Managing a Sharepoint site on Microsoft 365

Duration: 2 days
Audience: Pour tous

Who is this training for?

Any manager or anyone who regularly works in a team who wants to set up effective work, collaboration and sharing processes.

Training objectives

- Discover a set of methods and techniques in SharePoint to better organize and manage documents.
- Distinguish a team site from a communication site.

Summary

Are you looking for simple, effective and concrete techniques to increase efficiency in the management of your documents in SharePoint? This training will allow you to learn how to build SharePoint sites to manage your documents efficiently. In addition to discovering the essentials to put in place to develop a practical and effective SharePoint site, you will learn the common mistakes to avoid. Our approach is designed to teach you how to use SharePoint to its full potential without coding. We offer you simple and proven methods to help you improve the efficiency, mobility, collaboration, and corporate memory of your teams.

Course outline

- The structure of classic versus modern sitesCreating sites and subsites
- The relationship between SharePoint and Microsoft Teams
- Creating an effective basic collaborative structure integrating SharePoint and Teams
- The most important Microsoft 365 elements for a successful team site
- The essential steps to successfully implement a team site
- Creating and customizing lists in SharePoint
- Benefits of list views (sorting filters, groups)

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- Columns, Fields, and FormsColumns, Fields, and Forms
- Create and Customize LibrariesAdd Folders and Files Access Version HistoryManage Library Views
- Understand Document Management How to Use Metadata and ColumnsDrillthrough Management (When, Why, and How)Site Columns, and Document Sets
- Tips and Tricks for Effectively Manipulating Documents
- Creating Lists in SharePoint with the Microsoft List app
- Use lists in a team site, add lists to the Teams team, organize data into columns, edit list views
- Use and manage alerts
- Organize site navigation
- Create and customize modern site pages : manage and use Web Parts, understand news pages, integrate content from other Microsoft 365 apps
- Manage access in Teams sites versus in communication sites
- The synergy between Microsoft 365, SharePoint and Microsoft 365 : connect your data in Excel, save and manage documents from SharePoint (Excel, PowerPoint, Word) in the Microsoft 365 desktop app
- SharePoint site hubs: associate a team site with a hub, use content from the hub in your team site

Approach and methodology

- Lectures
- Demonstrations
- Guided and individual exercises

Prerequisites

Optimize the Sharepoint team site connected to Teams or equivalent content.

Recommendations

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Knowledge of the Microsoft 365 cloud environment (including OneDrive and Teams) is highly recommended.

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