

SPT-301

Create a Team Site with SharePoint Online



Objectives

With this training, participants will be able to:

- Create a useful and well-organized team site to facilitate online collaborative work and sharing of team or project information
- Effectively manage access rights for sites under their responsibility using Microsoft 365 groups

Practical information

Duration	6 hours
Level	Advanced
Number of participants	8 participants
Languages available	English - French

Prerequisites

Completion of the DRI-101 training or a good SharePoint user experience

Target audience

Managers and Administrative Staff

Content

1 - What is a SharePoint site (if required)

- Introduction to SharePoint sites
- Types of sites (Team and Communication) and which one to use according to your needs

2 - What is a Microsoft 365 Group?

- Introduction to Microsoft 365 groups

3 - Plan the Site

- Analyse your needs using a simple grid
- Create a site outline using a template

4 - Shape the Base Site

- Create a SharePoint team site
- Link the site with an existing or new Teams team
- Access to the shared calendar and mailbox in Outlook
- Define access rights (Read, Edit, Full control)
- Add shared resources such as the Calendar and the Team Planner to the site

5 - Set up Management Document via Libraries

- Introduction to the SharePoint Libraries
- Add custom information (metadata) such as client name, project, manager, etc.

- Restrict access to a library to certain people only
- Adjust document versioning settings
- Create a document approval process before publication

6 - Create Work Tool Using SharePoint Lists

- Introduction to SharePoint lists
- Create status lists with dynamic formatting
- Create custom views (by client, by manager, etc.)
- Create a calendar for important dates
- Add a SharePoint list to a channel in Teams

7 - Set up Navigation

- Best practices to create an efficient navigation menu
- Organize pages into menus and sub-menus
- Customize the menu display according to the visitor (audience targeting)

8 - Manage and Upgrade the Site

- Access the recycle bin and restore deleted items
- Embed pages in a Teams channel
- Generate a report on items shared with external users
- Know about the automation possibilities of the Power Automate application.

Included with your training



Complete manual with step-by-step explanations



Exercise worksheets seen in class



Training Certificate



Recognition Badge that you can share on your LinkedIn page



Post-training follow-up offered for 6 months