



Microsoft 365

SharePoint Essentials

Welcome to M365 SharePoint Essentials

BE PRESENT
Multi-tasking is a myth



CLOSE EMAIL
They'll be there for you later.



BE CURIOUS
Ask questions and be interested in what others have to say.



RAISE YOUR HAND
Raise your hand for real, or virtually, or post a smiley face or thumbs up.



PHONE AWAY
Move it out of reach so you won't be distracted.



TAKE NOTES
Capture important key points as you learn.



SUGGEST IT
If you have any great ideas, share them.



ENGAGE
Participate and engage with others. It may not be your thing, but it may help them to learn.



What You'll Learn Today

Overview of Microsoft SharePoint

- Topics covered include:
 - Introduction to SharePoint in Microsoft 365
 - Accessing SharePoint
 - Navigating the SharePoint Interface
 - File Management Basics
 - Collaboration Features
 - Version Control
 - Restoring Previous Versions



Lesson 1

Introduction to SharePoint in M365

- Choose the Right Location
- Core Features and Benefits



Choose the Right Location for Your Files

What, when, and where to store, share, and collaborate on files in Microsoft 365 comes down to choosing the right application according to how many people are likely to see your document.



SharePoint
Files stored on SharePoint are accessible across many departments for long-term storage



What is SharePoint?

SharePoint as a long-term, structured file storage for teams, departments, and projects. SharePoint is the backbone for file storage in Microsoft Teams and other apps.

Document Storage and Management

- SharePoint provides a centralized platform for storing, organizing, and managing documents.

Collaboration

- It allows multiple users to work on documents simultaneously, share files, and manage content efficiently.

Integration with Microsoft 365

- SharePoint integrates seamlessly with Microsoft 365, making it easy to create, edit, and share documents directly from Office applications.

Access and Navigation

- Users can access SharePoint through navigation, shared links, or search, ensuring that documents and information is easily retrievable.



Understanding Document Libraries

Common use cases: Team sites, document libraries, project management

SharePoint Site can include:

- Pages
- Document libraries
- Lists
- Web parts (like calendars, announcements, etc.)

Document Libraries

- Where files are stored supporting versioning, check-in/check-out, and metadata.
- Can have custom views and filters.
- Multiple libraries can exist in one site (e.g., “Contracts,” “Marketing Materials”).

Folders

- Used within document libraries to organize files and for grouping related documents.
- Can be nested (e.g., Projects > 2025 > Q3).
- Too many nested folders can make navigation harder and reduce the benefits of metadata.



Lesson 2

Accessing SharePoint

- How to Access SharePoint
 - Via web browser
 - Via Teams



How to Get to SharePoint Files

Accessing SharePoint via a Browser

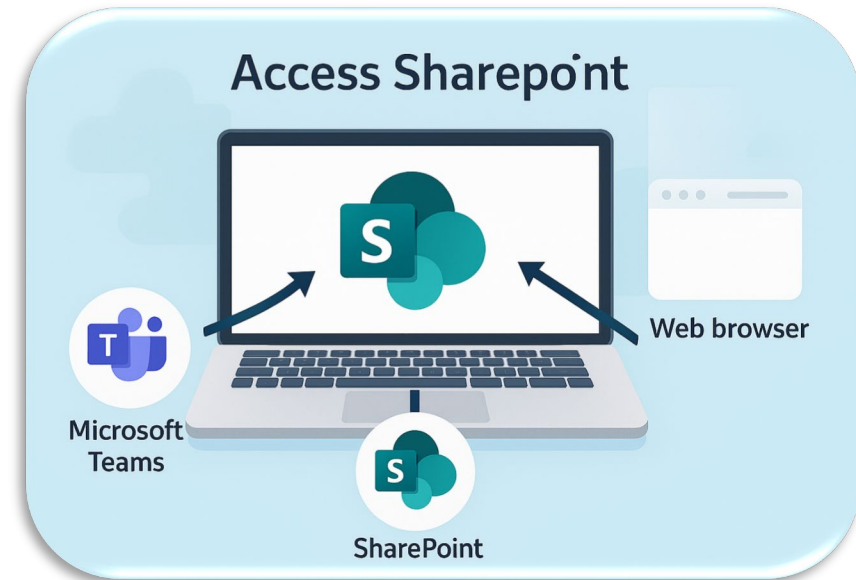
Use links from Teams or Outlook.

- Full access to the site's structure—pages, libraries, lists, and settings.
- Best for managing metadata, creating views, and customizing site content.

Accessing SharePoint via Microsoft Teams

Go to a Team → click on the Files tab.

