

## SharePoint End User - 2 day



### Overview

Learn the essential skills of using Microsoft SharePoint. By the end of this course, users will be able to collaborate with other users through their SharePoint portal, including using document management, lists, discussion boards and surveys.

### Prerequisites

This course assumes that you have gained a basic understanding of Windows and Office applications. This includes an ability to work with multiple windows and navigate the desktop, as well as having an understanding of computer file storage (i.e. drives, files and folders). Familiarity with 365 is beneficial but not essential.

### Objectives

After completing this course, students will be able to:

- Understand the basics of SharePoint Online including SharePoint sites and their components
- Navigate SharePoint sites
- Perform searches in SharePoint Online
- Use the social networking features
- Work with OneDrive For Business
- 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 custom content types and document set content types
- Create and modify team sites
- Manage the security for a site and its content
- Understand how to work with existing SharePoint libraries
- Modify and customise lists and libraries
- Customise and work with workflows
- Understand site templates and how to work with them
- Install and use the SharePoint mobile app

### Exercises

This course is instructor led, involving the utilisation of examples and exercises in a workshop environment.

### Topics

#### Getting to Know SharePoint Online

- What Is SharePoint
- SharePoint Sites
- Team Sites
- Core Elements of a SharePoint Site
- SharePoint Apps
- Accessing SharePoint Online
- Signing Out of SharePoint

#### Navigating a SharePoint Site

- Navigation Elements in a SharePoint Site
- Navigating a Site Using the Quick Launch
- Customising the Quick Launch
- Displaying All Content in Your Site
- Navigating to Your Delve Profile
- Following a Site

#### Getting Help

- Using Help
- Searching in SharePoint
- Searching in a Library or List
- Using Google to Get Help

#### Social Networking

- Understanding Delve
- Accessing Delve
- Editing Your Profile Page
- Checking the Language and Region Settings
- Working With Boards
- Working With Favourites
- Using Your Blog
- The Delve Mobile App

**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 Libraries**

- Understanding Document Co-authoring
- Emailing a Link to a File
- Synchronising a Library or Folder
- Viewing Properties
- Editing the Properties of a File
- Understanding Versioning and Check Out
- Using Check in and Check Out
- Viewing Version History
- Approving or Rejecting a File or List Item
- Restoring an Earlier Version
- Checking Permissions on Files
- Sorting and Filtering Libraries
- Creating an Alert on a Document
- Creating an Alert on a Library
- Managing Your Alerts

**Working With Lists**

- Understanding Lists
- Adding a List
- Adding Items to a List
- Adding Columns
- Creating a List From a List App
- Creating a New Item in a List
- Creating a New List Item Using Quick Edit
- Editing the Properties of a List Item
- Deleting a File or List Item
- Restoring a Deleted List item

**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
- Creating a Dynamic View
- Creating a Calendar List View
- Deleting a View

**Working With Pages**

- Understanding Page Types
- Placing the Home Page in Edit Mode
- Modifying the Home Page Layout
- Modifying the Home Page Web Parts
- Creating a New Wiki Page
- Placing a Page in Edit Mode
- Inserting and Formatting Text
- Inserting Tables
- Inserting Pictures
- Inserting Links
- Inserting Web Parts Into a Text Editor Control
- Linking to an Existing Wiki Page
- Linking to a New Wiki Page
- Renaming a Wiki Page
- Deleting a Page

**Content Types**

- Understanding Site Columns
- Understanding Content Types
- Creating a Content Type
- Adding Columns to a Content Type
- Adding 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
- Removing a Content Type From a Library

**Creating Team Sites**

- Sites and Site Collections
- Understanding Creating Sites
- Creating a Team Site
- Quickly Changing the Theme
- Changing the Logo
- Change the Look Options
- Changing the Look of a Site

**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
- Restoring Permissions Inheritance
- Creating Customised Permission Levels

**Getting Started With Libraries**

- Understanding Library Apps
- Uploading a Single File
- Uploading Multiple Files
- Creating a New Document in a Library
- Creating a New Folder in a Library
- Selecting Files
- Reading a Document
- Downloading a Copy of a Document
- Editing a Document
- Deleting a File
- Restoring a Deleted File

**Advanced Lists**

- 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
- 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
- Deleting a List or Library

**SharePoint Workflows**

- Understanding Workflows
- Creating a New Workflow
- The Flow Information Page
- The Flow Designer
- Customising a Workflow
- The Flow Homepage
- Testing a Workflow
- Deleting a Workflow
- The Flow Mobile App

## **Site Templates**

- Understanding Site Templates and Subsites
- Creating a Communication Site
- Customising a Communication Site Home Page
- Creating a Blog Subsite
- The Blog Subsite
- Creating a New Blog Post
- Creating a Team Subsite
- Creating a Project Subsite

## **The SharePoint Mobile App**

- Signing in to the SharePoint Mobile App
- Navigating the SharePoint Mobile App
- Navigating a Site in the Mobile App
- Working With People
- Working With Me