

SharePoint 2013 End User

MTM IT Training

Tesfaye Gari

Training Outline

- Lesson 1: SharePoint 2013 Introduction
- Lesson 2: SharePoint List Basics
- Lesson 3: Library Basics
- Lesson 4: Working with Lists and Library Views
- Lesson 5: Working with Sites
- Lesson 6: Page Content
- Lesson 7: Forms Library
- Lesson 8: Site Columns and Content Types
- Lesson 9: Office Integration
- Lesson 10: Managing SharePoint Site Permissions
- Lesson 11: Participating in User Communities

Lesson 1: SharePoint 2013 Introduction

In this lesson, you will learn...

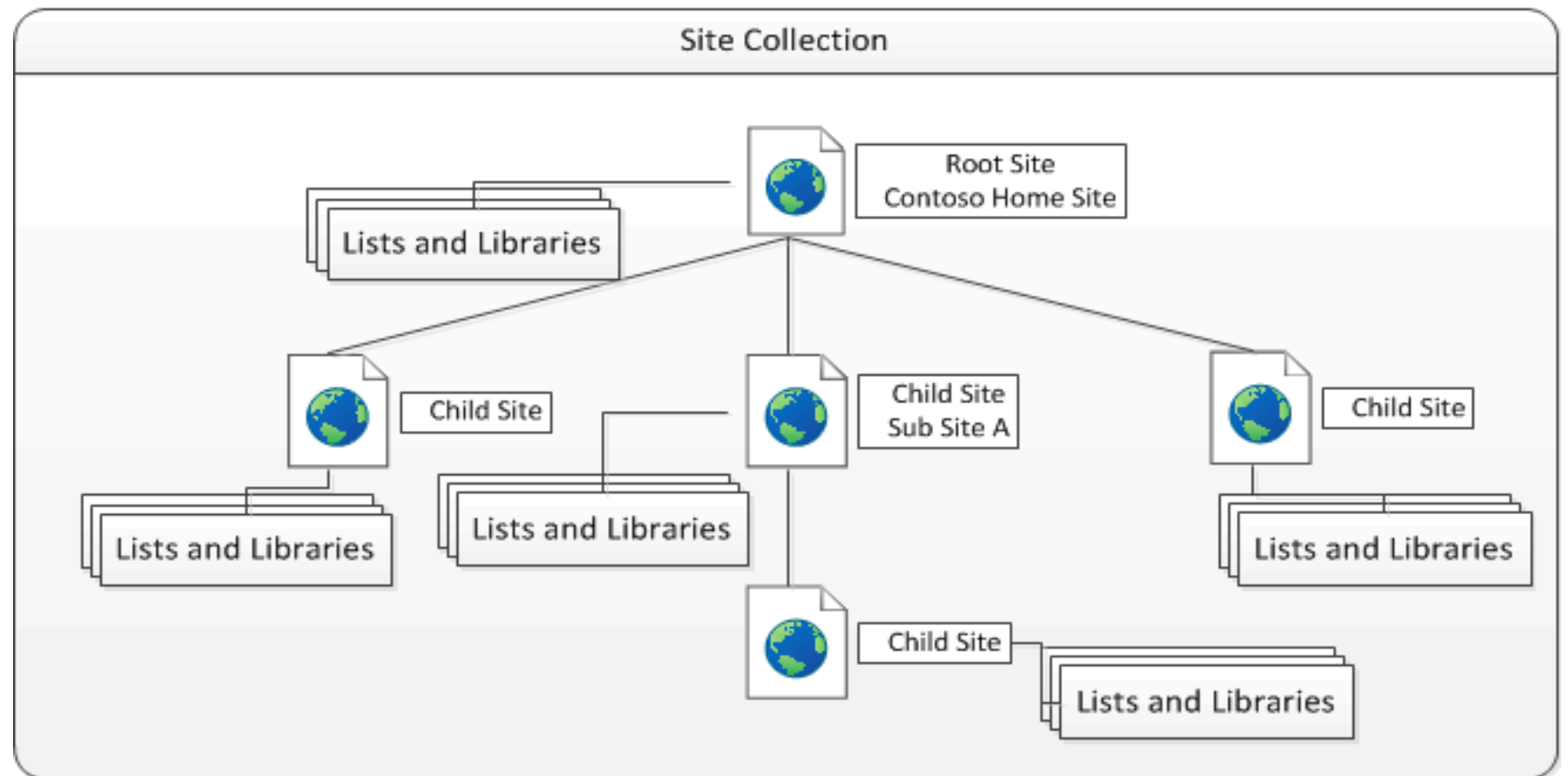
- About the versions of SharePoint
- About SharePoint site hierarchy
- About Team Site layout
- About navigation within a Team Site

SharePoint Versions

- SharePoint Foundation
- SharePoint Standard
- SharePoint Enterprise

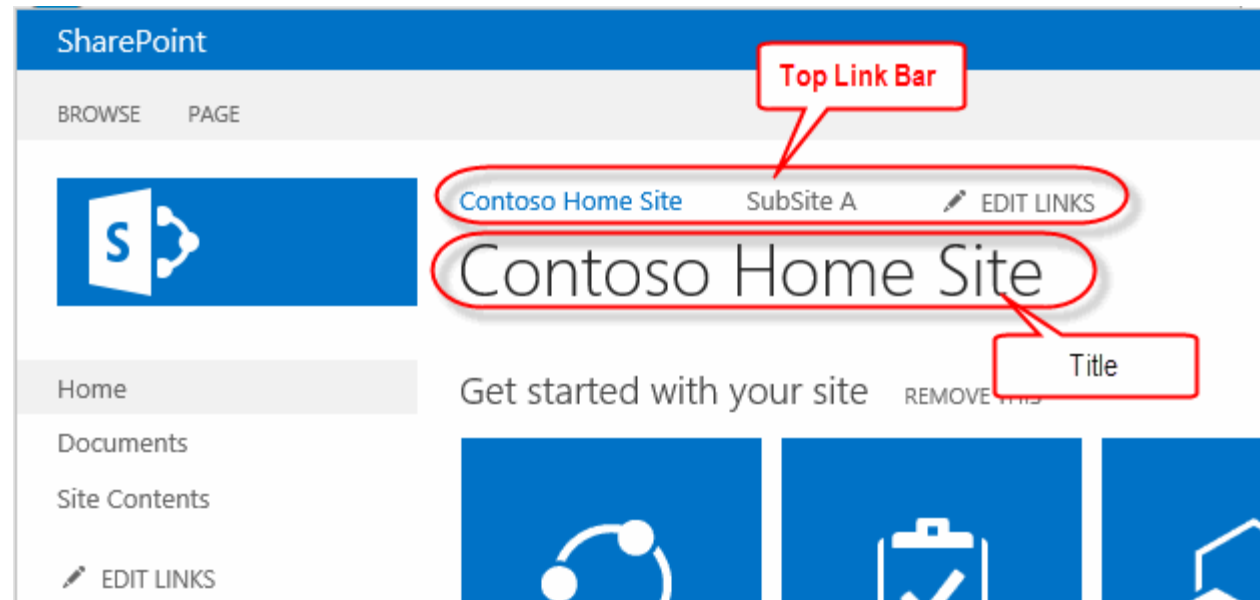
Team Site Layout and Navigation

- Layout



Presentation: Navigating a Team Site

- The Instructor will now present a walk-through on navigation in a SharePoint Team site



Lab

- Exercise 1: Team Site Navigation

Lesson 1: Conclusion

In this lesson, you have learned:

- About the different versions SharePoint offers.
- About the basic hierarchy of a Site Collection.
- About the basic menus and toolbars in a Team Site.
- How to navigate within a Team Site.

Lesson 2: SharePoint List Basics

In this lesson, you will learn...

