

2021

SharePoint Power User Guide

This eBook is designed for people who are involved in rolling out SharePoint Online within their organisation. It covers the best use cases for various SharePoint sites, along with managing access to content on the sites for end users and 'external' third parties.

It also covers the most common approaches to document libraries and lists including Microsoft lists.

Contents

Introduction.....	3
Setting the scene	5
What SharePoint site should you start with?	5
Team site	6
What is an Office 365 group?	7
Permissions for your Team site.....	8
Communication site	11
Creating a Team site without an Office 365 group	12
Creating a subsite	15
Hub sites – the ‘connective tissue’	20
Creating a hub site.....	20
Searching	24
The SharePoint start page	26
Sharing.....	28
SharePoint policies	28
External sharing - our examples	31
Sharing – our Team sites.....	35
Link settings.....	35
Document libraries.....	37
Adding columns.....	37
Enterprise keywords	40
Check in, check out	43
Lists and Microsoft Lists	50

Custom List 51

Microsoft lists 57

Sharing your list 64

Introduction

SharePoint is a powerful intranet and document management platform and is also the backbone of many features in Microsoft 365. From OneDrive to Teams, SharePoint plays a dominant role in this ecosystem.

SharePoint has many features, far too many to be explained in a single eBook! With this in mind, this eBook is for a SharePoint Power User, someone who has a role that sits between a Microsoft 365 administrator and an end-user of SharePoint.

A Super User would be familiar with SharePoint Online (or an on-premise version such as SharePoint 2016 - 2019) and have the permissions to create sites. Ideally, have access to the SharePoint admin center, which is in the Admin portal of Microsoft 365.

SharePoint Super Users are also IT staff who have been tasked with rolling out Microsoft 365 and are new to SharePoint itself. In such cases, this eBook details the various scenarios that SharePoint can be used in your organization.

However, if you don't have access to the SharePoint admin center – don't worry – we supply plenty of guidance that will help you to advise your IT Department on how to implement the suggestions in this eBook.

Also, this book is helpful for:

- People in charge of rolling out SharePoint within an organization and need to decide what SharePoint sites should be used for different scenarios
- People who have to support the rollout of SharePoint and help end-users become familiar with it
- People who have to structure libraries and lists in order to make sure files and data are easily found

How this book is structured

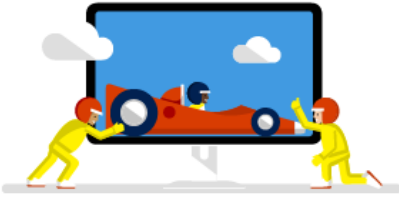
There are four main parts to this eBook.

1. **Setting the scene** looks at the different types of SharePoint sites and how they typically work within an organization. Also, we look at how site collections are related to each other.
2. **Sharing** covers both internal sharing within your organization and external sharing with third parties.
3. **Document libraries** examine the most common approaches to document libraries in terms of columns and metadata.
4. **Lists** covers SharePoint lists and the relatively new Microsoft lists.


Setting the scene

What SharePoint site should you start with?

Create a site
Choose the type of site you'd like to create.



Team site
Share documents, have conversations with your team, keep track of events, manage tasks, and more with a site connected to a Microsoft 365 Group.



Communication site
Publish dynamic, beautiful content to people in your organization to keep them informed and engaged on topics, events, or projects.

There are two main sites that SharePoint offers: a Team site and a Communication site.

- Team sites are for collaborating with colleagues where people tend to work with similar permissions. According to Microsoft, in a Team site, 'all members are content authors where we jointly create and edit content'
- Communication sites are generally used as intranets in large organizations. A few people would edit the site, while most viewers would have read-only permissions

For more on their use cases, see here: <https://docs.microsoft.com/en-us/microsoft-365/community/team-site-or-communication-site>

It's important to take time to consider what site you should use and why. If you don't plan your SharePoint rollout carefully, you may run into problems at a later stage.

Take time to consider the following:

- What departments need a SharePoint site – perhaps some departments might only need a page
- Who has the authority to create SharePoint sites?
- Should you use Teams instead of a SharePoint site for certain situations?
- And once your SharePoint sites are up and running, who will be their ‘champions’ and encourage their usage?

Team site

Let’s start with the oldest and most fundamental SharePoint site – the Team site.

1. Select the above Team site option and enter the following details:

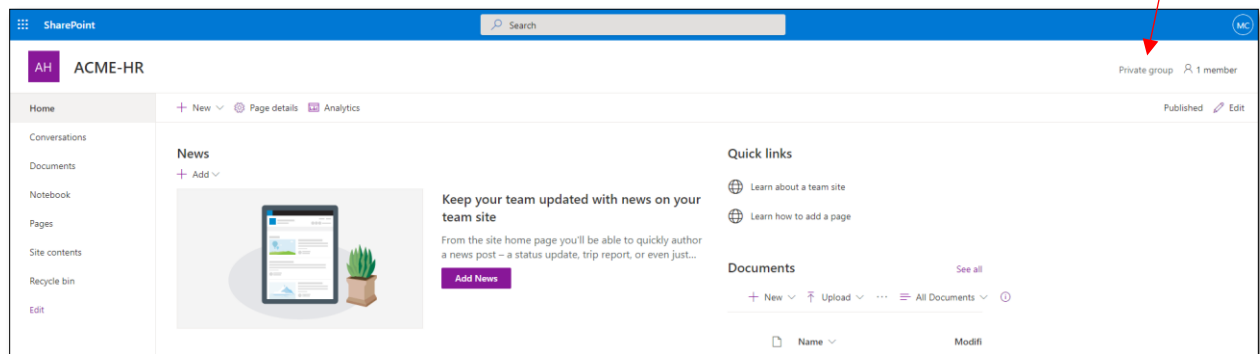
- Site Name
 - In our example, we’re calling it ACME-HR
- Group email address
- Site address
- Site description
- Privacy settings, either:
 - Private – only members can access this site
 - Public – anyone in the organization can access this site

2. Select Private - only members can access this site.

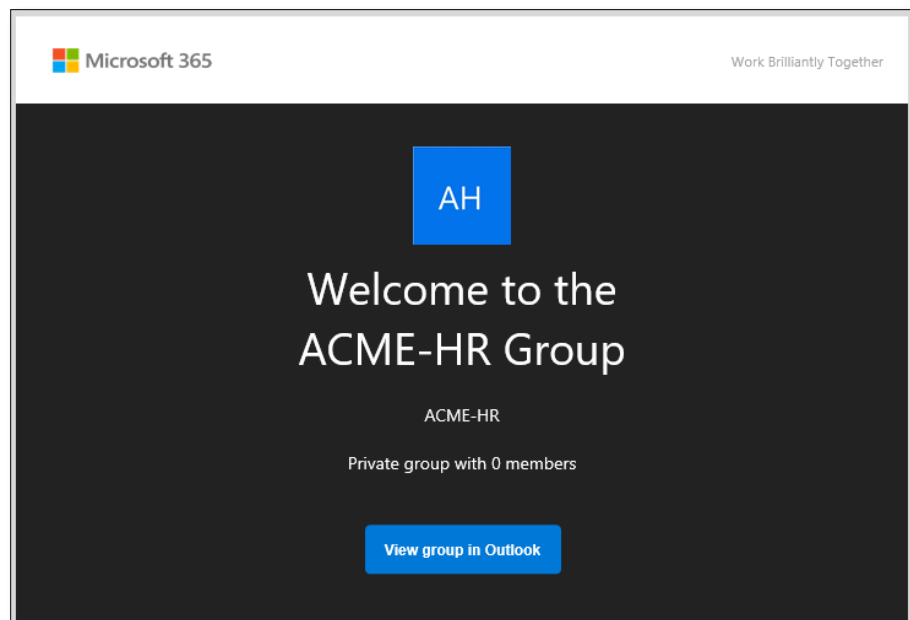
Note: Private and Public still refer to people within your ‘Organization’; while you can have third parties access your SharePoint sites, they are not considered public but ‘External’ people.

3. On the next page, you can add additional owners. You don’t have to add members (this only applies if you have selected the Private option) and select Finish.

Below is the out-of-the-box Team site template. Note: Private group is written here.



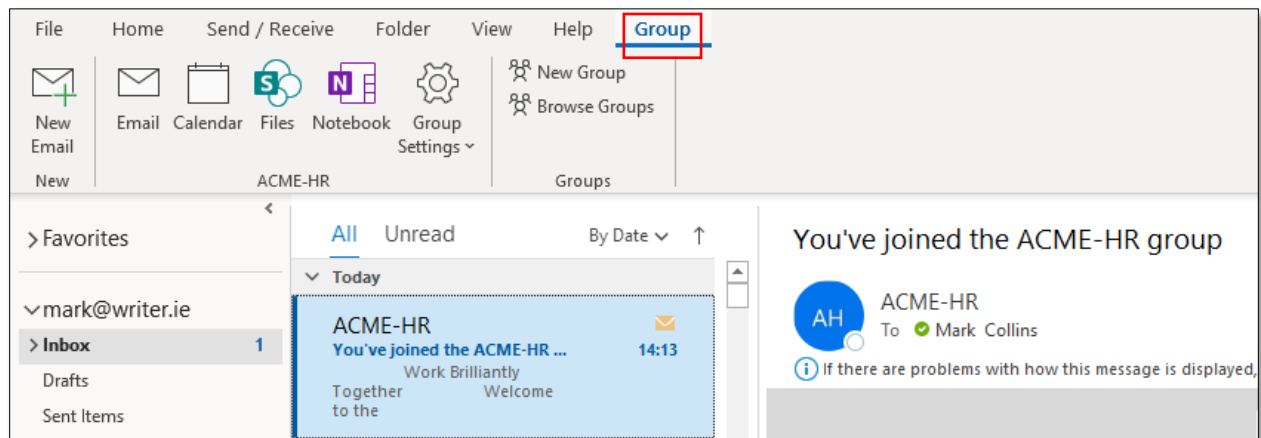
When you create a Team (private group) site, you are also creating an Office 365 group which means you'll get the following email:



What is an Office 365 group?

Typically, an Office 365 group contains the people who have permission to your SharePoint site, along with other items and a group email, too.

In Outlook, if you select the email from your group, you will have a Group option in the ribbon:



While in this view, if you select New Email, you'll be emailing from the group's email and not your own. Also, the Calendar, Files and Notebook relate to your corresponding SharePoint Team site that you just created.

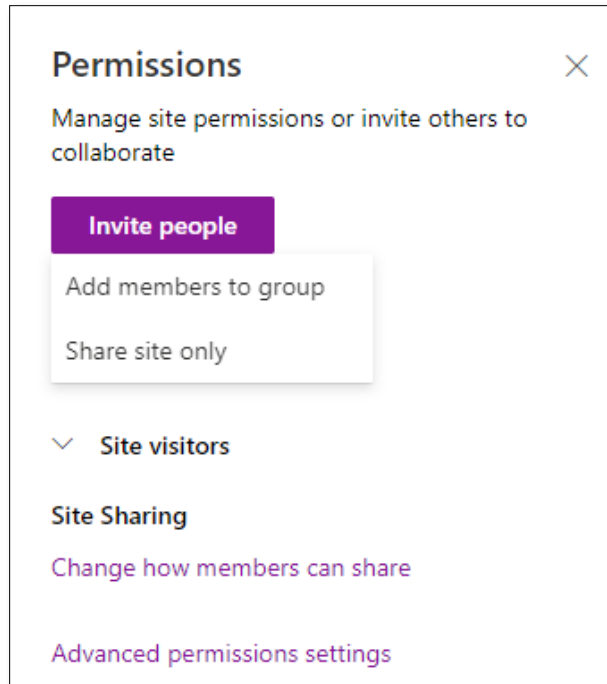
Permissions for your Team site

There are two ways to add people to a Team site:

1. Add them to one of three SharePoint groups: Owners, Members, and Visitors.
2. Add them to the Office 365 group, which was created when the Team site was created.

You come across these options when you go to:

1. Settings → Site Permissions.



2. When you select Invite people, you are given two choices:
 - a. Add members to group
 - b. Share site only

If you select 'Share site only', you get this warning:

Note that this site is part of a Microsoft 365 Group. If you add users here, they will be given access to the site, but not to other group resources such as calendars and conversations. To do that, add members to the group instead.

3. Whereas, if you select 'Add members to group', that person will become an Office 365 group member and will get an email like we did when the ACME-HR site was created in the first place.

If you choose to add people to a SharePoint group, you can add individual users, security groups or a pre-existing Microsoft 365 group to one of three SharePoint groups.

Note: Microsoft defines a security group as an Active Directory group ‘used to assign permission to shared resources.’

A SharePoint group only exists within SharePoint, and it’s a ‘Collection of users who all have the same set of permissions to sites and content. Rather than assign permissions one person at a time, you can use groups to conveniently assign the same permission level to many people at once.’ For more information on SharePoint site permission, see here <https://docs.microsoft.com/en-us/sharepoint/customize-sharepoint-site-permissions>

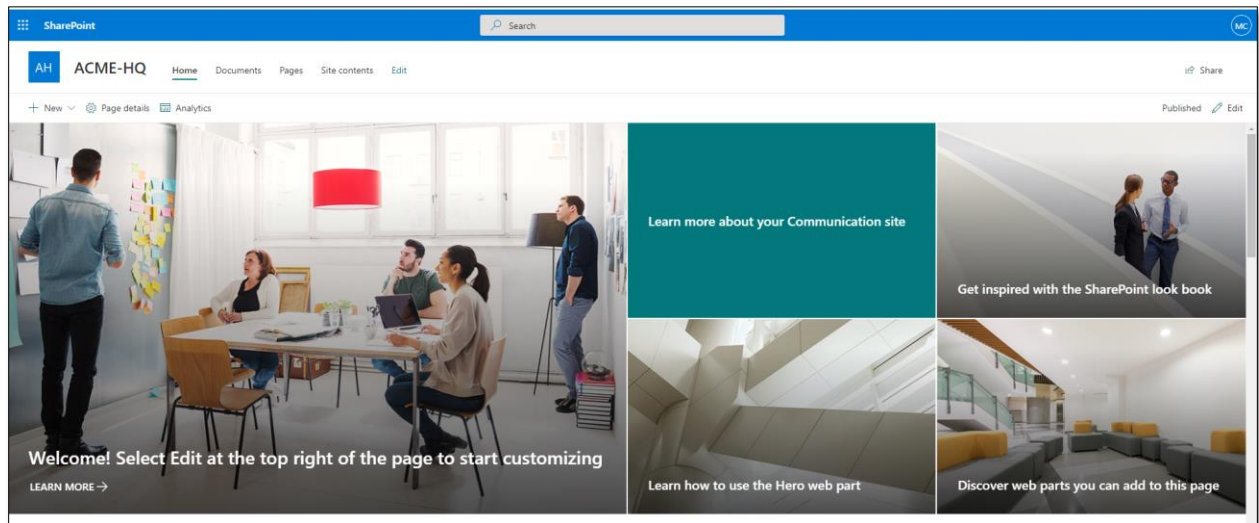
Title	Default permission level	Used for
Owner	Full control	People who must be able to manage site permissions, settings, and appearance.
Member	Edit and contribute	People who must be able to edit site content. Permission level depends on the site template that was used to create the site.
Visitor	Read only	People who must be able to see site content, but not edit it.
Table source: https://support.microsoft.com/en-us/office/overview-site-governance-permission-and-sharing-for-site-owners-95e83c3d-e1b0-4aae-9d08-e94dcaa4942e		

Note: Office 365 groups have the permission levels Owners and Members; these are the same as the SharePoint group permissions.

