
Hosted By

Barrett Blank

Principal

bblank@bb2e.com

www.bb2e.com

(720) 529-5574

SharePoint Designer

A Presentation for the State of Colorado – SharePoint User Group

Presented By

John McClure

Solution Architect

SharePoint Designer

What you need to know about Microsoft SharePoint Designer. Questions answered in this presentation:

- What options do I have to work with SharePoint?
- Who should use SharePoint Designer?
- What can you do with SharePoint Designer?
- How do I create a workflow for SharePoint?
- How do I customize a web page for SharePoint?
- How do I brand my SharePoint site?

Agenda

- Introduction
- Case Studies
- Survey
- About SharePoint Designer
 - Workflows
 - Customizing Pages
 - Branding
- Questions and Answers
- Useful Links
- Wrap Up

Introduction

- Introduce yourself to one new person in the room (5 minutes)
- Who am I?
- What do we do?
- How can we help?

BeInventiv

- Colorado based firm for over 10 years
- Gold Certified Microsoft Partner
 - SharePoint, Dynamics CRM ; Competencies
- Government focus
 - Colorado OIT / Dept. proven successes
 - Data management and reporting focus
- Proven ‘Sure Step’ process for delivering success
- Local resources for knowledge transfer / mentoring

National Renewable Energy Laboratory

Delivered | Developed custom look-and-feel for 1 intranet site and 2 extranet sites. A total of three master pages, multiple page layouts, and custom CSS.

Client Portal Site - clientportal.com - Windows Internet Explorer
http://thepoint.nrel.gov

Welcome User | Site Actions

NREL

NATIONAL RENEWABLE ENERGY LABORATORY

Your collaboration resource for managing projects.

My Sites

Below are the SharePoint sites that you belong to. If you need to be removed from a site or added to a site, please contact SPSupport@nrel.gov.

- Site Name 1
- Site Name 2
- Site Name 3
- Site Name 4
- Site Name 5
- Site Name 6
- Site Name 7

Request New Users

Request New Users

Request New Users

FAQ

FAQ

Disclaimer

Disclaimer

End User License

End User License

About Us

About Us

NREL is the only federal laboratory dedicated to the research, development, commercialization and deployment of renewable energy and energy efficiency technologies. Backed by 32 years of achievement, NREL leads the way in helping meet the growing demand for clean energy.

[learn more >](#)

www.NREL.GOV | Privacy Policy | Aliquam Sed Libero | Tristique Nec Erna | Interdum Aliquam
© 2010 Lorem Ipsum | NREL. All rights reserved.

Case Study

NREL

Client Portal Site - clientportal.com - Windows Internet Explorer
http://www.clientportal.com

Welcome User | My Site | My Links | Site Actions

Department of Homeland Security | Homeland Security

All Sites

EPIC Home | Teams | OPO News | Reports | Dashboard | Training | Friday, September 18, 2009

EPIC Home

- Functional Areas
 - Sub Link 1
 - Sub Link 2
- CO Toolkit
- PM Toolkit
- COTR Toolkit

ESSENTIAL TOOLS

DIGS | OAS | C | TW | TPLS | FRES | TEDO GOV

POLICY LINKS

- FAIR
- HSAM (PDF Version)
- HSAR (HTML Version)

RSS FEEDS

- New road closures for police activity: 23rd St. from G to I St.; and I St. from 21-23rd Sts. NW
- Foggy Bottom station is temporarily closed due to a report of a suspicious package outside the station
- Disruption system-wide.
- Until further notice, all trains are stopping when the front of the train reaches the end of the platform.

EPIC Home

PACTS Awards

Your colleagues in DOAD did it!! I am pleased to announce the award of 27 contracts for Functional Category 2 (Administrative), 3 (Clerical), and 4 (Technical) of the Program Management, Administrative, Clerical, and Technical Services (PACTS) program.

Posted August 6, 2009 [Read more](#)

About Our Team | Employee Community Center | For Our Customers | OPO's DHS-Wide Contracts | Navigating EPIC

Announcements

DLA Cut-off for Congressional Notification 9/22/2009 8:18 PM by Soraya Cornea

Please be reminded that tomorrow is the FINAL day for submission of congressional notifications for FY 2009 awards. Also, please be reminded that Saturday, September 26, 2009, is the last day for FY 2009 funded or other expiring fund actions to be awarded per my instructions. If you have actions funded with FY 2009 or other expiring funds that are to be awarded after that date, your Director/Contractor must obtain my written approval prior to award.

