

KOENIG SOLUTIONS · COURSE OUTLINE

SharePoint 2016 Site Collections and Site Owner Administration

Learn to build, configure and administer SharePoint 2016 site collections, from site structure and permissions to workflow and governance.

13

MODULES

84

TOPICS

58

HANDS-ON LABS

COURSE OVERVIEW

This course covers SharePoint 2016 terminology and navigation before moving into building a site collection with sites, lists, libraries and apps. It then addresses consistency tools such as site columns, content types and taxonomy, followed by permissions management, page design with web parts, and document and records management. Later modules cover workflow automation, Office integration, publishing sites, social features, search, portal governance planning, and site collection administrator settings.

WHO THIS COURSE IS FOR

Site Collection Administrators

Site Administrators

SharePoint Power Users

IT Support Staff

LEARNING OBJECTIVES

- Explain SharePoint 2016 terminology, navigation and admin roles
- Build a site collection using sites, lists, libraries and apps
- Apply site columns, content types and taxonomy for consistency
- Configure permissions and SharePoint groups within a site collection
- Implement pages, web parts and themes across a portal
- Manage documents and records including versioning, holds and eDiscovery
- Configure workflows and integrate SharePoint with Microsoft Office
- Plan governance and site hierarchies for a company portal

13 Modules, 84 Topics

01

Getting Started with SharePoint 2016

This module explains to site collection and site administrators how to discuss basic terminology and how to navigate around SharePoint 2016. Once administrators can explain basic terminology and how to navigate around SharePoint, they have a solid foundation for the rest of the course.

TOPICS

- Exploring SharePoint 2016 Site Collection and Site Administrator Roles
- Defining SharePoint Terminology
- Navigating a SharePoint Site
- Interacting with the Ribbon
- Creating and Editing Basic Content
- What is Metadata?

VERSIONS OF SHAREPOINT

- Standard
- Enterprise
- O365

02

6 Labs

Lab

Building a Site Collection with Apps

This module explains to site collection administrators how to create sites, document libraries and lists, as well as manage navigation. The first major milestone, after planning the company portal, is executing and building the site structure. The site structure includes the components for storing and presenting information namely sites, lists and libraries and apps, which are new to SharePoint 2016. Site structure provides the framework for the entire portal.

TOPICS

- The Structure of SharePoint
- Creating a Site
- What does a site template come with?
- Defining SharePoint Apps
- Customizing Lists and Libraries
- Creating/Managing Lists and Libraries through SharePoint Designer
- Explaining Views on Lists and Libraries
- Creating Views in Lists and Libraries
- Modifying Navigation
- Turning Site Features On/Off
- Reorganizing a Site using Site Content and Structure feature

Creating Consistency across Sites

This module explains to site collection administrators how to more efficiently manage their site collections, as well as maintain consistency throughout the site. When setting up a SharePoint site collection, it will often involve repeating a certain number of tasks. Site collection administrators can reduce the effort of duplication by creating reusable objects in a central location by using the tools provided.

TOPICS

Defining Site Columns · Defining Content Types · Implementing a Taxonomy · Using Templates to Promote Consistency

SharePoint Permissions

This module explains how permissions work within a site collection, and how the tools within SharePoint 2016 are used to manage and maintain them. It is crucial that SharePoint 2016 site collection administrators and site administrators are able to create and manage permissions within SharePoint 2016.

TOPICS

- Explaining Permissions and Security in SharePoint
- Creating SharePoint Groups
- Managing Permissions within SharePoint
- Sharing versus Traditional Security
- Sharing as different permission levels

Working with Pages and Web Parts

This module explains how to design a company portal using out-of-the-box web parts and themes in SharePoint 2016.

TOPICS

- Changing the Appearance of the Portal

EDITING A PAGE

- wiki
- web part

WORKING WITH WEB PARTS AND APP PARTS

- App Parts
- Content Search Web Part
- Relevant Documents
- Content query
- Table of Contents
- Pictures
- Web Part Connections
- Filter web parts
- Web parts with Targeting Audience

Document and Records Management

This module explains how to leverage document management tools included in SharePoint 2016. Whether a small company or a large enterprise, this module explores how any company can leverage SharePoint for versioning, compliance, routing and eDiscovery.

TOPICS

- Basic Content Approval
- Versioning
- Check In/Out
- Holds
- Retention Policy
- Document ID
- Content Organizer
- Compliance Policy Center Site Template
- EDiscovery
- Records Center

Workflow

This module explains how to automate business processes within an organization. The ability to initiate, track and resolve activity in SharePoint 2016 is possible through the use of a workflow. Whether using the pre-configured out-of-the-box workflow features or creating a custom workflow through SharePoint Designer, an organization can benefit from moving existing email, paper or informal processes into SharePoint.

TOPICS

Alerts · Out of the Box Workflow · Activating Workflow Features · Approval Workflow · Creating a Workflow in SharePoint Designer

Office Integration

This module explains how to connect SharePoint 2016 to Microsoft Office 2016. There are many ways such as connecting a SharePoint 2016 document library to Microsoft Outlook, linking an Access database or an Excel spreadsheet to a list in SharePoint 2016, or using Microsoft InfoPath to build SharePoint 2016 lists. The heavy integration of Microsoft Office 2016 is one of the main benefits of using SharePoint 2016.