Communication site

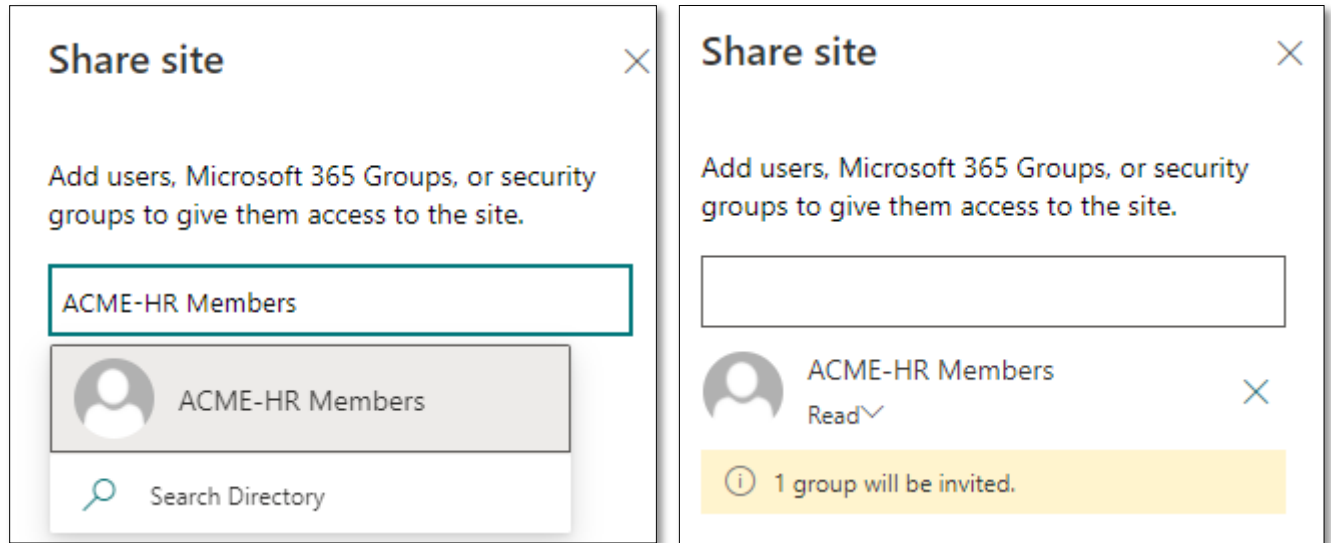
To create a Communication site, there are fewer steps than a Team site. Also, you will not get an email stating that you have joined an Office 365 group.

In our example below, we've created a communication site and called it ACME-HQ.

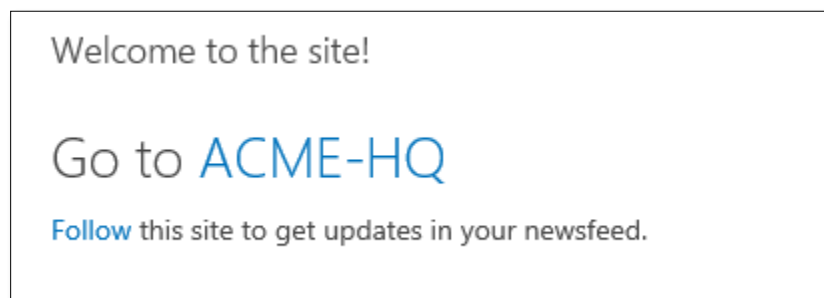


Now that we have our ACME-HQ Communications site, let's add the ACME-HR group to it.

1. Select Share site.
2. Enter and search for ACME-HR Members.



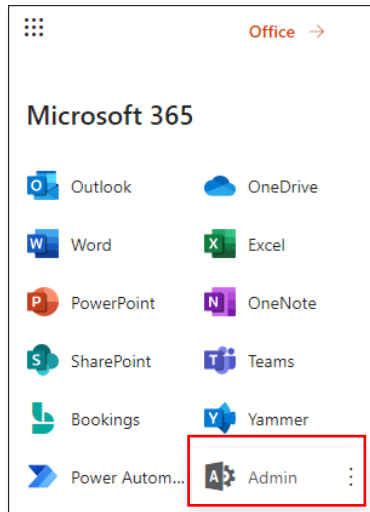
3. All the members of the ACME-HR Office 365 group will now be able to Read the Communication site.
4. When you add people to a SharePoint group, they will get the following email. Note: They are not part of an Office 365 group, just a regular Read-only visitor to the site.



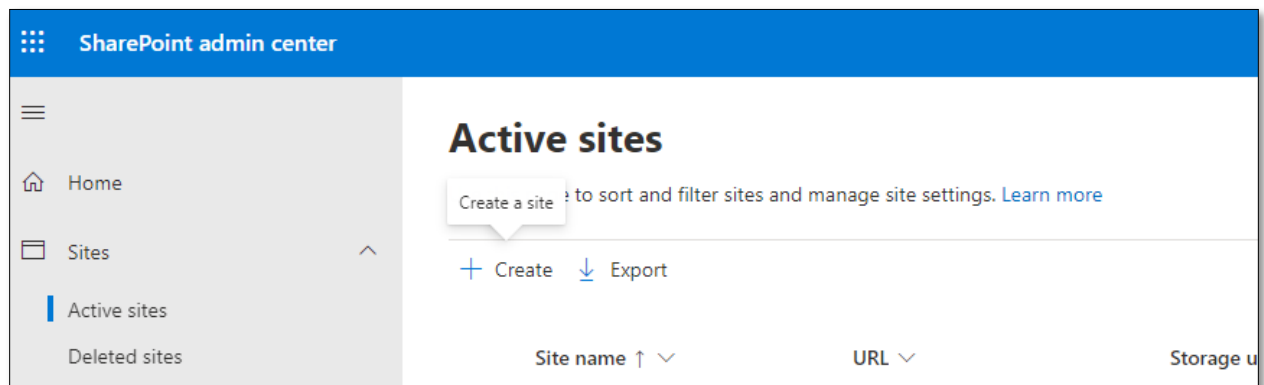
Creating a Team site without an Office 365 group

While Microsoft are pushing site owners to create Team sites with Office 365 groups (the default setting), if you have access to the SharePoint admin center, you can create a Team site without a group.

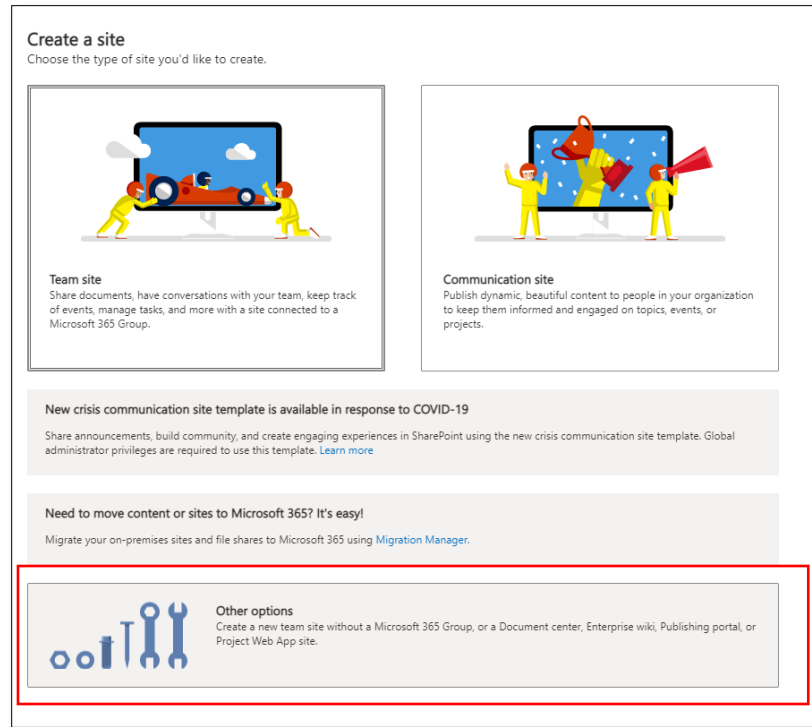
You access the SharePoint admin center via the Microsoft 365 Admin portal. Here, you have a few more options when it comes to creating SharePoint sites.



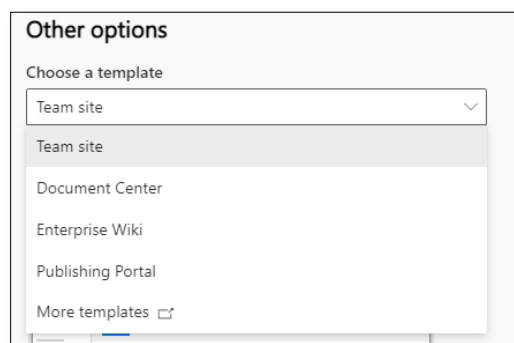
1. In the SharePoint admin center, select Create a site.



2. Select Other options.

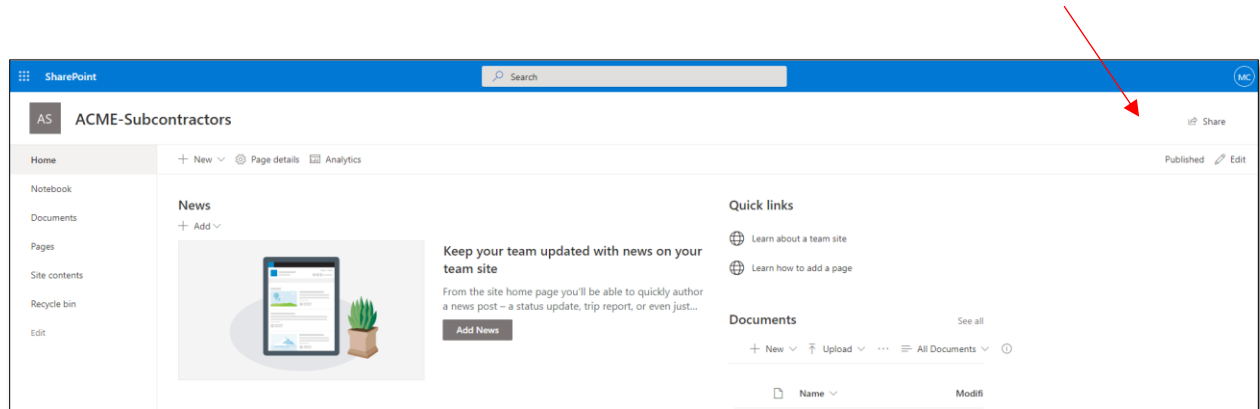


3. Select Team site from the below options. (See here for more information about the various SharePoint sites <https://support.microsoft.com/en-us/office/using-templates-to-create-different-kinds-of-sharepoint-sites-449eccec-ff99-4cf3-b62e-dcfee37e8da4?ui=en-us&rs=en-us&ad=us>.)



4. Enter the name, address and primary administrator, and select Finish. In our example, we've called our site ACME-Subcontractors.

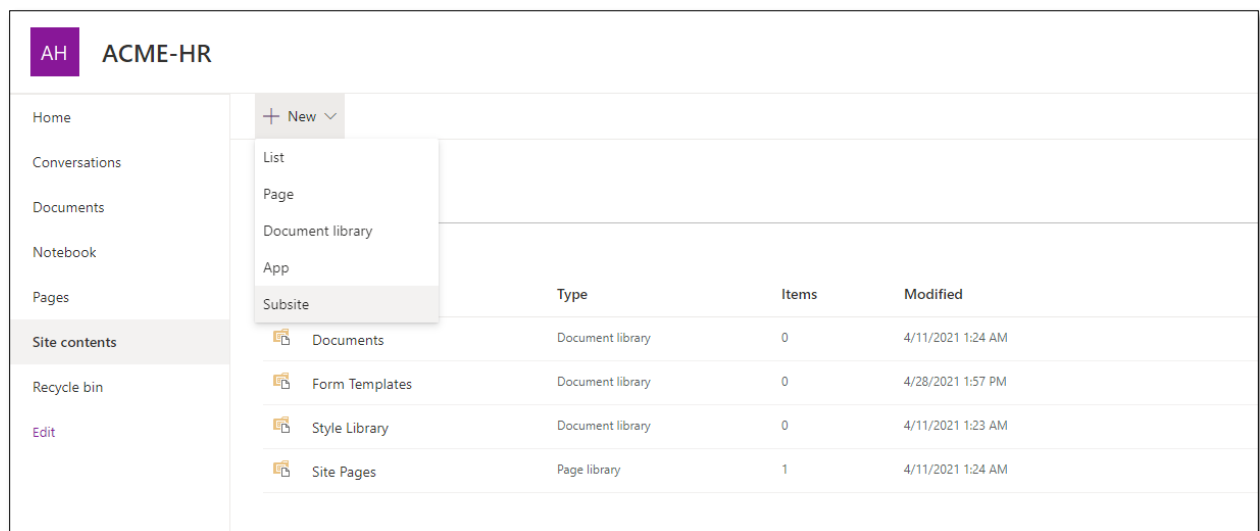
5. You will notice that Private group does not appear on the top right-hand side.



Creating a subsite

Let's create a subsite to our ACME-HR site.

1. On the homepage, select the 'gear' icon → Site content.
2. Select New → Subsite.



3. You'll notice that the default site does not have an Office 365 group. That's because an Office 365 group already exists for this SharePoint site. In our example, we're calling our subsite ACME-Contracts.

The screenshot shows the 'New SharePoint Site' page in the SharePoint interface. On the left is a navigation pane with links: Home, Conversations, Documents, Notebook, Pages, Site contents, Recycle Bin, and an 'EDIT LINKS' button. The main content area is titled 'Site contents ▸ New SharePoint Site' and includes an 'EDIT LINKS' button. It is divided into three sections: 'Title and Description', 'Web Site Address', and 'Template Selection'. In the 'Title and Description' section, the 'Title' field contains 'ACME-Contracts' and the 'Description' field is empty. In the 'Web Site Address' section, the 'URL name' field shows the path 'https://bootsy.sharepoint.com/sites/ACME-HR/' followed by a sub-site name field containing 'ACME-Contracts'. In the 'Template Selection' section, 'Select a language' is set to 'English'. Under 'Select a template', there are three tabs: 'Collaboration', 'Enterprise', and 'Duet Enterprise'. The 'Collaboration' tab is active, showing a list of templates: 'Team site (no Microsoft 365 group)' (which is highlighted), 'Team site (classic experience)', and 'Project Site'. A note at the bottom states: 'A site with no connection to a Microsoft 365 Group.'

4. Further down the page, select Use unique permissions while keeping the other defaults as they are.

Permissions

You can give permission to access your new site to the same users who have access to this parent site, or you can give permission to a unique set of users.


Note: If you select **Use same permissions as parent site**, one set of user permissions is shared by both sites. Consequently, you cannot change user permissions on your new site unless you are an administrator of this parent site.

User Permissions:


☐ Use same permissions as parent site

☒ Use unique permissions

Navigation


 Display this site on the Quick Launch of the parent site?

☐ Yes ☒ No

 Display this site on the top link bar of the parent site?

☒ Yes ☐ No


Navigation Inheritance

 Use the top link bar from the parent site?

☐ Yes ☒ No

By using unique permissions, the subsite will not inherit the permissions which its 'parent' site has, i.e. people who have access to ACME-HR do not have access to ACME-Contracts.

In the below screenshot, you will see that only one person has access. We don't have to add anybody at this stage.



[EDIT LINKS](#)

People and Groups › Set Up Groups for this Site

Home
Notebook
Documents
Pages
Site contents
Recycle Bin

[EDIT LINKS](#)

Visitors to this Site

Visitors can **read** content in the Web site. Create a group of visitors or re-use an existing SharePoint group.

☒ Create a new group
☐ Use an existing group

Members of this Site

Members can **contribute** content to the Web site. Create a group of site members or re-use an existing SharePoint group.

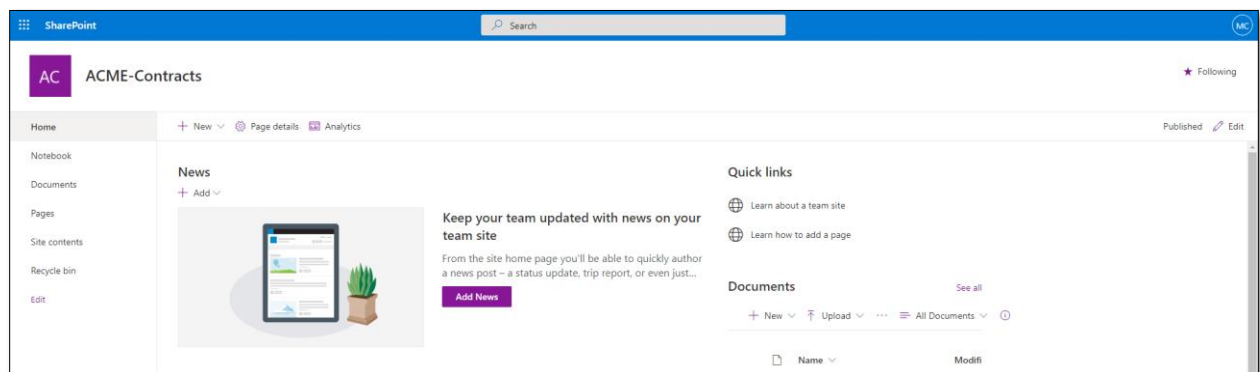
☒ Create a new group
☐ Use an existing group

Owners of this Site

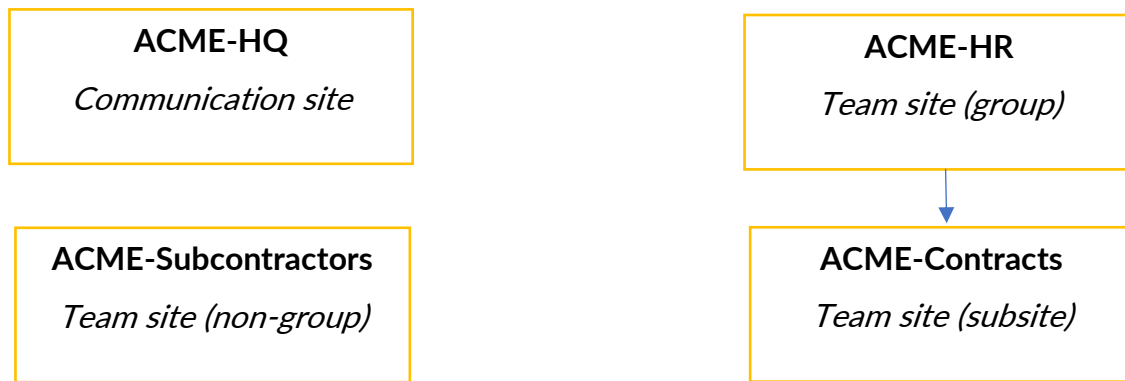
Owners have **full control** over the Web site. Create a group of owners or re-use an existing SharePoint group.

