



SharePoint

SPDSGN: SharePoint Designer for Power Users (Versions 2016 / 2013 and Office 365)

\$2,495.00

- 3 Days
- Gain mastery in this very powerful application!
- Learn to automate real business procedures and maximize the feature set!
- Interface Exclusive Share Point Class

Upcoming Dates

Course Description

In this 3-day instructor led course students will learn how to use SharePoint Designer effectively in all its roles with SharePoint. Students will learn the ins and outs of SharePoint Designer as a tool to create and manipulate SharePoint Lists, Libraries, Content Types, Pages, Web Parts, External Content Types and more.

Important Note: All labs are done using SharePoint Designer 2013 in a SharePoint 2016 on Premise Lab environment. This course is applicable to the following versions of SharePoint: **SharePoint 2013, SharePoint 2016 and SharePoint Online via Office 365.** Currently SharePoint Designer 2013 is the tool to be used for these versions of SharePoint.

Course Outline

1. Module 01 SharePoint Overview

An overview of the pieces of the SharePoint Puzzle. In this module, we review each of the components that play a central role in our dealings with SharePoint from the perspective of the user who will be working with SharePoint Designer.

1. The Farm
2. Service Applications
3. The Workflow Farm
4. Web Applications
5. Content Databases
6. Site Collections
7. Sites
8. Features
9. Lists
10. List Items
11. Libraries
12. Library Items
13. Metadata
14. SharePoint Workflow
15. Review

Lab – in this lab, will be getting to know the environment that you'll be working in for this class. The first thing to know is the architecture that you'll be working with each student in this class has been provided with a series of site collection each of the site collections represents an area for specific things you will do as a student in the class.

2. **Module 02 SharePoint Designer the Tool**

SharePoint Designer is a very powerful tool. It is quite different from its predecessors, SharePoint Designer 2007 and SharePoint Designer 2010.

This module covers the downloading and installation of the product. There are a few very important 'gotchas' that are covered here. The User Interface is covered next at a high level including the ability to customize the user interface for a particular user's needs. We detail the core components such as the Ribbon, Navigation and Content areas that make this product so great. We cover the settings pages that allow for observation as well as configuration of certain SharePoint components and then cover the Code View and the absence of the What You See is What You Get (WYSWYG) user interface that takes many users by surprise.

1. Installing SharePoint Designer
2. The User Interface
3. Connecting To SharePoint
4. The User Interface
5. Quick Access Toolbar
6. The Ribbon
7. Navigation Pane
8. Content Area
9. Settings Pages
10. Code View

Lab – Students will install and configure SharePoint Designer. They will then review the lab environment and connect to an existing Team Site and an Existing Publishing Portal and comparing the differences. Reviewing the Settings pages and user interface.

3. **Module 03 Creating SharePoint Artifacts**

SharePoint Designer can be used to create many of the same things you would do in the browser. You can use SharePoint Designer to create and configure many of the same artifacts you create through the browser.

Unlike previous versions of the product where power users created amazing Conditional Formatted Web Parts, Views, new Page Layouts in Publishing Sites, and even create customized Master pages for branding projects, SharePoint Designer is not the tool of choice for these.

In fact, creating custom conditionally formatted views will require some serious XSLT or JavaScript skills. In this module we will cover all of the above and introduce some XSLT examples as well as the new JSLink framework for creating custom Views and also customizing the out of the Box List Forms. We will look at the fundamental difference between Collaboration and Publishing artifacts and Libraries and take a look at samples of both.

Finally the Module completes with a Lab where most the topics covered are reinforced with actual hands on experience.

1. Lists
2. Libraries
3. Site Columns
4. Content Types
5. Sites
6. SharePoint Designer Code View Settings
7. Pages
 1. Collaboration Pages
 2. Publishing Pages

- JQuery Pages

1. Snippets

1. Custom List Forms

2. Custom Actions

3. Custom Views

1. XSLT

2. JSLink

Lab – In this 4-part lab, students will create a new site and then populate it with Lists, Libraries, and Pages. Students will create Site Columns and a Custom Content Type and then create and configure a Library to use the new Content Type.

Students will add several web parts to different pages. Students will use code snippets to create custom pages that leverage jQuery, XSLT, and JSLink. (Students will not write any code, snippets will be provided).

4. **Module 04 SharePoint 2010 Workflows**

SharePoint Designer is the tool used to create what are referred to as Custom SharePoint 2010 Workflows. These are the same very powerful workflows supported in SharePoint 2010. SharePoint is also the tool used to create SharePoint Workflows which take advantage of a different fundamental architecture which allows for greater scalability. Some Farms deploy SharePoint Workflows, and some do not. For either way, Custom 2010 Declarative Workflows created with SharePoint Designer are supported.

