

Nick Grattan Consultancy Ltd

we demistify SharePoint expert-led training proven consulting custom software

Training Specification: Document and Records Management with MOSS 2007

www.nickgrattan.net



Overview

This **three day** training course teaches attendees how to plan and create document and record management solutions with MOSS 2007.

Pre-requisites

Course participants should be familiar with basic principles and operations in MOSS 2007.

TAXONOMIES, FILEPLAN, SITE COLLECTIONS, SITES, SITE COLUMN GALLERIES AND CONTENT TYPES

Defining taxonomies and classifications – Flat Hierarchical, network, faceted. Creating meta data through defining site columns for faceted classifications. Defining a File Plan and how it relates to a hierarchical taxonomy. Traditional file plans in SharePoint. Using SharePoint site collections, sites, content types and columns to implement taxonomies.

DOCUMENT LIBRARY FEATURES

Version, Check-in/Check-Out and Approval. Document policies and disposition. Creating document library templates for creating standard document libraries across sites. The Recycle bin and document recovery. Rights Management to control document access and actions performed on documents.

INTEGRATION WITH MICROSOFT OFFICE

Issues and limitations with using Microsoft Office 2003 / Office 2007 and MOSS 2007. Using templates (DOT and DOTX) files with MOSS 2007. Using Office 2007 QuickParts to place meta data within a document.

INFORMATION MANAGEMENT POLICIES

Using policies on document libraries and content types. Document expiration, auditing, labelling, barcoding and form conversion for archiving.

INDEXING AND SEARCHING

Configuring Shared Services Provides, indexing, content sources, keywords, best bets, properties. Customising advanced search and search result forms.

RECORDS MANAGEMENT

Creating and configuring a Records Center. Configuring Retention Schedules. Sending Content from MOSS 2007 to Records Repository Site. Using Document Policies for Expiration

WEB DAV, WINDOWS EXPLORER AND IMPORTING DOCUMENTS

Migrating documents from NTFS File Shares. Limitations with naming in MOSS. Tools for migrating, such as Windows Explorer, WebDav and other tools.

USING OUT-OF-THE-BOX WORKFLOWS

Using the “Approval”, “Collect Feedback”, “Collect Signatures”, “Disposition Approval” standard workflows for document libraries and content types.

CREATING CUSTOM WORKFLOWS

Creating custom workflows with Microsoft SharePoint Designer 2007. Workflows for custom document approval, confirmation of document deletion, moving documents between libraries, renaming documents.

CAPACITY PLANNING

Planning capacity and sizing, using multiple content databases in SQL Server. Estimating performance with the Microsoft System Center Capacity Planner 2007 tool. Analysing document usage and types.