

**collab365.**

# BEGINNER EBOOK



**collab365.**

# SharePoint Power User Guide

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## Introduction

SharePoint is a versatile, web-based platform from Microsoft designed to enhance collaboration, document management, and content sharing within organizations. At its core, SharePoint acts as a centralized hub where teams can create, manage, and share documents and data seamlessly. It integrates deeply with Microsoft 365, offering robust capabilities such as customizable intranet sites, secure file storage, and workflow automation. Whether you are managing projects, coordinating content, or building custom applications, SharePoint provides the tools to streamline processes and improve productivity.

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 or those aspiring to become a SharePoint Power User, someone who has a role that sits between a Microsoft 365 administrator and an end-user of SharePoint.

A Power 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 Power 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

**RESEARCH & DESIGN**

### Your onboarding journey starts here!

Welcome! We are so happy you are here. Consider this your home base to find the support and resources you need to be successful on your new team.

Customization guidance: Replace the image with the Highlighted content web part to display a video from [Stream](#).

**Welcome to R&D**  
288K views • 13K likes • 3 comments

**News & announcements**  
+ Add  
**Power Apps StepUp Challenge**  
A new course has been added for all team members to...  
Connor Deasey April 29

**Upcoming events** [See all](#)  
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**Create an event**  
When you add an event, it will show here where your readers can see it.

Month 01 Title of event  
Tuesday 12:00 AM - 1:00 PM

Month 01 Title of event  
Tuesday 12:00 AM - 1:00 PM

Month 01 Title of event  
Tuesday 12:00 AM - 1:00 PM

**Meet the onboarding team**

**Megan Bowen**  
Marketing manager

**Lynne Robbins**  
Planner

**Lee Gu**  
Director

**Use the checklist**  
  
Use the onboarding checklist as your guide to the first 30 days.  
[View the checklist](#)

**Start learning**  
  
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**Review resources**  
  
Check out resources, documents, and forms.  
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## 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.

# SharePoint Communication Sites vs Teams Sites vs Hub Sites – Which should I use?



**Team site**  
Create a private space to collaborate with your team.

- Track and stay updated on project status
- Share team resources and co-author content
- All site owners and members publish site content
- Can connect to other Microsoft 365 products



**Communication site**  
Share information that engages a broad audience.

- Create a portal or subject-focused site
- Engage dozens or thousands of viewers
- Few content authors and many site visitors

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>

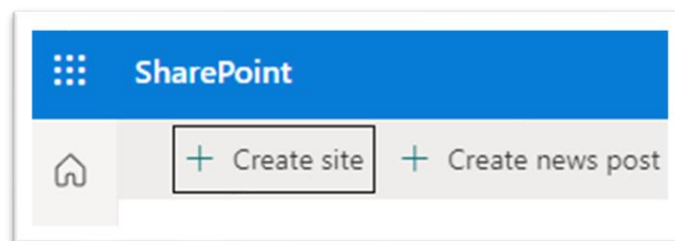
It's important to take time to consider what site you should use and why. If you don't plan your SharePoint rollout carefully, you may run into problems at a later stage.

**Take time to consider the following:**

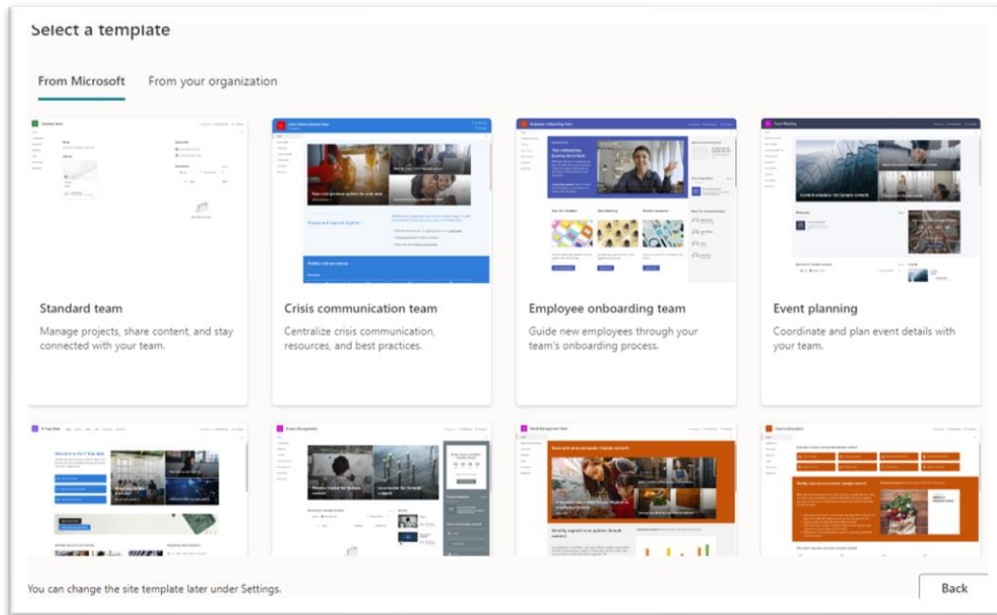
- What departments need a SharePoint site – perhaps some departments might only need a page
- Who has the authority to create SharePoint sites?
- Should you use Teams instead of a SharePoint site for certain situations?
- And once your SharePoint sites are up and running, who will be their 'champions'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

**How to set-up a SharePoint Team Site**

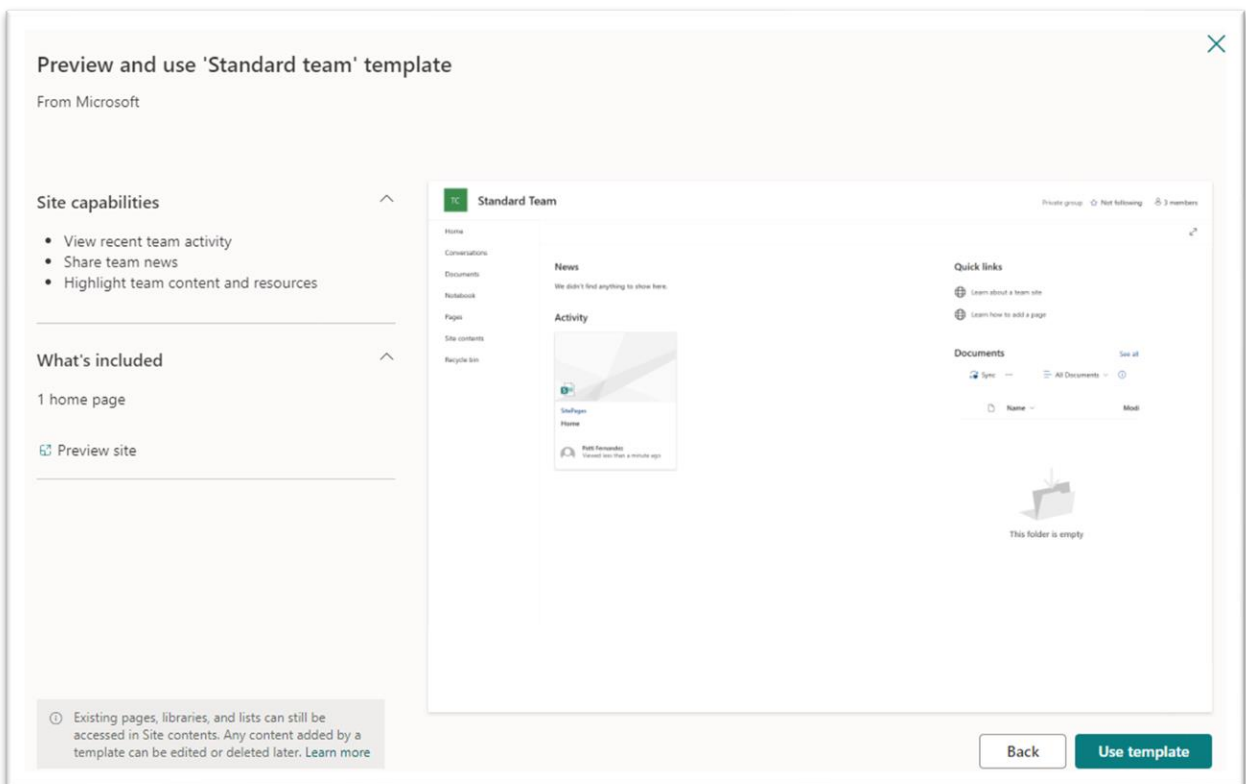
Let's start with the oldest and most fundamental SharePoint site – the Team site. We can create both types of sites by selecting Create site from the SharePoint Dashboard.



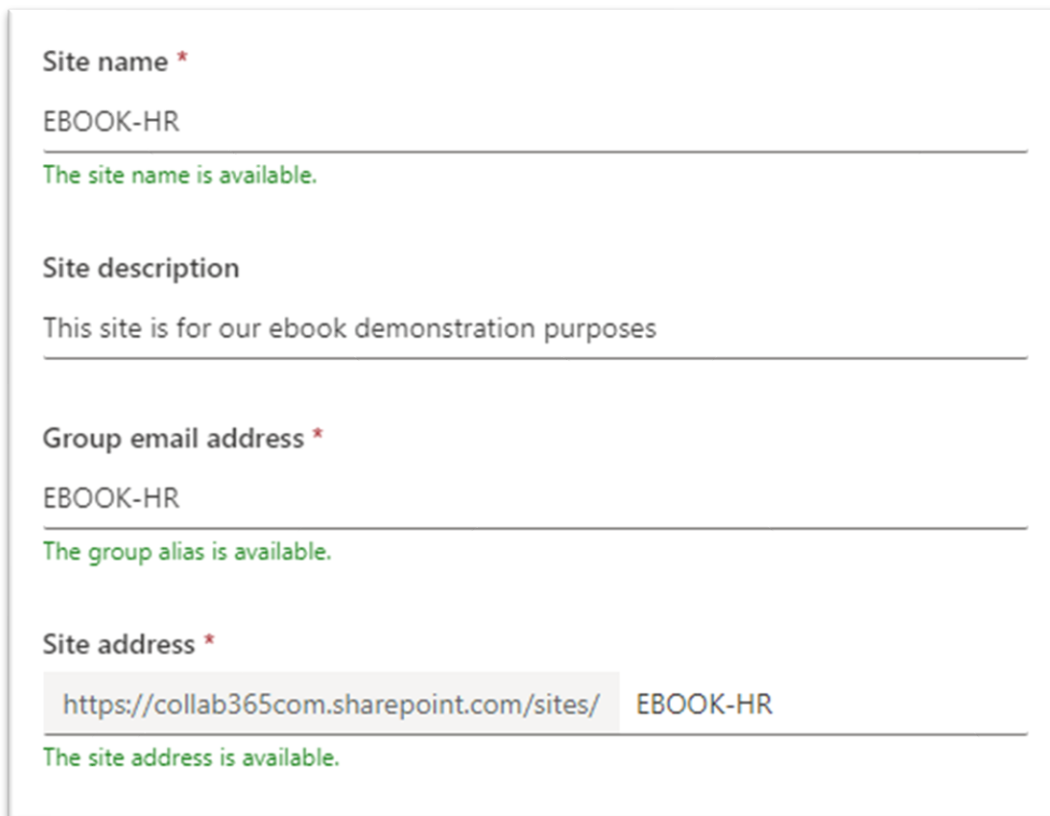
After selecting Team Site, we are given options to use a number of different templates, or we can use the standard team option to use a barebones template with minimal preconfigured pages.



