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SharePoint 2010 for Site Owners

This five-day course is designed to provide SharePoint Site Owners and Business Users the skills necessary to support a site or site collection in Microsoft SharePoint Server 2010. Topics include designing, implementing, and deploying line of business solutions, sites, workflows, lists and libraries, as well as personalization features and collaboration solutions.

At Course Completion

At course completion the students will be able to:
- Create Sites and Subsites
- Create and implement custom site templates
- Create and manage lists
- Create and manage libraries
- Create and manage workflows
- Create and manage site users and permissions
- Manage pages and Web parts
- Create and manage collaboration sites

Prerequisites

This course is intended for SharePoint Site Administrators, Line of Business owners, managers and power users responsible for managing team, collaboration, workflow and information repositories within the context of Microsoft SharePoint Server 2010.

Students should meet the following prerequisites:
- A generalized knowledge of managed business processes
- An understanding of Web site organization
- Working knowledge of Windows operating systems
- Working knowledge of Microsoft Office products

The course materials, lectures, and lab exercises are in English. To benefit fully from our instruction, students need a solid understanding of the English language and completion of the prerequisites.

Course Materials
SharePoint 2010 User's Guide
Student Lab Manual

Course Outline

Chapter 1: Introduction to SharePoint Technologies
- What Is Microsoft SharePoint 2010?
- Uncovering the Evolution of SharePoint
- Exploring What's New in SharePoint 2010
- Understanding the Value of SharePoint 2010
- Knowing the Building Blocks

Chapter 2: Sites
- Understanding Sites
- Understanding Site Layouts
  - Using Team Sites, Document Workspaces, and Group Work Sites
  - Using Meeting Workspaces
  - Using Blog Sites
- Navigating Sites
  - Navigating Through Sites
  - Navigating Within Team Sites, Document Workspaces, and Group Work Sites
  - Navigating Within Meeting Workspaces
  - Navigating Within Blog Sites
  - Navigating Through Sites Using Mobile Devices
- Using the Ribbon
- Creating Sites
  - Creating Subsites
  - Creating a New Document Workspace from a Document in a Site
  - Creating Advanced Sites Using Office
- Managing Site Security
  - Managing SharePoint Groups
  - Changing Permission Inheritance for a Site
  - Managing Permission Levels
  - Managing Site Collection Administrators
- Changing Site Details
  - Updating the Site Title, Description, URL, and Logo
  - Customizing Navigation Options
  - Updating Site Themes
  - Resetting Site Definitions
  - Configuring Regional Settings for a Site
  - Deleting Sites
- Managing Site Templates
  - Creating Site Templates
  - Activating and Deactivating Site Templates
  - Editing Site Templates
  - Deleting Site Templates
- Searching SharePoint Foundation Sites
  - Working with Search Results
  - Managing Site Search and Offline Availability

- Using Usage Reports
  - Using Site Usage Reports
  - Using Site Collection Usage Statistics
  - Viewing Site Hierarchy
- Managing Site and Site Collection Features
  - Managing Site Features
  - Managing Site Collection Features
- Using the Recycle Bin
  - Viewing Items in the Recycle Bin
  - Restoring Items from the Recycle Bin
  - Deleting Items from the Recycle Bin
- Using SharePoint Designer for Site Management
- Managing Help Information
- Hands-on Lab

Chapter 3: SharePoint Server 2010
- Understanding SharePoint Server Portals
  - Publishing Portal
  - Enterprise Wiki
- SharePoint Server Navigation Enhancements
  - Navigation Bar
  - Site Actions Menu
  - Quick Launch
  - Navigation Management
- Using SharePoint Server Search
  - Performing Simple Searches
  - Performing Advanced Searches
  - Working with Search Results
  - Working with Search Scopes
  - Using Search Keywords and Best Bets
  - Setting Searchable Columns
  - Changing Search Settings
- Managing Site Look and Feel
  - Defining the Welcome Page
  - Managing Page Layouts and Site Templates
  - Managing Master Pages and Style Sheets
- SharePoint Server Site Templates
  - Visio Process Repository Template
  - Enterprise Wiki Template
  - Document Center Template
  - Records Center Template
  - Business Intelligence Center
  - Personalization Site Template
  - Enterprise Search Center
  - Basic Search Center Template
  - FAST Search Center Template
  - Publishing Site Template

- o Publishing Site with Workflow Template
- o Web Databases Templates
- Managing Site Content and Structure
- Managing Usage Reports and Auditing
  - o Site Usage Reports
  - o Site Collection Web Analytics Reports
  - o Site Collection Auditing
- Working with Site and Site Collection Features
  - o Site Features
  - o Site Collection Features
- Managing Content Variations
  - o Variation Labels
  - o Translatable Columns
  - o Variation Logs
- Using Managed Metadata
  - o Term Store Administrators
  - o Managing Term Sets
- Hands-on Lab