☒ Create a new group
☐ Use an existing group

And here is the finished site:



So far, we have created four SharePoint sites:



Technically, we have created three 'site collections', and one of the site collections (ACME-HR) has a subsite. What this means is that if you have permission to see one of the site collections, you don't have permission to see any of the other site collections.

And even though we have added a subsite to ACME-HR, as we put unique permissions on it, if you can see the top-level site, it does not necessarily mean you can see the ACME-Contracts subsite.

Some points about Site collections:

- They have unique site columns and metadata, navigation, permissions, and potentially, site templates and branding
- If you create more than one site collection, you will have to recreate the branding and ensure that your permissions are correct
- Site collections are ideal if you want departments within your organization to have a standalone collection of sites that are completely independent of each other
- Site collections are great for external sharing as you can turn on external sharing just for that site collection, thereby ensuring that people don't accidentally share from an internal site

What sites and subsites are used for:

- In small organizations, sites and subsites are a quick and easy way to roll out your intranet with minimal fuss in terms of permissions. This is especially true if most people need to have access to most of the content, i.e. you are moving from Dropbox or an on-premise server and you are 'dumping' a lot of files into one SharePoint site
- As a subsite will inherit aspects of its 'parent' such as branding, it's easy to keep the look and feel as you add more subsites

One of the main advantages of site collections over subsites is if you have many subsites and your organizational structure changes, it's hard to amputate one subsite and transplant it to another subsite. However, if you have many site collections and none of the site collections have subsites, if a department changes its name or ceases to exist, you can just remove/rename that site collection without affecting your overall structure.

In short, large site collections with multiple subsites are not nimble.

Hub sites – the 'connective tissue'

While having independent site collections has its advantages, there is a way to have a connection between them – they are called hub sites.

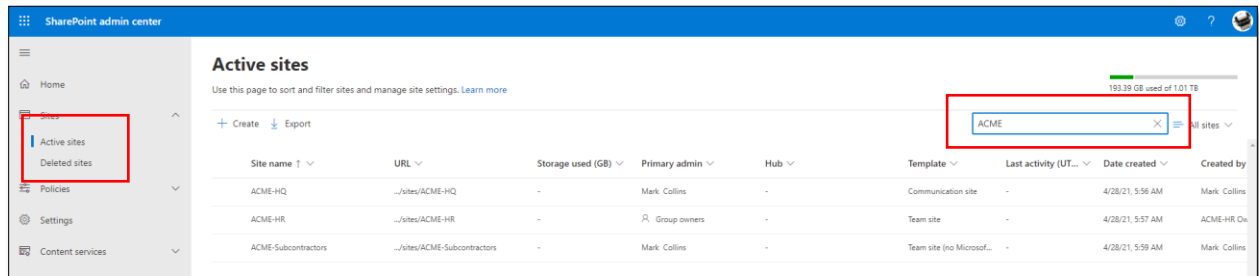
According to Microsoft, a hub site is used 'When you want to create a shared experience for a family of related sites—to discover related content by rolling up site activity and news, organize related sites so that they share a common navigation, and apply a common look and feel.' (For more details, see here <https://docs.microsoft.com/en-us/sharepoint/planning-hub-sites>.)

Creating a hub site

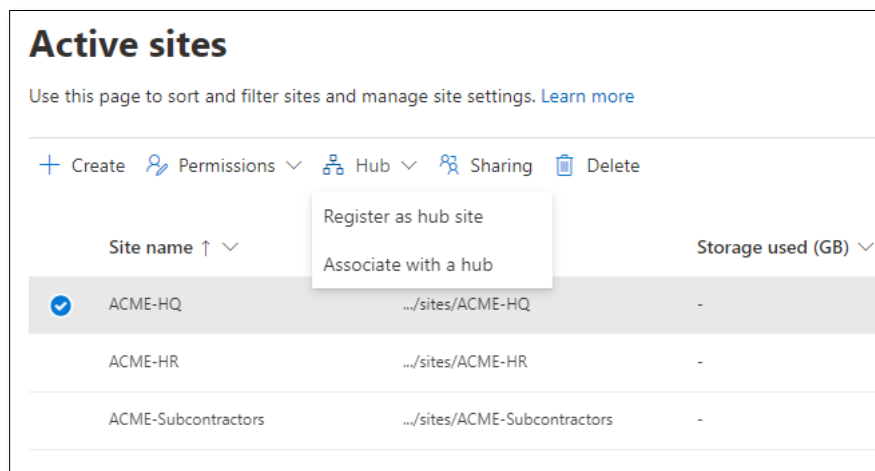
To turn our ACME-HQ communications site into a hub site, you must have access to the SharePoint admin center.

1. In the SharePoint admin center, let's search for the three sites that we've created.
2. Select Active sites.

3. Enter name in the Search box.



4. Select the site which you want to register as a hub i.e. in our case, it's the ACME-HQ site.
5. Under Hub → Register as a hub.



6. Enter the name of the person (i.e. the main administrator for the hub site) that can associate other SharePoint sites with this hub.
7. It is now a hub site. However, just because it's a hub site, we still have to associate other sites with it.

Active sites

Use this page to sort and filter sites and manage site settings. [Learn more](#)

+ Create Permissions Hub Sharing Delete ACME

Site name ↑ ↓	URL ↓	Storage used (GB) ↓	Primary admin ↓	Hub ↓	Template ↓
ACME-HQ	.../sites/ACME-HQ	0.00	Mark Collins	ACME-HQ (Hub site)	Communication site
ACME-HR	.../sites/ACME-HR	0.00	Group owners	-	Team site
ACME-Subcontractors	.../sites/ACME-Subcontractors	0.00	Mark Collins	-	Team site (no Microsof...

8. Let's associate ACME-HR with the above hub site. Select ACME-HR and choose Associate with a hub.

Active sites

Use this page to sort and filter sites and manage site settings. [Learn more](#)

+ Create Permissions Hub Sharing Delete

Site name ↑ ↓	Storage used (GB) ↓
ACME-HQ	.../sites/ACME-HQ 0.00
ACME-HR	.../sites/ACME-HR 0.00
ACME-Subcontractors	.../sites/ACME-Subcontractors 0.00

Register as hub site
 Associate with a hub

9. Select ACME-HQ.

Edit hub association

When you associate this site with a hub, it inherits the hub site's theme and navigation. Content from the site will roll up to the hub site and be included in searches on the hub site. [Learn more about planning hub sites](#)

Select a hub


ACME-HQ

10. Now, two of our three ACME sites are related to each other as ACME-HQ is a hub site, and ACME-HR is associated with it.

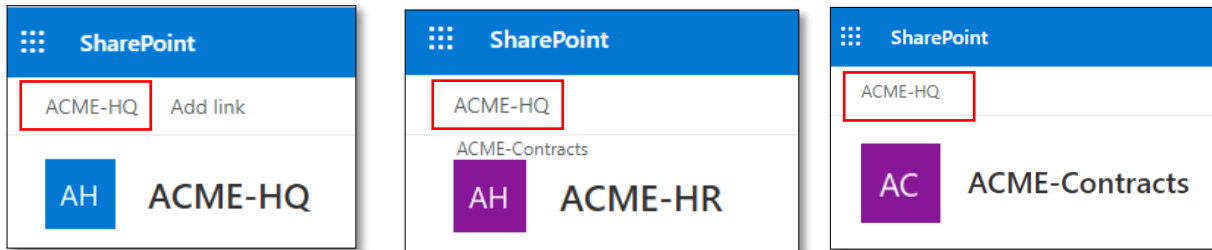
Active sites

Use this page to sort and filter sites and manage site settings. [Learn more](#)

[+](#) Create [↓](#) Export

Site name ↑ ↓	URL ↓	Storage used (GB) ↓	Primary admin ↓	Hub ↓
ACME-HQ	.../sites/ACME-HQ	0.00	Mark Collins	ACME-HQ (Hub site)
ACME-HR	.../sites/ACME-HR	0.00	 Group owners	ACME-HQ
<input type="radio"/> ACME-Subcontractors	.../sites/ACME-Subcontractors	0.00	Mark Collins	-

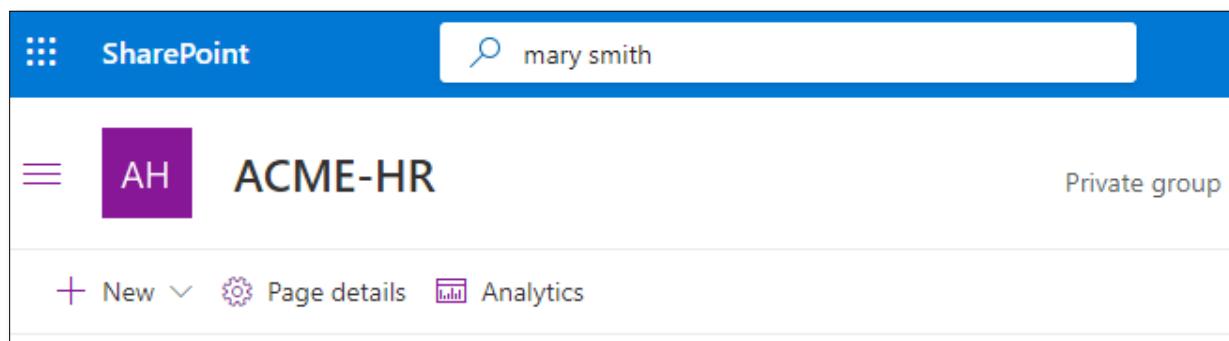
11. On each SharePoint site (and subsite whose parent is associated), this is evident in the navigation. However, by default, the hub site does not list in its navigation menu what sites are associated with it; hence, the reason you see Add link.



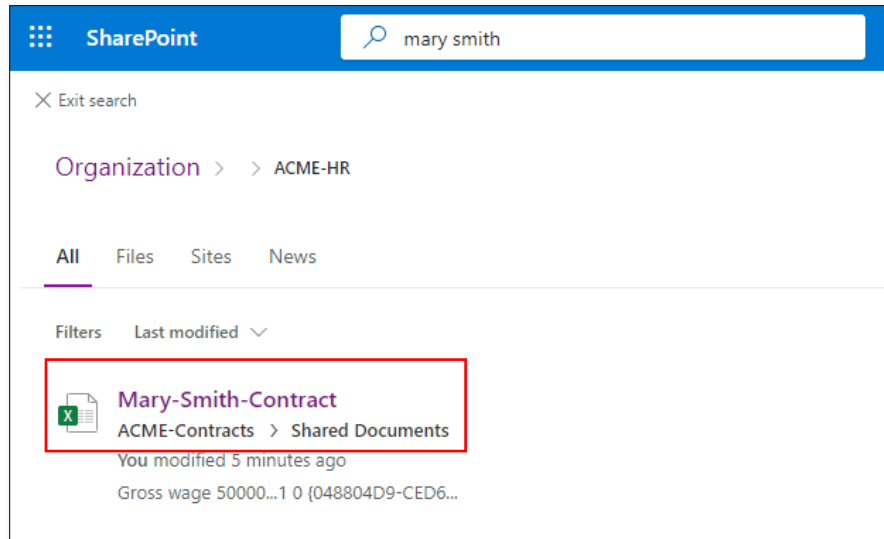
Searching

Traditionally, when you wanted to find a file in SharePoint, you went to the SharePoint site, and you searched for it. Typically, the search results would bring up items from the site and its subsites – but nothing more.

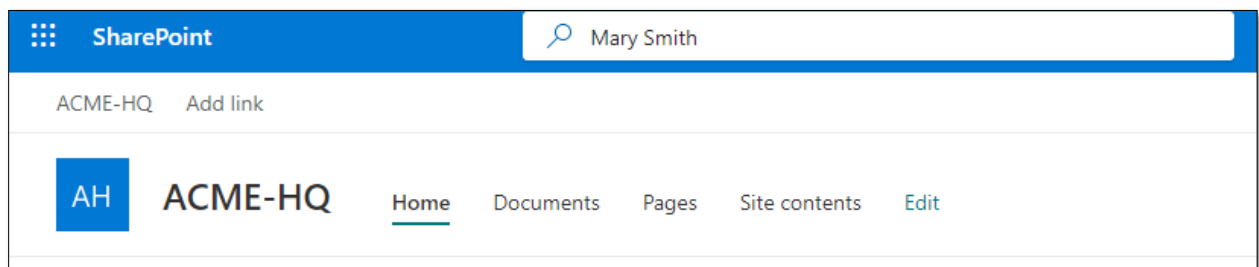
This approach still exists. Let's take our ACME-HR site. There's a contract for Mary Smith on the ACME-HR subsite (ACME-Contracts), and we want to find it by searching for her name on the parent site.



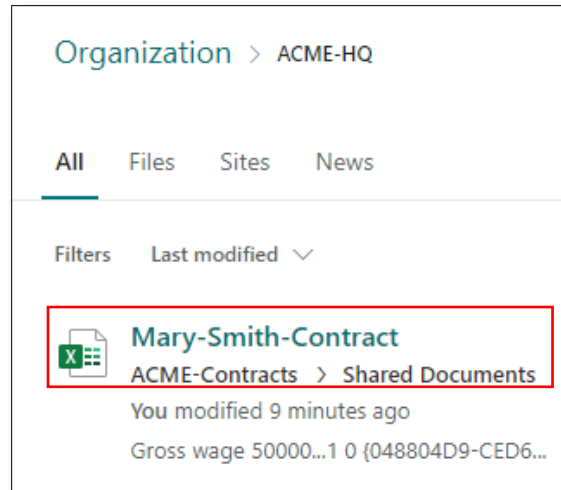
Here are the results: it brings up the Excel file name and where it is i.e. the ACME-Contracts subsite → Shared Documents. Share documents is the default document library that comes with every SharePoint site.



If I do the same search from the ACME-HQ hub site, it brings it up, too:



When the search is returned, it details that the Organization is ACME-HQ (i.e. the hub site relationship), and then it lists ACME-Contracts → Shared Documents.

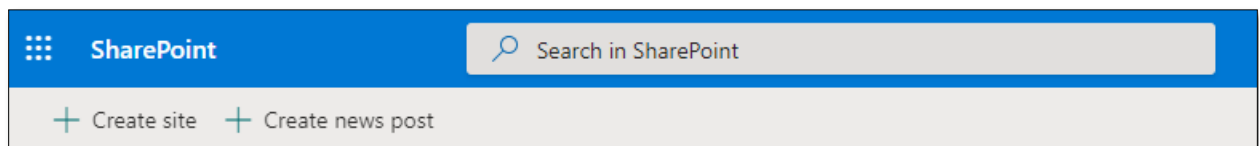
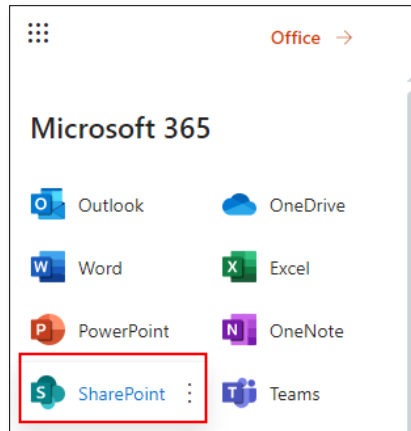


Note: As the ACME-HR site is associated with the ACME-HQ hub site, when you search in ACME-HQ you will get results from the ACME-HR site. This is one of the benefits of hub sites and their associated sites.

The SharePoint start page

The above way of searching for content is a mixture of the traditional and 'modern' way; however, Microsoft have introduced a third way of searching via the SharePoint start page.

