



## Online or 2 day SharePoint Specialist Course

*- Learn global best practices for implementing SharePoint*

### Introduction

SharePoint has become one of Microsoft's fastest selling products of all time, but a successful implementation requires a strategy and structure for how to share and manage information. Microsoft provides technical training on SharePoint, and AIIM provides you with an excellent understanding of global best practices for implementing and managing SharePoint. Get the real story about what's possible with SharePoint 2007 and 2010, and learn about technologies that complement SharePoint.

The **SharePoint Specialist** course covers global best practices for implementing SharePoint, and is available as an online or 2-day classroom training course leading to a Specialist designation. It builds on the Practitioner track, which is why we recommend you first take the Practitioner course. The online course consists of 11 online modules, and each module is approximately 45 minutes. Classes are available in several large cities, or as on-demand in-house courses. The primary focus of this training is on 2010 capabilities, touching on 2007 or earlier capabilities as needed.

### Course Development

The course objectives and content is defined and reviewed by AIIM Education Advisory Groups in the US and Europe, representing AIIM's more than 65,000 associate and professional members. These Education Advisory Groups have the following members:

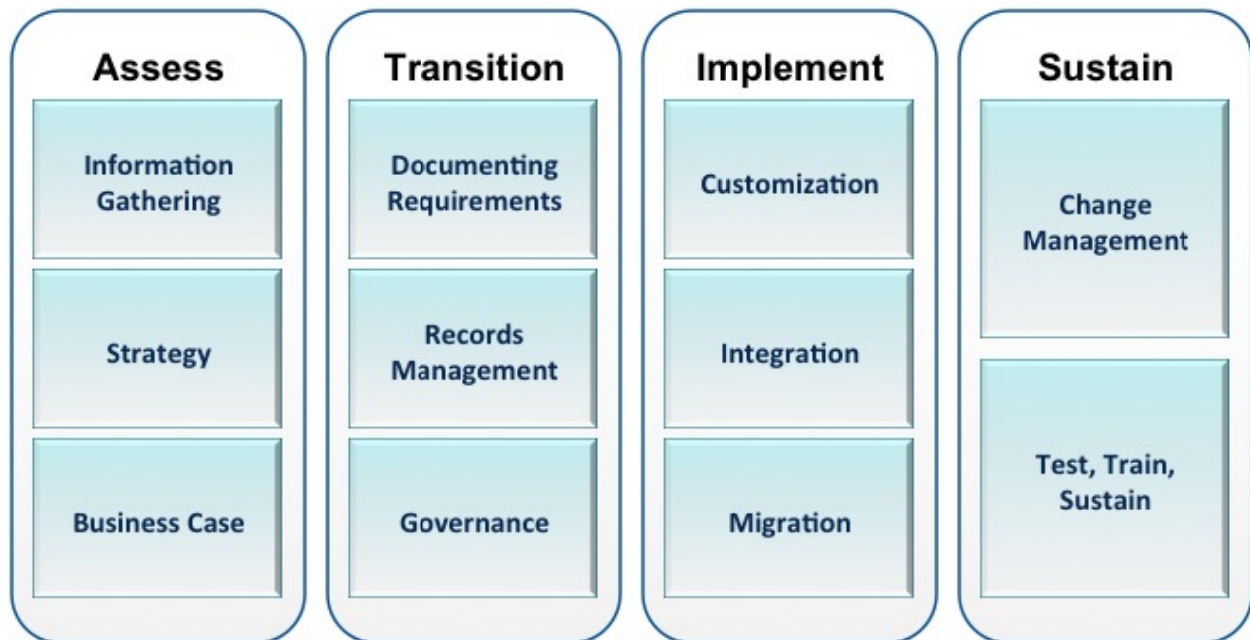
Accenture	Hyland Software
Albistur Consulting	IBM
Barclays Capital	Inforesight Limited
Bill and Vieve Gore School of Business, Westminster College	JPMorgan Chase
BP	Kodak
Chevron Phillips Chemical Company	Kofax
CIA	Marion County Health Dept.
Crown Partners	Objective Corporation
Doculabs	Oracle
Fujitsu	Ordina
Gambro	Ricoh
Gartner	Royal Mail Group
Gimmel Group	Shell
GlaxoSmithKline	Sunoco
Harris Corporation	The National Archives of United Kingdom
Hartman Communicatie	The South Financial Group
Health First	US Courts
Hewlett-Packard	US Department of Treasury
	ZyLAB

AIIM is an industry association that provides education, research, and best practices to help organizations find, control, and optimize their information. For over 60 years, AIIM has been the leading non-profit organization focused on helping users to understand the challenges associated with managing documents, content, records, and business processes.

