

Technical Training Solutions



SharePoint 2010 Workflows with SharePoint Designer 2010 (2 Day Course)

Technical
Course
Outline

Course Summary

This course is meant to introduce the power of workflows to automate document management and routing within a SharePoint environment. This course will begin by presenting the powerful functionality included as part of both SharePoint Foundation and SharePoint Server and configured via the browser interface. The course will then discuss creating custom workflows using SharePoint designer.

Intended Audience:

The audience for this course should be experienced SharePoint users. It is assumed that students taking this course will be familiar with creating Lists, Document Libraries and Content Types. The course will utilize the SharePoint 2010 user interface, SharePoint Designer 2010 and InfoPath 2010 but prior experience with these products is not necessary.

Prerequisites:

To ensure the best learning experience for all participants, the following pre-requisites *must be met* in order to participate in this course:

- Familiarity with the SharePoint 2010 browser interface
- Ability to create new Lists, Document Libraries, Views and Content Types

Course Contents:

Introduction to SharePoint 2010 Workflows

- What Is a Workflow?
- List, Reusable and Site Workflows
- Sequential vs. State Machine Workflows
- SharePoint 2010 Workflow Toolset
 - SharePoint 2010 UI Built-In Workflow Templates
 - SharePoint Designer 2010 Workflows
 - Visual Studio 2010 Workflows
 - Visio 2010
 - InfoPath 2010
- Workflow Task and History Lists
- Workflow Start Options
- Managing Workflows
 - In the SharePoint 2010 UI
 - In SharePoint Designer 2010

Building and Managing Workflows in the SharePoint 2010 UI (overview)

- Creating Workflows using the Native Templates
 - Three-state
 - Approval
 - Collect Feedback
 - Disposition
 - Collect Signatures
- Managing Workflow Settings
 - Task and History Lists
 - Start Options

Building and Managing Workflows in SharePoint Designer 2010

- Association Columns
- Initiation Parameters
 - Initiation Forms
- Local Variables
- Workflow Steps
 - Impersonation Step
 - The Task Process Designer
- Conditions
- Workflow Actions
 - Core
 - Document Set
 - List
 - Relational
 - Task
 - Utility
- Parallel Blocks
- Checking for Errors
- Publishing
- Managing Workflow Settings
 - Task and History Lists
 - Start Options
- Exporting Workflows as Packages

Visio Integration with SharePoint Workflows

- Modeling SharePoint Workflows using Visio 2010
- Exporting Visio Workflows for use In SharePoint 2010
- Importing Visio Workflows into SharePoint Designer 2010
- Exporting SharePoint Designer 2010 Workflows to Visio 2010
- Visualizing Workflows with Visio 2010 Premium

Customizing Workflow Forms with InfoPath 2010

- Understanding Workflow Form Types
 - Initiation Forms
 - Task Forms
 - Association Forms