

# Toronto SharePoint Camp



## BUSINESS PROCESS, APPLICATIONS AND SHAREPOINT

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[#TSPCAMP2011](#)

# Toronto SharePoint Camp



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Envision IT  
Taking SharePoint to a new level of user experience

TSPUG 

# About Me



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**Collaboration is Key**

**Sweating Your SharePoint Asset**

**Got SharePoint?**

**The Future of SharePoint**

**You've Got SharePoint...Now What!?!**

**The Mid-Project Assessment**

**Implementing SharePoint - a Project Manager's How-To**

**5 Things About a SharePoint Implementation**

**Deploying SharePoint for the Internet**

**Don't Dictate...Collaborate!**

**Change and SharePoint**

**Business Process, Applications and SharePoint**

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# Concatenate



Concatenate Real+Time Home

Welcome the Concatenate Real+Time Portal

Manage assets, relationships, contracts, and finance; all in Real+Time.

Customer Portal Work Sites

- Customer Project Site
- Canadian Tire Projects
- FCR Projects
- 302 Telecom Projects
- Algorithmics Projects
- PSI FM Extranet
- Collins Projects

Prospects

- Related Company Name
- Difenda Corporation
- Collins International
- Santor
- Softchoice
- MarketWire Inc.

Technical FAQ's

- SharePoint 2010 Determine Initial Type
- Site Structure
- SharePoint 2010 "Services" Architecture
- License for Internal - External SharePoint 2010 Use
- Template, Feature, and WebPart Quick Reference Guide

Company Events

| Title                   | Start Time          | End Time               |
|-------------------------|---------------------|------------------------|
| Michael Bartha Vacation | 8/18/2011 12:00 AM  | 8/18/2011 11:59:59 AM  |
| Alex Gardner Vacation   | 8/22/2011 9:00 AM   | 8/26/2011 6:00 AM      |
| Thanksgiving Day        | 10/10/2011 12:00 AM | 10/16/2011 11:59:59 PM |

Twitter Talk about "Concatenate"

8/13/2011 10:07 AM - #SP11C: "Concatenate" @Concatenate

8/12/2011 6:06 AM - RT @Concatenate: Personal, I've always been sceptical as a contractor's baggage. Concatenate offers. Some extra script and headaches.

8/12/2011 9:12 PM - David Mark Personal, I've always been sceptical as a contractor's baggage. Concatenate offers. Some extra... #SP11C @Concatenate

Concatenate

Welcome to CONCATENATE!

Our vision is to Concatenate: to bring and link together. We are both a systems solution consulting shop and a software company, having developed a proprietary enterprise business optimization manager, Concatenate Real Time. At Concatenate, we link technology, people and business process together to build the perfect solution for our clients.

Learn More | Contact Us

Services and Solutions

- SHAREPOINT STARTER KIT**  
Our SharePoint Starter Kit helps your project begin on the right path - no success.
- SHAREPOINT DISCOVERY SESSIONS**  
Concatenate's discovery sessions are designed to maximize your project goals and technical investments.
- C+ WORK MANAGEMENT TOOLS**  
Work management that brings Projects, Tasks, Issues and Risks to the next level of compliance.

Who we are?  
Concatenate is a product and service company focused on building complex business solutions. We combine a powerful blend of business knowledge and market-leading expertise in SharePoint, allowing us to understand and address the most complex of business problems. Click here to learn more about our team and profile.



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# Agenda

- Your Business and SharePoint
- Defining Process
- Increasing Productivity
- Workflow
- InfoPath



# Which are you?

- A. Small (50 employees)
- B. Medium business (500 employees)
- C. Large/Enterprise (more than 500 employees)

| 2011               |       |         |       |
|--------------------|-------|---------|-------|
| Business Size      | Small | Medium  | Large |
| Employees          | <50   | +/- 500 | >500  |
| IT Support         | 2-5   | 10-35   | 50+   |
| Servers            | 32B   | 64B     | 64B   |
| Microsoft Partners | ?     | ?       | ?     |



