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Introducing CustomGuide Training Manuals

A proven leader in the computer training industry, CustomGuide has been the key to successful training for thousands of students and instructors across the globe.

This manual is designed for computer users of all experience levels. Novice users can use it to learn skills such as formatting text, while advanced users can use it to learn more challenging skills like creating their own templates.

All this information is quickly accessible. Lessons are broken down into basic step-by-step instructions that answer “how-to” questions in minutes. Print a complete training manual or a single page of instructions.

Here’s how a CustomGuide manual is organized:

Chapters
Each manual is divided into several chapters. Not sure what’s in a chapter? Look at the table of contents at the beginning of the manual. It lists each lesson and its subtopics, so you can find exactly what you need.

Lessons
Each chapter contains lessons on related topics. Each lesson explains a new skill or topic and contains an exercise to provide hands-on-experience. These skills can also be practiced using CustomGuide’s Online Training.

Review
A review is included at the end of each chapter. Use these quiz questions and answers to assess the user’s learning. Interactive quizzes are also available online for a more real-life skills assessment with CustomGuide’s software simulation.
How it Works

1. **Open Microsoft Word**
   Customizable courseware is provided as simple-to-use, editable Microsoft Word documents. You can use Microsoft Word to create personalized training materials in minutes!

2. **Select Topics**
   Select the content needed from CustomGuide’s award-winning training manual library. Mix and match topics between titles, such as Microsoft Outlook and SharePoint, to create exactly what you need.

3. **Customize**
   Arrange topics in the order you want—the manual automatically updates (click inside the Table of Contents > Click the References Tab > Select Update Table in the Table of Contents group) to reflect changes. Add the organization’s name and logo for a professional “in-house” look.

4. **Print and Distribute**
   Print as many copies as needed on site, without paying any per-unit royalties or maintaining physical inventories. Print single-page handouts, a group of related lessons, or a complete manual. It’s fast, convenient, and very affordable.

5. **Teach and Learn**
   Use our customizable training materials in your own classroom. The included Instructor Guide saves trainers precious time by not having to create their own content and lesson plans. Students appreciate the colorful illustrations, the down-to-earth writing style, and the convenience of having a reference guide to take home.
Welcome to the first chapter of Microsoft SharePoint 2013! SharePoint is a tool that makes it easier for people to share important information and collaborate on tasks, documents, and projects.

If you are familiar with using the internet you are well on your way to being an effective SharePoint user.

This chapter will cover the basic information you need to begin working with SharePoint, such as how it is supposed to be used and how to access it.

**Note:** This training manual is intended for end-users of SharePoint, the people who will use SharePoint every day. We will not discuss how to configure or set up SharePoint. Some later chapters discuss basic customization that a power user may take advantage of, but the lessons are intended for end users.
Introduction to SharePoint

SharePoint is a web-based program that acts as a hub for sharing information, and storing files, and collaborating within an organization. This centralized platform gives everyone access to the same information, makes collaborative tasks easier, and helps you manage deadlines and projects.

Log-in Screen

Your SharePoint administrator will provide you with login details.

1. Enter your SharePoint Credentials.
2. Click OK.

What’s New in SharePoint 2013

<table>
<thead>
<tr>
<th>SharePoint 2013 New Features</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>New Look</strong></td>
</tr>
<tr>
<td>The general layout has stayed similar, but the new and improved look goes a long way to making SharePoint a cleaner, better looking product.</td>
</tr>
<tr>
<td><strong>Office/Social Integration</strong></td>
</tr>
<tr>
<td>Access your OneDrive, Outlook People, and Calendar from SharePoint if your company uses Exchange.</td>
</tr>
<tr>
<td><strong>Increased Media Support</strong></td>
</tr>
<tr>
<td>HTML 5 and Silverlight players are now supported on SharePoint 2013.</td>
</tr>
<tr>
<td><strong>Improved Office 2013 Integration</strong></td>
</tr>
<tr>
<td>Office 2013 products have been designed to integrate well with SharePoint 2013. They have modifications that enable you to use them alongside SharePoint seamlessly.</td>
</tr>
<tr>
<td><strong>Expanded Task Tracking</strong></td>
</tr>
<tr>
<td>See all your tasks centrally, both those assigned to you in SharePoint and those created in other Office applications, if your company uses Exchange.</td>
</tr>
<tr>
<td><strong>On Page Editing</strong></td>
</tr>
<tr>
<td>Create and edit Lists on the same page, just as you would if you were working in Word or Excel.</td>
</tr>
<tr>
<td><strong>Design Manager</strong></td>
</tr>
<tr>
<td>Design a SharePoint site from scratch or change master pages by using the new Design Manager. This gives even more control over the look and feel of your site.</td>
</tr>
<tr>
<td><strong>Apps</strong></td>
</tr>
<tr>
<td>Develop, install, manage, and use new apps. SharePoint 2013 includes “apps” as standalone programs that solve or perform specific functions.</td>
</tr>
</tbody>
</table>
Understand the SharePoint Program Screen

