

## Course Syllabus

Course Title: SharePoint Server SE for Power Users

Elements of this syllabus are subject to change.

### About the course

SharePoint Server SE for Power Users" is the Community Courseware version of 20339-1AC "Planning and Administering SharePoint 2016.

This 4-day course delivers the complete site owner story from start to finish in an engaging and practical way to ensure you have the confidence to plan and create new sites or manage your existing sites in SharePoint Server Subscription Edition. Your goal is to learn how to make SharePoint Server SE relevant to your team by using a sites functionality to help you share information and collaborate with your colleagues. During the class, you will also learn best practices and 'what not to do' as you study and put theory into practice with hands on exercises in SharePoint Server SE.

### Audience

The intended audience for this course may vary between delegates that have had little to no exposure to SharePoint Server SE to users that have had some level of engagement with the product but are looking to broaden their skill set.

### At Course Completion

Describe features of SharePoint Server SE

Create, and structure team sites, communication sites, hub sites and a home site

Create rich web pages for displaying interactive content

Organise content in lists and libraries utilising a wealth of features to compliment a wide-ranges of uses

Automate common business processes and customise digital forms

Manage a sites security ensuring your users have the right access to the right content

Leverage SharePoint Server SE's powerful search capabilities to acquire content quickly

Set up policies, retention, records and more to manage content across multiple sites

### Prerequisites

Before attending this course, students must be:

Proficient in navigating web sites

Familiar with navigating Windows operating systems and using file explorer

## Module 1: An introduction to SharePoint

Let's get started with SharePoint Server SE by letting you know about its fantastic selection of features. We will demonstrate popular uses of SharePoint Server SE to manage and share content, create engaging web page, automate business processes, and make good business decisions with Business intelligence.

We will also discuss who will be the typical users in our sites and the role of the site collection administrator. Site Owners are trusted with functionality that in other business systems would normally only be available to developers. As a new Site Owner, we're sure that you will be amazed with the potential that SharePoint Server SE has to offer an end user.

### Lessons

What is SharePoint?

Introducing SharePoint Server SE and SharePoint Online

What is the cloud and what is on-premises?

Ownership and access

### Lab 1: Download content pack

Download the course content pack

Extract the zip file

After completing this module, students will be able to:

Explain the difference between SharePoint in the cloud and an on-premises installation of SharePoint

Describe the core features of SharePoint

Explain the range of roles that are required to manage a series of SharePoint sites from end user to administration

Understand who would be best suited for the role of site owner within a site

## Module 2: Creating sites

Whether you are managing existing sites, or you have not yet started, we will complement your current situation by discussing site hierarchy and planning your SharePoint sites. This will allow you to understand existing sites that other people have created as well as making good decisions when building new sites.

As a site owner, you will be presented with a selection of site templates. You will use a variety of popular site templates to develop an enhanced understanding of each sites function and appropriate use. Once

your site is ready, we will then change the look and feel of your site. You can even try applying your business brand to your test site. We will also build our navigation bar, a simple but powerful way to help users move between websites.

Lessons

Planning your sites

Central administration

Web addresses

Lab 1: Creating a new site

Create a new team site

Create a subsite

Update the top link bar

Customise the site theme

Delete and restore a subsite

Set up a hub site

Link a site to a hub site

Update the hub site navigation

After completing this module, students will be able to:

Describe what a site collection is and how it can be used to manage multiple sites

Explain the purpose of central administration and its role in provisioning site collections

Understand the various ways to create sites

Discuss the legacy role of subsites

Manage a sites navigation and theme

Implement hub sites as a modern alternative to subsites

Align top level sites to a hub

Describe the role of a home site in the app bar and the SharePoint mobile phone app

## Module 3: Creating and managing web pages

SharePoint boasts a rich selection of ways to build web pages. You will learn how to update the home page of your SharePoint site with text, links, images, videos, and web parts. We will also show you best practices when creating multiple pages and linking them together. In most site templates, creating and managing web pages is a simple, fast, and rewarding way to present essential information and apps. Also covered are SharePoint spaces, a type of page that supports Virtual Reality.

SharePoint can also be used as an Intranet for internal news. Due to the high visibility of these web sites, it is common to place more control over the release of new web pages or updates to existing pages. For this reason, SharePoint has publishing sites and communication sites.

### Lessons

Introducing pages

The types of pages found in SharePoint

Modern SharePoint pages

Create news and site pages

Sections

Web parts

Save, publish, share, and delete pages

SharePoint spaces

Communication sites

Classic SharePoint pages

How to use classic team site pages

Review features of classic publishing sites

Lab 1: Designing web pages

Create a new news article

Implement sections and web parts

Publish and share your news

Create a communication site

Add your communications site to your hub site

After completing this module, students will be able to:

Qualify the purpose of the different types of modern SharePoint page

Describe the purpose of a communication site

Use a range of web parts to add rich content to a page

Distribute your pages to others in your organisation

Be aware of classic SharePoint wiki, publishing, and web part pages

#### Module 4: Installing, Upgrading, and Migrating to Windows 7

Apps are required to store information such as events, contacts, and files in a site. SharePoint provides a selection of apps for different scenarios, all with the option to be customised for a specific business requirement. Apps can be broken down into Lists, Libraries and Market Place Apps.

SharePoint lists serve as the structure for calendars, discussion boards, contacts, and tasks. This module explains the concept of lists, and then reviews popular options.

