

LEARNING OUTCOMES

By the end of this course participants will be able to:

- * Create and navigate Excel files
- * understand the basics of SharePoint including SharePoint sites and their components
- * navigate SharePoint sites
- * work with documents, lists and libraries
- * perform searches in SharePoint
- * use the social networking features
- * work with OneDrive For Business
- * create, modify and delete sites in your personal site
- * prepare a training site
- * create and work with files, list items, calendars and events
- * create, modify and delete views for lists and libraries
- * create and work with wiki pages and web part pages
- * understand workflows and be able to create and work with three-state workflows
- * create custom list workflows in SharePoint Designer
- * create and work with custom content types and document set content types
- * create and modify team sites and create a custom template from a SharePoint site
- * create a project and community site
- * work with Search in your site
- * manage the security for a site and its content

PREREQUISITES

It is recommended that participants have basic experience with the underlying operating system, i.e. an ability to navigate the environment using a mouse and keyboard plus an understanding of computer file storage.

CUSTOMISATION

In addition to our standard courseware, we can adapt course content and flow to your specifications.

COURSE OUTLINE

GETTING TO KNOW SHAREPOINT

- * What Is SharePoint
- * Course User Accounts
- * Starting SharePoint
- * Core Elements of a SharePoint Site
- * SharePoint and Team Sites
- * Lists, Libraries, Views
- * SharePoint Apps
- * Signing Out of SharePoint

NAVIGATING A SHAREPOINT SITE

- * Navigation Elements in a SharePoint Site
- * Using the Navigation Bars
- * Using Links in the Page
- * Displaying All Content in Your Site
- * Using the Ribbon
- * Navigating to My Site Features
- * Navigating to a SharePoint Site From My Site

DOCUMENTS LISTS AND LIBRARIES

- * Selecting Files and Items
- * Reading a Document
- * Downloading a Copy of a Document
- * Emailing a Link to a Library
- * Emailing a Link to a Document
- * Exporting Lists to Excel
- * Viewing Version History
- * Viewing Properties
- * Sorting and Filtering Lists and Libraries
- * Switching Views in Lists and Libraries
- * Switching Views in Calendars
- * Tagging a Document or List Item
- * Tagging an External Site
- * Adding Notes to a Document or List Item
- * Managing Tags and Notes
- * Creating an Alert on a Document or List Item
- * Creating an Alert on a Library or List
- * Managing Your Alerts

SEARCHING IN SHAREPOINT

- * Searching in a Library or List
- * The Search Centre
- * Searching Anywhere in SharePoint
- * Refining a Search
- * Performing an Advanced Search
- * Searching for People

SOCIAL NETWORKING

- * Common Social Computing Terms
- * Understanding My Sites
- * Understanding Your Profile Page
- * Editing Your Profile Page
- * Checking the Language and Region Settings
- * Understanding Your Newsfeed
- * Viewing Your Newsfeed

- * Following People, Documents and Sites
- * Viewing Sites That You Are Following
- * Posting to Your Newsfeed
- * Mentioning People in Posts
- * Using Tags in Posts
- * Replying to and Liking Posts
- * Changing Newsfeed Settings
- * Managing Your Tasks
- * Using Your Blog
- * Managing Your Blog

ONEDRIVE FOR BUSINESS

- * Understanding OneDrive for Business
- * Accessing OneDrive for Business
- * Uploading Files
- * Creating New Files and New Folders
- * Editing Files
- * Sharing Files
- * Synchronising Your Library
- * Deleting Files and Folders

WORKING WITH PERSONAL SITES

- * Creating a Subsite
- * Changing the Appearance
- * Adding Apps
- * Adding a Page
- * Changing the Navigation
- * Deleting a Subsite

PREPARING YOUR TRAINING SITE

- * Creating a Training Subsite
- * Preparing a Document Library
- * Adding a Tasks List

WORKING WITH FILES AND ITEMS

- * Uploading a Single File
- * Uploading Multiple Files
- * Uploading Files Using an Explorer Folder
- * Creating a New Document in a Library
- * Creating a New Folder in a Library
- * Creating a New Item in a List
- * Creating a New List Item Using Quick Edit
- * Editing a Document
- * Editing the Properties of a File
- * Editing the Properties of a List Item
- * Adding Tasks to the Timeline
- * Deleting a File or List Item
- * Restoring a Deleted File or List item
- * Understanding Versioning and Check Out
- * Using Check in and Check Out
- * Publishing a File or List Item
- * Restoring an Earlier Version
- * Checking Permissions on Files
- * Understanding Document Co-authoring
- * Synchronising a Library or Folder
- * Approving or Rejecting a File or List Item
- * Connecting a Content Type to a Library
- * Adding Columns to a Content Type

