



CL_55294

Sharepoint Power User



About this course.

This SharePoint Power User training class is designed for individuals who need to learn the fundamentals of managing SharePoint sites.

Length.

2 Days.

Audience profile.

This course is intended for individuals with end user experience who need to learn the fundamentals of managing SharePoint sites.

Course outline.

Module 1: Module 1: Content Approval.

Content approval can be used on both lists and libraries in a SharePoint site. With content approval enabled, you have additional options to control the visibility of terms. Content approval is enabled through the list/library settings page. Content can be approved manually through the context menu and toolbar of an item or it can be automated with workflows. SharePoint includes a workflow specifically for approving content.

- Enabling Content Approval.
- Content Approval Workflows.

Labs:

- Enabling and Using SharePoint.
- Content Approval Enabling and Using SharePoint Approval Workflow.

Module 2: Creating Custom Workflows with SharePoint Designer.

Workflows are a popular way to perform automated work in SharePoint. Any type of automation you require from SharePoint, whether it be approving items or notifications with email, a workflow is the most common way to get it done. SharePoint comes with extra out-of-box workflows that can be associated and configured with lists and libraries using just the browser. Custom workflows can be created with software applications such as SharePoint Designer or Visual Studio.

- Workflow Basics.
- Custom List Workflows.
- Workflow Actions.
- Workflow Stages and Conditions.
- Workflow Initiation Form.
- Site Workflows.

Labs:

- Creating Custom Workflows.
- Site Workflow with Looping.



Module 3: Working with Managed Metadata.

The Managed Metadata service in SharePoint Server provides central term storage and management. The Term Store is what allows you to have common sets of terms that can be shared across all sites and site collections within a farm.

- Creating a Term Store Group and Term Set.
- Creating Metadata Columns in Lists and Libraries.
- Publishing Content Types.

Labs:

- Creating a Term Store Group and Term Set.
- Creating Managed Metadata Columns.

Module 4: Business Connectivity Services.

Business Connectivity Services is a free service that comes with the Foundation version of SharePoint. The service enables administrators to create external lists linked to data outside of SharePoint.

- Business Connectivity Services Basics.
- Creating an External Content Type with SharePoint Designer.
- Creating a List from an External Content Type.

Lab: Working with External Content Types and Lists.

Module 5: Information Management Policy.

SharePoint's Information Management Policies are used to perform various automated actions on list and library items based on date properties. The built-in time formula can be based on either the date the item was created, modified, or declared record.

- Information Management Policy Basics.
- Define an Information Policy for a Content Type.
- Defining an Information Policy for a List.

Lab: Create an Information Management Policy for a List.

Module 6: Content Organizer.

Content Organizer is a SharePoint feature, which only comes with the pay versions of SharePoint, that provides document routing

from a drop-off library. The feature is enabled at the site level and the drop-off library is created as part of the feature activation. Once the drop-off library is created, you can define rules that route documents placed in the drop-off library to their final destination.

- Activating the Content Organizer Feature.
- Configuring Content Organizer Settings.
- Configuring Content Organizer Rules.

Lab: Activating and Configuring the content Organizer Feature.

Module 7: Document ID Service.

SharePoint's Document ID service, available with the pay versions of SharePoint, creates unique IDs for documents that are prefixed with text the Site Collection Administrator defines. What's more is that the ID assigned to the document creates a fixed URL that can be used to link to the document even if it is moved to another library or site. The Document ID service can only be used on documents and cannot be used on list items.

The Document ID service is enabled at the Site Collection level by activating a feature. Once the service is activated the Site Collection Administrator can define the prefix string to be used. SharePoint uses a Timer Job, Document ID assignment job, to set the IDs on existing documents once the Document ID Service has been activated. The Timer Job runs every 24 hours by default so existing documents will not have the IDs until the job has run. A Farm Administrator can manually run the job to have the IDs created sooner. New documents will have IDs created when the document is saved to the library.

- Activating the Document ID Feature.
- Configuring Document ID Settings.
- Linking Document ID Settings.

Lab: Activating and Configuring the Document ID Service.

Module 8: Document Sets.

SharePoint's Documents Sets are like enhanced versions of folders. As with folders, you primarily use them to group similar





documents together. They are enhanced with the ability to have their own metadata, workflows, and home page. To use Document Sets, the feature must be active at the Site Collection level. Once activated, there will be a new Document Set content type in the Site Collection's content type gallery.

To best take advantage of the enhancements offered by Document Sets, you should create custom content types that inherit from the Document Set content type.

- Activating the Document Sets Feature.
- Creating a Document Set Content Type.
- Adding a Document Set Content Type of a Library.

Lab: Configuring Document Sets Feature.

Module 9: SharePoint Server Publishing Infrastructure.

SharePoint's publishing infrastructure provides an enhanced way to create and store information displayed through the site's web pages. The publishing infrastructure can be enabled by activating features at both the site collection and site level.

- Activating the SharePoint Server Publishing Infrastructure.
- Publishing Infrastructure Basics.
- Creating Pages with Page Layouts.

Labs:

- Activating Publishing Infrastructure.
- Creating Publishing Pages.

Module 10: Configuring and Consuming Site Search Results.

SharePoint comes out-of-the-box with search capabilities. With proper configuration SharePoint search is scalable to content sources containing millions of items.

- Search SharePoint for Content.
- SharePoint Search Center.

Lab: Basic SharePoint Search.