Not sure what that is? Well, it's the SharePoint link you see in your 365 online portal when you select the nine dots or the 'app launcher'.



When you search here, please note:

- Your search results are **entirely unique**. On the SharePoint start page, your search is tailored around your permissions
- You are searching all the SharePoint sites, hub sites, subsites that you have access to
- Your OneDrive is searched too
- You can filter items by file type and data range

Sharing

It goes without saying – SharePoint is all about sharing. Not only can you share many different items, but you can also do so in many different ways. Also, various SharePoint sites within an organization tend to have a different approach to sharing which depends on their audience.

Ultimately, there are two ways of sharing in SharePoint.

You can (if you have the permission level) share an entire SharePoint site by selecting Share on the top right-hand side of the site. In addition to sharing the entire site, you can share individual items on a site via a link.

- When you share a site, you share everything on the site while adding that person to a SharePoint group
- When you share a link, you are just sharing the contents of that link which could be a file or a folder that contains files
- Also, you can share a blank folder that does not contain any files at the moment, but when it does, the person who has the link to the folder can access the files

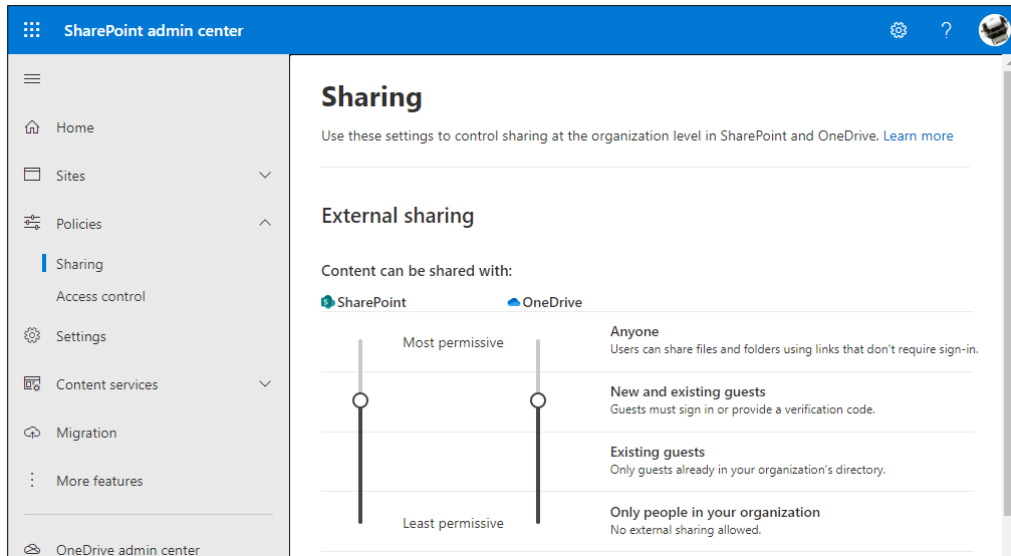
SharePoint policies

To change how SharePoint shares content externally, you must establish it on:

- An organizational level
- An individual site level

Organizational level

To switch it on an organizational level: In the SharePoint admin center select Policies → Sharing.



Please be aware of the following:

- You must sign into the SharePoint admin centre with an account that has admin permissions for your organization
- The default level for both SharePoint and OneDrive is Anyone, which is the more permissive setting
- SharePoint and OneDrive are intimately related across your entire organization. You cannot have a OneDrive setting that is more permissive than a SharePoint setting
- The SharePoint settings also apply to all SharePoint site types, including those associated with a 365 group

Select this option:	If you want to:
Anyone	Allow users to share files and folders by using links that let anyone who has the link access the files or folders without authenticating. This setting also allows users to share sites with new and existing guests who authenticate. If you select

Select this option:	If you want to:
	<p>this setting, you can restrict the Anyone links so that they must expire within a specific number of days, or so that they can give only View permission.</p> <p>File requests requires that OneDrive be set to Anyone and edit permissions for Anyone links be enabled. OneDrive settings other than Anyone disable file requests.</p> <p>See Best practices for sharing files and folders with unauthenticated users for more information.</p>
New and existing guests	<p>Require people who have received invitations to sign in with their work or school account (if their organization uses Microsoft 365) or a Microsoft account, or to provide a code to verify their identity. Users can share with guests already in your organization's directory, and they can send invitations to people who will be added to the directory if they sign in. For more info about verification codes, see Secure external sharing in SharePoint</p> <p>Invitations to view content can be redeemed only once. After an invitation has been accepted, it can't be shared or used by others to gain access.</p>

Select this option:	If you want to:
Existing guests	Allow sharing only with guests who are already in your directory. These guests may exist in your directory because they previously accepted sharing invitations or because they were manually added, such as through Azure B2B collaboration . (To see the guests in your organization, go to the Guests page in the Microsoft 365 admin center).
Only people in your organization	Turn off external sharing.
Table source: https://docs.microsoft.com/en-us/sharepoint/turn-external-sharing-on-or-off#change-the-organization-level-external-sharing-setting	

External sharing - our examples

With the above in mind, let's look at our four different SharePoint sites and see what type of permissions we want to have in place.

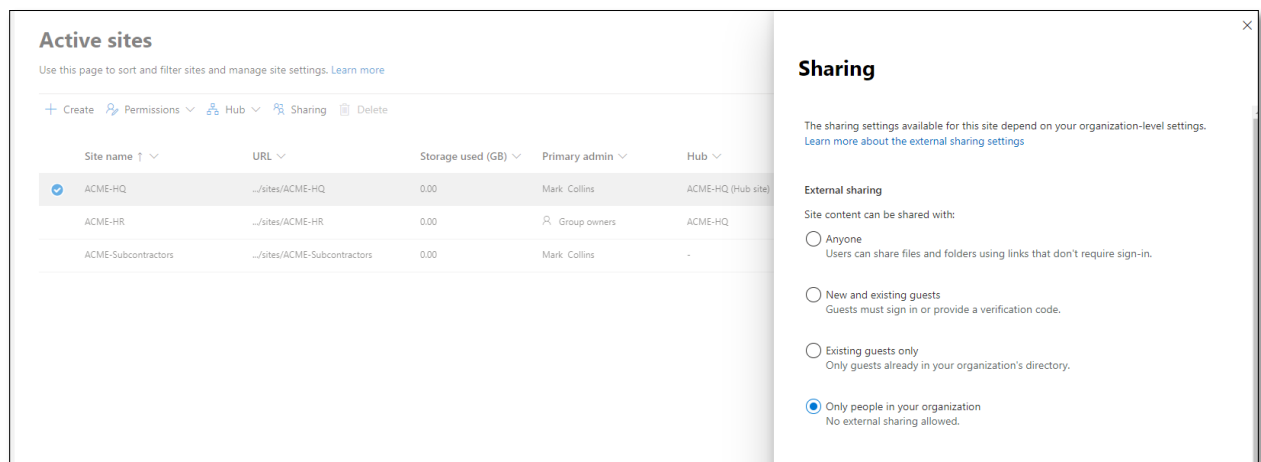
SharePoint site	Our use case
ACME-HQ	This is for everybody in our organization which they can use to find out general company information. We don't want people who have access to this site to share its content with external users. However, we are happy for end users to be

SharePoint site	Our use case
	<p>able to send links to their colleagues in order to bring attention to them.</p> <p>There is no external sharing of links to files/folders.</p> <p>There is no external sharing of the SharePoint site.</p>
ACME-HR	<p>This is just for members of the ACME-HR Office 365 group. For example, let's imagine that ACME Legal Department has a SharePoint site; in this case, we would create an ACME-Legal Office 365 group and SharePoint site and while they could see their site, they would not have access to ACME-HR. Each department will be siloed.</p> <p>There is external sharing of files/folders.</p> <p>There is external sharing of the SharePoint site.</p>
ACME-HR-Contracts	<p>This is for a subset of the ACME-HR Office 365 group, as it contains information about staff contracts which is private.</p> <p>There is external sharing of files/folders.</p> <p>There is external sharing of the SharePoint site.</p>
ACME-Subcontractors	<p>This is a SharePoint site which is just for third parties or subcontractors. In this site, such users will have access to the entire SharePoint site, or just content on the site such as files and folders.</p> <p>There is external sharing of files/folders.</p> <p>There is external sharing of the SharePoint site.</p>

Site level

As mentioned, in order to turn on external sharing, you must do it at the site level, too. Let's check out our settings, starting with ACME-HQ.

1. Select ACME-HQ → Sharing and by default Only people in your organization is selected. This means that external sharing is not allowed. We are happy with this setting.



The other options are detailed below:

Select this option:	If you want to:
Anyone	Allow site owners and others with full control permission to share the site with people who authenticate. Allow site users to decide when sharing files and folders to require authentication or allow unauthenticated people to access the item. Anyone links to files and folders can be freely forwarded.

Select this option:	If you want to:
New and existing guests	Allow site owners and others with full control permission to share the site with people outside the organization. These people will need to sign in and will be added to the directory. Allow site users to share files and folders with people who aren't in the organization's directory.
Existing guests	Allow sharing with only people already in your directory. These users may exist in your directory because they previously accepted sharing invitations or because they were manually added . (You can tell an external user because they have #EXT# in their user name.)
Only people in your organization	Prevent all site users from sharing any site content externally. (This is the default setting for new classic sites.)
Table source: https://docs.microsoft.com/en-US/sharepoint/change-external-sharing-site	

Also, in the SharePoint admin center, you can control the default sharing link and the default link permission, which is View or Edit.

The default sharing links for files and folders are:

- People with existing access
- Specific people
- Only people in your organization link
- Anyone with the link

Sharing – our Team sites

For our ACME-HR and ACME-Subcontractors sites, we want people to be able to externally share, and so we're selecting the New and existing guests option.

The screenshot shows the 'Active sites' page in SharePoint. On the left, a table lists three sites: ACME-HQ, ACME-HR, and ACME-Subcontractors. The ACME-HR site is selected. On the right, the 'Sharing' settings for the selected site are displayed. The 'External sharing' section shows four options: 'Anyone', 'New and existing guests' (selected), 'Existing guests only', and 'Only people in your organization'.

Site name	URL	Storage used (GB)	Primary admin	Hub
ACME-HQ	.../sites/ACME-HQ	0.00	Mark Collins	ACME-HQ (Hub site)
ACME-HR	.../sites/ACME-HR	0.00	Group owners	ACME-HQ
ACME-Subcontractors	.../sites/ACME-Subcontractors	0.00	Mark Collins	-

Sharing

The sharing settings available for this site depend on your organization-level settings. [Learn more about the external sharing settings](#)

External sharing

Site content can be shared with:

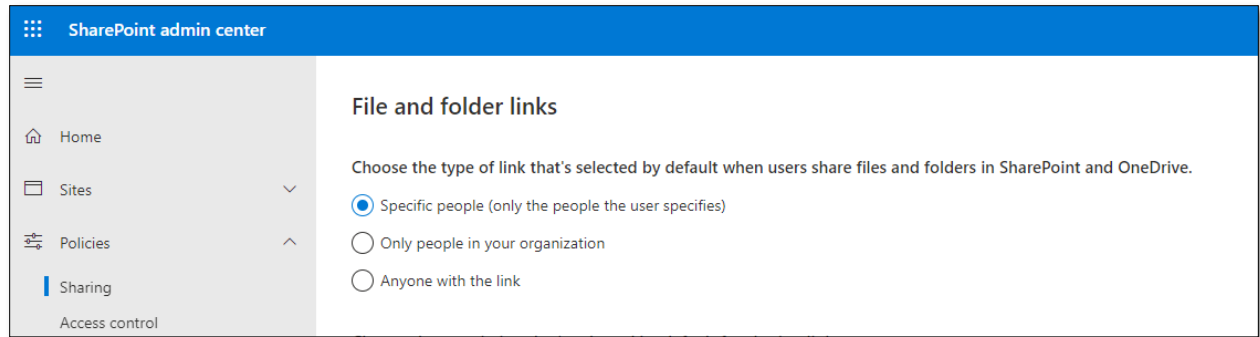
- ☐ Anyone
Users can share files and folders using links that don't require sign-in.
- ☒ New and existing guests
Guests must sign in or provide a verification code.
- ☐ Existing guests only
Only guests already in your organization's directory.
- ☐ Only people in your organization
No external sharing allowed.

With this option, guests must sign in or provide a verification code which will be sent to their email.

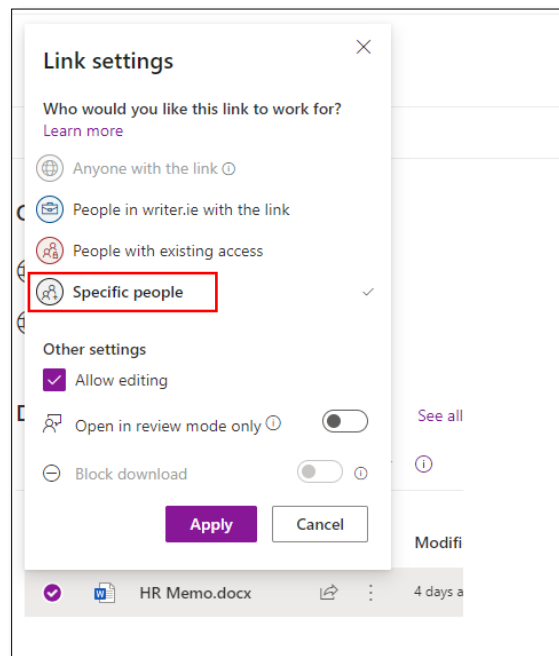
Link settings

When it comes to the default link setting, it's best to be conservative and set Specific people as the first option. This means that if somebody accidentally shares a file, it's only shared to one person; furthermore, if that person forwards the link, while another recipient will get the email, they won't have access to the file.

1. Go to the SharePoint admin center and select Policies → Sharing.
2. Select Specific people (only the people the user specifies).



With this option in place, when you select a file to share, by default, it will state specific people:



Also, because we have allowed external sharing on the ACME-HR site, the ACME-Contracts site also has external sharing switched on too.

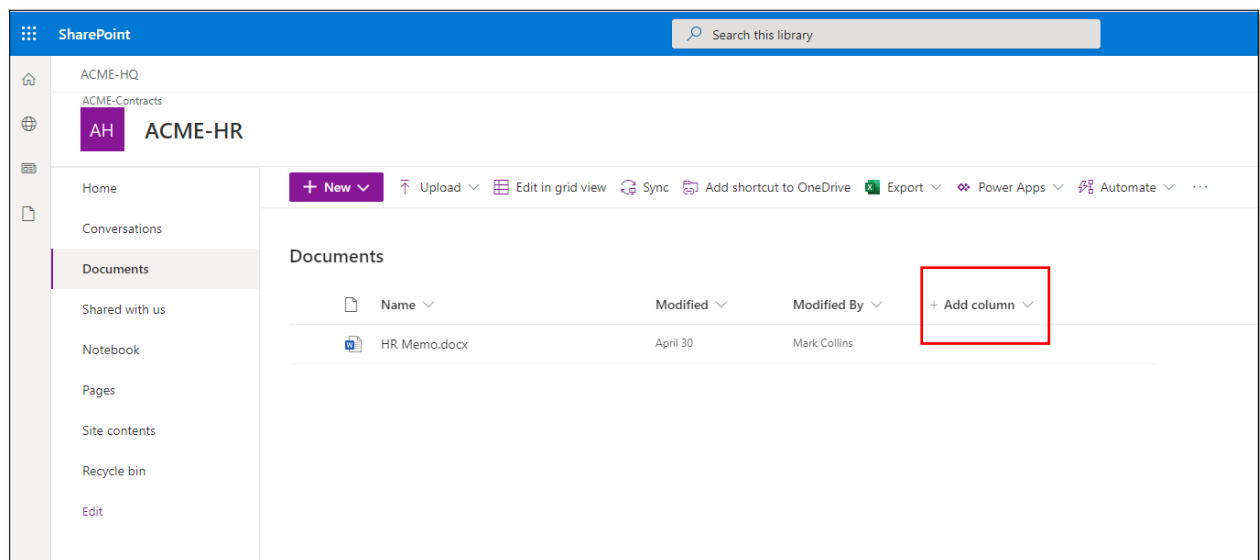
The only difference between ACME-HR and the ACME-Subcontractors' site is that we want subcontractors to only be allowed to download items.

Document libraries

Without a doubt, document libraries are one of the most important features of SharePoint. Even those with very limited exposure to SharePoint have, at the very least, come across a document library.

Over the years, while the function of document libraries hasn't changed – they are primarily used for uploading and downloading content – certain aspects of libraries have been encouraged by Microsoft: these days, it's all about adding columns.