OUTLOOK

Calendar · Contacts

Excel · Word · PowerPoint · OneDrive for Business · OneNote · Access

09

3 Labs

2 Labs

2 Labs

Creating Publishing Sites

This module explains how to use the publishing features of SharePoint 2016 to create rich content pages, as well as the features that limit the types of layouts, images and templates available to users. While some organizations need the document storage and dashboard capabilities SharePoint can offer, others may need a centralized way to distribute informational content to users, who will not otherwise interact with SharePoint in a more robust way.

TOPICS

Why use a publishing site? · Publishing Pages · Enabling Web Content Management · Managing the Structure of Web Content · Navigating a Site Using Managed Metadata

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4 Labs

4 Labs

Bridging the Social Gap

This module explains how to better perform internal talent management, also known as knowledge management. An important advancement in SharePoint 2016 is the expansion of social computing features. For example, an organization may need to find an individual with the specific skills and knowledge to assist in completing a task or project. SharePoint 2016 offers a viable platform to help organizations with talent or knowledge management.

TOPICS

My Sites · Configuring Social Features in SharePoint · Posts, Tags and Mentions · Creating a Community Site

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Lab

Finding Information Using Search

This module explains how to find information quickly and easily. Users can use the Search function within SharePoint 2016 to search across a variety of content sources including documents, people and line of business applications with little to no additional configuration. With a small amount of effort, organizations can create a robust search experience that is in alignment with their business needs.

TOPICS

Exploring the Search Features in SharePoint · Configuring Search Settings · Search Analytics · Search Visibility

12

Planning a Company Portal Using SharePoint

This module explains how to develop a formal governance plan and committee to maintain quality and consistency in SharePoint. To do this, it will introduce the concept of governance and highlight best practices. Governance defines policies, procedures and guidelines for how SharePoint will be managed; it outlines the roles, responsibilities and actions required to administer and support the SharePoint environment.

TOPICS

Defining SharePoint Governance · Working with Information Architecture · Implementing Site Hierarchies · Discussing the Execution of Governance

Site Collection Administrator Settings

This module explains how to use other tools and settings in SharePoint 2016. Site collection administrators or site administrators configure these as part of their day-to-day activities.

TOPICS

- Exploring Settings for Site Collection Administrators
- Exploring Settings for Site Administrators
- Site Closure Policies

HANDS-ON LABS

Practise What You Learn

#	MODULE	ACTIVITY
02	Building a Site Collection with Apps	■ Creating a Structured Company Portal ■ Create sites as part of a formal site structure ■ Create new apps for documents and lists ■ Enable versioning and content approval settings on libraries or lists ■ Customize views on libraries or lists ■ Configure navigation to hide lists and libraries ■ Creating a List Using SharePoint Designer (Optional)
03	Creating Consistency across Sites	■ Creating Site Columns and Content Types ■ Design and implement content types ■ Create new site columns ■ Create a library or list template (optional) ■ Implementing a Taxonomy ■ Design and create taxonomy ■ Add managed metadata columns ■ Configuring the Content Organizer ■ Customize default column values on a per-folder basis ■ Provision and configure the Content Organizer for automated document routing
04	SharePoint Permissions	■ Managing Permissions in SharePoint ■ View permissions of SharePoint objects ■ Add users and groups to SharePoint objects ■ Create a new SharePoint managers group with customized permissions ■ Stop inheriting permissions between SharePoint objects

#	MODULE	ACTIVITY
05	Working with Pages and Web Parts	■ Adding and Configuring Web Parts ■ Create custom content types for publishing ■ Create a list template ■ Create a managed property ■ Use Content Search Web Part ■ Connecting Web Parts ■ Place web parts on a page ■ Connect web parts on a page to pass values between them ■ Applying Themes to Your Company Portal ■ Customize and apply a theme to your portal ■ Add a logo to your portal
06	Document and Records Management	■ Working with Advanced Document Management Features ■ Leveraging Records Management to Preserve Data ■ Configure a Records Center to house documents requiring a hold ■ Configure in-place records on libraries ■ Set up and leverage an eDiscovery Center
07	Workflow	■ Creating an Approval Workflow from SharePoint ■ Creating a Custom Workflow in SharePoint Designer (Optional)
08	Office Integration	■ Importing and Exporting Excel Data with SharePoint ■ Linking Outlook and SharePoint
09	Creating Publishing Sites	■ Creating a Rich Publishing Site ■ Create a web content management site for publishing news ■ Set up and use image renditions for faster image management ■ Configuring a Publishing Approval Process ■ Add an approval process to your publishing site ■ Implementing a Managed Navigation Site ■ Set up and use the Managed Metadata navigation
10	Bridging the Social Gap	■ Designing a Social Experience in SharePoint 2016 ■ Enable content ratings ■ Configure RSS feeds ■ Manage user profiles ■ Creating a Community Site ■ Create and configure a community site ■ Create and manage discussions ■ Recognize users who contribute to the community
11	Finding Information Using Search	Configuring an Advanced Search Center

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

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