

SharePoint Online Modern Experience Practical Guide

2nd Edition

*Migrate to the modern experience and get the most out of
SharePoint including Power Platform*

Bijay Kumar Sahoo



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First published: 2019

Second published: 2024

Published by BPB Online

WeWork

119 Marylebone Road

London NW1 5PU

UK | UAE | INDIA | SINGAPORE

ISBN 978-93-5551-577-3

www.bpbonline.com

Dedicated to

My late sister

Nini

About the Author

Bijay Kumar Sahoo is a ten-time Microsoft MVP (Most Valuable Professional) with over seventeen years of technical experience in Microsoft technologies, with a spotlight on SharePoint. His vast experience spans both SharePoint on-premises and SharePoint Online. Throughout his journey, he's been an integral part of esteemed corporations such as HP, TCS, and KPIT, holding pivotal roles as a SharePoint architect. Currently, he helms TSinfo Technologies Pvt Ltd, a premier SharePoint development company that provides innovative solutions to clients across the United States and Europe.

But his impact doesn't stop there. Bijay is the mastermind behind two renowned SharePoint websites, SPGuides.com and EnjoySharePoint.com. These platforms are not just businesses but serve as lifelines to the SharePoint community. For his continued contributions and unparalleled expertise, Microsoft has consecutively recognized him as an MVP for the past decade. Beyond his business endeavors, Bijay has a passion for education. He shares his wealth of SharePoint knowledge with a global audience through his YouTube channel, "EnjoySharePoint", making the complexities of the platform accessible to all.

Acknowledgement

I want to express my deepest gratitude to my co-worker Preeti Sahu who helped me in this journey, and gave us her valuable feedback and suggestions on the book.

I also want to give my love to my daughter Tamanna who encouraged me on this journey without knowing the importance of this book

I am also grateful to BPB Publications for their guidance and expertise in bringing this book to fruition. It was a long journey of revising this book, with valuable participation and collaboration of reviewers, technical experts, and editors.

I would also like to acknowledge the valuable contributions of my readers from my SharePoint web sites SPGuides.com and EnjoySharePoint.com, who have taught me so much and provided valuable feedback on my work.

Finally, I would like to thank all the readers who have taken an interest in my book, and for their support in making it a reality. Your encouragement has been invaluable

Preface

Building enterprise applications is a complex task that requires a comprehensive understanding of the latest technologies and programming languages. C# and .NET are powerful tools that have become increasingly popular in the field of enterprise development.

This book is designed to provide a comprehensive guide to building enterprise applications with C# and .NET. It covers a wide range of topics, including the basics of C# programming, advanced concepts such as object-oriented programming, and the use of the .NET platform for building robust and scalable applications.

Throughout the book, you will learn about the key features of C# and .NET and how to use them to build enterprise applications that are efficient, reliable, and easy to maintain. You will also learn about the best practices and design patterns for building enterprise applications and will be provided with numerous practical examples to help you understand the concepts.

This book is intended for developers who are new to C# and .NET and want to learn how to build enterprise applications. It is also helpful for experienced developers who want to expand their knowledge of these technologies and improve their skills in building robust and reliable applications. I hope you will find this book informative and helpful.

Chapter 1: Introduction to SharePoint Online- explains everything needed for the reader to know the overview of Microsoft 365 and SharePoint including all its plans and subscriptions. Furthermore, the chapter also gives an idea about Microsoft 365 Admin Center and all the interface Components. Moreover, the reader will get to know what SharePoint Online is, why we use it and what SharePoint Online Admin Center is, including its key settings. This chapter also walks through the overview of Classic SharePoint and its benefits.

Chapter 2: SharePoint Modern Team Site – presents the detailed overview of Modern Team site in SharePoint exploring their key features, creation, customization, and management. From understanding site settings and navigation to exploring site templates and permissions, readers will equip with the knowledge they need to harness the power of SharePoint. Throughout, this chapter covers a range of topics, from site usage analytics to integrating with Microsoft Teams and even handling the complexities of subsites.

Chapter 3: SharePoint Communication Sites - covers the details overview of Communication site in SharePoint exploring why it is important to create Communication site, exploring their key features, creation, customization, and management. The readers will learn about site settings, how to make your site easy to navigate, using different templates, setting permissions, and

connecting with Microsoft Teams. This chapter will also explain managing subsites, which are deeper components of the Communication site, and monitoring how it is used. Furthermore, this chapter shows how you can share the Communication site with your team members.

Chapter 4: SharePoint Online Modern List - is a guide to SharePoint Online lists. The reader will explore what they are, their advantages, and how to create and manage them effectively. This chapter will also equip the readers with creating list columns, managing items, setting permissions, filtering data, and customizing the list's appearance. This chapter will go through the templates, views, and even add, edit and delete options. By the end, the reader will be well-versed in making the most of SharePoint Online lists.

Chapter 5: SharePoint Online Modern Library - is a guide to SharePoint Online modern libraries. It covers the advantages of using them, how to create and manage document libraries, working with columns, settings, and files, as well as version history, templates, permissions, audience targeting, custom views, exporting to Excel, and backup / restore procedures. Whether you are new to SharePoint or looking to deepen your knowledge, this chapter provides practical insights to make the most of SharePoint Online modern libraries.