Add new announcement

Upcoming Events

PRISM - Approver/Reviewer	City, State	9/18/2009 1:00PM
PFDS-ND	City, State	9/17/2009 10:00AM

Add new item

Recent Blog Posts

Blog Post Title Sample 1	posted by NAME	Blog Name	9/18/2009
Blog Post Title Sample 2	posted by NAME	Blog Name	9/17/2009
Blog Post Title Sample 3	posted by NAME	Blog Name	9/17/2009
Blog Post Title Sample 4	posted by NAME	Blog Name	9/16/2009
Blog Post Title Sample 5	posted by NAME	Blog Name	9/15/2009
Blog Post Title Sample 6	posted by NAME	Blog Name	9/15/2009

EPIC Home | Teams | Community | Training | ERA | Site Map

© 2009 Department of Homeland Security. All rights reserved.

Case Study

Homeland Security

Boulder Valley School District (BVSD) consisting of 55 schools serving 11 Colorado communities.

<http://bvsd.org>

Delivered | Designed original site design, multiple master pages & multiple CSS files to change look and feel of site depending on section of site with rotating image includes for company internet and portal sites.

The screenshot displays the Boulder Valley School District website. At the top, there is a navigation bar with links for 'New to BVSD?', 'About BVSD', 'Jobs @ BVSD', 'Schools', 'Contact Us', 'BVSD A-Z', and 'Quick Links'. A search bar and a 'Site Actions' button are also present. The main content area is divided into several sections: a large banner with the BVSD logo and the slogan 'Home of the New Century Graduate'; a 'School Alerts' section with a recent alert about a 20" snowfall; a 'BVSD News' section with a recent article about the district's charter; a 'District Calendar' section listing school closure dates; and a 'Superintendent's Corner' section with a recent post by the superintendent. There are also sections for 'Links' and 'Students', 'Parents', 'Community', and 'Employees'. The footer contains the district's address and contact information.

Case Study

Boulder Valley Schools

Weatherization Portal Welcome Inventiv | My Site | My Links | ?

Region 4 All Sites

Weatherization Portal | Document Center | Reports | Search | Wx Outreach | Resources | Outreach | Training | **Site Actions**

View All Site Content

Documents

- Shared Documents

Lists

- Calendar
- R4 Auditor Inspector

LEAP Clients

- 09-10 LEAP List

GEO Reporting

- PY 10-11 (Jul-Sep) Measure Report
- PY10-11 (Jul-Dec) Measure Report
- PY 10-11 (Jul-Feb) Measure Report

ARRA Reporting

- Sub-Grantee Info
- Vendors

Weatherization Portal > Regions > Region 4

Housing Resources of Western CO

Housing Resources of Western CO ▾

Welcome to the Region 4, HRWC, portal...

LEAP

- Create a Client in the Queue from the 09-10 LEAP List
- View/Print TOPSHEET from the 10-11 LEAP List

QUEUE

- Create a Client in the Queue (Not a LEAP Client)
- Manage/ Edit Existing Clients in the Queue

JOBS

- Create a New Job from Queue Client
- Manage/Edit Existing Jobs


CALL-BACK OR GO BACK

- Report a Call Back or Go Back
- View/Print Call Backs/Go Backs

MONTHLY FISCAL REPOTING

- Enter Monthly Fiscal Reporting for ARRA & Standard Allocation
- View/Print Fiscals

REBATES



Links ▾

- Enter Jobs
- Add new link

Case Study

Governor's Energy Office
Weatherization Program

Survey

- Have you/are you using SharePoint 2007?
- Have you/are you using SharePoint 2010?
- Have you created a list in SharePoint?
- Have you created a site in SharePoint?
- Are you using SharePoint Designer?
- Are you using InfoPath?
- Are you using Groove/Workspaces?
- Are you using Workflows?
- Have you branded your SharePoint site?

