Toronto SharePoint Camp

BUSINESS PROCESS, APPLICATIONS AND SHAREPOINT

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#TSPCAMP2011

Toronto SharePoint Camp

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non~linear creations

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

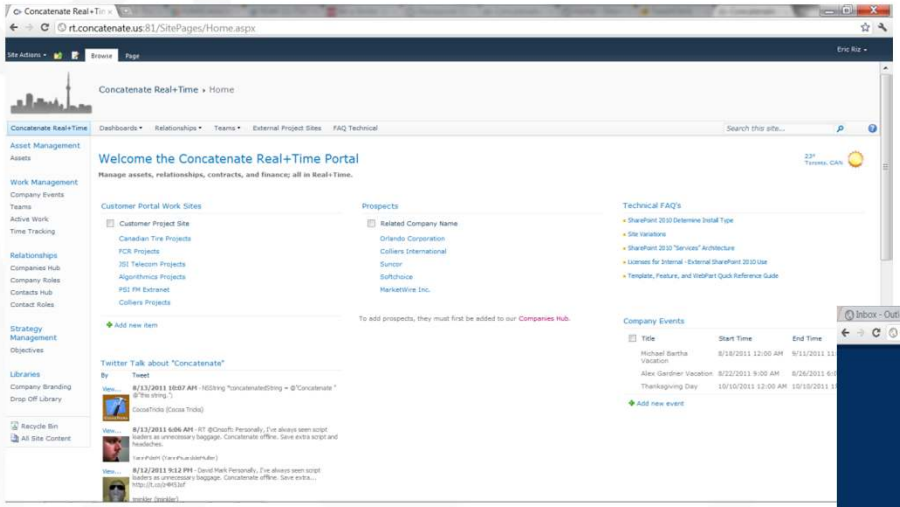
Deploying SharePoint for the Internet

Don't Dictate…Collaborate!

