No-Code SharePoint 2013 Workflows with SharePoint Designer 2013 and Visio
55048A; 3 Days, Instructor-led

Course Description
This course is designed for the Power User, Collection Administrator, and Developers that want to learn the new SharePoint 2013 workflow development process using SharePoint Designer 2013, the Visual Designer, and Visio 2013. Included with the course and intended for you to take away are videos of each of the critical lessons taught in the course.

Audience Profile
This course is intended for all business professionals including IT professional, developers, managers, project leads, project managers, and team leads, but we do not expect coding skills, just thinking skills!

Course Completion
After completing this course, students will be able to:
- Explore SharePoint 2013 Designer User Interface.
- Use Backstage View.
- Create a Subsite.
- Create a Site Template.
- Delete a Subsite.
- Create a SharePoint List.
- Create a SharePoint Library.
- View Content Types.
- Create a New Content Type.
- Create a Site Column.
- Add a Content Type to a List or Library.
- Use The Out-Of-The-Box Workflows.
- Use The Three-State Workflow.
- Use The Approval Workflow.
- Use The Collect Feedback.
- Create a Workflow Lunch Request.
- Create a Workflow with a Custom Message.
- Create and Configure Workflow Parameters
- Create and Configure Stages, Steps, and Parallel Blocks.
- Create and Configure Reusable Workflow.
- Create and Configure State Machine Workflow.
- Use a List as a Data Source.
• Open a Workflow in Visual Designer.
• Create a Workflow in Visual Designer.

Prerequisites
Before attending this course, students must have:
• Basic computer skills.
• Knowledge of what you want to do either now or in the future with SharePoint 2013 workflows.

Course Outline
Module 1: Course Overview
This module explains how the class will be structured and introduces course materials and additional administrative information.

Lessons
• Introduction
• Course Materials
• Facilities
• Prerequisites
• What We'll Be Discussing

After completing this module, students will be able to:
• Successfully log into their virtual machine.
• Have a full understanding of what the course intends to cover.

Module 2: SharePoint 2013 Workflows
Lessons
• What Is A Workflow?
• What Is New In SharePoint 2013 Workflows?
• The Main Building Blocks
• Activities
• Actions
• Workflow Forms
• Tasks
• Understanding Containers
• Types Of Workflows
• Sequential Workflow
• State Machine Workflow
• Flow Chart Workflow
• Workflow Associations And Subscriptions
• Workflow Visualizations
• Optional Module Topics

Lab: SharePoint 2013 Workflows
• Exploring SharePoint 2013 Designer User Interface
• Backstage View
• Create a Subsite
• Create a Site Template
• Delete a Subsite
• Create a SharePoint List
• Create a SharePoint Library
• View Content Types
• Create a New Content Type
• Create a Site Column
• Adding a Content Type to a List or Library

After completing this module, students will be able to:
• Explore SharePoint 2013 Designer User Interface.
• Use Backstage View.
• Create a Subsite.
• Create a Site Template.
• Delete a Subsite.
• Create a SharePoint List.
• Create a SharePoint Library.
• View Content Types.
• Create a New Content Type.
• Create a Site Column.
• Add a Content Type to a List or Library.

Module 3: SharePoint 2013 Out-Of-The-Box Workflows

Lessons
• Content Types
• Workflow Tasks Lists
• Out-Of-The-Box Workflows
• Disposition Approval
• Three-State Approval
• Collect Feedback
• Collect Signatures
• Publishing Approval
• Workflow Planning

Lab: SharePoint 2013 Out-Of-The-Box Workflows
• Out-Of-The-Box Workflows
• Three-State Workflow
• Approval Workflow
• Collect Feedback

After completing this module, students will be able to:
• Use The Out-Of-The-Box Workflows.
• Use The Three-State Workflow.
• Use The Approval Workflow.
• Use The Collect Feedback.
Module 4: SharePoint Designer 2013 Workflows

