

SharePoint 2013 Level 2

Audience This course is intended for persons familiar with the basics of SharePoint and creating a SharePoint site for collaboration. They should be skilled in the basics of creating and managing a SharePoint site with subsites.

Description The course uses a combination of lecture, hands-on practice, and independent exercises to teach learners how to create and manage wiki libraries; use social collaboration tools/features; develop a form library and create an InfoPath form; create and manage content types; add a workflow; synchronize SharePoint with Outlook; optimize SharePoint for a mobile device; manage records.

Objectives Upon successful completion of the class, students should be able to:

- Create and manage new and existing collaboration features such as Wikis, Newsfeed, and Yammer
- Create and manage a form and reports library,
- Create and use an InfoPath form template,
- Review permissions management for sites, groups, users, web parts, and apps
- Discuss the use of content types, and how they are applied to lists and libraries,
- Add and run a workflow,
- Synchronize SharePoint with Outlook,
- Configure a SharePoint view for mobile devices,
- Add a Search Box web part and configure Search Results,
- Manage records in SharePoint (optional appendix).

Length 1 day

-
- | | |
|--|--|
| <p>I. Creating and Managing a Wiki Library</p> <ul style="list-style-type: none">A. Managing Sites and Site CollectionsB. Creating a Wiki LibraryC. Creating Linked Wiki PagesD. Adding Content to Wiki PagesE. Managing Wiki Pages | <ul style="list-style-type: none">B. Sharing with About Me/My SiteC. Adding a Yammer Web Part (Cloud-based)D. Managing a Yammer Feed (Cloud-based)E. Determining a Reputation Ranking ScaleF. Configuring and Applying Reputation Rankings |
| <p>II. Social Collaboration Tools</p> <ul style="list-style-type: none">A. Adding the Newsfeed Web Part | <ul style="list-style-type: none">G. Synchronizing SharePoint with Outlook Calendar and ContactsH. Configuring a SharePoint site to appear in a Mobile View |



III. Managing Forms Libraries

- A. Managing documents in a Library
- B. Creating a Form Library
- C. Understanding Microsoft InfoPath?
- D. Creating an InfoPath Form
- E. Using an InfoPath Template to Create Documents
- F. Converting a Document to an InfoPath Form
- G. Modifying Form Documents

IV. Managing Permissions (review)

- A. Managing Permissions
- B. Managing Groups
- C. Assigning Permission Levels
- D. Setting Permissions for Specific Web Parts
- E. Setting Permissions for Specific Items in a Web Part

V. Managing Content Types

- A. Understanding Content Types
- B. Creating a New Content Type
- C. Adding/Deleting a Column to a Content Type
- D. Associating a Content Type with a List or Library

VI. Managing Workflows

- A. Understanding a Workflow
- B. Adding a Workflow to a Library
- C. Running a Workflow
- D. Modifying a Workflow
- E. Creating a Workflow with SharePoint Designer

VII. Adding a Search Box to a Site

- A. Adding a Search Box Web Part
- B. Adding the Search Results Web Part
- C. Configuring the Search Results Web Part

Appendix A: Discussing Record Management in SharePoint

- A. Determining Record criteria
- B. Adding a Records Center Site
- C. Configuring a Records Center Site
- D. Converting Documents to Records
- E. Managing Connections to the Records Center