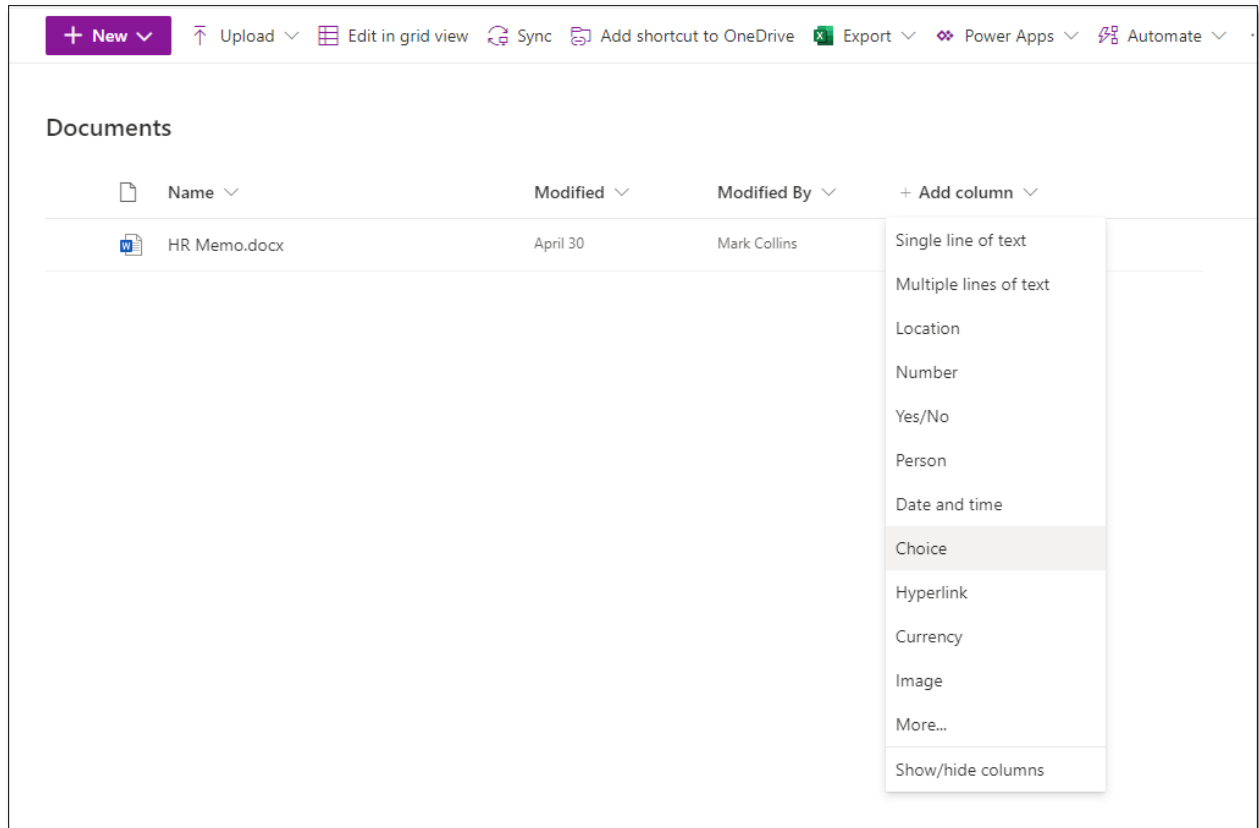
Adding columns



The above is the default out-of-the-box document library; notice the +Add column option. With this column, Microsoft are pushing users to add more columns, and therefore, more ways to filter and find items within a library.

So let's add some columns to help our end users file, find and control the content which is added to the library.

1. Select +Add column → Choice.



2. Name the column and add three choices. We've named the column ACME Dept and our three options are Legal, Marketing, and Sales.

Create a column

[Learn more about column creation.](#)

Name *

Description

Type

Choice

Choices *

Legal

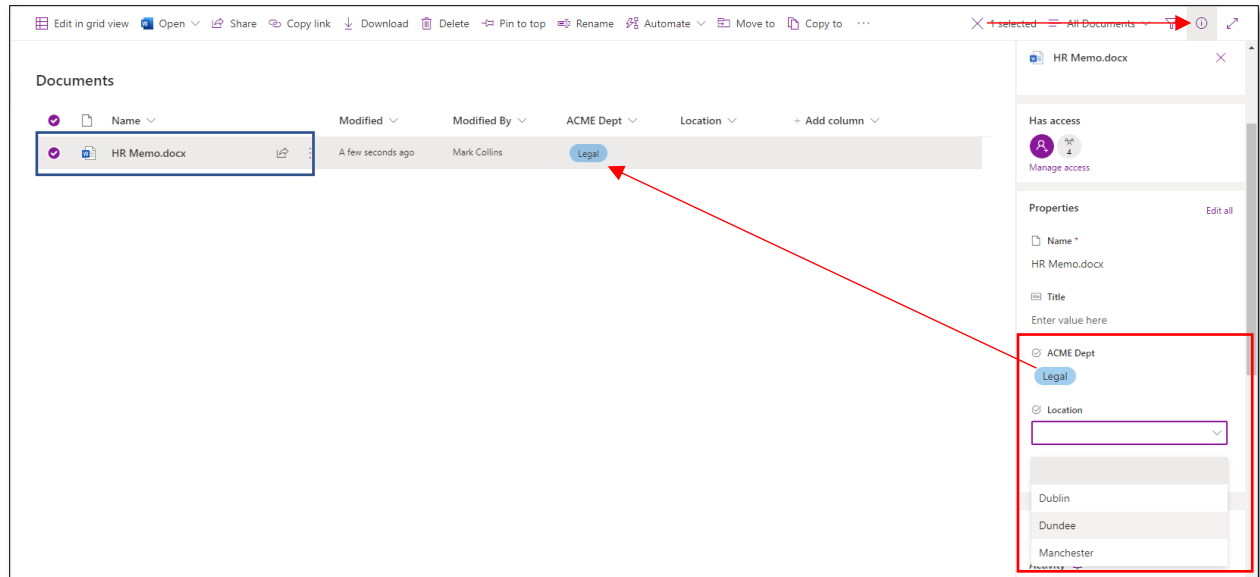
Marketing

Sales

3. Repeat the above steps and add a column called Location with three options: Dublin, Dundee, Manchester.

Over time, this document library will amass hundreds of documents. As each document is added to the library, we can add metadata to each file based on the above selection.

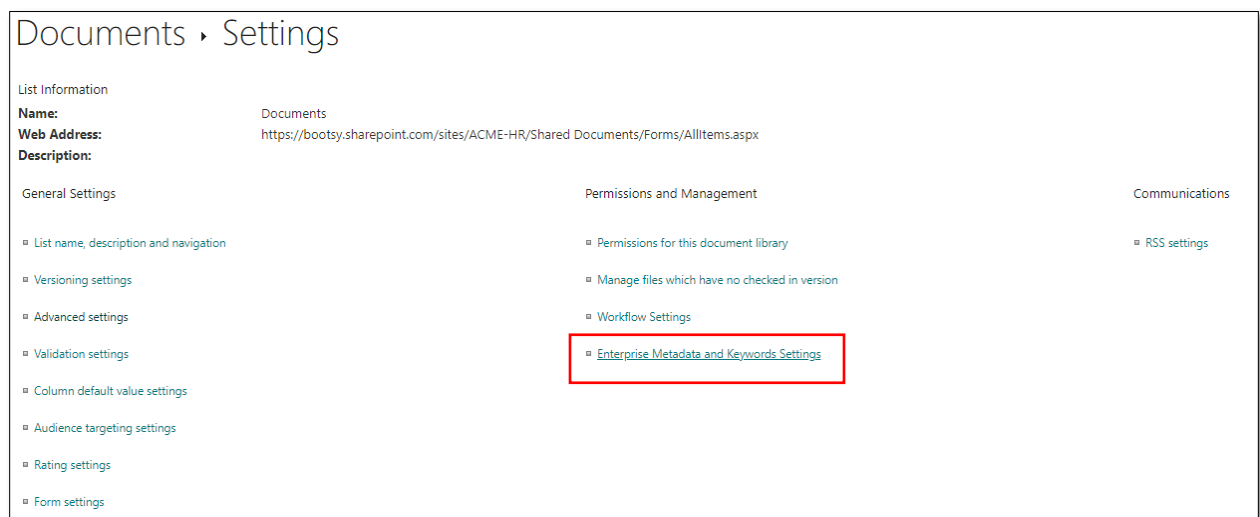
To add the metadata, select the file and choose the Details pane. Scroll down, and you will see the options pertaining to our new columns.



Enterprise keywords

The next column we're going to add is for Enterprise keywords. As defined by Microsoft, this is for 'metadata tagging and to develop a system of classifying and organizing online content into different categories.'

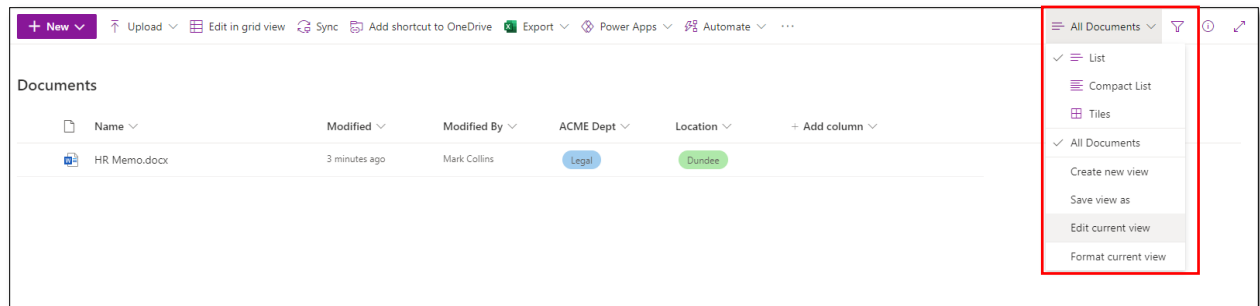
1. While in the library, select Settings → Library settings.
2. Select Enterprise Metadata and Keywords Settings.



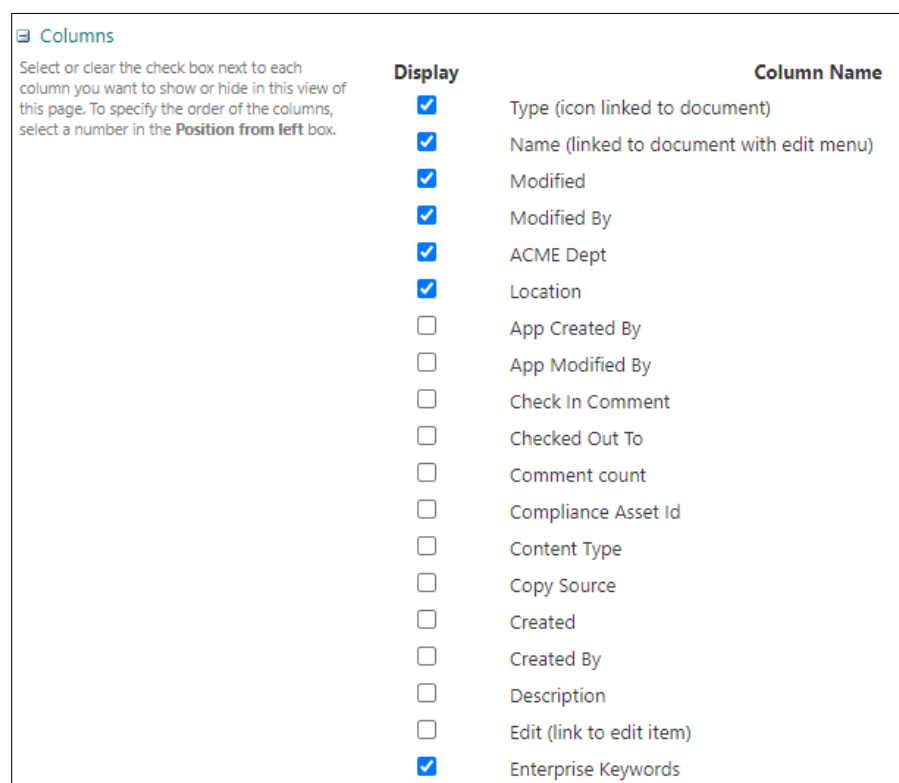
3. Tick the box 'Add an Enterprise Keywords column to this list and enable Keyword synchronization'.

This sounds like a mouthful, but it's really very straight forward! Once we have enabled it, we just then bring in the column where this metadata will be visible.

4. On our document library, select All Documents and Edit current view.



5. Scroll down to find Enterprise keywords and then select OK.



6. Now we have our Enterprise keyword column in place.

Documents						
	Name ▾	Modified ▾	Modified By ▾	ACME Dept ▾	Location ▾	Enterprise Key... ▾ + Add column ▾
	HR Memo.docx	7 minutes ago	Mark Collins	Legal	Dundee	

7. Select the file that we want to associate a keyword with and go to the details pane (same process as above). Once there, we're going to create a new keyword called CEO by typing in 'CEO;'. You must add a semi-colon after the word in order to create the keyword.

Documents						
	Name ▾	Modified ▾	Modified By ▾	ACME Dept ▾	Location ▾	Enterprise Key... ▾ + Add column ▾
	HR Memo.docx	7 minutes ago	Mark Collins	Legal	Dundee	

HR Memo.docx

Enter value here

ACME Dept

Legal

Location

Dundee

Enterprise Keywords

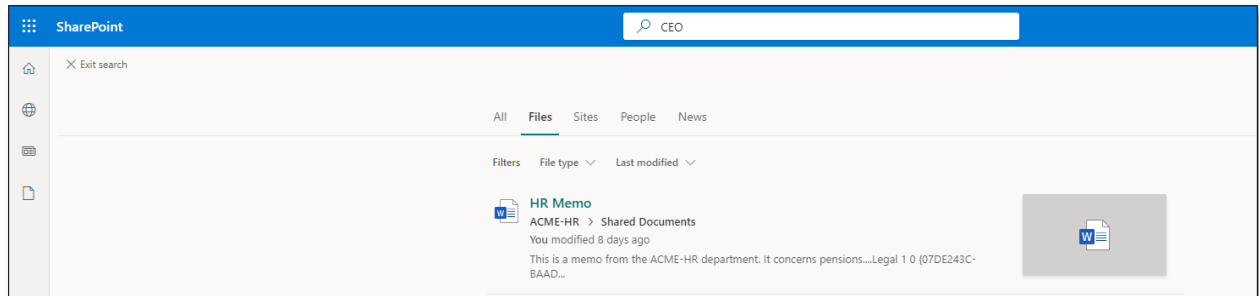
CEO × Type term to tag

Enterprise Keywords are shared with other users and applications to allow for ease of search and filtering, as well as metadata consistency and reuse

8. Once the keyword has been saved, it will appear in the column.

Documents						
	Name ▾	Modified ▾	Modified By ▾	ACME Dept ▾	Location ▾	Enterprise Key... ▾ + Add column ▾
	HR Memo.docx	A few seconds ago	Mark Collins	Legal	Dundee	CEO

9. Back on the SharePoint start page, if we search for CEO, up comes the document.



Please note the following helpful advice from Microsoft, 'The keywords you add are available to others when users access SharePoint lists or libraries. For example, when users type similar characters in the Enterprise Keywords column of the list, SharePoint displays the keyword in a suggestion message. And if you add an enterprise keywords column to a list or library, SharePoint copies any existing document tags into the enterprise keywords column when the documents are uploaded to the list or library. This helps synchronize existing keywords with the managed metadata features.'

For more information, see <https://support.microsoft.com/en-us/office/add-an-enterprise-keywords-column-to-a-list-or-library-314ce556-e4bf-4ef7-9939-6a1bedfc434a>

Check in, check out

When documents are uploaded to a library there are situations where you'll want to have complete control over the versioning and iterations of the files. In short, you don't want people to author documents at the same time; and when people do work on a document, you want to be able to revert to a previous version.

In SharePoint, this can be achieved by checking out a document.

1. Go to the Library settings for the document library and select Versioning Settings.

Settings • Versioning Settings

Content Approval
Specify whether new items or changes to existing items should remain in a draft state until they have been approved. [Learn about requiring approval.](#)

Document Version History
Specify whether a version is created each time you edit a file in this document library. [Learn about versions.](#)

Draft Item Security
Drafts are minor versions or items which have not been approved. Specify which users should be able to view drafts in this document library. [Learn about specifying who can view and edit drafts.](#)

Require Check Out
Specify whether users must check out documents before making changes in this document library. [Learn about requiring check out.](#)

Require content approval for submitted items?
☐ Yes ☒ No

Create a version each time you edit a file in this document library?
☒ Create major versions
 Example: 1, 2, 3, 4
☐ Create major and minor (draft) versions
 Example: 1.0, 1.1, 1.2, 2.0

Keep the following number of major versions:

☐ Keep drafts for the following number of major versions:

Who should see draft items in this document library?
☒ Any user who can read items
☐ Only users who can edit items
☐ Only users who can approve items (and the author of the item)

Require documents to be checked out before they can be edited?
☒ Yes ☐ No

OK Cancel

- At the bottom of the page, select Yes under 'Require documents to be checked out before they can be edited?'

