



Microsoft 365 and SharePoint Online: Administer & Configure for the Cloud

Course ISI-1505B 4 Days Instructor-led, Hands on

Course Description

Microsoft 365 is an integrated suite that provides intelligent tools for managing everyday organizational tasks like content management, communication, creating reports, and automating business processes.

In this four-day instructor led course, you will get familiar with popular apps from Microsoft 365, with a focus on enabling workspace collaboration and productivity using Microsoft SharePoint Online, OneDrive, and the Power Platform to name a few. This course will provide students with a complete guide to SharePoint Online deployment and administration considerations for your organization.

Microsoft 365 and SharePoint Online are ever-changing platforms with frequent updates. This course covers the Microsoft 365 suite in general and SharePoint Online specifically. The focus is on the capabilities of SharePoint online, administration and governance.

The course is targeted at end users, business stakeholders, IT administrators, developers, and architects that plan to use Microsoft 365 and SharePoint Online. Solving the core problems of governance, risk, compliance, taxonomies, processes, and training associated with a SharePoint Online deployment is the macro focus of this course and is the core of good SharePoint administration.

Course Objectives

In this course, you will learn about:

Microsoft 365

- SharePoint Online capabilities and features
- SharePoint Online administration
- Manage user profiles
- Managing a term store
- Records management
- Configuring search
- Working with apps
- Site-collection administration

Prerequisites

Basic knowledge of SharePoint: Site Collections, Sites, Lists, Document Libraries, Site Columns, Content Types

Contact ISInc for more information at 916.920.1700 or by visiting our website at <http://www.isinc.com>

Course Outline

Module 1: Overview of Microsoft 365

- The infrastructure business is changing!
- The evolution of Microsoft 365
- What is Microsoft 365?
- Licensing
- Microsoft 365 Apps
- Signing in to Microsoft 365
- Microsoft 365 user interface
- Microsoft 365 admin interface
- Microsoft 365 admin roles

Module 2: Introduction to SharePoint Online

- An overview of the SharePoint Admin Center
- Finding the SharePoint Admin Center in Microsoft 365
- A brief walkthrough of the SharePoint Admin Center interface
- Managing site collections
- Getting to the SharePoint start page
- Creating a modern site
- Viewing site contents
- Creating a list
- Adding an item to a list
- Creating a document library
- Uploading documents to a library
- Sharing a document
- Searching content

Module 3: Working with Modern Sites in SharePoint Online

- Changing the look
- Adding a page
- Adding a web part
- Adding an app
- Modifying the top navigation
- Modifying the left navigation
- Viewing and changing site settings
- Determining and revoking permissions in a site

Module 4: Working with Lists and Libraries in SharePoint Online

- Creating a list using a built-in list template
- Adding a column

- Creating a custom list view
- Using Quick Edit to bulk-edit list items
- Viewing and changing list settings
- Viewing and changing list permissions
- Adding alerts

Module 5: Document Management in SharePoint Online

- Creating a new document
- Associating a document template
- Viewing and editing documents in the browser
- Viewing and editing documents in the client
- Downloading documents
- Moving and copying documents
- Viewing and changing document library settings
- Versioning settings, content approval, and document checkout

Module 6: Term Store and Content types in SharePoint Online

- Creating a new group for term sets
- Creating term sets and terms
- Creating a Managed Metadata site column
- Creating a content type and adding columns to it
- Adding a content type to a list or library
- Tagging a document

Module 7: OneDrive for Business

- Uploading a file to OneDrive for Business
- Syncing files and folders
- Sharing a file

Module 8: Microsoft 365 Groups

- Creating a group
- Deleting a group
- Joining a group
- Leaving a group
- Adding members to a group
- Removing members from a group

Module 9: Power Automate (Microsoft Flow)

- Creating a flow using a template
- Editing a flow
- Exporting a flow
- Importing a flow

- Adding owners
- Testing your flow
- Creating a solution
- Creating a flow in a SharePoint library

Module 10: Power Apps

- Creating a template-based app
- Connecting to data sources
- Adding screens
- Creating a canvas app for a blank template
- Creating Power Apps from a SharePoint list/library
- Sharing Power Apps

Module 11: Custom Development - SharePoint Framework

- Technical requirements
- Setting up the development environment
- Building your first SPFx web part
- Deploying your SPFx web part to an Microsoft 365 tenant
- Debugging your SPFx web part

Module 12: Managing user profiles

- Introduction to user profiles, audiences, and My Sites
- People
- Manage user properties
- Manage subtypes
- Manage audiences
- Manage user profile permissions
- Manage policies
- Organizations
- My Site settings
- My Site setup
- Configure trusted-sites locations
- Map an account through different membership providers
- Manage promoted sites
- Publish links to Office client applications

Module 13: Working with Business Connectivity Services

- The benefits of using Business Connectivity Services
- Searching external data in SharePoint Online
- What is an administrator's role with Business Connectivity Services?
- Connecting to OData
- Authentication

- Configuring Secure Store
- Authorization

Module 14: Records management

- In-Place Records Management Record declaration settings
- Automatic declaration
- Creating and managing records in the records center
- Creating a records center
- Create and syndicate content types
- Automatic records declaration
- Configure the Send To link
- Content Organizer
- Routing the document
- Using workflows to move the document
- Managing the records center
- Document IDs

Module 15: Site-collection administration

- Governance honeycomb
- User-adoption principles Relative advantage
- Compatibility
- Complexity
- Trialability
- Observability
- User-adoption groups
- Innovators: Venturesome
- Early Adopters: Respect
- Early Majority: Deliberate
- Late Majority: Skeptical
- Laggards: Traditional
- Other notes on adoption
- Feature discussions
- Shared administrative configurations
- The connection between managed properties and Query Builder
- The connection between the query rule builder and the term store
- The connection between the global and local term stores
- Division of roles and responsibilities