
Course Description for *Implementing and Administering the Microsoft® Office Solution Accelerator for Sarbanes-Oxley*

Introduction

This course description details the course *Implementing and Administering the Microsoft® Office Solution Accelerator Sarbanes-Oxley*.

Elements of this Course Description

The following list identifies key elements contained in this course description.

- *Executive Summary*. Concise description of the course structure, audience and student prerequisites.
- *Audience*. Intended students of the course.
- *Student Prerequisites*. Recommended base of knowledge for students and for the instructor.
- *Objectives*. List of activities with which students will be familiar after completing the course.
- *Scope*. Topics addressed in the course and limitations of the course.
- *Course Timing*. Recommended timing for the two-day course.
- *Alternate Timings*. Modified timings for delivering the course in two hours.
- *Course Contact*. Author and business owner of the course.
- *Course Outline*. Detailed list of all course modules and topics within each module.

Course Overview

Executive Summary

This two-day instructor-led course is a combination of classroom lecture, interactive demonstrations, and hands-on labs. The primary audience for this course is technical professionals, with a content emphasis on deploying, configuring and using the Accelerator. Students will be required to have prior knowledge of the individual components, including Windows Server 2003, Office InfoPath, and Windows SharePoint Services.

Audience

This course is intended for IT professionals, including Solution Providers, System Integrators, partners, and technical staff from audit firms. Additionally, Microsoft field professionals who intend to engage customers for the purpose of deploying the Accelerator will gain benefit from the information provided in this course.

Student Prerequisites

This course requires that students meet the following prerequisites:

- Working knowledge of Microsoft Windows Server 2003, including TCP/IP and Internet Information Services (IIS).
- Working knowledge of Windows SharePoint Services or Microsoft Office SharePoint Portal Server.
- Working knowledge of Microsoft SQL Server 2000.
- Working knowledge of Microsoft Office 2003 System, including Office InfoPath.

Objectives

After completing this course, students will be able to:

- Describe the architecture of the Accelerator.
- Plan and design an Accelerator implementation.
- Deploy the Accelerator in a single-server environment.
- Configure the Accelerator for use in a simple corporate environment.
- Manage users and groups for use by the Accelerator.
- Work with documents and reports in the Accelerator.

Scope

This course describes the architecture, deployment and operation of the Accelerator. Labs are limited by what is technically possible to demonstrate in a classroom environment. An introduction to the extensibility and customization of the Accelerator will also be presented. The course does not teach the broader technologies of Windows SharePoint Services or Office InfoPath. In no way does this course attempt to review corporate internal control processes, auditing, or guidance regarding adhering to the Sarbanes-Oxley Act of 2002.

Course Timing

Day 1

Topic	Start	Length
Module 0: Introduction	8:30 am	15 min
Module 1: Introduction to the Microsoft Office Solution Accelerator for Sarbanes-Oxley	8:45 am	90 min
BREAK	10:15asm	15 min
Module 2: Deploying the Accelerator	10:30 am	60 min
Lab 2A: Installing the Accelerator Lab 2B: Exploring the Compliance Site Lab 2C: Adding the Welcome Message and Configuring an Alert	11:30 am	45 min
LUNCH	12:15 pm	60 min
Module 3: Securing the Accelerator	1:15 pm	60 min
BREAK	2:15 pm	15 min
Lab 3: Managing Users, Site Groups and Report Permissions	2:30 pm	30 min
END OF DAY	3:00 pm	

Day 2

Module 4: Configuring the Accelerator	8:30 am	45 min
Lab 4A: Editing Document Templates Lab 4B: Configuring the Site Structure	9:15 am	45 min
BREAK	10:00 am	15 min
Module 5: Using the Accelerator	10:15 am	60 min
Lab 5A: Working with Documents	11:15 am	45 min
LUNCH	Noon	60 min
Lab 5B: Viewing Available Reports Lab 5C: Backing Up the Configuration	1:00 pm	30 min
Module 6: Customizing the Accelerator	1:30 pm	60 min
BREAK	2:30 pm	15 min
Lab 6A: Customizing Reporting Views Lab 6B: Customizing the Compliance Site Home Page Lab 6C: Adding an External Component	2:45 pm	60 min
Q&A	3:45 pm	30 min
END OF DAY	4:15 pm	

Alternate Timings

This course is designed as two-day, instructor-led course. However, it may need to be delivered to audiences with different needs or when limited time is available. In these cases, use the following alternate timings.