About SharePoint Designer

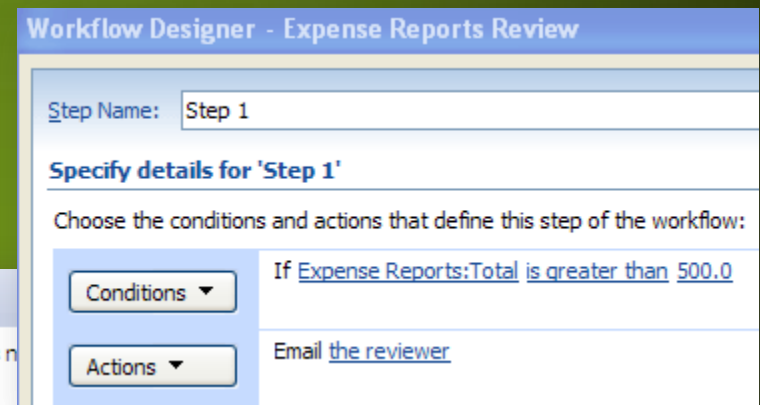
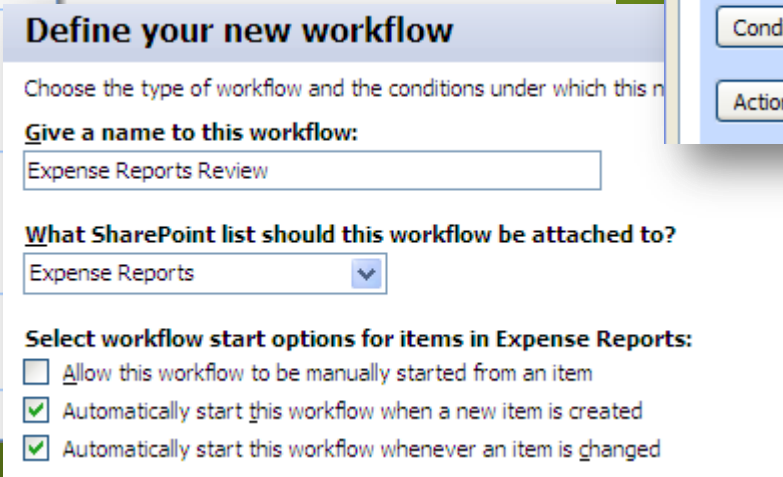
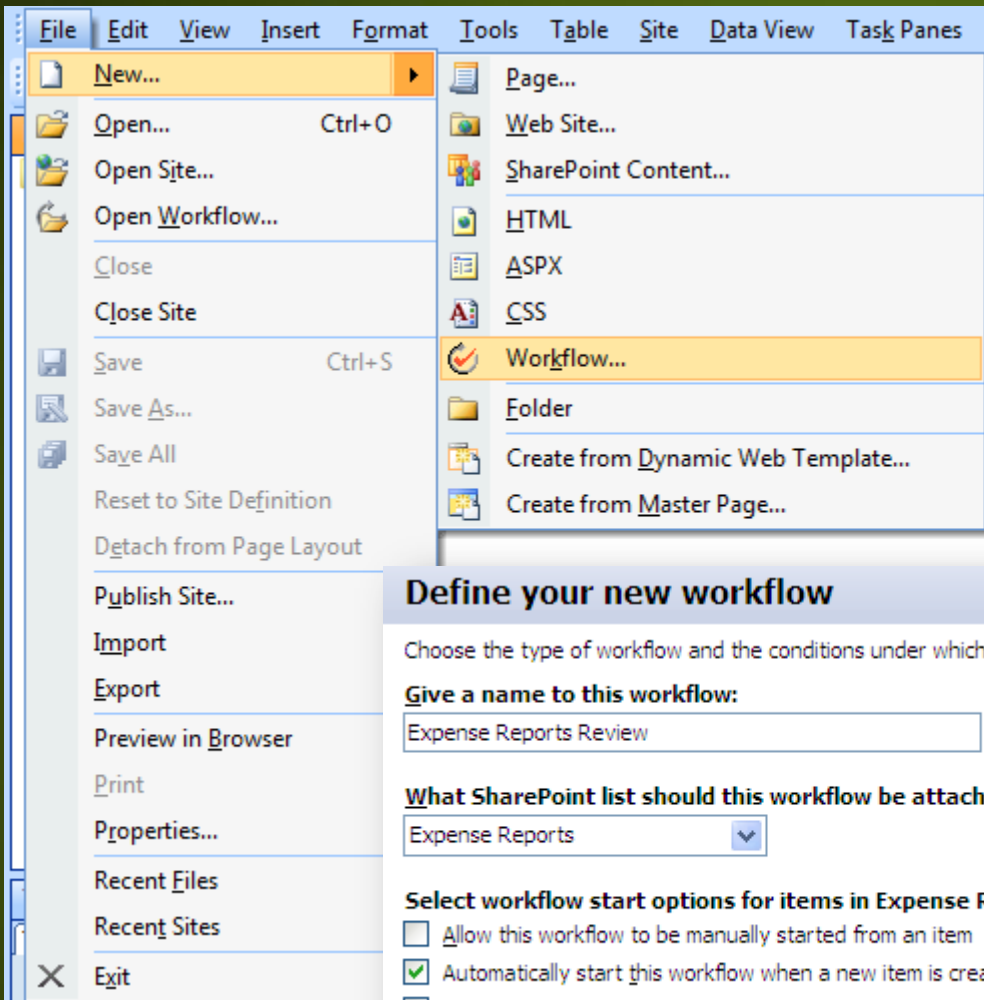
- What options do I have to customize SharePoint?
 - Through Web Client
 - Through SharePoint Designer
 - Through Visual Studio
- Who should use SharePoint Designer?
 - User who are comfortable with HTML
 - User who understand the business processes/logic

