

Building business applications in SharePoint

HR Case Study

Presented by: Jim Brocato
jmb@tcsc.com
Managing Consultant, TCSC

What this covers and Why

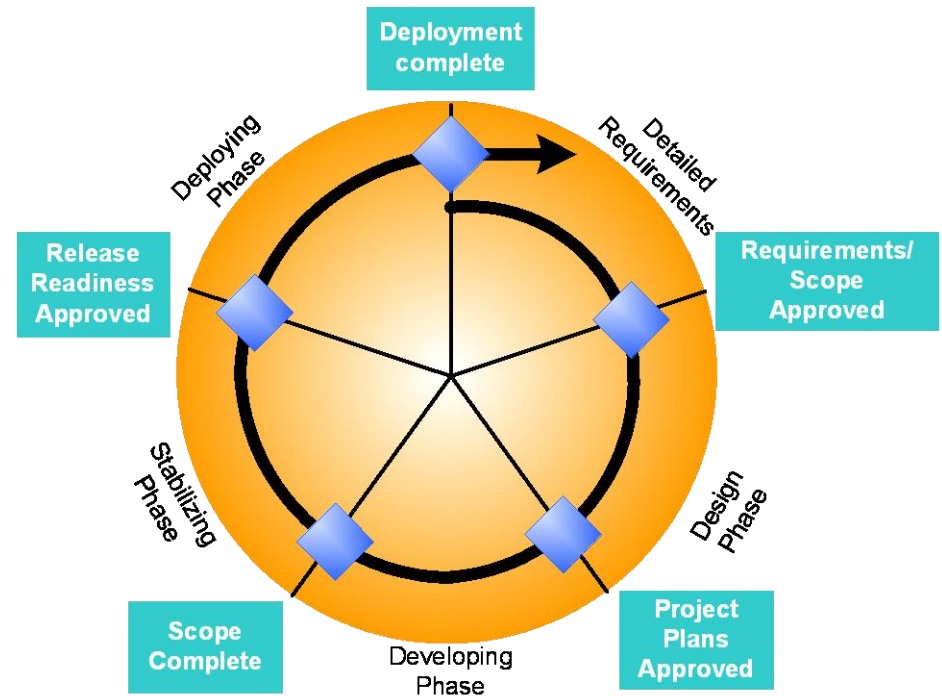


- Walk through building a business application in SP. (New Employee Onboarding)
- Intent: demo how basic business analysis skills + SharePoint knowledge = big wins for your team.
- Why? many of you are at this stage right now, i.e. intranet done, team sites done, now what?
- Development in SharePoint...

Steps



- Problem Definition
- Analysis
- Design
- Construction
- Review
- Revisions & Testing
- Delivery



Meet with the customer



- Ask about pain points or shortcomings. Do not just ask “what else can SharePoint do for you?”
- Ask what has been tried before
- Get them to discuss their goals and requirements
- Make sure you get the entire picture
- Determine how particular they would be about how a solution looks/functions/integrates/etc.

Our Scenario:



- Human Resources is not satisfied with their onboarding process for new employees. The current process is manual and informal.
- Problems:
 - Takes too long to inprocess
 - Lots of new employees fall through the cracks
 - No way to track current status of onboarding
 - New employees feel lost
 - Surveys show that most employees start off with a negative impression of the company

Analysis



Is this a “process automation” or “process facilitation” problem?

PROCESS AUTOMATION

- If process is simple
- If process is well defined and well established
- If rules are solid
- If users are not “tool oriented”

PROCESS FACILITATION

- If process is complex
- If process does not exist or is immature
- If rules are often broken
- If users don't know what they want

Analysis



- What aspects are/are not suitable for automation?
- Are there any existing systems that will interact with this one?
- Define Key Roles
 - HR Onboarding Admins
 - HR Orientation Leaders
 - Managers
 - New Employees

