real examples, usage key shortcomings will be exposed and discussed setting the groundwork for improvement in future modules.

- Discuss various form usages
- How Word & Excel Forms are used
- How SharePoint list forms can be utilized
- Demo: expense in Excel, fax form in Word, and Word site inspection

Module 3: Creating business forms with InfoPath

This module teaches how to create business forms using InfoPath. The student will learn about how to design form layouts using the appropriate controls to collect business data easily and efficiently.

- Form Templates
 - Form template dialog
 - Existing Out-of-the-box forms (Asset tracking, Expense report, Meeting agenda, Status report, Travel request)
 - Lab: Modify the Status report form
- Form layout design
 - Working with standard controls
 - Repeating and optional components
 - File and picture controls
 - Lab: Create an a new absence request form
 - Multiple form views
 - Control formatting
 - Editing default values
 - Lab: create a new multi-view equipment purchase authorization request.
- Form data binding
 - Automatic vs. manual creation of the form data source
 - Data source field and group properties
 - Lab: Create a form using an existing XML schema
 - Lab: Create and modify the data source for a purchase authorization form

Course Syllabus

Module 4: Creating smart interactive business forms with InfoPath

This module teaches the next step in creating advanced business forms to increase business productivity and efficiency. These smart interactive business forms can enforce the company business rules, automate data filling tasks and even standardize the process.

- Advanced controls
- Conditional formatting
- Control properties
- Connect to external XML data
- Connect to external database information
- Connect to SharePoint list data
- Connect to Web Services data
- Offline data caching
- Secondary data source bindings
- Field data validation
 - Using secondary data sources
 - Filtering lookup items
- Rules
- Logic Inspector
- Lab: Create a detailed asset tracking form with external lookups

Module 5: Store InfoPath business forms in SharePoint

This module teaches some key methods of saving the form data once the user fills the information in using SharePoint. The standard SharePoint method will be discussed along with several advanced methods that can extend the reach of the form filling experience using Forms Server.

- Promotion to a Form Library
 - Form library promotion
 - Form data field promotion (and demotion from SharePoint)
 - Offline data for secondary data sources
 - Form reporting and merging
 - Lab: Promote the Travel request form to a SharePoint library
- Forms Server
 - Design checker for SharePoint Forms Server
 - Promotion to content type
 - Lab: Promote Meeting Agenda form as a content type
 - Administrator only promotion process
 - Mobility support with Forms Server
 - Lab: Create and promote a Site Inspection form to SharePoint forms server via the administrator option

Course Syllabus

Module 6: Automate processes by submitting business form data

This module teaches several methods of easily automating common business processes by submitting and/or exchanging form data.

- Submit form data to SharePoint
 - Automate the submit process
 - Form server URL query string options
 - Lab: Expense report with promotion, merging and formatting
- Automate simple business actions with InfoPath & existing Web Services
 - Lab: Create a new site collection request form
- Using e-Mail in business processes
 - E-Mail enable SharePoint lists and libraries
 - Lab: Resume submission process
 - InfoPath and email (submit or save to)
 - The Outlook 2007 experience
 - Lab: Survey to attend golf tournament via std email & Outlook 2007 and expense report using Outlook 2007
- Automate business processes to existing database systems
 - Standard Database submission
 - Database Dataset submission
 - Lab: CRM integration, new prospect/opportunity process

Module 7: Security

This module teaches how to lock down and secure your business processes when utilizing SharePoint and Office 2007.

- InfoPath security levels
 - Full trust security level
 - Domain security level
 - Restricted security level
- Trust center and designer lockdown
- Forms server
 - Administrator only deployment
 - Management of Data connections
 - Lab: Deploy a form with managed external database connections

Module 8: Basic business process Workflows

This module teaches the basics and benefits that workflows provide business processes.

- Three state
 - Lab: Implement a three state workflow for a resume submission process
- Approval
 - Lab: Legal Document approval workflow
 - Lab: InfoPath travel request approval
- Signatures
 - Lab: Contract signatures collection workflow
- Collect feedback, Disposition, language translation (supplemental)

Course Syllabus

Module 9: Customized process workflows with SharePoint Designer

This module teaches the extensions possible for complex and customized business process workflows.

- Steps, actions and conditions
- The 9 Conditions in detail
- The 23 Actions in detail
- Work with the History list including usages for debugging
- Lab: Create an automatic workflow to copy an approved document to the public repository
- How to use workflow variables
- How do lookups work and how to correlate them to the workflow
- Workflow forms data entry
- Multiple workflows working together
- Lab: Create a student course sign-up process (requires multiple workflows)
- Lab: Create a multi-tiered capital expense approval workflow
- Custom actions and activities
- Lab: Integration with 3rd party application via custom action that writes to a database

Supplemental: Advanced InfoPath (Supplemental)

This reference module teaches some advanced features of InfoPath that can be utilized in your business processes.

- Capabilities of each versions of InfoPath
- InfoPath reporting and merging
 - Forms library merge
 - Merging forms and customizing merge behaviour
 - Printing: views, headers, footers and multiple views
 - Lab: Create custom merging & printing for a status report
- Template parts
 - Create template parts, using template parts
 - Lab: Create a re-usable address template part block
- User Roles
 - Creating user roles, using roles in actions, role based views
- Mobile support
 - Lab: View a Travel request form on a mobile device
- Importing and Exporting
 - Lab: import an Excel expense spreadsheet and a Word fax form