



Synergy Technology Productivity Training Series

SharePoint Content Manager

Course Outline

The purpose of this day long course is to provide the basic skill set for the management and display of information using both Web Content and Enterprise Content Management features in SharePoint 2010. SharePoint 2010 provides a robust set of capabilities for controlling the means of information intake, processing, and disposition. This control allows for the orderly assignment of information to appropriate locations in SharePoint, and the timely display of information. The Content Manager course puts in the hands of content managers the tools and capabilities to leverage the Web Content and Enterprise Content Management features of SharePoint 2010, and to align the flow and display of enterprise content with organizational requirements and business needs.

Skills Gained

After completing the course students will:

- Understand the role of the Content Manager in a business organization
- Know how to create and manage a publishing site
- Know the basic structure of a publishing site, and know how to use the publishing functionality
- Understand the concept of content types, and how they are implemented
- Be able to work with content organization to enable document automation
- Understand in place records management
- Be able to identify and use standard Web Parts to display enterprise content in a dashboard-like interface
- Understand how to implement workflows for publishing automation
- Know how to manage key content oriented aspects of SharePoint 2010 site infrastructure

Target Audience

The class is targeted towards individuals who are responsible for controlling the flows and presentation of content within SharePoint 2010. This includes persons that are tasked with automating business processes, standardizing the capture of information, managing and customizing the presentation of information, and controlling the timing and display of information to business audiences.

Prerequisites

The Content Manager course requires extensive use or advanced knowledge of SharePoint as an information worker. Functional capabilities for course entry include the understanding of how to: navigate site and list settings; work with Web Parts; and create lists/libraries and sites. Completion of the Site Administrator course in the Synergy Technology Information Worker Training Series satisfies these course prerequisites.



1. **Content Management in SharePoint 2010**

This chapter gives an overview of content management in SharePoint 2010, defining the basic concepts of Web Content Management and Enterprise Content Management. The context in which content managers work, the roles they fill, and the functions that they perform in each role are described and the tools available to the content manager are outlined and briefly described.

Key concepts: roles and responsibilities; content management

2. **Using SharePoint 2010 Web Content Management**

This chapter introduces the use of publishing sites in SharePoint 2010. The basic characteristics of a publishing site are identified and explained. Site settings are explored to illustrate the control that publishing site managers have over content creation. Students learn the details of publishing tools and the publishing infrastructure. Students are also taught how publishing sites allow for the separation of content from design.

Key concepts: content publication; publishing process; Subject Matter Experts; publishing sites

3. **Creating and Managing Publishing Pages**

This chapter explains the use of publishing pages within the context of a publishing site. Students learn about all facets of publishing pages and the publishing process, wherein pages are created, updated, approved and managed. The use of content-controlled publishing pages versus the use of wiki publishing pages in Enterprise Wiki sites is discussed.

Key concepts: publishing page; master page; page layout; field controls; page settings; wikis

4. **Configuring Workflows for Publishing**

This chapter describes the use of workflows in the page publication process for publishing sites. Publishing sites have an integrated approval workflow, which aids in the management, timing, and editorial control of new page content. Students are shown the key elements of the workflow process, including how the approval workflow is launched, the stages of a page approval life cycle and how to assign approving entities. Additionally, students will learn how to customize the out-of-the-box approval workflow using SharePoint designer in order to better meet specific business needs.

Key concepts: publishing approval; content life cycle; workflow automation; workflow customization

5. **Standardizing Information with Content Types**

This chapter reveals a powerful tool for both web and enterprise content management. Content types are named elements which have associated settings such as metadata, workflows, document templates, and information management policies. Content types are based on an inheritance model which allows for reuse of defined business information or processes. Students are shown how to leverage content types to create standardization, uniformity, and manageability for enterprise information assets.



Key concepts: standardization; enterprise content; inherited settings

6. Using Content Organization and Records Management for Document Control

The Content Organization feature allows content managers to set up mechanisms to centralize document collection, and automate the process of moving documents to the appropriate repositories using rules based upon content type and metadata. This chapter explains how to use a Drop Off library for the intake and dissemination of documents on a SharePoint site. Records Management allows document owners or curators to declare that a document is an official record, thus removing the ability to modify the document or its metadata. Students are taught the basic elements of records management, and are shown how to use the records management functionality in SharePoint 2010.

Key concepts: rule based document management; centralized document submission; metadata and content type rule settings

7. Displaying Content with SharePoint 2010 Web Parts

This chapter explores the process of creating information displays using aggregated business data and standard SharePoint 2010 Web Parts. Dashboards are used for visualizing data in a manner that facilitates sound decision making, and for portraying complex information in a comprehensible, easy to understand way. Students learn how to construct such displays using SharePoint based data, charting, tabular data presentations, and filtering.

Key concepts: display of enterprise content; data visualization; web parts; dashboards

8. Structuring, Auditing, and Recovering Content

This chapter describes the Site Content and Structure interface, content management with variations, auditing and reporting, and the recovery of deleted content. The Site Content and Structure interface allows for the centralized management of SharePoint assets, and contains specialized functions for a variety of operations such as the bulk check-in of documents. Site settings allow for the management of variations, auditing, and content recovery. Students are shown how to use Site Content and Structure, as well as the mechanisms for managing translation with variations, setting up auditing and reviewing audit reports, and for managing the two tiered data recovery process with the recycle bin.

Key concepts: centralized site management; global site and content visualization; audit; multilanguage sites; data recovery