

SharePoint User Guide

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Introduction

Overview of SharePoint

Microsoft SharePoint is a powerful collaboration and document management platform designed to help organisations share and manage content, knowledge, and applications. By facilitating seamless collaboration, SharePoint enhances productivity and streamlines business processes.

Some of the key features of SharePoint include:

- **Document Management:** Store, organise, and manage files with version control and real-time collaboration.
- **Collaboration:** Share documents, collaborate on projects, and communicate through integrated tools.
- **Content Management:** Create and manage websites, pages, and content for various purposes.
- **Workflow Automation:** Automate business processes using built-in workflows or custom solutions.

Benefits of Using SharePoint

SharePoint offers numerous benefits for organisations of all sizes:

- **Enhanced Collaboration:** Teams can work together on documents and projects from anywhere, fostering better communication and teamwork.
- **Centralised Information:** Store and organise all documents, data, and content in a single, easily accessible location.
- **Improved Productivity:** Automate routine tasks and streamline workflows to save time and reduce manual efforts.
- **Secure Data Management:** Robust security features ensure that sensitive information is protected and access is controlled.
- **Customisable Solutions:** Tailor SharePoint to meet specific business needs with customisable sites, libraries, and workflows.

SharePoint Terminology and Key Concepts

Understanding the key concepts and terminology in SharePoint is essential for effective use of the platform. Here are some important terms:

- **Site:** A SharePoint site is a container for various types of content, including documents, lists, and pages. Sites can be customised for different purposes, such as team collaboration or information sharing.
- **Library:** A document library is a specialised list for storing and managing documents. It provides features like version control, metadata, and check-in/check-out.
- **List:** A list is a collection of data organised in rows and columns, similar to a spreadsheet. Lists can be used to manage tasks, contacts, events, and other types of information.
- **Web Part:** A web part is a modular unit of information that can be added to a SharePoint page. Examples include text, images, documents, and calendars.
- **Metadata:** Metadata refers to data about data. In SharePoint, metadata is used to describe and categorise documents and list items, making it easier to organise and search for content.
- **Content Type:** A content type is a reusable collection of metadata, workflow, behavior, and other settings for a specific type of content. Content types help standardise and streamline the creation and management of content.
- **Permissions:** Permissions control who can access and interact with content on a SharePoint site. Permissions can be assigned at various levels, including sites, libraries, folders, and individual items.
- **Workflow:** A workflow is a sequence of automated steps that perform specific actions, such as approving documents or notifying team members. Workflows help automate business processes and ensure consistency.

By familiarising yourself with these concepts, you'll have a solid foundation for using SharePoint effectively and making the most of its capabilities.

Getting Started with SharePoint

Accessing SharePoint

To begin using SharePoint, follow these steps to access the platform:

- Via Web Browser:
 - Open your preferred web browser.
 - Enter the URL provided by your organisation (e.g., <https://yourcompany.sharepoint.com>).
 - Sign in using your organisational credentials (usually your work email and password).
- Via Microsoft 365:
 - Go to the Microsoft 365 portal (<https://portal.office.com>).
 - Sign in with your organisational credentials.
 - Click on the SharePoint icon from the list of available apps.

Navigating the SharePoint Interface

Once you're logged in, you'll see the SharePoint homepage, which serves as a central hub for accessing your sites and content. Here's an overview of the main elements you'll encounter:

- **Navigation Bar:** Located at the top of the page, it provides links to your frequently accessed sites, the home button, and the app launcher.
- **Search Bar:** Use this to quickly find sites, documents, people, and other content within SharePoint.
- **Site Navigation:** Typically on the left side, this menu helps you navigate through different sections of your site, such as document libraries, lists, and pages.
- **Content Area:** The main part of the page where you view and interact with content.

Site Basics

Creating a SharePoint Site

Creating a new SharePoint site is the first step in organising your content and collaborating with your team. Here's a step-by-step guide:

Access SharePoint:

- Log in to your Microsoft 365 account.
- Click on the App Launcher (grid icon) in the top left corner.
- Select SharePoint from the list of applications.

Create a New Site:

- On the SharePoint homepage, click on Create site.
- Choose between two types of sites: Team site or Communication site.
 - Team Site: Ideal for collaboration within a team. It includes features like document libraries, task lists, and shared calendars.
 - Communication Site: Designed for sharing information broadly within your business. It focuses on news, announcements, and engaging content.

Configure Site Settings:

- Site Name: Enter a name for your site. This name will appear in the URL.
- Description: Provide a brief description of the site's purpose.
- Privacy Settings: Choose whether the site will be private (only accessible to members) or public (accessible to everyone in the organisation).
- Group Email: For Team sites, you can create a Microsoft 365 group to facilitate communication and calendar sharing.

Finish and Create:

- Click Finish to create your site. SharePoint will set up the site and take you to the site's homepage.

Site Settings and Configurations

Once your site is created, you can customise it to better suit your needs:

Access Site Settings:

- Click on the gear icon in the top right corner of your site.
- Select Site information or Site settings from the dropdown menu.