The course materials were developed in partnership with Gimmel based on requirements and best practices defined by the above companies.

### Course Structure

The SharePoint Specialist course covers global best practices for implementing SharePoint.



### Learning Objectives

Below is an overview of learning objectives covered in the Specialist course:

#### Module: S S A -1 - Information Gathering

Participants should be able to:

- Objective 1 – Analyze the business and existing content/systems to identify capabilities and gaps
- Objective 2 – Quantify storage, volume, capacity and geography requirements
- Objective 3 – Understand the basics of interviewing and what elements of design need to be gathered at what stage

Topics:

- Intended use
- Business processes & Orientation
- Analyzing legacy ECM and RM content
- Email
- Centralized versus decentralized requirements
- File Shares
- Physical files



### Module: S S A-2 - Business Case

Participants should be able to:

- Objective 1 – Quantify the technical, administrative and productivity benefits from implementing SP
- Objective 2 – Identify the business case areas for justifying a SP environment
- Objective 3 – Identify the level of effort and cost elements to accomplish specific implementation scenarios

Topics:

- Cost benefit
- Economic, strategic, commercial and productivity cases
- Estimating costs and level of effort (TCO)
- Value Proposition – Searching/Finding, Compliance/Retention Management, Integration with other Systems

### Module: S S A-3 - Strategy

Participants should be able to:

- Objective 1 – Build a content management strategy for SP content
- Objective 2 – Understand and communicate the scope and impact of the strategy on business areas
- Objective 3 – Construct a reference architecture to identify a list of projects and opportunities

Topics:

- Strategic goals and business drivers
- Roadmap and Transition Plan
- Maturity Assessment
- Reference Architecture
- Federated search and RM
- Project Portfolio – program vs. project decisions
- Site planning (Portal, team, presence, etc)
- Approvals, Variations, Scheduling

### Module: S S T-4 - Documenting Requirements

Participants should be able to:

- Objective 1 - Develop and define the technology requirements for your SP solution
- Objective 2 – Leverage existing standards to simplify the production of your technology requirements
- Objective 3 – Identify the categories of functional areas to document when gathering requirements

Topics:

- Content Management, RM, ILM and enterprise wide requirements
- Process orientation
- Operational planning – dispersed versus centralized concerns
- Legal and Compliance
- Technical architecture
- Finding a solution provider – local partner versus info mgt implementer
- RFP Process



### Module: S S T-5 – Records Management

Participants should be able to:

- Objective 1 – Review the state of an organization’s ability to comply functionally and technically with records management imperatives
- Objective 2 – Communicate the technical, legal, business and RM components that influence enterprise compliance
- Objective 3 – Recognize the technical solutions available in Sharepoint to meet these challenges

Topics:

- What is records management/ general principals, polices, schedules
- SharePoint, Moreq and DOD5015
- RM and ECM Challenges in Sharepoint
- Methods to achieve RM compliance

### Module: S S T-6 - Governance and Control

Participants should be able to:

- Objective 1 – Establish a governance structure and role definition for a SP program
- Objective 2 – Recognize the appropriate responsibility for different usage, development, support, infrastructure issues
- Objective 3 – Develop high level governance plan and program document

Topics:

- Keeping SP from becoming the new shared drive
- What should Sharepoint be and not be used for
- Openness vs central control
- Master sites
- Content Governance and Enterprise Information Lifecycles
- Central and Distributed Administrative Governance
- Governance in Multi-Repository Solutions

### Module: S S I-7 - Configuration, Customization, Extension

Participants should be able to:

- Objective 1 – Identify tools and options for development within SharePoint
- Objective 2 – Plan and design primary components for the core capabilities of SharePoint
- Objective 3 – Be able to evaluate the buy versus build options
- Objective 4 – Identify the risks and issues with configuration versus custom development
- Objective 5 – Determine realistic resource requirements (human and machine) for development and support

Topics:

