SharePoint 2013 Site Owner

Course Summary

Description

The SharePoint 2013 Site Administration course is written for people who will become "Site Owners" these people are critical in the success of your SharePoint environment. Site Owners create, manage and secure the components within SharePoint where people will store their business documents and collaborate.

Site Owners need to have an excellent understanding of some of the more complex parts of SharePoint including Site Customization, Security and Content Types, these topics are covered in detail during this course.

Topics

- Site Owner Responsibilities
- Creating and Managing Sites
- Permissions and Security
- Adding and Configuring Apps
- Adding & Managing Workflows
- Creating & Managing Content Types
- Document Lifecycle Management
- Site Customization

Audience

This course is designed for students who will become "Site Owners" these people are critical in the success of your SharePoint environment. Site Owners create, manage and secure the components within SharePoint where people will store their business documents and collaborate.

Prerequisites

This course is aimed at delegates that have already completed the two day SharePoint 2013 Introduction for End Users course or have equivalent experience.

Duration

Two days

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Course Outline

I. Site Owner Responsibilities

Site Owners are trusted with functionality that in other business systems would normally only be available to developers. As a new Site Owner it is important to know what is expected of you and what the best practices are. This module leads the site management course by discussing the delegate's role in creating sites, reasons for creating sites and the importance of securing the site before adding content.

A. Responsibilities of a Site Owner
B. SharePoint user model – IT, Site Owners and Site Members
C. Security
D. Structure
E. Site Content Ownership

II. Creating and Managing Sites

Fundamentally, site collections are composed of different site templates. In this module students will create each of these components to develop an enhanced understanding of each site's function and appropriate use.

A. Introduction to Site Topology
B. When to create a site and where?
C. How to create a new Site
D. Site Templates
E. Blogs
F. Community Sites
G. Site Settings
H. Deleting Sites

III. Permissions and Security

Security is an important element of any site collection. This module includes Instructor-led demonstrations of default groups. Thorough coverage of the use, creation, and application of custom permission levels provide students with comprehensive knowledge of the creation and management of sites. We also focus on security management best practices.

A. Introduction to Security in SharePoint 2013
B. Permissions, Permission Levels and SharePoint Groups
C. Manage User Access to a SharePoint Site

D. Manage SharePoint Groups and Users
E. Breaking Permissions Inheritance within the Site
F. SharePoint Security Best Practices

IV. Adding and Configuring Apps

Maintenance and use of lists apps and library apps are amongst the site owner's primary responsibilities. Well-constructed lists and libraries save users time and frustration, which translates to an effective gain for organizations. This module covers elements such as columns and views which are fundamental to this construction. Versioning and other library settings which can serve to enhance a list or library are also taught in this module. Features such as Document IDs, Document Sets and the Content Organizer are configured and tested. An introduction to on premise and SharePoint Marketplace apps is also included in this module.

A. Using list and library apps
B. Managing list & library properties
C. Creating list templates
D. Creating & managing columns
E. Site columns
F. Creating & managing views
G. Document IDs, Document Sets and the Content Organizer
H. Configuring advanced list & library settings
I. On premise apps
J. SharePoint Marketplace apps

V. Adding & Managing Workflows

Workflows are a powerful efficiency tool which can be used to organize and track process driven tasks. In this course, application and customization of these workflows is demonstrated using real world examples, as well as investigating how Visio and SharePoint Designer can be used to enhance the experience. Students are given the opportunity to build workflows and track workflow tasks.

A. Introduction to workflows
B. Workflow scenarios
C. Creating workflows
D. Configuring workflow settings
E. Adding workflows

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Course Outline (cont'd)

VI. Creating & Managing Content Types
Configuration of Content Types allows Site Collection Administrators and Site Owners to group attributes such as metadata, workflows and document templates into functional components. These Content Types can be managed in a dedicated site collection so that they can be shared across the entire SharePoint farm. This functionality allows for an enhanced user experience and reduced administrative overhead.

    A. Introduction to content types
    B. Creating & managing site content types
    C. Content type settings
    D. Document Sets
    E. The Content Type Hub
    F. Deploying content types

VII. Document Lifecycle Management
SharePoint supports an array of features to support the process of controlling the governance of documents in a business. This module will introduce delegates to the Records Center, information management policy settings and how to use workflows and the Content Organizer to manage document lifecycles.

    A. An introduction to governance
    B. Information management policy settings
    C. Disposition workflows
    D. The Records Center
    E. The Content Organizer

VIII. Site Customization
Fundamentally, site collections are composed of sites, basic pages, and Web Part pages. In this module students will create each of these components to develop an enhanced understanding of each item's function and appropriate use.

    A. The following lessons are covered:
    B. Adding Pages to your SharePoint Site
    C. Adding and Modifying Web Parts
    D. Deleting Pages
    E. Look and Feel Settings
    F. Modifying Navigational Components
    G. Creating Site Templates