Basic Site Settings:

- **Site Name and Description:** Edit the site name and description to reflect any changes in the site's purpose.
- **Privacy Settings:** Adjust the site's privacy settings if needed.
- **Site Logo:** Upload a logo to personalise your site.

Advanced Settings:

- **Regional Settings:** Configure the locale, time zone, and language settings for your site.
- **Permissions:** Manage who has access to your site and what they can do. You can add users, create groups, and assign permissions.
- **Navigation:** Customise the site navigation to make it easy for users to find important content. You can add, remove, and rearrange links in the navigation menu.

Site Collection Features:

- Enable or disable features that are available at the site collection level. Examples include the SharePoint Server Publishing Infrastructure, which adds publishing capabilities, and the Document ID service, which assigns unique IDs to documents.

Customising the Home Page

The home page of your site is the first thing users see, so it's important to make it informative and engaging:

- Edit the Page:
 - Click on the Edit button at the top right of the page.

- Add Web Parts:
 - Use the + button to add web parts to your page. Common web parts include:
 - Text: Add and format text.
 - Image: Insert images from your computer or a URL.
 - Document Library: Display a document library directly on the page.
 - News: Share news and updates with your team.
 - Events: Show upcoming events and important dates.

- Customise Layout:
 - Use section layouts to organise your content. You can choose from different column configurations to structure your page.

- Save and Publish:
 - Once you've added and configured your web parts, click Save as draft to save your changes without publishing them.
 - When you're ready for everyone to see the updates, click Publish.

Site Navigation

Effective navigation helps users find content quickly and easily. Customise your site's navigation to enhance usability:

Edit Navigation Links:

- Click on the Edit button in the left-hand navigation menu.

Add Links:

- Click + New link to add new links to important pages, document libraries, or external websites.

Rearrange Links:

- Drag and drop links to rearrange them in the order that makes the most sense for your users.

Create Sub-links:

- Organise links into a hierarchy by creating sub-links under main navigation links. This is useful for grouping related content together.

Working with Documents

Uploading Documents

Uploading documents to SharePoint allows you to store and manage files in a centralised location, making collaboration easier. Here's how to upload documents:

Via Drag and Drop:

- Navigate to the document library where you want to upload the file.
- Open your file explorer and select the file(s) you wish to upload.
- Drag the file(s) from your file explorer and drop them into the document library.

Via Upload Button:

- Open the document library.
- Click on the Upload button.
- Select Files or Folder from the dropdown menu.
- Browse to the location of the file(s) or folder on your computer and select them.
- Click Open to upload.

Creating New Documents

You can create new documents directly within SharePoint, which are automatically saved in the document library:

Create a New Document:

- Navigate to the desired document library.
- Click on the New button.
- Select the type of document you want to create (e.g., Word document, Excel workbook, PowerPoint presentation).

Edit and Save:

- The document opens in the relevant Office application (either in the browser or desktop app, depending on your settings).
- Make your changes and they will be automatically saved to the document library.

Document Libraries and Folder Structures

Organising your documents in libraries and folders helps keep content structured and easily accessible:

Create a Document Library:

- Go to the site where you want to add the library.
- Click on the Settings icon and select Site contents.
- Click New and then Document library.
- Enter a name and description for the library and click Create.

Create Folders:

- Open the document library.
- Click on the New button and select Folder.
- Enter a name for the folder and click Create.

Organise Documents:

- Move documents into the appropriate folders by dragging and dropping them or using the Move to option in the document library.

Version Control and Document History

Version control in SharePoint allows you to keep track of changes made to documents and revert to previous versions if necessary:

View Version History:

- Navigate to the document library.
- Click on the ellipsis (...) next to the document you're interested in.
- Select Version history.

Restore a Previous Version:

- In the version history panel, find the version you want to restore.
- Click the dropdown arrow next to the version number and select Restore.
- Confirm that you want to restore the version.

Delete Versions:

- In the version history panel, click the dropdown arrow next to the version you want to delete.
- Select Delete.

Checking Out and Checking In Documents

Checking out documents ensures that only one person can edit the document at a time, preventing conflicting changes:

Check Out a Document:

- Navigate to the document library.
- Click on the ellipsis (...) next to the document you want to check out.
- Select More and then Check out.
- The document is now checked out to you, and other users can only view it in read-only mode.

Check In a Document:

- After editing the document, navigate back to the document library.
- Click on the ellipsis (...) next to the document.
- Select More and then Check in.
- Enter any comments about the changes you made (optional) and click OK.

Discard Check Out:

- If you decide not to make any changes, you can discard the check-out.
- Click on the ellipsis (...) next to the document.
- Select More and then Discard check out.

Co-authoring and Real-time Collaboration

SharePoint supports co-authoring, allowing multiple users to work on a document simultaneously:

Open the Document:

- Navigate to the document library and open the document in the browser or desktop app.
- Ensure that the document is shared with colleagues who need to collaborate.

Collaborate in Real-time:

- As others open the document, you'll see their presence and can see changes as they happen in real-time.
- Use comments and chat (available in some Office applications) to communicate within the document.

