



Creating No-Code SharePoint Designer Solutions for SharePoint 2010

Target Audience

Power Users, Developers, Site Collection Administrators

Course Description

This intensive 4-day course demonstrates how to make the most out of Microsoft SharePoint Foundation 2010 (SPF2010) formerly known as Windows SharePoint Services or WSS 3.0) and SharePoint Server 2010 (SPS2010) without having to engage in any custom development. You will be shown how to create business solution using nothing more than the browser and Microsoft Office SharePoint Designer 2010 (SPD).

The course is designed to teach you and give you hands-on experience with the most valuable functionality of SharePoint Server 2010. The course will first walk you through the new SharePoint 2010 user interface and feature enhancements and then move on to an overview of SharePoint Designer 2010. Students will then learn how to create and customize content using SharePoint Designer 2010.

Microsoft has dramatically improved SharePoint Designer 2010 so power users can create robust and interactive pages using things like the new XSLT List View Web Part, improved editing controls for the powerful Data View Web Part and improved workflow authoring capabilities. Students will learn how to create robust solutions using these new capabilities as well as using InfoPath 2010 to create interactive and advanced form solutions.

Students will also learn how to create content-centric solutions using SharePoint Server's Web Content Management (WCM) and Enterprise Content Management (ECM) capabilities as well as consume and interact with data that resides in external systems using the new Business Connectivity Services (BCS) capacities. In addition, the course will also guide students how to create offline SharePoint Server 2010 solutions using SharePoint Workspace 2010.

Student Prerequisites

Attendees should have experience with the Internet Explorer and Office Products such as Word, Excel and Outlook. Previous experience with SharePoint (any version) is ideal but not required.

Refer to the last page for details on the *Hands on Lab Student Workstation Requirements*.



Course Modules

The following modules are included in the course. All modules include a 2-5 exercise hands-on-lab (HOL) for students to perform in a lab environment that should take roughly 45-75 minutes each.

Creating & Customizing SharePoint 2010 Sites

Microsoft has made big investments into SharePoint 2010 to make it a robust platform that can quickly respond to business needs. In this module, you will get a whirlwind tour of how to get around the SharePoint 2010 environment and gain an understanding of the different components that combine together to make up this platform.

- Overview of Microsoft SharePoint Foundation vs. SharePoint Server 2010
- Getting Around in Central Administration & Site Settings
- Team sites and collaboration
- The server ribbon
- Editing a Site's home page
- Adding and customizing Web Parts
- Survey of included Site Templates
- Create a SharePoint Site and change its Theme
- Working with the SharePoint 2010 Ribbon and In-place Editing
- Exploring the Central Administration Site

Introduction to SharePoint Designer 2010

SharePoint Designer 2010 is the recommended application to make customizations and build powerful solutions on top of SharePoint 2010. You will learn how and where SharePoint Designer fits into the big picture in accordance with related SharePoint technologies. You will also understand how to navigate around the SharePoint Designer environment and discover what each piece does.

- Overview of SharePoint Designer 2010 Feature Set
- Exploring a Team Site with SharePoint Designer 2010
- Modifying a Team Site's Master Page
- Adding a custom action
- SharePoint Designer 2010 Security Settings
- Looking Around SharePoint Designer 2010
- Creating Custom Actions
- Discovering Master Pages
- Managing Site Permissions
- Restricting SharePoint Designer Usage



Creating and Customizing Content

SharePoint Designer 2010 can be used to create the SharePoint site structure and manage its content. Creating Content types, site columns, web part pages, web parts, and managing site security can all be accomplished using this application. This module shows how a site administrator can create components much more quickly and efficiently using SharePoint Designer as opposed to using the browser.