1. What is Workflow?
2. SharePoint 2010 Workflow Runtime
3. SharePoint Workflow Runtime
4. Out of Box Workflows
5. Sequential Workflows
6. State Machine Workflows
7. 2010 Workflows with SharePoint Designer
8. Initiation Form Parameters
9. Define Workflow Lookup
10. String Builder
11. Local Variables
12. Association Columns
13. Conditions
14. Powerful Comparisons
15. Actions
16. Steps
17. Impersonation Steps
18. Parallel Blocks
19. Tasks List
20. Workflow History List
21. Visualizations
22. Start Options
23. Associations
24. List / Library Workflows
25. Reusable Workflows
26. Content Type Workflows
27. Site Workflows
28. Globally Reusable Workflows
29. Planning
30. Designing
31. Creating
32. Deploying

This lab has three exercises. **(NOTE: all screen shots are shown as StudentX please use *YOUR* student letter)**

1. **Exercise One - SharePoint 2010 Workflow - Title Setter** Students will reference a planning diagram and then create a Document Library to which they will deploy a custom workflow that checks to see if a new document has a title when it's added to the library, if it doesn't it will create a new string and set the Document Title to that value. This workflow will automatically start when a document is added to the library.
2. **Exercise Two – Adding Functionality to the SharePoint 2010 Title Setter Workflow** Students will edit their Title Setter Workflow to accept user input and change the workflow to be manually started by users. It is very common to add functionality to an existing workflow that has been deployed. These changes include:

v Gathering the value of the new Title from the User with a workflow Initiation form.

v Adding email notification to their workflow.

An updated diagram including the added functionality will be provided.

3. **Exercise Three - Business Requirements Workflow** Students are provided with a set of Business Requirements and they must go through the entire planning, design, and implementation of their solution from start to finish. Students will review and explain their

plan with the instructor before beginning the implementation phase.

5. **Module 05 SharePoint Designer Workflow Manager Workflows**

1. Workflow Manager
2. Stages
3. Visual Designer
4. Click and drag
5. Copy and Paste
6. Loops
7. Call Web Service Action
8. Start Workflow Actions
9. Packaging
10. Dictionary Type Variables

Lab: Your instructor will lead you through a series of Labs that demonstrate some of the differences and functionality offered by those implementations with a Workflow Farm that can create SharePoint 2013 Workflows.

Special attention will be paid to the differences between Stages and Steps.

1. **SharePoint 2013 Version of the Title Setter Workflow**
2. **Instructor Demo - SharePoint 2013 Looping Workflow**

6. **Module 06 External Content Types**

1. Types of External Content Types
2. Authentication
3. Setting Up the Connection
4. Creating the Operations
5. Parameters
6. Filters
7. Creating External Lists

Lab: Students will learn how to create connections to external systems and bring the Line of Business Data to SharePoint using SharePoint Designer 2013 to set up the connections and create the allowed operations on the external systems using the SharePoint User Interface. Students will use several of the Web Parts in the Business Data Category to create interactive solutions.

Instructor will lead Students through process of configuring and Creating External Content Type and then creating Lists, and a Web Part Page with Connections to showcase the dynamic filtering of external content.

Students will connect to an External database and configure a mapping of the External Content Type to the Office Contact Object in order to facilitate the export of data in business card view to an outlook client application.

7. **Module 07 SharePoint Branding Landscape**

1. SharePoint Designer Role
2. Composed Looks
3. Collaboration Sites
4. Publishing Sites
5. Design Manager

Lab: Composed Looks, the second part deals with creating a Custom Composed Look and finally Branding Publishing Sites with Design

Manager.

SharePoint Designer 2013 is not the tool used for branding Publishing sites any more in most cases, so the process is discussed in depth and demonstrated so that students who encounter this as part of their job know where to start.

Lab – Composed Looks

Lab Overview: Students Will Use and Customize a Composed Look and apply it to a Site.

Audience

SharePoint Power Users who are given access to SharePoint Designer.

Prerequisites

Students should be effective Site Collection Administrators in SharePoint (55033).

A Fundamental understanding of HTML, CSS, JavaScript / JQuery are helpful, but not required.

What You Will Learn

At the end of this course student will be able to:

1. Connect to SharePoint using SharePoint Designer
2. Create and configure SharePoint Artifacts using SharePoint Designer
3. Plan, create, configure and deploy SharePoint Designer Custom Workflows
4. Create and configure External Content Types using SharePoint Designer
5. Understand the SharePoint Branding Landscape and the Role of SharePoint Designer in it.