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SharePoint Beyond Storage

A Practical Two-Day Capability and Advisory Programme

FA-0407 · Two-Day

Automation, RPA & Power Platform

Introduction

Structure information, improve collaboration, streamline work, and advise the organisation with confidence.

SharePoint is often introduced as a place to upload documents, but that description captures only a small part of its organisational value. Used properly, SharePoint can provide structured departmental workspaces, controlled document libraries, internal communication sites, searchable knowledge repositories, business registers, approval processes, and a foundation for collaboration across Microsoft 365. Microsoft positions SharePoint as a platform for managing content, organisational knowledge, collaboration, communication, applications, automation, and emerging AI-assisted experiences.

The real challenge is rarely finding another SharePoint feature. It is knowing which feature to use, how to structure it, how to control access, and when SharePoint is not the right solution. Poorly planned sites quickly become collections of duplicated folders, broken permissions, unexplained links, abandoned pages, and content that nobody can find. This programme therefore concentrates on practical design decisions rather than simply demonstrating menus and buttons.

Participants will examine how team sites, communication sites, document libraries, Microsoft Lists, pages, navigation, metadata, permissions, search, Teams, OneDrive, and Power Automate work together. Particular attention will be given to information architecture because columns, content types, views, naming standards, and navigation directly affect how easily information can be organised and discovered.

The programme is intended to move the team beyond being ordinary SharePoint users. Participants should leave able to hold a useful conversation with another department, identify its operational problem, determine whether SharePoint is suitable, recommend a sensible site structure, recognise governance risks, and explain what additional technical or administrative support may be required.

This is not a tenant-administration, software-development, PowerShell, SPFx, migration-engineering, or enterprise-records-management course. Administrative and licensing-dependent capabilities will be discussed where they affect solution decisions, but the emphasis remains on realistic departmental solutions that can be planned and supported within a two-day programme.

The instructor has more than 30 years of industry experience and will use real operational practices, common organisational scenarios, and industry-demanded content rather than presenting SharePoint as a purely academic subject. The delivery will emphasise decisions and working practices that participants can apply immediately within their organisation.

Learning outcomes

Upon successful completion of the programme, participants will be able to:

- Explain SharePoint's role within the Microsoft 365 environment
- Distinguish between SharePoint, Microsoft Teams, OneDrive, shared drives, and email attachments
- Identify suitable and unsuitable organisational use cases for SharePoint
- Recommend an appropriate team site or communication site structure
- Configure practical document libraries using metadata, views, versioning, and content controls
- Build Microsoft Lists for registers, requests, issues, actions, and departmental tracking
- Create useful pages, navigation, news, and departmental information areas
- Apply sensible permissions and sharing practices
- Explain the relationship between SharePoint sites and Microsoft Teams
- Use OneDrive synchronisation without confusing local, cloud, and synchronised files
- Design simple SharePoint-based notifications and approval workflows
- Recognise governance, ownership, lifecycle, security, and licensing considerations
- Gather departmental requirements and translate them into a practical SharePoint recommendation
- Diagnose common user, permissions, navigation, and synchronisation problems
- Advise departments without overpromising what SharePoint can deliver

Mandatory Prerequisites

Licensing and Tenant Access

These requirements must be verified by the client's Microsoft 365 administrator before the programme. Possessing an E5 licence does not automatically mean that a participant can create or manage SharePoint sites. Site creation can be restricted centrally, and Microsoft 365 Group creation restrictions may also prevent users from creating group-connected team sites.

- Every participant must have an active organisational Microsoft 365 account
- SharePoint Online must be enabled for every participant's account
- Participants must be able to open SharePoint from the Microsoft 365 environment

  Every participant must have one of the following:

  - Permission to create both team sites and communication sites
  - A dedicated training site with Site Owner or Full Control permission
  - A dedicated shared training site with clearly separated exercise areas

  Participants must be permitted to create and configure:

  - Document libraries
  - Microsoft Lists
  - Site columns
  - Views
  - Pages
  - Navigation links
  - Site members and permission groups
- Microsoft 365 Group creation must be enabled for participants conducting team-site exercises
- Power Automate must be enabled and tested with the standard SharePoint connector
- Microsoft Teams must be available where Teams and SharePoint integration is included
- OneDrive for work or school must be enabled for synchronisation exercises
- Multifactor authentication and conditional-access requirements must be tested before training
- Required training URLs must not be blocked by proxy, firewall, browser, or endpoint-security policies

Microsoft 365 Copilot, SharePoint Advanced Management, premium Power Automate connectors, and similar licensing-dependent services are not assumed to be included merely because participants have E5 licences. Microsoft 365 Copilot is separately licensed, while SharePoint Advanced Management availability depends on Microsoft 365 Copilot licensing or the appropriate add-on arrangements.

