



LIVE WEBINAR



WED / FEB 9 2022 / 3:00PM - 4PM CEST

Working with Templates in Microsoft 365

Chirag Patel MVP, MCT Speaker Microsoft 365 Consultant, Patel Consulting

ESPG WEBINAR SERIES
SUPPORTED BY:

dox42
automate your documents
integrate your data

pointfire
Multilingual SharePoint



Chirag Patel @techchirag

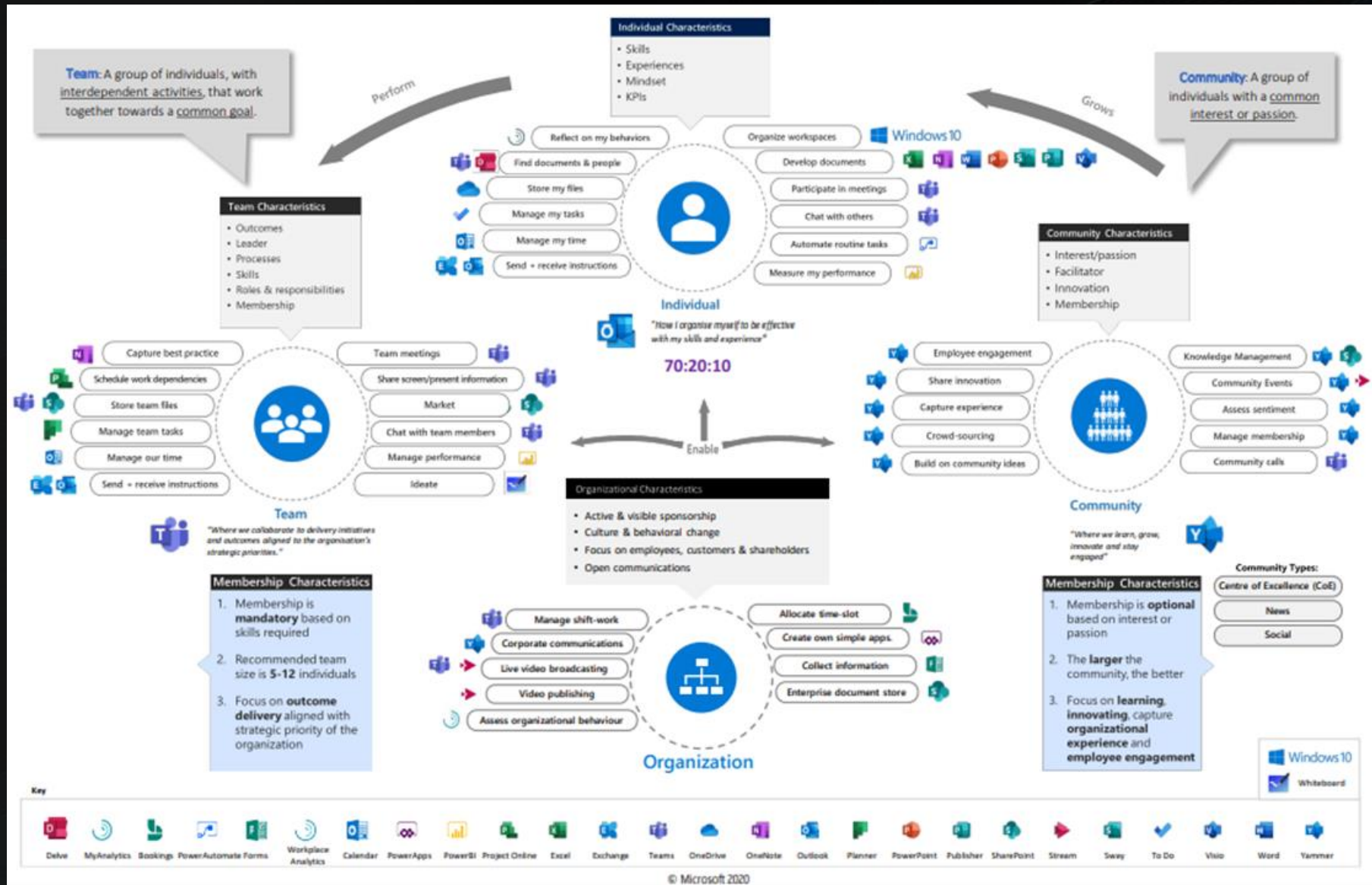
Microsoft 365 Consultant