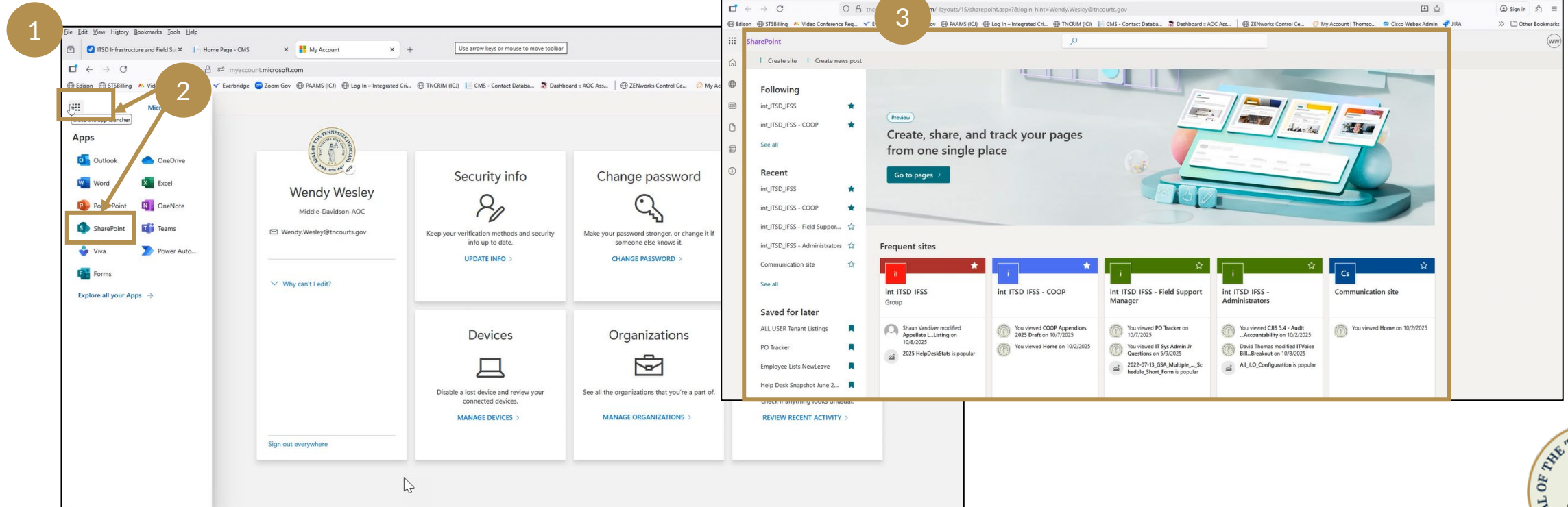
- This tab is connected to a SharePoint document library behind the scenes.
- Open files in SharePoint for advanced features like version history or metadata views.



Access SharePoint on the Web

Accessing SharePoint from a web browser provides the most comprehensive and up-to-date experience for users.

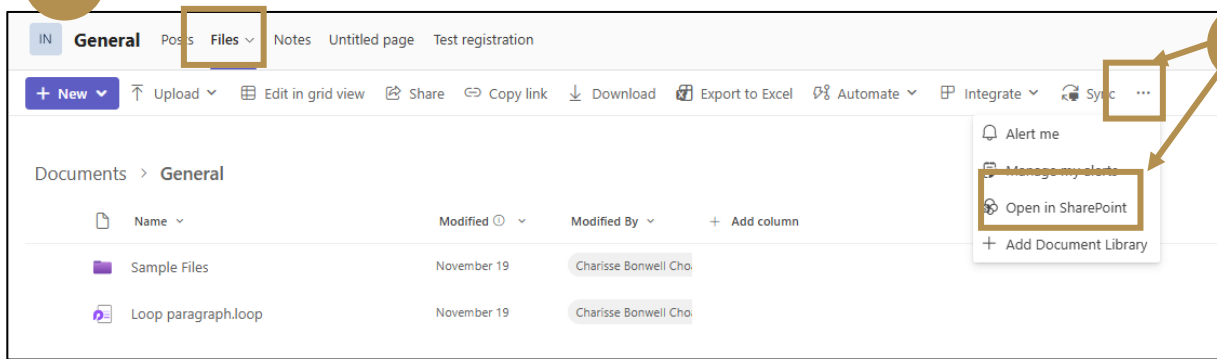
1. Type **myaccount.microsoft.com** into your internet browser, **M365** opens.
2. From the Navigation Pane select the **App Launcher (nine dots)** and then select **SharePoint**.
3. Your **SharePoint** site displays.



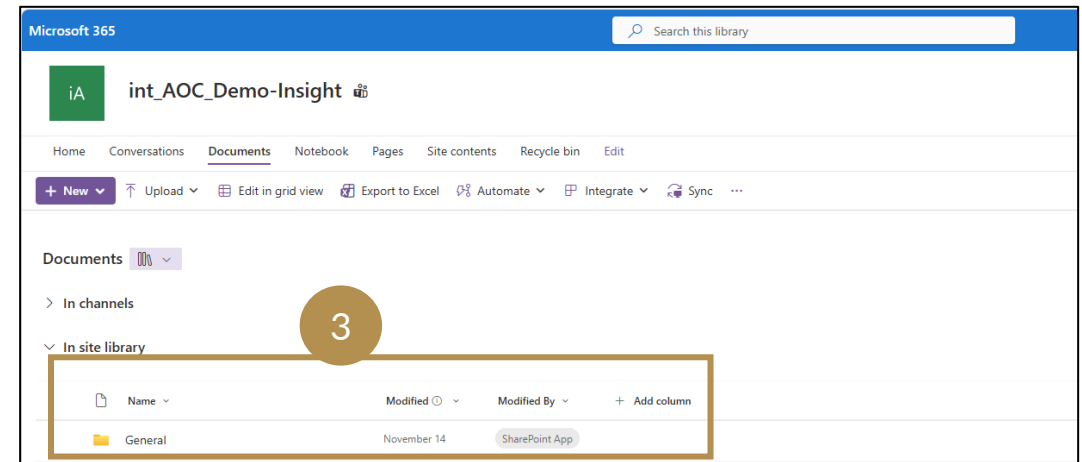
Access SharePoint from a Teams Channel

Accessing SharePoint from Microsoft Teams offers seamless integration with your team's conversations, meetings, and documents in one place.

1. To access SharePoint from Microsoft Teams, navigate to the relevant team or channel and select the **Files** tab.
2. From the ribbon, click the **More commands (ellipsis)** and select **Open in SharePoint**.