Save Changes:

- Changes are automatically saved when working in the browser or desktop apps.
- Version history will track all edits made by collaborators.

By mastering these document management features, you can leverage SharePoint to its full potential, ensuring efficient and secure collaboration within your team or organisation.

Lists and Libraries

Creating and Managing Lists

Lists in SharePoint are collections of data that you can share and collaborate on with your team. They are similar to tables in a database or rows and columns in a spreadsheet. Here's how to create and manage lists:

Create a New List:

- Navigate to the site where you want to create the list.
- Click on the Settings icon and select Site contents.
- Click on New and then select List.
- Choose to create a new list or select from existing templates (like Contacts, Tasks, or Custom list).
- Enter a name and, optionally, a description for the list.
- Click Create.

Add Items to the List:

- Open the list you created.
- Click on New to add a new item.
- Fill in the fields in the form that appears and click Save.

Edit List Items:

- Click on the item you want to edit.
- Make your changes in the form that appears.
- Click Save to update the item.

Delete List Items:

- Select the item(s) you want to delete by checking the box next to each item.
- Click on the Delete button and confirm the deletion.

Customising Columns and Views

Customising columns and views helps you display the data in your list in a way that best suits your needs.

Add and Customise Columns:

- Open the list.
- Click on the + Add column button.
- Choose the type of column you want to add (e.g., Single line of text, Number, Date and Time, Choice, etc.).
- Enter a name for the column and configure any additional settings.
- Click Save.

Modify Existing Columns:

- Open the list.
- Click on the column header you want to modify.
- Select Column settings and then Edit.
- Make the necessary changes and click Save.

Create and Manage Views:

- Open the list.
- Click on the All items dropdown menu at the top right of the list.
- Select Create new view.
- Choose a view type (e.g., Standard view, Datasheet view, Calendar view).
- Configure the view settings, such as which columns to display and in what order.
- Click Save to create the view.
- To manage existing views, select Manage views from the dropdown menu, make your changes, and click Save.

Using Filters and Sorting

Filters and sorting allow you to quickly find and organise list items.

Apply Filters:

- Open the list.
- Click on the column header for the column you want to filter.
- Select Filter by and choose the criteria you want to filter by.
- The list will display only the items that match the filter criteria.

Sort Items:

- Click on the column header for the column you want to sort.
- Select Sort A to Z or Sort Z to A.
- The list will be sorted based on the selected column.

Library Settings and Permissions

Library settings and permissions help you control how documents are managed and who can access them.

Access Library Settings:

- Navigate to the document library.
- Click on the Settings icon and select Library settings.

Configure General Settings:

- Name and Description: Edit the library name and description.
- Versioning Settings: Configure versioning to track changes to documents. You can enable major and minor versions, require check-out, and specify the number of versions to retain.
- Advanced Settings: Configure settings such as allowing content types, enabling folder creation, and specifying offline client availability.

Manage Library Permissions:

- Navigate to the document library.
- Click on the Settings icon and select Library settings.
- Click on Permissions for this document library.
- By default, libraries inherit permissions from the parent site. To customise permissions, click on Stop Inheriting Permissions.
- Add or remove users and groups, and assign appropriate permission levels (e.g., Read, Contribute, Edit, Full Control).

Content Types and Metadata:

- Content Types: Enable and manage multiple content types within a single library to handle different types of documents. Go to Library settings, select Advanced settings, and enable content types.
- Metadata: Use metadata to categorise and tag documents, making it easier to organise and search for content. Add metadata columns in the library settings and configure them as needed.

Using Views to Display List Data

Creating and managing views in SharePoint lists allows you to display data in a way that makes sense for different scenarios or user needs.

Create a View:

- Open the list.
- Click on the All items dropdown and select Create new view.
- Choose the view format: Standard, Datasheet, Calendar, or Gantt.
- Name the view and select which columns to display.

Customise the View:

- Set sorting and filtering options.
- Group items by specific columns if necessary.
- Set item limits for the number of items displayed.
- Apply conditional formatting to highlight important data.

Save the View:

- Click Save to create the new view. You can switch between views using the view dropdown menu.

Advanced List and Library Features

Advanced features in SharePoint lists and libraries can enhance their functionality and integration with other systems.

Integrate with Power Automate:

- Automate workflows by creating flows with Power Automate.
- Example: Automatically send an email when a new item is added to a list.
- Navigate to the list or library, click on the Automate button, and choose Create a flow.

Use Power Apps:

- Create custom forms and applications to interact with list data.
- Click on the Power Apps button in the list toolbar and select Customise forms to design a custom form.

Configure Alerts:

- Set up alerts to notify you of changes in a list or library.
- Click on the Alert Me button and configure the alert settings (e.g., send notifications when items are added, modified, or deleted).

By mastering lists and libraries in SharePoint, you can efficiently organise, manage, and collaborate on various types of information, enhancing productivity and data management within your team or organisation.

