

# SharePoint Online Modern Experience Practical Guide

2<sup>nd</sup> Edition

---

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

---

**Bijay Kumar Sahoo**



[www.bpbonline.com](http://www.bpbonline.com)

Copyright © 2024 BPB Online

*All rights reserved.* No part of this book may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, without the prior written permission of the publisher, except in the case of brief quotations embedded in critical articles or reviews.

Every effort has been made in the preparation of this book to ensure the accuracy of the information presented. However, the information contained in this book is sold without warranty, either express or implied. Neither the author, nor BPB Online or its dealers and distributors, will be held liable for any damages caused or alleged to have been caused directly or indirectly by this book.

BPB Online has endeavored to provide trademark information about all of the companies and products mentioned in this book by the appropriate use of capitals. However, BPB Online cannot guarantee the accuracy of this information.

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](http://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.



## Code Bundle and Coloured Images

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>**.  
In case there's an update to the code, it will be updated on the existing GitHub repository.

We have code bundles from our rich catalogue of books and videos available at **<https://github.com/bpbpublications>**. Check them out!

## Errata

We take immense pride in our work at BPB Publications and follow best practices to ensure the accuracy of our content to provide with an indulging reading experience to our subscribers. Our readers are our mirrors, and we use their inputs to reflect and improve upon human errors, if any, that may have occurred during the publishing processes involved. To let us maintain the quality and help us reach out to any readers who might be having difficulties due to any unforeseen errors, please write to us at :

**[errata@bpbonline.com](mailto:errata@bpbonline.com)**

Your support, suggestions and feedbacks are highly appreciated by the BPB Publications' Family.

Did you know that BPB offers eBook versions of every book published, with PDF and ePub files available? You can upgrade to the eBook version at [www.bpbonline.com](http://www.bpbonline.com) and as a print book customer, you are entitled to a discount on the eBook copy. Get in touch with us at :

**[business@bpbonline.com](mailto:business@bpbonline.com)** for more details.

At **[www.bpbonline.com](http://www.bpbonline.com)**, you can also read a collection of free technical articles, sign up for a range of free newsletters, and receive exclusive discounts and offers on BPB books and eBooks.

### Piracy

If you come across any illegal copies of our works in any form on the internet, we would be grateful if you would provide us with the location address or website name. Please contact us at **business@bpbonline.com** with a link to the material.

### If you are interested in becoming an author

If there is a topic that you have expertise in, and you are interested in either writing or contributing to a book, please visit **www.bpbonline.com**. We have worked with thousands of developers and tech professionals, just like you, to help them share their insights with the global tech community. You can make a general application, apply for a specific hot topic that we are recruiting an author for, or submit your own idea.

### Reviews

Please leave a review. Once you have read and used this book, why not leave a review on the site that you purchased it from? Potential readers can then see and use your unbiased opinion to make purchase decisions. We at BPB can understand what you think about our products, and our authors can see your feedback on their book. Thank you!

For more information about BPB, please visit **www.bpbonline.com**.

## Join our book's Discord space

Join the book's Discord Workspace for Latest updates, Offers, Tech happenings around the world, New Release and Sessions with the Authors:

<https://discord.bpbonline.com>



# Table of Contents

<b>1. Introduction to SharePoint Online .....</b>	<b>1</b>
Introduction .....	1
Structure .....	1
Objectives .....	2
Overview of Microsoft 365 .....	2
<i>Benefits of using Microsoft 365.....</i>	<i>3</i>
Microsoft 365 subscriptions .....	3
<i>For home .....</i>	<i>3</i>
<i>Paid yearly .....</i>	<i>4</i>
<i>Paid monthly.....</i>	<i>4</i>
<i>For business.....</i>	<i>4</i>
<i>For enterprise .....</i>	<i>5</i>
Microsoft 365 trial .....	7
<i>Microsoft 365 business premium's advantages.....</i>	<i>7</i>
<i>Trial for SharePoint with Microsoft 365 business premium plan.....</i>	<i>8</i>
<i>Join Microsoft 365 Developer program for free.....</i>	<i>20</i>
<i>Microsoft 365 Developer program advantages .....</i>	<i>20</i>
Overview of Microsoft 365 admin center .....	30
<i>Access Microsoft 365 admin center.....</i>	<i>31</i>
<i>Interface components of Microsoft 365 admin center .....</i>	<i>32</i>
<i>Top management panel.....</i>	<i>32</i>
<i>Left navigation pane.....</i>	<i>33</i>
<i>Admin centers panel .....</i>	<i>41</i>
<i>Different views in Microsoft 365 Admin center .....</i>	<i>43</i>
<i>Microsoft 365 Admin Center in simplified view .....</i>	<i>43</i>
<i>Microsoft 365 Admin Center in Dashboard View .....</i>	<i>44</i>

Adding users in Microsoft 365 Admin Center .....	45
<i>Adding users in the Microsoft 365 Admin Dashboard view</i> .....	45
<i>Adding a single user in the Microsoft 365 Admin Simplified view</i> .....	49
<i>Add multiple users at a time in the Microsoft 365 Admin</i>	
<i>Dashboard view (Using CSV File)</i> .....	50
<i>Adding multiple users at a time in the Microsoft 365 Admin Dashboard view</i> .....	53
What is SharePoint Online? .....	54
Benefits of using SharePoint Online for an organization .....	54
<i>Real-time collaboration</i> .....	55
<i>Data management</i> .....	55
<i>Enhanced security</i> .....	55
<i>Better productivity</i> .....	56
<i>Integration with existing apps</i> .....	56
<i>Document sharing</i> .....	56
<i>Saving money</i> .....	56
Overview of SharePoint Online Admin center .....	56
<i>Access SharePoint Online Admin center</i> .....	57
<i>Sites</i> .....	58
<i>Policies</i> .....	59
<i>Settings</i> .....	61
<i>Content services</i> .....	62
<i>Migration</i> .....	63
<i>Reports</i> .....	64
<i>Advanced</i> .....	65
Overview of classic SharePoint .....	67
<i>Time period for a classic SharePoint online experience</i> .....	67
Overview of Modern SharePoint Online .....	67
<i>Navigation</i> .....	68
<i>Branding</i> .....	68
<i>Publishing</i> .....	68

<i>Search</i> .....	68
<i>Sharing and permissions</i> .....	69
<i>Performance</i> .....	69
<i>Multilingual</i> .....	69
Advantages of Modern SharePoint Online .....	69
Enabling the modern experience at tenant level .....	70
<i>SharePoint Online list and document library switch to New Experience</i> .....	73
Conclusion .....	74
Points to remember.....	75
<b>2. SharePoint Modern Team Site .....</b>	<b>77</b>
Introduction .....	77
Structure .....	77
Objectives .....	78
Overview of team site in SharePoint.....	79
Creating a SharePoint team site .....	79
Key features of SharePoint Modern team site.....	80
Creating a Modern team site in SharePoint .....	80
Customizing Modern SharePoint team site .....	85
<i>Using the theme to change the color of the SharePoint Team site</i> .....	86
<i>Customizing SharePoint team site header</i> .....	87
<i>Customizing SharePoint team site navigation</i> .....	90
<i>Applying mega menu style</i> .....	92
<i>Applying cascading style</i> .....	94
Overview of site contents.....	94
Introduction to SharePoint site settings.....	96
Navigating SharePoint Online team site and Quick Launch.....	97
<i>Adding a link to the navigation menu on a team site</i> .....	98
<i>Targeting navigational link to specific audiences</i> .....	99
<i>Changing the order of the menu link</i> .....	100
<i>Creating sub-links on the menu</i> .....	100