3. The channel displays in **SharePoint**.



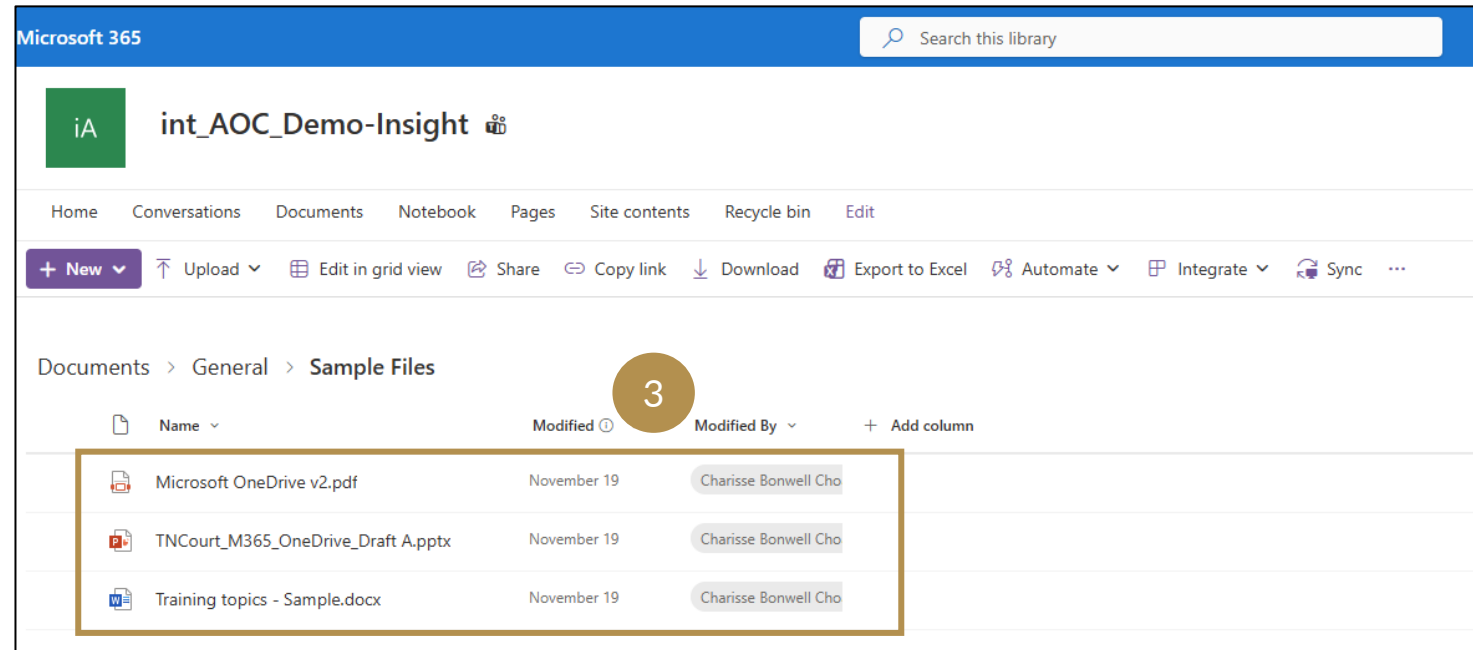
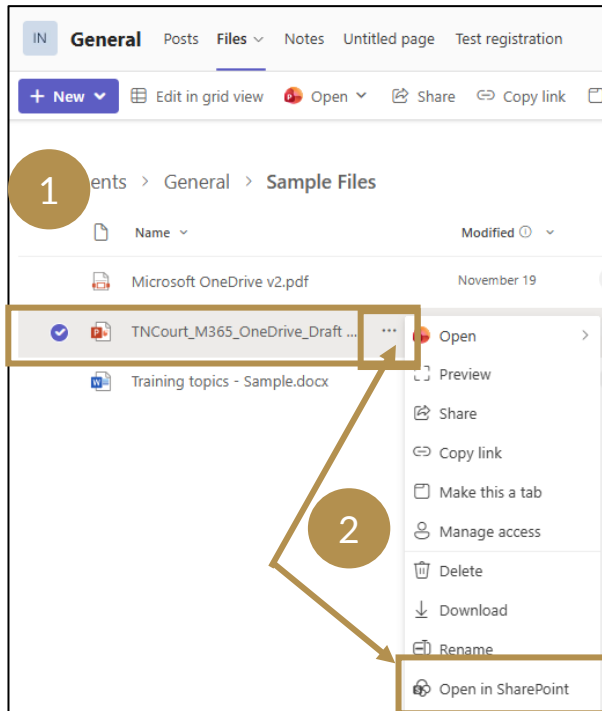
- A new browser window or tab opens taking you to the SharePoint site associated with the selected team.
- Here, you can access advanced features, organize documents, or use SharePoint lists and libraries.



Access SharePoint from a File in Teams

You can also access SharePoint from a file on Teams.

1. Navigate to the relevant team or channel and select the **Files** tab.
2. Locate the file you wish to open, then right-click on the file or click the **More options (ellipsis)** and select **Open in SharePoint** from the menu.
3. This action launches your web browser and takes you directly to the SharePoint document library where the file is stored.



