# Microsoft SharePoint Online For Site Owners Masterclass Training

Duration: **5 Day**

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## Overview

The goal of this course is to take you from Zero to Hero and provide you with the knowledge required both as an end user and as a site administrator or owner of Microsoft SharePoint sites to understand, use, create, configure and manage SharePoint Sites in Office 365/Microsoft 365.

Note – If you are a 'back end' SharePoint Administrator looking for training on the SharePoint Admin Center, you should attend the following course:

Mastering SharePoint Online Design, Architecture and Best Practice Administration – QAASPOE

This course is a combination of the following two courses:

- QASPEUOL1 – Mastering SharePoint Fundamentals
- QASPOSA – Mastering SharePoint Online Site Administration

The course emphasises hands-on experience, with a series of self-guided exercises integrated into the training.

**Day 1**

The first day is designed for users who are new or have basic skills with SharePoint and want to understand SharePoint and be able to use SharePoint.

You will discover and understand:

- What SharePoint is and how it fits into Microsoft Teams and Microsoft 365
- Key benefits of SharePoint
- What is a SharePoint Site and what are is the difference between a Team Site and Communication Site
- SharePoint Document Libraries and Microsoft Lists
- SharePoint Document features including versioning, metadata and co-authoring
- SharePoint Pages, News, Events, Spaces
- Extended SharePoint functionality via apps
- SharePoint permissions and sharing with people inside and outside the organisation
- Microsoft Search to discover information within SharePoint and across Microsoft 365

**Day 2-5**

The next 4 days of this course take you from being a user of a SharePoint Site to being a Site Owner/Site Administrator

You will understand and learn how to create, configure and manage:

- What are SharePoint Site Administrators' roles and responsibilities
- SharePoint Evergreen model and how to keep up to date with changes
- SharePoint Site Use cases and templates
- SharePoint Administrators vs Site Administrators vs Site Owners
- Top-Level Site vs Subsite Administration
- Creating Sites and Site Designs
- Creating, configuring and managing Site Pages
- Understanding Lists vs Libraries

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- Creating, configuring and managing Site Lists
- Creating, configuring and managing Site Libraries
- Creating, configuring and managing metadata
  - Site Columns
  - Content Types
  - Managed Metadata
- Document Sets
- Document ID aka Durable links
- Creating, configuring and managing Site News
- Creating, configuring and managing Site Events
- Creating, configuring and managing Site Spaces
- Creating, configuring and managing Site Navigation
  - Site Navigation
  - Home Sites and Global App Bar
- Targeting Content and Navigation using Audiences
- Understanding Creating, configuring and managing Hub Sites
- Understanding and configuring Site Permissions
- Understanding and configuring External Sharing
- Creating, configuring and managing Site Libraries
- Extending SharePoint Site Functionality using Apps and Features
- Understanding and configuring Site Settings

## Prerequisites

- A basic understanding of Windows 10 or higher.
- Experience using Microsoft Edge or equivalent browser.
- Fundamental experience with Office 365/Microsoft 365 is recommended, including Logging in and navigation around Office 365/Microsoft 365.
- A basic knowledge of Office applications (Word, Excel, Outlook).

Dual monitor setup is required when attending this course via the QA Attend from Anywhere or Virtual Classroom delivery methods.

Before you book, check that you meet the Cisco WebEx system requirements and run a test meeting to ensure the software is compatible with your firewall settings and ensure that you have passed all pre-course tests. If you have any questions, contact our Virtual team. Learn more about our Virtual Classrooms.