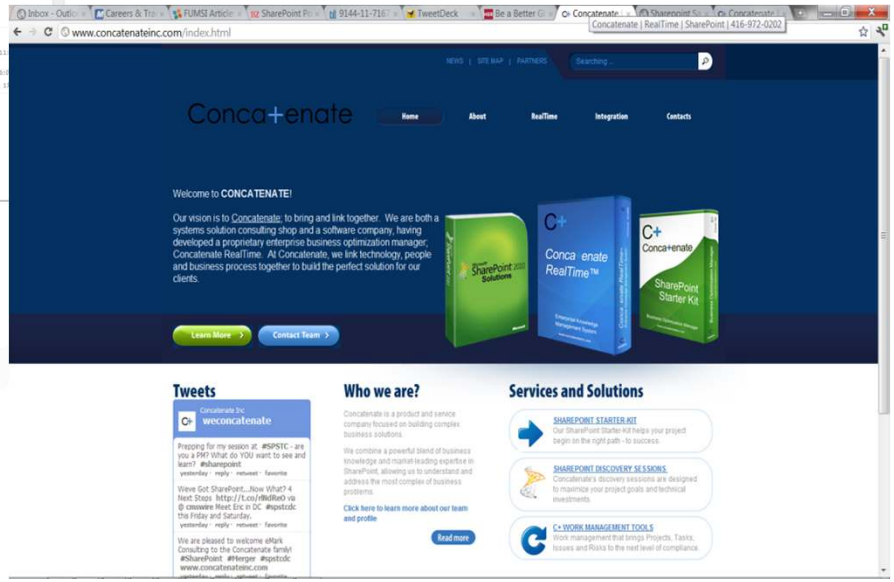
Change and SharePoint

Business Process, Applications and SharePoint

Concatenate



Microsoft® SharePoint® 2010



CDN CHANNEL ELITE AWARDS 2011 GOLD WINNER
BEST COLLABORATIVE SOLUTION

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

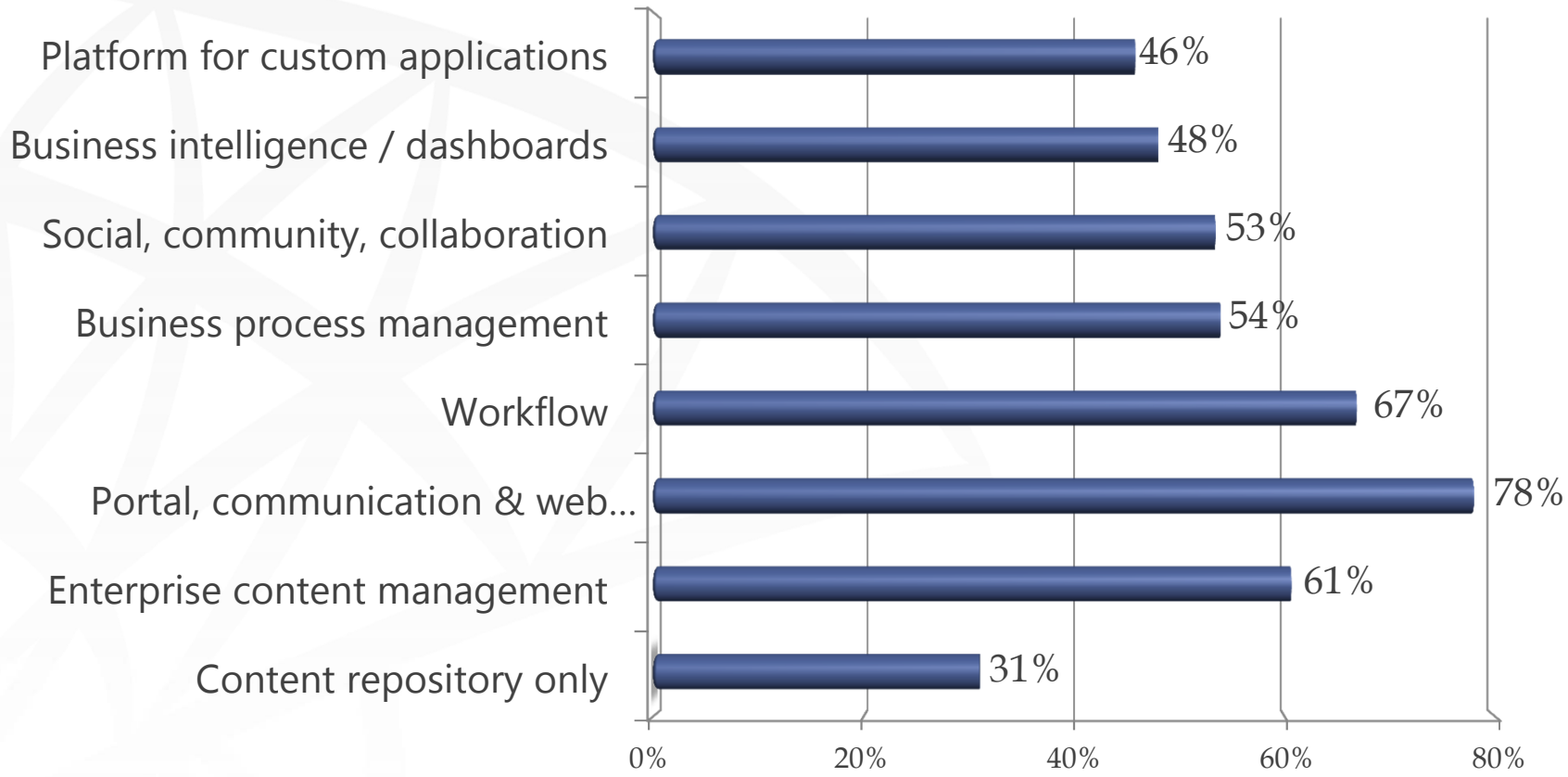
SharePoint Analyst