Patel Consulting

- *M365UK organiser & community speaker*
- *Microsoft 365 Administrator, Architect, Trainer*
- *Deployment, Migrations, Implementations*
- *BCS Approved Chartered Membership Assessor*
- *techchirag.com*

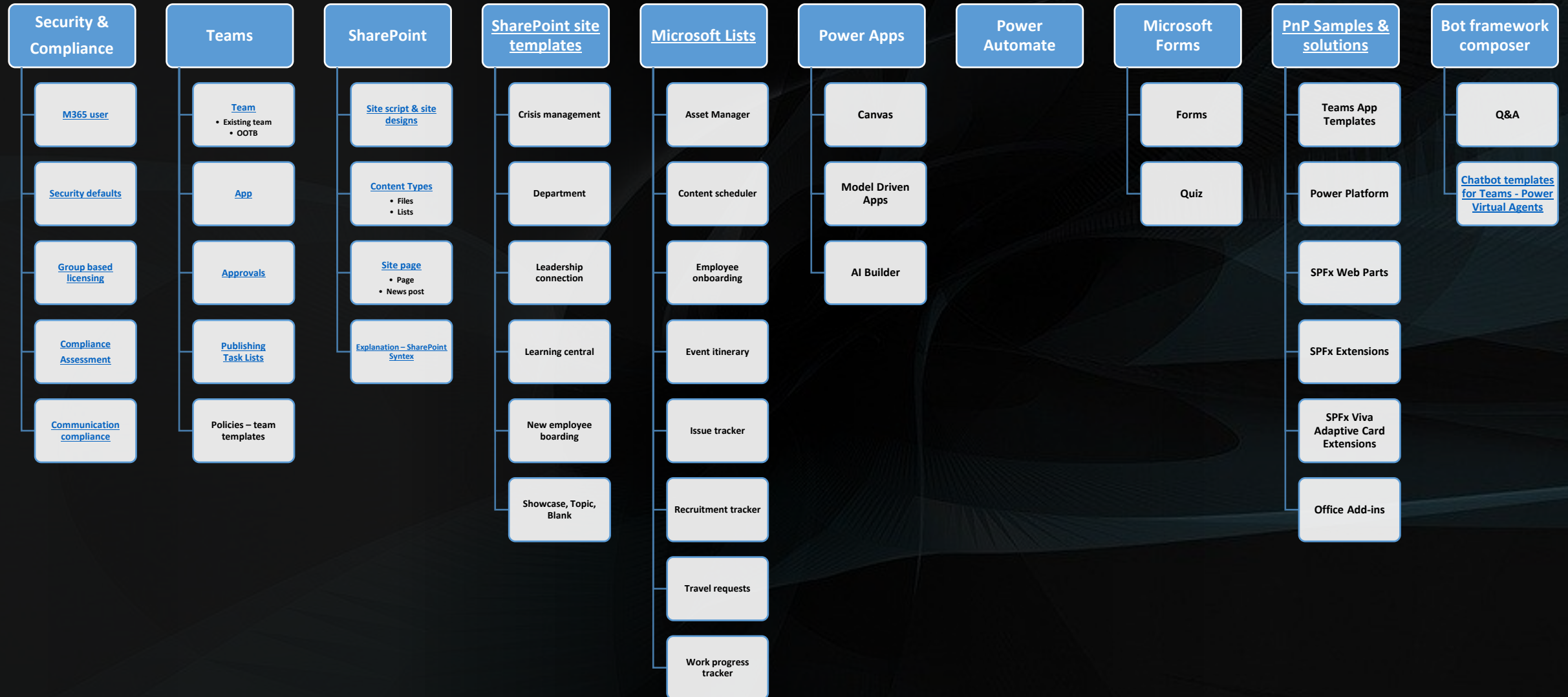


Individual, Team, Organisational Productivity



Enabling Modern Collaboration –
Microsoft Adoption

Templates everywhere Microsoft 365!



