Business Skills - SharePoint 2013 Site Owner and Power User Boot Camp

This 4-day SharePoint 2013 Boot Camp is the most comprehensive SharePoint User training course available. Users that have basic knowledge of navigating a SharePoint site will find this class the perfect class for learning and building on advanced SharePoint topics required by teams that want to get the full benefit of the powerful tools available in SharePoint 2013. Students also leave class as a certified SharePoint User. During this course students learn what SharePoint is, how companies are using SharePoint, the business value of SharePoint, and a full understanding of using a SharePoint Site to realize the full scope of SharePoint tools to improve how the business communicates. Students walk away knowing how to use the out-of-the-box (OOTB) Apps in SharePoint 2013, including Lists, Libraries and advanced features available for information classification and management. The detailed explanation and hands-on labs for Lists and Libraries teaches students how to build, navigate and work with data to store and collaborate on documents.

Skills Gained

- Learn What SharePoint is and how businesses are improving productivity and information management with SharePoint 2013
- Understand the basics of Planning, Governance, and Adoption
- Realize the value of SharePoint to your business and how it is tied to Corporate Vision
- Get a comprehensive introduction to the SharePoint 2013 interface as well as its new features
- Understand the SharePoint architecture and hierarchy and how to use these to build powerful SharePoint Team Sites
- Learn how Lists and Libraries are used to track business process data and how to build these to support management of business processes
- Fully understand Enterprise Content Management and how to use SharePoint to guarantee your corporate information is useable and findable
- Understand the social features for tracking data and making data more discoverable as well as how to drive team engagement with the new Communities feature
- Learn how to use the out-of-the-box (OOTB) Workflow system to automate business processes as well as how to use SharePoint Designer to start building custom workflows
- Derive business Insights from using the Business Intelligence tools

Who Can Benefit

The target audience for this class is users tasked with driving SharePoint from the day-to-day creation and management of information to driving user adoption and engagement. (This class is not for the Farm Administrator or SQL DBA roles).

- End User
- Site Owner
- Content Editor
- Information Manager
- Site Administrator
Prerequisites
Basic computer knowledge and skill is required for this class. The student should already be familiar with basic SharePoint navigation and should have a good introduction to the basics of SharePoint as this class is a deep-dive into more advanced SharePoint topics and management methodology. The perfect pre-requisite for this class is the Introduction to SharePoint 2013 for End Users.

Course Details

Introduction to SharePoint 2013
- What is “this” SharePoint everyone is talking about?
- Evolution of SharePoint – Where did it come from?
- Business Case for SharePoint
- SharePoint as a tool in support of your Enterprise Vision
- Driving SharePoint from the Top Down
- Using SharePoint to enable Team Collaboration and Drive Engagement
- Understanding and Defining SharePoint Roles
- The 5 pillars of SharePoint: Share/Organize/Discover/Build/Manage

Introduction to SharePoint Governance
- What is Governance?
- Considerations for building the Governance model
- Understanding what needs to be on the Checklist
- Assembling the Governance Team
- Asking the right questions
- Knowing what Principles and Policies need to be addressed
- Maintaining and supporting your SharePoint Governance

Deployment and Adoption
- SharePoint as an Organization-Wide Commitment
- SharePoint Roles
- People don’t like Change! – Helping teams realize the value of SharePoint
- Starting Small and Growing
- Best practices for SharePoint Rollout to drive User Adoption
- Tools to help you

What’s New in SharePoint 2013 for End Users, Site Owners, Site Collection Administrators

- Site Collection Administrator
- Project Manager
- Team Supervisor
- Librarian
- Any other users within the SharePoint ecosystem
and Content Managers to drive Team Collaboration and facilitate information management

- User Interface (UI)
- Social Features
- Communities
- Sharing info and offline availability
- Interacting with Lists and Libraries

SharePoint Versions and Hosting Options

- Foundation
- Standard
- Enterprise
- On Premise vs Cloud
- Offered Feature Comparison Chart