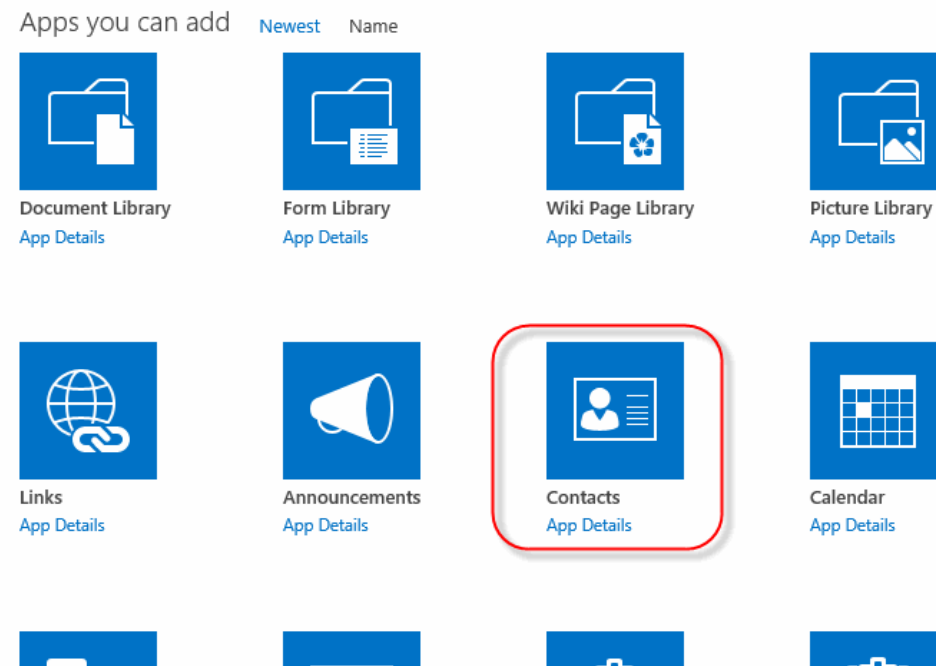
- About List Templates.
- How to work with default lists in a Team Site.
- How to create a new list from a List Template.
- How to create a custom list.
- How to control and validate input into list fields.
- How to link data from separate lists.

Creating Apps Using List Templates

- Links
- Announcements
- Contacts
- Calendar
- Discussion Board
- Promoted Links
- Tasks
- Issue Tracking
- Custom List
- External List
- Survey

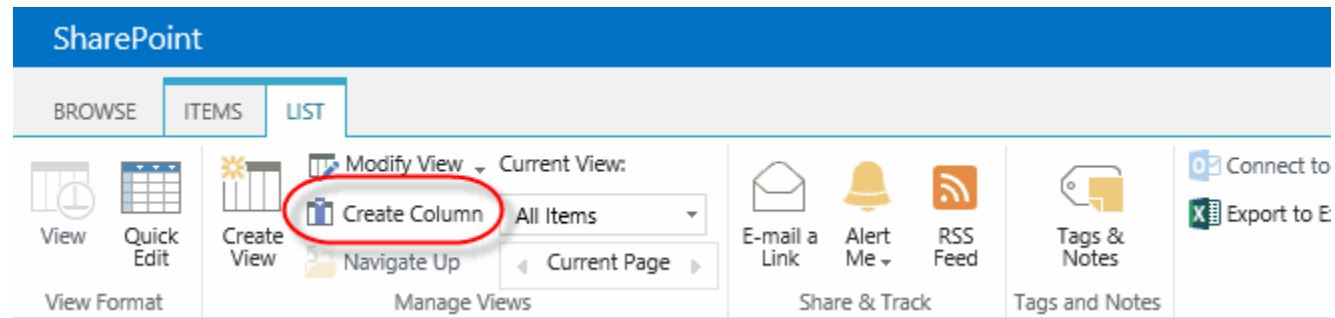
Presentation: Creating Lists Using List Templates

- The instructor will now present a walk-through on how to create new lists using some of the standard out-of-the-box list templates.



Presentation: Creating List Columns

- The instructor will now present a walk-through on how to add columns to a Custom List.



Presentation: Validating a List Column

- The instructor will now present a walk-through on how to enable validation on a custom list column.

Column Validation

Specify the formula that you want to use to validate the data in this column when new items are saved to this list. The formula must evaluate to TRUE for validation to pass.

Example: If your column is called "Company Name" a valid formula would be [Company Name]="My Company".

[Learn more about proper syntax for formulas.](#)

Formula:

=Birthday<TODAY()

Type descriptive text that explains what is needed for this column's value to be considered valid.

User message:

The birthday must be earlier than the current date.

Delete

OK

C

Lab

- Exercise 2: Working with Team Site Lists
- Exercise 3: Create Custom Lists and Columns
- Exercise 4: Create a SharePoint List with the Import Spreadsheet Template

Lesson 2: Conclusion

In this lesson, you have learned:

- How to work with various List Templates.
- How to work with default lists in a Team Site and add data to them.
- How to create a custom list.
- How to add columns to a list.
- How to control and validate input into list fields.
- How to link data from separate lists.

Lesson 3: Library Basics

In this lesson, you will learn...

- How to create new libraries using library templates.
- How to work with the different libraries in a default Team Site.
- How to add columns to a library.
- How to check out documents for editing.
- How to delete and restore documents from document libraries.
- How to enable versioning on a library
- How to revert a library document to an earlier version.

Library Templates

- Document Library
- Form Library
- Wiki Page Library
- Picture Library
- Data Connection Library
- Report Library
- Asset Library

Presentation: Creating Libraries

- The instructor will now present a walk-through on how to create a new Document Library.

Noteworthy



Document Library

Popular built-in app

[App Details](#)



Custom List

Popular built-in app

[App Details](#)



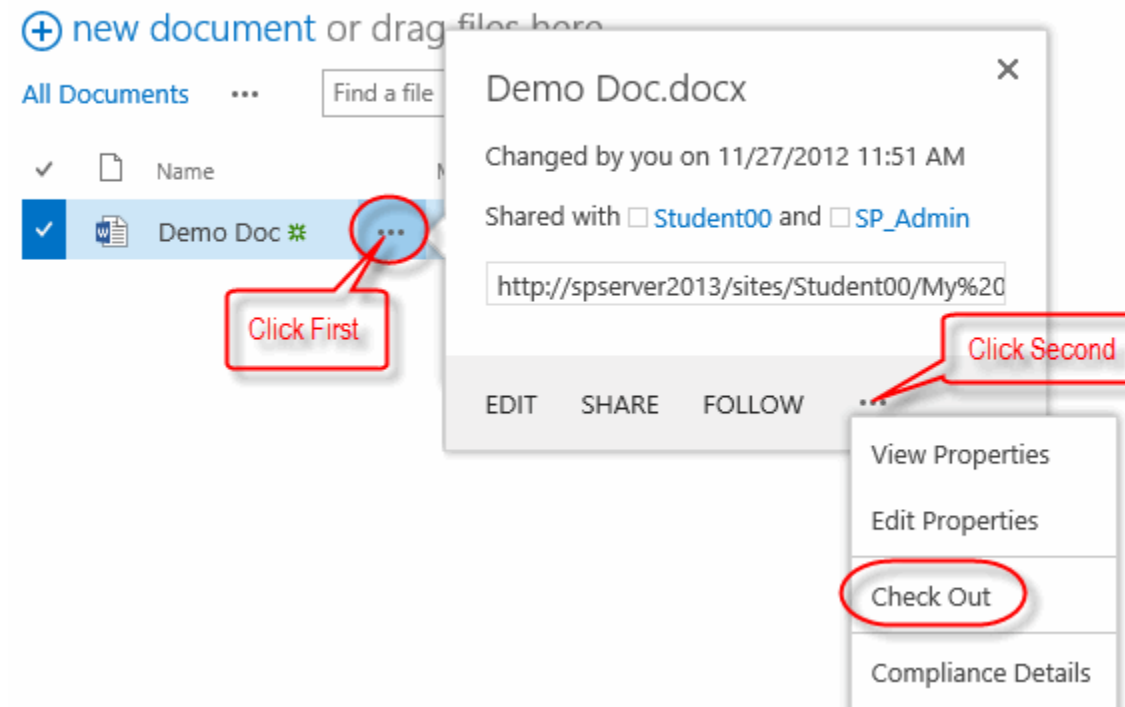
Tasks

Popular built-in app

[App Details](#)

