



For SharePoint Readers, Authors and Site Managers

InFocus Courseware

Product Code: INF1432 ISBN: 978-1-925121-46-9

General Description 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

This publication assumes little or no knowledge of SharePoint 2013.

Topic Sheets

271 topics

Methodology

The InFocus series of publications have been written with one topic per page. Topic sheets either contain relevant reference information, or detailed step-by-step instructions designed on a real-world case study scenario. Publications can be used for instructor-led training, self-paced learning, or a combination of the two.

FormatsAvailable

A4 Black and White, A5 Black and White (quantity order only), A5 Full Colour (quantity order only), Electronic Licence

Companion Products There are a number of complementary titles in the same series as this publication. Information about other relevant publications can be found on our website at **www.watsoniapublishing.com**.

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AUSTRALIAN MADE & OWNED

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Contents

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

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 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** Using Check in and Check Out Publishing a File or List Item Restoring an Earlier Version Checking Permissions on Files Understanding Document Coauthoring Synchronising a Library or Folder Approving or Rejecting a File or List

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 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

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Reordering Columns in a List or 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

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 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 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 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 Using a Custom Content Type Changing the Template for a Content **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 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



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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**



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