*Developer*



*End User*



*IT Pro*



*SharePoint Analyst*



*Other*

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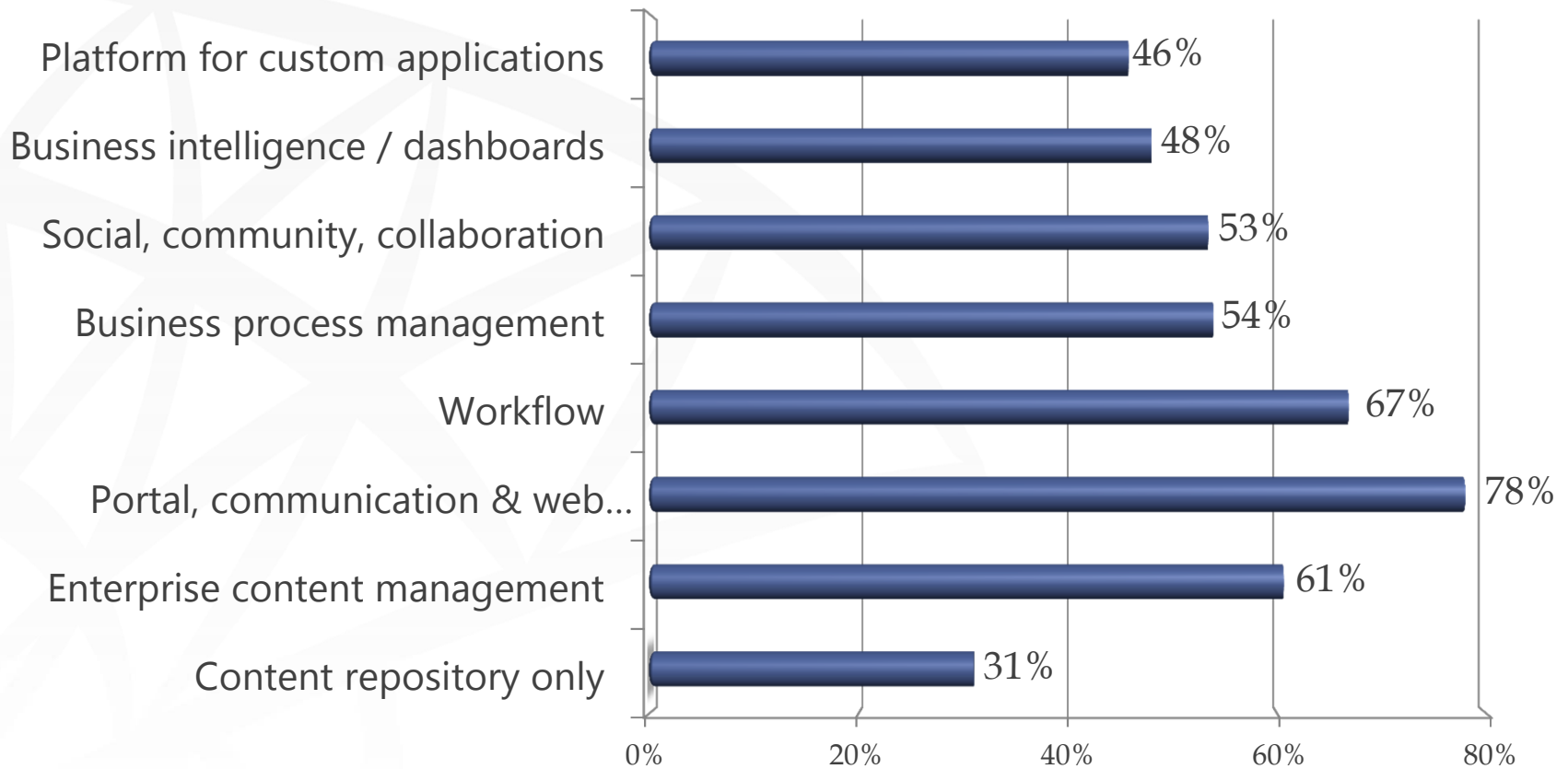


The **goal** is to implement a SharePoint **solution** not as a tool, but as a **Strategic Tool** which enables the realization of **business improvement**.

**Businesses** that once viewed SharePoint as the “**go-to**” place for content are now extending that role into the place where **business gets done.**



# SharePoint's Focus



# Your Business View?



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The image shows a Windows Explorer window. The left pane displays a folder tree structure. The right pane shows a list of files. The status bar at the bottom indicates that the current folder contains 2 items.

**Folder Tree (Left Pane):**

- Desktop
- Downloads
- Favorites
- Links
- My Documents
  - AEC
  - ARCHIVES
  - Bluetooth Exchange Folder
  - Concatenate INC
    - Corporate
    - FINANCING
    - HR
    - INDUSTRIES
      - BROKER
      - Commercial Real Estate
        - CRE MARKETING
        - HOTELS
        - Investment Banking
        - RETAIL
      - Store LifeCycle Mgmt
        - Construction Management
        - Horizant
        - Marketing
        - New Folder
      - NRTA
      - Product Management
      - SALES
- LAUNCH Real Property Enterprise RPE

**File List (Right Pane):**

| Name                             |
|----------------------------------|
| IFMA-CREC-IntroToOSCRE04DEC08[1] |
| Technology101_II                 |