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## What You Will Learn

Day 1 **y**ou will:

- What SharePoint is and how it fits into Microsoft Teams and Microsoft 365
- Key benefits of SharePoint
- What is a SharePoint Site and what are is the difference between a Team Site and Communication Site
- SharePoint Document Libraries and Microsoft Lists
- SharePoint Document features including versioning, metadata and co-authoring
- SharePoint Pages, News, Events, Spaces
- Extended SharePoint functionality via apps
- SharePoint permissions and sharing with people inside and outside the organisation
- Microsoft Search to discover information within SharePoint and across Microsoft 365

On days 2-5 you will understand and learn how to create, configure and manage:

- What are SharePoint Site Administrators' roles and responsibilities
- SharePoint Evergreen model and how to keep up to date with changes
- SharePoint Site Use cases and templates
- SharePoint Administrators vs Site Administrators vs Site Owners
- Top-Level Site vs Subsite Administration
- Creating Sites and Site Designs
- Creating, configuring and managing Site Pages
- Understanding Lists vs Libraries
- Creating, configuring and managing Site Lists
- Creating, configuring and managing Site Libraries
- Creating, configuring and managing metadata
  - Site Columns
  - Content Types
  - Managed Metadata
- Document Sets
- Document ID aka Durable links
- Creating, configuring and managing Site News
- Creating, configuring and managing Site Events
- Creating, configuring and managing Site Spaces
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  - Home Sites and Global App Bar
- Targeting Content and Navigation using Audiences
- Understanding Creating, configuring and managing Hub Sites
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- Understanding and configuring External Sharing
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- Extending SharePoint Site Functionality using Apps and Features
- Understanding and configuring Site Settings

## Outline

Please note that due to the dynamic nature of Office 365/Microsoft 365 some content may change

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without notice

**Day 1**

Module 1: What is SharePoint?

- Understanding Office 365 – Optional
- Office 365 vs Microsoft 365
- SharePoint Start Page
- SharePoint Myths and Misunderstandings
- Isn't SharePoint just a part of Microsoft Teams?
- Key Benefits of SharePoint
- SharePoint – continual updates

Module 2: Understanding SharePoint Sites

- SharePoint Sites Overview
- SharePoint Site Branding
- Understanding SharePoint Site Types
- SharePoint Team Sites
- Understanding Microsoft 365 Groups
- SharePoint Communication Sites

Module 3: Understanding SharePoint Site Components

- Understanding SharePoint Pages
- Understanding Site Navigation
- Understanding SharePoint Spaces
- Understanding SharePoint Site Contents
- Understanding Site Functionality

Module 4: SharePoint Security – Because Sharing is Caring

- Sharing Communication Sites
- Sharing Team Sites
- Sharing Folders and Files

Module 5: Where's my Stuff? Finding Things in SharePoint

- Microsoft Search Predictive Results
- Search Results Page Features
- Bing Integration
- Advanced Searches – KQL

Module 6: SharePoint Site Settings

**Day 2-5**

Module 1: Introduction to SharePoint Administration

- SharePoint Site Administration
- How to keep up to date with changes?
- What's new in SharePoint
- SharePoint Intrazone

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- SharePoint Pitstop - Monthly
- SharePoint Community Site
- Microsoft 365 RoadMap
- SharePoint Use Cases
- Site Templates

Module 2: Site Administration

- SharePoint Administrators vs Site Administrators vs Site Owners
- Top-Level Site vs Subsite Administration
- Creating a Site (Top-Level)
- Creating a Team Site
- Creating a Communication Site
- Site Designs
- Creating a Subsite

Module 3: Site Pages

- Creating and Managing Site Pages
- Adding a page
- Page Sections
- SharePoint Page Web Parts
- Page Editing
- HTML Field Security
- Modern Page Publishing
- Page Scheduling
- Promoting a page
- Page Comments
- Page Branding/Themes
- Site/Page Header Options
- Site/Page Footer Options
- Page Analytics
- SharePoint Page performance
- SharePoint Intranet Resources and Best Practices

Module 4: Lists and Libraries

- SharePoint Site Content
- SharePoint Lists
- SharePoint Document Libraries
- Lists and Library Confusion
- Creating and Managing Lists
- When should I use a SharePoint List?
- SharePoint Site Administrator List Tasks
- Creating Lists
- Customizing Lists
- Creating/Editing/Deleting Columns (Metadata)
- Planning Columns/Metadata
- The Goldilocks formula for columns/metadata
- Column Validation
- Editing and deleting columns
- Column Conditional Formatting
- SharePoint List Views