Incidentally, this page also allows you to change the default limit of 500 versions for each document. For more about versioning, see here <https://docs.microsoft.com/en-us/microsoft-365/community/versioning-basics-best-practices>

- Next, let's return to Edit view for our document library and select Check in Comment and Check Out To.

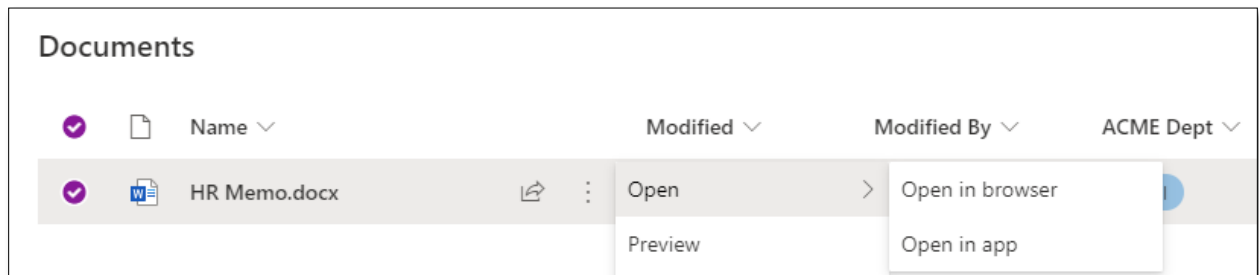
Columns
Select or clear the check box next to each column you want to show or hide in this view of this page. To specify the order of the columns, select a number in the Position from left box.

Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Type (icon linked to document)	1
<input checked="" type="checkbox"/>	Name (linked to document with edit menu)	2
<input checked="" type="checkbox"/>	Modified	3
<input checked="" type="checkbox"/>	Modified By	4
<input checked="" type="checkbox"/>	ACME Dept	5
<input checked="" type="checkbox"/>	Location	6
<input checked="" type="checkbox"/>	Enterprise Keywords	7
<input type="checkbox"/>	App Created By	8
<input type="checkbox"/>	App Modified By	9
<input checked="" type="checkbox"/>	Check in Comment	10
<input checked="" type="checkbox"/>	Checked Out To	11

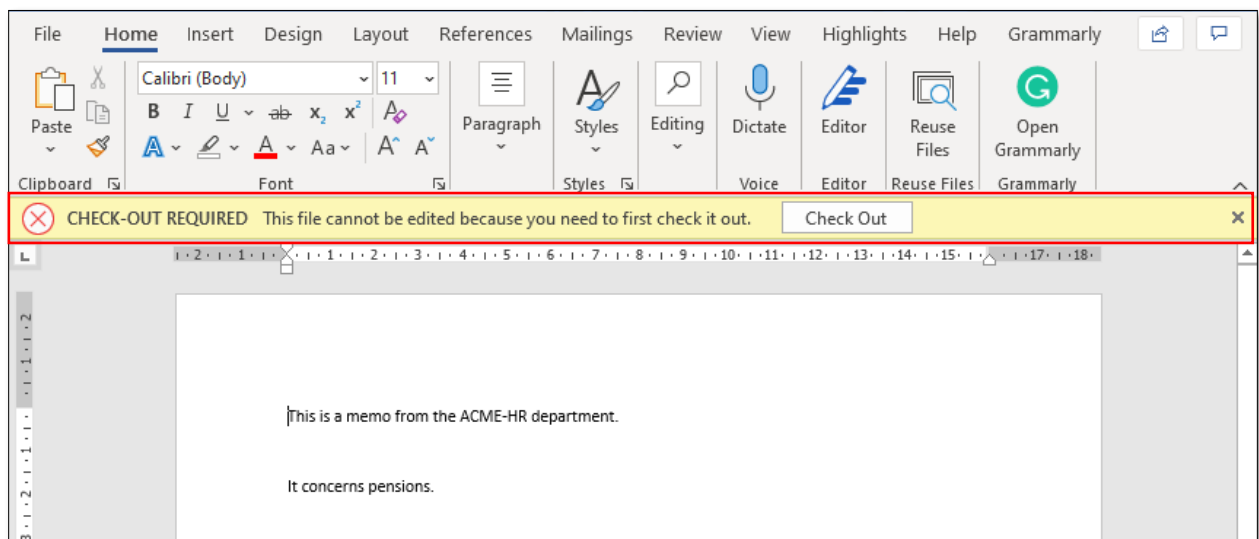
- Back in the library, these columns now appear.

Documents							
	Name	Modified	Modified By	ACME Dept	Location	Enterprise Key...	Check In Comm...
	HR Memo.docx	40 minutes ago	Mark Collins	Legal	Dundee	CEO	

- What happens next is that when we try to open the document ("Open in app"), it forces us to check it out.

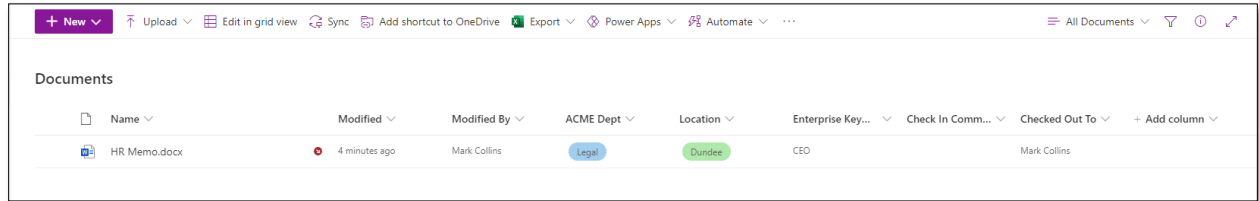


- In Word, a banner appears, and while we can read the document, we must check it out in order to change its content.



- While we check out the document and add our content, meanwhile, back in the document library, one column tells our colleagues that the document is checked out to a specific person. This means that other people cannot see the changes that we

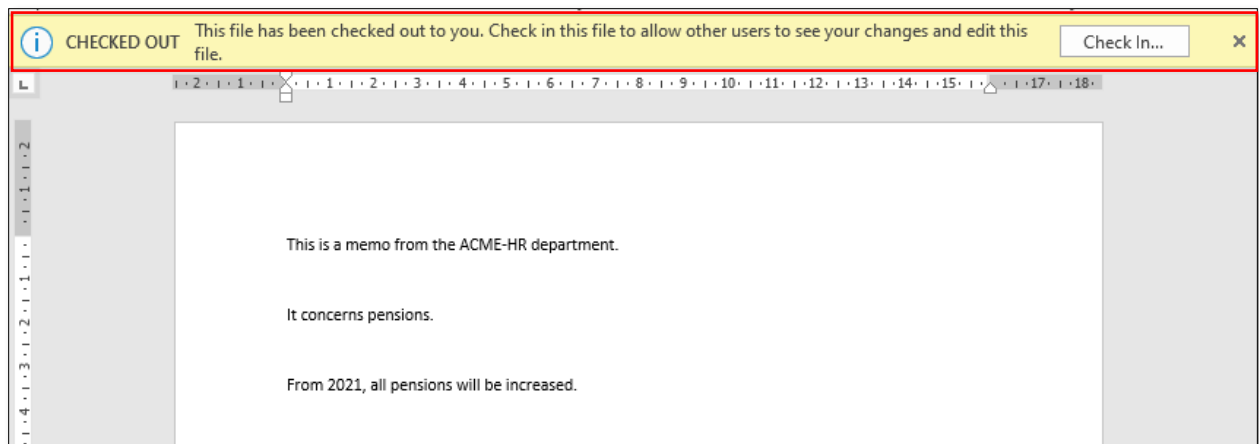
are adding to the document while it is checked out; they can only see a previous version of the document.



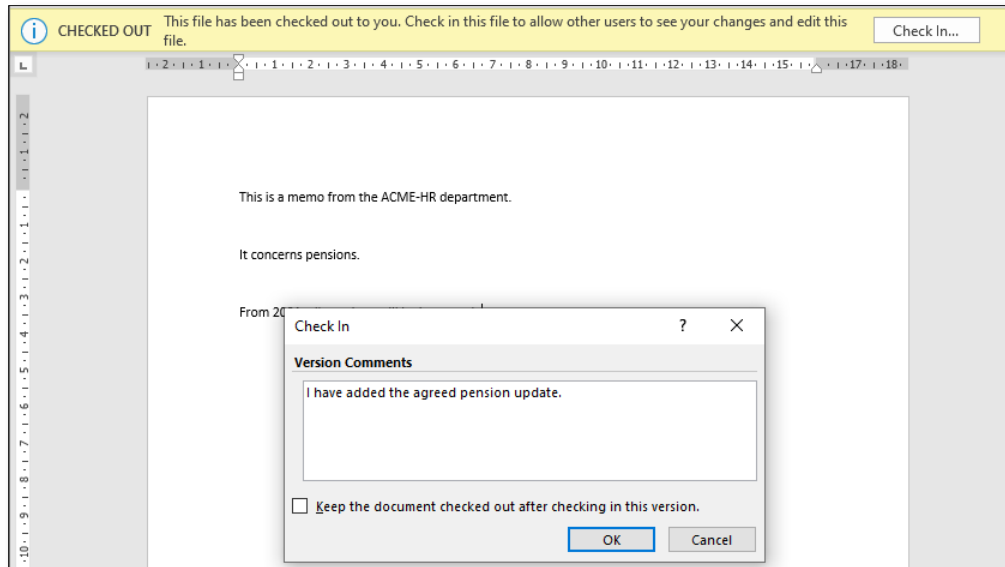
The screenshot shows the SharePoint document library interface. At the top, there is a navigation bar with options like 'New', 'Upload', 'Edit in grid view', 'Sync', 'Add shortcut to OneDrive', 'Export', 'Power Apps', and 'Automate'. Below this is a 'Documents' section with a table of documents. The table has columns for Name, Modified, Modified By, ACME Dept, Location, Enterprise Key, Check In Comm, and Checked Out To. A document named 'HR Memo.docx' is listed, modified 4 minutes ago by Mark Collins, with a 'Legal' department tag and a 'Dundee' location tag. The 'Checked Out To' column shows 'Mark Collins'.

Name	Modified	Modified By	ACME Dept	Location	Enterprise Key	Check In Comm	Checked Out To
HR Memo.docx	4 minutes ago	Mark Collins	Legal	Dundee	CEO		Mark Collins

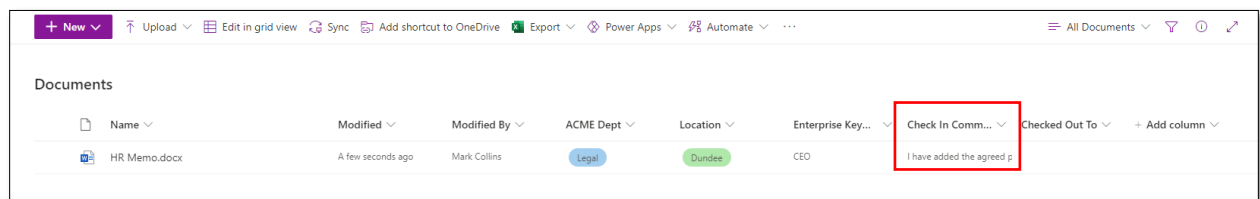
8. Once we have added the content, we check it in.



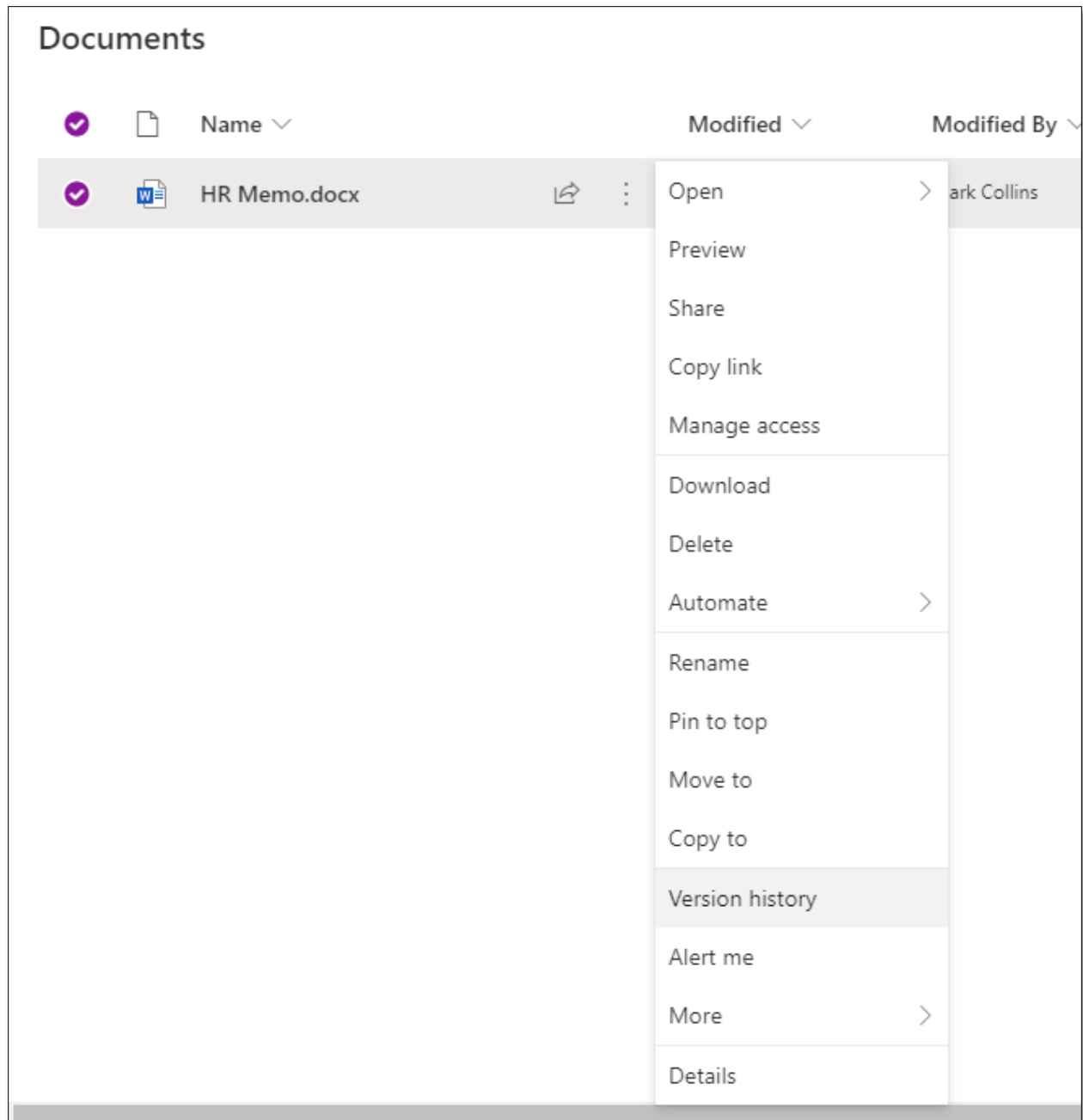
9. You are prompted to add a check in comment.



10. The comment is then added to the column in the SharePoint library.



11. Furthermore, if Version history is selected, you can see how many versions of the document have been created, and who has created each version.



12. In our example, Check in was only switched on after version 5.0; hence it has the only comment.

Version history						
Delete All Versions						
No. ↓	Modified	Modified By	Size	Comments		
6.0	5/8/2021 10:13 AM	<input type="checkbox"/> Mark Collins	21.5 KB	I have added the agreed pension update.		
5.0	5/8/2021 10:07 AM	<input type="checkbox"/> Mark Collins	21.4 KB			
4.0	5/8/2021 9:24 AM	<input type="checkbox"/> Mark Collins	23 KB			
	Enterprise Keywords	CEO				
3.0	5/8/2021 9:12 AM	<input type="checkbox"/> Mark Collins	22.4 KB			
	Location	Dundee				
2.0	5/8/2021 8:40 AM	<input type="checkbox"/> Mark Collins	19.9 KB			
	ACME Dept	Legal				
1.0	4/30/2021 7:29 AM	<input type="checkbox"/> Mark Collins	19.9 KB			

13. If I wanted to revert to version 5.0, which does not have the above changes, then I select it and pick Restore. Version 5.0 will be copied and become, in our example, version 7.0. Why? Because versioning never deletes a version, it always creates another one!