We can then see a list of site capabilities and features prebuilt for us as part of the template. We can also view a preview of the site before we create it to get a feel for our site. When ready select Use template.



We can now provide details for our site including its privacy options and adding members to the site.



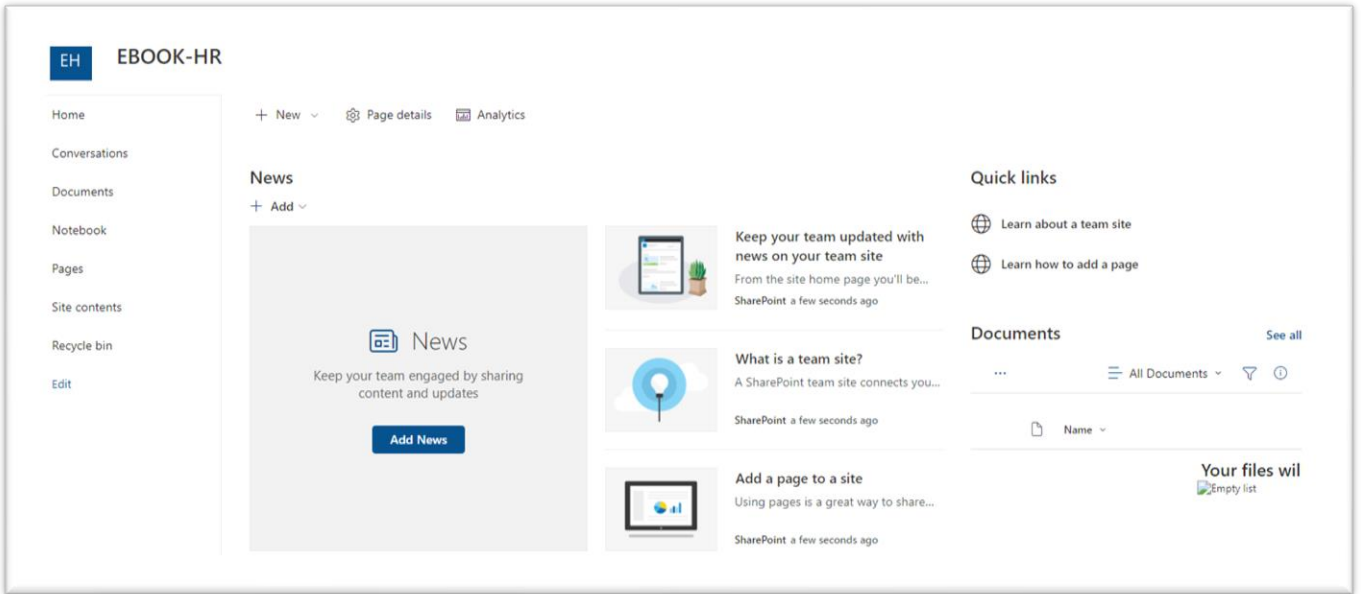
The screenshot shows a form for creating a SharePoint site. It contains four main sections, each with a label, a text input field, and a confirmation message:

- Site name \***: The input field contains "EBOOK-HR". Below it, a green message reads "The site name is available."
- Site description**: The input field contains "This site is for our ebook demonstration purposes".
- Group email address \***: The input field contains "EBOOK-HR". Below it, a green message reads "The group alias is available."
- Site address \***: The input field contains "https://collab365com.sharepoint.com/sites/ EBOOK-HR". Below it, a green message reads "The site address is available."

**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.

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.



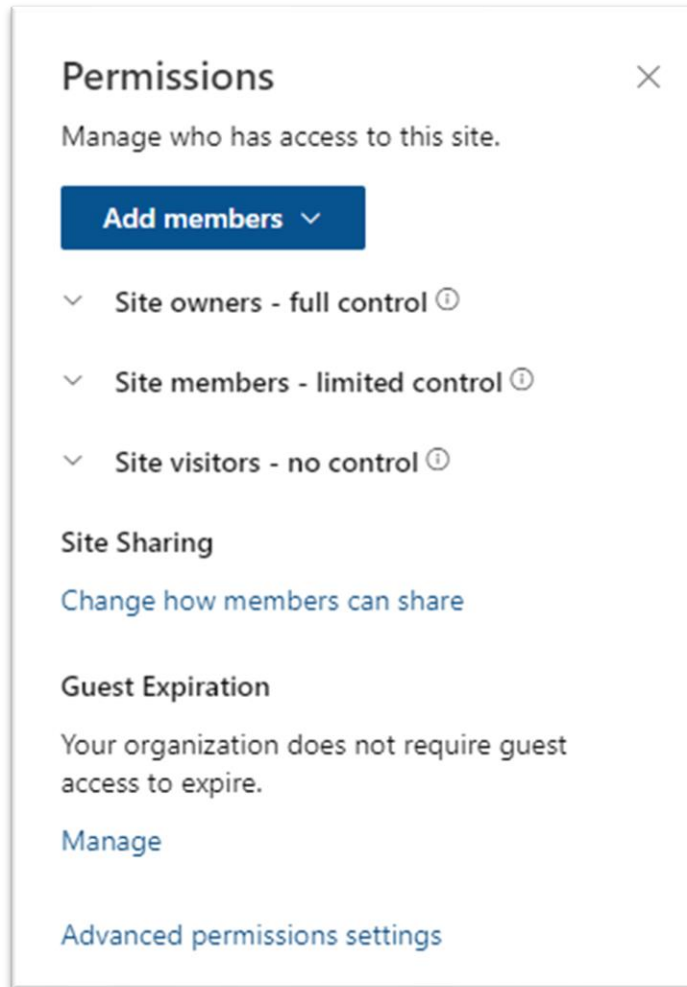
When you create a Team (private group) site, you are also creating an Office 365 group which means you'll may get an email to confirm this.

## How to manage people and set permissions for your SharePoint Team site

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

Add them to one of three SharePoint groups: Owners, Members, and Visitors or 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 Settings → Site Permissions.



When you select Invite people, you are given two choices:

- Add members to group
- 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.*

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 EBOOK-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 Entra 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>

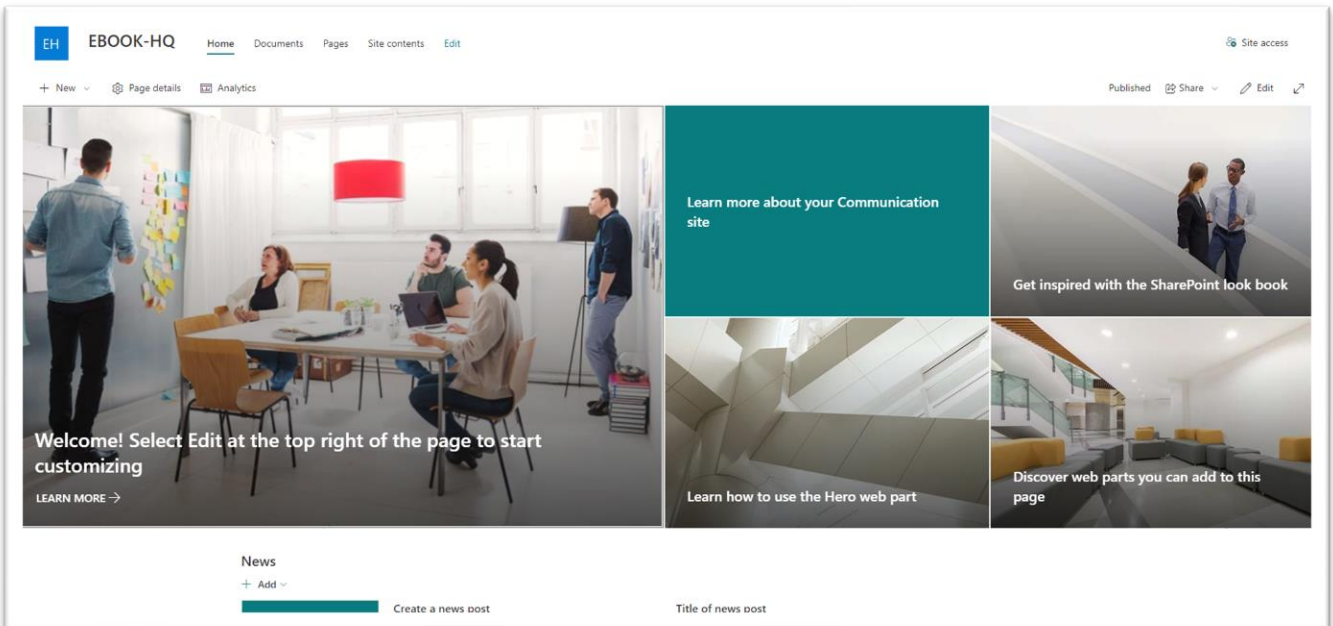
Title	Default Permission Group	Used For
Owner	Full control	People who must be able to manage site permissions, settings, and appearance.
Member	Edit and contribute	People who must be able to edit site content. Permission level depends on the site template that was used to create the site.
Visitor	Read only	People who must be able to see site content, but not edit it.

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

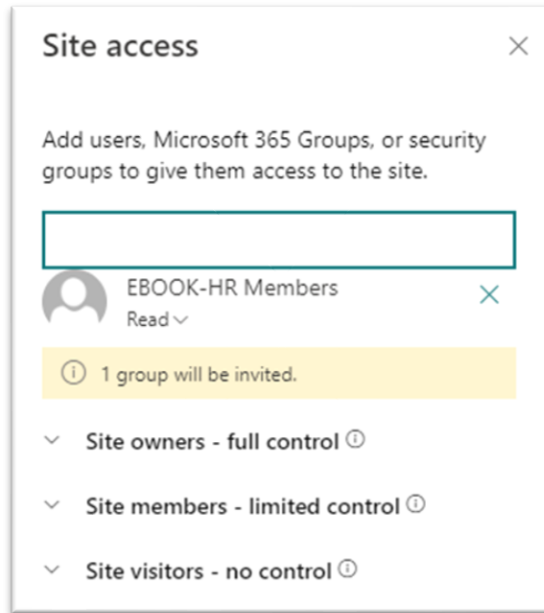
## How to set-up a SharePoint Communication site

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 EBOOK-HQ (which was created following the same wizard we used for creating a Teams Site).



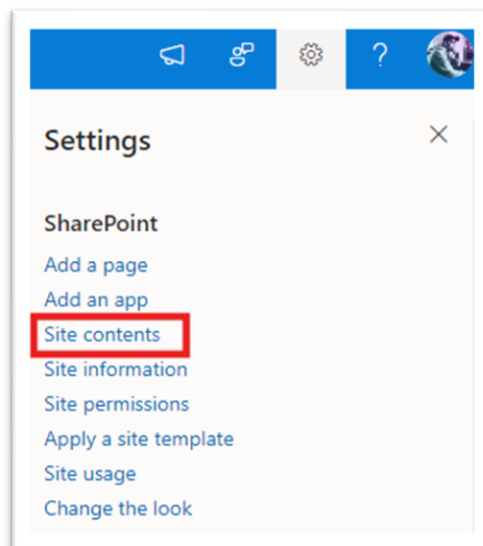
Now that we have our EBOOK-HQ Communications site, let's add the EBOOK-HR group to it. Select Site Access (in the top right of the site) then, enter and search for EBOOK-HR Members.