<i>Promoting sub-link as the parent link on the menu .....</i>	101
<i>Remove a link from the Quick Launch menu.....</i>	102
SharePoint site template.....	103
<i>Applying built-in site template in SharePoint site .....</i>	103
Overview of recycle bin .....	105
Changing SharePoint team site URL.....	105
SharePoint site permissions.....	107
<i>Provide SharePoint site permission.....</i>	108
Access request settings .....	108
Share SharePoint team site.....	110
SharePoint site usage analytics .....	111
Converting SharePoint Modern team site to communication site.....	113
Connecting Modern SharePoint team site to Teams .....	113
Working with subsites in SharePoint Online .....	116
<i>Working with subsites in SharePoint Online team site.....</i>	116
<i>Creating a subsite in SharePoint Online team site.....</i>	117
Deleting a modern team site in SharePoint Online.....	119
Conclusion .....	120
<b>3. SharePoint Communication Sites .....</b>	<b>123</b>
Introduction .....	123
Structure .....	123
Objectives .....	124
Overview of communication site in SharePoint online.....	124
Key features of SharePoint modern communication site.....	125
SharePoint modern team site vs. communication site.....	126
Create a modern SharePoint communication site .....	127
Customize modern SharePoint communication site.....	128
Overview of navigation in communication site .....	130
<i>Enable site navigation audience targeting .....</i>	132
<i>Change the order of menu link .....</i>	133

Create sub links on the menu .....	133
Move a sub links on the menu.....	134
Overview of site content and site settings.....	135
Site settings option in communication site.....	136
SharePoint communication site permissions .....	137
SharePoint communication site template .....	138
Modern SharePoint communication site .....	139
Add footer to SharePoint communication site .....	141
Delete a modern communication site in SharePoint online.....	141
Conclusion .....	143
<b>4. SharePoint Online Modern List .....</b>	<b>145</b>
Introduction .....	145
Structure .....	145
Objectives .....	146
What is SharePoint Online modern list?.....	146
Advantages of the SharePoint Online Modern list .....	147
Creating SharePoint Online Modern list .....	148
Creating different types of SharePoint list columns .....	150
Adding items into the SharePoint Online modern list .....	154
Adding several items to the SharePoint list .....	155
Adding new list item from URL.....	155
Adding calculated columns to the SharePoint Online modern list .....	156
Editing and deleting items from SharePoint List .....	158
Editing items in the SharePoint list.....	158
Deleting items in the SharePoint list .....	158
SharePoint Online modern list permission .....	159
Customizing SharePoint Online modern list permissions .....	161
SharePoint Online modern list item level permission .....	162
Filtering a SharePoint Online Modern list.....	163
SharePoint Online list settings .....	165

General settings.....	166
Permissions and management.....	168
Communications .....	168
SharePoint list column formatting.....	168
Formatting SharePoint list column using JSON.....	169
Getting started with SharePoint column formatting using JSON.....	169
Example 1: Formatting choice column in the SharePoint list .....	170
Example 2: Formatting date column in the SharePoint list .....	172
Formatting SharePoint list column using prebuild formats.....	173
Example 1: Formatting the Date column in the SharePoint list .....	173
Example 2: Formatting the person column in the SharePoint list .....	175
SharePoint Online modern list view .....	175
SharePoint Online modern list view edits .....	177
SharePoint Online modern list view audience targeting .....	178
Enabling audience targeting on the SharePoint list .....	178
SharePoint Online modern list view threshold .....	179
Discussing SharePoint Online modern list templates .....	180
SharePoint Online modern Calendar list.....	182
SharePoint Online modern contact list.....	183
SharePoint Online modern task list .....	184
Change SharePoint Online task list to Modern view .....	185
Backup and restore the SharePoint Online modern list .....	186
Conclusion .....	186
Points to remember .....	187
<b>5. SharePoint Online Modern Library.....</b>	<b>189</b>
Introduction .....	189
Structure .....	189
Objectives .....	190
Introduction to SharePoint Document library .....	190
Advantages of SharePoint Document library .....	191