Lesson 3

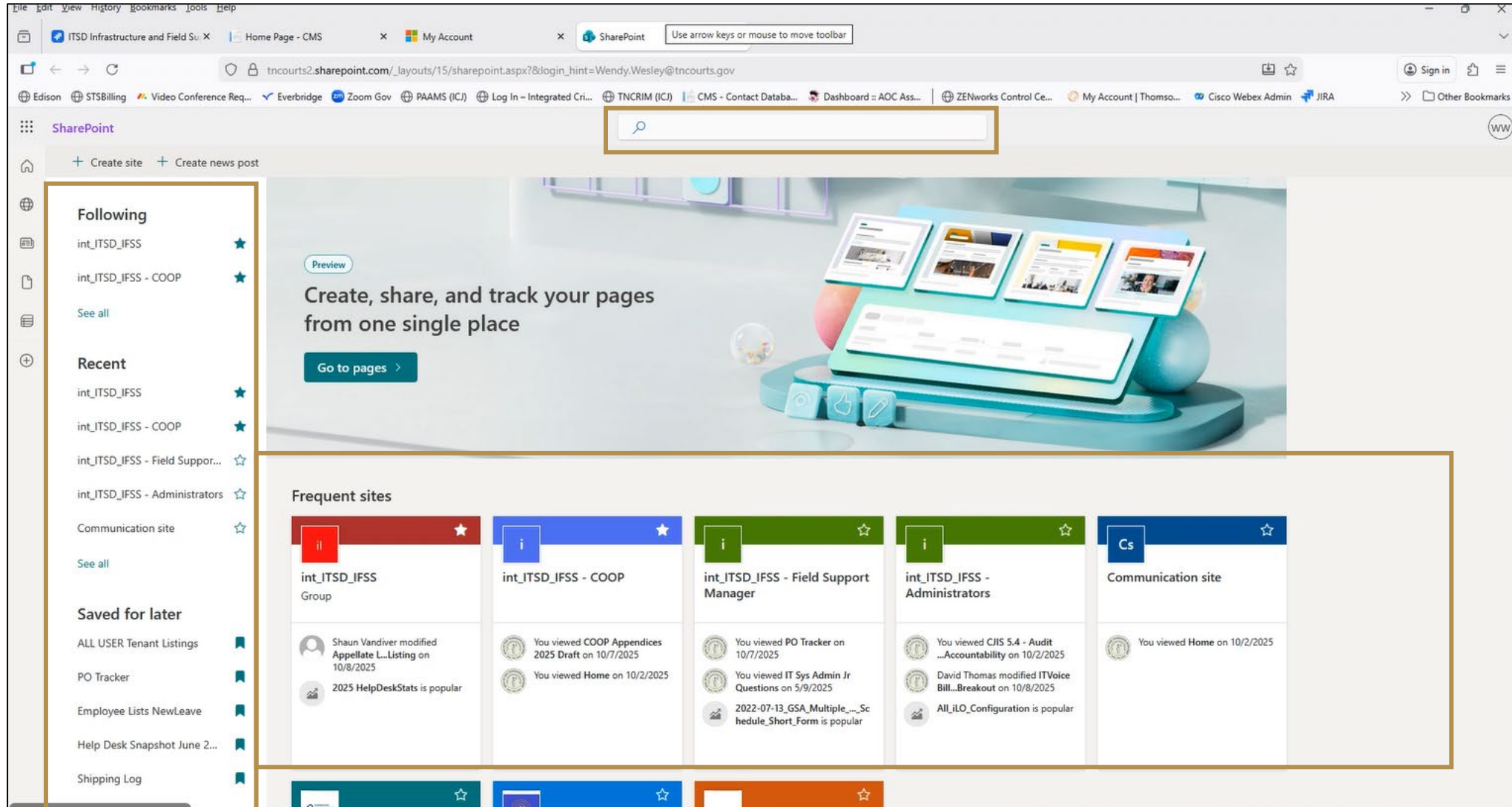
Navigating the SharePoint Interface

- Main Menus and Layout
- Site Navigation Bar
- Document Libraries vs. Lists
- Site Contents and Home Page



SharePoint Home Page Layout

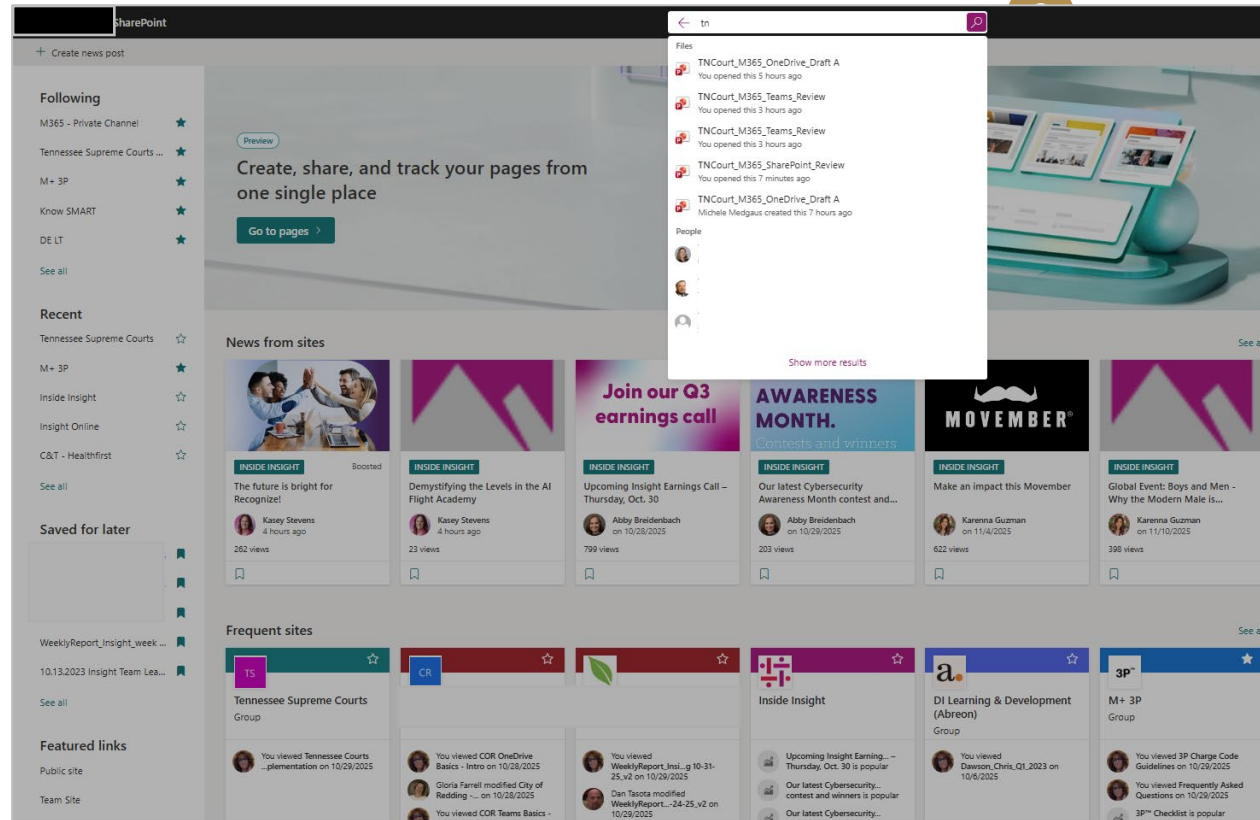
The **SharePoint** home page provides an entry point for users.