2 items

# Business Interpretation



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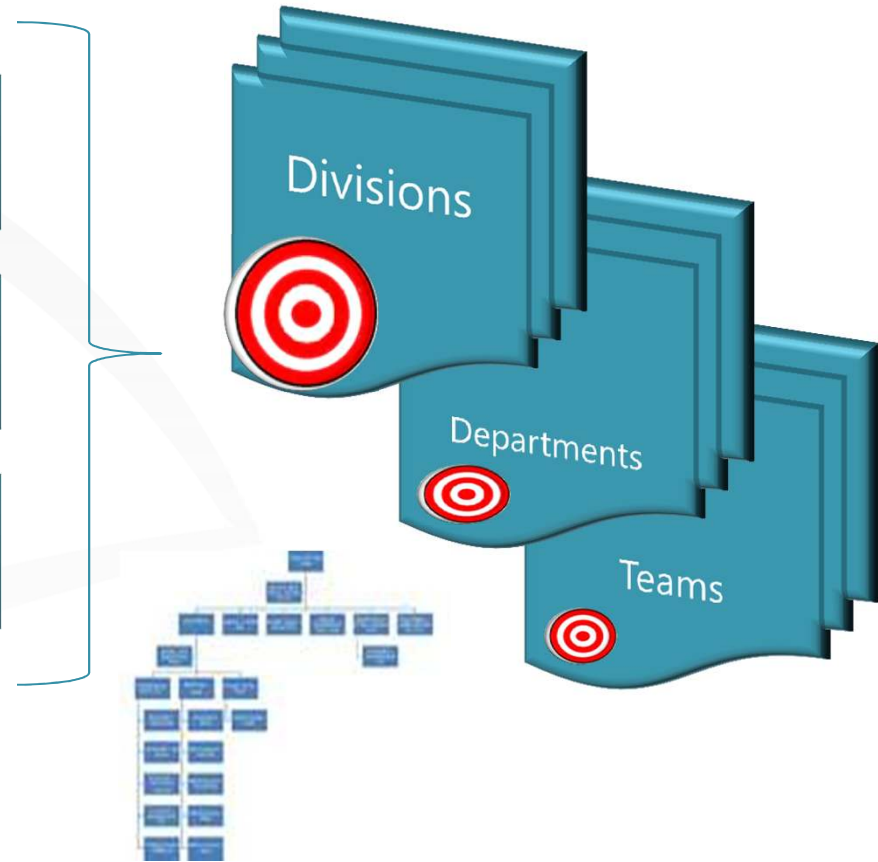
# Business View of SharePoint?



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# Strategy is Developed and then Cascaded down to Divisions, Departments, Teams



# Why Should I Care about Workflow?

- Walk, don't run
- Define common processes, then think workflow
- Workflows help...
  - Automate and manage business processes to ensure that processes are consistent and repeatable

# Workflow in SharePoint

- SharePoint bridges the gap between knowledge and toolset
- Interacts with existing SharePoint technologies
  - Lists and Libraries (Yes, even External Lists)
  - Tasks
  - Email
  - InfoPath





# Workflow Components

- Events
  - List updated/created
  - Manual start
  - Web service
- Conditions
  - If – then
- Actions
  - Send email
  - Update List Item



# OOTB Predefined Workflow

- Predefined
- Fill in the blanks
- Most used within SharePoint
- Can be defined in the browser



# Types of OOTB Predefined Workflows

- Collect Feedback
- Approval
- Disposition Approval
- Collect Signatures
- Three-States
- Publishing



# Creating Business Processes

- Define with Momentum
- Engage the Business
- Create Something New
- Leverage SharePoint



# SharePoint Designer Workflows

- No-code, declarative workflows
- You can build
  - List and Library workflows
  - Reusable workflows
  - Site workflows
- Validate before publishing
- Use Visio to layout
- Create custom activities



# Custom Activities

- Create robust/complex logic
- Can be Sandboxed
- Common Scenarios
  - Interact with LOB applications
  - Custom activities
  - Complex Conditions
  - Utility activities
- Developed in Visual Studio
- Actions file defines meta-data



# Key Takeaways

- For each workflow try to use the simplest method for building them
  - Built-in
  - SharePoint Designer
  - Visual Studio
    - Custom Activities
    - Custom Workflow



# What is a Process?

- The action of taking something through an established and usually routine set of procedures or steps to convert it from one form to another





# InfoPath

- Integration with SharePoint components
- Design custom workflow initiation and task forms.
- Integration with Business Connectivity Services - create, read, update, and delete external business data



# About InfoPath

- Use Rules, Views, and Picture Buttons to create a wizard-like experience
- Use run time events to load data connections (e.g. button click)
- When using external list data, properly configure the External Item Picker for ease of use



# Best Practices with Workflow

- Always try to
  - Configure - OOTB or SPD
  - Extend – Custom Activities
  - Create – Custom Visual Studio Workflows
- Create new Activities to satisfy custom logic/data access
- Create VS Workflows when you need custom flows
- Leverage Re-usable Workflows whenever possible
- Call WCF from Custom Activities

# Thank You

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Please complete your evaluations  
to enter in the prize drawing!