SharePoint Modern Experience: Site Owner

Days: 2

Description:

Day 1: Microsoft® SharePoint® is a platform designed to facilitate collaboration and allow people to use familiar applications and web-based tools to create, access, store, and track documents and data in a central location. As such, SharePoint has many distinct features that must be enabled and configured, and many content structures that can be selected, added, and configured. In this course, you will learn how to create, configure, and manage SharePoint sites so that your team or organization can share information and collaborate effectively.

SharePoint content structures and configuration options are complex. Site owners must understand what features, options, and content structures are available in SharePoint, and how to properly configure them. With SharePoint sites, features, and content structures properly implemented, users will be able to securely share files, collaborate on documents, and access information they need to work with their colleagues more effectively.

Day 2: Microsoft® SharePoint® Online and SharePoint 2019 helps people collaborate and use familiar applications and web-based tools to create, access, store, and track documents and data in a central location. SharePoint can also help organizations segment digital information, share information from external sources, archive records, and create rich websites quickly and easily. In this course, you will learn how to create, configure, and manage a SharePoint site so that your team or organization can collaborate effectively, manage the flow of digital information, meet governance and compliance needs, and create rich websites for your organization's needs.

SharePoint features are robust and complex. Site owners can determine what features and options to make available in SharePoint, and how to configure those features to meet organizational and user needs. By properly implementing these features, users will be able to collaborate effectively, and organizations will save time and money through automation of business processes, fast and efficient retrieval of information, and effective records management.

Audience: This course is designed for existing Microsoft SharePoint site users who will create and manage SharePoint team or communication sites in SharePoint Online or SharePoint 2019.

Course Objectives:

Day 1: In this course, you will create a SharePoint team site and a communication site, perform basic content management tasks on SharePoint sites, and configure workflows with Forms and Flow.

You will:

- Create and configure new SharePoint sites.
- Create and configure document libraries.
- Create and configure lists.
- Assign permissions and access rights.
- Create and configure a communication site.
- Implement workflows with Forms and Flow.

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Day 2: In this course, you will implement and manage advanced SharePoint Site features based on business requirements.

You will:

- Configure site settings.
- Integrate external data and apps.
- Configure custom content types, columns, and document sets.
- Manage information governance and compliance.
- Design and create a SharePoint site for an event.

OUTLINE:

Day 1:

LESSON 1: CREATING AND CONFIGURING A NEW SITE
- Topic A: Create a Site in SharePoint
- Topic B: Configure Site Look and Layout

LESSON 2: CREATING AND CONFIGURING DOCUMENT LIBRARIES
- Topic A: Create Document Libraries
- Topic B: Configure File Versioning and Checkout
- Topic C: Configure Content Approval

LESSON 3: CREATING AND CONFIGURING LISTS
- Topic A: Add List Apps to a Site
- Topic B: Create Custom Lists
- Topic C: Create Calculated and Validated Columns

LESSON 4: ASSIGNING PERMISSIONS AND ACCESS RIGHTS
- Topic A: Secure Sites with Permissions
- Topic B: Secure Apps, Documents, and Files

LESSON 5: CREATING AND CONFIGURING A COMMUNICATION SITE
- Topic A: Create a Communication Site
- Topic B: Configure a Communication Site

LESSON 6: IMPLEMENTING WORKFLOWS WITH FORMS AND FLOW
- Topic A: Capture Data with Forms
- Topic B: Store Form Data in SharePoint with Flow
- Topic C: Automate Business Processes with Forms, Flow, and SharePoint

Day 2:

LESSON 1: CONFIGURING SITE SETTINGS
- Topic A: Configure SharePoint Site Settings
- Topic B: Configure Navigation in SharePoint
- Topic C: Plan and Implement SharePoint Hub Sites

LESSON 2: INTEGRATING EXTERNAL DATA AND APPS
- Topic A: Integrate Outlook with SharePoint
- Topic B: Integrate Other Microsoft Apps with SharePoint
- Topic C: Integrate Third-Party Apps and Services with SharePoint

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LESSON 3: CONFIGURING CUSTOM CONTENT TYPES, COLUMNS, AND DOCUMENT SETS

- Topic A: Create a Custom Content Type
- Topic B: Add Columns to Content Types
- Topic C: Create and Configure Document Sets

LESSON 4: MANAGING INFORMATION GOVERNANCE AND COMPLIANCE

- Topic A: Configure Auditing in SharePoint
- Topic B: Activate and Configure Information Management Policies
- Topic C: Configure Retention Labels and Records Management
- Topic D: Manage Files with the Content Organizer

LESSON 5: DESIGNING AND CREATING A SHAREPOINT EVENT SITE

- Topic A: Design a SharePoint Site for an Event
- Topic B: Create a SharePoint Site for an Event