

# d!scover

Information Technology & Training

Course 50608A:

## SharePoint 2010 for the iWorker - The Necessary Basics

### Course Length:

2 days

### Overview

In this 2 day instructor-led course, the students will learn to perform basic to advanced functions as an end user with SharePoint 2010 sites. This can be taught on-site or at a training company. This 2 day course can be combined with the Site Owner course to provide 5 days for the students.

### Target Student

The primary audience for this course is individuals who want to become more proficient with the use of SharePoint 2010 in the workplace. This course covers the basics for those who have never seen SharePoint or need to learn how to use it properly. This is a non-technical course for iWorkers.

The secondary audience for this course is individuals who will continue on to the "Site Owner" role and will take the more advanced courses. This course will serve as the prerequisite.

### Objectives

After completing this course, students will be able to:

Confidently interact with SharePoint sites as contributors/end users

Understand the purpose of each SharePoint element

Understand how to collaborate effectively

Understand "My Site"

Confidently manage synchronization of SharePoint sites

Understand the procedure to use Outlook to synchronize

Understand the procedure to use SharePoint Workspace 2010

Understand Searching for content or people in SharePoint 2010

Understand Tags, Notes and Voting and advanced sharing options

### Prerequisites

Before attending this course, students must have:

Experience using a web browser

Some Office 2007/2010 experience or exposure

### Course Outline

Module 1: Introduction to SharePoint 2010 as an End User

The students will be introduced to what SharePoint 2010 is and what it can do for the end user (employees) and for business (employers).

# d!scover

## Information Technology & Training

### Lessons

What is SharePoint?

The SharePoint Players (roles of various people)

Focus on the End User Expectations

Complete walkthrough of a SharePoint site

Lab : Explore a SharePoint 2010 site

After completing this module, students will be able to:

Describe what SharePoint 2010 is and what it looks like.

Understand how to interact with the various parts of the site

Proceed with interaction on their own SharePoint sites at work.

Understand the correlation of Office 2010 with SharePoint 2010

### Module 2: Getting Comfortable with SharePoint 2010

The students will be introduced to permissions, lists and libraries.

#### Lessons

Permissions on various objects in SharePoint and the roles of the players

Procedures for common every day SharePoint tasks

An introduction to lists and the importance of them

An introduction to Libraries and the importance of them

Authoring new documents

Participation in Discussion Boards

Lab : Lists, Libraries and Discussion Boards

Working with various list types

Working with various libraries

Participating in a discussion

Author a new document

After completing this module, students will be able to:

Describe various kinds of lists and the purpose of each

Describe the purpose of libraries and how to use them effectively.

Interact in a discussion board in SharePoint

Author new documents in SharePoint

### Module 3: Other SharePoint sites you may have to use

The students will be introduced to other sites they will be exposed to at work.

#### Lessons

A Meeting site

A Wiki site

A Records Center site

UserID options

My Site

Lab : My Site configuration

Discovering various site types and their uses

Working with "My Site"

After completing this module, students will be able to:

Interact with a Records Center site

# d!scover

## Information Technology & Training

Interact with a Wiki site  
Interact with a meeting site  
Interact with “My Site”  
Set up their profile and User ID options

### Module 4: Search, Voting Buttons and Tags

The students will be introduced to SharePoint social computing features that enable them to share favorite SharePoint sites and documents by tagging them with “I like it” or adding their own keywords and descriptions. This will expand the possibilities in search by using these key-words and tags in your search query. Also, their colleagues can see what areas you like and can also search on these keywords.

#### Lessons

Searching on a SharePoint page or site  
Using a dedicated search center site  
Using voting buttons (I like it) and tags (keywords)  
Using “people search”

Lab : Searching a SharePoint 2010 site

Lab : Rating content and pages in SharePoint

After completing this module, students will be able to:

Use all the functions of search to find anything, including tags, documents, words inside documents and people.

Use the voting buttons and understand their significance to others.

Add tags to everything for easy retrieval and sharing.

Using voting buttons (5 star system) to rate content and pages.

### Module 5: Extra Columns and Document Metadata

The students will be introduced to lists and libraries with extra columns. They will learn the significance and the correlation of these columns to the metadata of the document. These columns may be needed for Governance, but are very useful for searching, routing, categorizing and sorting data. Students will also be encouraged not to use folders, but instead sort large libraries or lists using column select sort.

#### Lessons

Exposure to extra columns in libraries and lists with compulsory data or not

How these columns link to the properties of the document (metadata)

How to sort columns to break down large libraries and lists

How to focus on documents from a specific department or person

How to use the Document panel within Word to access the metadata

Lab : Editing properties, using Document Panel and sorting by column

After completing this module, students will be able to:

Input data directly into the columns of a list or library.

Access the Document Panel within Office client programs.

Sort by the data in columns or metadata.

Shorten large libraries or lists using “sort by column”.

Understand using folders for permissions, not for organization.

# d!scover

## Information Technology & Training

### Module 6: Time Sensitive Lists Synchronization

The students will be introduced to the procedure and concepts of synchronizing anything in SharePoint with their client applications such as the Office Suite. Specifically, students will learn to synchronize SharePoint Tasks and Calendars with Office Outlook and SharePoint Workspace 2010.

#### Lessons

SharePoint Task list synchronization with Outlook 2007/2010

SharePoint Calendar synchronization with Outlook 2007/2010

Synchronizing SharePoint tasks and calendars with SharePoint Workspace 2010

Lab : Synchronizing SharePoint tasks and calendars with Outlook  
Lab : Synchronizing SharePoint tasks and calendars with Workspace

After completing this module, students will be able to:

Synchronize Calendars with Outlook or SharePoint Workspace

Synchronize Tasks with Outlook or SharePoint Workspace

Use these synchronized copies offline and re-synchronize later

### Module 7: Optional Practices

This section can be used if this course is scheduled to run by itself at the start of the day without the Beginner course first. This section adds more hands on practices to the day to reinforce the topics learned earlier. This is a deeper dive and extra exposure to the concepts and procedures.

The students will participate in collaboration scenarios that simulate work.

#### Lessons

An introduction to each scenario and what is expected of the student

Lab : Working with a Project site from start to finish

Simulating a work environment where everyone has to contribute to the project

Use tags to add keywords to areas of the project such as sites and documents

Use voting buttons on documents and seeing the results afterwards

Use the "Notes" function to add their own thoughts to a document or object

Search by filename, metadata, keyword or note

Search for people using a number of criteria

Synchronize the project site with SharePoint Workspace 2010

Synchronize the Calendars and Tasks of the site

Set up email alerts to various items and RSS notifications

After completing this module, students will be able to:

Interact with fellow students on a real Project Site in SharePoint

Fully understand all aspects of getting the project done in SharePoint

Confidently show others how to perform functions in SharePoint

Prepare themselves for the "Site Owner" course