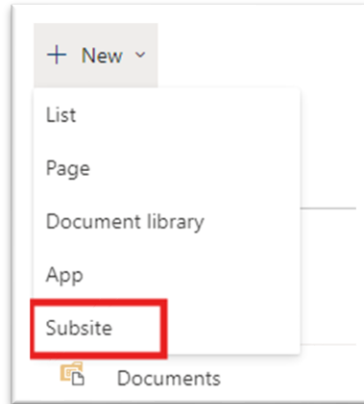


All the members of the EBOOK-HR Office 365 group will now be able to Read the Communication site. When you add people to a SharePoint group, they will receive an email.

### How to create a SharePoint subsite

Let's create a subsite to our EBOOK-HR site. On the homepage, select the 'gear' icon → Site content then, select New → Subsite.





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 EBOOK-Contracts.

A screenshot of the 'New SharePoint Site' configuration page. The page has a left-hand navigation pane with links: Home, Conversations, Documents, Notebook, Pages, Site contents, and Recycle Bin. The main content area is titled 'Site contents > New SharePoint Site' and contains several sections:

- Title and Description:** 'Title:' field contains 'EBOOK-Contracts'. 'Description:' field is empty.
- Web Site Address:** 'URL name:' field contains 'https://collab365com.sharepoint.com/sites/EBOOK-HR/Contracts'.
- Template Selection:** 'Select a language:' dropdown is set to 'English'. 'Select a template:' dropdown is open, showing options: Collaboration, Enterprise, Duet Enterprise, Team site (no Microsoft 365 group) (selected), Team site (classic experience), and Project Site. Below the dropdown is the text: 'A site with no connection to a Microsoft 365 Group.'
- Permissions:** 'User Permissions:' section has two radio buttons: 'Use same permissions as parent site' (selected) and 'Use unique permissions'.

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

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

The screenshot shows the SharePoint interface for the 'EBOOK-Contracts' site. The left-hand navigation pane includes 'Home', 'Notebook', 'Documents', 'Pages', 'Site contents', 'Recycle bin', and 'Edit'. The main content area features a 'News' section with a 'Keep your team updated with news on your team site' message and an 'Add News' button. Below this is an 'Activity' section with three cards: 'The new EBOOK-HR group is ready', 'EBOOK-Contracts' (created by Connor Deasey), and 'View and share files'. On the right, there are 'Quick links' for 'Learn about a team site' and 'Learn how to add a page', and a 'Your files will' section with an 'Empty list' message. The top right corner shows 'Published', 'Share', 'Edit', and 'Following' options.

Technically, we have created three 'site collections', and one of the site collections (EBOOK-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 EBOOK-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.

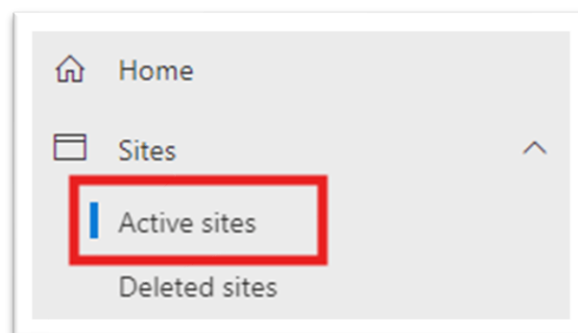
### How to set-up a SharePoint Hub site

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://learn.microsoft.com/en-us/sharepoint/planning-hub-sites>)

To turn our EBOOK-HQ communications site into a hub site, you must have access to the SharePoint admin center. You can reach the SharePoint Admin Center from your Microsoft Admin Center in the waffle menu.

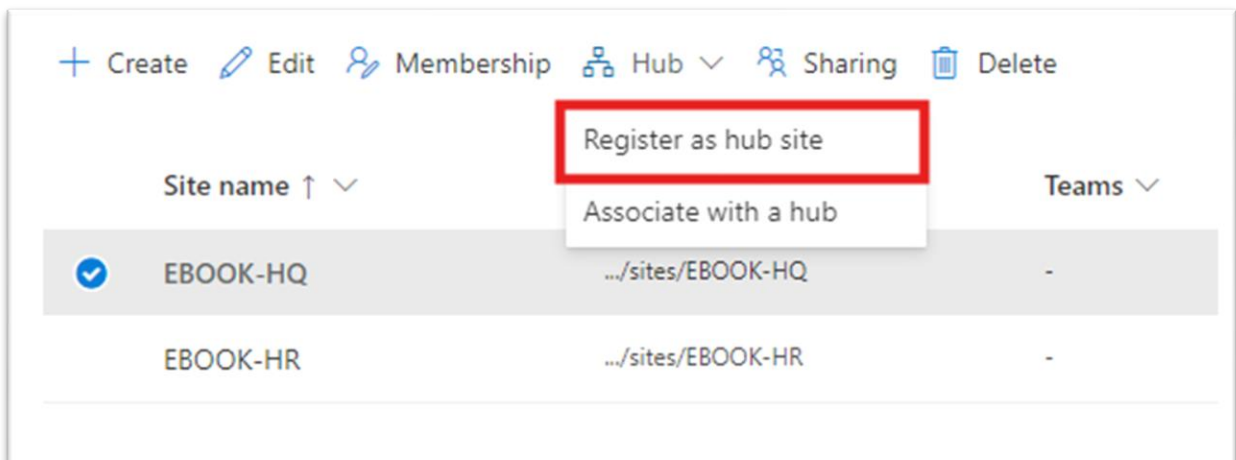
In the SharePoint admin center, let's search for the three sites that we've created by selecting Active sites.



Then search for your SharePoint site in the search bar on the right-hand side.

Site name ↑ ▾	URL ▾
EBOOK-HQ	.../sites/EBOOK-HQ
EBOOK-HR	.../sites/EBOOK-HR

Select the site which you want to register as a hub. In our case, it's the EBOOK-HQ site. Under Hub select Register as a hub site.



The screenshot shows the SharePoint site management interface. At the top, there are navigation icons for Create, Edit, Membership, Hub, Sharing, and Delete. Below these is a table with columns for Site name, URL, and Teams. The 'EBOOK-HQ' site is selected with a blue checkmark. A dropdown menu is open under the 'Hub' icon, with 'Register as hub site' highlighted in a red box. The 'Associate with a hub' option is also visible in the dropdown.

Site name ↑ ▾	URL ▾	Teams ▾
✓ EBOOK-HQ	.../sites/EBOOK-HQ	-
EBOOK-HR	.../sites/EBOOK-HR	-

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

### Register as hub site

Make this site into a hub site to connect related sites and give them a shared experience.  
[Learn more about associating hubs](#)

Hub name \*

People who can associate sites with this hub

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

+ Create   Edit   Membership   Hub ▾   Sharing   Delete

Site name ↑ ▾	Register as hub site	Teams ▾
EBOOK-HQ	Associate with a hub .../sites/EBOOK-HQ	-
<input checked="" type="checkbox"/> EBOOK-HR	.../sites/EBOOK-HR	-

Then select your site hub from the list of site hubs.

### 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

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

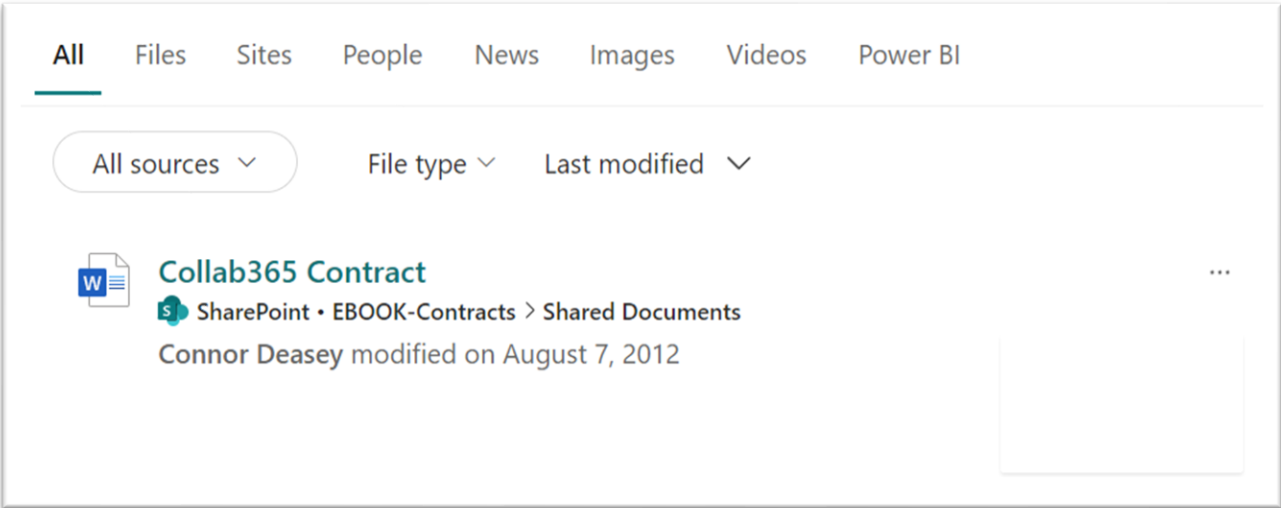
On each SharePoint site (and subsite whose parent is associated), this is evident in the navigation. However, by default, the hub site does not list in its navigation menu what sites are associated with it; hence, the reason you see Add link.

### 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 EBOOK-HR site. There’s a file named Collab365 Contract on the EBOOK-HR subsite (EBOOK-Contracts), and we want to find it by searching for the name on the parent site.