Chapter 4: List Concepts
- Creating Lists
- Working with Lists
  - o Adding, Editing, and Deleting Items
  - o Filtering and Sorting the List
  - o Using Views
  - o Faster Data Manipulation Using the Datasheet
  - o Folders
  - o Versions
- Managing Lists
  - o General Settings
  - o Content Approval
  - o Security
  - o Managing Columns
  - o Managing Views
  - o Creating a List Template
  - o Deleting the List
- Advanced List Concepts
  - o Site Columns
  - o Content Types
  - o RSS Feed Settings
- Advanced Office Integration
  - o Exporting SharePoint Lists to Excel
  - o Creating Custom Lists Using Excel
  - o Advanced Datasheet Features
  - o Using Lists Offline
  - o Managing Lists with Access
- Hands-on Lab

Chapter 5: Lists
- Using Communications Templates
  - Announcements
  - Contacts
  - Discussion Board
  - Circulations
- Using Tracking Templates
  - Links
  - Calendar
  - Tasks
  - Project Tasks
  - Issue Tracking
  - Survey
  - Agenda
- Using Custom Lists
  - Decisions
  - Objectives
  - Text Box
  - Things to Bring
  - External Lists
- Additional Meeting Workspace List Concepts
  - Lists for Meetings in Series
  - Attendees
- Using Additional Lists with SharePoint Server 2010
  - Status List
- Integrating Further with Office
- Hands-on Lab

Chapter 6: Libraries
- Document Library
  - Creating Document Libraries
  - Working with Document Libraries
  - Managing Document Libraries
- Form Library
- Picture Library
- Wiki Page Library
- Report Library
- Slide Library
- Asset Library
- Advanced Library Concepts
- Advanced Office Integration
  - Open and Save As Integration
  - Shared Workspace and Document Management Task Panes
  - Accessing Offline Documents by Connecting Libraries with Outlook
  - Creating Form Libraries Using InfoPath Form Publishing
  - Additional Advanced Office Integration
- Hands-on Lab

Chapter 7: Workflow and Information Management Policies
- Workflow
    - Managing Workflows
    - SharePoint Server 2010 Workflows
    - Workflow with SharePoint Designer
- Records Management
    - Record Declaration Settings
    - Using Records
- Information Management Policies
    - Policy Features
    - Site Collection Policy
    - Site Content Type Policy
    - List and Library Policies
    - Policy Columns in Views
- File Plan Reports
- Hands-on Lab

Chapter 8: Pages and Web Parts
- Pages
    - Web Part Pages
    - Publishing Pages
    - Pages
- Web Parts
    - Adding Web Parts to Pages
    - Managing Web Parts on Pages
    - Exporting and Importing Web Parts
    - Standard Categories and Web Parts
- Further Customization
- Hands-on Lab

Chapter 9: Personalization Features
- Alerts
    - Subscribing to an Alert
    - Receiving an Alert
    - Managing Your Alerts
    - Removing Alerts for Other Users
- My Site
    - My Newsfeed Page
    - My Content Page
    - My Profile Page
- Tags and Notes
- Personalization Sites
- Personalizing Content
    - Integration with My Site
- Logon Management
    - Signing Out of the Portal
    - Signing In as a Different User

- Hands-on Lab

Chapter 10: Enterprise Office Services
- Excel Services
  - Publishing to Excel Services
  - Using Content Published through Excel Services
- Form Services
  - Creating and Submitting a New Form from a Form Library
  - Submitting a New Form Using the InfoPath Form Web Part
- Visio Services
  - Publishing to Visio Services
  - Accessing Visio Services Published Content from the Document's Context Menu
  - Accessing Visio Services Published Content using the Visio Web Access Web Part

Appendix A: Planning a Portal and Site Collection Taxonomy
- Planning and Designing for Functional Requirements
  - Describe typical functional requirements for Microsoft SharePoint Server 2010-based solutions and how to consider these requirements at the design
- Design/Deployment Best Practices and Industry Implementation Experience/Learning from practical examples
- Class Discussion - Planning and Designing a Taxonomy

Appendix B: Mega-Lab on Document Management Solutions
- Document Management Overview
  - Document Creation
  - Document Retention
  - Document Consumption
  - Document Update and Expiration
- Challenges of Document Management
- Needs for Document Management
- SharePoint Document Management Solutions
  - RFP Response Requirements
  - SharePoint Solution Components
  - RFP Response Process Definition
  - SharePoint Environment Layout
  - RFP Response Process Walk-Through
- Benefits of SharePoint Document Management Solutions
- Tips for Creating Effective Document Management Solutions

Appendix C: Mega-Lab on Project Collaboration Solutions
- Project Collaboration Overview
- Challenges of Project Collaboration
- Needs for Project Collaboration
- SharePoint Project Collaboration Solutions
  - Service Plan Offering Development Project Requirements
  - Project Process Definition

- o Configuring the SharePoint Environment Layout
- o Service Plan Project Process Walk-Through
- Benefits of SharePoint Project Collaboration Solutions
- Tips for Creating Effective Project Collaboration Solutions

Appendix D: Dashboards and Reporting Solutions
- Dashboards and Reporting Overview
- Challenges of Reporting
- Needs for Reporting
- SharePoint Dashboard and Reporting Solutions
  - o Sales Dashboard Requirements
  - o SharePoint Solution Components
  - o Dashboard Process Definition
  - o SharePoint Environment Layout
  - o Sales Dashboard Processes Walk-Through