- Adding Pages to a Site
- Standard Pages vs. Web Part Pages vs. Wiki Pages
- Creating a List with SharePoint Designer 2010
- Customizing navigation in a Team Site
- Creating Document Libraries and Document Templates
- Creating Site Columns and Content Types with SharePoint Designer 2010
- Create a Subsite and Manage Navigation Options
- Working with Lists
- Working with Images
- Site Columns and Content Types
- Creating Standard Web Pages
- Creating a Web Part Page

XSLT Web Part and the Data View Web Part

Working with and collaborating on data is an essential part of SharePoint 2010. To facilitate the collaboration, Lists and Libraries are utilized heavily in SharePoint. SharePoint Designer 2010 can be used to customize the view of that data to conform to user needs. Aside from manipulating the presentation of SharePoint data, SharePoint Designer can also make connections to and present data from external data sources such as databases and web services. In this module, you will learn how to use SharePoint Designer to work with internal and external data sources.

- Customizing pages with XsltListView Web Part with SharePoint Designer 2010
- Condition Formatting with XsltListView Web Part with SharePoint Designer 2010
- Display XML data and database tables using Data Form Web Part with SharePoint Designer 2010
- Creating List Forms
- Creating List Views
- Creating Database Connections
- Creating Web Part Connections
- Accessing Data through Web Services

InfoPath 2010 and Forms Services

Finally, you can make your goals of going paperless a reality! Microsoft Office InfoPath 2010 and SharePoint Server 2010 together provide a powerful platform for working with electronic forms. In this module, you will see how you can build robust electronic forms with data validation and conditional logic using InfoPath 2010 and then publish them easily to SharePoint Server 2010 to be filled out by the users using just an internet browser.

- Understanding the Scope and Purpose of InfoPath 2010
- Working with the InfoPath Forms Designer
- Forms Libraries and User Published Forms
- Forms Services and Browser-Rendered Forms
- Creating InfoPath Form Library Forms
- Customizing List Forms
- Displaying Forms using InfoPath Form Web Part



Creating Workflows with SharePoint Designer 2010

One of the extremely powerful features in SharePoint Designer 2010 is the ability to create dynamic and reusable Workflows. SharePoint Designer's workflows let you design powerful multi-step workflows from scratch or to build upon the out-of-the-box reusable workflows. You can even create your workflow in Visio 2010 and then import it within SharePoint Designer 2010. In addition to all that, you can customize your workflow input forms using InfoPath 2010. In this module, you will learn all about SharePoint Designer Workflow's and their integration with Visio and InfoPath.

- Motivation For Workflows To Automate Business Processes
- Understanding Various Types Of Workflows: Site, List, Content Type & Reusable
- The SharePoint Designer 2010 Workflow Task Editor
- Modeling A Workflow With Visio 2010
- Importing A Visio 2010 Workflow Into SharePoint Designer 2010
- Customizing Workflow Input Forms
- Creating a List Workflow
- Building Workflows with Visio 2010 & SharePoint Designer 2010
- Creating a Site Workflow

Web Content Management

SharePoint 2007 was Microsoft's first foray into Web Content Management (WCM) on the SharePoint platform. In SharePoint 2010 Microsoft improved the WCM offering in many ways, In this module you'll see how to leverage SharePoint Server 2010 WCM to create content-centric sites as well as how to create a custom look and feel experience

- Overview of Publishing Site Functionality
- Creating and Approving Publishing pages
- Integrating Master Pages and custom CSS files
- Creating Custom Page Layouts
- Customizing the Workflow Behind the Publishing Approval Process
- Creating a Publishing Portal
- Creating Custom Page Layouts
- Creating and Approving Publishing Pages

Enterprise Content Management

Microsoft's approach to ECM is to encourage more people to participate in ECM solutions as well as provide the tools for records managers to manage and analyze the large quantities of content. In this module you will learn about Microsoft's ECM strategy within SharePoint Server 2010. You will also see how you can leverage SharePoint Server 2010 to create robust content-centric solutions using Web Content Management.

- Enterprise Metadata & Taxonomies
- Creating and exploiting term sets
- In-Place Records Management
- Document Sets
- Unique Document IDs
- Working with Managed Metadata
- Working with Document Sets



Enterprise Wikis and Social Networking

A major area of attention in SharePoint 2010 is the social aspect. Each user has their own My Site which serves as their identity for the entire deployment and organization. In this module you'll learn how to implement & customize My Sites as well as use some of the other social networking capabilities like wikis, the new Enterprise Wikis, blogs and audience targeting in SharePoint 2010.