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



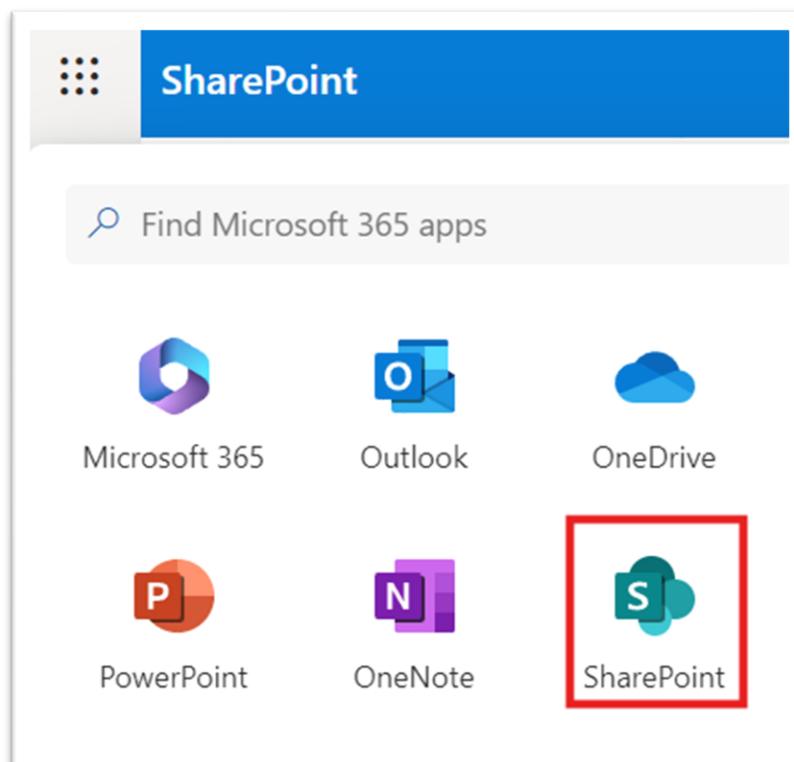
If I do the same search from the EBOOK-HQ hub site, it brings it up too. When the search is returned, it details that the Organization is EBOOK-HQ (i.e. the hub site relationship), and then it lists EBOOK-Contracts → Shared Documents.

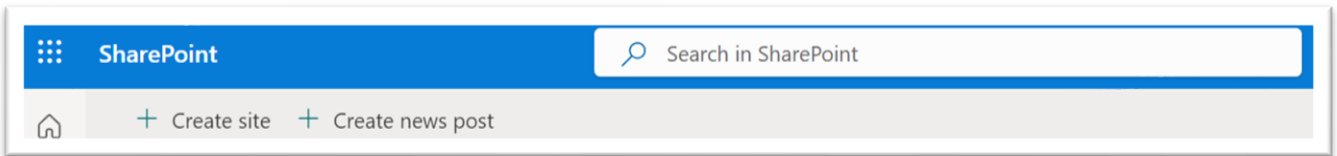
**Note:** As the EBOOK-HR site is associated with the EBOOK-HQ hub site, when you search in EBOOK-HQ you will get results from the EBOOK-HR site. This is one of the benefits of hub sites and their associated sites.

### 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 waffle menu or the 'app launcher'.





When you search here:

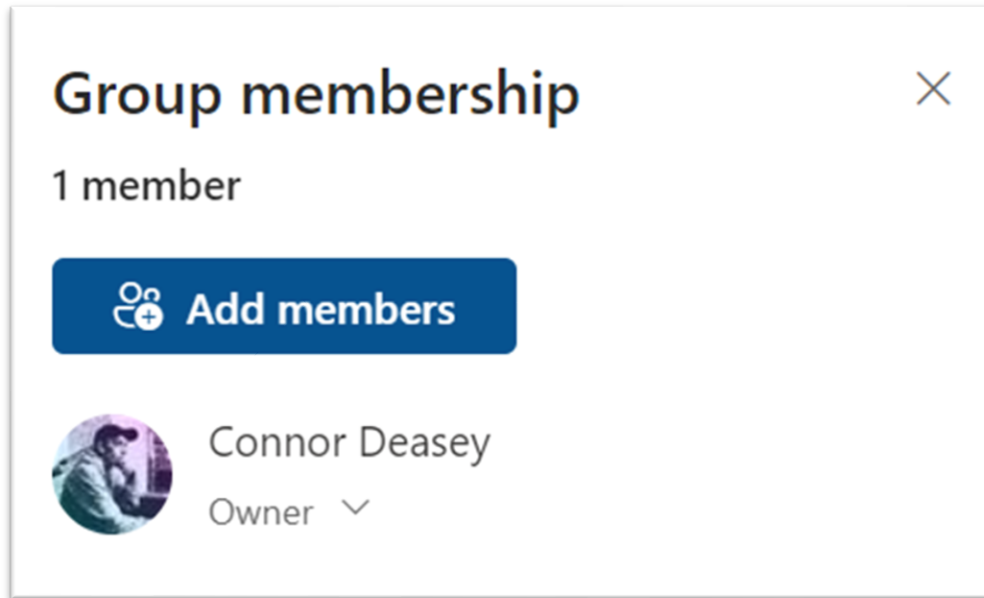
- Your search results are **entirely unique**. On the SharePoint start page, your search is tailored around your permissions
- You are searching all the SharePoint sites, hub sites, subsites that you have access to
- Your OneDrive is searched too
- You can filter items by file type and data range

## How to share content in SharePoint

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 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) add members to an entire SharePoint site by selecting the member counter in the top right of the page then search for your members or groups.



In addition to sharing the entire site, you can share individual items on a site via a link.

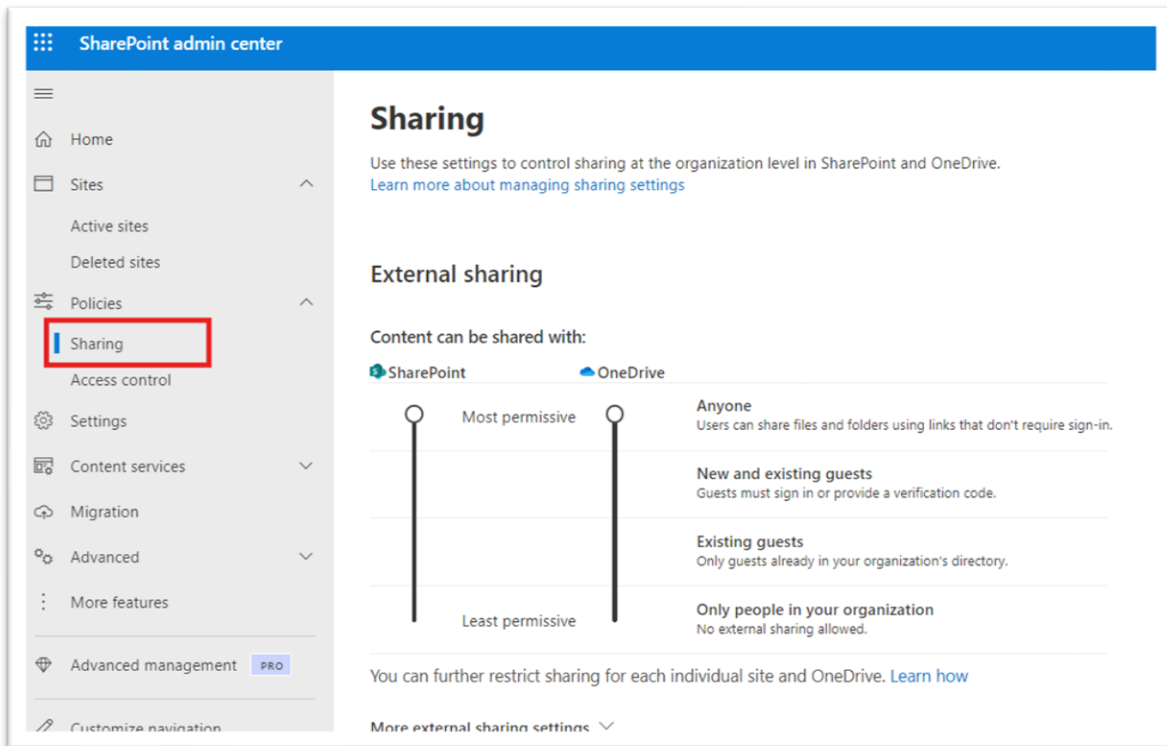
- When you share a site, you share everything on the site while adding that person to a SharePoint group
- When you share a link, you are just sharing the contents of that link which could be a file or a folder that contains files
- Also, you can share a blank folder that does not contain any files at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

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:
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 <a href="#">Secure external sharing in SharePoint</a></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>
Existing guests	Allow sharing only with guests who are already in your directory. These guests may exist in your directory because
Only people in your organization	Turn off external sharing.

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 this setting, you can restrict the Anyone links so that they
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**External sharing**

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
EBOOK-HQ	<p>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 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 or external sharing of the SharePoint site.</p>

<p>EBOOK-HR</p>	<p>This is just for members of the EBOOK-HR Office 365 group.</p> <p>For example, let's imagine that EBOOK 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 EBOOK-HR. Each department will be siloed.</p> <p>There is external sharing of files/folders or external sharing of the SharePoint site.</p>
<p>EBOOK-HR-Contracts</p>	<p>This is for a subset of the EBOOK-HR Office 365 group, as it contains information about staff contracts which is private.</p> <p>There is external sharing of files/folders or external sharing of the SharePoint site.</p>
<p>EBOOK-Subcontractors</p>	<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 or external sharing of the SharePoint site.</p>

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 EBOOK-HQ.

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

The screenshot shows the 'Active sites' management page on the left and the 'Sharing' settings for the selected site on the right.

**Active sites**  
Use this page to sort and filter sites and change site settings.  
[Learn more about managing sites](#)

Navigation: + Create, Edit, Membership, Hub, Sharing, Delete

Site name ↑	URL ↓
<input checked="" type="checkbox"/> EBOOK-HQ	.../sites/EBOOK-HQ
<input type="checkbox"/> EBOOK-HR	.../sites/EBOOK-HR

**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.

But what do the other options mean? The other options are detailed on the next page.

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.
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 <a href="#">manually added</a> . (You can tell an external user because they have <b>#EXT#</b> 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.)

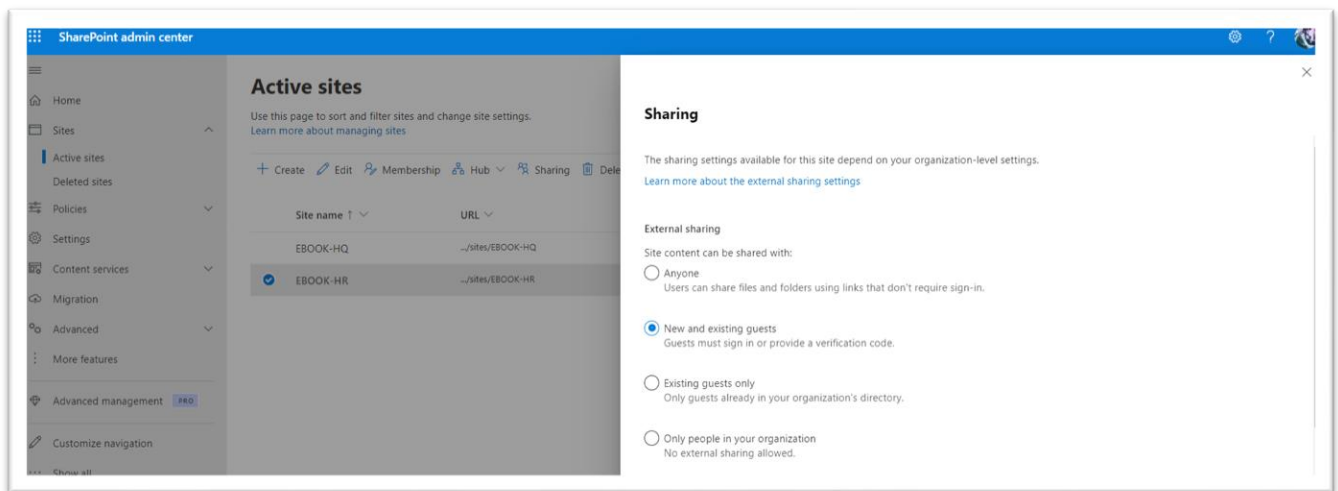
Also, in the SharePoint admin center, you can control the default sharing link and the default link permission, which is View or Edit.