Other

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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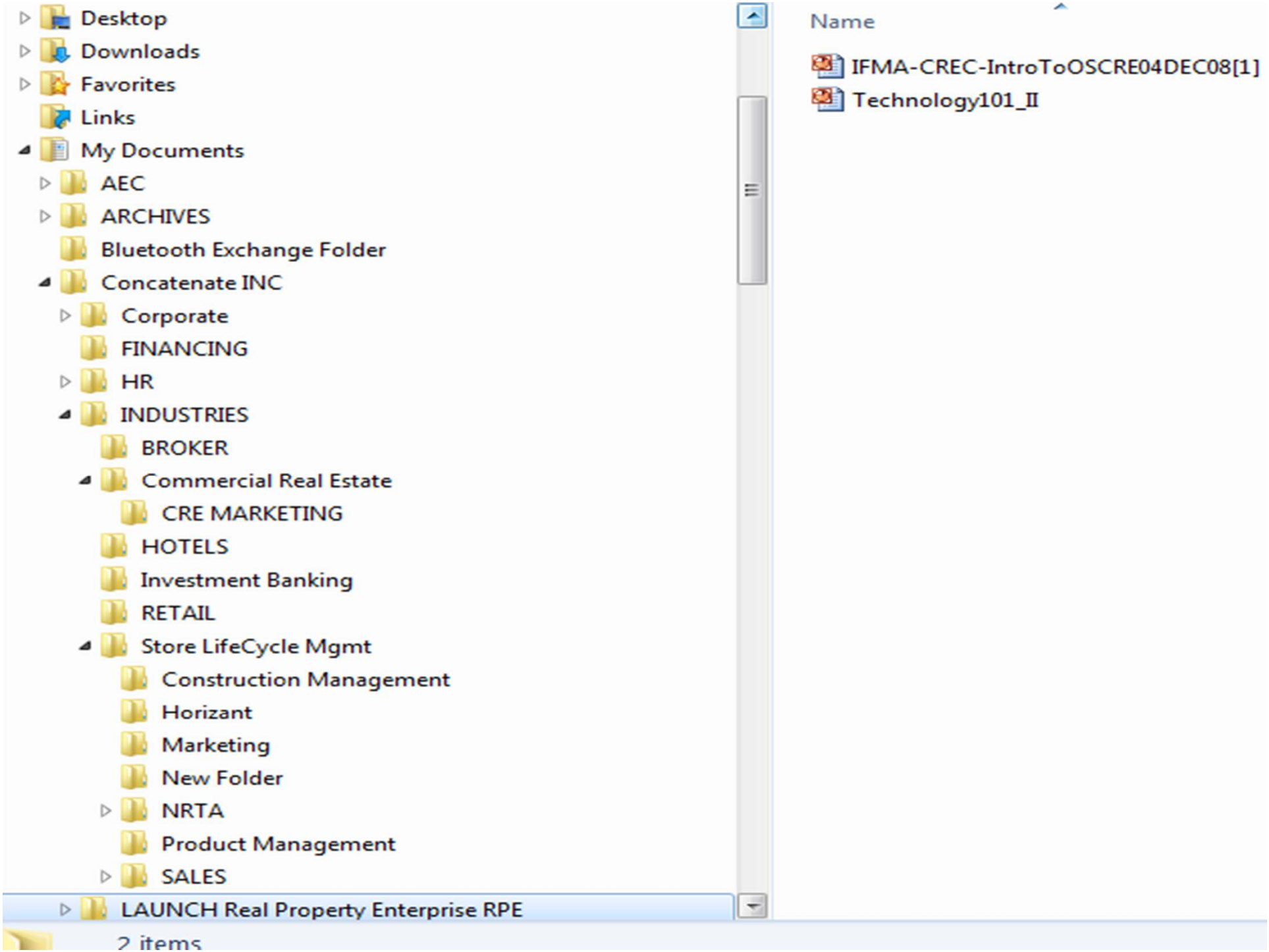
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Construction Management
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Business Interpretation

Business View of SharePoint?