Lessons
- Workflow Interop
- SharePoint 2013 Designer Workflow Interface
- Workflow Ribbon Commands
- Understanding the Workflow GUI
- Naming and Messages
- Workflow Parameters
- Stages, Steps and Parallel Blocks
- Reusable Workflows
- Workflow Associations and Subscriptions
- Workflow Best Practices

Lab: SharePoint Designer 2013 Workflows
- Workflow Lunch Request
- Workflow with Custom Message
- Workflow Parameters 1
- Workflow Parameters 2
- Stages, Steps, and Parallel Blocks
- Reusable Workflow
- State Machine
- List as a Data Source

After completing this module, students will be able to:
- Create a Workflow Lunch Request.
- Create a Workflow with a Custom Message.
- Create and Configure Workflow Parameters
- Create and Configure Stages, Steps, and Parallel Blocks.
- Create and Configure Reusable Workflow.
- Create and Configure State Machine Workflow.
- Use a List as a Data Source.

Module 5: Workflows Using SharePoint Designer 2013 and Visio 2013

Lessons
- Comparing Text to Visual Designer
- SharePoint Designer 2013 Visual Designer
- Errors in Workflows with Visio 2013
- Packaging Workflows

Lab: Workflows Using SharePoint Designer 2013 and Visio 2013
- Open a Workflow in Visual Designer
- Create a Workflow in Visual Designer

After completing this module, students will be able to:
- Open a Workflow in Visual Designer.
- Create a Workflow in Visual Designer.
Module 6: Concept Reinforcement Scenarios

Lessons
- Scenario 1
- Scenario 2
- Scenario 3
- Scenario 4
- Scenario 5 (Extra Credit – No Solution)

Lab: Concept Reinforcement Scenarios
- Scenario Solution 1
- Scenario Solution 2
- Scenario Solution 3
- Scenario Solution 4
After completing this module, students will be able to:

- Create new site columns
- Design and implement content types
- Implement a taxonomy using the Managed Metadata Service
- Implement the Content Organizer
- Define site and list templates
- Define best practices around creating consistency

**Module 5: Securing a Company Portal**

This module explains how permissions work within a site collection, and how the tools within SharePoint 2013 are used to manage and maintain them. It is crucial that SharePoint 2013 site collection and site administrators are able to create and manage permissions within SharePoint 2013.

**Lessons**

- Explaining Permissions and Security in SharePoint
- Creating SharePoint Groups
- Managing Permissions within SharePoint
- Sharing versus Traditional Security

**Lab: Managing Permissions in SharePoint**

- Viewing Permissions of SharePoint Objects
- Adding Users and Groups to SharePoint Objects
- Creating a New SharePoint Group with Custom Permissions
- Creating New SharePoint Objects with Unique Permissions

After completing this module, students will be able to:

- Explain the concept of sharing
- Design and implement security
- Define best practices around SharePoint 2013 security

**Module 6: Customizing the Look of a Portal**

This module explains how to design a company portal using out-of-the-box web parts and themes in SharePoint 2013.

**Lessons**

- Changing the Appearance of the Portal
- Editing a Page
- Working with Web Parts and App Parts
- Targeting Audiences with Content

**Lab: Adding and Configuring Web Parts**

- Creating the Content Type
- Applying the Content Type
- Creating a List Template
- Adding Content to a List
- Creating a Managed Property
- Adding the Content Search Web Part
Lab: Connecting Web Parts
- Creating a Project Site
- Creating an Issue Tracking List
- Updating the Home Page
- Testing the Home Page

Lab: Applying Themes to Your Company Portal
- Adjusting the Theme
- Changing the Logo

After completing this module, students will be able to:
- Implement themes and add a logo
- Add web parts to pages
- Leverage audiences for targeting content

Module 7: Extending a Company Portal
This module covers how companies can extend their SharePoint 2013 environment to include data from other line of business applications using SharePoint Designer 2013. It also explores how companies can leverage SharePoint for records management and eDiscovery.

