

MICROSOFT 365 SHAREPOINT INTRODUCTION

This course has been developed for SharePoint Site Owners using Microsoft 365 who are required to create and maintain content on a team site.



Prerequisites

Participants should be familiar with navigating a SharePoint site including adding and editing documents and list items.

Expected outcomes

- Create a team site and add and customise pages
- Create and maintain document libraries including version control.
- Work with a variety of lists and associated views.
- Control access to the site by assigning user permissions
- Customise the site navigation
- Build simple automation using Power Automate (Flow)

Who should attend

This course is recommended for SharePoint site owners looking to extend their knowledge of:

- SharePoint Online (as part of Microsoft 365).

Introduction to SharePoint Online

- Understanding Sites and Microsoft 365 Groups
- Navigating a SharePoint Online site

Setting up a new team site

- Site contents
- Changing site appearance
- Change site regional settings & Time zone
- Connecting your site to Microsoft Teams

Creating and managing pages

- Create a news post page
- Create a site page
- Publish a page
- Editing page content
- Add and edit web parts on pages
- Deleting pages

Working with libraries

- Creating a new library
- Adding files to the library
- Delete a document from a library
- Create files directly in a library
- Open files in Microsoft 365 desktop or online
- Setting document properties
- Multiple document editors
- Check in / Check out
- Version history

The recycle bin

- Restoring items
- Permanently deleting items
- The second stage recycle bin

Working with lists

- Create a list from a template
- Create a list from a classic App
- Custom list – import a list from a spreadsheet
- Modify list settings
- Calculated field
- Create a list with a Calendar
- Manage list settings

Working with views

- Modify a default view
- Create a new view from a filter
- Create a view in classic experience
- Create a view in a library
- Modifying an existing view via library settings
- Changing the default view
- Deleting a view
- Create a gallery view
- Create a board view

Customising navigation

- Adding site content to the quick launch via list/library settings
- Adding manual links to the quick launch
- Create collapsible heading links

Permissions

- Manage your site permissions
- Share access to a library
- Share a single file
- Create a subsite
- Apply a Site Template

Create a Communication site

- Understand differences between Team and Communication Sites
- Create the communication Site
- Adding members to a communication site
- Scheduling the publishing of a page
- Deleting a Site

Alerts and rules

- Subscribing to an alert for a list/library
- Subscribing to an alert for a document/item
- Change alert settings
- Cancel an alert
- Set up an alert for all users
- Using rules

Power Automate (Flow)

- Create a manual flow using a built-in template
- Create a flow that is triggered to send a reminder email
- Create a flow to notify an issue has been assigned
- Creating a more complex flow from an existing template