Module	100 level – 2 hours	200 level - 1 day	300 level - 2 days
00 – Introduction	Complete module (15 min)	Complete module (15 min)	Complete Module (15 min)
01 – Introduction to the Microsoft Office Solution Accelerator for Sarbanes-Oxley	Pages 1 – 10 (45 min)	Pages 1 – 10 (45 min)	Complete Module (90 min)
02 – Deploying the Accelerator	Pages 1 – 2, 7 – 15, 23, Labs 2A, 2B and 2C (60 min)	Pages 1-2, 5 – 15, 23, Labs 2A and 2C (60 min)	Complete Module (105 min)
03 – Securing the Accelerator		Pages 1 – 2, 5 – end, Lab 3 (60 min)	Complete Module (90 min)
04 – Configuring the Accelerator		Pages 1, 5 – end, Labs 4A and 4B (60 min)	Complete Module (90 min)
05 – Using the Accelerator		Pages 1 – 5, 14 – 18, 22 (60 min), Labs 6A and 6B	Complete Module (135 min)
06 – Customizing the Accelerator		Pages 1 – 7, 9 – 11, 14, Labs 6A, 6B, and 6C (90 min)	Complete Module (120 min)

If the students complete the labs as identified above, save time by eliminating all demonstrations from the Modules. Optionally, this two-day course may be taught in one day by leading students through the labs as part of their respective Modules. When limiting the timing if this course, always eliminate the *User Scenarios* on page 12-13 in Module 5, *Using the Accelerator*.

Course Contact

This course was developed by Kelli Adam of ConnectOS Corporation at the request of Joel Frauenheim of IW New Markets Solutions Planning. Contact Joel at joelf@microsoft.com with questions or suggestions.

Course Outline

Day One:

Module 1: Introduction to the Microsoft Office Solution Accelerator for Sarbanes-Oxley

- Sarbanes-Oxley Legislation
- Logistics of Corporate Compliance
- What is the Accelerator?
- Four Capabilities of Accelerator
- Features of the Accelerator
- Assisting with Compliance Efforts
- Infrastructure of the Accelerator
- Software Components of the Accelerator
- Internet Information Services
- Windows SharePoint Services
- Microsoft SQL Server
- Microsoft Office InfoPath

Module 2: Deploying the Accelerator

- Options for Deployment
- Preparing to Install the Accelerator
- Installing Windows Server 2003
- Installing Windows SharePoint Services
- Installing the Accelerator
- Client Requirements
- Installing Office InfoPath 2003
- Deciphering the Site Address
- Administering using the Command-line Tools
- Navigating the Compliance Site
- Exploring the Compliance Site Home Page
- Exploring the Compliance Site Reports Page
- Configuring Alerts
- Introducing the Control Environment

Lab 2A: Installing the Accelerator

Lab 2B: Exploring the Compliance Site

Lab 2C: Adding a Welcome Message and Configuring an Alert

Module 3: Securing the Accelerator

- Steps to Configuring the Accelerator
- Compliance Roles
- Understanding Security Interaction
- Adding User Accounts
- Function of Site Groups
- Choosing Inheritance
- Assigning Permissions in the Accelerator
- User and Group Best Practices

Lab 3: Manage Users, Site Groups and Report Permissions

Day Two:

Module 4: Configuring the Accelerator

- The Corporate Control Environment
- Configuring the Control Environment
- Organizing the Site Structure
- Creating the Site Structure
- Selecting Document Types
- Configuring Document Templates

Lab 4A: Editing Document Templates

Lab 4B: Configuring the Site Structure

Module 5: Using the Accelerator

- Using the Accelerator Day-to-Day
- Navigating the Control Environment Page
- Working with Documents
- User Scenarios
- Generating a Report
- Exporting a Report
- Auditing Document Changes
- Maintaining the Configuration

Lab 5A: Working with Documents

Lab 5B: Viewing Available Reports

Lab 5C: Backing Up the Configuration

Module 6: Customizing the Accelerator

- Customizing the Compliance Site
- How to Create Custom Report Views
- Customizing the Compliance Site Layout
- Web Part Framework
- Services Provided by Partners

Lab 6A: Customizing Reporting Views

Lab 6B: Customizing the Compliance Site Home Page

Lab 6C: Adding an External Component