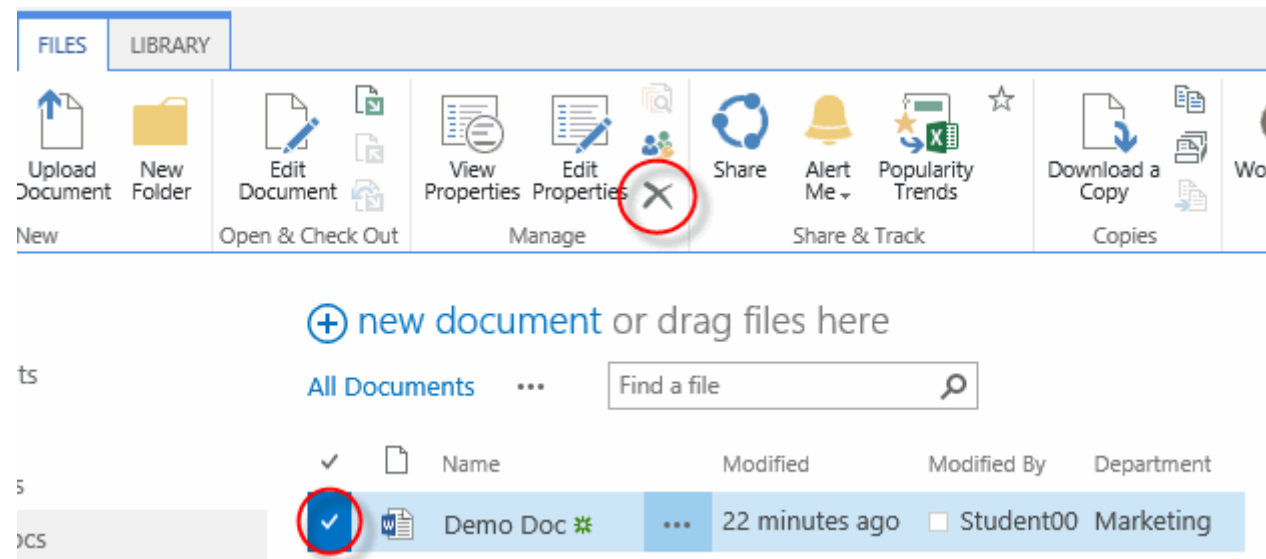
Presentation: Managing Documents and Versioning

- The instructor will now present a walk-through on how to use the Check Out feature.



Presentation: Deleting and Restoring Documents

- The instructor will now present a walk-through on how to delete a document from a document library.



Presentation: Versioning

- The instructor will now present a walk-through on how to enable versioning.

Document Version History

Specify whether a version is created each time you edit a file in this document library.
[Learn about versions.](#)

Create a version each time you edit a file in this document library?

☐ No versioning

☐ Create major versions

Example: 1, 2, 3, 4

☒ Create major and minor (draft) versions

Example: 1.0, 1.1, 1.2, 2.0

Optionally limit the number of versions to retain:

Lab

- Exercise 5: Working with Team Site Libraries
- Exercise 6: Creating Libraries
- Exercise 7: Document Versioning

Lesson 3: Conclusion

In this lesson, you have learned:

- How to create new libraries using library templates.
- How to work with the different libraries in a default Team Site.
- How to add columns to a library.
- How to check out documents for editing.
- How to delete and restore documents from document libraries.
- How to enable versioning on a library.
- How to revert a library document to an earlier version.

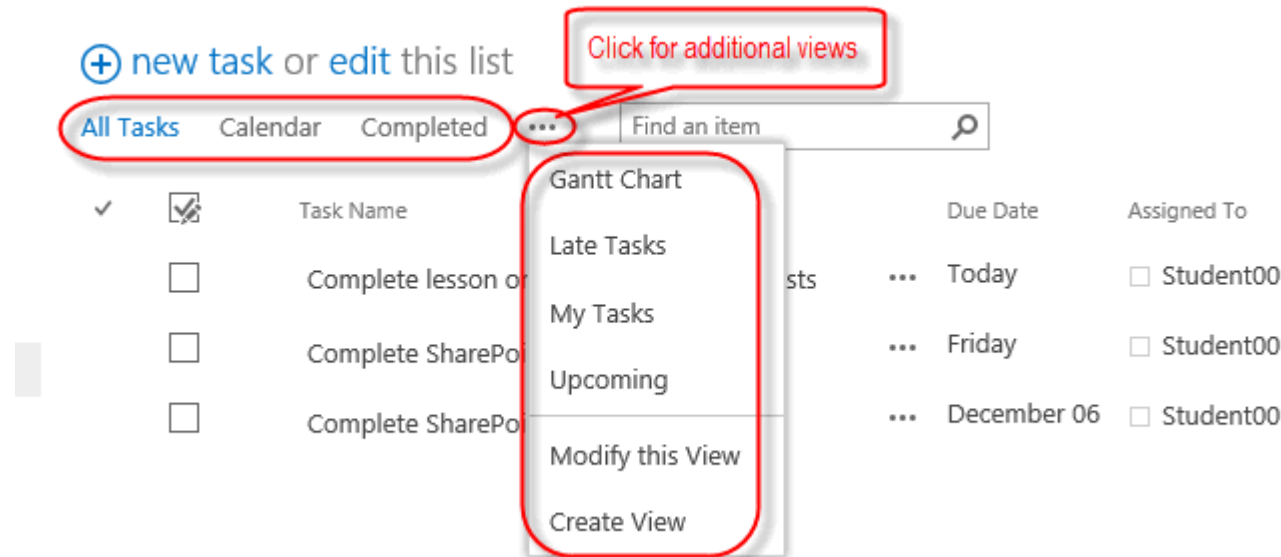
Lesson 4: Working with Lists and Library Views

In this lesson, you will learn...

- How to use default views built into lists and libraries.
- How to create personal views.
- How to create shared views.
- How to configure views.
- How to set the default view for a list or library.

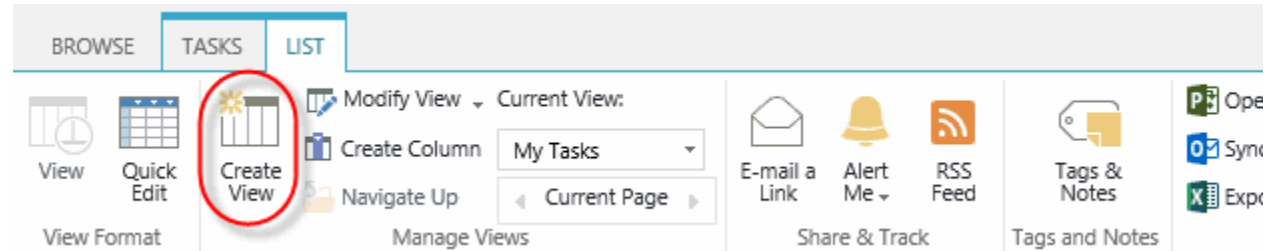
Presentation: Default Views

- The instructor will now present a walk-through that explores some of the default views.



Presentation: Custom Views

- The instructor will now present a walk-through on how to create a custom view using the default Tasks list.



Lab

- Exercise 8: Working with Views
- Exercise 9: Creating Public and Personal Views

Lesson 4: Conclusion

In this lesson, you have learned:

- How to use the default views built into lists and libraries.
- How to create personal views.
- How to create shared views.
- How to configure views.
- How to set the default view for a list or library.

Lesson 5: Working with Sites

In this lesson, you will learn...

- What Site Templates are.
- About the different types of Site Templates that come "out of the box" with different versions of SharePoint.
- How to create a new site using Site Templates.
- How to create a Project site.
- How to create a Team site.
- How to create a Community site.
- How to create a Blog site.
- How to manage the sites listed in the Top Link Bar.

Site Templates

- Team Site
- Blog
- Project Site
- Community Site
- Document Center
- Records Center
- Business Intelligence Center
- Enterprise Search Center
- Basic Search Center
- Visio Process Repository

Presentation: Creating Sites

- The instructor will now present a walk-through on how to create new child sites using the Team Site template.

