SharePoint 2013 Training

Fundamentals

Intended for: Power User / Site Administrator
Forms and Workfows Designer / Business Intelligence Analyst

Prerequisites: None

OVERVIEW

The SharePoint Fundamentals class presents all the essential SharePoint features and information organization decision points. The course does not require any prior knowledge of SharePoint. If you've already been working with SharePoint, the course will clear up areas that might be confusing and introduce you to new not so obvious functionality.

Learn core SharePoint features

- Learn to use sites, lists, columns, views, versions, alerts
- Use co-authoring and track changes to make real time document editing simple
- Utilize metadata and folders together to make content findable and manageable
- Manage permissions, site templates, features, and recycle bin
- Understand the different page types and expose the right information using web parts
- Use newsfeed to follow colleagues' activities, and share expertise through user profile
- Learn out of box approval workflows
- Create a site collection mapped to organizational structure from start to finish

Improve business processes with forms and workflows

- Design InfoPath forms mapped to SharePoint lists and libraries to collect information
- Create SharePoint Designer workflows that process information submitted through forms
- Customize approval workflows through SharePoint Designer

Get insights from business intelligence

- Utilize Excel data model, pivot tables, and PowerView to create reports
- Create SharePoint pages and dashboards to deliver reports
- Use PowerPivot to enhance Excel data model
- Get data from APIs using Power Query
- Create Power Map reports

1. Definitions, History, and Expectations

- Definitions
- History
- Editions
- How to Make SharePoint Successful

2. Sites Organization

- Content Creation and Organization
  - Site collection
  - Site
  - Top link bar
  - App launcher
- Site navigation
  - Quick launch bar
  - Site contents
- Site Templates and Features
  - Features
  - Site template comparison List specific features

3. List

- Columns
- Filters and metadata navigation
- Views
- Form configuration
- Versions
- Alerts
- Large lists and indexed columns Pages, Web Parts, Apps, and Themes

4. Documents

- Columns, views, managed metadata
- Editing documents
  - Co-authoring and track changes
  - Using Office Online

- Versions
    - When are version created
    - Check out - check in
    - Major, minor, and approval
- Syncing using OneDrive Pro
- Folders vs. metadata

5. Tasks and Calendars

- Tasks
    - Organize for project management
        - Indents
        - Timeline
    - Stay informed
        - Email notifications
        - Tasks app and Outlook integration
- Calendars
    - Views
    - Connect to Outlook
    - Overlays in SharePoint

6. Search and Delve

- List search
- Site search and search center
- Delve – a new search and findability experience

7. Basic Workflows

- Definitions
- Review and Approval workflows
- Create workflow association
- Start a workflow on a item
- Participate in a workflow

8. Web Parts, Apps, Pages

- Web Parts
    - Adding to the page
    - Properties
- Apps
    - App store
- Types of Pages

9. Newsfeed, User Profile, Personal Site

- My site
- Newsfeed
- User profile
- Personal site

10. Security

- Authentication vs. authorization
- Permission levels
- Site collection administrator
- Azure Active Directory role - auditing user activity
- SharePoint groups
- External users

11. List and Site Templates

- List and site templates
- List thresholds
- Site content and structure tool from Publishing Infrastructure Feature

12. Project: Libraries and Lists

- Research documents
  - Large document library (not collaborative)
  - Permissions by folder
  - Views without folders
  - Metadata creation and navigation
- Project site management
  - Project directory
  - Project site template

13. InfoPath in SharePoint

- Form Design
  - o Fields / columns
  - o Visual layout
  - o Logic and rules
  - o Validation
  - o External data
- InfoPath Form Web Part
- List forms vs. form library

14. Workflows with SharePoint Designer 2013

- Introduction
- Two platforms
- Terminology
- Workflow types and association
- Security – app step
- Information management polices

15. Workflows web services

- JSON and dictionary actions
- SharePoint REST APIs
- Read and write data from SharePoint

16. Workflow deployment

- Move
- List template
- Update

17. Business Intelligence Introduction

- Definition
- Information collection, analysis, and delivery
- Microsoft product descriptions

18. Excel and Data Modeling

- Excel Data Model
    - o Create tables
    - o Identify relationships
    - o PowerPivot – advanced data model manipulation
- Presentation
    - o Pivot tables and charts
    - o Slicers and conditional formatting
    - o PowerView
- Publishing to SharePoint
    - o Publishing options and permissions
    - o Pages and web parts

19. External Connections and Data Refresh

- External Connections
    - o SharePoint Lists – OData Feed
    - o Azure SQL Server
- PowerBI App
    - o Enable Data Refresh
- Data connection details
    - o Location
    - o Authentication
    - o Secure Store

20. Excel with PowerPivot

- Import data and create relationships
- Calculated columns and DAX
- Measures, hierarchies, and KPIs
- PowerBI Admin Center

21. Excel PowerQuery

- Getting data using PowerQuery

22. Excel PowerMap

- Use PowerMap

23. PowerBI Admin Center

- Gateways and datasources