



Microsoft SharePoint

Online Version with Office 365

Level 1: Site User

1 Day Course
Training at Your Office

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COURSE DESCRIPTION

In this course, you will learn about and use a SharePoint Team Site to access, store, and share information and documents. SharePoint is a complex platform with many features and capabilities. A strong understanding of those features and capabilities will allow you to work more efficiently and effectively with SharePoint, and with the documents and data stored in SharePoint.

COURSE TOPICS

Overview

- What is SharePoint?
- SharePoint Online vs On-Premises
- SharePoint Site Types
- Public vs Private Access
- Membership Types
- Access Rights
- Office 365 Groups
- Modern vs. Classic Experience
- Office 365
 - Navigating Apps
 - Your Account
 - Word Online vs Desktop
 - Excel Online vs Desktop
 - PowerPoint Online vs Desktop
 - Outlook Online vs Desktop
 - OneDrive vs Team Sites

Navigating Sites

- Using a SharePoint Site
- The Search Box
- Using Refresh
- Using a Site for the First Time
- Open/Close a Site
- Follow a Site
- Site Navigation Using Quick Launch
- The Home Page
- Group Membership & Site Permissions

Using Team Sites Components

- Adding News
- Adding New Links
- Using Conversations
- The OneNote Notebook
- Using Pages
- Site Contents
- The Recycle Bin
- Editing Quick Launch
- Using Subsites

Lists

- Using Lists
 - Tasks
 - Contacts
 - Announcements
 - Calendar
- List Settings
- Using Modern and Classic Views
- Adding List Items
- Editing/Deleting List Items

Libraries

- Using the Default Documents Library
- The Menu Bar
- Creating and Using Folders
- Selecting Documents
- Uploading Documents
- Creating New Documents
- Deleting Documents
- Editing Documents
 - Using Live Co-authoring
 - Using Document Check-out
- Previewing Documents
- Using Versioning
- Adding Columns, Sorting and Filtering
- Creating Basic Views
- Creating Alerts
- Granting Access
- Sharing
- What is Document Approval
- A Quick look at Creating a Document Library



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Level 2: Site Owner

1 Day Course
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COURSE DESCRIPTION

Once you have learned how to navigate and use a SharePoint Team Site, you may want to know how to setup a site and configure it for use by your team. In this course we look at what you can do as an Owner of a SharePoint Team Site.

COURSE TOPICS

Creating New Sites

- Creating a Team Site
- Communication and Hub sites
- Site Collections
- Creating Subsites
- Deleting Sites

Customizing a Site/Site Collection

- Customizing the Look of the Site
- Understanding Site Settings
- Site Access Requests
- The Second Stage Recycle Bin

Adding and Configuring Libraries

- Create Picture Libraries
- Create Document Libraries
- Create Wiki Page Libraries
- Create Form Libraries
- Library Settings
- Library Permissions

Modifying Document Libraries

- Formatting with Code and Formulas
- Creating Custom Columns
- Indexing Columns
- Advanced Custom Views
- Configure a Content Approval Process

Adding and Configuring Lists

- Tasks
- Links
- Announcements
- Contacts
- Calendar
- Custom Lists
- Other Lists
- Add Apps from the Store

Assigning Permissions and Access Rights

- Users and Groups
- Default Permission Levels
- Add Permission Levels
- Set Permissions for:
 - The Entire Site
 - Specific Libraries or Lists
 - Specific Items
 - Subsites



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Level 3: Advanced Site Owner

1 Day Course
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COURSE DESCRIPTION

SharePoint features are robust and complex. Site owners can determine what features and options to make available in SharePoint, and how to configure those features to meet organizational and user needs. By properly implementing these features, users will be able to collaborate effectively, and organizations will save time and money through automation of business processes, fast and efficient retrieval of information, and effective records management.

Upon successful completion of this course, existing SharePoint site owners will be able to take on administrative responsibility for implementing and managing advanced features based on business requirements. You will:

- Configure site settings.
- Integrate external applications and data.
- Configure site metadata.
- Manage archiving and compliance.
- Implement workflows.

COURSE TOPICS

Configuring Site Settings

Configure Site Administration Settings
Configure Site Search
Organize the Site and Configure Navigation
Site Pages
Configure Site Auditing

Integrating External Applications and Data

Create a Flow for a Library

Configuring Site Metadata

Create a Custom Content Type
Add Site Columns to Content Types
Create and Configure Document Sets

Managing Archiving and Compliance

Create a Policy
Manage Site Closure and Deletion
Configure In-place Records Management
Manage Records Using the Records Center
Manage Content with the Content Organizer
Configure Information Management Policies

Implementing Workflows

Plan a Workflow
Create and Publish a Workflow
Test Workflows
Design and Implement Advanced Workflows
Branching and Loops



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