

Microsoft® SharePoint® Modern Experience: Advanced Site Owner Bridge Document for 2.0 Edition

This bridge document is written for instructors who have used Logical Operations' *Microsoft® SharePoint® Modern Experience: Advanced Site Owner* Edition 1.0 courseware (091097) and want to quickly and efficiently identify the significant changes in the 2.0 edition of this course.

Since the release of the 1.0 Edition in 2019, Microsoft has made numerous changes in SharePoint, necessitating significant changes to the course. To take best advantage of the need to re-align the material with the SharePoint technical environment, we used the update as an opportunity to make other improvements, such as simplifying the course setup procedures and covering new features.

Overview of Changes

In the new *Microsoft® SharePoint® Modern Experience: Advanced Site Owner* course:

- Activities and other content have been updated to reflect changes in SharePoint and Microsoft 365 and new terminology.
- New slides have been created with a wide screen layout, more graphics and color, and all-new content.
- The initial environment configuration used in the course has been greatly simplified to make course setup tasks much easier and faster to perform, reducing the course setup instructions from nearly 15 pages down to less than two.
- Some content previously covered in this course has been moved to the first two courses in this series (091095 and 091096).
- Many governance and compliance features are undergoing rapid change, as Microsoft moves those features under the umbrella of Microsoft Purview, so this topic is no longer covered in this series.
- The course now covers the following topics of interest to advanced site builders:
 - Creation of custom site templates to automate repetitive site building tasks.
 - Enhanced coverage of content services, including managed metadata and custom content types.
 - Extended coverage of permissions.
 - Methods to improve the security configuration of SharePoint sites.

General Course Design

This course focuses on advanced site building tasks, some of which require some coordination with the organization's SharePoint Administrator. In many organizations, SharePoint site builders spend more time in SharePoint than the SharePoint or Microsoft 365 Administrator, which is often served by a separate role in IT, but may also be a departmental role, especially within smaller organizations. In many cases, site builders become more familiar with SharePoint capabilities and configuration than the administrators, and are likely to be more familiar with the requirements of the departments that use SharePoint on a daily basis.

Since many SharePoint features and capabilities can't be used unless enabled and configured by the SharePoint Administrator, it is important for site builders to get at least some understanding of what the SharePoint Administrator can do for them, so they can take advantage of all that SharePoint has to offer. Since the SharePoint Administrator may not be fully aware of the business tasks that every site

builder is trying to perform, it is important for these two groups to work together effectively. This course models how advanced SharePoint users can work in cooperation with their SharePoint Administrator to improve the efficiency and effectiveness of all site builders and users within the organization.

In this course, students play the role of advanced site builders, while the instructor plays the role of SharePoint Administrator *and* site builder. In course activities, each student creates and customizes their own SharePoint sites, periodically observing as the instructor enables features within the SharePoint Admin Center or using the SharePoint Online Management Shell that enable the students to make better or more efficient use of SharePoint. This provides students with insights into SharePoint features that can be enabled by their own SharePoint Administrator back in their workplace, so they know what to ask for and have some awareness of how it works.

Content Changes

The following table compares the general outline of the 1.0 and 2.0 editions of the course.

1.0 Course Edition	New 2.0 Course Edition
Lesson 1: Configuring Site Settings Topic A: Configure SharePoint Site Settings Topic B: Configure Navigation in SharePoint Topic C: Plan and Implement SharePoint Hub Sites	Lesson 1: Creating Custom Site Templates Topic A) Prepare a Site Script Topic B) Generate and Use a Custom Site Template
Lesson 2: Integrating External Data and Apps Topic A: Integrate Outlook with SharePoint Topic B: Integrate Other Microsoft Apps with SharePoint Topic C: Integrate Third-Party Apps and Services with SharePoint	Lesson 2: Managing Content Services Topic A) Plan and Configure Managed Metadata Topic B) Create and Manage Content Types Topic C) Use Managed Metadata for Navigation and Filtering
Lesson 3: Configuring Custom Content Types, Columns, and Document Sets Topic A: Create a Custom Content Type Topic B: Add Columns to Content Types Topic C: Create and Configure Document Sets	Lesson 3: Controlling Access Through Permissions Topic A) Assign Permissions Topic B) Manage Permissions Inheritance
Lesson 4: Managing Information Governance and Compliance Topic A: Configure Auditing in SharePoint Topic B: Activate and Configure Information Management Policies Topic C: Configure Retention Labels and Records Management Topic D: Manage Files with the Content Organizer	Lesson 4: Improving Security Topic A) Manage Access at the Site Level Topic B) Manage Access at the Tenant Level
Lesson 5: Designing and Creating a SharePoint Event Site Topic A: Design a SharePoint Site for an Event Topic B: Create a SharePoint Site for an Event	Appendix: Cleaning Up Unused SharePoint Resources

Course Setup When Presenting the Series in One Offering

There are three courses in this series on SharePoint:

- Microsoft® SharePoint® Modern Experience: Site Basics
- Microsoft® SharePoint® Modern Experience: Site Owner with Power Platform
- Microsoft® SharePoint® Modern Experience: Advanced Site Owner (this course)

If you deliver the courses immediately following each other, we recommend that you perform the Course Cleanup tasks at the end of each course to ensure that any changes made on your SharePoint tenant do not conflict with the setup requirements for each course.