Site Contents ▸ New SharePoint Site

Title and Description

Title:

Marketing

Description:

Web Site Address

URL name:

http://spserver2013/sites/Student00/marketing

Template Selection

Select a template:

Collaboration Enterprise

Team Site

Blog

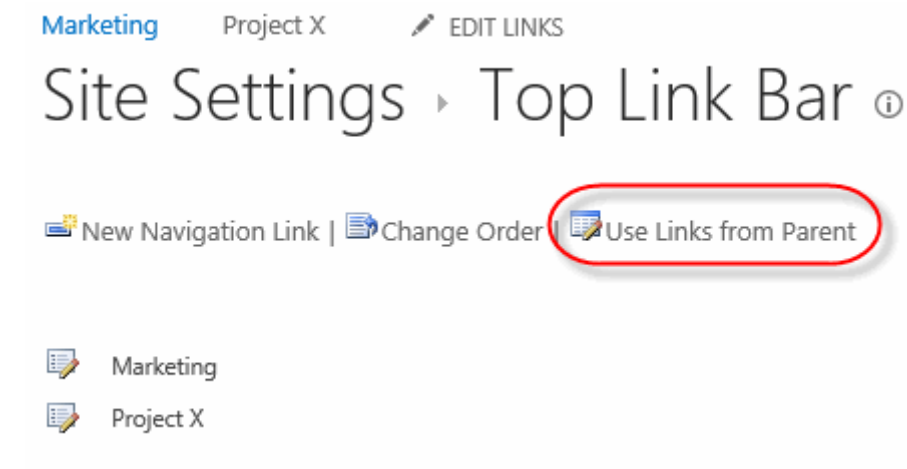
Project Site

Community Site

A place to work together with a group of people.

Presentation: Managing Site Navigation

- The instructor will now present a walk-through on how to manage navigation between parent and child sites.



Lab

- Exercise 10: Creating Team Sites
- Exercise 11: Creating a Meeting Workspace
- Exercise 12: Creating a Blog Site

Lesson 5: Conclusion

In this lesson, you have learned:

- What Site Templates are.
- About the different types of Site Templates that come "out of the box" with different versions of SharePoint.
- How to create a new site using Site Templates.
- How to create a Project site.
- How to create a Team site.
- How to create a Community site.
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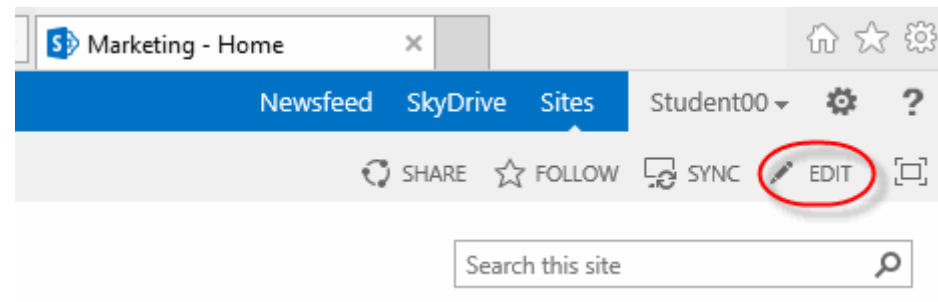
Lesson 6: Page Content

In this lesson, you will learn...

- What wiki pages are.
- What Web Part pages and Web Parts are.
- How to add content to the Team Site Home page.
- How to change the layout of the Team Site Home page.
- How to create a Web Part page.
- How to create a wiki page library.
- How to add Web Parts.
- How to manage Web Parts.

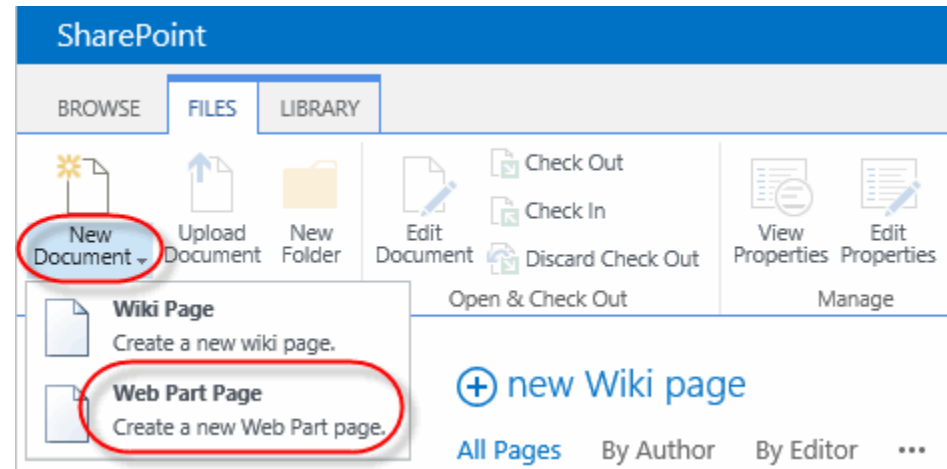
Presentation: Wiki Library Pages

- The instructor will now present a walk-through on how to edit the Home page of a Team Site.



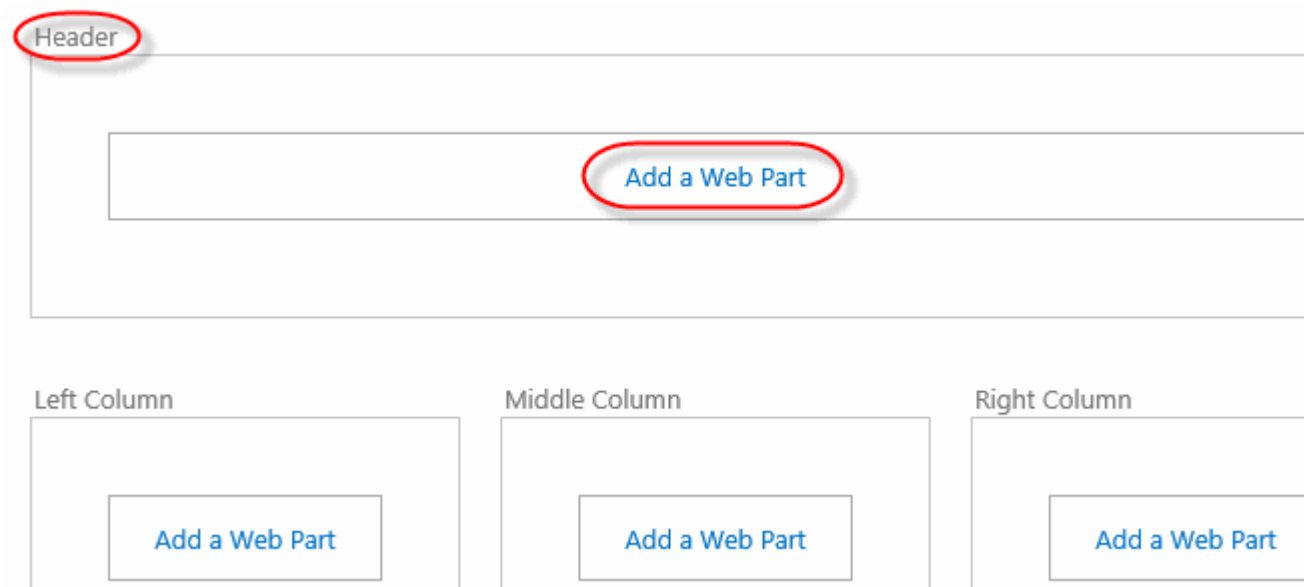
Presentation: Web Part Pages

- The instructor will now present a walk-through on how to create a new Web Part page in a Team Site.



Presentation: Working with Web Parts

- The instructor will now present a walk-through on how to add Web Parts to a web part page.



Lab

- Exercise 14: Working with Wiki Pages
- Exercise 15: Working with Web Part Pages and Web Parts

Lesson 6: Conclusion

In this lesson, you have learned:

- What wiki pages are.
- What Web Part pages and Web Parts are.
- How to add content to the Team Site Home page.
- How to change the layout of the Team Site Home page.
- How to create a Web Part page.
- How to create a wiki page library.
- How to add Web Parts.
- How to manage Web Parts.