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 EBOOK-HR, we want people to be able to externally share, and so we're selecting the New and existing guest's option.



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.

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

### Sharing

Use these settings to control sharing at the organization level in SharePoint and OneDrive.  
[Learn more about managing sharing settings](#)

#### File and folder links

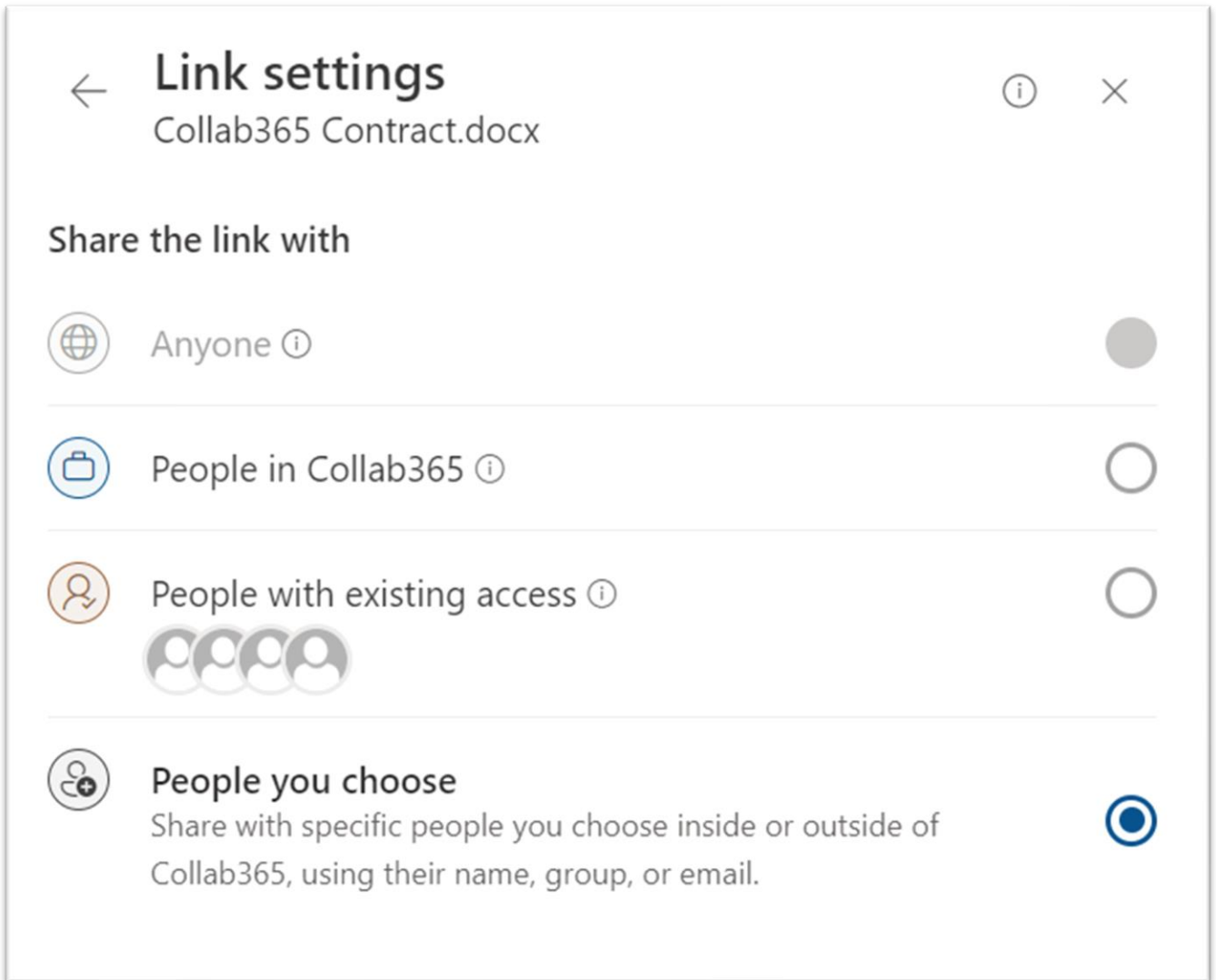
Choose the type of link that's selected by default when users share files and folders in SharePoint and OneDrive.

Specific people (only the people the user specifies)

Only people in your organization

Anyone with the link

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



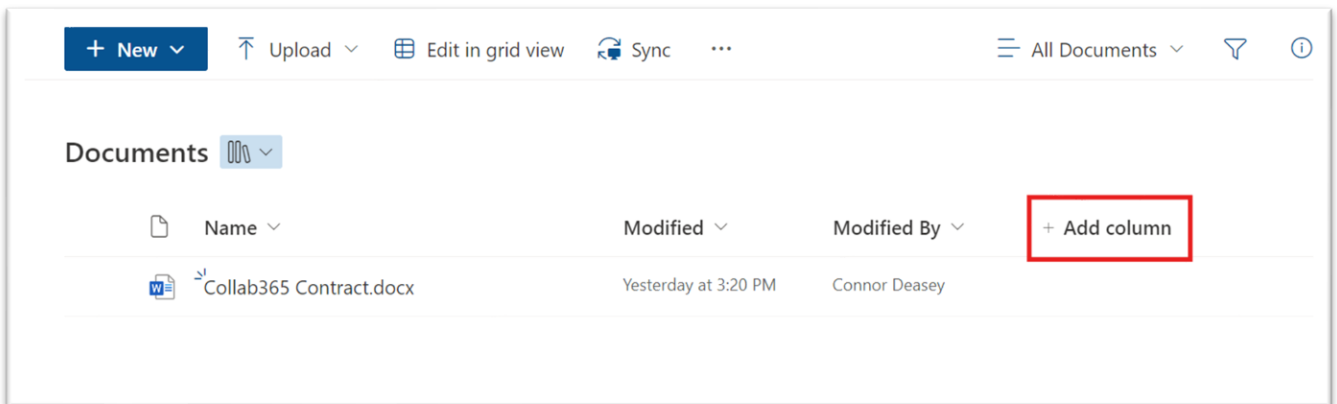
Also, because we have allowed external sharing on the EBOOK-HR site, the EBOOK-Contracts site also has external sharing switched on too.

## An Introduction to SharePoint 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.

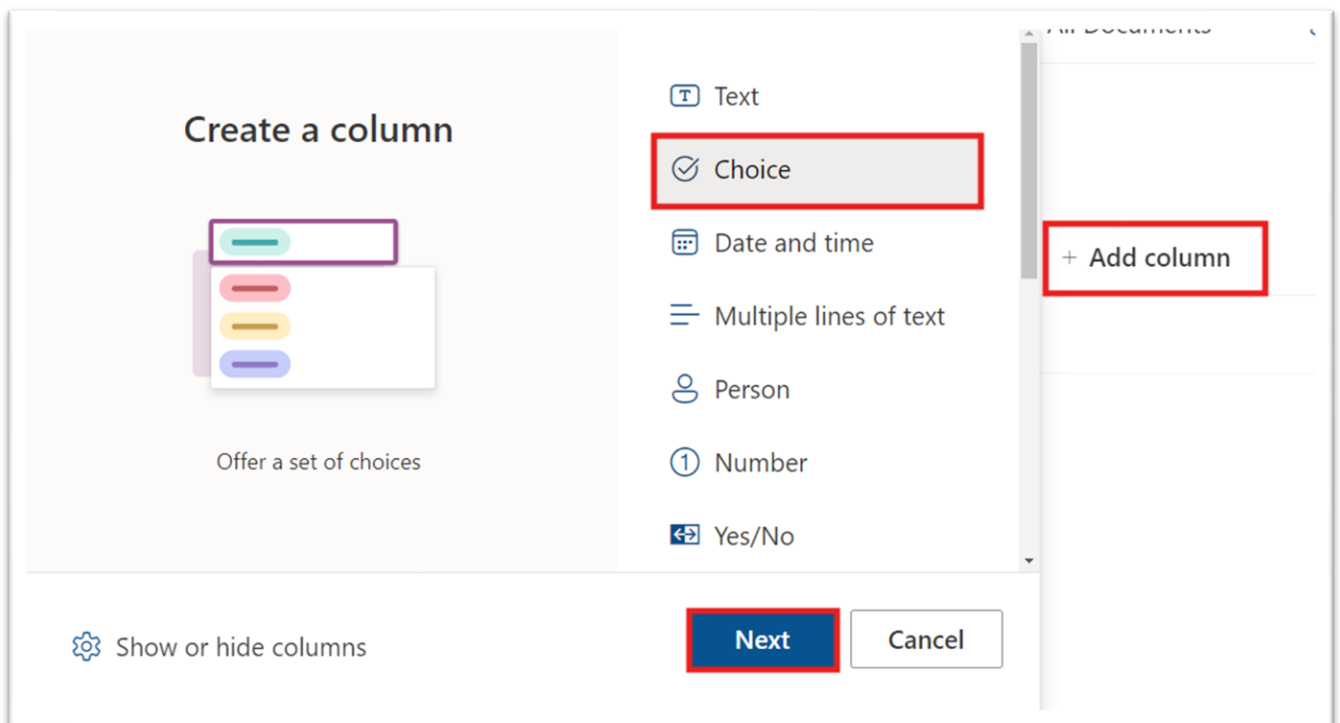
### Adding columns



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.

Select +Add column → Choice then select Next.



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

### Create a column ✕

[Learn more about column creation.](#)

**Name \***

**Description**

**Type**

**Choices \***

- 🗑️ ✕
- 🗑️ ✕
- 🗑️ ✕

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

### Create a column ✕

[Learn more about column creation.](#)

**Name \***

**Description**

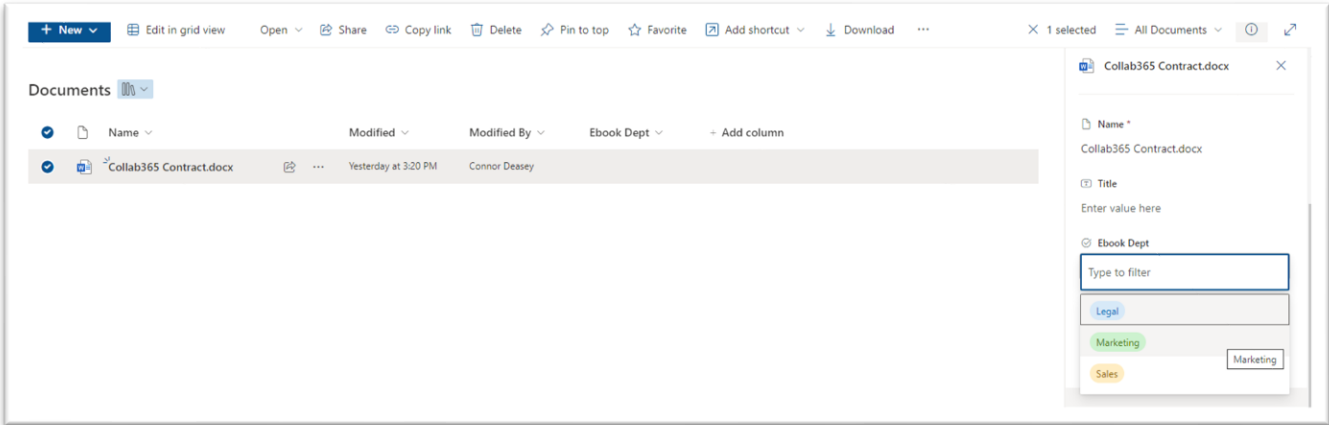
**Type**

**Choices \***

- 🗑️ ✕
- 🗑️ ✕
- 🗑️ ✕

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.

