

SharePoint – User Fundamentals – 1 Day**Overview**

This course is designed for users who need to learn the core functions of SharePoint for document management. This course is ideal for people who will be using SharePoint daily, adding, editing Documents and also working with Lists

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.

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 Online
- Team and Communication Sites Overview
- Roles and Responsibilities in a SharePoint Environment
- SharePoint Terminology
- Access to SharePoint Online – Web, File Explorer, Teams, Desktop Apps

Navigating a SharePoint Site

- Navigation Elements in a SharePoint site
- Navigating to Your Delve Profile
- Following a Site

Social Networking

- Overview of Delve
- Navigating to your Delve Account
- Editing your Profile Page
- Checking the Language and Region Settings
- Working with Favourites & Boards

Adding Documents

- Creating new files via SharePoint Online, Online Apps, Desktop Apps
- Creating Folders in a Document Library
- Live Document AutoSave
- Understanding MetaData
- Saving Files within the Online Apps
- Saving Files from the Desktop Apps

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Viewing and Editing Documents

- Opening Files from Desktop Apps vs Online
- Editing Files from Desktop Apps vs Online
- Working with Document Check Out/In
- Working with Document Version History
- Uploading single and multiple documents
- Renaming Files
- Copying and Moving Files
- Deleting and Restoring Files

Organising Your View of Files

- Document Views
- Sorting and Filtering document Views
- Pinning Files within a Library
- Searching for Files
- Understand Metadata
- Adding/Editing Metadata to new and existing documents

Collaborating and Sharing

- Adding Comments
- Co-Authoring Files
- Best Practice for Sharing Documents
- Sharing Documents Internally and Externally
- Sharing Files via Document Libraries, Desktop App, Email, File Explorer
- Manage Access including Stop Sharing

Other Ways to Access SharePoint Files

- Benefits and Disadvantages of Sync
- Syncing to File Explorer
- Creating shortcut to OneDrive
- Following sites
- Pin to Quick Access

Working with Lists

- Understanding Lists
- Navigating within Lists
- Creating a new Entry – Form vs Grid View
- Editing a List Entry
- Creating a Personal List
- Share a Personal Lists
- Working with Alerts on Lists
- Working with List Version History