Creating a SharePoint document library .....	192
SharePoint document library add columns .....	192
SharePoint library settings.....	195
<i>General settings</i> .....	195
<i>Permissions and management settings</i> .....	196
<i>Communication</i> .....	197
Working with files in SharePoint library .....	197
SharePoint library version history .....	200
SharePoint library permissions and Management.....	201
<i>Grant permissions on the SharePoint document library</i> .....	202
<i>Create group and assign permissions on the SharePoint document library</i> .....	203
<i>Edit user permissions on a document library</i> .....	203
Audience targeting .....	204
SharePoint Online document library views .....	205
SharePoint Online document library custom view.....	208
Exporting SharePoint modern library to excel sheet .....	209
Restore/backup SharePoint modern library.....	210
Conclusion .....	212
Points to remember.....	212
<b>6. SharePoint Modern Pages.....</b>	<b>215</b>
Introduction .....	215
Structure .....	215
Objectives .....	216
Introduction to Modern SharePoint Online page.....	216
Types of Site pages in SharePoint Online .....	217
Site page vs web part page .....	218
Using SharePoint site pages .....	218
Creating a site page in SharePoint Online.....	219
Customizing a Modern SharePoint page.....	222
Header and footer of the SharePoint site page .....	224

Layout of the SharePoint Online Modern Page.....	225
Adding background image to SharePoint Page .....	225
Displaying SharePoint Page in Fullwidth .....	226
Adding a table to the SharePoint Site page.....	227
Adding Bookmark and anchor links to SharePoint page.....	228
Finding site pages in SharePoint Online.....	231
Redirect a SharePoint modern page .....	231
Audience targeting in a SharePoint Site Page.....	233
Comments, likes, and views in the Site Page.....	234
Disable comments from SharePoint Site page .....	235
Save for later online SharePoint site page .....	235
Immersive reader in SharePoint Site page .....	236
Send your SharePoint site page by email .....	237
Delete a SharePoint site page .....	238
What is SharePoint webparts .....	238
Conclusion .....	239
Points to remember.....	239
<b>7. Modern Web Parts in SharePoint Online .....</b>	<b>241</b>
Introduction .....	241
Structure .....	241
Objectives .....	242
Introduction to Web parts in SharePoint Online .....	243
Adding a Web part in SharePoint Online Modern Page .....	243
<i>Move, Duplicate, and Delete Web part in SharePoint Online Modern page .....</i>	<i>246</i>
Text web part in SharePoint Online.....	247
Image gallery web part in Modern SharePoint Online .....	249
Quick links web part in SharePoint Online.....	251
News web part in SharePoint Online .....	252
<i>Add a news post by link .....</i>	<i>256</i>
<i>Removing the news web part.....</i>	<i>258</i>

People web part in SharePoint Online .....	259
Button web part in SharePoint Online .....	262
Call to action web part in SharePoint Online.....	263
Hero web part in SharePoint Online .....	265
Document library web part in SharePoint Online.....	269
File and Media viewer web part in SharePoint Online .....	271
Modern SharePoint highlighted content web part .....	274
List web part in Modern SharePoint Online .....	277
Recent documents web part in SharePoint Online page.....	279
Events web part in Modern SharePoint Online .....	280
<i>Adding events in events web part .....</i>	<i>282</i>
Group calendar web part in SharePoint Online .....	284
Organization chart web part in SharePoint Online.....	287
Microsoft forms web part in SharePoint Online.....	288
Quick chart web part in SharePoint Online .....	290
Site activity web part in SharePoint Online .....	292
World clock web part in SharePoint Online .....	294
Code snippet web part in SharePoint Online page.....	295
Embed web part in SharePoint Online Page.....	297
Conclusion .....	299
<b>8. Power Apps.....</b>	<b>301</b>
Introduction .....	301
Structure .....	301
Objectives .....	302
What is Power Apps? .....	302
Different Components in Power Apps .....	302
Working with Power Apps connectors .....	304
How to connect Power Apps with various connectors .....	305
<i>Excel .....</i>	<i>305</i>
<i>SharePoint .....</i>	<i>306</i>