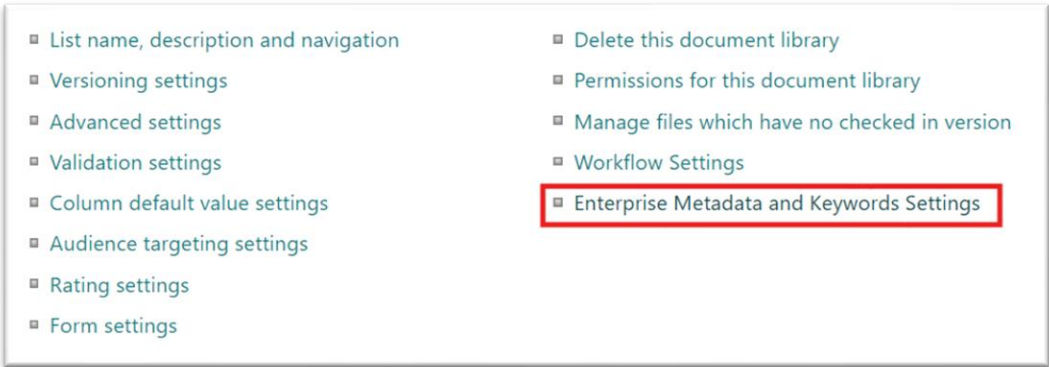
To add the metadata, select the file and choose the Details pane. Scroll down, and you will see the options pertaining to our new columns.



### 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.’

While in the library, select Settings → Library settings then More Library Settings. Then, select Enterprise Metadata and Keywords Settings.



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

Enterprise Keywords

Add an Enterprise Keywords column to this list and enable Keyword synchronization

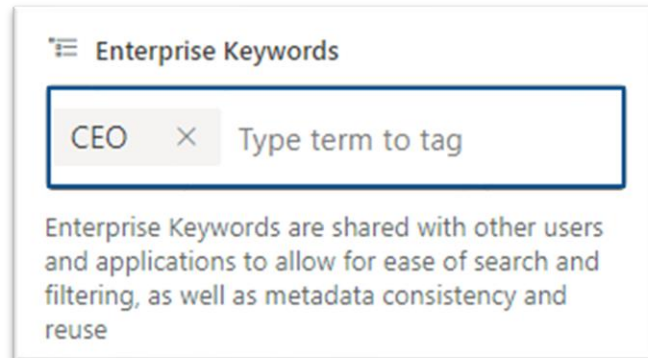
This sounds like a mouthful, but it's very straight forward! Once we have enabled it, we just then bring in the column where this metadata will be visible. On our document library, select All Documents and Edit current view then scroll down to find Enterprise keywords and then select OK.

Display	Column Name	Position from
<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"/>	Ebook Dept	5
<input type="checkbox"/>	App Created By	6
<input type="checkbox"/>	App Modified By	7
<input type="checkbox"/>	Check In Comment	8
<input type="checkbox"/>	Checked Out To	9
<input type="checkbox"/>	Color Tag	10
<input type="checkbox"/>	Comment count	11
<input type="checkbox"/>	Compliance Asset Id	12
<input type="checkbox"/>	Content Type	13
<input type="checkbox"/>	Copy Source	14
<input type="checkbox"/>	Created	15
<input type="checkbox"/>	Created By	16
<input type="checkbox"/>	Description	17
<input type="checkbox"/>	Edit (link to edit item)	18
<input checked="" type="checkbox"/>	Enterprise Keywords	19
<input type="checkbox"/>	File Size	20

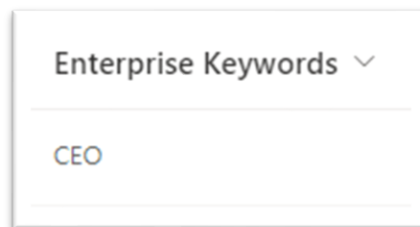
Now we have our Enterprise keyword column in place.

Name	Modified	Modified By	Ebook Dept	Enterprise Keywords	+ Add column
Collab365 Contract.docx	Yesterday at 3:20 PM	Connor Deasey			

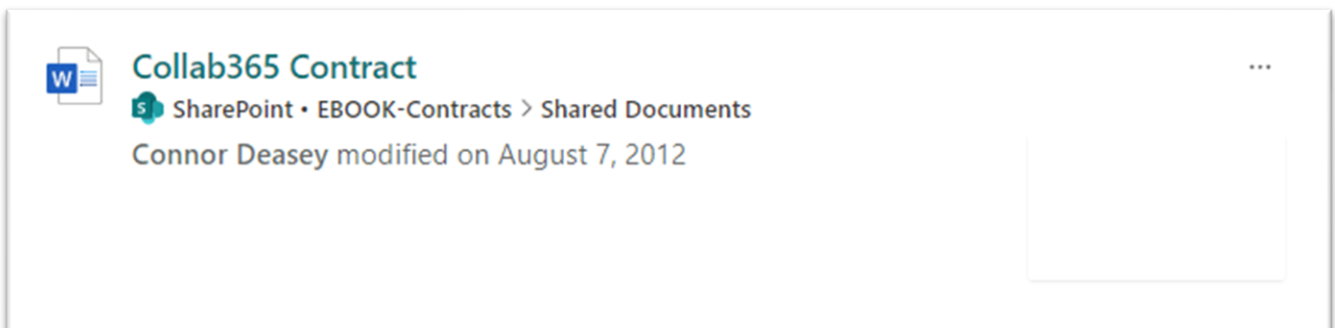
Select the file that we want to associate a keyword with and go to the details pane (same process as above). Once there, we're going to create a new keyword called CEO by typing in 'CEO;'. You must add a semi-colon after the word in order to create the keyword.



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



Back on the SharePoint Dashboard, if we search for CEO, up comes the document.



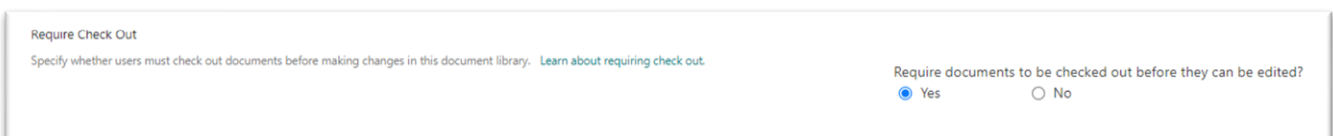
Please note the following helpful advice from Microsoft, ‘The keywords you add are available to others when users access SharePoint lists or libraries. For example, when users type similar characters in the Enterprise Keywords column of the list, SharePoint displays the keyword in a suggestion message. 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-enterprisekeywords-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. Go to the Library settings for the document library and select Versioning Settings.



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

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

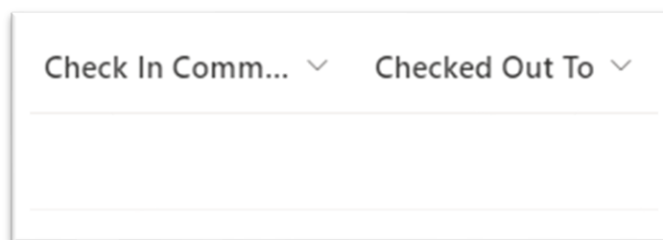
At the bottom of the page, select Yes under ‘Require documents to be checked out before they can be edited?’

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/enus/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.



Back in the library, these columns now appear.



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

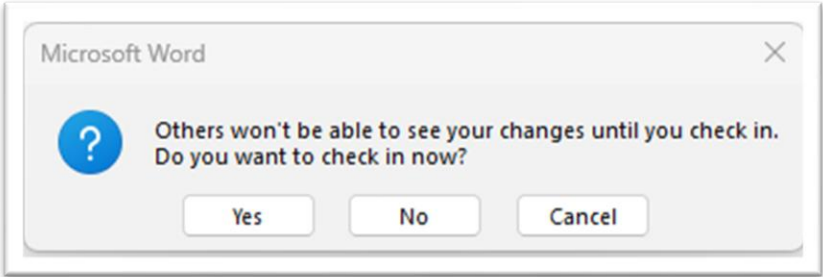


In Word, a banner appears, and while we can read the document, we must check it out in order to change its content.

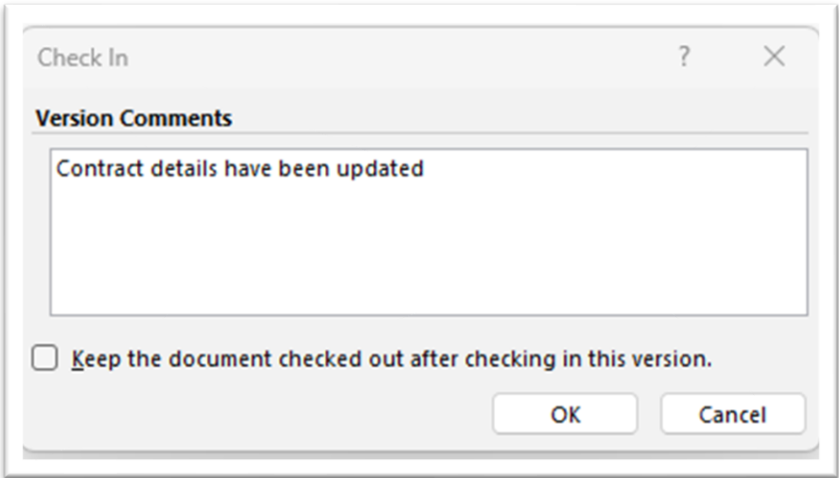
While we check out the document and add our content, meanwhile, back in the document library, one column tells our colleagues that the document is checked out to a specific person. This means that other people cannot see the changes that we are

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

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



You are prompted to add a check in comment.