Chapter 6: SharePoint Modern Pages - explores the basic concepts of modern SharePoint pages in a simple way. Readers will start learning the difference between site pages and web part pages. Further, they will learn the benefits of using SharePoint site pages and this chapter guides you through creating and customizing them. Readers will also learn how to save your pages as templates, redirect them, and manage page navigation. This chapter also covers features like hiding certain properties, tracking comments, likes, and views, and using audience targeting to make your pages more relevant to specific groups of people. Additionally, this chapter explains breadcrumbs and introduces you to features like "Save for Later," "Send by Email," and how to delete a SharePoint site page. This chapter is an easy-to-follow guide to making the most of modern SharePoint Online pages.

Chapter 7: Modern Web Parts in SharePoint Online - explains with detail and numerous practical examples various SharePoint Online Web Parts, and how to insert a web part in SharePoint Online Modern Page. This chapter also allows the reader to learn how to delete the SharePoint Web Part, how to move and make duplicate a SharePoint web part in the modern page. Here the reader will get to know some of the important Web parts in SharePoint Online like Text, Image gallery, Quick links, News, People, and many more.

Chapter 8: Power Apps - explains what is Power Apps, their advantages, along with all the drawbacks, permissions, connectors etc. This chapter covers practical examples of Power Apps integrating with SharePoint, various Power Apps controls including saving and publishing the

application. Also, the reader will get to know what Delegation in Power Apps is and how to share the Power Apps with other users including various scenarios.

Chapter 9: Power Automate - explores the world of automation in an easy-to-understand way. This chapter starts introducing “Power Automate” and its advantages in simplified way. It will also guide you through the “Connectors” and “Types of Actions” that make this tool so versatile. The reader will learn about triggers and actions, and what a “Flow” is, along with the different types available. Also, this chapter will teach readers how to create a flow using SharePoint, create manual triggers, use APIs to create SharePoint lists, discover how to share your flows, turn them on/off, and delete them as needed.

Chapter 10: Power BI - covers “What is Power BI” and introduces “Power BI Desktop” and its key features. Readers will learn about “Power BI Reports,” the data sources it connects to, including SharePoint. This chapter explains the powerful “Power Query” for data transformations and provides an overview of “Visualization in Power BI. Readers will discover how to “Create Power BI Reports” using SharePoint data. The chapter also touches on “Power BI Service,” teaching readers how to “Publish and Share Reports” and embed them with SharePoint Online. Further, this chapter guides readers through “Creating Power BI Dashboards” and explain how “Power BI SharePoint Data Refresh” keeps your data up-to-date automatically

Chapter 11: SharePoint Framework - covers the introduction to SPFx, helps readers to set up their development environment, and guides them in creating their first client-side web part. They will learn about web part properties and the property pane. Readers also explore SharePoint Framework Extensions, including application customizers, field customizers, command sets, and form customizers. Whether the readers are new to SPFx or looking to expand their skills, this chapter will make readers proficient in building customized solutions for SharePoint.

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Please follow the link to download the *Code Bundle* and the *Coloured Images* of the book:

<https://rebrand.ly/b6w1znl>

The code bundle for the book is also hosted on GitHub at:

<https://github.com/bpbpublications/SharePoint-Online-Modern-Experience-Practical-Guide-2nd-Edition>.

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CHAPTER 1

Introduction to SharePoint Online

Introduction

This chapter will go through every aspect of SharePoint in depth, from the fundamentals to the more complex features, such as what Microsoft 365 is and its subscriptions, the advantages of utilizing Microsoft 365, and how to sign up for a Microsoft 365 trial.

Also, we will overlook everything related to the Microsoft 365 Admin Center, including its functions, how to access it, information on Microsoft 365 Users, etc.

The readers will also learn more about SharePoint Online, Modern SharePoint Online, why a company would utilize SharePoint Online, what the SharePoint Online Admin Center is and how it can be used.

At last, we will learn the differences between modern SharePoint and traditional SharePoint, as well as the benefits of modern SharePoint online, how to go from a classic experience in SharePoint to a modern experience, and much more.

Structure

This chapter describes everything related to Microsoft 365 and SharePoint Online, including the reasons why people use it, the types of subscriptions it offers, and its costs.

Additionally, we will go over everything there is to know about SharePoint Online, including its advantages, incentives, and an overview of the SharePoint Online Admin Center.

The entire list of topics we will be covering in this chapter are:

- Overview of Microsoft 365
- Microsoft 365 subscriptions
- Microsoft 365 trial
- Overview of Microsoft 365 admin center
- Adding users in Microsoft 365
- What is SharePoint Online?
- Benefits of using SharePoint Online for an organization
- Overview of SharePoint Online admin center
- Overview of classic SharePoint
- Overview of Modern SharePoint Online
- Advantages of Modern SharePoint Online
- Enabling the Modern experience at Tenant Level

Objectives

If you are unfamiliar with Microsoft 365 SharePoint Online, this chapter will help you gain a thorough understanding of SharePoint Online, how to sign up for a free trial of Microsoft 365, how to utilize the Microsoft 365 Admin Center, and its benefits.

