

Microsoft SharePoint 2007: Business Processes

Table of Contents

INTRODUCTION	INTRO-1
Prerequisites	INTRO-2
Installing the Practice Files	INTRO-3
Software Requirements	INTRO-3
Configuring the Environment	INTRO-4
Installation	INTRO-4
Configuring SharePoint.....	INTRO-5
Setting Up the Hosts File Entry	INTRO-5
Creating a New Web Application	INTRO-7
Pre-Loading Class Templates.....	INTRO-12
Creating Users	INTRO-14
Configuring Windows Server 2003 for Visual Studio 2008 Deployment.....	INTRO-17
Disable Internet Explorer Enhanced Security Configuration.....	INTRO-17
Configure the Create GUID Tool.....	INTRO-17
Conventions in XML Samples.....	INTRO-19
About the Authors	INTRO-20
 OUT-OF-THE-BOX BUSINESS PROCESS AUTOMATION	 1-1
Pre-Class Installation Instructions	1-2
Business Process Automation (BPA)	1-4
Using SharePoint for BPA	1-6
Using SharePoint Lists.....	1-6
Creating and Using Alerts.....	1-22
Active Alerts in SharePoint	1-23
Passive Alerts in SharePoint.....	1-28
Using Out-of-the-Box Workflows	1-31
Workflow Modes of Operation.....	1-31
Approval Workflow	1-33
Three-State Workflow	1-33
Collect Feedback	1-33
Collect Signatures.....	1-34
Disposition Approval	1-34
Modifying Running Workflows.....	1-34
Workflow History	1-35

LAB 1: OUT-OF-THE-BOX BUSINESS PROCESS AUTOMATION	1-39
Lab 1 Overview	1-40
Create a Custom List to Track Project Expenses	1-41
Configure the Approval Workflow Template	1-56
SHAREPOINT DESIGNER WORKFLOWS	2-1
Pre-Class Installation Instructions	2-2
SharePoint Workflow Features	2-4
SharePoint Designer Overview.....	2-5
Web Page Editing	2-5
Reporting	2-5
File Management	2-5
SharePoint Designer Workflows	2-6
Determining the Status of a Workflow	2-7
Creating Workflows in SharePoint Designer.....	2-9
Workflow Events, Actions, Conditions, and Steps	2-9
Workflow Forms and Variables.....	2-30
Workflow Forms	2-30
Workflow Variables	2-31
Extending SharePoint Designer with Custom Activities.....	2-36
Workflow Best Practices	2-37
LAB 2: SHAREPOINT DESIGNER WORKFLOWS.....	2-41
Lab 2 Overview.....	2-42
Create a Document Approval Workflow.....	2-43
WORKING WITH SHAREPOINT DESIGNER AND CUSTOM ASP.NET FORMS	3-1
Pre-Class Installation Instructions	3-2
Working with SharePoint Lists	3-4
Standard List Forms.....	3-4
Modifying Default List Forms	3-10
Creating Custom List Forms	3-11
Creating Custom Applications in SharePoint Designer	3-21
Data View Web Part.....	3-21
Enhancing Data Views with ASP.NET Controls.....	3-38
Fabulous 40 Application Templates.....	3-51
Working with Application and Site Pages	3-52

