

COURSE 55293A: SHAREPOINT END USER

Duration: 3 Days

Delivery Method: Instructor-led Classroom

ABOUT THIS COURSE:

This SharePoint End User class is for end users and site owners/managers new to working in a SharePoint environment. The course teaches SharePoint basics such as working with lists and libraries, basic page customisation, working with forms and managing site permissions and users.

AUDIENCE PROFILE:

This course is intended for students who want to learn SharePoint.

COURSE OUTLINE:

Here is the complete course outline.

Module 1: SharePoint 2019 Introduction

SharePoint is a collaboration tool at its heart. Its primary goal is to make it easy for users to find and share information, and there are many features built into SharePoint to facilitate this. SharePoint's library system feature can provide a superior alternative to the traditional file server. SharePoint lists can be an easy-to-design and easy-to-use alternative to sharing spreadsheet files or more formal database tables. Both lists and libraries can be customized and extended to provide enhanced appearances and functionality, such as calendars and blogs, to name a couple. All of this collaboration can be done through a browser interface and in some cases through integration with Microsoft Office applications.

<p>LESSONS</p> <p>SharePoint Versions</p> <p>Team Site Layout and Navigation</p> <p>Layout</p> <p>Navigation</p>	<p>LAB : Exercise</p> <p>Team Site Navigation</p>
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Module 2: SharePoint List Basics

Lists are a fundamental building block in SharePoint that provides a way for users to store and view data. SharePoint comes "out of the box" with many predefined list templates that are easy to use. Lists can be further customized by adding columns to store just about any type of information. Additionally, list columns can be validated as well as linked between other lists. Lists are a very flexible and powerful tool in SharePoint.

LESSONS

Creating Apps Using List Templates

Creating Lists

Creating Lists Using List Templates

List Columns

Creating List Columns

Column Validation

Validating a List Column

LAB : Exercises

Working with Team Site Lists

Create Custom Lists and Columns

Module 3: Library Basics

SharePoint Libraries share the same characteristics as SharePoint lists such as columns, views, and validation to name a few. What distinguishes SharePoint libraries is that each item in a library has a underlying document. So in addition to the data stored in library columns, the document stores its own data based on the type of document. Because of the extra data that can be stored in columns that can be used to filter and search by and features such as versioning, libraries are considered a great replacement for the more traditional file server system. Libraries are, like lists, a fundamental building block in a SharePoint site.

LESSONS	LAB : Exercises
Library Templates	Working with Team Site Libraries
Creating Libraries	Creating Libraries
Creating a Document Library and Adding Columns	Document Versioning
Creating an Asset Library	
Managing Documents and Versioning	
Checking Out Documents	
Deleting and Restoring Documents	
Versioning	

Module 4: Working with Lists and Library Views

Views provide a flexible system to display SharePoint list and library data in an easy-to-read and easy-to-use manner. Every SharePoint list and library can have multiple views created and configured, and some list and library templates come with special views preconfigured. Views can be defined for personal use or shared use.

LESSONS	LAB : Exercises
Default Views	Working with Views
Explore Default Views	Creating Public and Personal Views
Custom Views	
How to Create a Custom View	

Module 5: Working with Sites

All SharePoint content is accessed through a site. A SharePoint site is the container for lists and libraries and provides a starting point for basic administration. The content, lists, libraries, and basic look and feel of a site is initially determined by the Site Template used to create the site.

LESSONS

- Site Templates
- Creating Sites
- Creating a Team Site
- Site Navigation
- Managing Site Navigation

LAB : Exercises

- Creating Team Sites
- Creating a Meeting Workspace
- Creating a Blog Site

Module 6: Page Content

SharePoint offers a couple of ways to add content to the pages in a site. The latest technique and the one implemented by the Team Site template is through site style pages. Another method that has been part of SharePoint in past is the use of Wiki and Web Part pages. The Wiki and Web Part techniques are similar in the output that can be created, and both share the ability to add Web Parts (an instance of an app with a view) to them.

