

SharePoint Training



**National Aeronautics and
Space Administration**

**STATEMENT OF WORK / REQUEST FOR
QUOTATION
Customized SharePoint Training Course**

September 19, 2012

1 INTRODUCTION

1.1 PURPOSE

The purpose of soliciting a customized SharePoint Training class is to quickly train the Dryden user community, offering only modules that are currently in use in the Production SharePoint environment. Dryden users should have an understanding of SharePoint and its capabilities following completion of the class and be able to apply the skills they learn in the SharePoint environment at NASA Dryden.

1.2 DESCRIPTION

The training modules outlined in this Statement of Work are to be used by parties interested in bidding to create a customized learning plan and associated class materials for 20 students. The course is to be a 3-day instructor-led endeavor and will be held in Palmdale, CA. Depending on the number of interested users, multiple classes may be scheduled. NASA Dryden operates a SharePoint 2010 environment. Do not include training that defines the difference between SharePoint 2007 and SharePoint 2010 as it is irrelevant.

2 SCOPE OF WORK AND REQUIREMENTS FOR THE CUSTOMIZED SHAREPOINT TRAINING COURSE

2.1 GENERAL REQUIREMENTS – COURSE CONTENT

The course content outlined below was cobbled together using a number of Microsoft Course Descriptions. This list shall be used as a guideline for bidders to use during the creation of a customized course. The ordering of the topics below is somewhat arbitrary – please propose a course agenda that covers most of the proposed topics in the most effective order for students.

Module 1: Introducing SharePoint

This module explains the benefits of SharePoint, as well as the terminology and features of SharePoint 2010.

Lessons

- What is SharePoint and why use it?
- Collaborating with SharePoint
- Publishing with SharePoint
- Getting Around SharePoint

Lab : Getting Around SharePoint

- Navigating a SharePoint Site
- Creating an Alert

After completing this module, students will be able to:

- Know what SharePoint is, including the new features in SharePoint 2010.
- Explain sites, workspaces, blogs and wikis.

- Navigate in SharePoint.

Module 2: Working with SharePoint - Creating and Modifying Libraries and Lists

This module explains how to work with SharePoint lists and libraries, create and manage publishing and wiki sites, and use Office to connect to SharePoint. This module will dig deeper into both lists and libraries and will help organizations determine what works best for a given situation.

Lessons

- Overview of Libraries
- Creating a Library in SharePoint 2010
- Library Inventory
- Overview of Lists
- Creating a List in SharePoint 2010
- List Inventory
- Library and List Best Practices
- Creating Pages
- Integrating with Office

Lab : Using Lists

- Create a New Announcement
- Create a New Contact
- Start a New Discussion
- Reply to a Discussion
- Edit Discussions
- Delete Discussions
- Create a New List Item
- Create a Custom List
- Create a New Product Survey
- Create a List from Excel
- Attach a File to a List Item
- Edit a List Item
- Delete a List Item
- Edit a List View
- Add a List View
- Edit a List in Datasheet View
- Recovering Items from the Recycle Bin

Lab : Using Libraries

- Create a New Folder in a Library
- Add a File to a Document Library
- Check Out a Library Item
- Check In a Library Item
- Upload a Single Library Item
- Upload Multiple Library Items
- Create a Document Library
- Create an Asset Library
- Create a Wiki Page Library

Lab : Creating Pages

- Create a Publishing Page
- Edit Page Content in Place
- Create a Content Page in Word
- Edit a Wiki Page Home Page

Lab : Integrating with Office 2010*

- Open and Save Documents from Office 2010
- Check Out a Document in Office 2010
- Check In a Document in Office 2010
- Connect to a Document Workspace in SharePoint Workspace
- Open and Save Documents from SharePoint Workspace
- Check Out Documents in SharePoint Workspace
- Check In Documents in SharePoint Workspace
- Sync Documents in SharePoint Workspace
- Edit SharePoint Workspace Synchronization Settings

After completing this module, students will be able to:

- Use and manage SharePoint lists.
- Work with SharePoint libraries.
- Create publishing and wiki pages.
- Manage meetings in SharePoint.
- Integrate SharePoint with Office 2010.
- Understand the purpose of lists and libraries.
- Understand the differences between the different lists and libraries.
- Create a list or library using multiple methods.
- Customize a list form using InfoPath 2010.

Module 3: Creating Consistency Across Sites

When developing SharePoint 2010, it is necessary to create a consistent feel across sites within the site collection. This objective fits in to the Governance aspects of Module 3: Organization and Development of SharePoint 2010 Sites.

Lessons

- Site Columns
- Site Content Types
- Implementing Document Sets
- Show/Hide the Server Ribbon
- SharePoint Site Themes
- Overview of SharePoint Templates
- Managing Through Site Templates
- Managing Through List and Library Templates
- Page Layout and Site Template Settings
- Consistency Best Practices

Lab : Creating Consistency Across Sites

- Exercise 1: Modify the SharePoint 2010 Site Theme
- Exercise 2: Create a Site Content Type
- Exercise 3: Create Document Set for Learning Lake
- Exercise 4: Create a Site Template

- Exercise 5: Create a List and Libraries Template
- Exercise 6: Designate a Specific Page Layout and Site Templates

After completing this module, students will be able to:

- Understand and use Site Content Types and Columns.
- Understand and Implement Document Sets.
- Implement and Customize SharePoint Site Themes.