Version history						
Delete All Versions						
No. ↓	Modified	Modified By	Size	Comments		
6.0	5/8/2021 10:13 AM	<input type="checkbox"/> Mark Collins	21.5 KB	I have added the agreed pension update.		
5.0	5/8/2021 10:07 AM	<input type="checkbox"/> Mark Collins	21.4 KB			
4.0	5/8/2021 9:24 AM	<input type="checkbox"/> Mark Collins	23 KB			
	Enterprise Keywords	CEO				
3.0	5/8/2021 9:12 AM	<input type="checkbox"/> Mark Collins	22.4 KB			
	Location	Dundee				
2.0	5/8/2021 8:40 AM	<input type="checkbox"/> Mark Collins	19.9 KB			
	ACME Dept	Legal				
1.0	4/30/2021 7:29 AM	<input type="checkbox"/> Mark Collins	19.9 KB			

For more information on versioning, click here <https://docs.microsoft.com/en-us/microsoft-365/community/versioning-basics-best-practices>

For more information about the different types of columns that can be used in both document libraries and lists, see here <https://support.microsoft.com/en-us/office/list-and-library-column-types-and-options-0d8ddb7b-7dc7-414d-a283-ee9dca891df7>

Lists and Microsoft Lists

A list is another building block in SharePoint.

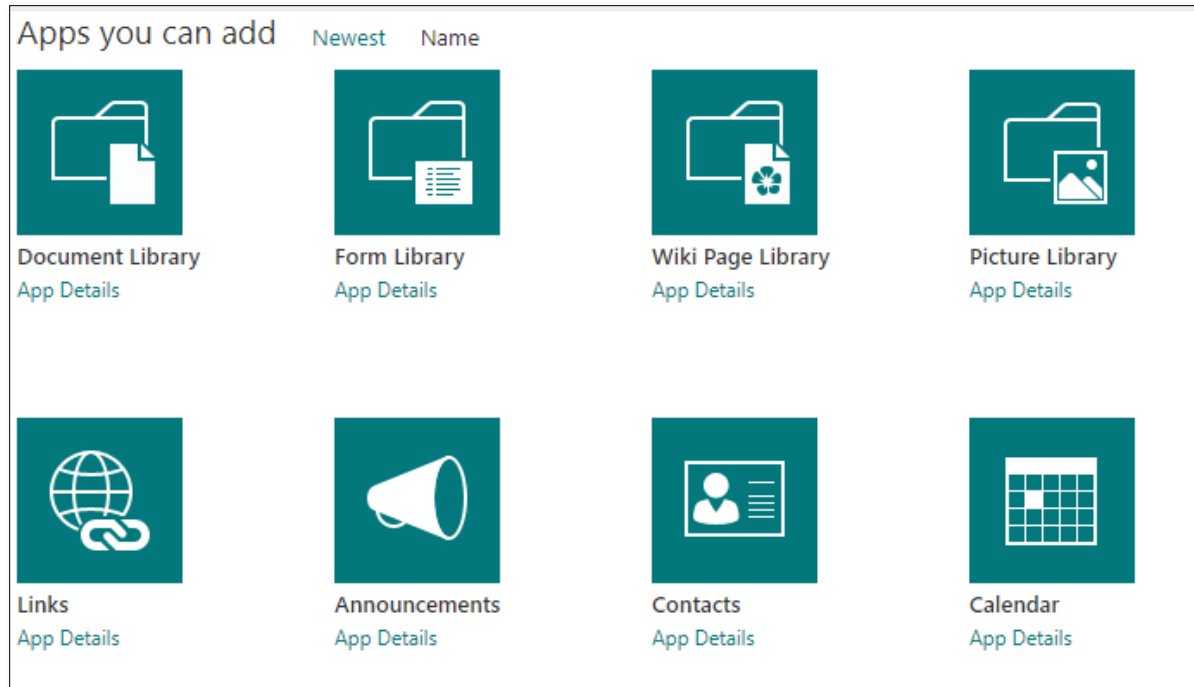
The best way to think about a list is to imagine it as an Excel file sitting in the browser, and when you add an item to the list, you are really adding data into cells.

There are many out-of-the-box lists such as Links, Announcements, Contacts, and Calendar; however, creating your own Custom list gives you the most options.

Lists allow you to:

- Add columns to capture data which then can be exported to Excel
- Add columns to filter data in order to bring up information quickly and efficiently
- To search using filtering, keywords and other metadata from the list itself or the SharePoint site where it and/or the SharePoint start page
- Multiple people can work on a list at the same time
- Lists have versioning, and you can also check out a list, too
- Lists can run formula like Excel but to a lesser extent. Lists are not supposed to be a substitute for Excel
- Like databases, lists can pull data from other lists via 'lookup columns'
- Every item which is saved to a list is, in fact, a data type, i.e. a specific kind of data such as a number, single line of text, time, date etc.

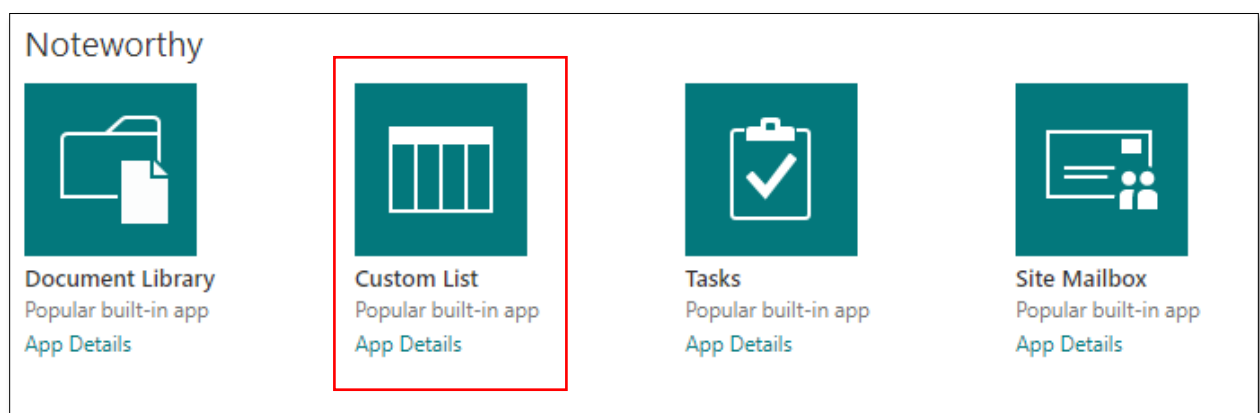
For more about lists, see here <https://support.microsoft.com/en-us/office/introduction-to-lists-0a1c3ace-def0-44af-b225-cfa8d92c52d7>



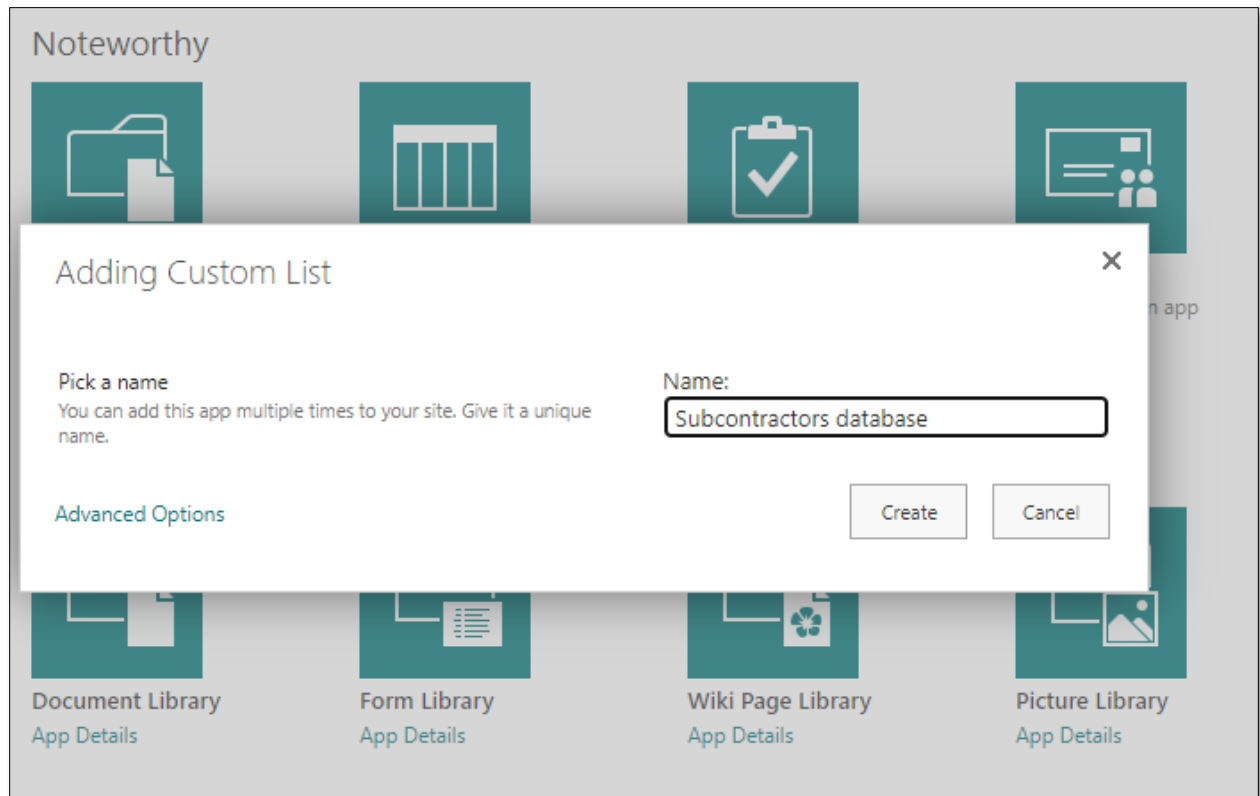
Custom List

Although you can use the other lists as a starting point or indeed for a specific purpose, the Custom List is a great option for building out a list from scratch.

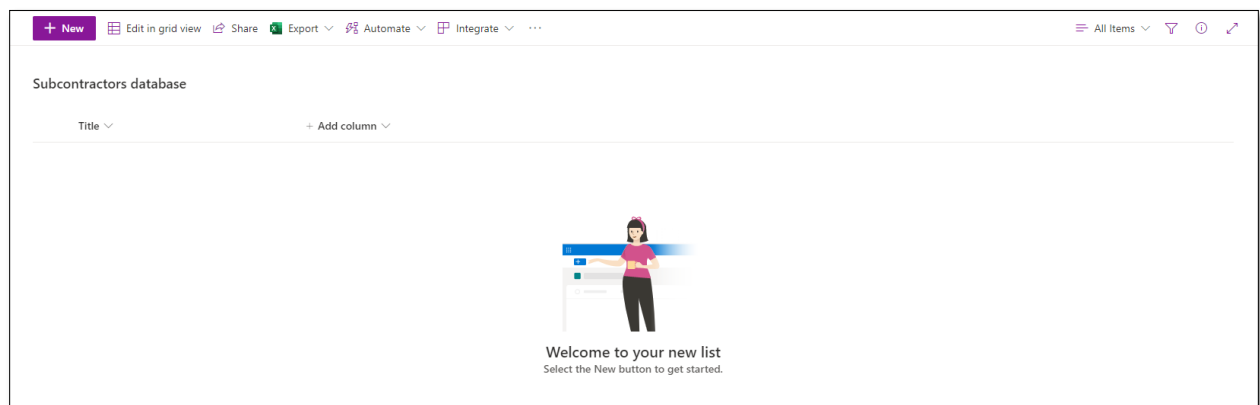
The Custom List option appears under Settings → Site contents → Noteworthy:



We're going to create a list of our Subcontractors by clicking on our list and giving it a name.



Once we do, it appears in Site contents; click on the list, and you'll see it in its raw form.



Notice the + Add column option. It's similar to the column we saw in the document library, and we're going to add the below columns.

Column name	Column type
First name	Single line of text
Last name	Single line of text
Area covers	Choice: Dublin, Dundee, Manchester
Skill	Choice: Installer, Trainer, Support
Hourly rate	Currency
Mobile	Single line of text
Misc	Multiple lines of text
Transport	Choice: Car, Van, Truck

And here is our finished list with some data inserted.

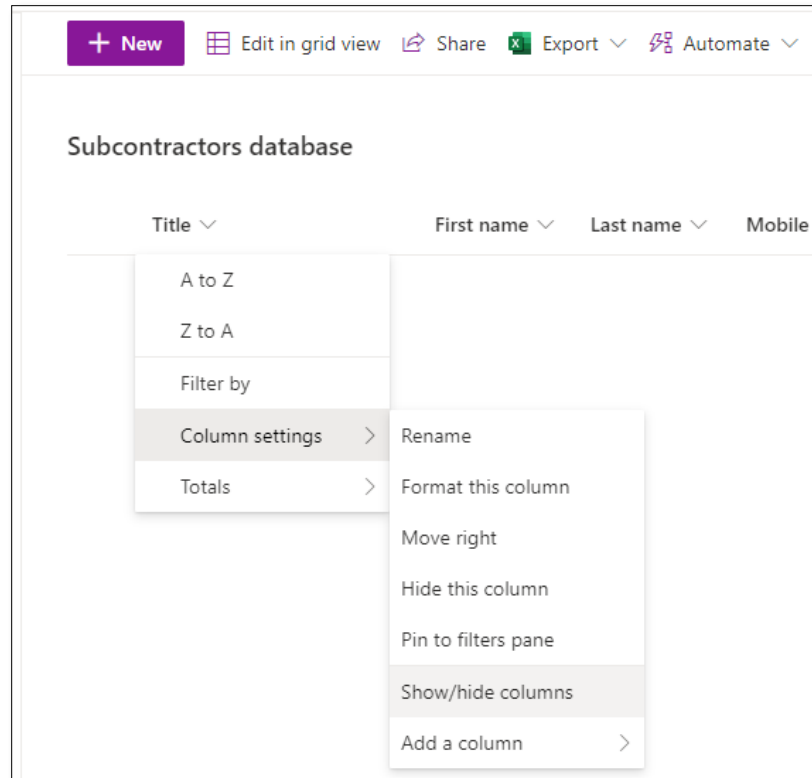
Subcontractors database									
<input type="radio"/>	First name ▾	Last name ▾	Mobile ▾	Area cov... ▾	Transport ▾	Skill ▾	Hourly rate ▾	Misc ▾	+ Add Column ▾
<input type="radio"/>	John	Smith	3,434,677	Dublin	Car	Installer	£21.00	Very good with clients.	
	James	Johnson	777,654	Dublin	Van	Installer	£22.00	Hard to work with, but good.	
	Mary	Williams	234,234	Dublin	Car	Installer	£18.00	Nice all round.	
	Robert	Brown	654,367	Dundee	Truck	Trainer	£19.00	Avoid if possible.	
	Linda	Jones	434,567	Manchester	Car	Trainer	£17.00	Nice all round.	

Before we look at filtering, a word about the title column.

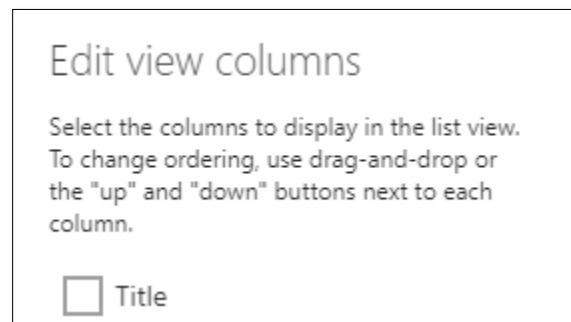
The Title column

The Title column by default 'requires information', i.e. it must contain data before you can save your row. However, we can switch off this requirement and hide the column.

1. Select the title column, and hide:



2. Deselect the column.



3. However, out of sight isn't out of mind, and so we have to go to Library settings and scroll down to Columns and tweak it slightly.

Columns		
A column stores information about each item in the list. The following columns are currently available in this list:		
Column (click to edit)	Type	Required
Title	Single line of text	✓
First name	Single line of text	
Last name	Single line of text	
Area covers	Choice	
Skill	Choice	
Hourly rate	Currency	
Mobile	Number	
Misc	Multiple lines of text	
Enterprise Keywords	Managed Metadata	

- Once you click on Title, check 'No' under 'Require that this column contains information'.

ACME-Contracts
EDIT LINKS

Settings ▸ Edit Column ⓘ

Name and Type
Type a name for this column.