Themes and Site Templates

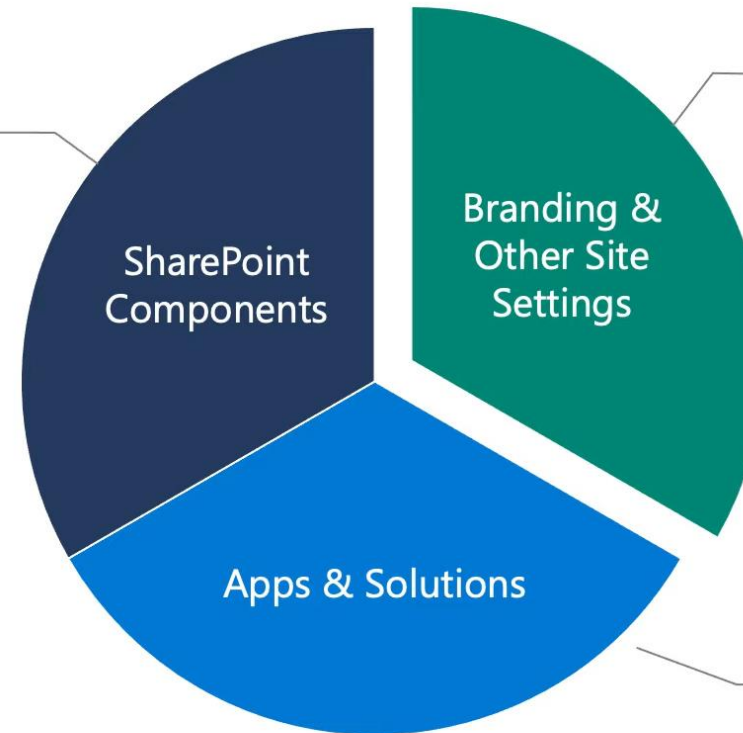
Create site designs to provide

- reusable lists,
- themes, layouts, pages,
- custom actions

Site script actions

SharePoint Components

- createSPList
- addSPField
- deleteSPField
- addSPFieldXml
- createSiteColumn
- createSiteColumnXml
 - Global Taxonomy
- addSiteColumn
- addContentType
- createContentType
- removeContentType
- addSPView
- removeSPView
- setSPFieldCustomFormatter
- addFolder
- addFile
- setDocumentTemplates
- setSiteLogoFromFile



Settings

- addPrincipalToSPGroup
- addNavLink (QL, Hub, footer)
- removeNavLink (QL, Hub, footer)
- applyTheme
- setSiteLogo
- setSiteBranding
 - Header layout
 - Header Background
 - Navigation Style
 - Footer Visibility
- setRegionalSettings
- setSiteExternalSharingCapability
- triggerFlow
- joinHubSite
- activateSPFeature

Register Solutions:

- installSolution
- SPFx Extension support
 - associateExtension
 - associateListViewCommandSet
 - associateFieldCustomizer

<https://docs.microsoft.com/en-us/sharepoint/dev/declarative-customization/site-theming/sharepoint-site-theming-overview>

<https://docs.microsoft.com/en-us/sharepoint/dev/declarative-customization/site-design-overview>

