SharePoint Site Owner and Power User Boot Camp

Code: SP-2013-BC
Length: 3 days
URL: View Online

Learn how to tie the value of SharePoint to your corporate vision. Users that have some basic knowledge of navigating a SharePoint site will find this SharePoint training course the perfect class for learning and building on advanced SharePoint topics required by teams that want to get the full benefit of the powerful tools available in SharePoint. The class begins by teaching the student the first things they need to know about SharePoint. The student will learn what SharePoint is, how companies are using SharePoint, the business value of SharePoint, and a full understanding of using a SharePoint Site to realize the full scope of SharePoint tools to improve how the business communicates. Students will walk away knowing how to use the out-of-the-box Apps in SharePoint including Lists and Libraries and the advanced features available for information classification and management. The importance of the social features for making data more findable will be explored. How search is affected by user interaction via Tagging and Following will be explained clearly to you. Students will learn how Search is used to find information. This class teaches a great deal of “What You Don’t Know That You Don’t Know”.

- This SharePoint course is designed for SharePoint 2013, SharePoint 2016, SharePoint 2019, and SharePoint Online users. Labs are conducted in SharePoint 2019

Skills Gained

- Use Lists to create, edit and delete team information such as Tasks and Calendars
- Use Views to create reports to find the information you are looking for
- Architect Libraries to work on documents with your team more efficiently and how to manage information lifecycle with version control
- Classify and categorize your documents
- Use Tagging and Following to make information more findable.
- Use the Newsfeed to brainstorm, discuss and ideate with your team members
- Become a member of a Community and how to bring value to your team by driving engagement
- Create rich and informative Team Site portals by creating pages and utilizing the SharePoint Web Parts

Who Can Benefit

The target audience for this class includes users tasked with driving SharePoint from the day-to-day creation and management of information to driving user adoption and engagement. This class is targeted to users as opposed to administrators.

- Site Owner
- Content Editor
- Information Manager
- Site Administrator, Site Collection Administrator

- Project Manager
- Team Supervisor
- Librarian
- Any End User who needs a deeper dive into SharePoint

Course Details

Part 1: Introduction to SharePoint

1. What is SharePoint?

- What is “This” SharePoint Everyone is Talking About?
- Evolution of SharePoint – Where Did It Come From?
- Business Case for SharePoint
- SharePoint as a Tool in Support of Your Enterprise Vision
- Driving SharePoint From the Top Down
- Using SharePoint to Enable Team Collaboration and Drive Engagement
- Understanding and Defining SharePoint Roles

2. The Five Pillars of SharePoint – Breaking Down What SharePoint Can Do For You

- Share
- Organize
- Discover
- Build
- Manage

Part 2: SharePoint Architecture for the Users

- Web Application
- Site Collection
- Sites With Common Tools and Features
- Top-Level Site
- Site
- Site Components
- Child Sites
- Lists
- Libraries
- Pages
- Look and Feel
- Navigation

Part 3: Navigating SharePoint Sites

1. Tour of a Project Site 2. Site Components

- Suite Bar

- Top Link Navigation
- Quick Launch
- Tabs and Ribbons
- Share, Follow, Sync, Edit, Focus on Content
- Settings (Site Actions)
- Site Contents
- Recycle Bin
- Site Content Area
- Understanding URL’s and How to Use Them to Navigate
- IE Favorites
- Newsfeed
- List and Library Examples

Part 4: Working With Sites

- Definition of a Site – Why Do We Create New Sites?
- Site Components Revisited
- Site Templates Explained
- Site Settings and Features
- Creating Sites
- Initial Settings: Title, URL, Template and default Permissions, and Navigation
- Default Layout Based on Template Selection
- Editing Navigation: Top Link Bar and Quick Launch
- Site Settings
- Tree View
- LAB: Creating a Site Structure – Training Center Example
- Create a Site Collection Top Level Site
- Default Groups and Permissions
- Settings and Features
- Create a Child Site – SharePoint Training
- Simple site branding: Title, Logo, Composed Looks
- Navigation

Part 5: SharePoint Lists

- What are Lists
- Using Lists to Manage Business Processes
- List Architecture
- Content Types – Items
- Metadata
- Importance of Metadata – Never Too Much!
- Columns/Fields Types
- Views

- Available List Apps
- Creating Apps Using List Templates
- Creating Common Lists From Templates
- Building a Custom List
- Importing From Excel
- Exploring the List Toolbars
- Working With List Data
- Creating, Modifying, and Deleting Items
- Using the Different View Formats for Working With Items
- Using Basic Reporting Functions: Sort and Filter
- Working With the Tasks List App
- Parent/Child Tasks
- Using the Timeline
- Using the Different Views
- Advanced List Topics
- Validating a List Column
- Advanced Settings
- Deleting Lists
- Saving as a Template
- Enterprise Keywords
- Using Alerts
- Working With Views
- Exploring existing Views
- Creating a New View
- Class Activity: Architecting a “Class Roster”
- Explain Business Requirements
- Architect the List
- Metadata Requirements
- View/Report requirements
- Build the List
- Students Interact With List
- Create View
- Test View
- LAB: Working With Lists in the SharePoint Training Site
- Create Lists in the SharePoint Training Site
- “Training” Tasks
- “Training” Calendar
- “Instructor Availability” Calendar
- Custom “Classes” List

