MOC 55198 A: Microsoft SharePoint Server Content Management for SharePoint 2013 and 2016

Course Summary

Description

This two-day instructor-led is intended for SharePoint Site Owners and Content Owners. In this course, students learn how to configure and use SharePoint’s library content management features.

Objectives

At the end of this course, students will be able to:

- Plan, organize and manage SharePoint content.
- Configure and use SharePoint library features such as versioning, content approval and validation.
- Create and manage metadata.
- Create, distribute and use Site Columns and Content Types.
- Configure and use Auditing and Retention.
- Configure and use library organization features such as Folders, View, Document Sets and the Content Organizer.
- Choose and configure automation features such as workflows and alerts.
- Plan for, configure and use SharePoint’s Record Management features.
- Improve the end user search experience for libraries.

Topics

- SharePoint Content Management
- Library Configuration
- Metadata and Taxonomy
- Site Columns and Content Types
- Auditing and Retention Policies
- Organizing Content
- Library Automation
- Records Management
- Search Optimization for Libraries

Audience

This course is designed for:

- SharePoint end users
- SharePoint Site Owners and Power
- SharePoint administrators and developers
- SharePoint Governance Team members

Prerequisites

Before taking this course, students should have:

- Attended a SharePoint Site Owners class or have strong SharePoint Site Owner / Site Collection Administrator experience.
- Knowledge of their business requirements for content, records and governance.

Duration

Two days

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Course Outline

I. SharePoint Content Management
This module supplies an overview of SharePoint content management features and a review of SharePoint security.
   A. SharePoint’s Content Management Features
   B. SharePoint Security
   C. Sharing SharePoint Content
   D. SharePoint Sync

Lab: SharePoint Security and Sync Configuration
- Securing a Library
- Working with Users and Groups
- Managing Share and Sync

II. 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.
   A. Versioning
   B. Content Approval
   C. Check Out/In
   D. Ratings and Likes
   E. Column and Item Validation Settings
   F. RSS and Incoming Email

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

III. 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.
   A. Definitions!
   B. Who Creates and Manages Your Taxonomy?
   C. Using Metadata
   D. The Managed Metadata Service
   E. 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

IV. 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.
   A. Working with Site Columns and Content Types
   B. Site Columns
   C. Content Types
   D. 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

V. Auditing and Retention Policies
This module explores the Information Management Policies features, including activity auditing and document retention policies.
   A. Information Management Policy Settings
   B. Creating a Site Collection Policy template
   C. Configuring Document Retention
   D. Configuring Document Auditing
   E. Creating Policies for a List or Library
   F. 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
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Course Outline (cont’d)

VI. Organizing Content
This module explains how to organize and manage large libraries.
   A. Folders
   B. Views
   C. Document Sets
   D. The Content Organizer

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

VII. 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.
   A. SharePoint’s Automation Tools: Alerts, Policies, Workflows and Flow
   B. The Out of the Box Workflows
   C. SharePoint Designer Workflows

Lab: Library Automation
   - Using the Out of the Box Approval Workflow
   - Creating a SharePoint Designer Workflow

VIII. Records Management
This module explores records and SharePoint’s record management features. Both the Records Center and In Place Records Management are covered.
   A. Records
   B. In Place Records Management
   C. The Records Center

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

IX. 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”.)
   A. Tips for Searching Library Content
   B. From Site Column to Managed Property
   C. The Search Schema
   D. Improving the Search Experience

Lab: Search Optimization for Libraries
   - Searching Libraries
   - Creating a Search Managed Property
   - Improving Title and Author Searches

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