



Microsoft SharePoint 2013 **For SharePoint Readers, Authors and Site Managers**

Overview:

The skills acquired in this course enable users with **Read**, **Edit** and **Full Control** permissions to be able to effectively use **SharePoint**.

Learning Outcomes:

At the completion of this course you should be able to:

- 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 and list items
- create lists and libraries
- work with calendars and events
- create modify and delete views for lists and libraries
- create and work with wiki pages
- create and work with 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:

Microsoft SharePoint 2013 – For SharePoint Readers, Authors and Site Managers assumes little or no knowledge of **SharePoint 2013**.

Duration:

2 Days

Courseware:

High quality learning materials are available for purchase by participants.

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Microsoft SharePoint 2013

For SharePoint Readers, Authors and Site Managers

Getting to Know SharePoint

- What Is SharePoint
- Course User Accounts
- Starting SharePoint
- Core Elements of a SharePoint Site
- SharePoint Sites
- 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
- Following 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
- Creating 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

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- 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

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
- Adding an Event
- Adding a Recurring Event
- Changing an Event
- Connecting a Calendar to Outlook
- Working With Connected Calendars in Outlook
- Disconnecting a SharePoint Calendar
- Deleting an Event
- Setting Up for Calendars Overlay
- 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
- Specifying Filter Criteria
- Specifying Grouping Criteria
- Specifying 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
- Inserting Pictures
- Inserting 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 a Wiki Page
- Deleting a 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 Viewer Web Part
- Moving Web Parts
- Reusing Web Parts
- Deleting a Web Part
- 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 the Workflow
- Tracking a 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
- Inserting 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

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- Inserting a Condition
- Saving and Publishing a Workflow
- Testing a Workflow
- Opening an Existing Workflow

Document Management

- Understanding Site Columns
- Understanding Content Types
- Creating a Content Type
- Adding Columns to a Content Type
- Connecting a Content Type to a Library
- Using a Custom Content Type
- Changing the Template for a Content Type
- Understanding Document Sets
- Creating a Document Set Content Type
- Configuring a Document Set Content Type
- 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 a Custom Group
- Modifying a 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

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