CREATING LISTS AND LIBRARIES

- * Understanding Your Apps Page
- * Adding a Document Library
- * Adding a List
- * Importing a List From Excel
- * Publishing an Excel Table as a List
- * Updating Data in a Connected Excel Table
- * Adding a Custom List
- * Understanding Column Types
- * Adding a Column to a List or Library
- * Adding a Column in Datasheet View
- * Adding a Column With Custom Validation
- * The List and Library Settings Page
- * Modifying a Column in a List or Library
- * Deleting a Column From a List or Library
- * Reordering Columns in a List or Library
- * Renaming a List or Library
- * Changing the Versioning Settings
- * Creating Multiple Items From Excel
- * Editing the Document Template for a Library
- * Adding Content Types to a Library
- * Deleting a List or Library

WORKING WITH CALENDARS

- * Adding a Calendar, and Event
- * Changing an Event
- * Connecting a Calendar to Outlook
- * Working With Connected Calendars in Outlook
- * Disconnecting a SharePoint Calendar
- * Deleting an Event
- * Using Calendars Overlay

CREATING VIEWS

- * Creating a New View From an Existing View
- * Creating a Custom View
- * Understanding the Create View Page
- * Selecting the Columns
- * Modifying a View
- * Specifying Sort Criteria, Filter Criteria, Grouping Criteria and Other Criteria
- * Creating a Dynamic View
- * Creating a Calendar List View
- * Deleting a View

AUTHORING WIKI PAGES

- * Understanding Page Types
- * Placing a Wiki Page in Edit Mode
- * Inserting and Formatting Text
- * Inserting Tables, Pictures and Links
- * Inserting Web Parts Into a Text Editor Control
- * Creating a New Wiki Page
- * Linking to an Existing Wiki Page
- * Linking to a New Wiki Page
- * Renaming and deleting a Wiki Page

AUTHORING WEB PART PAGES

- * Understanding App Parts and Web Parts
- * Creating a Web Part Page
- * Placing a Page in Edit Mode
- * Adding an App Part
- * Adding a Content Editor Web Part
- * Fix for Enabling Content Editor Web Part
- * Adding an Image Viewer Web Part
- * Understanding the Tool Pane
- * Modifying an App Part
- * Linking to an Image in an Image
- * Working with Web Parts
- * Editing the Properties of a Web Part Page
- * Comparing Page Versions

WORKING WITH WORKFLOWS

- * What Is a Workflow
- * Understanding Three-State Workflows
- * Understanding the Add a Workflow Page
- * Adding a Three-State Workflow
- * The Customise the Three-State Workflow Page
- * Customising the Workflow Settings
- * Initiating a Workflow
- * Completing the First Step in a Workflow
- * Finalising and Tracking the Workflow

CUSTOM WORKFLOWS

- * Downloading SharePoint Designer
- * Planning the Workflow
- * Creating a List for a Custom Workflow
- * Creating a Custom Workflow
- * Understanding the Workflow Settings Page
- * Setting the Workflow Options
- * Understanding Workflow Components
- * Inserting Stages and Steps
- * Inserting a Send an Email Action
- * Assignment Adding Extra Send an Email Actions
- * Inserting a Wait for Field Change Action
- * Inserting a Transition Go to a Stage Action
- * Inserting a Condition
- * Saving and Publishing a Workflow
- * Testing a Workflow
- * Opening an Existing Workflow

DOCUMENT MANAGEMENT

- * Understanding Site Columns
- * Understanding and creating Content Types
- * Changing the Template for a Content Type
- * Understanding Document Sets

- * Creating a Document Set Content Type
- * Configuring and using a Document Set Content Type

CREATING TEAM SITES

- * A Reminder About Sites and Site Collections
- * Understanding the New SharePoint Site Page
- * Creating a Team Site
- * Branding Your Site
- * Change the Look Options
- * Changing the Look of a Site
- * Adding Navigation Links With Drag and Drop
- * Adding Links to a Navigation Bar
- * Reordering and Deleting Links
- * Saving a Site as a Template
- * Deleting a Custom Template

OTHER COLLABORATION SITES

- * Understanding Project Management
- * Creating a Project Site
- * SharePoint Community Sites
- * Creating a Community Site
- * Working With a Community Site

WORKING WITH SEARCH

- * Understanding How Search Works
- * Understanding Search Verticals
- * Checking for Default Search Verticals
- * Displaying the Default Search Results Pages
- * Adding Default Search Verticals to a Site
- * Understanding Custom Search Verticals
- * Creating a New Result Source
- * Creating a New Search Results Page
- * Editing the Search Results Web Part
- * Adding a Custom Search Vertical
- * Understanding Query Rules
- * Creating a Query Rule
- * Testing a Query Rule

MANAGING SECURITY

- * Understanding Permissions
- * Understanding Inheritance
- * Breaking Permissions Inheritance
- * Viewing Permissions for Groups
- * Viewing Permissions for Users
- * Adding Users to a Group
- * Removing Users From a Group
- * Creating and modifying a Custom Group
- * Deleting a Group
- * Viewing Permissions on Libraries and Lists
- * Granting Unique Permissions to a Library or List
- * Restoring Permissions Inheritance
- * Creating Customised Permission Levels