Creating List Templates

```
Connect-SPOService -Url https://m365x011743-admin.sharepoint.com -Credential  
admin@m365x011743.onmicrosoft.com
```

```
$extracted = Get-SPOSiteScriptFromList -ListUrl  
"https://m365x011743.sharepoint.com/sites/Mark8ProjectTeam/Lists/Risk%20and%20Issues"
```

```
Add-SPOSiteScript -Title "MyCo Risk Issues" -Description "This creates a risk and issues list" -Content  
$extracted
```

```
Add-SPOListDesign -Title "MyCo Risk Issues" -Description "Tracks risks & issues in a list" -SiteScripts  
"d80554f3-6035-459c-823d-da7e02d7f07d" -ListColor Orange -ListIcon BullseyeTarget -Thumbnail  
"https://m365x011743.sharepoint.com/Shared%20Documents/Demo%20images/MyCo192x192.png"
```

```
# https://docs.microsoft.com/en-us/sharepoint/lists-custom-template
```

SharePoint site template (site script)

```
$site_script = '  
{  
  "$schema": "schema.json",  
  "actions": [  
    {  
      "verb": "createSPList",  
      "listName": "Customer Tracking",  
      "templateType": 100,  
      "subactions": [  
        {  
          "verb": "setDescription",  
          "description": "List of Customers and Orders"  
        },  
        {  
          "verb": "addSPField",  
          "fieldType": "Text",  
          "displayName": "Customer Name",  
          "isRequired": false,  
          "addToDefaultView": true  
        }  
      ],  
    }  
  ],  
  "bindata": { },  
  "version": 1  
}
```

```
{  
  "verb": "addSPField",  
  "fieldType": "Number",  
  "displayName": "Requisition Total",  
  "addToDefaultView": true,  
  "isRequired": true  
},  
{  
  "verb": "addSPField",  
  "fieldType": "User",  
  "displayName": "Contact",  
  "addToDefaultView": true,  
  "isRequired": true  
},  
{  
  "verb": "addSPField",  
  "fieldType": "Note",  
  "displayName": "Meeting Notes",  
  "isRequired": false  
}  
]  
},  
"bindata": { },  
"version": 1  
}
```

SharePoint site template (site design)

```
Add-SPOSiteScript -Title "Create customer tracking list" -Content $site_script -  
Description "Creates list for tracking customer contact information"
```

```
Add-SPOSiteDesign -Title "MyCo customer tracking" -WebTemplate "64" -SiteScripts  
"88ede0cc-7c7a-4b08-845c-64c23c22ff68" -Description "Tracks key customer data in  
a list"
```

```
# https://docs.microsoft.com/en-us/sharepoint/dev/declarative-  
customization/get-started-create-site-design
```


Microsoft Teams App Templates

- Adoption Tool- Champion Management Platform
- Adoption Tool- Microsoft 365 Learning Pathways
- Company Communicator
- Co-worker Appreciation
- FAQ Plus
- Icebreaker
- New Employee Onboarding
- [App Template Code Samples](#)

- Solution Overview
- Deployment Guides
- Integration to other service dependencies
 - Pre-requisites & Troubleshooting

<https://docs.microsoft.com/en-us/microsoftteams/platform/samples/app-templates>

M365 – Add user

Add user template

Description

Basics

Licenses

Optional settings

Finish

Set up your template

User templates allow you to quickly add new users with a saved configuration. To get started, fill out some basic information about the template you're creating.

Name your template *

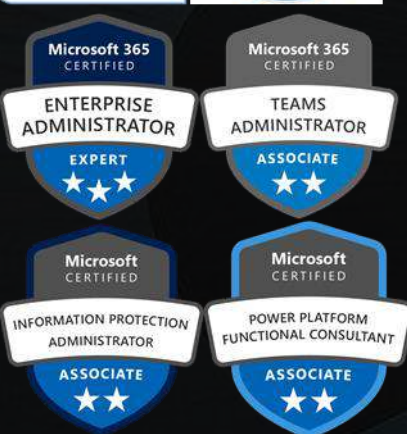
Ex: FTE Senior Engineer, New York *

Add a description (recommended)

Ex: Template for full-time senior engineers in New York office

Publish this template

☒ Make this template available to other admins who manage users.
If you want to un-publish a template, delete it. You can't change a template to private after it is published.



Thank You! techchirag.com



ESPC22 Webinar – 09 Feb 2022