SharePoint 2013 Training

Administration

Intended for: Enterprise Content Manager   /   Administrator
                    Forms and Workfows Designer   /   Business Intelligence Analyst

Prerequisites: None

OVERVIEW

The SharePoint Administration class is about enterprise content management, making information consistent across the entire SharePoint deployment. SharePoint provides many advanced document management and information architecture tools that are not obvious out of box, and the goal of this class is understand how these features work and integrate.

Learn all the topics covered in the Fundamentals course plus:

- Learn site collection management and understand when to create separate site collections
- Use site columns, managed metadata service, and content types to keep metadata consistent across site collections
- Utilize document sets to apply workflows, metadata, and versions to a collection of documents
- Manage user profiles, audiences, and promoted sites
- Administer search content sources, managed properties, search centers, and search refinement web parts
- Understand query rules and entity extraction in search
- Create external content types and lists using SharePoint Designer
- Create publishing pages, layouts, and master pages using SharePoint Designer and Design Manager
- Learn how eDiscovery can help with compliance.
- Test all of your enterprise content management skills by completing the final project

1. **Definitions, History, and Expectations**

   - Definitions
   - History
   - Editions
   - How to Make SharePoint Successful

2. **Sites Organization**

   - Content Creation and Organization
     - o Site collection
     - o Site
     - o Top link bar
     - o App launcher
   - Site navigation
     - o Quick launch bar
     - o Site contents
   - Site Templates and Features
     - o Features
     - o Site template comparison List specific features

3. **List**

   - Columns
   - Filters and metadata navigation
   - Views
   - Form configuration
   - Versions
   - Alerts
   - Large lists and indexed columns Pages, Web Parts, Apps, and Themes

4. **Documents**

   - Columns, views, managed metadata
   - Editing documents
     - o Co-authoring and track changes
     - o Using Office Online

- Versions
  - When are version created
  - Check out - check in
  - Major, minor, and approval
- Syncing using OneDrive Pro
- Folders vs. metadata

5. Tasks and Calendars

- Tasks
  - Organize for project management
    - Indents
    - Timeline
  - Stay informed
    - Email notifications
    - Tasks app and Outlook integration
- Calendars
  - Views
  - Connect to Outlook
  - Overlays in SharePoint

6. Search and Delve

- List search
- Site search and search center
- Delve – a new search and findability experience

7. Basic Workflows

- Definitions
- Review and Approval workflows
- Create workflow association
- Start a workflow on a item
- Participate in a workflow

8. Web Parts, Apps, Pages

- Web Parts
  - Adding to the page
  - Properties
- Apps
  - App store
- Types of Pages

9. Newsfeed, User Profile, Personal Site

- My site
- Newsfeed
- User profile
- Personal site

10. Security

- Authentication vs. authorization
- Permission levels
- Site collection administrator
- Azure Active Directory role - auditing user activity
- SharePoint groups
- External users

11. List and Site Templates

- List and site templates
- List thresholds
- Site content and structure tool from Publishing Infrastructure Feature

12. Project: Libraries and Lists

- Research documents
  - Large document library (not collaborative)
  - Permissions by folder
  - Views without folders
  - Metadata creation and navigation
- Project site management
  - Project directory
  - Project site template

13. InfoPath in SharePoint

- Form Design
  - o Fields / columns
  - o Visual layout
  - o Logic and rules
  - o Validation
  - o External data
- InfoPath Form Web Part
- List forms vs. form library

14. Workflows with SharePoint Designer 2013

- Introduction
- Two platforms
- Terminology
- Workflow types and association
- Security – app step
- Information management polices

15. Workflows web services

- JSON and dictionary actions
- SharePoint REST APIs
- Read and write data from SharePoint

16. Workflow deployment

- Move
- List template
- Update

17. Business Intelligence Introduction

- Definition
- Information collection, analysis, and delivery
- Microsoft product descriptions

18. Excel and Data Modeling

- Excel Data Model
  o Create tables
  o Identify relationships
  o PowerPivot – advanced data model manipulation
- Presentation
  o Pivot tables and charts
  o Slicers and conditional formatting
  o PowerView
- Publishing to SharePoint
  o Publishing options and permissions
  o Pages and web parts

19. External Connections and Data Refresh

- External Connections
  o SharePoint Lists – OData Feed
  o Azure SQL Server
- PowerBI App
  o Enable Data Refresh
- Data connection details
  o Location
  o Authentication
  o Secure Store

20. Excel with PowerPivot

- Import data and create relationships
- Calculated columns and DAX
- Measures, hierarchies, and KPIs
- PowerBI Admin Center

21. Excel PowerQuery

- Getting data using PowerQuery

22. Excel PowerMap

- Use PowerMap

23. PowerBI Admin Center

- Gateways and datasources

<div style="background:red;color:white">SECTION 4 - Administration</div>

24. Site Collection Management

- Definition
- Why separate site collections
- Management

25. Site Columns

- Definition
- Scopes and updates

26. Managed Metadata - Taxonomy Term Store

- Terms sets and term groups
- Choice Column vs. Managed Metadata Column
- Enterprise keywords
- General Recommendations for Taxonomy Development

27. Content Types

- Content type information architecture
  - o Hierarchies and inheritance
  - o Document templates
  - o Workflows
  - o Information management policies

- Use cases
- Content Type Syndication Hub

28. Document sets

- Metadata and page layouts
- Versioning and workflows

29. User Profiles

- User Profiles
  - Properties
  - Settings
  - Permissions
  - Audiences
- My Sites
  - Configuration
  - Promoted sites

30. Search Administration

- Search administration
- Search Schema – properties and refiners
- Content search web parts
- Query suggestions
- Query rules
- Analytics

31. Final Project

- Metadata and Search

32. EDiscovery

- eDiscovery cases
  - eDiscovery sets
  - Sources
  - Custodians
  - Queries

33. Using PowerShell in SharePoint Online