Search for a Site

Finding specific sites within SharePoint is made easy with its powerful search functionality. The **Search Bar** helps users quickly find files, folders, and sites by keywords.

1. Click on the search bar and enter keywords related to the site you are looking for (e.g., Finance, HR).



Browse through the results and click on the desired site to access it.

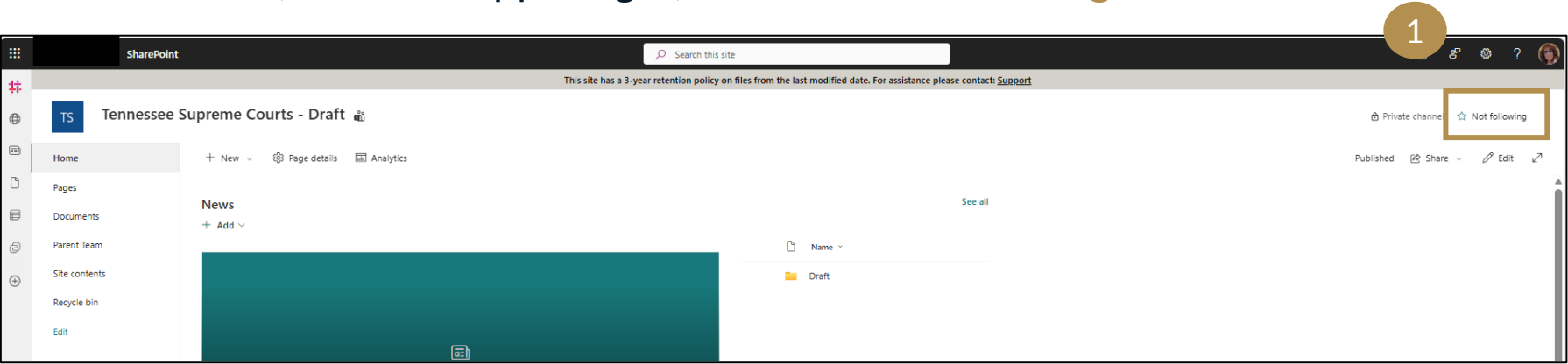
2. Press **Enter** or click the **Search** icon. SharePoint displays list of search results that match your query.



Follow a Site

Following a site on SharePoint means that you are keeping track of the site's updates and activities.

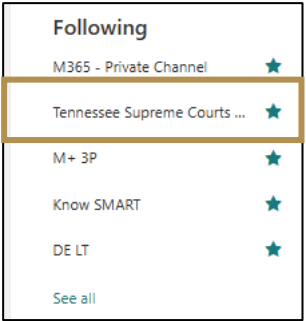
1. To follow a site, from the upper right, click on **Not Following**.



2. The status changes to **Following**.



3. When you follow a site, it appears under Following on the SharePoint homepage, allowing you quick and easy access to it from your SharePoint homepage.



Lesson 4

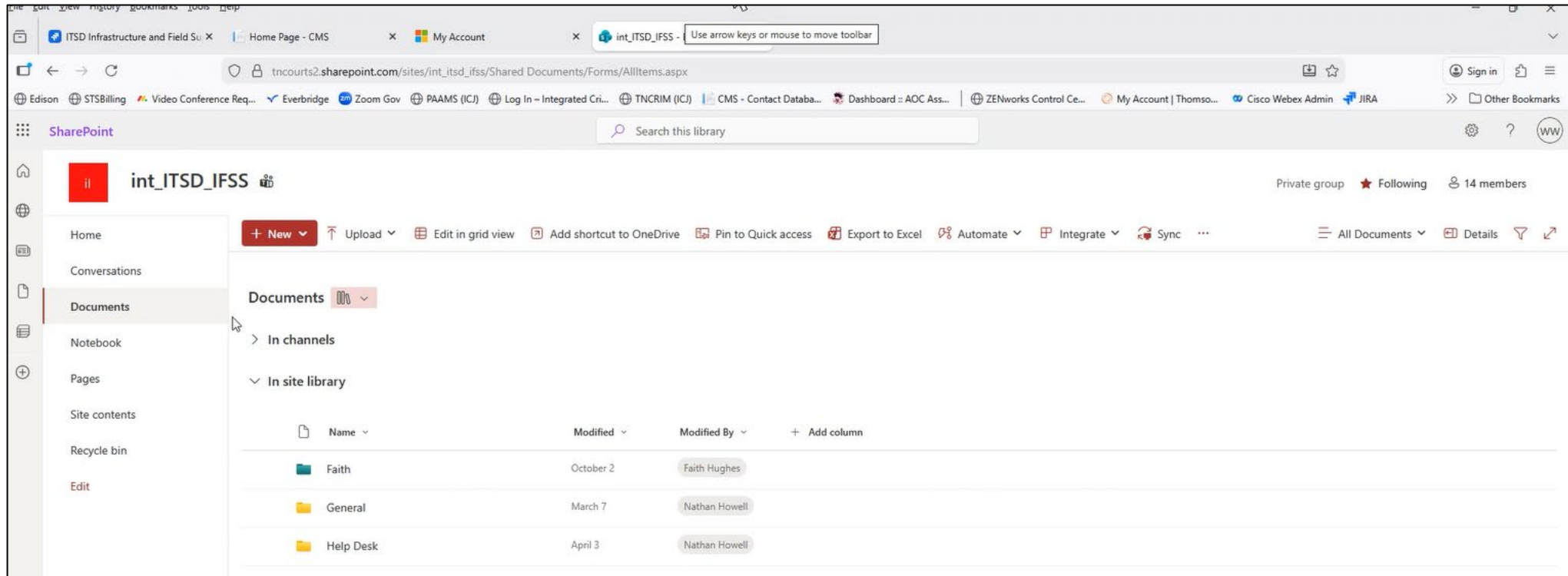
File Management Basics

- Viewing files
- Opening documents online and in desktop apps
- Previewing files without downloading



Document Management

Using **SharePoint** as a **Document Management System**, makes it easier to share, manage, change and find documentation.