SharePoint Architecture for the Users

- Web Application
- Site Collection
- Site
  - Site Components

Navigating SharePoint Sites

- Tour of a Project Site
- Site Components
- Suite Bar
- Top Link Navigation
- Quick Launch
- Tabs and Ribbons
- Share, Follow, Sync, Edit, Focus on Content
- Settings (Site Actions)
- Site Contents
- Recycle Bin
- Site Content Area
- Understanding URL’s and how to use them to Navigate
- IE Favorites
- Newsfeed
- List and Library Examples

Working with Sites

- Definition of a Site – Why do we create new Sites?
- Site Components revisited
- Site Templates explained
LAB 1: Creating a Site Structure - Training Center Example

- Create a Site Collection Top Level Site
- Default Groups and Permissions
- Settings and Features
- Create a Child Site – SharePoint Training
- Simple site branding: Title, Logo, Composed Looks
- Navigation

SharePoint Lists


LAB 2: Working With and Creating Lists in the SharePoint Training Site

- “Training” Tasks
- “Training” Calendar
- “Instructor Availability” Calendar
- Custom “Classes” List

SharePoint Libraries

- What are Libraries?
- Using Libraries to manage document information lifecycle in the Enterprise
- Library Architecture
- Available Library Apps
- Creating Apps using Library templates
- Exploring the Library toolbars
- Working with documents
- Document control using Check In/Check Out
- Using basic reporting functions: sort and filter
- Using Version Control
- Advanced Library Topics
- Working with Views
- Class Activity: Architecting a “Client Records” Library

LAB 3: Working with and Create Libraries in the SharePoint Training Site

- Create a Document Library
- Upload documents and create new documents
- Enable Version Control
- Work with documents with Version Control
Access Control – Permissions Management
Overview of Permissions and Security Groups Users Permission Levels Roles-based Management Where Permissions are set Inheritance Using "Sharing" to share information Access Requests Best Practices

LAB 4: Working with permissions and Sharing information
- Creating a Group
- Adding Users to a Group
- Assigning Permission Levels
- Sharing a Site and a Library
- Working with Permission Levels

Enterprise Content Management
- Importance of ECM
- Content Types
- Managed Metadata
- Document Sets

LAB 5: Working with Content Types
- Creating Site Columns
- Creating Content Types
- Using Managed Metadata
- Creating Document Sets

SharePoint 2013 and Office Integration
- Connecting and Syncing Lists and Libraries to Outlook
- Project Pro Integration
- Exporting data to Excel
- Site Mailboxes

LAB 6: Connecting Lists and Libraries to Outlook
- Syncing the Task List
- Connecting a Calendar
- Connecting Contacts
- Exporting a List to Excel
- Creating a Site Mailbox

Business Process Automation using Workflow
- OOTB Workflow
- Workflow Settings
LAB 7: Using Workflow
- Creating an Approval Workflow
- Creating a Three-State Workflow
- Creating a Custom Workflow to manage documents

Focus on Collaboration Tools to drive engagement
- Surveys
- Wiki
- Blog
- Newsfeed
- About Me
- Communities

LAB 8: Using the Collaboration Tools
- Creating a Survey
- Creating a Wiki for Procedures Manual
- Creating a Blog
- Creating your “Profile” / About Me
- Using the Newsfeed
- Following Colleagues, documents and sites
- Creating a SharePoint User Group Community

Designing a SharePoint site to drive collaboration
- Pages: Page Types, Choose the right page type, Creating pages
- Web Parts: What are web parts, Using the common web parts, Web part properties
- Page Design: Creating pages, Page layout, Placing components on your page

LAB 9: Designing your Team Site
- Planning your page
- Creating a new page
- Place components and web parts on the page
- Moving items around on a page
- Best Practices

Introduction to Business Intelligence
- What is Business Intelligence?
- Excel Services
- Visio Services
LAB 10: Using basic BI Features

- Work with Excel Services to expose Excel KPI in a Site
- Work with Visio Services to expose Visio Diagram in a Site

Practical Exercise

- Designing a Site and its artifacts from business requirements detailing a real-world problem