


Course 55198A:

Microsoft SharePoint Server Content Management for SharePoint 2013 and 2016

 Course details

Course Outline

Module 1: SharePoint Content Management

This module supplies an overview of SharePoint content management features and a review of SharePoint security.

Lessons

- SharePoint's Content Management Features
- SharePoint Security
- Sharing SharePoint Content
- SharePoint Sync

Lab : SharePoint Security and Sync Configuration

- Securing a Library
- Working with Users and Groups
- Managing Share and Sync

After completing this module, students will be able to:

- Describe the SharePoint Content Management Features.
- Configure List and Library Security.
- Understand the risks of “Share” and “Sync”.

Module 2: Library Configuration

This module explains how to create and configure SharePoint libraries. Here, we will review and expand on topics covered in typical Site Owner training.

Lessons

- Versioning
- Content Approval
- Check Out/In
- Ratings and Likes
- Column and Item Validation Settings
- RSS and Incoming Email

Lab : Library Configuration

- Create and Configure a “Products” Library
- Exploring Library Features
- Uploading Content

After completing this module, students will be able to:

- Create and configure libraries.

Module 3: Metadata and Taxonomy

In this module we will explore the concepts of metadata and a formal taxonomy. We will explore Managed Metadata Services from the farm level and the site level.

Lessons

- Definitions!
- Who Creates and Manages Your Taxonomy?
- Using Metadata
- The Managed Metadata Service
- Enterprise Metadata and Keywords Settings

Lab : Metadata and Taxonomy

- Working with Ad Hoc Columns
- Working with Choice, Lookup and Metadata Columns
- Creating and Using Term Sets
- Configuring Library Metadata Options

After completing this module, students will be able to:

- Describe SharePoint Metadata and Taxonomy features.
- Create and Consume Managed Metadata Term Sets.

Module 4: Site Columns and Content Types

This module explains how to formalize, standardize and automate the collection of metadata by using Site Columns and Content Types.

Lessons

- Working with Site Columns and Content Types
- Site Columns
- Content Types
- The Content Type Hub

Lab : Site Columns and Content Types

- Creating and using Site Columns
- Creating and using Content Types
- Working with the Content Type Hub

After completing this module, students will be able to:

- Define, and know when to use, Site Columns and Content Types.
- Manage content using Site Columns and Content Types.
- Centrally manage Content Types using a Content Type Hub.

Module 5: Auditing and Retention Policies

This module explores the Information Management Policies features, including activity auditing and document retention policies.

Lessons

- Information Management Policy Settings
- Creating a Site Collection Policy template
- Configuring Document Retention
- Configuring Document Auditing
- Creating Policies for a List or Library
- List and Document Activity Reports

Lab : Auditing and Retention Policies

- Configuring Information Management Policy Settings for a Library
- Configuring Information Management Policy Settings for a Content Type
- Using List and Document Activity Reports

After completing this module, students will be able to:

- Describe SharePoint's features for auditing and retention policies.
- Configure Information Management Policy Settings for a Library or Content Type.
- Use List and Document Activity Reports.

Module 6: Organizing Content

This module explains how organize and manage large libraries.

Lessons

- Folders
- Views
- Document Sets
- The Content Organizer

Lab : Organizing Content

- Working with Folders and Views
- Creating a Custom Document Set
- Configuring the Content Organizer to move documents

After completing this module, students will be able to:

- Know when to use folders vs. views.
- Create custom Document Sets.
- Work with the Content Organizer to automatically move documents.

Module 7: Library Automation

This module explains how to use SharePoint's automation tools to manage documents. These include Alerts, Retention Policies and Workflows. This module will provide an overview of workflow creation using SharePoint Designer.

Lessons

- SharePoint's Automation Tools: Alerts, Policies, Workflows and Flow
- The Out of the Box Workflows
- SharePoint Designer Workflows

Lab : Library Automation

- Using the Out of the Box Approval Workflow
- Creating a SharePoint Designer Workflow

After completing this module, students will be able to:

- Describe the SharePoint Automation features.
- Configure the out of the box features and workflows.
- Get started with SharePoint Designer workflows.

Module 8: Records Management

This module explores records and SharePoint's record management features. Both the Records Center and In Place Records Management are covered.

Lessons

- Records
- In Place Records Management
- The Records Center

Lab : Records Management

- Configuring In Place Records Management.
- Creating a Records Center site.
- Managing Records.

After completing this module, students will be able to:

- Identify and plan for records.
- Enable and use In Place Records Management.
- Create and configure a Records Center site.

Module 9: Search Optimization for Libraries

This module explains how to configure a better search experience for your library users by modifying the search schema to take advantage of your metadata. (For complete coverage of Search Administration see course: “55122AC Microsoft SharePoint 2013 Search Administration”.)

Lessons

- Tips for Searching Library Content
- From Site Column to Managed Property
- The Search Schema
- Improving the Search Experience

Lab : Search Optimization for Libraries

- Searching Libraries
- Creating a Search Managed Property
- Improving Title and Author Searches

After completing this module, students will be able to:

- Describe the relationship between Site Columns and Search Managed Properties.
 - Create new Managed Properties from Site Columns.
 - Improve user search results by “tweaking” the search schema.
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