



## Synergy Productivity Training Series

# SharePoint 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 web sites, plus the associated tool set for performing related tasks. SharePoint was created to empower organisations 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 organisation.

### Skills Gained

After completing the course students will:

- Understand the role of site administrators in the SharePoint 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 customise 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 as list administrators or site owners.

### Prerequisites

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



## 1. Site Administration in SharePoint

This chapter gives an overview of site administration in SharePoint. 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 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. Site creation, management, and disposition are illustrated, with an overview of basic SharePoint 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. Customising Site Look and Navigation

This chapter explains the techniques available for changing elements of the site interface. SharePoint 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. 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 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 Organiser

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 at the site collection and subsite level.



Key concepts:

- Understanding social networking in SharePoint
- Configure 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 organisations.

- 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