Permissions and Sharing

Understanding Permissions in SharePoint

Permissions in SharePoint are essential for controlling access to sites, libraries, and documents. They help ensure that sensitive information is protected and that users can only access content relevant to their roles. SharePoint uses a hierarchical permissions model, which allows for granular control over access.

Permission Levels:

- **Full Control:** Complete access to all settings and content. Usually reserved for site owners.
- **Edit:** Allows users to add, edit, and delete lists, libraries, and items.
- **Contribute:** Users can add, edit, and delete items in existing lists and document libraries.
- **Read:** Users can view pages and items in lists and document libraries but cannot make changes.
- **Custom:** Customised permission levels tailored to specific needs.

Inheritance:

- SharePoint sites, lists, libraries, and items inherit permissions from their parent by default. This means that permissions set at the site level apply to all subsites, lists, libraries, and items within that site unless inheritance is broken.
- You can stop inheriting permissions at any level to customise access.

Managing Permissions

Access Site Permissions:

- Navigate to the site where you want to manage permissions.
- Click on the Settings icon and select Site permissions.

Grant Permissions:

- Click on Invite people or Grant permissions.
- Enter the names or email addresses of the users or groups you want to add.
- Select the appropriate permission level.
- Click Share or Add to grant access.

Modify Permissions:

- In the Site permissions page, click on the user or group whose permissions you want to modify.
- Change their permission level by selecting a different option from the dropdown menu.

Break Inheritance:

- To stop inheriting permissions, navigate to the library, list, or item.
- Click on Settings, then Library settings or List settings.
- Select Permissions for this document library or Permissions for this list.
- Click Stop Inheriting Permissions and confirm.

Remove Permissions:

- On the permissions page, select the user or group you want to remove.
- Click on Remove User Permissions.

Sharing Content

Share a Site:

- Navigate to the site you want to share.
- Click on the Settings icon and select Site permissions.
- Click on Invite people and choose Share site only.
- Enter the names or email addresses of the users you want to invite.
- Select the appropriate permission level and click Share.

Share a Document or Folder:

- Navigate to the document library.
- Select the document or folder you want to share.
- Click on the Share button or right-click and select Share.
- Enter the names or email addresses of the people you want to share with.
- Choose the permission level (Can view or Can edit).
- Optionally, add a message.
- Click Send.

Sharing Links:

- You can generate sharing links to provide access to documents or folders.
- Select the document or folder and click on the Share button.
- Click on Copy link.
- Configure the link settings (e.g., anyone with the link, people in your organisation, specific people).
- Copy the generated link and share it via email or other communication tools.

Advanced Sharing Options

External Sharing:

- SharePoint allows sharing content with users outside your organisation.
- Navigate to the document or folder you want to share.
- Click on Share, then Copy link.
- Ensure the link settings allow external access (e.g., Anyone with the link).
- Copy the link and share it with external users.

Manage Access:

- To manage who has access to a document or folder, select the item and click on Share.
- Click on Shared with to see a list of users and their permission levels.
- To change permissions or stop sharing, click on the user's name and select the appropriate option.

Expiration and Password Protection:

- For added security, you can set expiration dates and password-protect sharing links.
- When generating a sharing link, configure the link settings to include an expiration date or require a password.

Auditing and Monitoring Permissions

View Permissions:

- To see who has access to a site, library, or document, navigate to the item.
- Click on Share or Permissions, then Advanced to view detailed permissions.

Permission Reporting:

- SharePoint provides reporting tools to audit permissions and access.
- Use the Site Settings to access Site Collection Administration and view Site collection audit settings.
- Configure auditing to track access and changes to documents and items.

By understanding and effectively managing permissions and sharing options in SharePoint, you can ensure that your content is secure, accessible to the right people, and compliant with your organisation's policies. This helps maintain a collaborative environment while protecting sensitive information.

Using SharePoint for Collaboration

Team Sites and Collaboration

SharePoint Team Sites are designed to facilitate collaboration within teams by providing a centralised space for document management, communication, and project coordination.

Create a Team Site:

- Navigate to the SharePoint home page.
- Click on Create site and select Team site.
- Enter a site name, description, and privacy settings (public or private).
- Add team members and assign roles.
- Click Finish to create the site.

Site Features for Collaboration:

- Document Libraries: Store and manage project documents. Team members can upload, edit, and share documents.
- Lists: Track tasks, issues, or project milestones using customisable lists.
- Calendars: Schedule meetings, deadlines, and events. Integrate with Outlook for seamless scheduling.
- Discussion Boards: Foster team communication by creating discussion threads.
- Notebooks: Use OneNote notebooks to take and share notes collaboratively.

Document Co-authoring

SharePoint supports real-time document co-authoring, allowing multiple users to work on a document simultaneously.

Open a Document for Co-authoring:

- Navigate to the document library.
- Click on the document to open it in the browser or the Office application.
- If other team members open the document at the same time, their presence will be indicated.

Real-time Editing:

- Each co-author's changes are highlighted in different colors.
- Changes are saved automatically, and you can see updates in real time.
- Use the comments feature to discuss changes and leave feedback.

