

**Module Title : Course 55194 : SharePoint 2016 Site Collection and Site Administration**  
**Duration : 5 days**

## Course Description

This five-day instructor-led course is intended for power users and IT professionals, who are tasked with working within the SharePoint 2016 environment; they conduct site collection and site administration. This course will provide a deeper, narrowly- focused training on the important and popular skills needed to do SharePoint site collection and site administration with SharePoint 2016 deployed on-premise in Office 365 (SharePoint Online), or a hybrid deployment (on-premise connected to Office 365).

## Audience

» This course is intended for those who provide site collection and site administration and are power users or IT professionals. They are tasked with supporting or working within the SharePoint 2016 environment on-premise and/or in Office 365.

## Prerequisites

- » Windows client operating system - either Windows XP, Windows 7, Windows 8 or Windows 10.
- » Microsoft Office 2007, Office 2010, Office 2013 or Office 2016.
- » Microsoft Internet Explorer 7 or later, or similar web browser.
- » It is recommended that students have familiarity with previous versions of SharePoint, although it is not a required prerequisite.

## At Course Completion

- » Design and implement a company portal structure using SharePoint 2016 objects including sites, libraries, lists and pages
- » Explain the role of security and permissions throughout SharePoint 2016
- » Implement guidelines for consistency in building a company portal to aid in the day-to-day administration of content in SharePoint 2016
- » Enhance the design and content of a company portal using SharePoint 2016 pages and web parts
- » Explain the importance of governance for planning and managing future growth of SharePoint 2016 implementation
- » Identify options to integrate data from other systems such as Microsoft Office, as well as preserve existing data
- » Explain the role of social networking in SharePoint 2016 and its impact on collaboration

## Course Outline

### Module 1: 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.

#### *Lessons*

- 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

After completing this module, students will be able to:

- Define SharePoint 2016 roles and terminology.
- Navigate SharePoint 2016.
- Utilize functions available in the Microsoft ribbon.
- Create and add basic content to SharePoint.

### Module 2: Creating a Company Portal

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.

#### *Lessons*

- Creating a Site Structure
- Defining SharePoint Apps
- Customizing Lists and Libraries
- Explaining Views on Lists and Libraries
- Creating Views in Lists and Libraries
- Modifying Navigation

*Lab: Creating a Structured Company Portal*

*Lab: Creating a List Using SharePoint Designer*

After completing this module, students will be able to:

- Implement a site structure.
- Add and customize apps.
- Create and customize views.
- Modify site navigation.

### Module 3: 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.

#### *Lessons*

- Defining Site Columns
- Defining Content Types
- Implementing a Taxonomy
- Configuring the Content Organizer
- Using Templates to Promote Consistency

*Lab: Creating Site Columns and Content Types*

*Lab: Implementing a Taxonomy*

*Lab: Configuring the Content Organizer*

After completing this module, students will be able to:

- Create new site columns.
- Design and implement content types.
- Implement a taxonomy using the Managed Metadata Service.
- Define site and list templates.
- Define best practices around creating consistency.

### Module 4: Securing a Company Portal

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.

#### *Lessons*

- Explaining Permissions and Security in SharePoint
- Creating SharePoint Groups
- Managing Permissions within SharePoint
- Sharing versus Traditional Security

*Lab: Managing Permissions in SharePoint*

After completing this module, students will be able to:

- Explain the concept of sharing.
- Design and implement security.
- Describe best practices around SharePoint 2016 security.

### Module 5: 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.

### *Lessons*

- Changing the Appearance of the Portal
- Editing a Page
- Working with Web Parts and App Parts
- Targeting Audience with Content

*Lab: Adding and Configuring Web Parts*

*Lab: Connecting Web Parts*

*Lab: Applying Themes to Your Company Portal*

After completing this module, students will be able to:

- Implement themes and add a logo.
- Add web parts to pages.
- Leverage audiences for targeting content.

## **Module 6: Managing Document and Records**

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.

### *Lessons*

- Managing Libraries
- Setting up Compliance Policies
- Implementing Content Organizer and Records Center
- Using the EDiscovery Center

*Lab: Working with Advanced Document Management Features*

*Lab: Leveraging Records Management to Preserve Data*

After completing this module, students will be able to:

- Implement versioning and approval.
- Create a compliance policy.
- Configure a Records center.
- Create queries and export results with the EDiscovery Center.

## **Module 7: Creating a 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.

### *Lessons*

- Creating an Out of the Box Workflow
- Creating a Workflow in SharePoint Designer

*Lab: Creating an Approval Workflow from SharePoint*

*Lab: Creating a Custom Workflow in SharePoint Designer*

After completing this module, students will be able to:

- Create an Approval Workflow.
- Create a Workflow in SharePoint Designer.

## **Module 8: Integrating with Microsoft Office**

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 2010 lists. The heavy integration of Microsoft Office 2016 is one of the main benefits of using SharePoint 2016.

### *Lessons*

- Linking Outlook with SharePoint 2016
- Importing and Exporting Data with Excel and SharePoint 2016
- Linking Access and SharePoint 2016
- Creating InfoPath Forms
- Exploring OneDrive for Business

*Lab: Importing and Exporting Excel Data with SharePoint*

*Lab: Linking Outlook and SharePoint*

After completing this module, students will be able to:

- Describe the integration features between Office 2016 and SharePoint 2016.
- Link the Calendar and Contact features available with Outlook 2016 to SharePoint 2016.
- Identify how Excel interacts with SharePoint 2016.
- Explain the integration of Access with SharePoint 2016.
- Have a basic understanding of how InfoPath 2013 works with SharePoint 2016.

## **Module 9: 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.

### *Lessons*

- Enabling Web Content Management

- Managing the Structure of Web Content
- Navigating a Site Using Managed Metadata
- Configuring a Publishing Approval Workflow

*Lab: Creating a Rich Publishing Site*

*Lab: Configuring a Publishing Approval Process*

*Lab: Implementing a Managed Navigation Site*

After completing this module, students will be able to:

- Enable web content management.
- Create a Managed Metadata navigation site.
- Implement image constraints.
- Define the structure of pages.
- Implement a publishing workflow.

### **Module 10: 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.

#### *Lessons*

- Configuring Social Features in SharePoint 2016
- Creating a Community Site

*Lab: Designing a Social Experience in SharePoint 2016*

*Lab: Creating a Community Site*

After completing this module, students will be able to:

- Describe the role of social computing in SharePoint 2016.
- Describe best practices for implementing social collaboration.
- Design a social experience.
- Implement a community site leveraging the social computing features of SharePoint 2016.

### **Module 11: 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.

#### *Lessons*

- Exploring the Search Features in SharePoint 2016

- Configuring Search Settings

*Lab: Configuring an Advanced Search Center*

After completing this module, students will be able to:

- Create an enterprise Search Center.
- Customize the Search Center.

### **Module 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.

#### *Lessons*

- Exploring Governance for Site Administration
- Discussing the Execution of Governance

After completing this module, students will be able to:

- Explain the role of governance for SharePoint.
- Develop a governance plan and team.

### **Module 13: Exploring 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.

#### *Lessons*

- Exploring Settings for Site Collection Administrators
- Exploring Settings for Site Administrators

After completing this module, students will be able to:

- Identify additional settings for site collection administrators.
- Identify additional settings for site administrators