

SharePoint 2010 Train the Trainer Track

Duration: 5 days



Overview

This class combines Combined Knowledge Ltd's *SharePoint 2010 Collaboration for End Users*, *SharePoint 2010 Site Management for End Users* and *SharePoint 2010 Site Collection Administration* courses to provide a comprehensive training program for power end users who would also like to learn how to teach the Combined Knowledge Ltd. 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 SharePoint 2010 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 orientated around SharePoint 2010, but is also applicable to SharePoint Foundation 2010.*

During the *SharePoint 2010 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 2010 Train the Trainer* course is designed to teach delegates how to deliver our End User courses internally using the Combined Knowledge end user course material. Therefore, this course will only be relevant to organisations which have purchased the Site Licenses (electronic course manuals).

Site Licenses are electronic course manuals which 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.

If you require Site Licenses for the full *SharePoint 2010 End User* course, you will need to purchase a site license for *SharePoint 2010 Collaboration for End Users* and a Site License for *SharePoint 2010 Site Management for End Users*, as these are separate courses which combine to create the End User course. The Site Licenses can also be purchased separately, as it is likely that more users will require training at a *Collaboration* level than at a *Site Management* level.

Samples of the Site Licenses, and the pricing structure, are available on request.

If you already have the Combined Knowledge End User Adoption Solution and will be acquiring the 2010 end user content for this, this can also be used to print training materials for use internally.

Find out more about the End User Adoption Solution by visiting:

<http://www.combined-knowledge.com/EUA/index.html>

Purpose

This course is designed to provide to students with an in-depth understanding of the use, creation, and overall management of SharePoint 2010 sites. Students attending this course will build on their prior knowledge of SharePoint 2010 technologies in order to enable them to confidently teach this content within their organisation. This will course content will be enriched with information on best practices, training hints and tips, as well as "quick wins" which will assist the attendees when trying to get buy-in from their own attendees once they train the content internally.

Prerequisites

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

- Basic knowledge of Microsoft Office 2010 products
- Be familiar with Internet Explorer
- Familiarity with SharePoint 2010 and its basic functionality

Audience

The course is designed for those who intend to effectively teach – with the aid of the Combined Knowledge *SharePoint 2010 End User* training material – employees within their organisation.

Course Content

The following content will be covered from the point of view of teaching the attendees how to deliver the material:

Introduction to SharePoint 2010

This module highlights the uses and benefits of SharePoint 2010. 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 SharePoint 2010
- Get Started Using SharePoint 2010
- Search for Content
- Use Alerts
- Welcome User Links
- Personalise SharePoint 2010 Page

Finding Content

SharePoint provides the ability to store vast amounts of content in a variety of locations. This module covers a set of tools which help users efficiently locate the information they need.

- Navigation
- Search
- Search Index
- Refinements
- Best Bets

List Basics

Lists serve as the structure for calendars, discussion boards, contacts, and tasks in SharePoint 2010. 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 SharePoint 2010 Lists
- Sort and Filter Content
- Advanced List Features
- Use Default and Custom Views
- Connect a List to Microsoft Outlook

Library Basics

A **document library** is a location on a site where you can create, collect, update, and share files with other people. This module explains the benefits of using a library and teaches the student how best to work with documents in a library. The following topics are covered:

- Introduction to document libraries
- Uploading, creating and deleting documents
- Working with folders and document sets
- Working with documents in a library
- Working with document properties
- Document Management Features
- Using document workflows

Office integration Features

To take full advantage of many features which SharePoint 2010 has to offer, we need to understand SharePoint's relationship with other Microsoft Office applications. This module provides an essential overview of the Microsoft products which are most commonly used in conjunction with SharePoint 2010 and discusses at an overview level the advantages of each program when combined with SharePoint, including:

- Access 2010

- Excel 2010
- PowerPoint 2010
- InfoPath 2010
- Outlook 2010
- SharePoint Designer 2010
- SharePoint Workspace 2010

Advanced Document Library features

This module covers a selection of topics which are new to SharePoint 2010 and provide facilities to help users find, organise and store content. Document IDs provide a method for referencing documents to make them easier to find and share. Document Sets enable users to group related documents in a similar way to folders but with several additional benefits. The Content Organizer is a system which can automatically route content to the correct location within SharePoint dependant on preset rules. The following topics are covered:

- Introduction to Document IDs
- Configuring Document IDs
- Introduction to Document Sets
- Configuring Document Sets
- Creating Rules

Structuring Document & Content Management

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 organisations. This module covers elements such as views, columns and managed metadata which are fundamental to this construction. Versioning and other library settings which can serve to enhance a list or library are also taught in this module. The following lessons are covered:

- Creating lists & libraries
- Managing list & library properties
- Creating list templates
- Creating & managing columns
- Site columns
- Creating & managing views
- Managed metadata
- Configuring advanced list & library settings

Creating & Managing Content Types

Configuration of Content Types allows Site Collection Administrators and Site Owners to group attributes such as metadata, workflows and document templates into functional components. These Content Types can be managed in a dedicated site collection so that they can be shared across the entire SharePoint farm. This functionality allows for an enhanced user experience and reduced administrative overhead: The following lessons are also covered:

- Introduction to content types
- Creating & managing site content types
- Content type settings
- Document Sets

- The Content Type Hub
- Deploying content types

Creating & Managing Workflows

Workflows are a powerful efficiency tool which can be used to organise and track process driven tasks. In this course, application and customisation of these workflows is demonstrated using real world examples, as well as investigating how Visio and SharePoint Designer can be used to enhance the experience. Students are given the opportunity to build workflows and track workflow tasks. The following lessons are covered:

- Introduction to workflows
- Workflow scenarios
- Creating workflows
- Configuring workflow settings
- Deploying workflows
- Creating workflows from MS Visio 2010
- Extending workflows with MS SharePoint Designer 2010

Site Customisation

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

- Adding Pages to your SharePoint Site
- Adding and Modifying Web Parts
- Look and Feel Settings
- Modifying Navigational Components
- Creating Site Templates

Site Creation and Deletion

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

- Introduction to Site Topology
- When to create a site and where?
- How to Create a new Site
- Deleting Sites

Collaborative Site Templates

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:

- Introduction to Collaborative Site Templates

- Document Workspaces
- Meeting Workspaces
- Blog Sites
- Group Work Sites

Permissions and Security

Security is an important element of any site collection. This module includes Instructor-led demonstrations of default groups. Thorough coverage of the use, creation, and application of custom permission levels provide students with comprehensive knowledge about the creation and management of sites. We also focus on security management best practices. The following lessons are covered:

- Introduction to Security in SharePoint 2010
- Permissions, Permission Levels and SharePoint Groups
- Manage User Access to SharePoint Site
- Manage SharePoint Groups and Users
- Breaking Permissions Inheritance within the Site
- SharePoint Security Best Practices

Site Administration and Settings

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

- Introduction to Site Administration and Settings
- Manage Regional Settings
- Manage Site Libraries and Lists
- Manage User Alerts
- Managing RSS Usage
- Search and Offline Availability
- Manage Sites and Workspaces
- Workflows
- Workflow Settings
- Related Links Scope Settings
- Term Store Management
- Manage site Features
- Save Site as Template
- Reset to Site Definition
- Site Web Analytics Reports

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

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

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
- Search Keywords
- Search Centre Sites

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. This module covers:

- Site Collection Recycle Bin
- Site Directory
- Site Hierarchy
- Connect Site Collection to a Portal Site
- Audit Settings for Site Collections
- Audit Reports
- Document ID Settings
- Content Type Publishing
- SharePoint Designer Settings

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