Version History:

- SharePoint tracks all changes made to documents.
- Access version history by clicking on the ellipsis (...) next to the document and selecting Version history.
- Restore previous versions if needed.

Integrating with Microsoft Teams

Microsoft Teams integrates seamlessly with SharePoint, enhancing collaboration through chat, video conferencing, and file sharing.

Connect a SharePoint Site to Teams:

- In Microsoft Teams, navigate to the desired team or create a new one.
- Click on the Files tab.
- Select Open in SharePoint to link the SharePoint document library to Teams.

Share and Collaborate on Files in Teams:

- Use the Files tab in Teams to access and edit documents stored in SharePoint.
- Share files in chat or channels by clicking the Attach button and selecting from SharePoint.
- Co-author documents directly within Teams.

Use Teams Channels for Communication:

- Create channels for different projects or topics within a team.
- Use the Posts tab for discussions, announcements, and updates.
- Schedule and join meetings, and use the calendar for project deadlines and events.

Task Management with Microsoft Planner

Microsoft Planner integrates with SharePoint to provide task management capabilities for project teams.

Create a Plan in Planner:

- Navigate to the SharePoint team site.
- Click on Planner in the site navigation or add it as a web part.
- Create a new plan or use an existing one.

Assign and Track Tasks:

- Add tasks to the plan and assign them to team members.
- Set due dates, priorities, and add descriptions.
- Track task progress using visual boards and charts.

Integrate Planner with SharePoint:

- Embed Planner boards in SharePoint pages using the Planner web part.
- Sync tasks and updates between SharePoint and Planner for cohesive project management.

Utilising Communication Sites

SharePoint Communication Sites are designed to share information broadly across the business.

Create a Communication Site:

- Navigate to the SharePoint home page.
- Click on Create site and select Communication site.
- Choose a layout (e.g., Topic, Showcase, Blank).
- Enter a site name and description, and click Finish.

Design and Customise the Site:

- Use the built-in page editor to add web parts such as text, images, videos, and links.
- Create engaging pages for news, announcements, and resources.
- Customise the layout and branding to align with your business's identity.

Share Information and Engage Users:

- Post news articles and updates to keep the organisation informed.
- Use web parts like the Hero web part to highlight important content.
- Enable comments and likes to encourage feedback and engagement.

Using SharePoint for Project Management

SharePoint offers robust tools for managing projects, including task tracking, document management, and collaboration features.

Create a Project Site:

- Use a SharePoint team site template tailored for project management.
- Configure document libraries, lists, and calendars specific to the project.

Track Project Tasks and Milestones:

- Use task lists to assign and monitor project tasks.
- Set up alerts and notifications to stay updated on task progress.
- Integrate with Microsoft Project for advanced project management features.

Collaborate on Project Documents:

- Store all project-related documents in a dedicated document library.
- Use co-authoring and version control to manage document changes.
- Organise documents in folders or libraries for easy access.

Monitor Project Progress:

- Create dashboards and reports using Power BI to visualise project data.
- Embed Power BI reports in SharePoint pages for real-time insights.
- Use the Site Notebook for collaborative note-taking and brainstorming sessions.

Best Practices for Effective Collaboration

Set Clear Permissions and Access Control:

- Ensure that team members have the appropriate level of access.
- Regularly review permissions to maintain security.

Establish Communication Channels:

- Use Microsoft Teams for real-time communication and collaboration.
- Schedule regular meetings and updates to keep everyone informed.

Maintain Document Organisation:

- Use consistent naming conventions and folder structures.
- Regularly archive or delete outdated documents.

Encourage Collaboration and Feedback:

- Foster a collaborative culture by encouraging team members to share ideas and feedback.
- Use discussion boards and comments to facilitate communication.

Leverage Automation:

- Use Power Automate to automate repetitive tasks and workflows.
- Create alerts and notifications to stay updated on important changes.

By utilising SharePoint's collaboration features, teams can work together more effectively, manage projects efficiently, and ensure that everyone stays informed and engaged.

Search and Navigation

Search Functionality

Global Search:

- The global search bar is available at the top of any SharePoint page.
- Users can search across the entire SharePoint environment, including sites, document libraries, lists, and more.
- Start typing a keyword, and SharePoint will display suggestions based on recent searches, frequently accessed documents, or popular items.

Search Scopes:

- **All Sites:** Searches across all available SharePoint sites and content within your business.
- **This Site:** Limits the search to the current site you're navigating.
- **People:** Focuses the search on finding colleagues, their profiles, and contact information.
- **Documents:** Filters the search results to show only documents, spreadsheets, presentations, and other file types.
- **Images and Videos:** Filters the search results to show only media files, such as images and videos.

Search Query Syntax:

- **Keywords:** Simply type words related to what you're looking for. SharePoint will match these against document titles, metadata, and content.
- **Phrases:** Use quotes to search for an exact phrase (e.g., "annual report").
- **Operators:** Use AND, OR, and NOT to refine search queries (e.g., "budget AND forecast").
- **Property Searches:** Narrow down results by searching within specific properties (e.g., title:"Q1 presentation" or author:"John Doe").