Lesson 7: Forms Library

In this lesson, you will learn...

- What a Form Library is.
- How to create a Form Library.
- How to use InfoPath Designer to design a basic form template.
- How to publish an InfoPath Designer form template to a Form Library.
- How to designate form template fields as library columns.
- How to create instances of documents in a Form Library.

Form Library

- Creating a Form Library from a template

Contoso Home Site ▶ Add Apps ▶

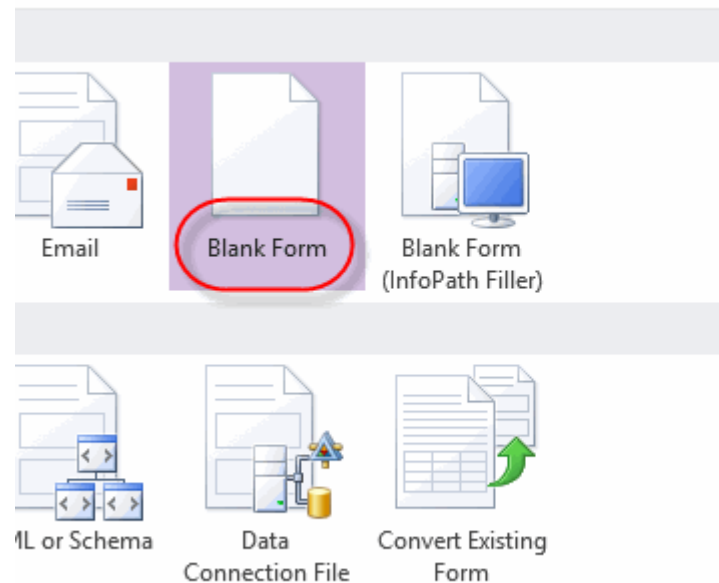


Form Library

A place to manage business forms like status reports or purchase orders. Form libraries require a compatible XML editor, such as Microsoft InfoPath

Presentation: Creating InfoPath Forms

- The instructor will now present a walk-through on how to create a simple form using Microsoft InfoPath Designer.



Blank Form



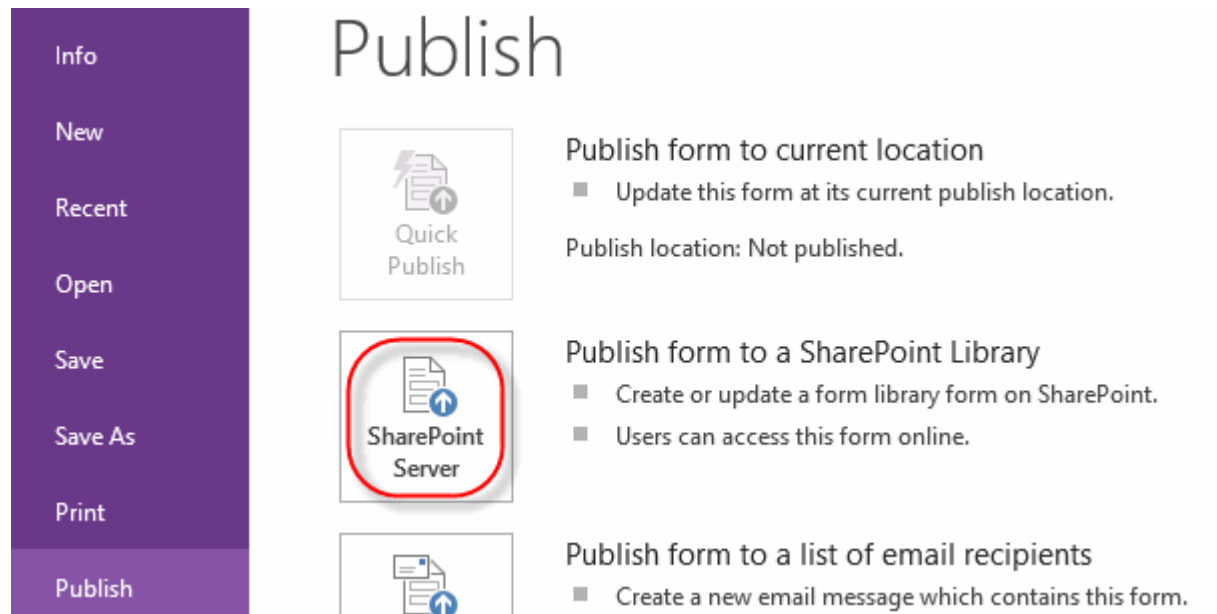
Start with a blank form.

- Choose a layout, add controls, create rules, and apply formatting.
- Publish to SharePoint or a network location.



Presentation: Publishing InfoPath Forms to SharePoint

- The instructor will now present a walk-through on how to publish an InfoPath form to a SharePoint site.



Lab

- Exercise 16: Creating and Publishing InfoPath Forms

Lesson 7: Conclusion

In this lesson, you have learned:

- What a Form Library is.
- How to create a Form Library.
- How to use InfoPath Designer to design a basic form template.
- How to publish an InfoPath Designer form template to a Form Library.
- How to designate form template fields as library columns.
- How to create instances of documents in a Form Library.

Lesson 8: Site Columns and Content Types

In this lesson, you will learn...

- About Site Columns.
- About Content Types.
- How to create Site Columns.
- How to create Content Types.
- How to create a document template for a Content Type.
- How to assign a Content Type to a list or library.
- How to create new items based on a custom Content Type.

Presentation: Site Column Gallery

- The instructor will now present a walk-through on how to explore the Site Column Gallery.

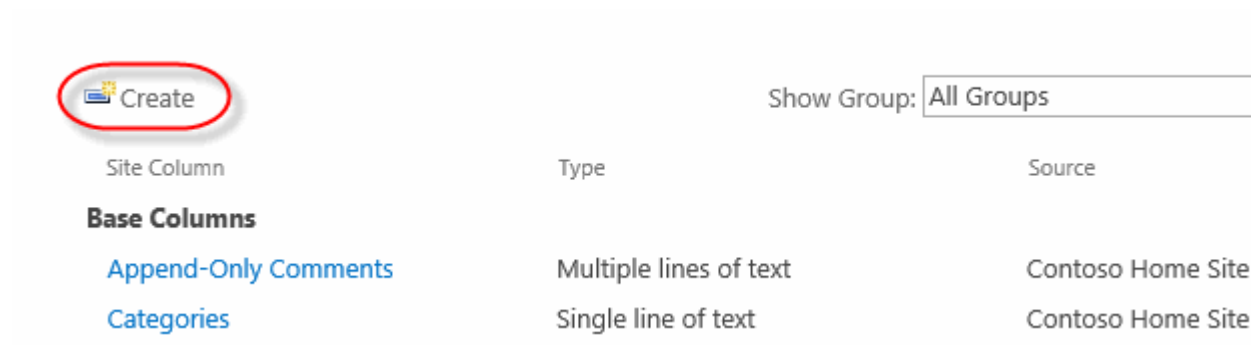
Create

Show Group: All Groups

Site Column	Type	Source
Base Columns		
Append-Only Comments	Multiple lines of text	Contoso Home Site
Categories	Single line of text	Contoso Home Site
End Date	Date and Time	Contoso Home Site
Language	Choice	Contoso Home Site
Start Date	Date and Time	Contoso Home Site
URL	Hyperlink or Picture	Contoso Home Site
Workflow Name	Single line of text	Contoso Home Site
Content Feedback		
Number of Likes	Number of Likes	Contoso Home Site
Number of Ratings	Number of Ratings	Contoso Home Site
Rating (0-5)	Rating (0-5)	Contoso Home Site
Core Contact and Calendar Columns		
Address	Multiple lines of text	Contoso Home Site
Anniversary	Date and Time	Contoso Home Site
Assistant's Name	Single line of text	Contoso Home Site
Assistant's Phone	Single line of text	Contoso Home Site
Birthday	Date and Time	Contoso Home Site
Business Phone	Single line of text	Contoso Home Site
Business Phone 2	Single line of text	Contoso Home Site

Presentation: Creating Site Columns

- The instructor will now present a walk-through on how to create a custom Site Column.