SharePoint's integration with Teams and OneDrive, streamlines workflows and enhances productivity, while built-in compliance and security features help protect sensitive information and support organizational policies.



View a Folder or a File

Open the document library where the files are stored, browse through folders, or use the search function to locate specific items, and click on any folder or document to open it directly in your web browser or with the corresponding Microsoft Office app.

To view a File:

- Click on a folder.
- Click on a file.

Microsoft 365

int_AOC_Demo-Insight

Home Conversations Documents Notebook Pages Site contents Recycle bin Edit

+ New Upload Edit in grid view Share Copy link Download Export to Ex

Documents > General

Name	Modified	Modified By	+ Add column
Sample Files	November 19	Charisse Bonwell Cho	
Loop paragraph.loop	November 19	Charisse Bonwell Cho	

Documents > General > Sample Files

Name	Modified	Modified By	+ Add column
Microsoft OneDrive v2.pdf	November 19	Charisse Bonwell Cho	
TNCourt_M365_OneDrive_Draft A.pptx	November 19	Charisse Bonwell Cho	
Training topics - Sample.docx	November 19	Charisse Bonwell Cho	



Create a New Folder or File on SharePoint

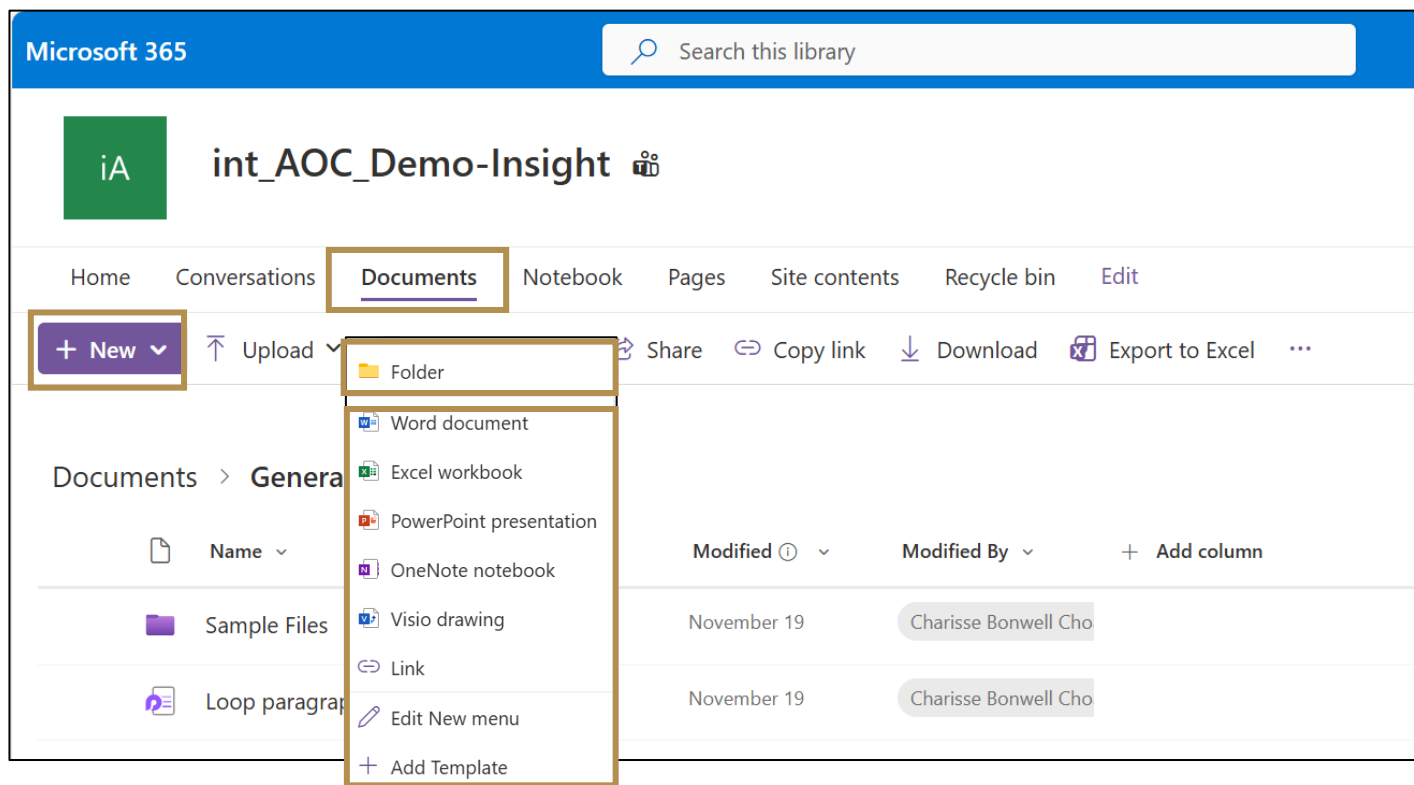
To create new files or folders directly in SharePoint, start by navigating to your desired document library within the SharePoint site.

To create a folder:

- Click the **+ New** drop-down.
- Select **New Folder**.
- Name the folder and select a color.

To create a file:

- Click the **+ New** drop-down.
- Select a **New File** type.



