SharePoint 2013 End User – Level 1

This SharePoint 2013 Power User training class is designed for individuals who need to learn the fundamentals of managing SharePoint sites.

Détails

- Code : SP2013 EU1
- Durée : 2 jours (14 heures)

Public

Pré-requis
- Basic computer knowledge.

Objectifs
- Create custom workflows using SharePoint Designer 2013.
- Learn to use Content Approval settings and Workflow.
- Learn to use Term stores and managed Metadata.
- Learn to use the Document ID Service.
- Learn SharePoint Server Publishing Infrastructure.

Programme

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 items.
- 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.

Lessons
- Enabling Content Approval
- Content Approval Workflows

Lab : Content Approval
- Enabling and Using SharePoint Content Approval
- Enabling and Using SharePoint Approval Workflow
- After completing this module, students will be able to:
- Enable content approval.
- Set the visibility of items that have not been approved.
- Approve items.
- Enable out-of-box workflows.
- Assign out-of-box approval workflow for a list/library item.
- Approve and item using a task created by the out-of-box approval workflow.

Module 2: Creating Custom Workflows with SharePoint Designer 2013
- Workflows are a popular way to perform automated work in SharePoint.
- The pay versions of SharePoint Server, Standard and Enterprise, come 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 2013 or Visual Studio 2012.
- SharePoint Designer is a powerful and fairly easy to use tool for creating custom workflows and does not require any formal developer skills.
- Visual Studio, although extremely powerful in creating custom workflows, requires developer skills to use.
- The walk-throughs and exercises in this course will focus on using SharePoint Designer 2013 to create custom workflows.

Lessons
- Workflow Basics
- Custom List Workflows
- Workflow Actions
- Workflow Conditions
- Workflow Initiation Form
- Resusable Workflows

Lab : Creating Custom Workflows with SharePoint Designer 2013
- Creating Custom List Workflows
- Creating Resusable Workflows
- After completing this module, students will be able to:
- Understand workflow basics.
- Create a list workflow using SharePoint Designer 2013.
- Run a workflow.
- View a workflow's history.
- Add actions to a workflow.
- Add conditions to a workflow.
- Add parameters to a workflow initiation form.
- Create a reusable workflow.
- Associate a reusable workflow with a list/library.

Module 3: Working with Managed Metadata
- The Managed Metadata service in SharePoint Server 2013 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.

- The Managed Metadata service only comes with the pay versions of SharePoint Server, and it is not available with SharePoint Foundation 2013.
- Term Store terms are organized within a Term Set which is created within a Term Group forming a hierarchy nested within the Managed Metadata Service.
- The parent service defines Term Store Administrators that are responsible for creating the Term Groups.
- The Term Groups define the Group Managers and Contributors.

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

Lab : Working with Managed Metadata
- Creating a Term Store Group and Term Set
- Creating Managed Metadata Columns

After completing this module, students will be able to:
- Understand managed metadata service basics.
- Create Term Store groups.
- Create Term Store sets.
- Create Managed Metadata columns is a list or library.
- Under the basics of content type publishing.

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.
- Normal SharePoint lists expose data that is stored inside of a SQL content database that SharePoint creates and maintains.

Lessons
- Business Connectivity Service Basics
- Creating an External Content Type iwth SharePoint Designer
- Creating a List from an External Content Type

Lab : Business Connectivity Services
- Working with Exerntal Content Types and Lists

After completing this module, students will be able to:
- Understand the basics of Business Connectivity Services.
- Create an External Connection using SharePoint Designer.
- Create an External Content Type using SharePoint Designer.
- Define database operations using SharePoint Designer.
- Create a list using the External List template.
- Create an External List using SharePoint Designer.

Module 5: Information Management Policy
- In this lesson, you will learn the basics of information management policy.

Lessons
- Information Management Policy Basics
- Defining Information Policy for a Content Type
- Defining Information Policy for a List

Lab : Defining Information Policy for a List
- Create an information Management Policy for a List

After completing this module, students will be able to:
- Understand the basics of Information Management Policy.
- Configure an information Management Policy for a Content Type.
- Define Information Management Policy Stages.
- Configure an Information Management Policy for a list/library.

Module 6: Content Organizer
- Content organizer is a SharePoint feature that only comes with the pay versions of SharePoint.
- It 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.

Lessons
- Activating the Content Organizer Feature
- Configuring Content Organizer Settings
- Configuring content Organizer Rules
- Lab : Content Organizer
- Activating and Configuring the Content Organizer Feature

After completing this module, students will be able to:
- Activate the Content Organizer site feature.
- Modify the Content Organizer settings.
- Create the Content Organizer rules.

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.

Lessons

- Activating the Document ID Feature
- Configuring Document ID Settings
- Linking Documents Using Their Document ID

Lab : Document ID Service

- Activating and Configuring the Document ID Service

After completing this module, students will be able to:

- Understand what the Document ID feature does.
- Activate the Document ID feature in a Site Collection.
- Configure the Document ID feature settings.
- Force the Document ID feature timer jobs to run.
- Link to a document using the Document ID URL.

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.
- The Document Sets feature is only available with the pay versions of SharePoint Server 2013.
- 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.

Lessons

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

Lab : Document Sets

- Configuring Document Sets Feature

After completing this module, students will be able to:

- Understand the advantage of using Document Sets.
- How to activate the Document Set feature.
- Create content types that inherit from the Document Set type.
- Add custom columns to an inherited Document Set.
- Modify the Welcome Page of a Document Set.
- Add Document Sets to a library.

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 is only available on the pay versions of SharePoint is can be enabled by activating features at both the site collection and site level.

Lessons

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

Lab : SharePoint Server Publishing Infrastructure

- Activating Publishing Infrastructure
- Creating Publishing Pages

After completing this module, students will be able to:

- Activate the site collection's SharePoint Server Publishing Infrastructure feature.
- Activate the site's SharePoint Server Publishing Infrastructure feature.
- Understand how the SharePoint Publishing Infrastructure works.
- Create a page using publishing layouts.
- Change the layout of a page.

Module 10: Configuring and Consuming Site Search Results

- SharePoint 2013 comes out-of-the-box with search capabilities, even the free Foundation version.
- The main difference with SharePoint Foundation 2013 version of search is its limited in scalability, everything has to run on a single server.
- Other than the scalability the Search services is internally the same for all versions of SharePoint 2013.

Lessons

- Search SharePoint for Content
- SharePoint Search Center
- Lab : Configuring and Consuming Site Search Results
- Basic SharePoint Search
- Advanced Search

After completing this module, students will be able to:

- Perform a basic search in SharePoint.
- Add a Search Center.
- Configure the site's search box to use a Search Center.
- Crawl Content.

Modalités

- Type d'action :Acquisition des connaissances
- Moyens de la formation :Formation présentielle – 1 poste par stagiaire – 1 vidéo projecteur – Support de cours fourni à chaque stagiaire
- Modalités pédagogiques :Exposés – Cas pratiques – Synthèse
- Validation :Exercices de validation – Attestation de stages