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- Creating/Editing/Deleting List Views
- Configuring List Forms
- Microsoft Lists Rules
- Microsoft Lists Alerts
- Microsoft Lists Settings
- Microsoft Lists Versioning
- Microsoft Lists Advanced Settingso
- Microsoft Lists Ratings
- Deleting/Restoring Lists and List Items
- Microsoft Lists Resources
- SharePoint Document Libraries
- SharePoint Site Administrator Document Library Tasks
- Creating Document Libraries
- Customizing Libraries
- Configuring Library Settings
- Deleting/Restoring Documents and Document Libraries
- Site Columns

Module 5: Content Types

- Site Content Types
- Creating Content Types
- Gotcha - Enabling Site Level Content Types
- Adding Site Content Types
- Changing Existing List/Document Content Types
- Content Type gotcha
- Document Library File Template Management

Module 6: Document Sets

- Document Sets
- Enable the Document Set Feature
- Adding a Document Set Content Type to a library
- Document Set Settings
- Document Set Content Types
- Document IDs, AKA Durable Links
- Ways to View and Utilize Document IDs

Module 7: Metadata and Folders

- SharePoint Managed Metadata
- Term Groups Term Sets and Terms
- Term Store Groups and Permissions
- Term Synonyms and Language Translations
- Using Managed Metadata
- Folders vs. Metadata
- Folders
- Metadata
- Using Folders and Metadata Together

Module 8: News and Events

- News Posts

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- Creating News Posts
- Creating News Posts
- Creating News posts
- Edit a News Post
- Removing a News Post
- News Web Part
- News Digests
- Events

Module 9: SharePoint Spaces

- Understanding SharePoint Spaces
- Creating, configuring and managing SharePoint Spaces

Module 10: Navigation in SharePoint

- SharePoint Site Navigation
- Team Site Navigation
- Communication Site Navigation
- Web Part Navigation Options
- SharePoint App Bar and Global Navigation
- Customization of App Bar Global Navigation
- Site Navigation Updates and Documentation
- Audience Targeting
- Targeting Events
- Targeting News
- Targeting Navigation Links
- Targeting Documents

Module 11: Administering Hub Sites

- Hub Sites
- Hub Site Benefits
- Configuring Hub Sites
- Associating Sites to a Hub Site
- Hub Site Approval Flow (Power Automate)
- Hub Site Permissions Sync
- Hub Site Limitations

Module 12: SharePoint Security

- SharePoint Security
- SharePoint Site Permissions vs Microsoft 365 Group Security
- SharePoint Modern Team Sites and Microsoft 265 Groups
- Microsoft 365 Security Model
- Microsoft 365 Group access vs SharePoint Site Sharing
- SharePoint Site Access Requests
- SharePoint Site Security Components
- Permission levels
- SharePoint Groups
- Default SharePoint Groups
- Custom SharePoint Groups
- SharePoint Group Best Practice

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- Permission Inheritance
- Breaking Inheritance
- Checking Permissions
- Applying SharePoint Security
- SharePoint Site (Collection) Administrators Permissions
- Granting Permissions
- Site Permissions
- Sharing SharePoint Components
- Sharing a Site
- Sharing a Document Library/List
- Outlook External Sharing Link Features
- Folder and Item Advanced Permissions
- Item level QR Codes
- Modifying and Removing Permissions
- SharePoint Permissions Best Practice
- SharePoint External Sharing
- Authenticated External User sharing
- Authenticated External User Site Management
- Authenticated External User Link Management
- SharePoint External Sharing Alerts, Auditing, and Reporting
- SharePoint Guest Expiration (Spoiler alert– nothing to do with Guests)

Module 13: Customising SharePoint using Apps and Features

- SharePoint Apps
- SharePoint Store
- App Requests and Approval
- SharePoint App Licensing
- SharePoint App Licensing – Classic App ‘gotcha’
- SharePoint Features

Module 14: Site Settings

- Site Settings
- Communication vs Team Sites Site Settings
- Site Settings Gotcha
- Regional Settings
- Language Settings
- User Alerts
- Storage Metrics
- Microsoft Search settings