When you create a new file or folder in a SharePoint document library that is connected to a Microsoft Teams site, the item is automatically available within the corresponding Teams channel's Files tab



Upload a File

To upload a file or folder:

- Click the **Upload** drop-down arrow.
- Select **Files** or **Folders**.
- Select the file or folder from File Explorer.
- Click **Open**.

The screenshot illustrates the steps to upload a file to a Microsoft 365 library. The interface shows the 'Microsoft 365' header with a search bar. The library is named 'int_AOC_Demo-Insight'. The 'Documents' tab is active. The 'Upload' dropdown menu is open, showing options for 'Files', 'Folder', and 'Template'. A File Explorer window is open, showing a list of files, with 'Global Compliance.docx' selected. The 'Open' button in the File Explorer is highlighted.

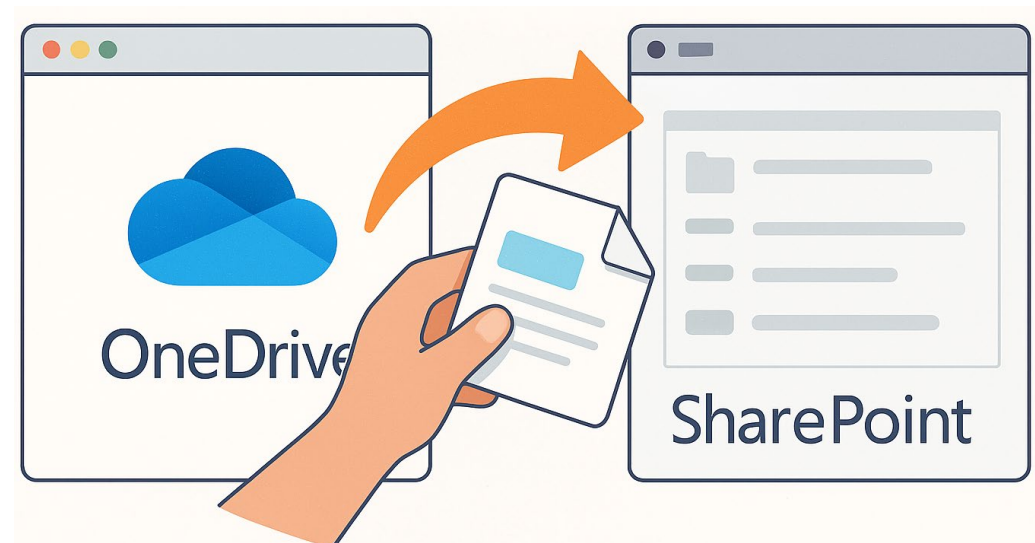
Name	Status	Date modified
Job Aid	✓	12/8/2025 10:42 AM
Copilot Chat.docx	✓	12/1/2025 9:09 AM
Global Compliance.docx	✓	12/4/2025 2:54 PM
Prompts.docx	✓	12/1/2025 9:08 AM
TNCourt_M365_Copilot Chat_Review.pptx	✓	12/3/2025 9:29 AM



Dragging and Dropping Files

Dragging and dropping files from OneDrive to SharePoint provides a quick and straightforward way to transfer documents, especially when moving multiple files or folders at once.

- Open OneDrive on your computer.
- Select the files or folders you want to upload.
- Drag them directly into the SharePoint document library window in your browser.
- The files will upload and appear in the library.
- This method works for both individual files and entire folders.

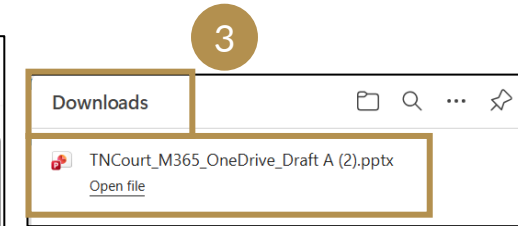
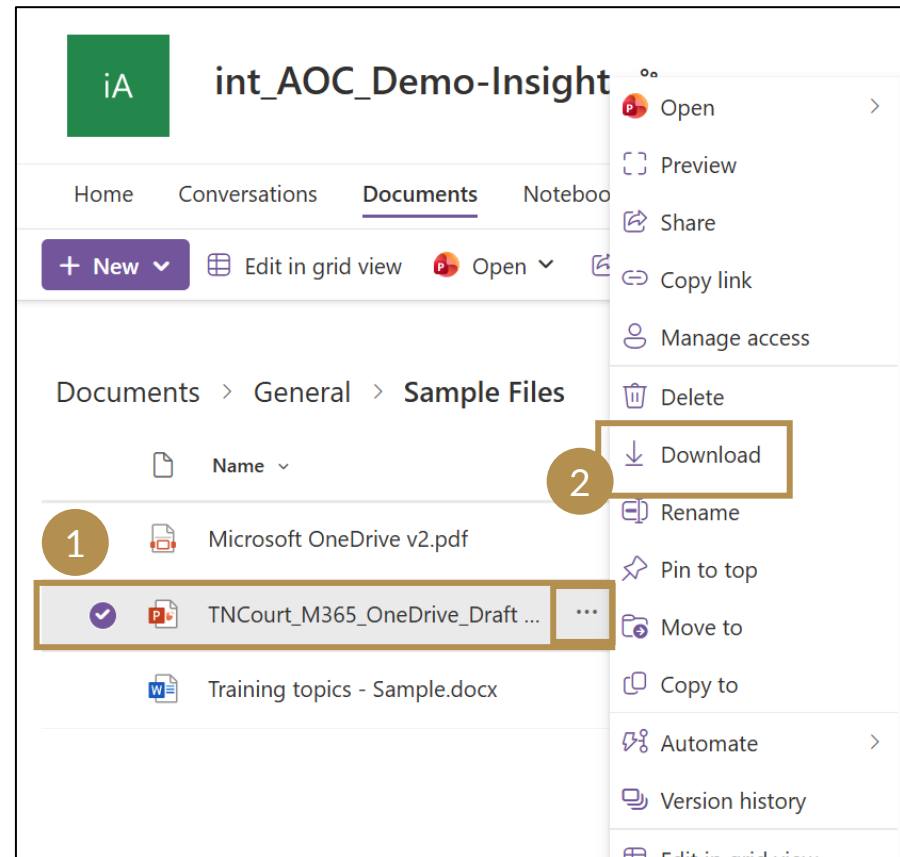


Download SharePoint Files

To download a file from SharePoint:

1. Right-click on the file or click the **Show more actions for this item (ellipsis)** icon next to the file name.
2. From the menu, click **Download**.
3. The file can be found in your **Downloads** folder.