Analysis



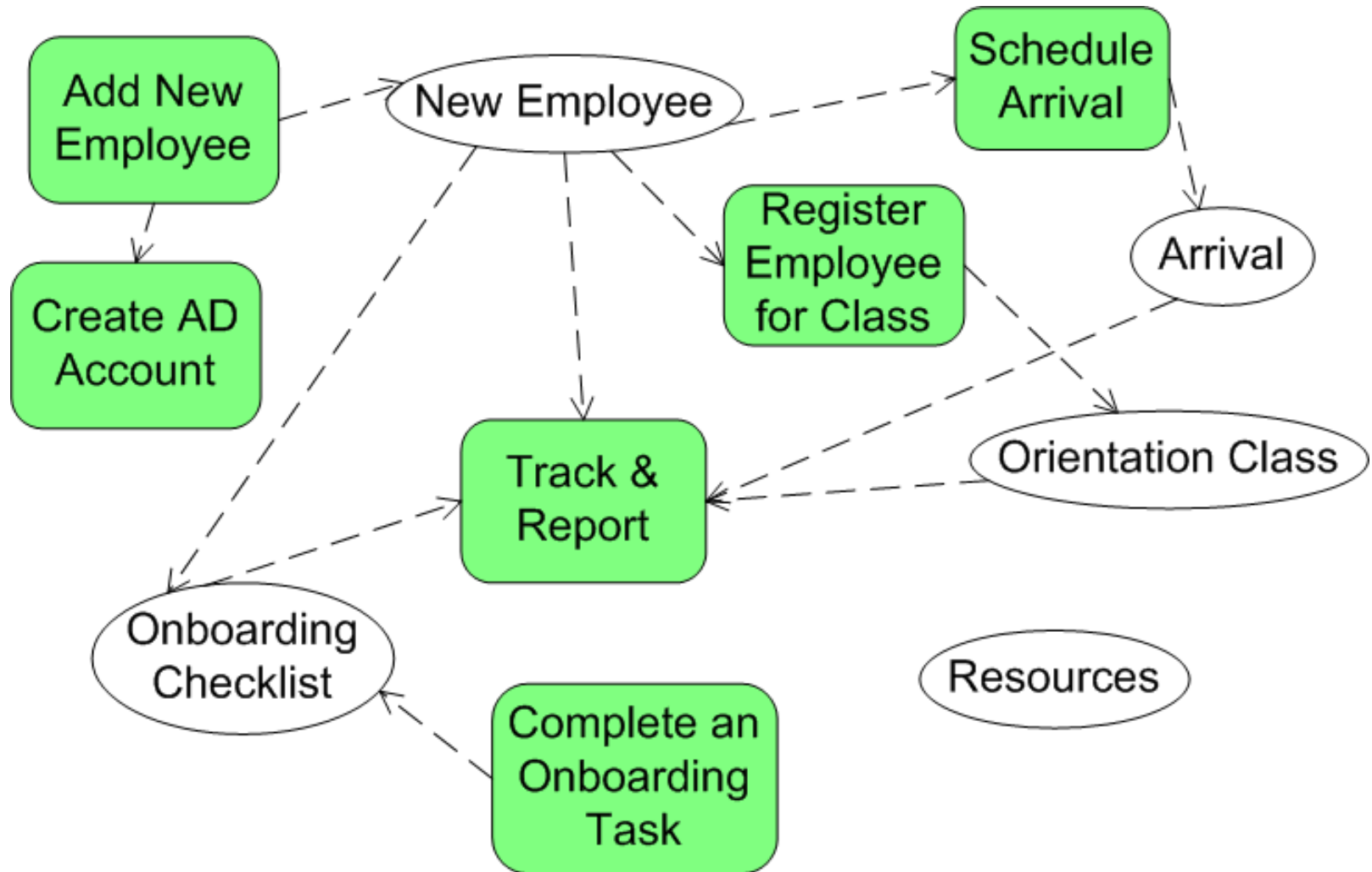
- Define Key Functionality (by role)
 - HR Onboarding Admins:
 - Enter New Employee
 - Schedule Orientation
 - Track Onboarding Progress
 - HR Orientation Leaders
 - Plan Orientation Classes
 - Assist New Employees with Onboarding
 - Managers
 - Welcome New Employees
 - New Employees
 - Complete all Onboarding Tasks (vary by employment type)

