

# Building Enterprise Solutions with SharePoint Server 2007

COURSE CODE: SAB301

## Duration

4 days (Instructor-led)

## Introduction

This intensive 4-day course explores the Enterprise Content Management (ECM) features of Microsoft Office SharePoint Server 2007 (MOSS). You will learn to identify the specific content patterns that drive business processes, enabling you to build comprehensive solutions that manage all aspects of the ECM lifecycle, including document security, check-in/check-out, information rights management (IRM), official records and holds, and workflow. You will also learn how SharePoint Content Types can encapsulate and extend your own custom content management components, which can then be used to support data gathering via electronic forms (InfoPath 2007), business process automation (Windows Workflow Foundation) and document generation (Open XML).

## Audience

Professional .NET Developers with WSS Fundamentals

## Prerequisites

Attendees should have professional development experience with Visual Studio 2005, the .NET framework and ASP.NET as well as familiarity with Microsoft Office products such as Word and Excel. It is also recommended (but not required) that attendees have a working knowledge of the Windows Workflow Foundation and creating declarative workflows using Microsoft Office SharePoint Designer 2007.

## Course Outline

### **The Enterprise Content Lifecycle**

- Understanding the Enterprise Content lifecycle
- Managing the document creation process using content types and document templates
- Tracking and controlling document editing, check-in, check-out and versioning
- Controlling when and how content is published and consumed
- Using event receivers to manage the content lifecycle

### **Managing Document Metadata**

- Role-based content modeling and effective metadata design
- Extending content types with custom schemas to enforce document integrity
- Strategies for sharing metadata among several document types
- Dealing with changes to metadata after content has been deployed

### **Information Management Policy**

- The SharePoint Information Management Policy Architecture
- Creating and custom policy features and resources
- Using policies to manage the content lifecycle
- Using policies to enforce document integrity

### **Working with Official Records in MOSS**

- General requirements for a records repository
- Implementing typical records management scenarios
- Understanding the Records Center site template
- Defining and setting up record routing types
- Configuring SharePoint for records management

### **Customizing and Extending MOSS Records Management**

- Implementing and deploying custom routers
- Processing official records using the Search and Process API
- Suspending records management policies using holds
- Strategies for deploying multiple repositories
- Implementing the Official File Web Service

### **Web Content Management in MOSS**

- Introduction to Web Content Management in MOSS
- Creating web content on the server and the client
- Setting up and using automatic document conversion
- Managing web content using information policy features
- Building Multi-lingual sites using variations

### **Gathering Data using InfoPath 2007**

- Working with InfoPath form templates
- Managing form data using custom schemas
- Understanding the InfoPath Security Model
- Getting up to speed with InfoPath Forms Services

### **Generating Enterprise Content**

- Introduction to Open XML File formats
- Working with the Microsoft SDK for Open XML
- Generating documents from data stored in SharePoint lists
- Building an extensible framework for content generation in MOSS

### **Managing Content on Client Machines**

- Creating and using Document Information Panels
- Publishing Web Content from Office Client Applications
- Configuring and using Information Rights Management
- Building and deploying custom IRM protectors

### **Understanding Workflow in MOSS**

- Overview of Windows Workflow Foundation and Workflow Markup
- Understanding the MOSS Workflow Lifecycle: Association, Initiation and Completion
- Understanding how workflows are hosted within the MOSS environment
- Working with Workflow Tasks and Workflow History Lists
- Integrating Workflow Forms and Document Metadata

### **Designing Content-Driven Workflow Solutions**

- Content-driven workflow and workflow-generated content
- Working with the MOSS Enterprise ECM workflows
- Designing and building custom activity libraries
- Extending SharePoint Designer 2007 with custom activities
- Coordinating human-based workflows using SharePoint tasks
- Extending client applications using the Workflow Web Service

### **MOSS as an Integrated ECM Platform**

- Integrating Workflow with Records Management
- Integrating Workflow with Client-Side ECM
- Integrating Workflow with Information Management Policy

#### **Contact us**

**For further information or to make a booking please contact us on:**

Telephone: +44 (0) 207 680 9599 | Email: [training@pygmalion.com](mailto:training@pygmalion.com) | [www.pygmalion.com](http://www.pygmalion.com)