Presentation: Site Content Type Gallery


- The instructor will now present a walk-through on how to explore the Site Content Type gallery.

Create		Show Group: <input type="text" value="All Groups"/>
Site Content Type	Parent	Source
Business Intelligence		
Excel based Status Indicator	Common Indicator Columns	Contoso Home Site
Fixed Value based Status Indicator	Common Indicator Columns	Contoso Home Site
Report	Document	Contoso Home Site
SharePoint List based Status Indicator	Common Indicator Columns	Contoso Home Site
SQL Server Analysis Services based Status Indicator	Common Indicator Columns	Contoso Home Site
Web Part Page with Status List	Document	Contoso Home Site
Community Content Types		
Category	Item	Contoso Home Site
Community Member	Site Membership	Contoso Home Site
Site Membership	Item	Contoso Home Site
Digital Asset Content Types		
Audio	Rich Media Asset	Contoso Home Site
Image	Rich Media Asset	Contoso Home Site
Rich Media Asset	Document	Contoso Home Site
Video	System Media Collection	Contoso Home Site
Video Rendition	Rich Media Asset	Contoso Home Site
Display Template Content Types		
JavaScript Display Template	Document	Contoso Home Site
Document Content Types		

Presentation: Creating Content Types

- The instructor will now present a walk-through on how to create a custom Content Type.

Site Settings ▸ Site Content Types ⓘ

 Create	Show Group: <input type="text" value="All Groups"/>	
Site Content Type	Parent	Source
Business Intelligence		
Excel based Status Indicator	Common Indicator Columns	Contoso Home Site
Fixed Value based Status Indicator	Common Indicator Columns	Contoso Home Site

Lab

- Exercise 17: Creating and Working with Content Types
- Exercise 18: Adding a Content Type to a Library

Lesson 8: Conclusion

In this lesson, you have learned:

- About Site Columns.
- About Content Types.
- How to create Site Columns.
- How to create Content Types.
- How to create a document template for a Content Type.
- How to assign a Content Type to a list or library.
- How to create new items based on a custom Content Type.

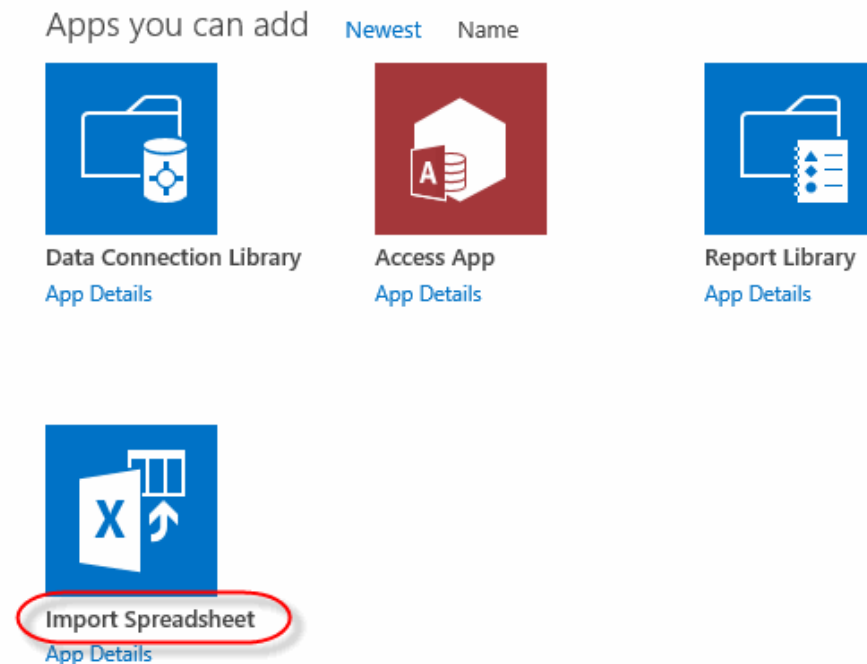
Lesson 9: Office Integration

In this lesson, you will learn...

- How to create a list from an Excel spreadsheet.
- To update a spreadsheet view of SharePoint list data.
- How to create an alert.
- How to subscribe and view an RSS feed from a SharePoint list.
- How to make a copy of a library in Outlook.
- How to use the Datasheet view.
- How to open and edit a list in Access.

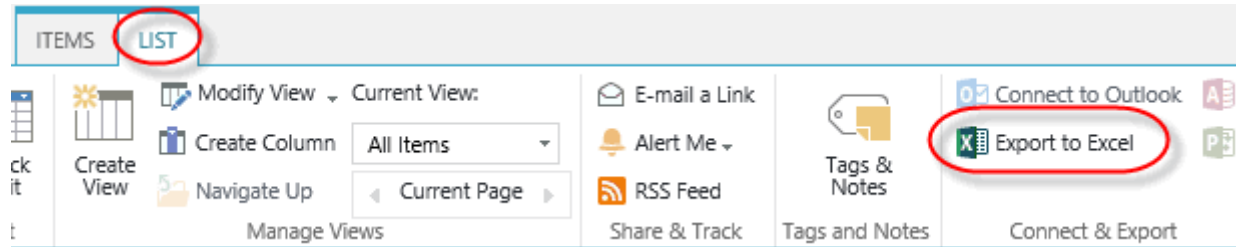
Presentation: Excel Integration

- The instructor will now present a walk-through on how to import data from an Excel spreadsheet and create a new SharePoint list.



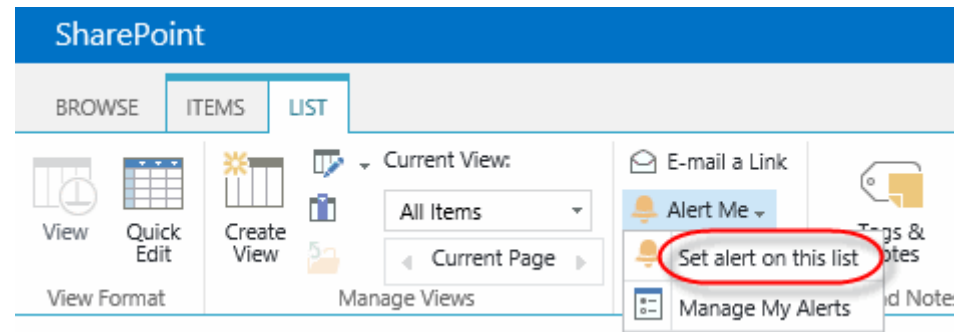
Presentation: Export List Data to Excel

- The instructor will now present a walk-through on how to export list data to an Excel spreadsheet.



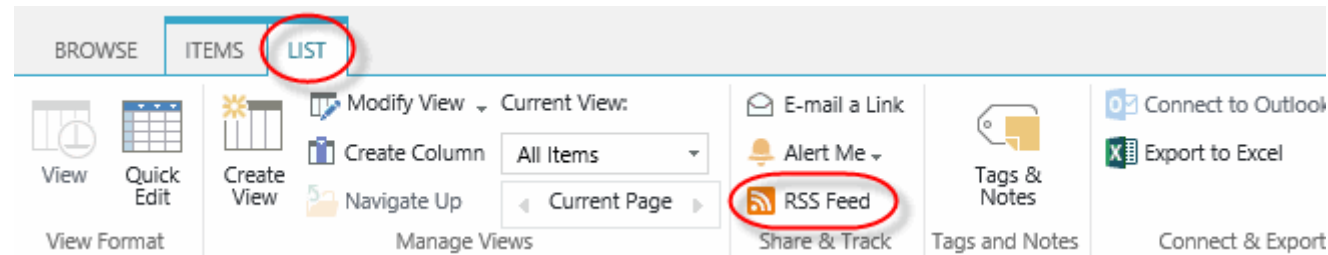
Presentation: Create an Alert

- The instructor will now present a walk-through on how to create an alert.