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

Name	Modified	Modified By	Ebook Dept	Enterprise Keywords	Check In Comment
Collab365 Contract.docx	A few seconds ago	Connor Deasey		CEO	Contract details have been updated

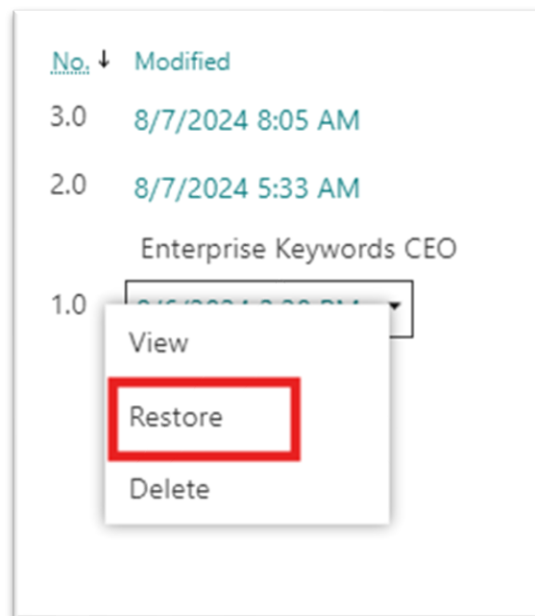
Furthermore, if Version history is selected, you can see how many versions of the document have been created, and who has created each version.

**Version history**

Delete All Versions

No. ↓	Modified	Modified By	Size	Comments
3.0	8/7/2024 8:05 AM	<input type="checkbox"/> Connor Deasey	22 KB	Contract details have been updated
2.0	8/7/2024 5:33 AM	<input type="checkbox"/> Connor Deasey	23.5 KB	Enterprise Keywords CEO
1.0	8/6/2024 3:20 PM	<input type="checkbox"/> Connor Deasey	22.5 KB	

If I wanted to revert to a previous version, I select it and pick Restore. The restored version will be copied and become the next numerical version? Because versioning never deletes a version, it always creates another one!



For more information on versioning, click here <https://docs.microsoft.com/en-us/microsoft365/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>

## An Introduction to SharePoint Lists

A list is another building block in SharePoint with a familiar interface to Document Libraries.

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.

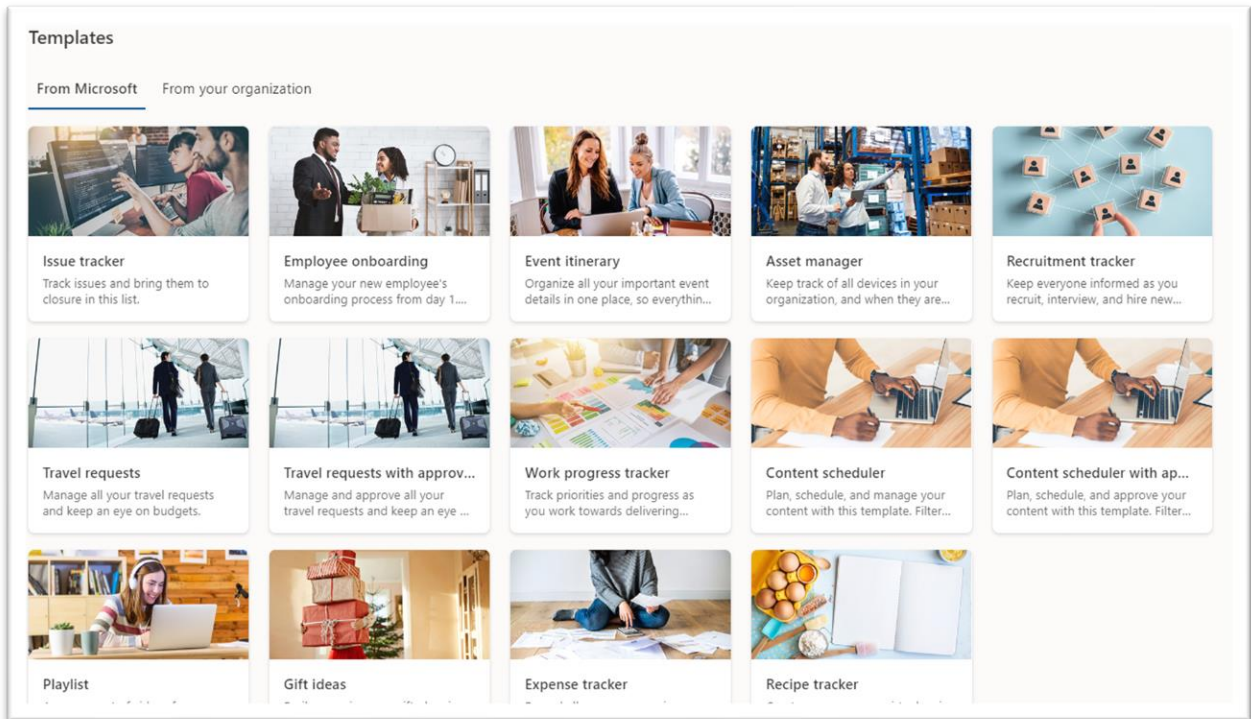
There are many out-of-the-box lists such as Links, Announcements, Contacts, and Calendar; however, creating your own Custom list gives you the most options.

### **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.

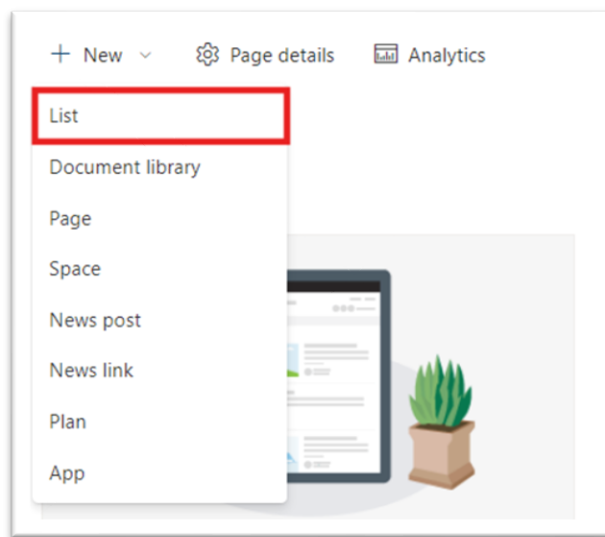
For more about lists, see here <https://support.microsoft.com/en-us/office/introduction-to-lists-0a1c3ace-def0-44af-b225-cfa8d92c52d7>

Below illustrates some of the predefined list templates that you can use and build on top of that might work for you.

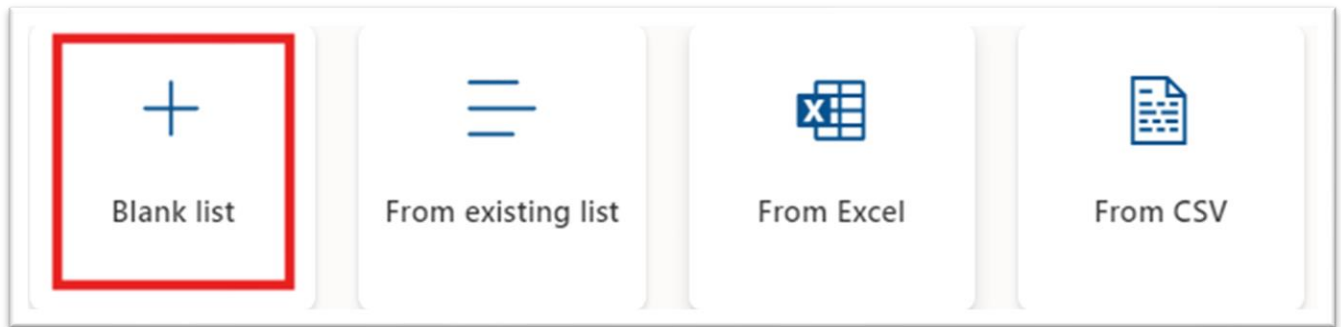


## Custom List

Although you can use the other lists as a starting point or indeed for a specific purpose, a blank list is a great option for building out a list from scratch. To create a new list, go to the SharePoint site where you'd like to add your list, select New, then list.



I'll call my list Subcontractors and create my list from blank.



Name \*

**Subcontractors**

---

Description

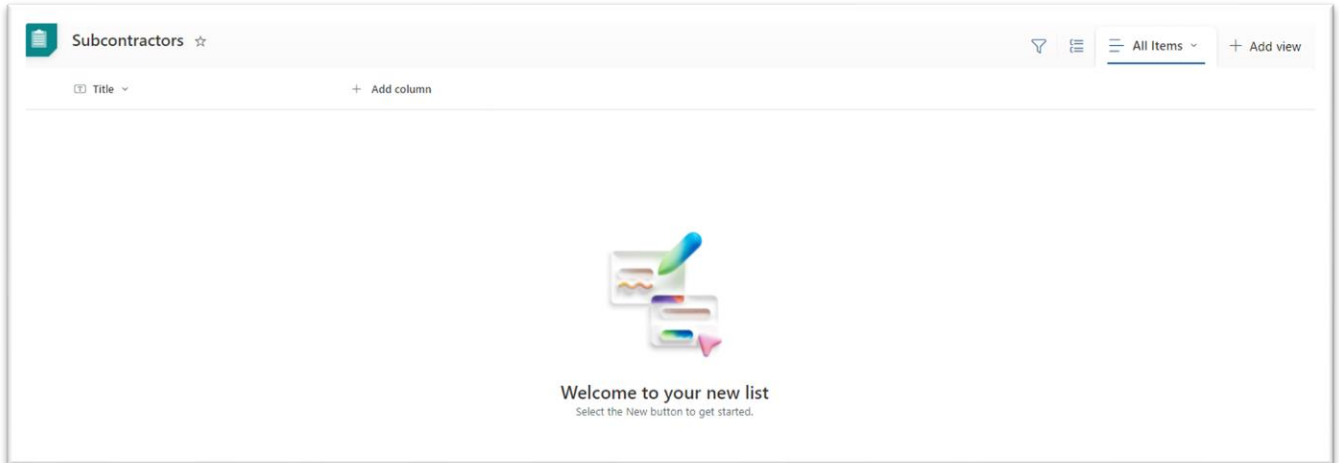
a detailed list of subcontractors

---

Show in site navigation

< Back **Create** Cancel

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.



We can now add columns just like a SharePoint Library, the table on the next page highlights the column names and types that we have chosen for our example.

Column name	Column type
First name	Text
Last name	Text
Area covers	Choice: Dublin, Dundee, Manchester
Skill	Choice: Installer, Trainer, Support
Hourly rate	Currency

And here is our finished list with some data inserted.