Lessons
- Creating External Content Types
- Setting up an eDiscovery Center
- Exploring other Records Management Options

Lab: Accessing External Data
- Create the External Content Type
- Creating the Lists and Forms
- Testing the External List
- Working with Business Data Web Parts

Lab: Leveraging Records Management to Preserve Data
- Using a Records Center
- Using an eDiscovery Center

After completing this module, students will be able to:
- Define external content types
- Define and implement records management
- Define and implement an eDiscovery center

Module 8: Leveraging Web Content Management
This module defines the process for using the publishing features of SharePoint 2013 to create rich content pages.

Lessons
- Enabling Web Content Management
- Managing the Structure of Web Content
• Navigating a Site Using Managed Metadata
• Configuring a Published Approval Workflow

**Lab: Creating a Rich Publishing Site**
• Creating a Web Content Management Site
• Creating a News Site
• Setting the Default Page Layout
• Configuring Image Renditions
• Creating News Pages

**Lab: Configuring a Published Approval Process**
• Adding a Publishing Approval Workflow
• Testing the Workflow

**Lab: Implementing a Managed Navigation Site**
• Enabling the Managed Metadata Navigation
• Creating Navigation Terms
• Creating Additional News Pages
• Controlling the Navigation and Page Structure

After completing this module, students will be able to:
• Enable web content management
• Create a Managed Metadata navigation site
• Implement image constraints
• Define the structure of pages
• Implement a publishing workflow

**Module 9: Bridging the Social Gap**
An important advancement in SharePoint 2013 is the expansion of social computing features. Many organizations have challenges when working with internal talent management, also known as knowledge management. For example, an organization may need to find an individual with the specific skills and knowledge to assist in completing a task or project. SharePoint 2013 offers a viable platform to help organizations with talent or knowledge management.

**Lessons**
• Configuring Social Features in SharePoint 2013
• Creating a Community Site

**Lab: Designing a Social Experience in SharePoint 2013**
• Enabling Content Ratings
• Configuring RSS Feeds
• Enabling Social Features in My Profile

**Lab: Creating a Community Site**
• Creating the Community Site
• Configuring the Community Site
• Creating a Discussion
- Replying to a Discussion
- Managing a Discussion

After completing this module, students will be able to:
- Describe the role of social computing in SharePoint 2013
- Describe best practices for implementing social collaboration
- Design a social experience
- Implement a community site leveraging the social computing features of SharePoint 2013

Module 10: Finding Information Using Search
It is often challenging for many organizations to find information quickly and easily. Users can use the search function within SharePoint 2013 to search across a variety of content sources including documents, people and line of business applications with little to no additional configuration. With a small amount of effort, however, organizations can create a robust search experience that is in alignment with their business needs. In this module, students will learn how to leverage search within SharePoint 2013 to help users more quickly find the information they need.

Lessons
- Exploring the Search Features of SharePoint 2013
- Configuring the Search Settings

Lab: Configuring an Advanced Search Center
- Connecting to a Search Center
- Creating a Managed Property
- Creating a Result Source
- Configuring the Search Center
- Updating the Refinement Panel
- Updating Search Navigation

After completing this module, students will be able to:
- Create an enterprise Search Center
- Customize the Search Center

Module 11: Controlling and Planning for Growth
It is necessary to develop a formal governance plan and committee to maintain quality and consistency in SharePoint. Governance defines policies, procedures and guidelines for how SharePoint will be managed and outlines the roles, responsibilities and actions required to administer and support the SharePoint environment.

Lessons
- Reviewing Governance for Site Administration
- Discussing the Execution of Governance

After completing this module, students will be able to:
- Explain the role of governance for SharePoint
- Develop a governance plan and team
Module 12: Administering a Company Portal Built on SharePoint 2013

This module covers other tools and settings in SharePoint 2013. Site collection administrators or site administrators work as part of their day-to-day activities.

Lessons

- Exploring Settings for Site Collection Administrators
- Exploring Settings for Site Administrators

After completing this module, students will be able to:

- Identify additional settings for site collection administrators
- Identify additional settings for site administrators