Analysis

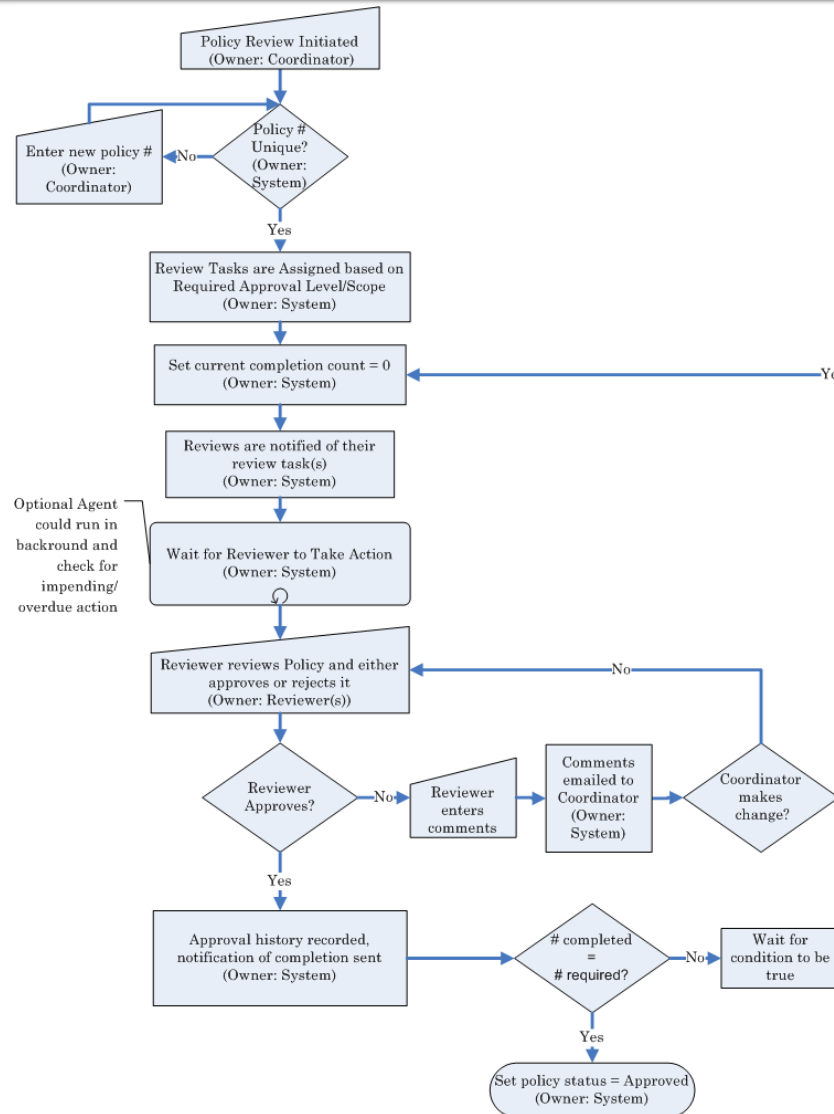


- Key Requirements:
 - New employee AD accounts must be created before they arrive
 - Need to account for fluid arrival dates
 - Need to notify IT & Finance of their tasks
 - Need to assign onboarding tasks based on type of employment
 - Need to know who is behind schedule
 - Need to keep managers in the loop
 - Maintain role based security

