

## Microsoft - SharePoint 2010 End User

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This three-day instructor-led course is for end users working in a SharePoint 2010 environment. The course teaches SharePoint basics such as working with lists and libraries as well as basic page customizations.

### Skills Gained

- Navigate a SharePoint 2010 Team Site.
- Create SharePoint lists.
- Customize SharePoint lists.
- Create SharePoint libraries.
- Manage library document versions.
- Create SharePoint list and library views.
- Create sub sites using various SharePoint templates.
- Create and edit Web page content.
- Create InfoPath Forms and Form libraries.
- Create Site columns and content types.
- Integrate Office applications with SharePoint 2010.
- Manage basic permissions of SharePoint 2010 resources.

### Who Can Benefit

This course is intended for information workers.

### Prerequisites

- Basic familiarity with Office products and computer navigation with a mouse.

### Course Details

#### Outline

##### Module 1: SharePoint 2010 Introduction

SharePoint 2010 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 discussion boards, 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.

## **Lessons**

SharePoint Versions

Team Site Layout and Navigation

Lab 1: None

- None

After completing this module, students will be able to: Understand the versions of SharePoint.

Understand SharePoint site hierarchy.

Understand Team Site layout.

Understand navigation within a Team Site.

Module 2: SharePoint List Basics

Lists are a fundamental building block in SharePoint that provide 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**

List Templates

Creating Lists

List Columns

Column Validation

Calendars

Lab 1: Exercises in This Lesson

- Working with Team Site Lists
- Create Custom Lists and Columns
- Create a SharePoint List with the Import Spreadsheet Template

After completing this module, students will be able to: Understand List Templates.

Work with default lists in a Team Site.

Create a new list from a List Template.

Create a custom list.

Add columns to a list.

Control and validate input into list fields.

Link data from separate lists.

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**

Library Templates

Creating Libraries

Managing Documents and Versioning

Lab 1: Exercises in This Lesson

- Working with Team Site Libraries
- Creating Libraries
- Document Versioning

After completing this module, students will be able to: Create new libraries using library templates.

Work with the different libraries in a default Team Site.

Add columns to a library.

Check out documents for editing.

Delete and restore documents from document libraries.

Enable versioning on a library.

Revert a library document to a an earlier version.

#### Module 4: Working with Lists and Library Views

This SharePoint 2010 End User class is for end users and site owners/managers new to working in a SharePoint 2010 environment. The course teaches SharePoint basics such as working with lists and libraries, basic page customization, working with forms and managing site permissions and users.

##### **Lessons**

Default Views

Custom Views

##### Lab 1: Exercises in This Lesson

- Working with Views
- Creating Public and Personal Views

After completing this module, students will be able to: Use default views built into lists and libraries.

Create personal views.

Create shared views.

Configure views.

Set the default view for a list or library.

#### 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

Site Navigation

##### Lab 1: Exercises in This Lesson

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

After completing this module, students will be able to: Understand what Site Templates are.

Understand the different types of Site Templates that come "out of the box" with different versions of SharePoint.

Create a new site using Site Templates.

Create a Blank site.

Create a Team site.

Create a Meeting Workspace site.

Create a Blog site.

Manage the sites listed in the Top Link Bar.

#### 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 wiki style pages. Another method that has been part of SharePoint since the beginning is the use of Web Parts and Web Part pages. Both techniques are similar in the output that can be created, and both Web Part pages and wiki pages share the ability to add Web Parts to them. Web Part pages still have one advantage in that you can connect Web Parts so information can pass between them; that option is not available on a wiki page.

##### **Lessons**

Wiki Library Pages

Web Part Pages

Working with Web Parts

##### Lab 1: Exercises in This Lesson

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

After completing this module, students will be able to: Understand what wiki pages are.

Understand what Web Part pages and Web Parts are.

Add content to the Team Site Home page.

Change the layout of the Team Site Home page.

Create a Web Part page.

Create a wiki page library.

Add Web Parts.

Manage 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.

### Lessons

Creating a Forms Library

Creating InfoPath Forms

Publishing InfoPath Forms to SharePoint

### Lab 1: Exercises in This Lesson

- Creating and Publishing InfoPath Forms

After completing this module, students will be able to: Understand what a Form Library is.

Create a Form Library.

Use InfoPath Designer to design a basic form template.

Publish an InfoPath Designer form template to a Form Library.

Designate form template fields as library columns.

Create instances of documents in a Form Library.

## 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

Site Column Gallery

Creating Site Columns

Site Content Type Gallery

Creating Content Types

### Lab 1: Exercises in This Lesson

- Creating and Working with Content Types
- Adding a Content Type to a Library

After completing this module, students will be able to: Understand Site Columns.

Understand Content Types.

Create Site Columns.

Create Content Types.

Create a document template for a Content Type.

Assign a Content Type to a list or library.

Create new items based on a custom Content Type.

## 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 SharePoint Workspace. 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.

### Lessons

Excel Integration

Outlook Integration

Access Integration

SharePoint Workspace

### Lab 1: Exercises in This Lesson

- Excel Integration
- Outlook Integration
- Access Integration

After completing this module, students will be able to: Create a list from an Excel spreadsheet.

Update a spreadsheet view of SharePoint list data.

Create an alert.

Subscribe and view an RSS feed from a SharePoint list.

Make a copy of a library in Outlook.

Use the Datasheet view.

Open and edit a list in Access.

Configure and use SharePoint Workspace.

#### 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.

##### **Lessons**

SharePoint Groups

Assigning Permissions

Permission Levels

Permissions Inheritance

#### Lab 1: Exercises in This Lesson

- Working with SharePoint Permissions

After completing this module, students will be able to: Understand SharePoint groups.

Create SharePoint groups.

Assign permission in SharePoint.

View permission levels.

Manage permission inheritance at the site level.

Manage permission inheritance at the list or library level.

Manage permission inheritance at the item level.

#### Module 11: Participating in User Communities

SharePoint offers users a place for social collaboration in the form of My 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.

##### **Lessons**

Configure User Profiles and My Sites

Managing Colleagues and Team Members

Managing My Content

Using Tags and Notes

#### Lab 1: Exercises in This Lesson

- Managing and Viewing Personal Information and Content

After completing this module, students will be able to: Edit a personal profile.

Control who can view information within a profile.

Add colleagues and team members.

Store personal content.

Add tags and notes.

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