Mandatory Participant Computer Skills

Participants must already be able to perform the following tasks without trainer assistance:

- Sign in to Windows using an organisational account
- Use File Explorer confidently
- Identify drives, folders, subfolders, file names, extensions, and file paths
- Create, rename, copy, move, and delete files and folders
- Distinguish between a file and a folder
- Distinguish between local storage, network storage, OneDrive, and SharePoint
- Download a file and locate it afterwards

- Upload a file using a browser
- Use browser tabs, links, bookmarks, refresh, and downloads
- Open and save Word, Excel, and PowerPoint files
- Recognise basic OneDrive synchronisation status icons
- Understand that deleting a synchronised file may also remove it from the cloud
- Locate synchronised SharePoint libraries in Windows File Explorer
- Follow a multi-step written exercise independently

SharePoint and OneDrive libraries can be synchronised and managed through Windows File Explorer, making basic filesystem and synchronisation knowledge essential rather than optional.

Participants who cannot meet this baseline should complete a Windows and Microsoft 365 digital-workplace fundamentals course before attending. The SharePoint programme will not be reduced or delayed to teach elementary File Explorer, browser, account-sign-in, or file-management skills.

Required Training Environment

- Windows 10 or Windows 11 computer for every participant
- Current Microsoft Edge or Google Chrome browser
- Current OneDrive synchronisation client
- Microsoft 365 desktop applications or approved web applications
- Stable internet and Microsoft 365 connectivity
- Access to a non-production SharePoint training environment
- Sample departmental documents suitable for exercises
- At least one designated Microsoft 365 administrator available for access-related escalation
- Completion of a pre-course login, licensing, permissions, site-access, Power Automate, and synchronisation test
- Fully unrestricted internet access for th trainer

Hands-on delivery cannot proceed as designed when participants lack the required licences, site permissions, service access, or basic computer competence.

Training outline

1. SharePoint's Role within Microsoft 365

1. SharePoint as a content and collaboration platform
2. SharePoint, OneDrive, Teams, and shared-drive differences
3. Team sites and communication sites

4. Microsoft 365 Group-connected sites
5. Departmental, project, knowledge, communication, and process use cases
6. Situations where SharePoint is not the appropriate solution
7. Common organisational SharePoint failure patterns

2. Understanding SharePoint Site Architecture

1. Sites, pages, libraries, lists, and web parts
2. Site collections and modern site architecture
3. Team-site structure
4. Communication-site structure
5. Hub-site concepts
6. Departmental and project-site relationships
7. Site naming and classification standards
8. Site ownership and business accountability
9. Navigation planning
10. Site templates and repeatable structures
11. Site lifecycle considerations

3. Planning Departmental SharePoint Solutions

1. Business requirement discovery
2. User and stakeholder identification
3. Content and process analysis
4. Current-state file-storage assessment
5. Information sensitivity considerations
6. Ownership and support requirements
7. Solution-scope definition
8. Minimum viable site planning
9. Adoption and change considerations
10. SharePoint suitability assessment

4. Document Libraries and Content Management

1. Document-library planning
2. Folder-based and metadata-based organisation
3. Columns and site columns

4. Choice, date, person, number, and managed metadata fields
5. Required and optional metadata
6. Content types
7. Library views
8. Filtering, grouping, and sorting
9. Version history
10. Major and minor versions
11. Content approval
12. Check-in and check-out
13. Document templates
14. Co-authoring
15. File naming standards
16. Duplicate-content prevention
17. Recycle Bin and document recovery
18. Library configuration mistakes

5. Microsoft Lists for Departmental Tracking

1. Lists and document-library differences
2. List templates
3. Custom list design
4. Column selection and data types
5. List views
6. Filtering, sorting, and grouping
7. Conditional formatting
8. List forms
9. Rules and notifications
10. Issue and action registers
11. Request and approval registers
12. Asset and equipment registers
13. Policy and procedure registers
14. List ownership and maintenance

6. Pages, News, Navigation, and Internal Communication

1. Modern SharePoint pages

2. Page sections and layouts
3. Standard web parts
4. Text, image, link, document, list, and library web parts
5. Hero and Quick Links web parts
6. News posts
7. Departmental announcements
8. Landing-page design
9. Page publishing
10. Page versioning
11. Page approval concepts
12. Site navigation
13. Hub navigation concepts
14. Audience targeting concepts
15. Content ownership and review