Module 4: Displaying Data with Web Parts in SharePoint 2010

One important feature within SharePoint 2010 is the many different Web Parts. Most of the SharePoint 2010 Web Parts can be customized. This module will cover the different types of Web Parts that are available and the process of embedding and configuring them.

Lessons

- Overview of Web Parts
- Web Part Inventory
- Managing a Web Part on a Page
- Managing a Web Part
- Customizing a Web Part
- Web Part Maintenance
- Web Parts

Lab : Displaying Data with Web Parts in SharePoint 2010

- Exercise 1: Create and Modify a Web Part Page
- Exercise 2: Implement and Configure a Link List Web Part
- Exercise 3: Direct Tasks to Individuals using Task List Web Part
- Exercise 4: Implement and Configure a List View Web Part
- Exercise 5: Connect Web Parts to Display Information
- Exercise 6: Use a Content Query Web Part
- Exercise 7: Display Visio Diagrams using Visio Web Access
- Exercise 8: Use a Chart Web Part to Display Data

After completing this module, students will be able to:

- Understand the different types of Web Parts.
- Understand how to display Web Parts within a SharePoint 2010 page.
- Understand basic properties used to configure Web Parts.
- Understand how to maintain Web Parts.

Module 5: Document Management through Workflows

An integral part of SharePoint 2010 for document and information management is the ability to configure Workflows. By default, SharePoint 2010 comes with built-in Workflows to help organizations in a variety of different ways, including; approving a new item or document, collecting feedback from multiple users, or disposing of documents based on compliance policies.

Lessons

- Overview of SharePoint 2010 Workflows
- Approval - SharePoint 2010 Workflow
- Three-State Workflow
- Collect Feedback - SharePoint 2010 Workflow
- Collect Signatures - SharePoint 2010 Workflow

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- Disposition Workflow
 - Managing Workflows in SharePoint 2010
- Lab : Document Management through SharePoint 2010 Workflows
- Exercise 1: Create a Workflow to Approve New Projects
 - Exercise 2: Create a Feedback Workflow
 - Exercise 3: Create a Disposition Approval Workflow

After completing this module, students will be able to:

- Understand Workflows within SharePoint 2010.
- Implement and Configure the Approval – SharePoint 2010 Workflow.
- Implement and Configure the Three-State Workflow.
- Implement and Configure the Collect Feedback – SharePoint 2010 Workflow.
- Implement and Configure the Collect Signatures – SharePoint 2010 Workflow.
- Implement and Configure the Disposition Workflow.
- Understand how to Manage Workflows after created.

Module 6: Administration

This module explains how to build personal sites, manage user groups and their permissions, and administer SharePoint sites.

Lessons

- Managing User Groups and Permissions
 - Site Administration
- Lab : Managing User Groups and Permissions
- Create a New Group
 - Assign Users to a Group
 - Remove Users from a Group
 - Edit Group Settings
 - Remove a Group
 - Manage Item Permissions
 - Create a Custom Permission Level

Lab : Site Administration

- Change a Site Theme
- Create a Site Theme in PowerPoint
- Apply a Site Theme from PowerPoint
- Customize Publishing Site Navigation
- Save a Site as a Template
- Recovering Items from the Site Collection Recycle Bin
- Install and Activate a Sandbox Solution
- Deactivate a Sandbox Solution

After completing this module, students will be able to:

- Manage user groups and their permissions.
- Perform basic site administration tasks in SharePoint.

2.2 TRAINING MATERIALS

Customized training manuals are to be produced and provided by the training vendor. Each student should receive a manual/workbook that has been tailored to match the customized learning plan.

The organization providing the training will provide all materials, visual aids, computer files, software, etc. that is required to deliver the course content. The students will be responsible for bringing a laptop computer to class. NASA will provide network connections as required. Vendor will provide server-side hardware. Our preference is a remote desktop connection to Vendor's remote SharePoint Environment, but we will consider other alternatives presented.

Proposal shall include full documentation of the SharePoint Lab Environment to include:

- An architectural drawing to demonstrate connectivity between student computers and the SharePoint environment provided by the trainer to include internet access requirements.
- All connections are to be outlined in the proposal. For example, how will the students access the SharePoint environment: HTTP, HTTPS, SFTP, CIFS, etc.
- A list of equipment and software that will be provided by the training company.
- A detailed list of software that will be installed on the student's machines.
- A detailed list of hardware/equipment to be provided by NASA.

Please note that systems brought on site will be scanned for vulnerabilities and viruses prior to connecting to NASA assets. All vulnerabilities and viruses must be mitigated upon discovery.

2.3 TRAINING LOGISTICS

The instructor will be expected to travel to Palmdale, CA to conduct the training. The first training class must be held October 23-25, 2012. The classes referenced in the Options section will be scheduled as needed should the options be exercised.

3 OPTIONS

As stated in section 1.2, multiple classes may be needed based on user community interest, please submit your bids to include options for additional classes. The additional classes will be exactly the same as the initial class (same syllabus, same length, same location, etc.):

1. Option 1, Additional SharePoint Class
2. Option 2, Additional SharePoint Class
3. Option 3, Additional SharePoint Class
4. Option 4, Additional SharePoint Class
5. Option 5, Additional SharePoint Class

4 SUBMISSIONS

Offerings must include detailed cost information on a line item basis. Bids must be submitted for consideration by October 5.