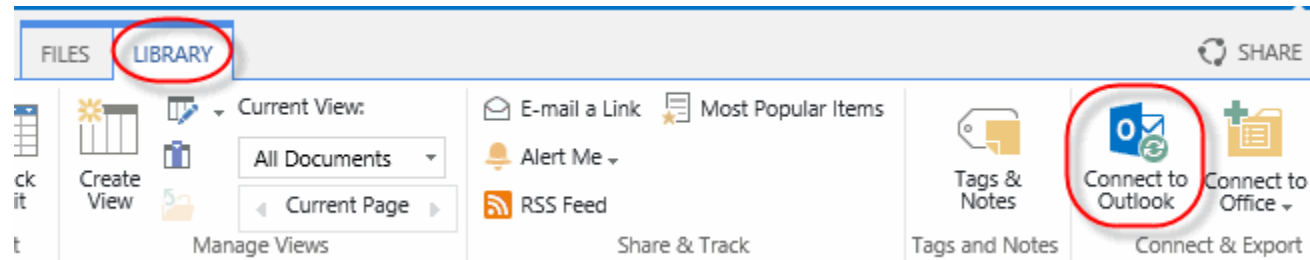
Presentation: Subscribe to a List's RSS Feed

- The instructor will now present a walk-through on how to subscribe to a SharePoint List RSS Feed.



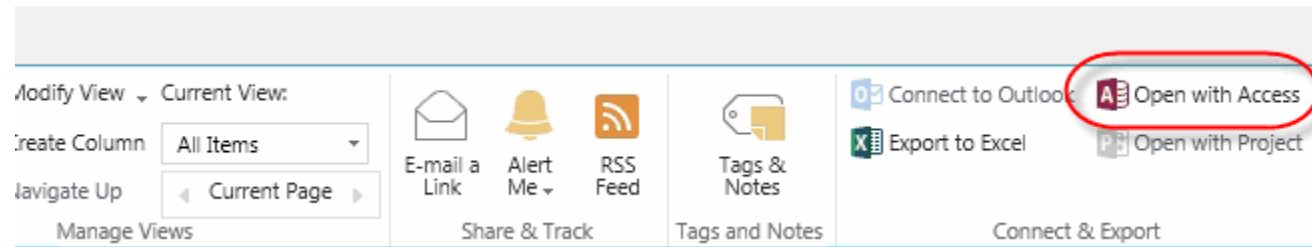
Presentation: Connect to Outlook

- The instructor will now present a walk-through on how to connect a library to Outlook.



Presentation: Open a List with Access

- The instructor will now present a walk-through on how to open a list with Microsoft Access.



Lab

- Exercise 19: Excel Integration
- Exercise 20: Outlook Integration
- Exercise 21: Access Integration

Lesson 9: Conclusion

In this lesson, you have learned:

- How to create a list from an Excel spreadsheet.
- How to update a spreadsheet view of SharePoint list data.
- How to create an alert.
- How to subscribe and view an RSS feed from a SharePoint list.
- How to make a copy of a library in Outlook.
- How to use the Datasheet view.
- How to open and edit a list in Access.
- How to configure and use SharePoint Workspace.

Lesson 10: Managing SharePoint Site Permissions

In this lesson, you will learn...

- About SharePoint groups.
- How to create SharePoint groups.
- How to assign permission in SharePoint.
- How to view permission levels.
- How to manage permission inheritance at the site level.
- How to manage permission inheritance at the list or library level.
- How to manage permission inheritance at the item level.

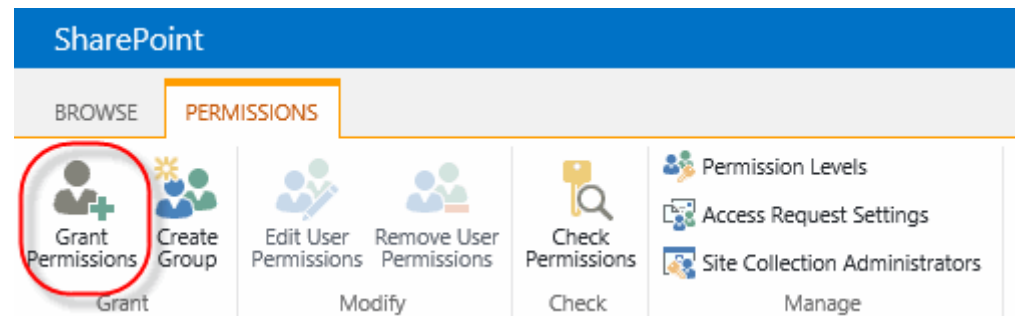
Presentation: View the Default SharePoint Groups

- The instructor will now present a walk-through on how to view the default groups in a Team Site.

<input type="checkbox"/>	<input type="checkbox"/> Name	Type	Permission Levels
<input type="checkbox"/>	<input type="checkbox"/> Contoso Home Site Members	SharePoint Group	Edit
<input type="checkbox"/>	<input type="checkbox"/> Contoso Home Site Owners	SharePoint Group	Full Control
<input type="checkbox"/>	<input type="checkbox"/> Contoso Home Site Visitors	SharePoint Group	Read
<input type="checkbox"/>	<input type="checkbox"/> Excel Services Viewers	SharePoint Group	View Only
<input type="checkbox"/>	<input type="checkbox"/> SP_Admin	User	Full Control

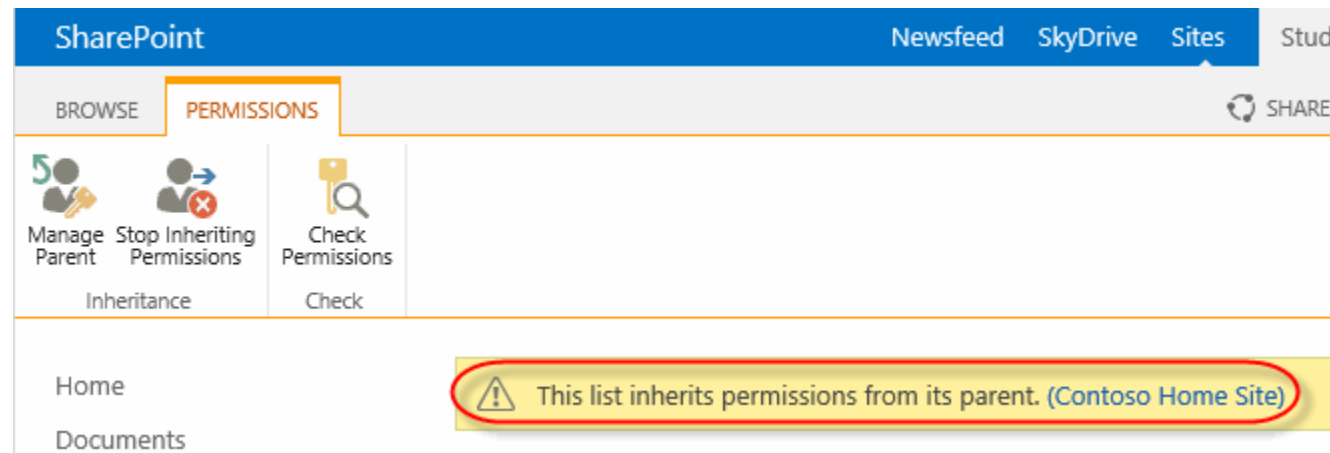
Presentation: Assigning Permissions

- The instructor will now present a walk-through on how to grant permissions by adding a user or group account into a SharePoint group.



Presentation: Permissions Inheritance

- The instructor will now present a walk-through on how to manage SharePoint permission inheritance.



Lab

- Exercise 22: Working with SharePoint Permissions

Lesson 10: Conclusion

In this lesson, you have learned:

- About SharePoint groups.
- How to create SharePoint groups.
- How to assign permission in SharePoint.
- How to view permission levels.
- How to manage permission inheritance at the site level.
- How to manage permission inheritance at the list or library level.
- How to manage permission inheritance at the item level.