Conceptual Design



Sample Process Flow

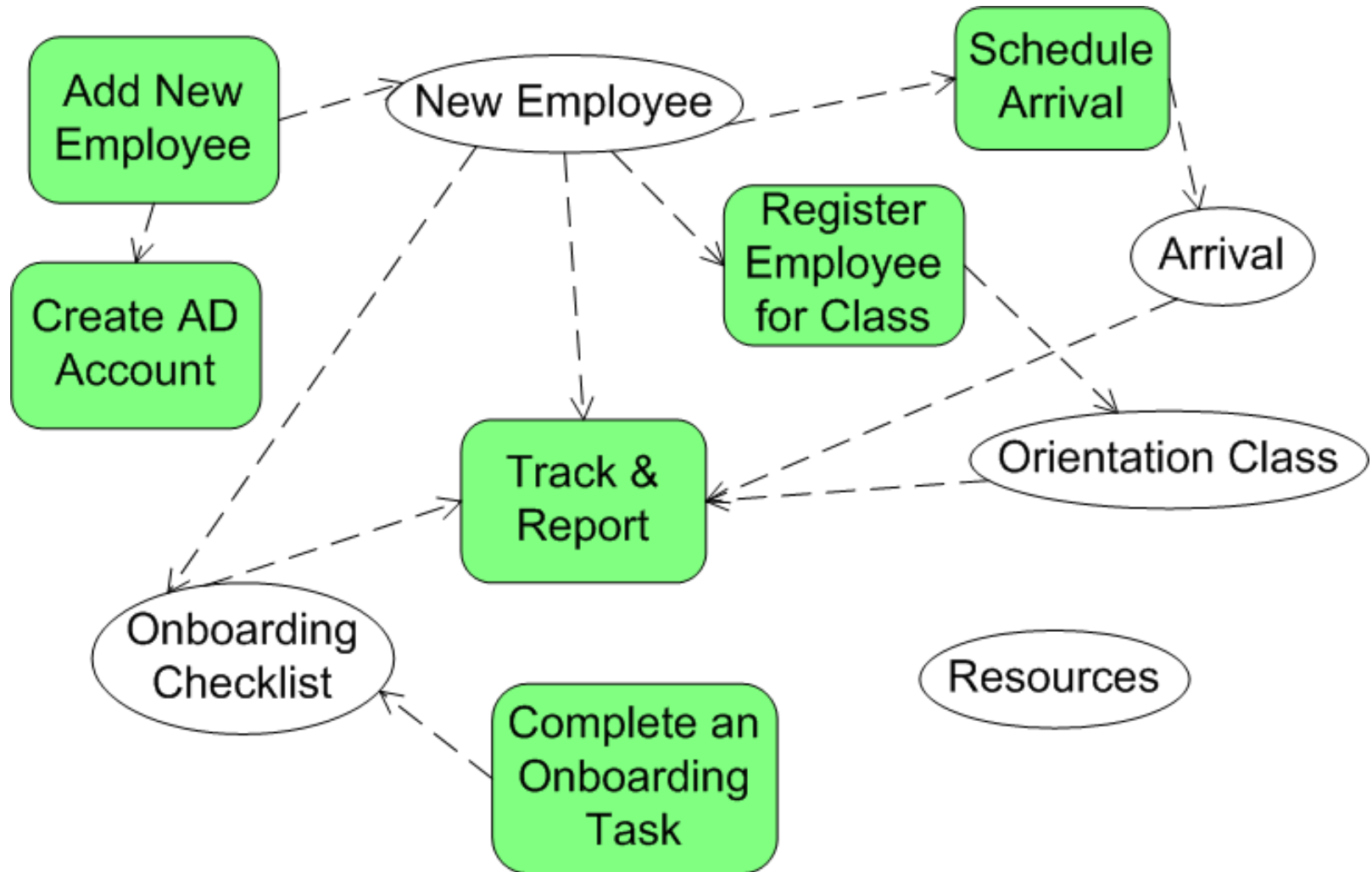


Map to SharePoint Objects

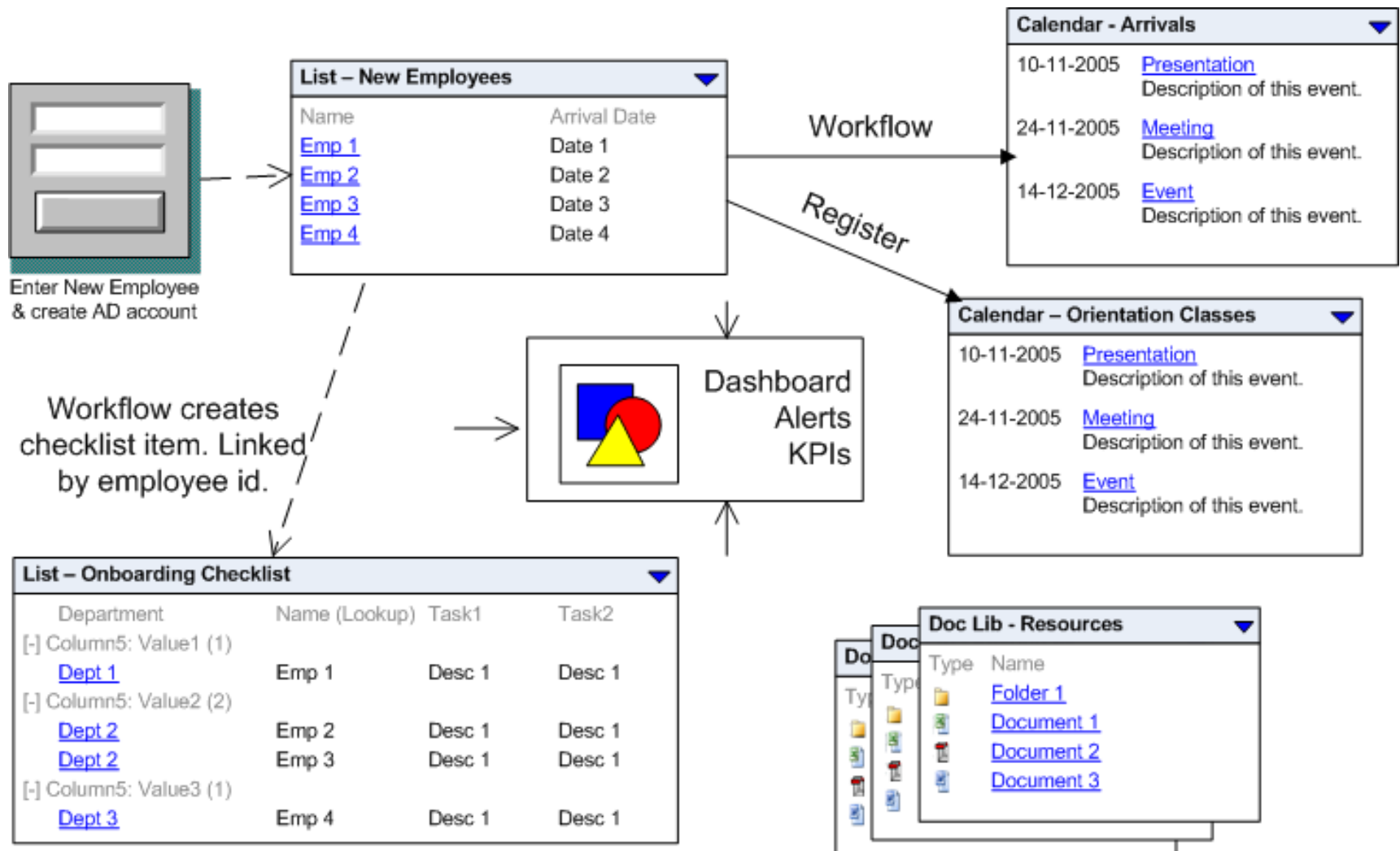


- Lists:
 - Correspond to entities / data tables
 - Use Lookup fields to link lists
- Alerts
- Workflows
 - Get approval, route documents, manage state/status
 - Copy data from list to list, field to field
- Data Views
 - Flexible formatting, including conditional formatting
 - Single / Multi-item forms/views
- Web Part Pages
 - KPI lists and KPI web part
 - Connected list web parts
 - Excel Services
 - Content Query

Conceptual Design...



Functional Design




List Detail Planning



- Fields
 - Name
 - Type (Lookup, Calculated, etc.)
 - Where data comes from (manual entry, form, workflow, etc)
- Workflows
- Views
 - Name
 - Fields
 - Filter
 - Sort
 - Style

[Close](#)

[New Item](#) | [Edit Item](#) | [Delete Item](#) | [Alert Me](#) |

Picture: 

Name: Janet Hare
Function: Function
Birth date: 01-01-1980
Civil status: Married
Education: Education
Hobbies: Hobbies
Expectations: Short story about expectations. Short story about expectations. Short story about expectations. Short story about expectations. Short story about expectations.

Created at 12/20/2005 11:09 by [Jane Doyle](#)
