

# Course : SharePoint 2016, workflow design

*Practical course - 2d - 14h00 - Ref. SHF*  
*Price : 1400 CHF E.T.*

In this course, you'll learn how to modify native Workflows inherited from previous versions of SharePoint, as well as how to create new Workflows for SharePoint 2016 with SharePoint Designer and Visio without the need for development. You'll also learn how to customize forms with InfoPath.

## Teaching objectives

At the end of the training, the participant will be able to:

- ✓ Designing a workflow
- ✓ How to use SharePoint Designer for Workflows
- ✓ Understanding tasks and task processes
- ✓ Customizing an InfoPath form

## Intended audience

Functional site administrators, business analysts, developers, or anyone who needs to think about setting up workflows and forms.

## Prerequisites

Knowledge of the use and functional administration of SharePoint 2016 sites, such as the creation of lists and libraries.

## Course schedule

### 1 Getting started with Workflows

- Workflow definition, sequential and stateful workflows.
- What's new in SharePoint 2016 for Workflows, new possibilities.
- Tools for creating workflows: Visual Studio, Visio, SharePoint Designer.
- Native workflows, approval workflows.

#### Hands-on work

Create a three-state workflow and an approval workflow.

#### PARTICIPANTS

Functional site administrators, business analysts, developers, or anyone who needs to think about setting up workflows and forms.

#### PREREQUISITES

Knowledge of the use and functional administration of SharePoint 2016 sites, such as the creation of lists and libraries.

#### TRAINER QUALIFICATIONS

The experts leading the training are specialists in the covered subjects. They have been approved by our instructional teams for both their professional knowledge and their teaching ability, for each course they teach. They have at least five to ten years of experience in their field and hold (or have held) decision-making positions in companies.

#### ASSESSMENT TERMS

The trainer evaluates each participant's academic progress throughout the training using multiple choice, scenarios, hands-on work and more.

Participants also complete a placement test before and after the course to measure the skills they've developed.

## 2 The "SharePoint Designer 2013" tool for SharePoint 2016

- Containers, Conditions, Actions, Navigation.
- Platform operations, versions, instances.
- Local variables, Search, String generator.
- Best practices. Infinite loops. Debugging.

### Hands-on work

Handling basic actions. Using list actions. Understanding an infinite loop. Implement a list join.

## 3 Tasks and task processes

- Task action. Content type. Custom task wizard.
- Task process, task process customization.

### Hands-on work

Task and form action, customized approval workflow.

## 4 Global workflows

- Reusable workflows, Site workflows.
- Customization of native workflows.
- Association of columns. Set of documents.

### Hands-on work

Reusable workflow. Site workflow. Customize native workflow, association columns.

## 5 Workflows of type "SharePoint 2013" for SharePoint 2016

- Differences with previous-generation workflows.
- Management of loops, steps and jumps between steps, Application step.

### Hands-on work

Start a SharePoint workflow. Conditional branching, loop n times.

## 6 External environments

- Visio Professional, Workflow import/export. Integration with SharePoint Designer.
- Role of the visual designer.
- File types, differences between XML files.
- Solution file, WSP file handling.

### Hands-on work

Importing and exporting with Visio. Use the visual designer. Deploy a workflow.

## 7 Customizing an InfoPath form

- Definition and role of an InfoPath form. Form types.
- InfoPath Designer and InfoPath Filler tools.

### Hands-on work

Modify an existing form. Create a new form.

### TEACHING AIDS AND TECHNICAL RESOURCES

- The main teaching aids and instructional methods used in the training are audiovisual aids, documentation and course material, hands-on application exercises and corrected exercises for practical training courses, case studies and coverage of real cases for training seminars.
- At the end of each course or seminar, ORSYS provides participants with a course evaluation questionnaire that is analysed by our instructional teams.
- A check-in sheet for each half-day of attendance is provided at the end of the training, along with a course completion certificate if the trainee attended the entire session.

### TERMS AND DEADLINES

Registration must be completed 24 hours before the start of the training.

### ACCESSIBILITY FOR PEOPLE WITH DISABILITIES

Do you need special accessibility accommodations? Contact Mrs. Fosse, Disability Manager, at psh-accueil@orsys.fr to review your request and its feasibility.