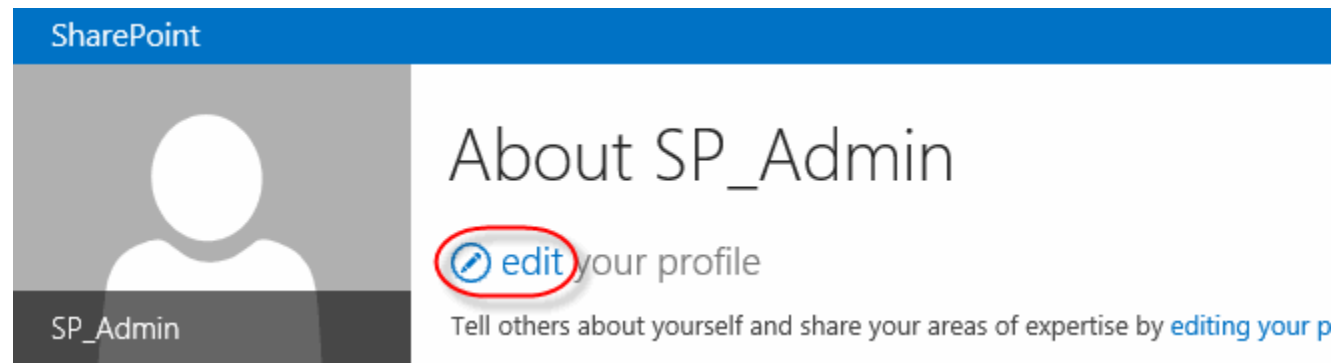
Lesson 11: Participating in User Communities

In this lesson, you will learn...

- How to edit a personal profile.
- How manage newsfeeds.
- How to add people newsfeeds.
- How to add documents newsfeeds.
- How to add sites newsfeeds.
- How to follow tags.
- How to store personal content.

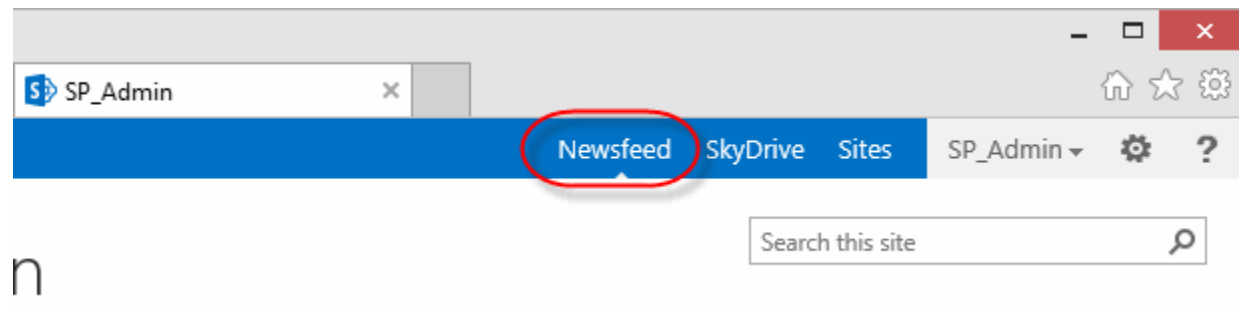
Presentation: Configure User Profiles and My Sites

- The instructor will now present a walk-through on how to edit a user profile.



Presentation: Newsfeeds

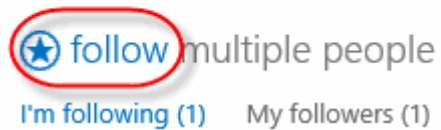
- The instructor will now present a walk-through on how to create and manage newsfeeds.



Presentation: People Newsfeeds

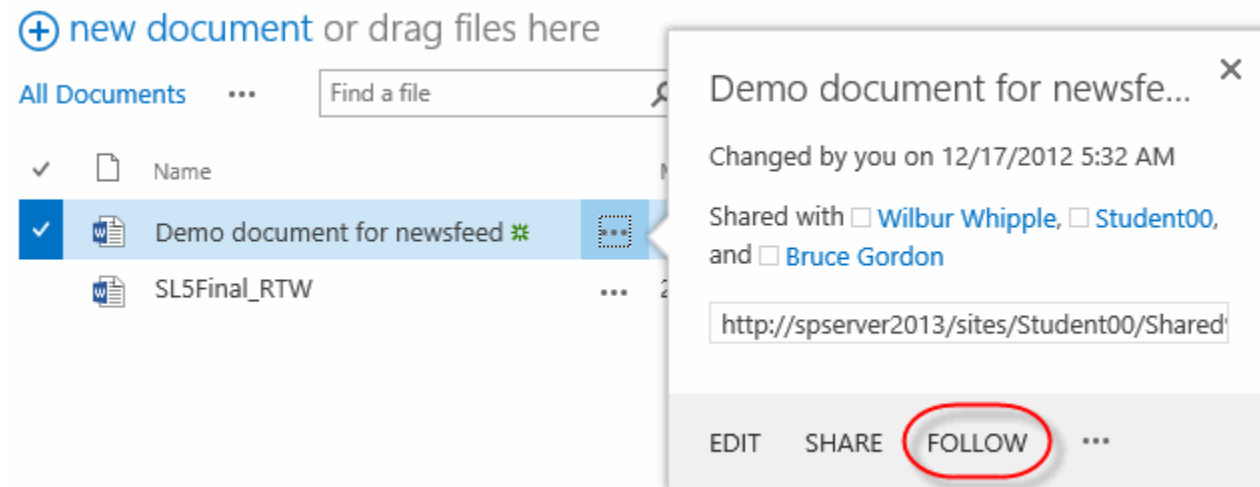
- The instructor will now present a walk-through on how to follow users and post messages.

People I'm following



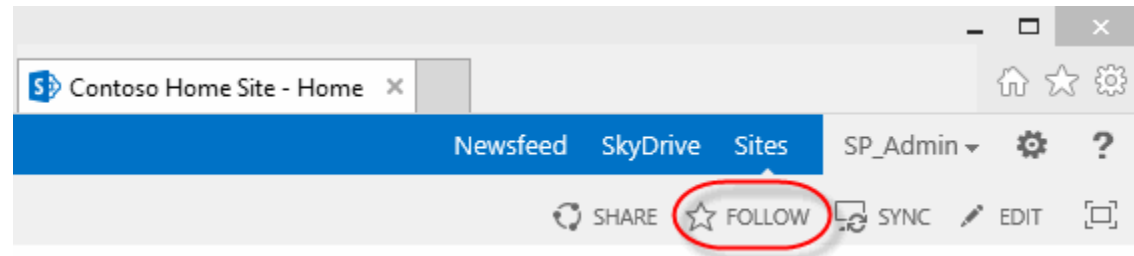
Presentation: Document Newsfeed

- The instructor will now present a walk-through on how to configure document newsfeeds.



Presentation: Sites Newsfeed

- The instructor will now present a walk-through on how to follow a site in your personal newsfeed.



Presentation: Tags Newsfeed

- The instructor will now present a walk-through on how to add tags to your personal newsfeed.

I'm following

2

people

1

documents

1

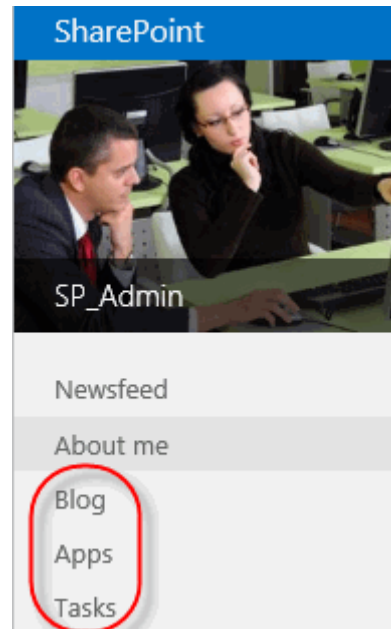
sites

1

tags

Presentation: Managing Personal Sites

- The instructor will now present a walk-through on how to edit your personal site and add documents and a blog post.



Lab

- Exercise 23: Managing and Viewing Personal Information and Content

Lesson 11: Conclusion

In this lesson, you have learned:

- How to edit a personal profile.
- How manage newsfeeds.
- How to add people newsfeeds.
- How to add documents newsfeeds.
- How to add sites newsfeeds.
- How to follow tags.
- How to store personal content.