Column name:

The type of information in this column is:
Single line of text

Additional Column Settings
Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:
☐ Yes
☒ No

Our finished list:

Subcontractors database							
First name ▾	Last name ▾	Mobile ▾	Area cov... ▾	Transport ▾	Skill ▾	Hourly rate ▾	Misc ▾
John	Smith	2323332	Dublin	Car	Installer	£21.00	Very good with clients.
James	Johnson	777654	Dublin	Van	Installer	£22.00	Hard to work with, but good.
Mary	Williams	234234	Dublin	Car	Installer	£18.00	Nice all round.
Robert	Brown	654367	Dundee	Truck	Trainer	£19.00	Avoid if possible.
Linda	Jones	434567	Manches...	Car	Trainer	£17.00	Nice all round.
William	Davis	435576	Dundee	Car	Installer	£23.00	

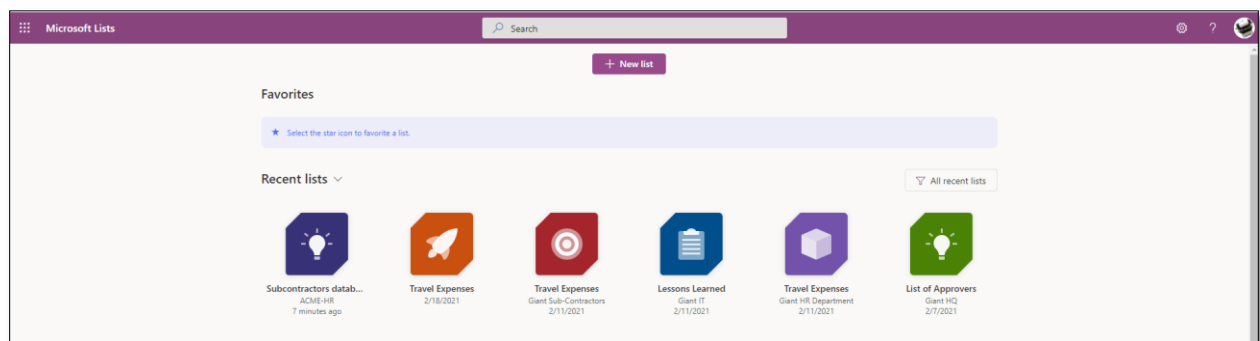
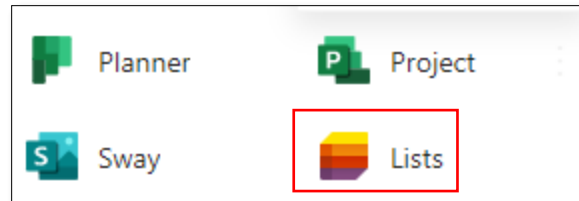
With our list we can:

- Search structured data in Areas covers, Transport and Skill
- Filter first and last names
- Filter hourly rates
- Add free, unstructured data under Misc to capture notes about each subcontractor

Microsoft lists

Microsoft lists are a new product and are essentially SharePoint lists, but you can use them without actually being in SharePoint.

If you have created a SharePoint list within SharePoint you will see that list once you go to the App launcher and then select the Microsoft List icon:



For example, the Subcontractors list above appears in Microsoft Lists, and when we click on it, here's the view:

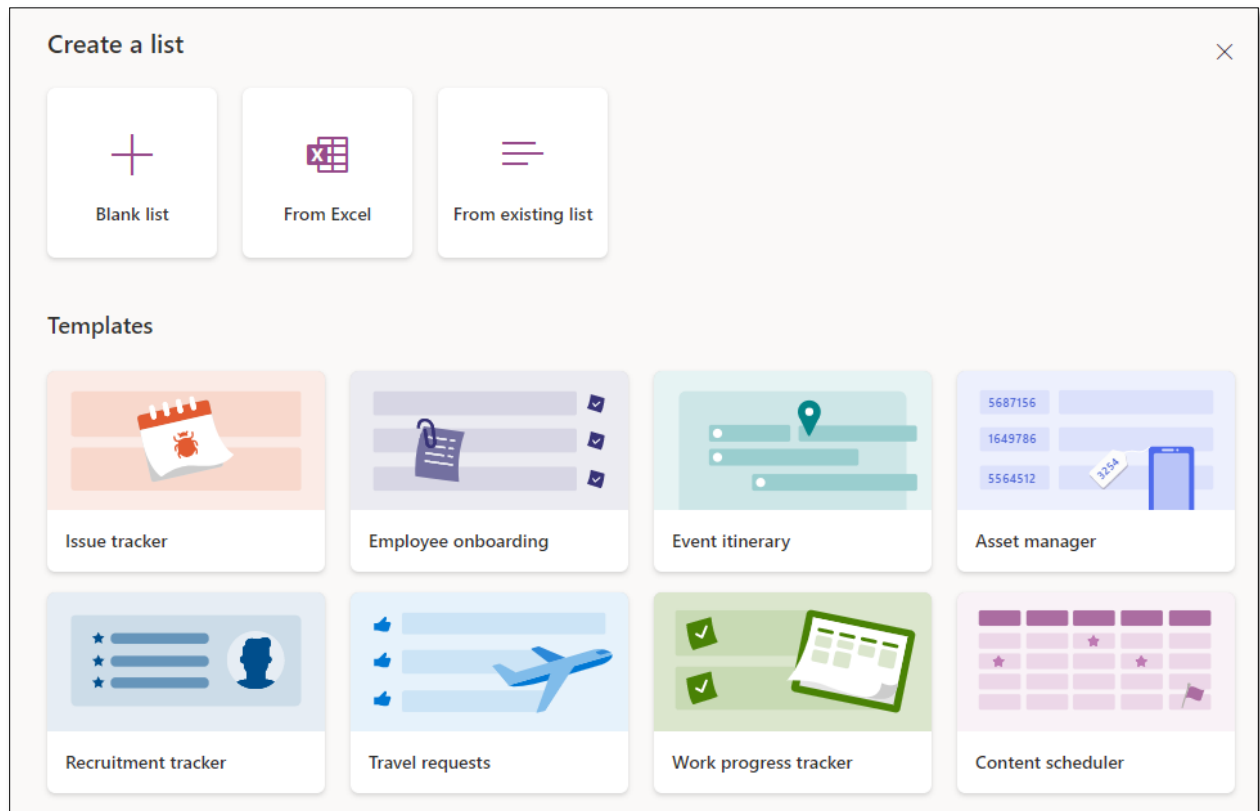
First name	Last name	Mobile	Area cov...	Transport	Skill	Hourly rate	Misc
John	Smith	2323332	Dublin	Car	Installer	£21.00	Very good with clients.
James	Johnson	777654	Dublin	Van	Installer	£22.00	Hard to work with, but good.
Mary	Williams	234234	Dublin	Car	Installer	£18.00	Nice all round.
Robert	Brown	654367	Dundee	Truck	Trainer	£19.00	Avoid if possible.
Linda	Jones	434567	Manches...	Car	Trainer	£17.00	Nice all round.

All of the most common features can be performed from this end, and whatever changes are made, they will appear in the original list on the original SharePoint site.

Lists can also be saved to My lists and will not appear on any SharePoint site.

Let's create a list with Microsoft Lists.

1. Select + New list and choose a template.



2. There are a number of choices:
 - Blank list – build your list from scratch
 - From Excel – base it on an Excel file
 - From existing list – base it on an existing list
 - Templates – start with an existing template for a specific purpose
3. We're going to select a Blank list. We give it a name, description and a colour. We save it to My lists and not a SharePoint site.

Name *

×

My Travel Expenses

Description

Keep track of work traveling

Choose a color

✓

Choose an icon

Save to *

🏠

My lists

▼

<
Back

Create

Cancel

4. Next, we're going to add the following columns.

Column name	Column type
Title	In this example, we're going to keep the Title column as the tile of the travel
Destination	Single line of text
Distance	Number
Milage rate	Currency

Column name	Column type
Purpose	Multiple lines of text
Date	Date and time
Total cost	Calculated column

5. All of the columns types have been used in earlier examples, apart from 'Total cost' and its data type – the calculated column. To create this, add a column and select More. As in the screenshot below, add in the following formula: [Distance]*[Mileage rate].

Name and Type

Type a name for this column, and select the type of information you want to store in the column.

Column name:

Total cost

The type of information in this column is:

- ☐ Single line of text
- ☐ Multiple lines of text
- ☐ Choice (menu to choose from)
- ☐ Number (1, 1.0, 100)
- ☐ Currency (\$, ¥, €)
- ☐ Date and Time
- ☐ Lookup (information already on this site)
- ☐ Yes/No (check box)
- ☐ Person or Group
- ☐ Hyperlink or Picture
- ☒ Calculated (calculation based on other columns)
- ☐ Image
- ☐ Task Outcome

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Formula:

[Distance]*[Mileage rate]

Insert Column:

Compliance Asset Id
Created
Date
Destination
Distance
Mileage rate
Modified
Title

Add to formula

The data type returned from this formula is:

- ☐ Single line of text
- ☐ Number (1, 1.0, 100)
- ☒ Currency (\$, ¥, €)
- ☐ Date and Time
- ☐ Yes/No

6. Add an item to your list.

Save Cancel Copy link

New item

Title *

Trip to London

Destination

London

Distance

300

\$€ Mileage rate

.48

Purpose

Visiting clients in London for the day.

Date

11/05/2021

Attachments

Add attachments

Save

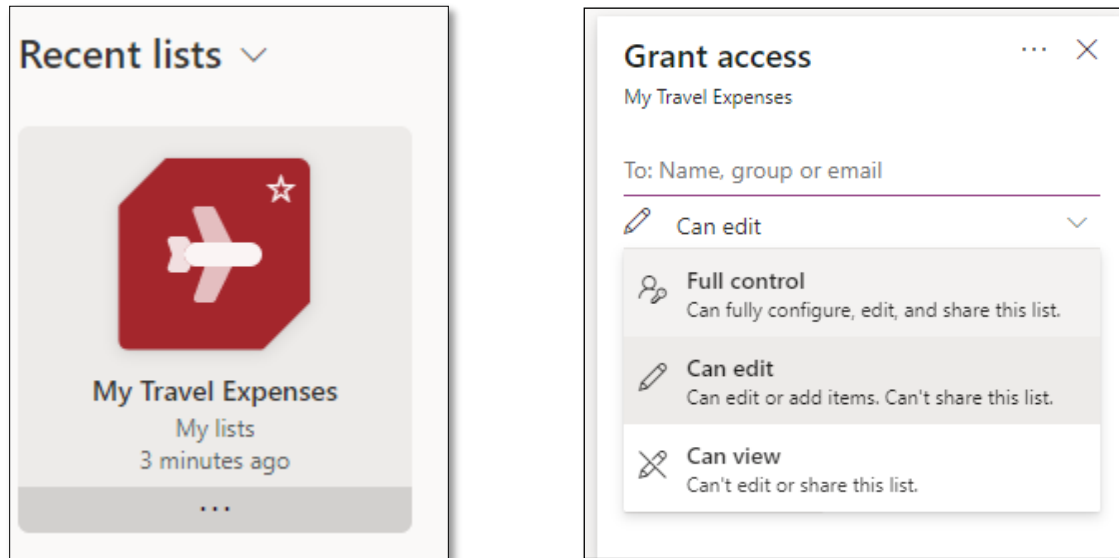
Cancel

7. Once the list is saved, the item is added as a row, and the calculated column multiplies Destination and Mileage rate.

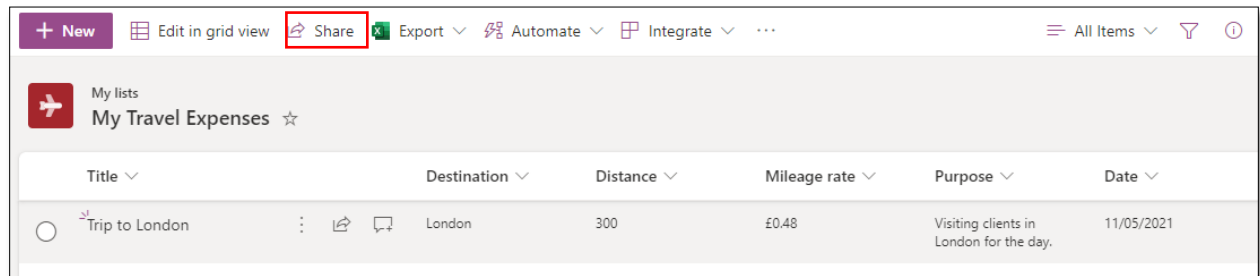
<div><div>My lists</div><div>My Travel Expenses ☆</div></div>						
Title ▾	Destination ▾	Distance ▾	Mileage rate ▾	Purpose ▾	Date ▾	Total cost ▾
Trip to London	London	300	£0.48	Visiting clients in London for the day.	11/05/2021	£144.00

Sharing your list

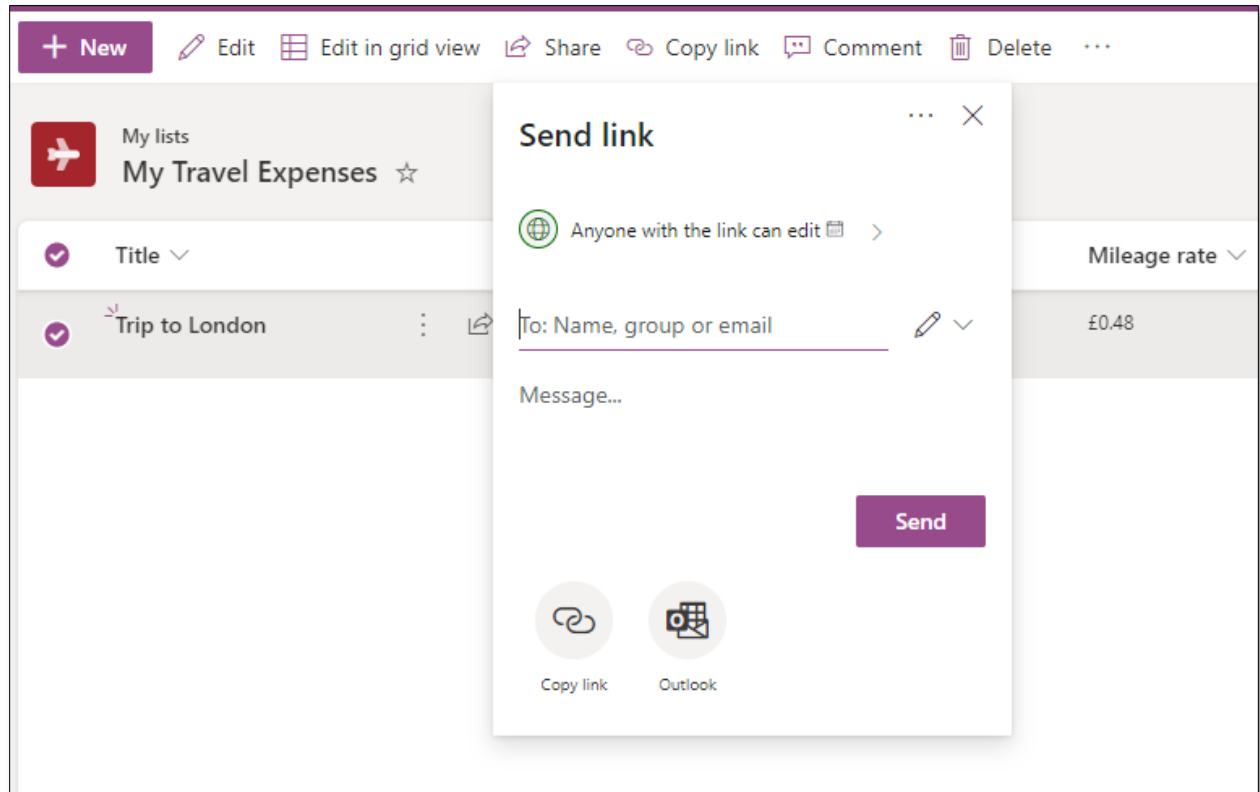
If we want to share the list, we can do so by selecting the '...' three dots and pick a person or 365 group along with a suitable permission level.



Or we can select Share at the top of the screen:



We can also share an item from a list by selecting the '...' and selecting Share.



Note: If your list is shared to My lists, you have different sharing options as they are based on your OneDrive options. If you try to share a list that is saved in SharePoint, the site permissions in place will govern the list.

For more on lists, see <https://resources.techcommunity.microsoft.com/microsoft-lists/>

Simoda Limited
Eagle Works
32 Cotton Mill Walk
Kelham Island
Sheffield
S3 8DH

0114 553 3600

simoda.co.uk