

# Office SharePoint 2007 Power End User

Course Length: 4 days

## Overview

This 4-day class presents students with a ground-up understanding for how to use, operate and build sites in a Microsoft Office SharePoint Server 2007 environment. Students first learn about site navigation, data storage and retrieval through instructor-led modules covering navigation, search and effective use of lists and libraries. Building on this information, students then take a deeper dive 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 material, providing a framework for the topics discussed.

**Note:** This course is oriented to Microsoft Office SharePoint Server, but is also applicable to Windows SharePoint Services 3.0.

## Purpose

This course is designed to provide to students a practical understanding of the use, creation and management of Microsoft Office SharePoint Server 2007 sites. Students attending this course will learn how to effectively navigate and contribute content within the framework of a collaborative environment. Advancing from these topics, students learn how to build and manage site components, structured around efficient maintenance and consumption. Discussions of core best practices provide students with context for employment of the functionality taught.

## 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

## Audience

This course combines focus and understanding for those contributing to, building or managing MOSS 2007 sites. Individuals performing the jobs listed below will benefit from knowledge gained in this course.

- MOSS 2007 users who want to develop a better understanding of how to efficiently find content, use and contribute to collaborative sites.
- MOSS 2007 users who are responsible for managing one or more sites or site components, such as lists and libraries.
- Help Desk personnel who provide support to end users that use or manage MOSS 2007 sites.



### Course Outline

#### 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 that will be used throughout course is defined in this module. The following topics are also covered:

- Overview of SharePoint
- Get Started in SharePoint
- Search for Content
- Use Alerts
- Welcome User Links
- Personalize SharePoint Page

#### Module 2: 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 SharePoint Lists
- Sort and Filter Content
- Advanced List Features
- Use Default and Custom Views
- Connect a List to Microsoft Outlook

#### Module 3: 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 4: 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 segment. The following lessons are covered:

- Create Lists and Libraries
- Manage List and Library settings
- Create and manage individual list and library columns and Site Columns
- Create and manage of Views

#### Module 5: Customize SharePoint 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
- Web Parts that allow content targeting

### **Module 6: Create Sites and Web Pages**

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:

- Create new sites
- Create Basic and Web Part Pages

### **Module 7: Secure SharePoint Sites**

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 SharePoint Security
- Manage User Access to SharePoint Sites
- Manage SharePoint Groups and Users
- Best practices for assigning permissions in SharePoint

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

In this lesson site owners learn how to customize navigational settings, site descriptors, and themes. Additional focus is provided to the creation and use of templates, which are a significant time saving utility. The following lessons are covered:

- Customize the site title, description, and icon
- Configure navigation settings
- Left Navigation Panel Options
- Apply site themes
- Create site templates

### **Module 9: 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 real-world 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 10: Content Types**

Configuration of Content Types allows site owners to group attributes, such as workflows and document templates, in to functional components. This ability allows for an enhanced user experience and the reduction of administration effort.

- Overview of Content Types
- Create New Content Types
- Add Columns to Content Types
- Associate Content Types with Workflows

### **Module 11: 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 of these tools includes an emphasis on function and the appropriate use. 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 12: 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 13: Effective Use of My Sites**

In this module, students investigate the Web Parts, pages, lists and libraries available through a My Site. Focusing on personal and collaborative efficiencies through use of a My Site's data sharing and roll up tools, students gain insight on ways to more proficiently access and share information. The following topics are covered:

- Benefits and creation of a My Site
- Navigation and modification of a My Site
- Use a My Site to advertise information about yourself
- Collaborate with colleagues
- Keep track of content
- Use a My Site to store personal and public files
- Office 2007 integration with a My Site
- Using Outlook Web Access Web Parts
- Best practices for using a My Site