Advanced Search Filters

Refiners:

- Refiners appear on the left side of the search results page and help narrow down search results by different criteria.
- Common refiners include file type, modified date, author, and site.
- Select one or more refiners to filter the results further and quickly find the content you need.

Search Result Filters:

- Use the options above the search results to sort and filter your results.
- Sort results by relevance, date modified, or other criteria.
- Filter results by document type, site, or author.

Promoted Results:

- Administrators can set up promoted results (also known as Best Bets) to ensure that specific content appears at the top of search results for certain queries.
- For example, a company policy document might be promoted for the search term "policy".

Custom Query Suggestions:

- SharePoint learns from user behavior to suggest queries based on popular searches and recent activities.
- Administrators can also configure custom query suggestions to help guide users to relevant content.

Navigating SharePoint Sites

Global Navigation:

- The global navigation menu, typically found at the top of a SharePoint site, provides links to major areas of the site or other related sites.
- It may include links to home pages, document libraries, lists, and other commonly accessed content.
- Administrators can customise the global navigation to reflect the structure and needs of the organisation.

Site Navigation:

- Each SharePoint site has its own navigation structure, usually displayed on the left-hand side of the page (known as the Quick Launch).
- The Quick Launch bar typically includes links to the home page, document libraries, lists, subsites, and other relevant content.
- Users can customise their site's navigation to organise content logically and make frequently used items easily accessible.

Hub Sites and Associated Sites:

- **Hub Sites:** Hub sites bring together multiple related sites under a common navigation structure, branding, and search scope.
- **Associated Sites:** These are sites that are connected to a hub site. They inherit the hub site's navigation and can share content and news across the hub.
- Users can navigate between associated sites using the hub site's navigation bar.

Breadcrumb Navigation:

- Breadcrumbs appear at the top of pages and show the user's current location within the site hierarchy.
- Users can click on breadcrumb links to navigate back to previous pages or higher levels of the site structure.

Top Links Bar:

- The Top Links Bar is another navigation element that can be configured to provide quick access to key areas of the site. It usually appears at the top of the site, beneath the site header, and can include links to subsites, document libraries, lists, or external URLs.

Customising Search and Navigation

Search Settings:

- Administrators can customise the search experience by configuring search settings at the site, site collection, or organisational level.
- **Result Sources:** Define specific content sources to be searched (e.g., only search within a particular document library or list).
- **Query Rules:** Set rules that modify the search behavior, such as boosting certain results or promoting content.
- **Search Schema:** Customise the search schema by defining managed properties and mapping them to crawled properties to ensure accurate search results.

Search Web Parts:

- Search Web Parts can be added to SharePoint pages to create customised search experiences.
- **Search Box:** Add a search box to any page to allow users to perform searches directly from that page.
- **Search Results:** Display search results in a customised format. You can filter and sort these results based on specific criteria.
- **Refinement:** Add a refinement panel to allow users to filter search results by various properties.

Navigation Settings:

- Customise site navigation to enhance user experience and ensure that important content is easily accessible.
- **Structural Navigation:** Organise links manually to reflect the structure of your site.
- **Managed Navigation:** Use metadata to dynamically generate navigation links based on content.
- **Term Store:** Utilise the Term Store for managed metadata navigation, allowing for consistent navigation across sites using taxonomy terms.

Integration with Other Microsoft 365 Apps

Teams Integration

Linking SharePoint Document Libraries to Teams:

- In Microsoft Teams, each channel is connected to a SharePoint document library. Files shared within the channel are automatically stored in this library.
- To access a SharePoint document library from Teams, go to the channel's **Files** tab and select **Open in SharePoint**. This will take you directly to the document library in SharePoint.
- You can pin important document libraries as tabs in Teams for quick access.

Collaborative Document Editing:

- Teams allows real-time co-authoring of documents stored in SharePoint. Multiple users can open and edit documents simultaneously, with changes reflected in real-time.
- Use the **Files** tab in Teams to access documents, or share files directly in chats or channels. These files are stored in the associated SharePoint library.

Sharing and Managing Content:

- SharePoint pages and news posts can be integrated into Teams channels as tabs, making it easy to share important updates or resources with your team.
- Use the + (Add a tab) button in Teams to embed SharePoint pages, document libraries, or lists directly within a Teams channel.

Notifications and Updates:

- Configure alerts in SharePoint to send notifications to Teams channels when documents are updated, or new items are added to lists or libraries.
- Use Power Automate to create workflows that trigger Teams notifications based on SharePoint activities, such as task assignments or document approvals.

OneDrive Integration

Syncing SharePoint Document Libraries to OneDrive:

- Users can sync SharePoint document libraries to their OneDrive for easy access to files on their local devices. This allows offline access to documents, with changes automatically synced when reconnected to the internet.
- To sync a library, navigate to the document library in SharePoint, click **Sync**, and follow the prompts to set up synchronisation in OneDrive.