About SharePoint Designer

- What can I do with SharePoint Designer?
 - Create and customize workflows
 - Create and customize web pages & web parts
 - Brand and stylize a SharePoint site
 - Integrate data from other systems with the Business Data Catalog*

Workflows

- What types of Workflows can I create?
 - Prefined Workflows
 - SharePoint Designer Workflows
 - Custom Workflows (Visual Studio)
- What are the limits to the SharePoint Designer Workflows?
 - Single-Use Workflows



Demo - Workflows

Expense Report Example

<http://office.microsoft.com/en-us/sharepoint-designer-help/workflow-example-route-an-expense-report-for-review-HA010182909.aspx>

Customize a Web Page

- What can you customize in SharePoint Designer?
 - Logos and Images, where they are placed
 - HTML Content
 - CSS Styles
 - Page Theme
 - Web Part Layout, Styles and Zones
 - Web Part Connections

Web Part Connections Wizard

ProductName		UnitsInStock	UnitsOnOrder	ReorderLevel
Chai	order	39	0	10
Chang	order	17	40	25
Aniseed Syrup	order	13	70	25
Chef Anton's Cajun Seasoning	order	53	0	0
Chef Anton's Gumbo Mix	order	0	0	0

CompanyName: Exotic Liquids
ContactName: Charlotte Cooper
Country: UK
Phone: (171) 555-2222