A document library is a location on a site where you can create, collect, update, and share files including Word, Excel, PowerPoint, and PDF. We will show you the benefits of using a library and teach you how best to work with files in a library.

An introduction to on premises and SharePoint Marketplace apps is provided to show how to extend site functionality beyond what Microsoft has provided in the SharePoint Server SE platform.

#### Lessons

An introduction to apps

#### Lab 1: Designing lists and libraries

Create a new library

Set up columns

Adding new views

Upload content

Set up an alert

Use version control for a file

Create a new list

Delete and restore an app

After completing this module, students will be able to:

Describe when to use a list, library, or an app from the marketplace

Configure columns to manage document tagging and item creation

Design views to tailor what users see in the list

Explain the benefits of views over traditional file management like folders

Configure an apps settings to best complement your type of data

Implement document sets for managing groups of files

Manage content within an app

Securely share information from SharePoint apps

Recover content and understand the duration of the recovery period

Benefit from the OneDrive sync tool for working offline or via file explorer

Be aware of classic SharePoint lists

## Module 5: Building processes with workflows and forms

Businesses depend on business processes. SharePoint gives users the ability to automate some of those business processes using workflows. Workflows allow you to track items within a list or library, distribute tasks to obtain approval or feedback on an item, or to determine whether an item should be deleted or retained, or to request digital signatures within Microsoft Office files.

This module introduces you to workflows - what they are and how they can be used in a business environment. You will learn the types of workflows which are available in a standard SharePoint Server SE implementation, and how to deploy them to lists, libraries and content types. In addition, you will learn how to monitor workflows once they have been started and check the history of current or completed workflows.

When working with business processes, often digital forms, rather than documents are used to capture information. We will look at options for customising the way data is captured through list forms to ensure it carries the same business logic as the workflow.

### Lessons

What are business processes?

Design and test an out of the box workflow

Built in workflows

Third party solutions

Creating and configuring custom workflows

Configuring workflow settings

Starting a workflow

Workflow scenarios

Customising list forms

Edit columns

Edit using JSON

An introduction to Power Automate

An introduction to Power Apps

Lab 1: Building processes with workflow

Switch on workflows

Create a new approval workflow

Testing the workflow

Customising a list form

After completing this module, students will be able to:

Understand the range of options available for customising workflows and forms

Utilise out of the box features to design automated business processes

Test published workflows in a SharePoint site

Manage a published workflow

Delete unwanted workflows

Customise list forms using the built in column editor

Customise list forms with JSON

Revert forms back to their basic settings

Be aware of cloud tools such as Power Automate and Power Apps

Module 6: Customising security

Security is an important element of any site. You will see demonstrations of the best practices for adding and removing colleagues from your site and defining their level of access. As a site owner, you can customise permission levels. This means that you can create levels of access that are aligned with the responsibilities of your site's users. An example of this would be allowing a group of users the ability to upload content but not delete content. Additionally, we will focus on locking down or opening areas within your site to make it more tailored for your needs. You will also see how to use the Share button to quickly share documents with other users.





## Lessons

Managing access to SharePoint

Setup access requests

Manage sharing rights

Share a site

Share a file or folder

Remove a user

Customising SharePoint security

Create permission levels and groups

Security inheritance

Security best practices

Lab 1: Customising security

Share a file with a colleague

Create new permission levels

Create a new security group

Add and remove users

Modifying inheritance of an app

Modifying inheritance of a folder

After completing this module, students will be able to:

Adhere to best practices when managing security in a SharePoint site

Perform day to day management of SharePoint security tasks such as adding and removing users

Customise SharePoint security by creating permission levels and groups

Modify the inheritance of your site's security

## Module 7: Working in Search

SharePoint provides the ability to store vast amounts of content in a variety of locations. This module covers a set of tools which help you to efficiently locate the information you need. While SharePoint's search is rich and intelligent, site owners can make customisations to search to improve its relevance to an organisation. We will show common techniques used by site owners to improve search results by promoting specific content when a certain keyword is used.

## Lessons

An introduction to SharePoint search

Search in folders, libraries, lists and sites

Search results

Search tips

Promoting results

## Lab 1: Working with search

Conduct an app search

Search a site and search all sites

Optional: Create a promoted result

After completing this module, students will be able to:

Understand and describe what content will appear in a user's search based on security trimming

Utilise search filters to reduce a large result down to a usable number of items

Know about contextual searches, and how to escalate your search

Understand the role of hub sites in search

Understand of the extend of how keywords are indexed

## Module 8: Enterprise Content Management

Traditionally teams make use of file templates or manual processes to ensure information is collected and retained correctly. This may be a choice your team makes or a decision that is more universal across your organisation. In this module, we will help your team establish reusable file templates and automate document lifecycle management. An example of this would be removing old unwanted content from your site automatically.

To achieve this, you will learn about a variety of SharePoint features including managed metadata, content types, policies, in-place records management, and the content organizer.

## Lessons

Managed metadata service

An introduction to content types

Create and manage content types

Deploy content types

Using content types in apps

The content type hub

Information management policies

The records center

In-place records management

The content organizer

Durable links

Lab 1: Enterprise content management

Create site columns

Create a new content type

Deploy a content type

Set up in-place records management

After completing this module, students will be able to:

Describe the range of features that can be used to manage content consistently across multiple site collections

Design and deploy content types

Implement organisation policies to define retention of business content

Automatically move business content to areas like the records center by utilising the content organizer

Understand and use in-place records management when a records center isn't the right solution

Describe the purpose of a records center