

Statement of Work for SharePoint Training

I. Scope of Work

a. Background

The purpose of soliciting a customized SharePoint Training class is to train the NASA Armstrong Flight Research Center (AFRC) user community, offering only modules that are currently in use in the AFRC SharePoint environment. Armstrong users should have an understanding of SharePoint and its capabilities following completion of these classes and should be able to apply the skills they learn in the SharePoint environment at AFRC.

b. Objectives

This Statement of Work (SOW) details the training modules required, which are divided between two classes; one for the basic SharePoint 2010 user (foundation) and one class for the advanced SharePoint user. This SOW is to be used by parties interested in bidding to create a customized learning plan and associated class materials to support 20 students in each class.

II. Applicable Document

The organization providing the training will provide all materials, visual aids, computer files, software, etc. that is required to deliver the course content. 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 learning plan.

III. Technical Point of Contacts

TBD

IV. Specific Task Requirements

FOR THE SharePoint 2010 Basic Foundation Course General Requirements – Foundation course content

The course content outlined below is very similar to the content suggested by Microsoft for the SharePoint 2010 Foundations training. This list shall be used as a guideline for bidders to use during the creation of a customized course. Please propose a course agenda that covers the proposed topics in the most effective order for students.

Lesson 1: Introducing Microsoft SharePoint Foundation 2010

- Describe Microsoft SharePoint Foundation 2010
- Describe the Microsoft SharePoint Foundation Team Site

Lesson 2: Working with Lists

- Add List Items
- Modify List Items

- Change List Views

Lesson 3: Working with Libraries

- Add Documents to a Library
- Edit Library Documents
- Share Documents Across Libraries
- Create Wiki Pages
- Request Access to SharePoint Content
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Lesson 4: Communicating with Team Members

- Participate in a Discussion Board
- Contribute to Blogs
- Collaborate via the People and Groups List

Lesson 5: Working Remotely with SharePoint Content

- Access SharePoint Content from Mobile Devices
- Work Offline with SharePoint Content on Microsoft Office 2010
- Work Offline with SharePoint Calendars

Lesson 6: Customizing Your SharePoint Environment

- Customize Personal and Regional Settings
- Personalizing the Page View with Web Parts
- Create an Alert
- Subscribe to an RSS Feed
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Lesson 7: Creating a Team Site

- Create a Site
- Create a Workspace
- Create a List
- Create a Library
- Create a Discussion Board
- Create Views
- Create a Survey
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Lesson 8: Performing Basic Site Administration

- Manage Users and Groups
- Manage Site Look and Feel
- Add List Items
- Modify List Items
- Change List Views

Requirements FOR THE SharePoint 2010 Advanced course General

Requirements – Advanced 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. 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

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

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

- Modify the SharePoint 2010 Site Theme
- Create a Site Content Type
- Create Document Set for Learning Lake
- Create a Site Template
- Create a List and Libraries Template
- Designate a Specific Page Layout and Site Templates

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

- Create and Modify a Web Part Page
- Implement and Configure a Link List Web Part
- Direct Tasks to Individuals using Task List Web Part
- Implement and Configure a List View Web Part
- Connect Web Parts to Display Information
- Use a Content Query Web Part
- Display Visio Diagrams using Visio Web Access
- Use a Chart Web Part to Display Data

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
- Disposition Workflow
- Managing Workflows in SharePoint 2010

Lab: Document Management through SharePoint 2010 Workflows

- Create a Workflow to Approve New Projects
- Create a Feedback Workflow
- Create a Disposition Approval Workflow

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

V. Period of Performance

The basic course will be a maximum of two days in length, will be instructor-led, and will be held in Palmdale, CA. Depending on the number of interested users, multiple classes may be scheduled. The advanced class will be a maximum of three days in length, will be instructor-led, and will also be held in Palmdale, CA.

VI. Deliverables

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.

VII. Acceptance Criteria

Offerings must include detailed cost information on a line item basis. Bids must be submitted for consideration by July 3rd, 2015.

VIII. Contractor/Government Furnished Property/Government Furnished Equipment

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.

IX. Special Considerations

The instructor will be expected to travel to Palmdale, CA to conduct the training.

X. Security Requirements

N/A