



SharePoint for Business Process Automation

Code: 1077

3 days

Course Overview

In this course, you will learn how to use SharePoint 2013's robust automated business processes. This provides you with a deep dive into SharePoint automation ranging from working with documentation to managing records to full workflow processes and task tracking. Users who have some SharePoint knowledge will find this course perfect for learning and building on advanced SharePoint topics.

Who Needs To Attend

- Power users
- Site owners
- Content editors
- Information managers
- Site administrators
- Site collection administrators
- Project managers
- Team supervisors

Course Details

Topics Include

- Focus on the work that matters instead of the process of how the work gets done
- Develop organizational efficiency through automation of repetitive tasks
- Organize, manage, and handle content consistently across your business
- Easily track processes from beginning to end
- Simplify user discovery of important content
- Help enforce compliance with government and legal regulations or internal business processes
- Identify important information for record retention
- Focus on real-world user application

Course Outline

1. Working with Sites

- Definition of a Site - Why do we create new Sites?
- Site Components Revisited
- Site Templates Explained for Business Process Automation
- Site Settings and Features
- Creating Sites

2. SharePoint Lists

- What are Lists?
- Using Lists to Manage Business Processes Automation
- Available List Apps
- Creating Apps Using List templates
- Working with the Tasks List App
- Working with Issue Tracking
- Working with Key Performance Indicator (KPI) List
- Advanced List Topics
- Working with Views

3. SharePoint Libraries

- What are Libraries?
- Using Libraries to Manage Document Information Lifecycle in the Enterprise
- Library Architecture
- Available Library Apps
- Creating Apps Using Library templates
- Using Version Control
- Advanced Library Topics
- Working with Views

4. Content Types

- What are Content Types?

5. Enterprise Content Management

- Importance of ECM - What is ECM?
- Folders vs. Metadata
- Views and Metadata Navigation
- Default Column Values
- Information Management Policies
- In-Place Record Management
- File Plans
- Record Management
- Content Organizer
- Document ID Service
- Managed Metadata
- Managed Metadata Navigation

6. InfoPath Form Services

- What is InfoPath?

- Creating List-Based InfoPath Forms
- Working with Library-Based InfoPath Forms
- InfoPath Page Design, Layout, and Themes
- Using Tables for Advanced Layout
- InfoPath Fields and Form Controls
- Managing Rules
- Publishing InfoPath Forms
- InfoPath Form Web Part

7. Alternatives to SharePoint Forms

- Nintex
- K2
- Formotus

8. SharePoint Designer

- What is SharePoint Designer?
- Common Uses of SharePoint Designer

9. Business Process Automation Using Workflow

- Out-of-the-Box Workflow
- Workflow Settings
- Workflow Administration
- Workflow Creation from the Web Browser
- Complete a Workflow Task

10. Creating Custom Workflows

- 2010 Custom Workflows Supported in 2013
- 2013 Workflows

11. Advanced Workflow Topics

- Email Customization
- Creating Custom Workflow Forms
- Workflows and Quick Parts
- Initiation Forms
- Workflow Variables

12. Customizing a SharePoint Environment for Business Process Automation

- Pages
- Web Parts
- Page Design

13. Classroom Q&A

Prerequisites

- Basic computer knowledge and skill
- Familiarity with basic SharePoint navigation
- Familiarity with the basics of SharePoint