How to integrate SharePoint with Power Apps .....	307
SharePoint lists customization with Power Apps .....	311
Customize the SharePoint list form in Power Apps .....	313
<i>Power Apps Add icon to SharePoint list Customization form .....</i>	<i>314</i>
<i>Customize the SharePoint list form in Power Apps using conditional formatting .....</i>	<i>315</i>
<i>Publish the custom list form in SharePoint via Power Apps .....</i>	<i>315</i>
<i>How the customization form looks in SharePoint List .....</i>	<i>316</i>
How to work with Power Apps form using SharePoint Data .....	317
Welcome Screen .....	318
Main Screen .....	319
Refresh .....	320
Submit .....	321
Success Screen .....	321
Details Screen .....	323
Working with Power Apps Gallery Control .....	326
Connect and use SharePoint with Power Apps Gallery Control .....	327
Working with Power Apps button .....	334
PowerApps button update SharePoint List item (for single line of text data type column) .....	334
Power Apps button update SharePoint List item (for choice data type column) .....	337
Save, Publish, and Preview Power Apps .....	338
Save Power Apps .....	338
Publish Power Apps .....	340
Preview Power Apps .....	340
Share Power Apps with other members .....	341
What is SharePoint Power Apps Delegation .....	343
Conclusion .....	344
Points to remember .....	345
<b>9. Power Automate .....</b>	<b>347</b>
Introduction .....	347

Structure .....	347
Objectives .....	348
Introduction to Power Automate.....	348
Advantages of Power Automate.....	349
Licensing and pricing in Power Automate.....	350
<i>Free License</i> .....	350
<i>License by per user (with unattended RPA)</i> .....	350
<i>License by per user (with attended RPA)</i> .....	350
<i>License by the per-flow plan</i> .....	351
Getting started with Power Automate.....	351
What is flow? .....	352
Different types of flows available in Power Automate.....	352
Templates available in Power Automate .....	353
Various connectors in Power Automate .....	354
Triggers available in Power Automate.....	355
<i>Types of Power Automate triggers</i> .....	355
Actions available in Power Automate.....	356
Creating a Power Automate flow using SharePoint .....	357
Creating a manual trigger flow within Power Automate .....	360
Creating a scheduled flow within Power Automate.....	362
Sharing a flow with another user .....	365
Export and import Power Automate flow.....	365
<i>Exporting a Power Automate flow</i> .....	366
<i>Importing a Power Automate flow</i> .....	366
Turn On/ Turn Off a flow .....	368
Deleting a flow .....	368
Power Automate with SharePoint (Examples) .....	369
<i>Save attachment into SharePoint library based on condition via Power Automate</i> .....	369
<i>Working with Microsoft forms using Power Automate</i> .....	371
<i>Getting SharePoint list items using Power Automate</i> .....	375
<i>Post message when a SharePoint item is created via Power Automate</i> .....	378

Copy folder using Power Automate .....	380
Working with approvals using Power Automate.....	381
Use API to create SharePoint list via Power Automate.....	386
Converting file to PDF format and storing in Power Automate .....	387
Create task in Planner from SharePoint list using Power Automate .....	391
Trigger flow based on condition via Power Automate .....	394
Conclusion .....	396
Points to remember.....	396
<b>10. Power BI .....</b>	<b>399</b>
Introduction .....	399
Structure .....	399
Objectives .....	400
What is Power BI.....	400
Introduction to Power BI Desktop.....	401
How to install Power BI Desktop.....	402
UI of Power BI Desktop.....	402
Key features of Power BI.....	403
Various data sources in Power BI .....	404
Connecting to SharePoint data sources .....	405
Introduction to Power BI report .....	408
What is Power Query .....	409
Accessing Power Query Editor in Power BI .....	409
UI of Power Query Editor.....	410
Transforming the data using Power Query .....	411
Renaming the column name .....	411
Changing the data type .....	412
Replacing Values .....	413
Merging Columns .....	413
Splitting Column .....	414
Overview of visualization in Power BI .....	414
Bar chart .....	416