- The Enterprise Wiki site template
- Integrating branding artifacts and term sites
- User Profiles
- My Sites
- Audience Targeting
- Creating an Enterprise Wiki Site Collection
- Creating a Term Set
- Working with Terms, Tags, Keywords and Ratings in the Enterprise Wiki Site
- Creating User Profiles
- Creating and Setting Up a My Site

Leveraging External Data in SharePoint 2010 with Business Connectivity Services

Microsoft first introduced the concept of the Business Data Catalog (BDC) in SharePoint 2007 to consume data from external sources. In SharePoint 2010 Microsoft improved on this platform by adding the ability to read/write data to these external systems as well as expand on the available data sources by adding a new concept: the .NET Connector. In this module you'll learn how to use SharePoint Designer 2010 to integrate your SharePoint environment with external Line of Business Data to create robust business solutions.

- Overview of options to leverage external data in SharePoint Server 2010
- Overview of External Content Types (ECT)
- Using SharePoint Designer 2010 to customize ECTs
- Using ECTs in external lists
- Using ECTs in search solutions
- Creating External Content Types in SharePoint Designer
- Importing External Content Types in BCS
- Expose External Content Types in Outlook
- Create Quick Parts in a Microsoft Word Template to Expose Line of Business Data

Creating Offline Solutions with SharePoint Workspace 2010

Working with SharePoint offline is a powerful feature that is made available with the use of SharePoint Workspace 2010 (formerly called Groove). Using Workspace 2010, site users can continue to contribute and collaborate easily while they are not connected to the site online. Once back online, the changes automatically synchronize back to SharePoint online. You will learn how to setup a SharePoint Workspace to take advantage of this powerful feature.

- Overview and introduction to SharePoint Workspace 2010
- Taking SharePoint site's content offline with SharePoint Workspace
- Customizing SharePoint Workspace
- Synchronize using SharePoint Workspace 2010
- Working with External Lists in SharePoint Workspace
- Use InfoPath to Edit a SharePoint List Form
- Security in SharePoint Workspace



Hands on Lab Work Station Requirements

SharePoint Server 2010 has steep hardware requirements. We recommend each student have their own virtual machine with everything required to do the lab installed on it including Windows Server 2008, SQL Server 2008, SharePoint Server 2010, Office 2010 and Visual Studio 2010. In our experience the following student workstation specifications provide the minimum acceptable experience for students:

- Dual Core CPU 1.6Ghz (or faster)
- 6GB RAM (or more)
- 100GB+ hard drive
- Windows Server 2008 host operating system with the Hyper-V Role enabled

Each student's virtual machine should be allocated 4GB of memory; anything less can result in a sub-optimal student experience just as anything higher improves the experience.

Due to Microsoft's software licensing requirements & limitations, Critical Path Training is not permitted to distribute/redistribute Microsoft software or virtual machines preinstalled with Microsoft SharePoint Server 2010. However we do provide a step-by-step document walkthrough on creating your own virtual machine for students where you can use your own software license keys or use the freely available trial versions (all links are included in the document). This document, **SharePoint Server 2010 RTM Virtual Machine Setup Guide**, is available from our site (www.CriticalPathTraining.com). Login (if you don't have one, create your own free login) and navigate to the **Members** section. Within this section you'll find the setup guide under the **Articles** section.

Answers to frequently asked questions:

- **Can't Critical Path Training provide a virtual machine with trial software?**
Unfortunately that is not permitted under Microsoft's licensing requirements & limitations.
- **Can I use VM Ware Workstation/Player?**
You can use any virtualization technology you choose, as long as it can run SharePoint Server 2010. Critical Path Training simply prefers Microsoft's Hyper-V technology.
- **Do I have to virtualize the environment or can I run everything native on the student's workstations?**
Virtualization isn't required; it is just the most common way to conduct SharePoint Server 2010 courses.