Global Reach. Local Service.

Synergy Productivity Training Series

SharePoint 2013 Site Administrator

Course Outline

The purpose of this 2-day long course is to give site administrators an understanding of the management requirements for administering SharePoint 2013 web sites, plus the associated tool set for performing related tasks. SharePoint 2013 was created to empower organizations by allowing for administrative control of information assets at the location where these assets are best managed within the organization's business units. This course provides the background and technical skills for site administrators to support of the information management goals of the organization.

Skills Gained
After completing the course students will:
- Understand the role of site administrators in the SharePoint 2013 context
- Know site management functions
- Understand the site life cycle process, including site creation, management, and disposition
- Be able to use site templates to create sites and navigate a site hierarchy
- Understand site feature activation and management
- Be able to customize and manage the site interface look and feel, including site navigation
- Know how to manage lists and libraries
- Be able perform and understand site monitoring activities
- Understand and be able to implement security using permissions

Target Audience

The course is designed for users who will be managing libraries and lists, and administering sites and workflows in SharePoint 2013 as list administrators or site owners.

Prerequisites

Experience with SharePoint 2013 is required. In lieu of experience, students can attend Synergy's course SharePoint 2013: Information Worker and SharePoint 2013: Content Manager to meet the prerequisite.

1. **Site Administration in SharePoint 2013**

    This chapter gives an overview of site administration in SharePoint 2013. It defines the context in which administrators' work, the roles they fill as administrators, and the functions they perform in each role. Further, the chapter defines the basic web site life cycle, and identifies the administrative and management tasks associated with particular stages of that life cycle.

    Key concepts:
    • Planning
    • SharePoint 2013 site administration tasks
    • Site life cycle

2. **Creating and Managing Sites and Sub sites**

    This chapter introduces and examines in detail the basic site framework used in SharePoint 2013. Site creation, management, and disposition are illustrated, with an overview of basic SharePoint 2013 site templates. Students are given a working knowledge of the different site templates, as well as the requirements for managing sites created from each template.

    Key concepts:
    • Site templates
    • Site life cycle management
    • Site settings
    • Site hierarchy

3. **Customizing Site Look and Navigation**

    This chapter explains the techniques available for changing elements of the site interface. SharePoint 2013 includes the capability to modify site characteristics such as the site title, site icon, the general site color scheme, and the menus surfaced for site navigation. Best practices in the deployment of site navigation settings are discussed, with a focus on providing a consistent and intuitive navigational experience for site users.

    Key concepts:
    • Configuring themes
    • Navigation Management
    • Managed metadata navigation

4. **Master Pages and Page Layouts**

Key concepts:
- Introduction to Design Manager
- Site versus System master page
- Inheriting master page settings
- Controlling and applying page layouts

5. **Managing Site Administrative Settings**

This chapter reviews the settings and galleries used in general site administration. The differences between Site Collection Administrative Settings and Site Administrative Settings are discussed. Students are shown how to manage such things as web feed or RSS, user alerts, regional settings, the term store, search and offline availability. The purpose of each gallery that comes with a new site is explained, and the means for managing gallery content described. The differences in administrative settings resulting from different site templates are compared and demonstrated. Students are given an introduction to site monitoring and understanding the metrics related to site usage.

Key concepts:
- Galleries
- Web feed
- Site alerts
- Term store management
- Site collection and site administration
- Site health
- Site health checks
- Site usage
- Monitoring reports
- Search

6. **Administering List, Library and App Settings**

This chapter explains the basic management of lists and libraries that come with SharePoint 2013. An overview of standard lists and libraries is given, along with a review of the list/library life cycle process. Students are shown essential skills for managing lists and libraries, including the creation of columns, the use of views, and the implementation of document management best practices. Students learn how to enable versioning, check-in/check-out, and approval on document libraries.

Key concepts:
- Standard lists, libraries and apps
- Collaboration best practices
- Views
- Metadata

7. Structure, Audit, and Recover Content

Key concepts:
- Managing the structure of content in the site
- Enabling auditing and running audit reports
- Managing the recycle bin and recovering content

8. Configuring SharePoint Workflows

This chapter provides an introduction to the out-of-the-box workflows in SharePoint, including Approvals, Collect Feedback, Three-State, Disposition Approval, and Web Analytics Workflows. Students are shown how to create workflows for lists, sites and content types, how to modify workflows, and check workflow status.

Key concepts:
- Site workflows
- List workflows
- Reusable workflows
- Workflow status
- Business process

9. Managing Metadata and Policies for Lists and Libraries

This chapter details key management settings for lists and document libraries. Students are shown how to navigate to and manage various features available in lists and document libraries such as column validation settings, ratings, metadata navigation settings, content types, and per location view settings. Students will also learn how to leverage content types to apply information management policies.

Key Concepts:
- Managing lists, libraries and apps
- Advanced configuration

10. Managing Security with Permissions

This chapter gives students the fundamental capabilities for securing various elements of a SharePoint 2013 site infrastructure. Students are taught skills related to information security and how to apply these skills in the SharePoint setting. Best practices for security management are highlighted and illustrated.

Key concepts:
- Security
- Security groups
- Security management
- Access control

11. Content Organizer

This chapter introduces the Content Organiser feature which allows documents to be automatically categorised and stored in specific locations within a site or across sites.

Key concepts:
- Enabling Content Organizer in a site
- Defining routing rules
- Configuring the drop-off library

12. Managing Social Networking

This chapter gives students an understanding of how to manage the social networking features in SharePoint 2013 at the site collection and subsite level.

Key concepts:
- Understanding social networking SharePoint
- Configuring Communities
- Configure Microblogging
- Configure Social web parts

13. Configuring Search

In this module students learn about the various search settings available at the Site Collection and Site level. These will be explained and reviewed in depth to provide an understanding of each of the settings so students are able to optimize the search within their organizations.

- Site Collection Search Orientated Tasks
- Search Result Sources
- Search Result Types
- Search Query Rules
- Search Schema
- Search Settings
- Search Templates
- Search Configuration Import (optional)
- Search Configuration Export (optional)
- Search engine optimisation settings
- Search and Offline Availability