Last modified at 1/17/2006 8:57 by [Jane Doyle](#)

[Close](#)

Demo



- Onboarding Functionality
 - By Role
 - By Page
- Dataviews
- Workflows
- Security

Demo



- Techniques:
 - Parent – Child pages
 - Convert list view to xslt view and do conditional formatting
 - Use single item view/forms and Custom List forms
 - Setting permissions via workflow

Resources



- <http://stackoverflow.com/questions/360216/sharepoint-conditional-fields-in-edit-aspx>
- <http://blogs.msdn.com/sharepointdesigner/archive/2008/02/25/filtering-and-formatting-with-date-values.aspx>
- <http://www.sharepoint-tips.com/2007/05/sharepoint-designer-article-2-creating.html>

Resources



```
<xsl:choose>
  <xsl:when test="ddwrt:IfHasRights(2048)">
    <SharePoint:FormField runat="server" id="ff12{$Pos}" ControlMode="Edit" FieldName="WorkState" ItemId="{@ID}"
__designer:bind="{ddwrt:DataBind('u',concat('ff12',$Pos),'Value','ValueChanged','ID',ddwrt:EscapeDelims(string(@ID)),'@WorkState')}"/>
    <SharePoint:FieldDescription runat="server" id="ff12description{$Pos}" FieldName="WorkState" ControlMode="Edit"/>
  </xsl:when>
  <xsl:otherwise>
    <xsl:value-of select="@Title"></xsl:value-of>
  </xsl:otherwise>
</xsl:choose>
```