

SharePoint Online/Office 365 Training

Power User / Fundamentals

Intended for: Power User / Site Administrator / Forms and Workflows Designers

Prerequisites: None

OVERVIEW

The SharePoint Power User Fundamentals class presents all the essential SharePoint features, information organization decision points, and custom forms and workflows design. 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 SharePoint Online features in Teams and Groups
- Use newsfeed to follow colleagues' activities, and share expertise through user profile
- Create a site collection mapped to organizational structure from start to finish

Improve business processes with forms and workflows

- Create flows from a template or from scratch using various connections and triggers
- Create approval, notification, recurrence, and button flows
- Customize a SharePoint list form using PowerApps with different views
- Design PowerApps from scratch mapped to SharePoint lists and libraries to collect information

1. Definitions, History, and Expectations

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

2. Sites Organization

- Content Creation and Organization
 - Site collection
 - Site
 - Top link bar
- App launcher: SharePoint homepage
- Classic vs Modern Navigation / Interface
 - Team Sites
 - Communication Sites
 - Hub Sites
- Site navigation
 - Quick launch bar
 - Site contents
- Site Templates
 - Features
 - Site template comparison

3. List

- Columns
- Filters
- Views
- Form configuration
- Versions
- Alerts
- Large lists: metadata navigation and indexed columns
- Search

4. Documents

- Columns, views, managed metadata

- Get a link functionality
- Co-authoring and track changes
- Syncing using OneDrive for Business
- Versions
 - When are version created
 - Check out - check in
 - Major, minor, and approval
- Folders vs. metadata
- Search and Delve

5. Pages, Web Parts, Apps

- Classic and modern pages
- Types of pages: Wiki, Standard, Modern, Application
- Web Parts
- Apps
- What's not supported in modern pages

6. Office 365 Groups

- Navigation
- Group members and settings
- Conversations
- Calendar
- Group library
- Planner

7. MS Teams

- Chat
- Organize conversations with Channels and Tabs
- Permissions / External Guests
- Online Meetings
- Documents with Office & SharePoint
- Sync with OneDrive
- Integrations
 - Connectors / Apps
 - Bots

8. OneDrive

- Personal documents and site
- User profile

9. Personal and social features

- User Profiles
- MyAnalytics
- Yammer

10. Classic Tasks and Calendars

- Tasks
- Organize for project management
 - Indents
 - Timeline
- Calendars
 - Connect to Outlook
 - Overlays in SharePoint

11. Security

- Authentication vs. authorization
- Permission levels
- Site collection administrator
- SharePoint groups
- Sharing - Get a link functionality
- Members groups security
- External users

12. Templates and Publishing Infrastructure

- Site and list templates
- Publishing infrastructure and limitations in the modern interface

13. Project: Libraries and Lists

- Research documents
 - Document library with metadata
 - Permissions by folder
 - Views without folders
 - Metadata creation and navigation
- Project site management
 - Project directory
 - Project site template
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14. Microsoft Flow Basics

- Templates and connectors
- Events, actions, conditions, dynamic content
- Create a flow from a template and from scratch
- Run and check Flow activity
- Demo: Document Approval
- Demo: Training/class sign up
- Demo: Flow buttons
- Demo: Recurrence, send monthly email

15. Workflow Administration

- Create and manage environments
- Security
- Data locality
- Data loss prevention policy

16. Microsoft Flow Custom Services

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

17. Workflow deployment

- Move
- List template
- Update

18. PowerApps

- Create an app from SharePoint
 - Customize SharePoint List Form
 - Chase size orientation
 - Format text
 - Add Rules
 - Create Additional views – create, show, or edit

- Add multimedia
- Create an app from scratch
- Form Design
 - Visual Layout
 - Screens
 - Data connections
 - Logic and rules
 - Validation
 - External data