Likewise, the reader will be able to comprehend topics like how to add users in Microsoft 365, the differences between a modern and classic version of SharePoint, how to enable the modern experience at the tenant level, and more.

Overview of Microsoft 365

The cloud-based platform for collaboration known as Microsoft 365, which offers Office apps and other services, is available for anyone to subscribe to. Additionally, you may use the internet to access emails, contacts, calendars, and other office programs like OneNote, Excel, Word, PowerPoint, and Outlook.

Office 365 was renamed Microsoft 365 on April 21, 2020, to highlight the service's current inclusion of goods and services outside the core Microsoft Office software family (including cloud-based productivity tools and artificial intelligence features).

Exclusive intelligent features like ideas in Excel, researcher in Word, real-time communication, Teams as the center of teamwork, and cutting-edge security features are all part of Microsoft 365 Apps for Enterprise.

You can have the most recent Microsoft Office programs by subscribing to Microsoft 365. You may install Microsoft 365 on all your devices with Microsoft 365 family, allowing you to log in to five devices simultaneously and use Office from any location or device.

Benefits of using Microsoft 365

Some of the top advantages listed below illustrate why we chose Microsoft 365:

- Microsoft Teams, Outlook, Word, Excel, and other top-tier office applications are all included with Microsoft 365.
- It is possible to install Microsoft 365 on PCs, Macs, tablets, and phones.
- It provides 1 TB of OneDrive cloud storage.
- You can install Office with a user-based license on up to five PCs or Macs, five tablets, and five mobile devices.
- With such ease of use and flexibility, it is fairer to permit your staff to work remotely without compromising productivity or important data. Employing Microsoft Office 365 similarly makes it simpler for staff to collaborate while not being present in the same location.
- You can always get the most recent office applications from Microsoft with the help of the subscription service of Microsoft 365.

Microsoft 365 subscriptions

There are three varying plans available with Microsoft 365. They are,

- For home
- For business
- For enterprise

For home

There are two different kinds of home plans offered by Microsoft 365, namely

- Paid yearly
- Paid monthly

Paid yearly

The following table gives details about the yearly plan of home Microsoft 365:

Microsoft 365 Family \$99.99/year	Microsoft 365 Personal \$69.99/year
For one to six people.	For one person.
Use up to five devices simultaneously.	Use up to five devices simultaneously.
Works on PC, Mac, iPhone, iPad, and Android phones and tablets. ⁴	Works on PC, Mac, iPhone, iPad, and Android phones and tablets. ⁴
Up to 6 TB of cloud storage (1 TB per person).	1 TB of cloud storage.
Additional features in the Family Safety mobile app.	

Table 1.1: Microsoft 365 Paid yearly Subscriptions

Paid monthly

The following table gives details about the monthly plan of home Microsoft 365:

Microsoft 365 Family \$9.99/month	Microsoft 365 Personal \$6.99/month
For one to six people.	For one person.
Use up to five devices simultaneously.	Use up to five devices simultaneously.
Works on PC, Mac, iPhone, iPad, and Android phones and tablets. ⁴	Works on PC, Mac, iPhone, iPad, and Android phones and tablets. ⁴
Up to 6 TB of cloud storage (1 TB per person).	1 TB of cloud storage.
Additional features in the Family Safety mobile app.	

Table 1.2: Microsoft 365 Paid monthly Subscriptions

To know more details about this Microsoft 365 home plans, you can refer to this MSDN below:

<https://www.microsoft.com/en-us/microsoft-365/buy/compare-all-microsoft-365-products>

For business

In Microsoft 365, there are four different kinds of business plans accessible such as,

Microsoft 365 Business Basic \$6.00 user/month	Microsoft 365 Business Standard \$12.50 user/month	Microsoft 365 Business Premium \$22.00 user/month	Microsoft 365 Apps for business \$8.25 user/month
Web and mobile versions of Microsoft 365 apps only	Desktop versions of Microsoft 365 apps with premium features	Advanced security	Desktop versions of Microsoft 365 apps with premium features
Chat, call, meet up to 300 attendees	Easily host webinars	Access and data control	1 TB of cloud storage per user
1 TB of cloud storage per user	Attendee registration and reporting tools	Cyberthreat protection	Standard security
Business-class email	Manage customer appointments		Anytime phone and web support
Standard security			
Anytime phone and web support			

Table 1.3: Microsoft 365 Subscriptions For business

To know more details about this Microsoft 365 Business Plans, you can refer to this MSDN below:

<https://www.microsoft.com/en-us/microsoft-365/business/compare-all-microsoft-365-business-products>

For enterprise

The three types of Microsoft 365 Enterprise plans are as follows:

- Microsoft 365 E3
- Microsoft 365 E5
- Microsoft 365 F3

The following table describes these in detail:

	Microsoft 365 E3 \$36.00 user/month	Microsoft 365 E5 \$57.00 user/month	Microsoft 365 F3 \$8.00 user/month
Microsoft 365 Apps	Yes	Yes	Yes
Email and calendar	Yes	Yes	Yes