- Foundational readiness
- Operational planning - size and support issues
- Analytics for performance and usefulness
- Tools, methodologies and approaches for development (Waterfall, Agile, etc)
- Resource requirements and management



### Module: S S I-8 - Integration and Interoperability

Participants should be able to:

- Objective 1 – Identify legacy application integration requirements, including functions, key indexes, etc.
- Objective 2 – Enumerate existing platform and protocol standards that impact Sharepoint integration
- Objective 3 – Identify strengths and weaknesses with integration to other content management platforms

Topics:

- Integration with other legacy applications
- One time population versus building data bridges
- SharePoint vs. Multi-Repository Solutions
- Desktop applications - Excel sever, Project server , Visio server

### Module: S S I-9 - Migration

Participants should be able to:

- Objective 1 – Identify and quantify what types of content can and cannot/should not be migrated to SharePoint
- Objective 2 – Map data and data type from one system to another
- Objective 3 – Validate migration for quality assurance
- Objective 4 – Quantify and plan level of effort required for migration

Topics:

- From SharePoint 2003 and 2007 to 2010
- From Legacy ECM and RM solutions
- From File Shares, personal and shared content
- Determining destinations and security considerations
- Time considerations and resource planning

### Module: S S S-10 – Change Management & Adoption

Participants should be able to:

- Objective 1 – Identify the technical, organizational and cultural elements of a change management program
- Objective 2 – Coordinate support, infrastructure, migration and training for effective roll-out
- Objective 3 – Develop a communication plan before, during and after implementation

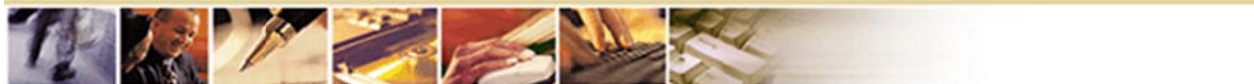
Topics:

- Roll out schedule and ongoing business realities
- Communicating the true value and appropriate expectations for SharePoint
- Get people to add metadata, tags, retention categories
- Leveraging the viral effect of SharePoint

### Module: S S S-11 – Test, Train, Sustain

Participants should be able to:

- Objective 1 – Ensure the implementation meets user expectations
- Objective 2 - Develop a disaster recovery plan
- Objective 3 – Identify capacity changes and requirements for performance monitoring
- Objective 4 – Use various tactics to ensure continued quality improvements on system and data



Topics:

- Quality Auditing
- System management options, tools and MSMS
- Fault tolerance, Disaster recovery

### **Course Designation**

You will be awarded the AIIM SharePoint Specialist (SharePoint<sup>S</sup>) designation after passing the online exam. This is an AIIM standard for industry professionalism and knowledge. By earning this designation, you can call yourself an AIIM SharePoint Specialist. You can use the associated logo and title on your business card, email signature, web page, etc. The exam is available via the Internet – you have 6 months to pass the test after attending the training course.

Benefits of becoming an AIIM SharePoint Specialist (SharePoint<sup>S</sup>):

- Position yourself to be tomorrow's leader by enhancing your business and professional skills
- Learn global best practices for implementing solutions
- Discover real world solutions and best practices for challenges you face
- Learn from experts in the field who are able to answer your questions, address your comments, and are willing to accept your feedback.

### **Who should attend the Specialist course?**

The course is designed for IT staff, Business Managers, Compliance Officers, Risk Managers, Records Management Professionals, as well as for solution integrators and providers, sales consultants, project managers, and technical staff.

### **Summary**

*Alternative 1:*

Online training available 24-7 for 6 months:

- 24-7 access to 11 Online Training Modules, each approx 45 minutes long, for 6 months
- Includes 3 opportunities to take and pass the AIIM SharePoint Specialist online exam
- Includes English language delivery and all training materials

*Alternative 2:*

Classroom training with supporting online course modules:

- SharePoint Specialist Class, 2-days, 9:00 AM – 5:00 PM with a maximum of 20 attendees
- Includes access to supporting online modules
- Includes 3 opportunities to take and pass the AIIM SharePoint Specialist online exam
- Includes English language delivery and all training materials

Go to [www.aiim.org/training](http://www.aiim.org/training) to learn of public courses being held in your area and their dates, and please contact [training@aiim.org](mailto:training@aiim.org) if you have any questions.

*Course structure, objectives and topics are subject to change without notification.*

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