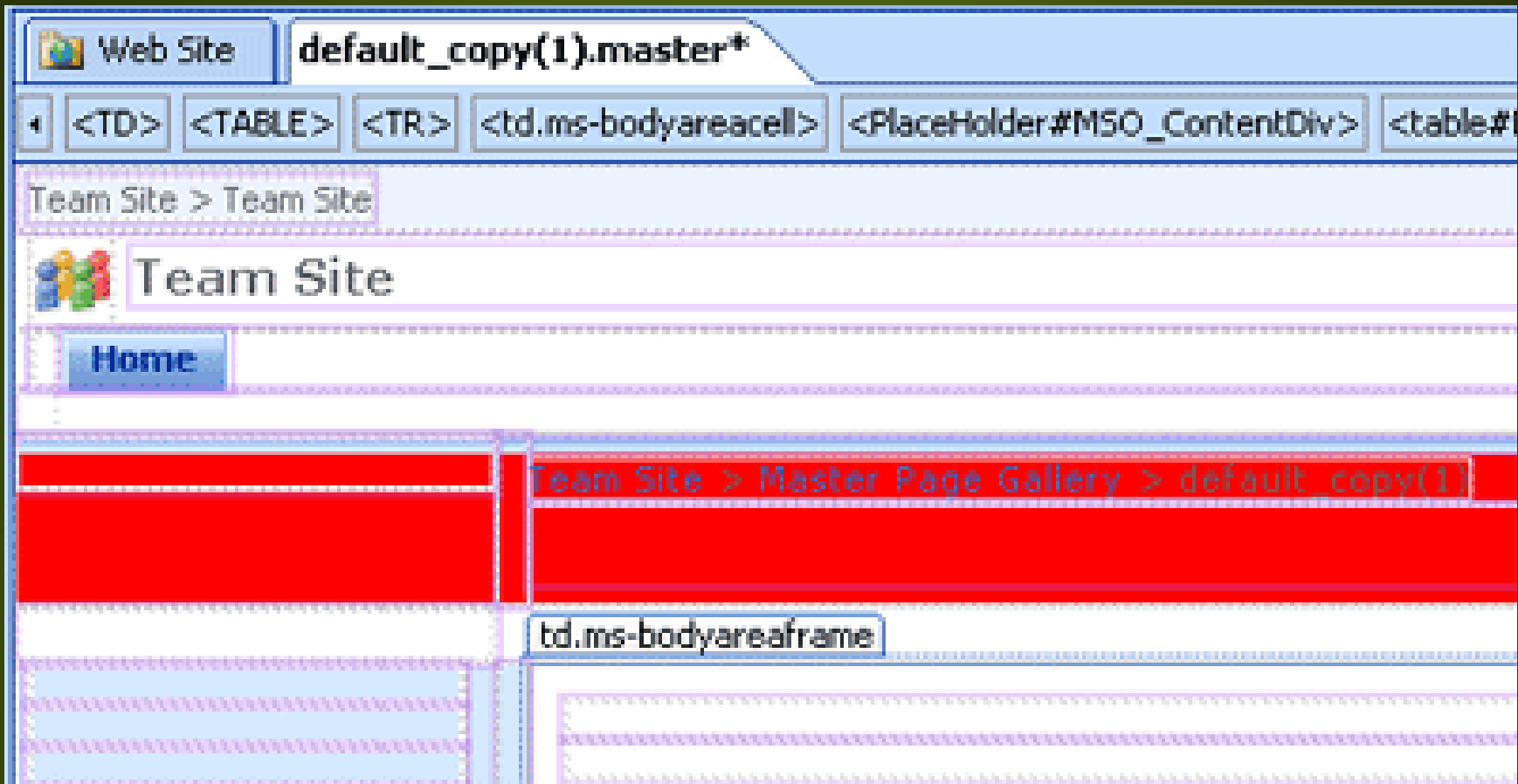
Demo – Customize a Page

Connect two Data Views Example

<http://office.microsoft.com/en-us/sharepoint-designer-help/connect-two-data-views-HA010169133.aspx>

Branding your Site

- Customizing a Master Page
- Branding for Anonymous Access (Public Internet)



Demo – Branding your Site

Modify Default.master Example

<http://office.microsoft.com/en-us/sharepoint-designer-help/modify-the-default-master-page-HA010100906.aspx>

BEINVENTIV

BB2e

Questions & Answers

How can we help?

info@bb2e.com

Useful Links

- **Download SharePoint Designer 2007**
<http://www.microsoft.com/downloads/en/details.aspx?FamilyID=BAA3AD86-BFC1-4BD4-9812-D9E710D44F42&displaylang=en>
- **Microsoft Office Help for SharePoint Designer**
<http://office.microsoft.com/en-us/sharepoint-designer-help/>
- **Types of SharePoint Workflows**
[http://technet.microsoft.com/en-us/library/cc531335\(office.12\).aspx](http://technet.microsoft.com/en-us/library/cc531335(office.12).aspx)
- **Create SharePoint Designer Workflows**
[http://technet.microsoft.com/en-us/library/cc514193\(office.12\).aspx](http://technet.microsoft.com/en-us/library/cc514193(office.12).aspx)
- **Office SharePoint Designer 2007 Training**
<http://www.microsoft.com/download/en/details.aspx?id=214>
- **Need Help Now? Want this Presentation?**
Email us at sharepoint@beinventiv.com

Contact

Barrett Blank**Principal****bblank@bb2e.com****www.bb2e.com****(720) 529-5574**

- Colorado based firm for 10 years
- Gold Certified Microsoft Partner
 - SharePoint, Dynamics CRM ; Competencies
- Government focus
 - Colorado OIT / Dept. proven successes
 - Data management and reporting focus
- Proven ‘Sure Step’ process for delivering success
- Local resources for knowledge transfer / mentoring