



ICS Solutions

## SharePoint Adoption Framework

Driving SharePoint adoption by empowering business users

# SharePoint 2007 Train the Trainer course

**Duration: 5 days**

### Overview:

This class combines Combined Knowledge's "Site Member", "Site Owner" and Site Collection courses to provide a comprehensive training program for power end users that would also like to learn how to teach the Mindsharp and Combined Knowledge End User course material internally. This course presents thorough coverage from the ground up about how to use, operate, and build sites in a Microsoft Office SharePoint Server 2007 (MOSS 2007) environment. Students first learn about site navigation and data storage and retrieval through Instructor-led modules covering topics such as search and effective use of lists and libraries. Building on this foundation, students dive deeper into site administration, learning how to create and manage sites, lists, libraries, views and workflows. Security and rights administration are also covered. Functional concepts and best practices are interwoven into the modules to provide a framework for the topics. *\*Note - This course is oriented to Microsoft Office SharePoint Server, but is also applicable to Windows SharePoint Services 3.0.* During the Train the Trainer course We will go through each course with the intent of learning SharePoint, best teaching practices, learn the scope and vision of each, and be equipped with a broader knowledgebase of the courses. A participant in this Train the Trainer should have introductory to intermediate technical level experience and knowledge with SharePoint Technologies and should be accustomed to teaching in the classroom and learning new material with a view to teaching it.

**Site Licenses - The SharePoint 2007 Accelerated Power End User and Train the Trainer course teach delegates how to deliver our End User courses internally using the Mind sharp End User course material. Therefore this course will only be relevant to organizations that have purchased the Site Licenses (electronic course manuals).**

Site Licenses are electronic course manuals that can be modified to reflect your own portal images and corporate style, thus creating a familiar learning environment for your delegates. The Site Licenses can be purchased in various amounts depending on your requirements, they can then be printed for you to use as and when you require. The licenses can also be uploaded onto your internal portal to act as useful reference guides for your delegates. The licenses may only be purchased to train your own internal delegates. For the 2007 Courses, you will need to purchase a site license for SharePoint 2007 Member and a Site License for SharePoint 2007 Owner if you wanted to purchase the full end user course as these are separate courses that create the End User course. The licenses can also be purchased individually depending on how many Members and/or Site Owners you wish to train. Samples of the Site licenses as the pricing structure is available on request.

**Purpose:**

This course is designed to provide to students with a practical understanding of the use, creation, and overall management of MOSS 2007 sites and site collections. Students attending this course learn how to effectively navigate and contribute content within the framework of a collaborative environment. Advancing from these topics, students learn to build and manage sites and site collections. The course content is grounded on best practice conventions that lend to the efficient consumption and maintenance of a MOSS 2007 environment.

**Prerequisites:**

Students taking this course should have the prerequisite knowledge or experience listed below.

- Basic knowledge of Microsoft Office 2007 products
- Be familiar with Internet Explorer
- Familiarity with MOSS 2007 technologies

**Audience:**

The course is designed for those who intend to utilize sites, build and manage sites, and oversee site collections in a MOSS 2007 environment. Individuals in the job categories listed below will benefit from the knowledge and skills gained in this course.

- MOSS 2007 users who are responsible for managing sites or site components such as lists and libraries.
- MOSS 2007 site collection administrators responsible for management of one or more site collections.
- Experienced MOSS 2007 site owners who want to learn more about the site collection options that can be used to enhance the sites they manage.
- Help Desk personnel who provide support to end users that use or manage MOSS 2007 sites.

**Module 1: Introduction to Microsoft Office SharePoint Server 2007**

This module highlights the uses and benefits of MOSS 2007. Navigational components, alerts, and personalization are reviewed and demonstrated. In addition, terminology used throughout the course is defined in this module. The following topics are also covered:

- Overview of MOSS 2007
- Get Started Using MOSS 2007
- Search for Content
- Use Alerts
- Welcome User Links
- Personalize MOSS 2007 Page

**Module 2: Introduction to Site Owner Administration**

This module provides insight into the structure of a site collection and highlights site owner responsibilities. Analysis and differentiation of basic pages, Web Part pages, and sub-sites provide students with awareness of the function and potential uses of each component. The following lessons are covered:

- Introduction to Site Administration
- Understanding Site Collection Components
- Review of Site Owner Roles and Responsibilities

### **Module 3: Work with Lists**

Lists serve as the structure for calendars, discussion boards, contacts, and tasks in MOSS 2007. This module explains the concept of lists, and then reviews popular out-of-the-box options. The operative differences of each option are highlighted through Instructor-led demonstrations. Students learn effective ways to use and contribute to lists. Demonstrations of filters and views highlight usability and efficiency. The following topics are also covered:

- How to Add and Modify Content
- Overview of Default Lists and List Templates
- Add, Modify, and Delete Content in MOSS 2007 Lists
- Sort and Filter Content
- Advanced List Features
- Use Default and Custom Views
- Connect a List to Microsoft Outlook

### **Module 4: Work with Document Libraries**

Document sharing is a primary function of collaborative sites. In this module, libraries are defined and their use is highlighted through Instructor-led demonstrations. Analysis of metadata breaks down the fundamental purpose and function of this important component. Additionally, a how-to review of workflows provides insight into how to use of this popular efficiency tool. The following topics are also covered:

- Overview of Document Libraries
- Create and Upload Documents
- View and Edit Documents and Document Properties
- Document Management Features
- Use Workflows in a Document Library

### **Module 5: Create and Manage Lists and Libraries**

Maintenance and creation of lists and libraries are one of the site owner's primary responsibilities. Well constructed lists and libraries save users time and frustration, which translates to an effective gain for organizations. This module covers elements such as views and metadata that are fundamental to this construction. Versioning and other library settings that can serve to enhance a list or library are also taught in this module. The following lessons are covered:

- Create Lists and Libraries
- Manage List and Library settings
- Create and Manage Site Columns
- Create and Manage Views

### **Module 6: Use Collaborative Sites**

In this module students learn how to use and create workspaces. Explanation and differentiation of wikis and blogs help students understand the format and function of each type of workspace. Instructor-led demonstrations provide additional information on how to effectively use these communication tools. The following topics are also covered:

- Document Workspaces
- Meeting Workspaces
- Wiki Sites
- Blog Sites

### **Module 7: Create Sites and Web Pages**

Fundamentally, site collections are composed of sites, basic pages, and Web Part pages. In this module students create each of these components to develop an enhanced understanding of each item's function and appropriate use. The following lessons are covered:

- Create New Sites
- Create Basic Pages and Web Part Pages

### **Module 8: Manage the Look and Feel of Sites**

In this lesson site owners learn how to customize navigational settings, site descriptors, and themes. This module also focuses on the creation and use of templates, which are a significant time saving utility. The following lessons also are covered:

- Customize Site Title, Description, and Icon
- Configure Navigation Settings
- Left Navigation Panel Options
- Apply Site Themes
- Create Site Templates

### **Module 9: Customize Sites Using Web Parts**

Web Parts are used to focus site content. In this module students learn how to apply and manage Web Parts in a manner that promotes site usability. This module also includes Instructor-led demonstrations on adding and removing Web Parts and modifying Web Part display settings. This module also provides an overview of Web Parts that allow content targeting. The following lessons are covered:

- Introduction to Web Parts
- Add, Close, and Delete Web Parts
- Customize Web Part Properties
- Target Content with Web Parts

### **Module 10: Site Administration**

This module provides insights into the site tools available through Site Administration. Usage reports, user alerts, features, and regional setting options are among the topics covered. Coverage includes an emphasis on function and the appropriate use of these tools. The following lessons are covered:

- Introduction to Site Administration Settings
- Manage Regional Settings
- View Site Usage Data
- Manage User Alerts
- Manage RSS Usage
- Manage Sites and Workspaces
- Site Features

### **Module 11: Manage Galleries**

MOSS 2007 galleries allow site owners to store and manage template structures for components such as sites, lists, content types, and site columns. Use of these templates can save significant administrative overhead. Students learn to define, create, and apply these templates. The following lessons are also covered:

- Use and Creation of Site Content Types
- Application of Site Columns
- Creation and Use of Site Templates
- Review of Web Part, Workflow, and Master Page Galleries

### **Module 12: Manage Workflows**

Workflows are a powerful efficiency tool that can be used to organize and track process driven tasks. In this course, application and customization of these workflows is demonstrated using realworld examples. Students are given the opportunity to build workflows and track workflow tasks. The following lessons are covered:

- Overview of Workflows
- Workflow Administration
- Build Custom Workflows

### **Module 13: Introduction to Site Collections**

This module provides an overview of what is covered in the next section of this course, and then briefly covers the following topics:

- Site Collection Administrative Tools
- Overview of Site Collection Modules

### **Module 14: Site Collection Policies**

Policies are an effective management tool that supports efficient content management and use. Configuration of policies at the site collection level allows more overall control and reduced administrative overhead. In this module students discover options for configuring and managing policies that can be reused and applied throughout a site collection. The following lessons are covered:

- Introduction to Site Collection Policies
- Create Site Collection Policies
- Apply Site Collection Policies
- Export and Import Site Collection Policies
- Modify Site Collection Policies

### **Module 15: Site Collection Search Options**

Efficient access to content is a critical component of an effective, usable collaborative environment. This module walks students through configurable search options. The primary focus is on developing an environment that supports efficient content access and “findability.” The following lessons are covered:

- Introduction to Search
- Manage Search Settings
- Create and Manage Search Scopes
- Keywords and Best Bets
- Search Centre Sites

### **Module 16: Site Collection Options**

This module details several important administrative controls with cross-site capabilities. Coverage includes some of the most commonly used site collection Administrative Tools. Knowledge of these tools is critical to the effective administration of any SharePoint environment. In this module also covers:

- Site Collection Recycle Bin
- Site Directory
- Maintain Sites in the Site Collection
- Connect Site Collection to a Portal Site
- Audit Settings for Site Collections
- Audit Reports

### **Module 17: Site Collection Features**

Advancements to the Features utility provide easy control for the addition or removal of site functionality. This module also reviews the purpose of site collection Features, concentrating on use and affects of their application. The following lessons are covered:

- Introduction to Features
- Site Collection Features Defined
- Activate and Deactivate Features