7. Permissions, Access, and Sharing

1. SharePoint permission model
2. Site Owners, Members, and Visitors
3. Microsoft 365 Groups and SharePoint groups
4. Permission inheritance
5. Unique permissions
6. Library, folder, file, list, and item permissions
7. Direct access and sharing links
8. Internal sharing
9. External-sharing awareness
10. View, edit, and owner access
11. Least-privilege principles
12. Oversharing risks
13. Permission-request handling
14. Access troubleshooting
15. Broken-inheritance problems
16. Permission documentation and reviews

8. SharePoint, Teams, OneDrive, and Office Integration

1. SharePoint sites behind Microsoft Teams
2. Teams channel file storage
3. Standard and private channel considerations
4. Opening Teams files in SharePoint
5. Adding SharePoint content to Teams
6. OneDrive and SharePoint differences
7. Library synchronisation
8. Add Shortcut to OneDrive
9. Files On-Demand
10. Synchronisation status indicators
11. Local, cloud-only, and locally available files
12. Moving and deleting synchronised content
13. Office document co-authoring
14. Common synchronisation failures
15. Safe synchronisation practices

9. Search and Information Findability

1. SharePoint search behaviour
2. Site and organisation-wide search
3. Search permissions
4. Metadata and search relevance
5. File names and document titles
6. Filters and refiners
7. Navigation and search relationships
8. Promoted and authoritative content concepts
9. Content that users cannot find
10. Improving departmental findability

10. SharePoint-Based Workflow and Automation

1. Automation opportunity identification
2. SharePoint rules
3. Power Automate integration
4. SharePoint triggers and actions

5. List-item notifications
6. Document notifications
7. Approval workflow concepts
8. Status updates
9. Reminder workflows
10. Email and Teams notifications
11. Flow ownership
12. Connection management
13. Service-account considerations
14. Workflow failure handling
15. Standard and premium connector awareness
16. Automation support boundaries

11. Governance and Sustainable SharePoint Use

1. SharePoint governance principles
2. Site-request and approval processes
3. Site naming and classification
4. Ownership requirements
5. Content-owner responsibilities
6. Site lifecycle management
7. Inactive and abandoned sites
8. Content review and archiving
9. Permission reviews
10. External-sharing controls
11. Sensitive-information considerations
12. Retention and compliance awareness
13. Storage and duplication concerns
14. Site-sprawl prevention
15. Training and adoption responsibilities
16. Governance escalation paths

12. Current SharePoint Capability and Licensing Awareness

1. SharePoint Advanced Management
2. Microsoft 365 Copilot integration

3. SharePoint agents
4. Licensing-dependent governance controls
5. Premium automation capabilities
6. Tenant-controlled feature availability
7. Microsoft 365 service changes
8. Organisational readiness for new capabilities
9. Security and permission readiness for AI-assisted content access

13. Supporting and Advising Other Departments

1. Departmental discovery conversations
2. Business problem definition
3. Content, communication, and process requirements
4. User-role identification
5. Permission and ownership questions
6. Translating requirements into SharePoint components
7. Setting realistic expectations
8. Identifying licensing dependencies
9. Identifying administrator dependencies
10. Recognising custom-development requirements
11. Recognising unsuitable requests
12. Recommendation documentation
13. Support-boundary definition
14. User-guidance preparation
15. Escalation to Microsoft 365 administrators

14. Common Problems and Practical Troubleshooting

1. Missing site-creation options
2. Insufficient site permissions
3. Missing files and libraries
4. Incorrect sharing links
5. Broken permission inheritance
6. Navigation problems
7. Version-history confusion
8. Deleted-content recovery

9. OneDrive synchronisation errors
10. Duplicate synchronised folders
11. Teams and SharePoint file-location confusion
12. Power Automate connection failures
13. Browser and cached-credential problems
14. Licence and service-assignment problems
15. Effective escalation information

15. Applied SharePoint Solution Planning

1. Departmental scenario assessment
2. Site-type selection
3. Information-architecture planning
4. Library and list selection
5. Metadata and view planning
6. Permissions planning
7. Page and navigation planning
8. Workflow-opportunity identification
9. Ownership and governance planning
10. Support and adoption planning
11. Solution recommendation presentation

Disclaimer

This training outline is provided as an indicative framework for planning and delivering the programme. The trainer may amend, reorder, expand, reduce, substitute, or omit any topic, exercise, demonstration, or activity where reasonably necessary to accommodate participant readiness, available licensing, tenant configuration, security restrictions, organisational priorities, technical conditions, or time constraints. Such adjustments may be made at the trainer's professional discretion without prior notice, provided that the overall intent and principal learning objectives of the programme are preserved.

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