First Name	Last Name	Area Choi...	Skill	Hourly Ra...
Helen	Jones	Manchester	Support	\$75.00
Mark	Jones	Dublin	Installer	\$125.00
Fraser	Beadle	Dundee	Installer	\$125.00
Jon	Manderville	Dublin	Support	\$60.00
Connor	Deasey	Manchester	Trainer	\$75.00

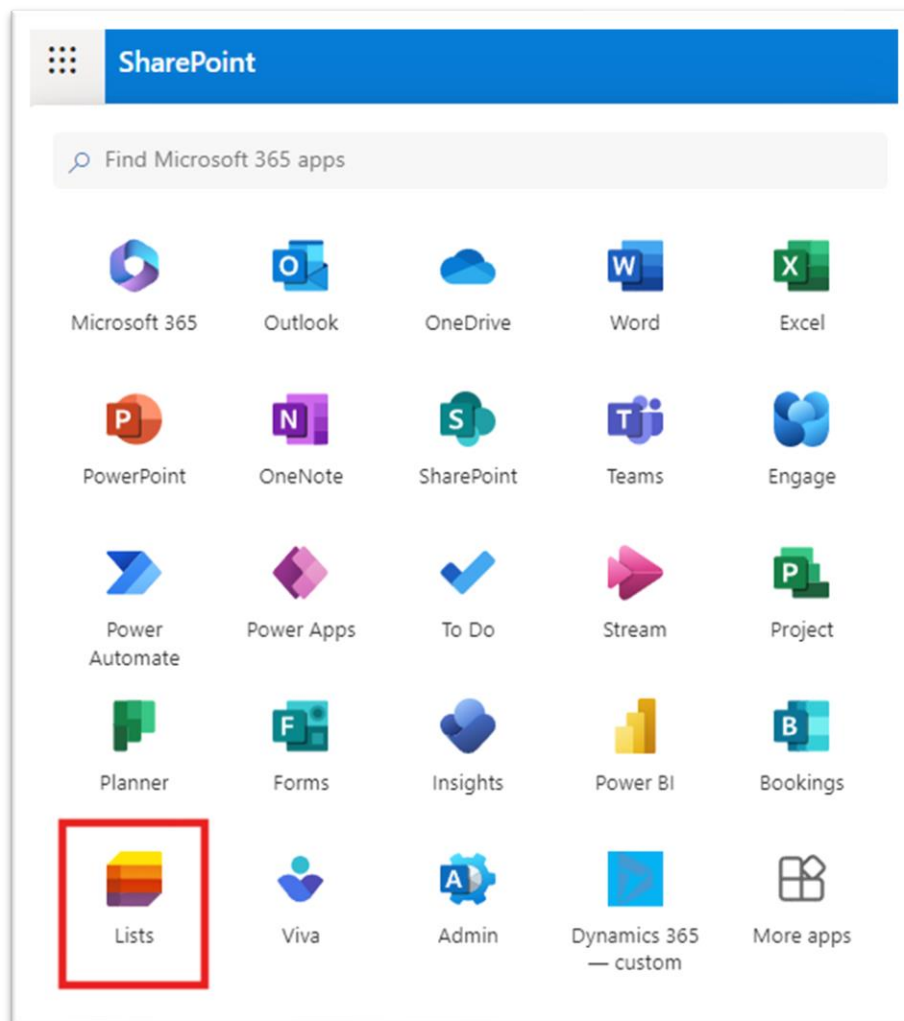
With our list we can:

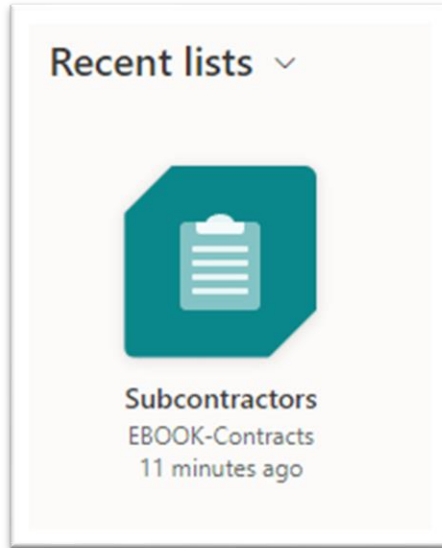
- Search structured data in Areas covers
- Filter first and last names
- Filter hourly rates
- Utilize the Power Platform to interact with our Data

## What Is Microsoft lists?

Microsoft lists are a new product and are essentially SharePoint lists, but you can use them without 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:

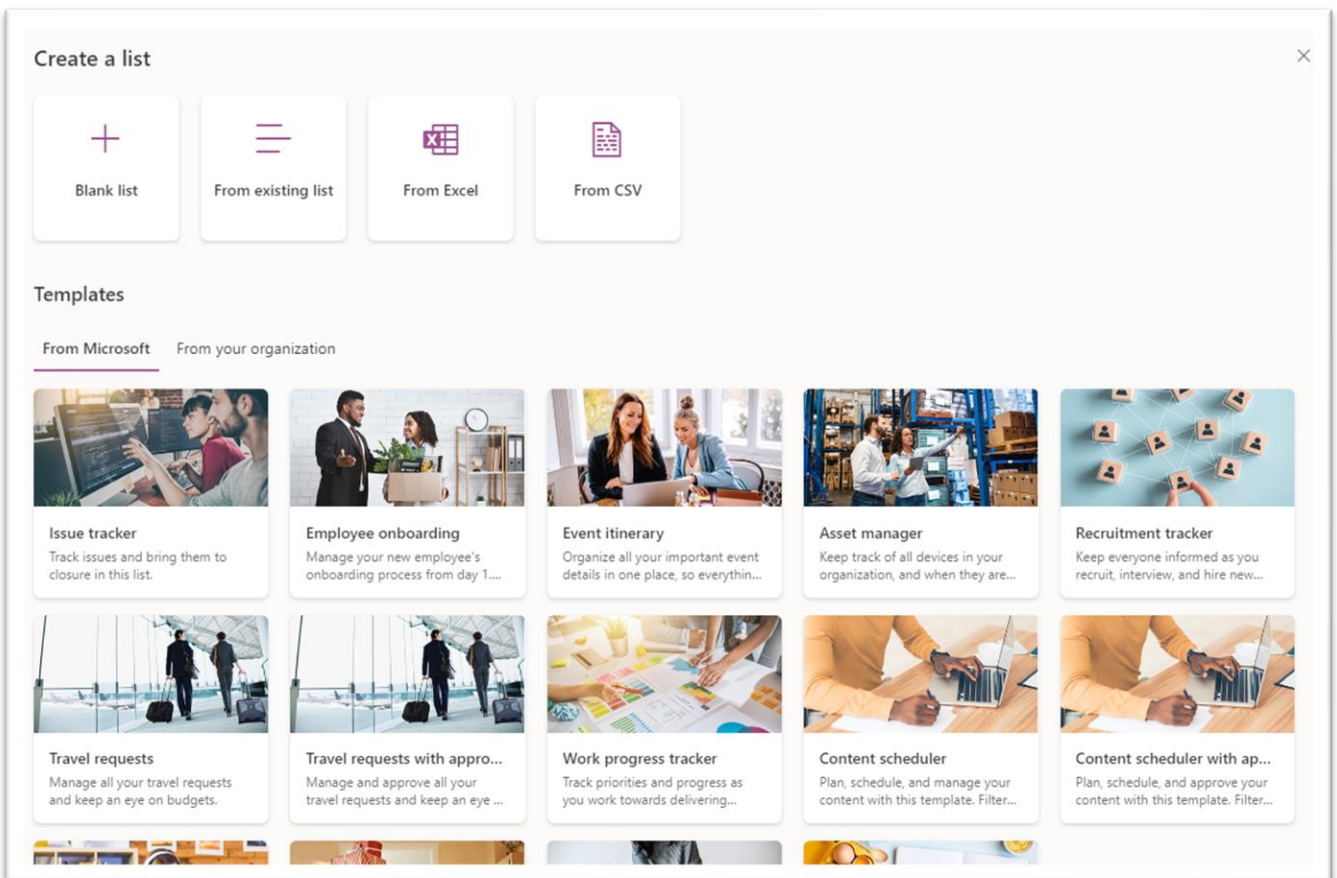
The screenshot shows the Microsoft Lists interface for a list named "Subcontractors" under the "EBOOK-Contracts" site. The interface includes a top navigation bar with options like "Add new item", "Exit grid view", "Undo", "Share", "Export", "Forms", "Automate", and "Integrate". Below the navigation bar, the list title "Subcontractors" is displayed with a star icon. The main content area shows a table with columns for Title, First Name, Last Name, Area Choice, Skill, and Hourly Rate. The table contains five rows of data, with the last row highlighted by a red box around the Hourly Rate cell.

Title	First Name	Last Name	Area Choice	Skill	Hourly Rate
	Connor	Deasey	Manchester	Trainer	\$75.00
	Jon	Manderville	Dublin	Support	\$60.00
	Fraser	Beadle	Dundee	Installer	\$125.00
	Mark	Jones	Dublin	Installer	\$125.00
	Helen	Jones	Manchester	Support	\$75.00

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 by selecting + New list and choose a template, just like we could in SharePoint.



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

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

What is your list about?

Choose a color

Choose an icon

Save to \*

My lists

< Back Create Cancel

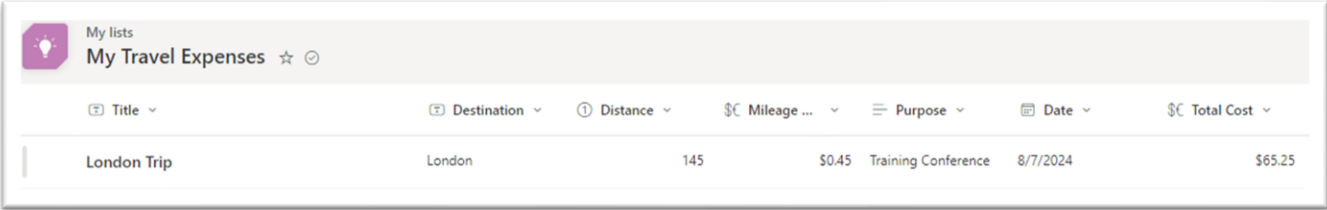
Next, we're going to add the following columns.

Column name	Column type
Title	In this example, we're going to keep the Title column as the title of the travel
Destination	Text
Distance	Number
Milage rate	Currency
Purpose	Multiple lines of text
Date	Date and time
Total cost	Number (Use calculated value)

All of the column 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]**.

The screenshot shows the 'Settings > Edit Column' interface. The 'Name and Type' section has 'Column name:' set to 'Total Cost'. Below it, a red box highlights the text: 'The type of information in this column is: Calculated (calculation based on other columns)'. The 'Additional Column Settings' section includes a 'Description:' field, a 'Formula:' field containing '=Distance\*[Mileage Rate]' (highlighted with a red box), and an 'Insert Column:' dropdown menu with options: Color Tag, Compliance Asset Id, Created, Date, Destination, Distance, Mileage Rate, Modified, and Title. Below the dropdown is an 'Add to formula' link. The 'The data type returned from this formula is:' section has radio buttons for: Single line of text, Number (1, 1.0, 100), Currency (\$, ¥, €) (selected and highlighted with a red box), Date and Time, and Yes/No. The 'Number of decimal places:' is set to 'Automatic' and the 'Currency format:' is set to '\$123,456.00 (United States)'.

Next, add an item to your list. Once the list is saved, the item is added as a row, and the calculated column multiplies Destination and Mileage rate.



Title	Destination	Distance	Mileage ...	Purpose	Date	Total Cost
London Trip	London	145	\$0.45	Training Conference	8/7/2024	\$65.25

## What's Next?

This eBook introduces you to the world of SharePoint and Microsoft Lists, and there are tonnes of tools and options that you can utilize to stay organized, build a productive team and enhance your business going forward. Don't be afraid to try out what we have discussed in this eBook for yourself.

If you are looking for further guidance, you can visit the Collab365 Academy where we have many hands-on SharePoint courses, workshops and other great content to take your skills to the next level.

Thanks for reading and remember to check out our other beginner's guide eBooks.