Accessing Files from OneDrive:

- Files stored in SharePoint document libraries appear in the **Shared Libraries** section of OneDrive.
- Users can access these files via the OneDrive app on desktop or mobile, or through the OneDrive web interface.

Sharing and Collaboration:

- Share files directly from OneDrive, whether they are stored in OneDrive or in a SharePoint document library.
- Use OneDrive's sharing features to control access permissions, set expiration dates, and manage sharing links for files hosted on SharePoint.

Outlook Integration

Connecting SharePoint Calendars to Outlook:

- SharePoint site calendars can be connected to Outlook, allowing users to view and manage calendar events directly from their Outlook interface.
- To connect a SharePoint calendar, go to the calendar in SharePoint, click on the **Calendar** tab, and select **Connect to Outlook**. Follow the prompts to sync the calendar with Outlook.

Email Integration with SharePoint Lists and Libraries:

- Users can email content directly to SharePoint document libraries or lists that are configured to receive email.
- This is useful for automatically archiving emails and attachments in a SharePoint document library or for tracking correspondence related to a project in a SharePoint list.

Sharing SharePoint Content via Outlook:

- SharePoint documents and links can be easily shared via Outlook. When composing an email, use the **Attach** button, select **Browse cloud locations**, and navigate to the relevant SharePoint library.
- Outlook provides options to share documents as attachments or as links, with permission settings configurable directly within the email.

Task Management:

- SharePoint tasks can be synchronised with Outlook tasks. Users can view and manage their tasks across both platforms, ensuring consistency in task tracking and completion.

Power App Integration

Power Apps:

- Power Apps allows users to build custom applications that connect to SharePoint data. These apps can be used to create user-friendly interfaces for interacting with SharePoint lists and libraries.
- For example, a Power App can be designed to submit forms, track inventory, or manage approvals, with data stored and managed in SharePoint.
- Power Apps can be embedded directly in SharePoint pages or accessed through mobile devices, providing flexibility and accessibility.

Power Automate:

- Power Automate (formerly Microsoft Flow) enables automation of workflows that interact with SharePoint. This includes automating repetitive tasks, triggering actions based on SharePoint events, and integrating SharePoint with other apps.
- Common workflows include automatic document approval processes, notifications when new items are added to a list, and data synchronisation between SharePoint and other systems.
- Create flows directly from SharePoint lists or libraries by selecting **Automate > Power Automate** and choosing or creating a flow.

Power BI:

- Power BI allows for the creation of detailed reports and dashboards that visualise data stored in SharePoint lists or libraries.
- Users can embed Power BI reports in SharePoint pages to provide interactive and dynamic data insights to site visitors.
- Power BI's integration with SharePoint supports both direct queries to SharePoint lists and the ability to import data for more complex analysis.

Integration with Microsoft Excel and Word

1. Excel Integration:

- SharePoint lists can be exported to Excel for data analysis, reporting, and visualisation. Users can manipulate the data in Excel, then import changes back to SharePoint if needed.
- Excel files stored in SharePoint can be opened directly in Excel Online for real-time co-authoring or in the desktop version of Excel for advanced features.

2. Word Integration:

- Word documents stored in SharePoint can be accessed and edited directly within Word Online or the desktop app, allowing for seamless editing and collaboration.
- SharePoint document libraries often store templates for standardised documents, ensuring consistency across the organisation.

Integration with Microsoft Planner and To Do

Planner:

- Microsoft Planner integrates with SharePoint to provide task management and project planning capabilities. Teams can create and assign tasks, track progress, and collaborate on projects.
- SharePoint team sites can host Planner boards, allowing users to manage tasks directly from within the SharePoint site.

To Do:

- Microsoft To Do integrates with SharePoint tasks, allowing users to track their personal tasks alongside tasks assigned in SharePoint.
- Tasks from SharePoint can be viewed and managed in Microsoft To Do, ensuring a unified task management experience across platforms.

Administering and Managing SharePoint

SharePoint Site Collection Administration

1. Creating and Managing Site Collections:

○ Create a Site Collection:

- In the SharePoint Admin Center, navigate to **Sites > Active sites**.
- Click **Create** and choose **Private Site Collection** or **Team Site** based on your needs.
- Fill in the details, including site name, URL, and template. Assign a site collection administrator.
- Click **Finish** to create the site collection.

○ Manage Site Collections:

- View and manage site collections from the **Active sites** section in the SharePoint Admin Center.
- Perform tasks such as configuring storage quotas, setting site collection administrators, and managing site settings.

○ Site Collection Settings:

- Access site collection settings by going to the site's settings page.
- Configure site features, regional settings, and search settings.
- Manage the site's theme, logo, and other appearance settings.

2. Site Hierarchies and Navigation:

○ Organise Sites:

- Create a hierarchical structure of sites (parent and child sites) to reflect organisational or project structures.
- Use hub sites to unify related sites under a common navigation and branding.

○ Configure Navigation:

- Use the **Navigation** settings in site settings to add, remove, or reorganise links.