LAB 3: WORKING WITH SHAREPOINT DESIGNER AND
CUSTOM ASP.NET FORMS.....3-57

 Lab 3 Overview.....3-58

 Create a Custom Data View Application in SharePoint Designer.....3-59

 Customize the SharePoint Application Using ASP.NET Controls3-76

USING INFOPATH FORMS WITH SHAREPOINT4-1

 Pre-Class Installation Instructions4-2

 InfoPath Basics.....4-4

 Components of InfoPath4-4

 Features of InfoPath4-4

 Getting Started with InfoPath.....4-7

 InfoPath Design Tools.....4-9

 Form Preview Feature4-12

 Form Templates.....4-13

 Additional Features of InfoPath4-18

 Form Data Connections.....4-18

 Controls and Template Parts4-18

 Form Libraries.....4-18

 Using Data Connection Libraries.....4-52

 Using InfoPath with Document Information Panels4-54

 Form Publishing Options4-55

 InfoPath Forms Services4-59

 Using InfoPath with Outlook 20074-69

LAB 4: USING INFOPATH FORMS WITH SHAREPOINT.....4-75

 Lab 4 Overview.....4-76

 Create an IT Request Form Using InfoPath4-77

 Publish an Administrator-Approved Form Template.....4-111

 Publish the IT Request Form to Forms Server4-115

CUSTOM WORKFLOWS AND THE SHAREPOINT OBJECT MODEL.....5-1

 SharePoint as a Workflow Platform5-2

 Common Uses and Capabilities.....5-2

 Basic Collaboration Items5-3

 Windows SharePoint Services.....5-3

 Two Types of SharePoint Workflows5-5

 User Interface Options5-5

 SharePoint Workflow Fundamentals5-6

Workflow Templates, Associations, and Instances	5-6
Creating Workflow Templates with Visual Studio	5-6
Workflow Designer	5-7
Creating Workflow Associations	5-12
Workflow Association Objects.....	5-14
Starting a Workflow Instance	5-23
Workflow Initiation Objects.....	5-23
Collecting Data when a Workflow Starts.....	5-28
Using Association and Initiation Data	5-28
The Importance of Association and Initiation via Code.....	5-33
LAB 5: CUSTOM WORKFLOWS AND THE SHAREPOINT OBJECT MODEL.....	5-37
Lab 5 Overview.....	5-38
Associate an Approval Workflow with the Browser.....	5-39
Associate an Approval Workflow with the Object Model.....	5-42
VISUAL STUDIO 2008 WORKFLOW DEVELOPMENT BASICS	6-1
Build Workflows with Windows Workflow Foundation	6-2
Code-Based Workflow Elements	6-2
Binding Properties to Activities	6-2
Flow of Control.....	6-5
Rules and Conditions.....	6-8
Sequential Workflows	6-11
State Machine Workflows	6-19
Faults and Canceled Workflows	6-37
Handling Workflow Exceptions	6-37
Handling Canceled Workflows	6-40
Custom Activities	6-49
LAB 6: VISUAL STUDIO 2008 WORKFLOW DEVELOPMENT BASICS	6-63
Lab 6 Overview.....	6-64
Create a Custom Workflow Activity	6-65
Create a Sequential Workflow with a Custom Activity	6-70
WORKFLOW TASKS	7-1
Task Basics	7-2
Typical Flow	7-2
Task Activities	7-3
Connecting Related Tasks.....	7-13
The Correlation Service	7-14

SharePoint Host Pros and Cons	7-14
Selecting the Appropriate Correlation Token	7-15
Setting OwnerActivityName	7-16
Tasks in State Machine Workflows	7-18
Handling Multiple Tasks	7-33
Using Custom Task Types	7-34
Content Types	7-34
WorkflowTask Type	7-34
Setting the Default Task Type	7-38
CreateTaskWithContentType Activity	7-39
Extracting Type and Field Definitions	7-39
Task Properties	7-40
Reading and Writing Values	7-41
LAB 7: WORKFLOW TASKS	7-53
Lab 7 Overview	7-54
Create a Sequential Workflow with Task Activities	7-55
WORKFLOW FORMS	8-1
Form Basics	8-2
InfoPath and ASP.NET	8-4
InfoPath Workflow Forms versus ASP.NET	
Workflow Forms	8-5
XML Serialization – InfoPath	8-6
XML Serialization – ASP.NET	8-7
Association Forms	8-8
InfoPath Feature XML	8-8
ASP.NET Feature XML	8-10
Initiation Forms	8-35
InfoPath Feature XML	8-35
ASP.NET Feature XML	8-36
Task Forms	8-46
Feature Manifest	8-46
Element Manifest	8-46
Task Properties	8-48
Modification Forms	8-67
Feature Manifest	8-68
Element Manifest	8-68

LAB 8: WORKFLOW FORMS	8-85
Lab 8 Overview	8-86
Prepare the Environment.....	8-87
Examine a Workflow with an ASP.NET Association Form	8-89
Examine a Workflow with an ASP.NET Based Task Form.....	8-103
INDEX.....	INDEX-1