Part 6: SharePoint Libraries

- What are Libraries?
- Using Libraries to Manage Document Information Lifecycle in the Enterprise
- Library Architecture
- Content Types – Documents
- Metadata
- Importance of Metadata
- Folders vs Metadata
- Columns/Fields Types
- Views
- Available Library Apps
- Creating Apps using Library Templates
- Creating a Document Library
- Creating a Picture Library
- Exploring the Library Toolbars
- Working With Documents
- Adding Content to a Document Library With No Required Metadata
- New Document
- Saving Documents from Office
- Drag-and-Drop
- Upload Document
- Windows Explorer
- Adding Content to a Document Library With Required Metadata
- New Document
- Saving Documents from Office
- Using Version Control
- Upload Document
- Windows Explorer
- Drag-and-Drop
- Document Control Using Check In/Check Out
- Using Basic Reporting Functions: Sort and Filter
- Major Versions
- Major and Minor Versions
- Content Approval
- Advanced Library Topics
- Validating a List Column
- Advanced Settings
- Deleting a Library
- Saving as a Template (With Content)
- Working With Views
- Exploring Existing Views
- Creating a New View

- Class Activity: Architecting a “Client Records” Library
- Explain Business Requirements
- Architect the Library
- Metadata Requirements
- View/Report Requirements
- Build the Library
- Upload Documents to the Library
- Create View
- Test View
- LAB: Working With Libraries in the SharePoint Training Site
- Create Libraries in the SharePoint Training Site
- Create a Document Library
- Upload documents and Create New Documents
- Enable Version Control
- Work With Documents With Version Control
- Create a Picture Library
- Upload Pictures and Work With formats

Part 7: Access Control – Permissions Management

- Overview of Permissions and Security
- Groups
- Default Groups
- Creating Groups and Managing Group Membership
- Users
- Active Directory Integration
- Using Security Groups for SharePoint Access Control
- Permission Levels
- Roles-based Management
- Groups Represent Roles
- Groups are Assigned Permission Levels
- Where Permissions are Set
- Site, Lists and Items, Libraries and Documents
- Inheritance
- Using “Sharing” to Share Information
- Access Requests
- Best Practices
- LAB: Working With Permissions and Sharing Information
- Creating a Group
- Adding Users to a Group
- Assigning Permission Levels
- Sharing a Site and a Library

- Create and Edit Permission Levels

Part 8: Enterprise Content Management

- Importance of ECM
- Content Types
- Site Columns
- Content Types
- Managed Metadata
- Document Sets
- LAB: Working With Content Types
- Creating Site Columns
- Creating Content Types
- Using Managed Metadata
- Creating Document Sets

Part 9: SharePoint and Office Integration

- Connecting and Syncing Lists and Libraries to Outlook
- Project Pro Integration
- Exporting Data to Excel
- Site Mailboxes
- LAB: Connecting Lists and Libraries to Outlook
- Syncing the Task List
- Connecting a Calendar
- Connecting Contacts
- Exporting a List to Excel
- Creating a Site Mailbox

Part 10: Business Process Automation using Workflow

- OOTB Workflow
- Workflow Settings
- Workflow Administration
- Custom Using SharePoint Designer
- LAB: Using Workflow
- Creating an Approval Workflow
- Creating a Three-State Workflow
- Creating a Custom Workflow to Manage Documents

Part 11: Focus on Collaboration Tools to Drive Engagement

- Surveys
- Wiki
- Blog

- Newsfeed
- About Me
- Communities
- LAB: Using the Collaboration Tools
- Creating a Survey
- Creating a Wiki for Procedures Manual
- Creating a Blog
- Creating Your “Profile” / About Me
- Using the Newsfeed
- Following Colleagues, Documents, and Sites
- Creating a SharePoint User Group Community

Part 12: Designing a SharePoint Site to Drive Collaboration

- Pages
- Page Types
- Choosing the Right Page Type
- Creating Pages
- Web parts
- What are Web Parts
- Using the Common Web Parts
- Web Part Properties
- Page Design
- Creating Pages
- Page Layout
- Placing Components on Your Page
- LAB: Designing your Team Site
- Planning Your Page
- Creating a New Page
- Place Components and Web Parts on the Page
- Moving Items Around on a Page
- Best Practices

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