Managing Permissions and Access Control

1. Understanding SharePoint Permissions:

- SharePoint uses a role-based access control model with predefined permission levels such as Full Control, Design, Edit, Contribute, and Read.
- Permissions can be assigned at the site, library, list, or item level.

2. Configuring Permissions:

- **Site Permissions:**
 - Navigate to **Site Settings > Site permissions**.
 - Manage permissions by adding or removing users/groups and assigning permission levels.
- **Library and List Permissions:**
 - Go to the document library or list settings.
 - Click **Permissions for this document library** or **List permissions** to manage access for specific libraries or lists.
- **Unique Permissions:**
 - For more granular control, break inheritance from the parent site to assign unique permissions.
 - Click **Stop inheriting permissions** to customise permissions for a specific site, library, or list.

3. Managing User Groups:

- **Create and Manage Groups:**
 - Create custom SharePoint groups to manage user access more efficiently.
 - Go to **Site Settings > People and groups**, and click **Groups** to create or manage groups.
- **Assign Users to Groups:**
 - Add users to SharePoint groups based on their role or department.
 - This simplifies permission management by allowing you to manage access at the group level rather than individually.

4. External Sharing:

- Configure external sharing settings to control how users can share content with people outside the organisation.
- Set policies for sharing links, guest access, and external user invitations through the SharePoint Admin Center.

User Profiles and Personalisation

1. Managing User Profiles:

- **Access User Profiles:**
 - Go to the SharePoint Admin Center and select **User profiles**.
 - Manage profiles, including editing user details, job titles, and department information.
- **Configure Profile Properties:**
 - Define and manage profile properties that users can update, such as contact information and skills.
 - Set up profile synchronisation with Active Directory or other identity management systems.

2. User MySites:

- **MySite Configuration:**
 - MySites (personal sites) allow users to manage their personal content, such as documents and tasks.
 - Configure MySite settings through the SharePoint Admin Center, including storage quotas and user permissions.
- **User Personalisation:**
 - Encourage users to personalise their MySites with profile pictures, bios, and links to important resources.
 - Enable and configure the Delve feature for discovering and organising relevant content based on user interests.

Configuring SharePoint Settings

1. Site Settings:

- **Configure Site Features:**
 - Enable or disable site features, such as document collaboration tools, social features, and workflow settings.
 - Navigate to **Site Settings** > **Manage site features** to activate or deactivate features.
- **Regional Settings:**
 - Set regional settings for time zone, date formats, and language preferences to match the needs of your organisation.
- **Site Collection Settings:**
 - Manage site collection features, search settings, and content types through **Site Collection Settings**.

2. Search Configuration:

- **Search Settings:**
 - Configure search settings to customise how search results are displayed and indexed.
 - Go to the SharePoint Admin Center > **Search** to manage search schema, result sources, and query rules.
- **Content Sources:**
 - Define and manage content sources to control which content is crawled and indexed by SharePoint search.

3. Site Templates:

- **Create and Use Templates:**
 - Save site templates to standardise site creation and ensure consistency across different sites.
 - Go to **Site Settings** > **Save site as a template** to create a template from an existing site.
- **Apply Templates:**

- Use site templates when creating new sites to ensure they are pre-configured with the required structure and settings.

Compliance and Security

1. Compliance Center:

- **Access Compliance Center:**
 - Go to the Microsoft 365 Compliance Center to manage compliance and data governance settings for SharePoint.
 - Configure data loss prevention (DLP) policies, retention policies, and legal holds.
- **Monitor Compliance:**
 - Use the Compliance Center to review audit logs, compliance reports, and policy enforcement status.

2. Security Settings:

- **Configure Security Policies:**
 - Set security policies to protect SharePoint data from unauthorised access and data breaches.
 - Use Microsoft 365 security features such as encryption, multifactor authentication (MFA), and conditional access policies.
- **Monitor Security:**
 - Use the Microsoft 365 Security Center to monitor security incidents, review alerts, and manage threat protection.

3. Backup and Restore:

- **Backup SharePoint Data:**
 - Ensure regular backups of SharePoint data to protect against data loss. Microsoft 365 handles some level of data redundancy, but additional backup solutions may be required for critical data.
- **Restore Data:**
 - Use the SharePoint Admin Center to restore deleted sites, libraries, or lists.

- Configure versioning and recycle bins to recover deleted content or revert to previous versions.

Managing Storage and Performance

1. Monitor Storage Usage:

○ View Storage Metrics:

- Go to **Site Settings** > **Storage Metrics** to view storage usage for sites, libraries, and lists.
- Monitor storage consumption and manage quotas to prevent exceeding storage limits.

○ Manage Storage Quotas:

- Set and adjust storage quotas for site collections to control the amount of storage allocated to each site.

2. Optimise Performance:

○ Site Performance:

- Monitor site performance using tools like SharePoint Health Analyzer and Performance Monitor.
- Optimise site performance by regularly reviewing and managing site content, configurations, and customisations.

○ Network and Load Balancing:

- Ensure that network configurations and load balancing are optimised for SharePoint to handle high traffic and maintain performance.