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

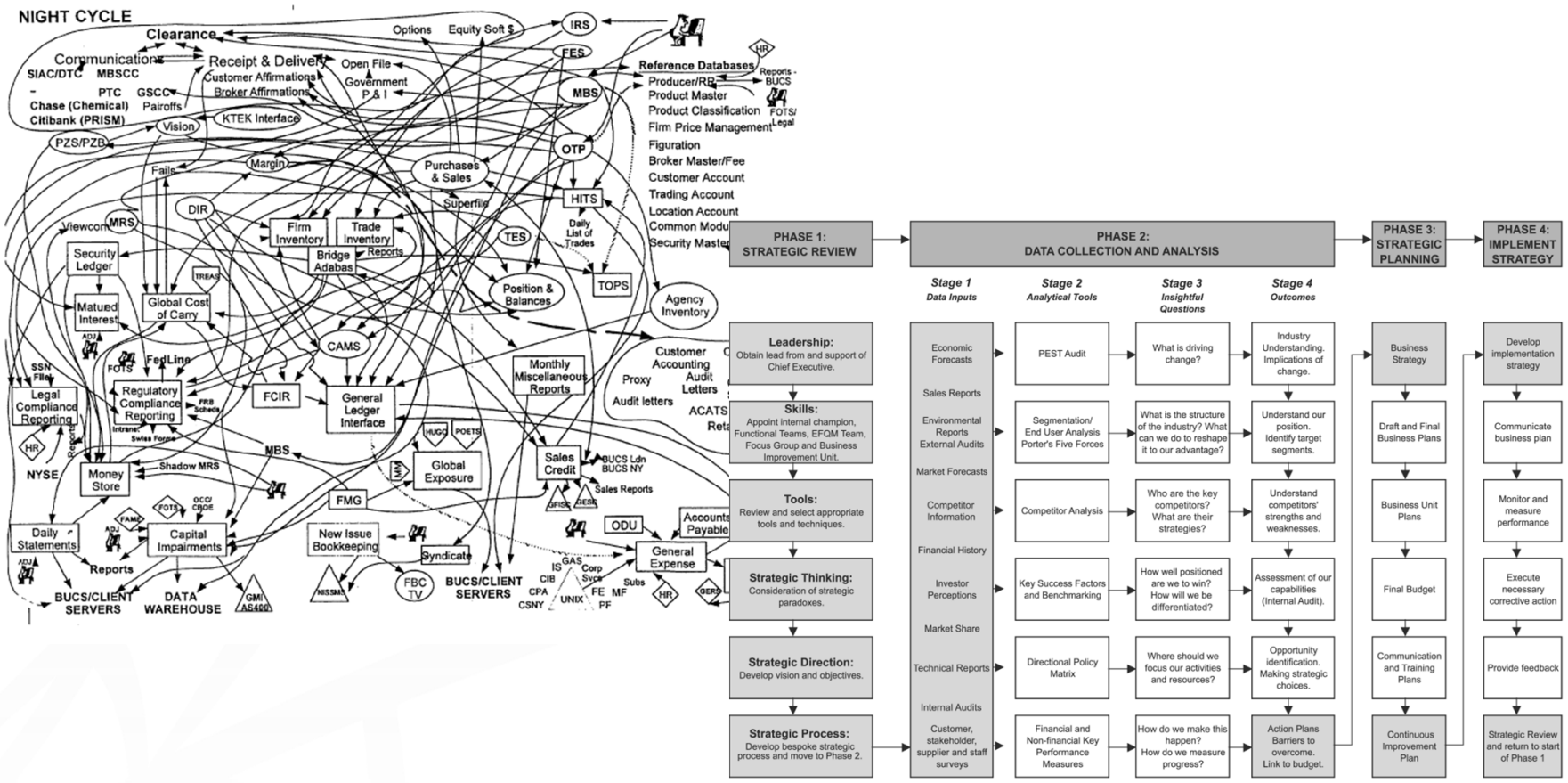
Key Takeaways

- 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

Simple or Complex



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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