Area chart .....	417
Pie chart .....	417
Card .....	418
Table .....	418
Creating Power BI reports using SharePoint Online data source .....	419
What is Power BI Service .....	421
UI of Power BI service .....	422
What is workspace in Power BI .....	423
Publishing and sharing report in Power BI .....	423
Publishing the report.....	423
Sharing the report .....	425
Embedding Power BI report with SharePoint Online .....	426
Embedding Power BI report to SharePoint Online .....	427
Creating Power BI Dashboard .....	430
Steps for creating a Power BI Dashboard .....	431
How to automatically refresh SharePoint data in Power BI .....	432
Conclusion .....	435
Points to remember.....	435
<b>11. SharePoint Framework.....</b>	<b>437</b>
Introduction .....	437
Structure .....	437
Objectives .....	438
Introducing SharePoint framework.....	438
Key features of SharePoint Framework .....	439
Setting up SPFx development environment .....	439
Installing Code Editor .....	440
Installing Node.js .....	440
Installing SPFx development toolchain .....	441
Installing Gulp.....	442
Installing Yeoman .....	442
Creating your first client side SPFx webpart .....	443



<i>Test Client-side web part in SPFx local web server .....</i>	447
<i>Deploy SharePoint Framework client web part to SharePoint Online App catalog.....</i>	449
Web part properties and property pane .....	451
<i>Configure your SharePoint client-side web part with property pane and properties .....</i>	452
<i>Handling field changes in SPFx .....</i>	453
<i>Creating Property pane in SPFx .....</i>	453
Introduction to SharePoint Framework Extensions.....	460
<i>Application customizers.....</i>	460
<i>Creating Application customizer extensions in SPFx .....</i>	461
<i>Deploy Application customizer extension to SharePoint Online .....</i>	467
<i>Field customizer .....</i>	470
<i>Creating Field customizer in SPFx .....</i>	470
<i>Deploying the Field customizer solution in SharePoint .....</i>	479
Command sets .....	483
<i>Creating Command sets extension .....</i>	483
<i>Understand the code of List View Command set extension .....</i>	486
<i>Deploying the solution in SharePoint.....</i>	490
Form customizer .....	494
<i>Creating Form Customizer extension using SharePoint Framework.....</i>	494
<i>Understanding the code of Form Customizer extension.....</i>	497
<i>Adding editing capabilities to the form item.....</i>	500
<i>Deploying the solution in SharePoint .....</i>	507
Conclusion .....	510
<b>Index .....</b>	<b>511-520</b>



# 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:

<b>Microsoft 365 Family</b> <b>\$99.99/year</b>	<b>Microsoft 365 Personal</b> <b>\$69.99/year</b>
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. <sup>4</sup>	Works on PC, Mac, iPhone, iPad, and Android phones and tablets. <sup>4</sup>
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:

<b>Microsoft 365 Family</b> <b>\$9.99/month</b>	<b>Microsoft 365 Personal</b> <b>\$6.99/month</b>
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. <sup>4</sup>	Works on PC, Mac, iPhone, iPad, and Android phones and tablets. <sup>4</sup>
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,

<b>Microsoft 365 Business Basic</b> \$6.00 user/month	<b>Microsoft 365 Business Standard</b> \$12.50 user/month	<b>Microsoft 365 Business Premium</b> \$22.00 user/month	<b>Microsoft 365 Apps for business</b> \$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:

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