

Microsoft SharePoint Training Service Offering

Core Service

SharePoint is part of the Microsoft 365 suite of applications providing a hub for creating websites, managing documents and facilitating collaboration within your organisation.

Our training courses will help your people feel confident when using SharePoint. We're passionate about training and supporting organisations to be the best they can be. As with every organisation, your people are your biggest asset. So, using our knowledge and expertise we can create and deliver bespoke training packages, to empower your people to feel confident when using technology.

We work with large organisations, SMEs, local businesses, public sector organisations and charities. We work in partnership with you, to create tailored training packages that support your business needs, growth and ambitions.

Service Description

Training can be delivered in a variety of ways including expert led webinars, interactive online training sessions or in person delivery. The number of attendees is agreed in advance as part of the planning process. Webinars target a larger number of end users, however, interactive online training sessions encourage more engagement from end users typically improving the learning outcomes. Often the technology will govern which format is more appropriate; more complex applications benefit from smaller groups. In person training requires all users to be onsite at the same time and is often governed by meeting room capacity.

Whilst Cloud9 Business Services has a training environment available for our clients, we will request a MS365 user account held on your Microsoft 365 tenant wherever possible. This means that we are representing the organisations environment, policies and permissions, for example access levels, available applications, document structure, Teams structure. This familiarity helps users apply knowledge to their own environment rather than trying to translate generic user interfaces to their own job roles.

Scope of Work

Cloud9 Business Services will discuss and agree conduct a training needs analysis with a key contact at your organisation. This may be identified by user requests, IT service desk enquiry analysis or driven by strategic objectives. It may include the review of other applications such as SharePoint to understand the overall document management process. Where this information is not available, our User Adoption Service Offering may be of interest (see our other services).

Once the requirements, including governance are understood, our team will create agendas based on the agreed learning objectives. These agendas are available for review prior to training delivery and once confirmed, can be shared to the relevant participants.

We work collaboratively with your organisation to agree a training plan, including proposed dates and sessions to allow the key contact to invite the relevant attendees. By managing internal invitations your organisation is in control of attendance and “owns” the meeting should training be delivered online.

Wherever possible training sessions are designed in bite sized sessions for maximum participation and understanding, aiming for no longer than 1.5 hours per session. We run a minimum of 2 sessions at a time (AM or PM) if remote or a full day if on site in person. Our experience shows that this works well for organisations, 2 sessions is generally required to ensure job roles are covered whilst other colleagues are attending training.

The recording of online sessions is not only permitted but encouraged, allowing as many users as possible to access the training content. Where agreed in advance, our team will ‘top and tail’ recordings allowing for branding and where appropriate, provides the ability to divide training sessions into logical sections.

Training documentation such as quick reference guides can be created at an additional cost, based on time taken to create the relevant materials. In addition, our team can create bespoke training videos pulling out key or more complex features of the application.

Post training, you will have access to a dedicated contact for a two to three week period, allowing you to ask relevant questions after training has been delivered. After this time, subject to our discretion further training or supporting documentation may be recommended.

Training Objectives:

Our goal in all training sessions is to meet the organisational objectives based on the initial training requirements. The core skills are applicable to the majority of organisations, however, we may find certain features are more important in some scenarios than in others, which is why bespoke training is key in upskilling your employees.

Our training sessions allow participants to engage directly with trainers to ask questions around the technology, but also how to apply the technology to their particular role. Wherever possible our trainers will describe features using examples and scenarios relevant to your organisation.

Course Content

Microsoft 365 provides users with automatic updates continually delivering new features in relation to the product roadmap. Therefore, as the product is constantly evolving, the course specifications are an example of training agendas and may not be identical to the training delivered. As training is also bespoke, the content may vary dependant on the organisations needs and objectives.

Microsoft OneDrive training is typically designed in conjunction with SharePoint document management training. OneDrive may be a pre-requisite to a SharePoint training allowing users

to build on their skills to ultimately understand the document management and collaborative working tools across the Microsoft 365 suite.

Assessment Criteria

Success criteria is agreed at the beginning of a training programme, along with the learning objectives. Training feedback is gathered via a feedback form using Microsoft Forms.

Feedback provided at the end of a session is valuable, however, this is more related to the delivery of the session rather than assessing how well learning objectives have been met. Therefore, our team will provide a feedback form designed to distribute to attendees approximately one week after the delivery of the training. We believe that a delay between training and feedback, allows individuals to provide a more effective evaluation not only on what they have learned, but how they have managed to apply this to their job roles.

The feedback is reviewed by our team, together with you, to identify any areas that may need to be followed up, for example, additional supporting documentation, drop-in sessions or additional training sessions. Success criteria is agreed at the beginning of a training programme, along with the learning objectives. Training feedback is gathered via a feedback form using Microsoft Forms.

What our Code Software say:

“Thank you so much for the training sessions today, I was snowed under with praise from people about how much they had learned. All credit to you both for developing the content and Claire for delivering it so well.”

Tony Murphy, IT Manager, Mental Health Foundation

Appendix A – Sample agenda

Our SharePoint document management course is typically designed to build on skills developed in the base Document Management for OneDrive course. This course focuses on how to work collaboratively on documents with colleagues and external contacts. Secure sharing, version control, navigation and document search tools are a key element of this course.

With each of our training courses, we will work with you to tailor the course to your organisation, to ensure we meet your business needs.

A typical course agenda will include the following:

Document Management – Working with SharePoint

Pre-Requisite – previously attended a Document Management – Working with OneDrive course.

Introduction

- What is SharePoint?
- How does SharePoint link to wider 365 and associated applications?
- What are the overarching benefits of SharePoint?

- Aims of training session

Overview of SharePoint

- Overview of the landing page
- Understand how to access document management sections

Document Storage

- Overview of document structure
- Understanding Document Libraries; accessing, saving and searching files
- How to synchronise or unsynchronise documents to File Explorer
- Saving shortcuts and how to access them
- Best Practice tips

Sharing files from SharePoint

- Why share a file or folder?
- How to share files and folders
- Managing access to a file or folder you have shared
- Receiving a shared file

Collaborative working

- Review changes made by clients / colleagues
- Restoring files
- Managing alerts for changes to documents
- How to access SharePoint within Teams
- Understanding the link between SharePoint and Teams

Duration: 1.5 hours

SharePoint provides more than document management, it is a base for collaborative working. Our Introduction to SharePoint course provides a high level overview of the application capabilities. This course is bespoke to the organisation expanding on features that will underpin the overall business strategy and agreed learning objectives.

Depending on the overall needs, courses may be broken into multiple sessions, however, a typical course agenda will include the following key areas, highlighting specific features as appropriate.

Collaborative Working – Introduction to SharePoint

Overview of SharePoint:

- Overview of SharePoint's purpose, features, and templates.
- Navigating site collections, subsites, pages, and libraries.

Document Management:

- Understanding document libraries and their integration with OneDrive and Teams.
- Managing access permissions and handling file versions.

Collaboration and Communication:

- Exploring SharePoint apps, site permissions, and site contents.



- Working with lists, integrating with Office 365, and collaborating effectively.

Advanced Features:

- Version control, check-out, content approval, and handling deleted documents.
- Using alerts, advanced search, sorting, filtering, and grouping.

Duration: 1.5 hours

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