The SharePoint Screen

1. **Ribbon**: Use the tabs to access the commands and settings for any page.

2. **Top link bar**: Click a link on the top link bar to navigate to a subsite.

3. **Search box**: Enter a search term here to perform the search in the site collection.

4. **User menu**: View options that manage your account or sign out.

5. **Settings button**: Use commands to work with items, lists, and site objects.

6. **Help button**: Search the SharePoint Help files.

7. **Title Link**: Navigate back to the Home page from any SharePoint subsite.

8. **Quick Launch bar**: Navigate between items in the site through the Quick Launch bar.

9. **Web Part**: View and work with items on the page through customizable Web Parts.

10. **Global Navigation Bar**: Access the Newsfeed, OneDrive, and other SharePoint Sites you use.
Understand the SharePoint Program Screen Continued

Lists

Lists store communication items, such as announcements, contacts, calendar events, tasks, and more.

Libraries

Libraries store files such as Office documents, pictures, and forms.

Discussion Boards

Discussion Boards provide a place for people to have an online conversation and store those ideas within their group or community. They’re a good place to compile Frequently Asked Questions.

Newsfeed

The Newsfeed, commonly found on the Global Navigation bar, is new to SharePoint 2013. It’s a social tool that allows coworkers to microblog, connect, and collaborate with each other. It’s also where you access your blog.
Understanding Your Permissions

Anyone who has access to a SharePoint site is assigned to a group. The permission level assigned to that group limits the amount of control the user has in the site. To see the permission levels available on your site...

1. Click the Settings icon on the Home page.
2. Click Site settings.
3. Click Site permissions.
4. This page lists the different groups for this site.
5. Click Permission Levels on the Ribbon.

Here, you see a list of permissions and a description of the type of activities that are allowed for each permission level. The permissions you have are set by your site administrator and can vary between sites and subsites.

### SharePoint Permission Levels

<table>
<thead>
<tr>
<th>Permission Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Full Control</strong></td>
<td>All permissions are included. Users with this permission level have complete control over everything in the site. Site Owners are given this permission level by default.</td>
</tr>
<tr>
<td><strong>Design</strong></td>
<td>Create many things, including lists and document libraries. Also edit pages and change the appearance of the site by applying themes or style sheets.</td>
</tr>
<tr>
<td><strong>Contribute</strong></td>
<td>Add, edit, and delete items in existing lists and document libraries. Site Members are given this permission level by default.</td>
</tr>
<tr>
<td><strong>Read</strong></td>
<td>Read-only access to the Web site. View items and pages, open items and documents. Site Visitors are given this permission level by default.</td>
</tr>
<tr>
<td><strong>Edit</strong></td>
<td>View Lists and Pages and download documents.</td>
</tr>
<tr>
<td><strong>Limited Access</strong></td>
<td>Access only a specific list, item, or document, without being able to access to the entire site.</td>
</tr>
</tbody>
</table>
Using Search

Search Site Content

If you don’t want to find an item by navigating to it, you can search your site’s content to find it.

1. Enter your search keywords into the search box.
2. Click the Search button.

Shortcut: Press Enter.

Your search results appear.

Tip: Preview a result by hovering over an item.

Search within a List or Library

You can also limit your search to a specific list or library.