LESSONS

- Wiki Library Page
- Editing the Team Site Home Page
- Web Part Pages
- Creating a Web Part Page
- Working with Web Parts
- Adding Web Parts to Pages

LAB : Exercises

- Working with Wiki Pages
- Working with Web Part Pages and Web Parts

Module 7: Forms Library

A SharePoint Forms library is a special library designed to store Microsoft InfoPath form documents. Microsoft InfoPath comes with a designer tool for graphically creating forms with a wide assortment of fields and controls. The InfoPath Designer can then be used to publish the forms you design to SharePoint rendering them as web page templates for Forms libraries. At the time of this writing Microsoft had stated that InfoPath would be retired. For SharePoint 2019 they left support for the tool in but there is not a 2019 version of the client tools. This means you can still use it in SharePoint 2019 but to create custom forms you use the InfoPath 2013 Designer tool. It is possible that future version of SharePoint will not support InfoPath forms at all. For this reason coverage of this chapter is optional for this course.

LESSONS

Creating a Forms Library

Creating InfoPath Forms

Create a Form with Microsoft InfoPath Designer

Publishing InfoPath Forms to SharePoint

Publish Custom InfoPath Form

LAB : Exercises

Creating and Publishing InfoPath Forms

Module 8: Site Columns and Content Types

One method of customizing SharePoint, in a way that can be reused throughout the site or site collection or even the whole farm, is to create Site Columns and Content Types. Site columns are the simplest element; they are essentially the same as list and library columns except that you create them at the site level and then they can be used throughout that site and any child site. Content Types are a combination of Site Columns as well as additional settings and information such as document templates and workflows. Content Types, once created, can then be linked to lists and libraries.

LESSONS	LAB : Exercises
Site Column Gallery	Creating and Working with Content Types
Explore the Site Column Gallery	Adding a Content Type to a Library
Creating Site Columns	
Create a Custom Site Column	
Add a Site Column to a List	
Site Content Type Gallery	
Explore the Site Content Types Gallery	
Creating Content Types	
How to Create and Use Content Types	

Module 9: Office Integration

One of the nice features of SharePoint is its ability to integrate with Microsoft Office applications. Just about every Office application offers some level of integration with SharePoint whether it be simple, such as using an Excel spreadsheet to create a new list, or more full featured, such as Outlook integration. Some integration features enhance what is available online through a browser, while others allow access to SharePoint content offline such as a mobile computer environment. This lesson will use a series of walk-throughs and exercises to show how each Office application can integrate with SharePoint. Note that this chapter explores integration with Office locally installed on the machine connecting to SharePoint. Office Online Server is a browser-based version of Office that allows you to create and modify Office documents. With SharePoint 2019, Office Online Server can be integrated and is considered an essential piece for many SharePoint installations. That being said, since it is a separate product from SharePoint it is not covered as part of this course.

LESSONS

Excel Integration

Import Excel Spreadsheet to List

Export List Data to Excel

Outlook Integration

Create an Alert

Suscribe to a List's RSS Feed

Connect to Outlook

Access Integration

Open a list with Access

Module 10: Managing SharePoint Site Permissions

Permissions on a SharePoint site are assigned when a site is created. The default is that permissions assigned to the root of a site collection are inherited by child sites. At any time, permissions inheritance can be turned off at a site, list, library, or even at the item level in a list or library. The permissions themselves can be assigned to either SharePoint groups, individual users, or groups created outside of SharePoint such as Windows groups.

<p>LESSONS</p> <p>SharePoint Groups</p> <p>Assigning Permissions</p> <p>Permission Levels</p> <p>Permission Inheritance</p>	<p>LAB : Exercises</p> <p>Working with SharePoint Permissions</p>
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Module 11: Participating in User Communities

SharePoint offers users a place for social collaboration in the form of personal sites. The experience and functionality is very similar to popular social media sites such as Facebook and LinkedIn. The main difference being that it is controlled by the SharePoint Farm and exposure is typically limited to internal networks.

<p>LESSONS</p> <p>Configure User Profiles and My Sites</p> <p>Newsfeeds</p> <p>People Newsfeeds</p> <p>Document Newsfeed</p> <p>Sites Newsfeed</p> <p>Tags Newsfeed</p> <p>Managing Personal Sites</p>	<p>LAB : Exercises</p> <p>Managing and Viewing Personal Information and Content</p>
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