1. Navigate to the list or library where you want to search.
2. Enter your search term into the search box.
3. Click the Search button.

Shortcut: Enter your search term and press Enter.
Using Help

If you have a question about SharePoint, you can use the Help feature to find an answer. Users at all permission levels can search, but the results are not filtered to meet the specific needs or permission level of a user.

**Browse for Help**

1. Click the Help icon.
2. Select a topic from the featured articles listed.
   
   **Tip:** Scroll down in the window to see a list of more specific topics.
3. Select a topic from the list to narrow your search.
   
   The article jumps to the topic you specified.

**Search for Help**

If you have a specific help topic in mind, you can save time by using the search box.

1. Enter your topic in the Search box.
2. Click the Search icon.
   
   **Shortcut:** Enter your search term and press Enter.
3. Select the topic that best relates to your question.
   
   Help displays information regarding your selected topic.
Using the Recycle Bin

Delete an Item

Just like a garbage can stores trash, the Recycle Bin stores all of the items you have deleted. You can delete files, lists, and objects, and they will be moved to the Recycle Bin for a set period of time before being permanently deleted.

1. Hover over the item you want to delete and click the Open Menu button (...).

Tip: The Open Menu button is the one that looks like an ellipsis (...).

2. Click the Settings link.

3. Click Delete this ... (List/Library/document).

A dialog box appears to ask if you’re sure you want to delete the item.

4. Click OK.

Tip: Site administrators schedule how often a site's Recycle Bin is emptied. Contact your SharePoint site administrator to confirm how often objects in the Recycle Bin are permanently deleted.
Using the Recycle Bin Continued

Restore or Permanently Delete an Item

If you've deleted an item and find that deleting it was a mistake, you can retrieve it from the Recycle Bin. You can also permanently delete an item if you know you’ll never want to see it again.

1. On the Site Contents page, click the Recycle Bin.

   Tip: The Recycle Bin shows only items that you’ve deleted unless you are a site collection administrator.

2. Select the checkbox next to the item you want to restore or delete.

3. Click Restore Selection to move the item out of the recycle bin or Delete Selection to permanently delete it.

   Tip: When you delete a file, all versions of the file are also deleted. When you delete a library, all files in the library are deleted.

4. Click OK.

   If you restored an item it is returned to its original location, otherwise the deleted item is permanently removed.
The Fundamentals Quiz

1. What is SharePoint?
   A. A hub for sharing and storing information and working together within an organization
   B. A program that lets you create forms to share with others in your organization
   C. A hub for phone message services in an organization
   D. An e-mail application

2. You must be given permission to access a SharePoint site. (True or False?)

3. Which of these is NOT part of a SharePoint site screen?
   A. Top Link bar
   B. Navigation Pane
   C. The Ribbon
   D. Help button

4. Which link would you select to directly post to your Blog:
   A. Sites
   B. Newsfeed
   C. OneDrive

5. What is the difference between permission levels and groups?
   A. There is no difference; they are the same thing
   B. Permission levels can be changed, while groups cannot be changed
   C. There are more default groups than permission levels
   D. Users are assigned to groups, and groups are granted a certain permission level by the site administrator

6. Searches are confined to the contents of the current site. (True or False?)

7. Help automatically filters help inquiries according to a user’s permission level on a given site. (True or False?)

8. Objects in the Recycle Bin are never permanently deleted. (True or False?)
Quiz Answers

1. A. SharePoint is a hub for sharing and storing information and working together in an organization.

2. True. In order to access a SharePoint site you must be given permission by the individual(s) managing the site.

3. B. There is no Navigation Pane in SharePoint.

4. B. Newsfeed. You can access your Blog from your Sites page, but Newsfeed is the most direct way to access your Blog.

5. D. Users are assigned to groups, and groups are granted a certain permission level by the site administrator.

6. True. Previous versions of SharePoint did have a Search Scope control which allows users specify search locations, SharePoint 2013 search function however does not have this function.

7. False. Help topics include topics for site administrators and site visitors. Search results are not filtered to meet the specific needs of a user.

8. D. False. Objects are stored for a set period of time. After that they are permanently deleted.

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