From the Downloads folder you can move the file to any OneDrive location, and it will sync to the cloud.



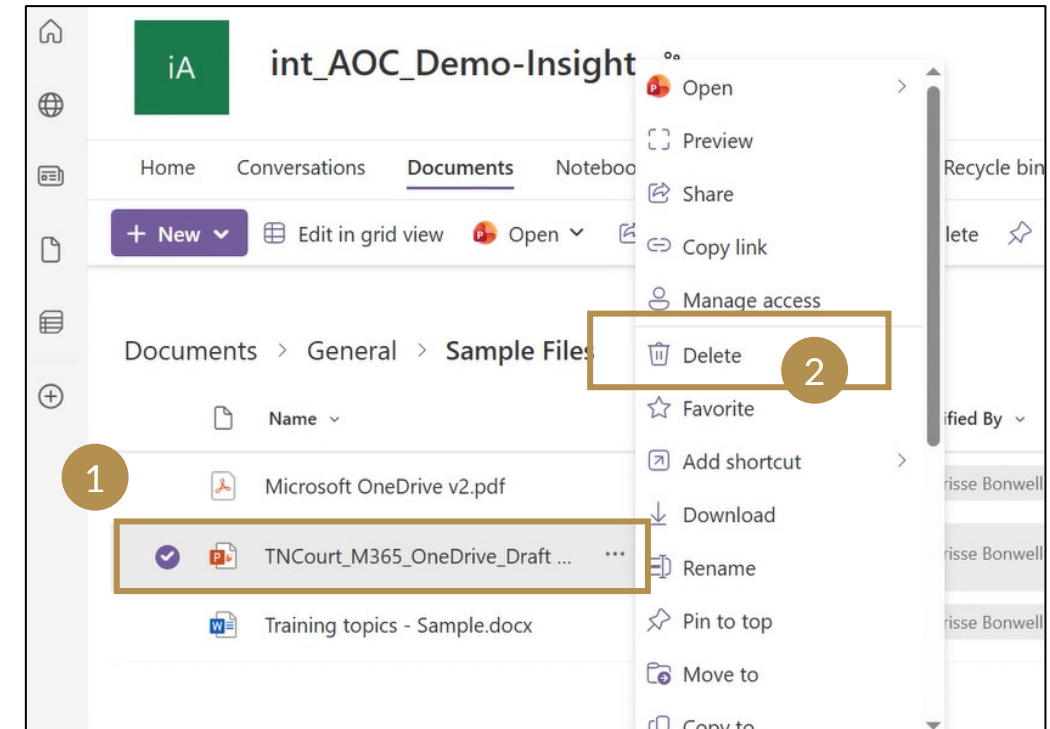
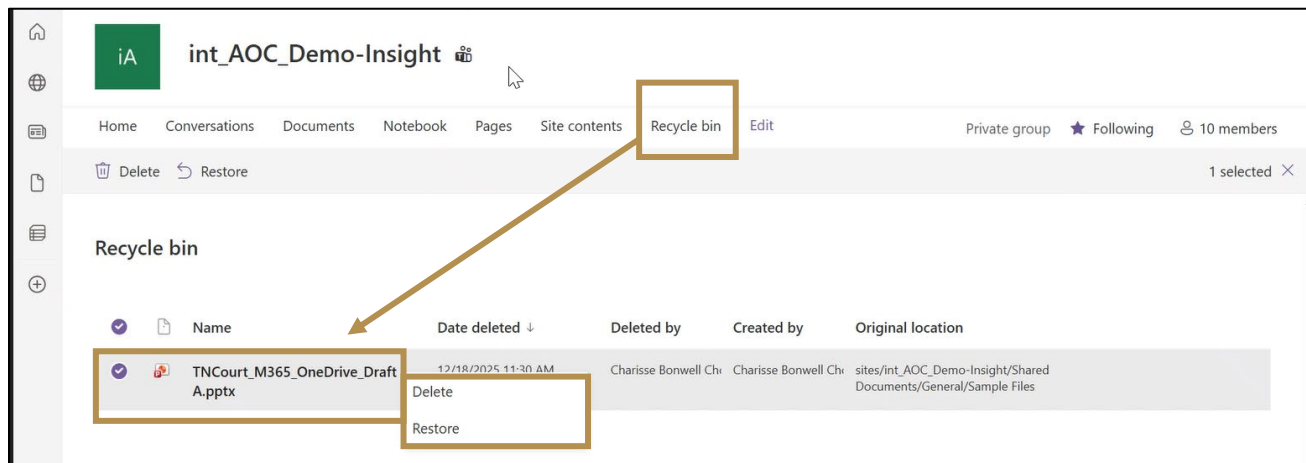
Remove a File

When a file is removed from SharePoint it is moved to the SharePoint site's **Recycle Bin**, where it remains for a set period before being permanently deleted.

To remove a file or folder:

1. Right-click on the file or click the **Show more actions for this item (ellipsis)** icon next to the file name.
2. From the menu, click **Delete**.

If you need to recover the file, you can right-click and restore it from the Recycle Bin if it has not been permanently removed.



Lesson 5

Collaboration Features

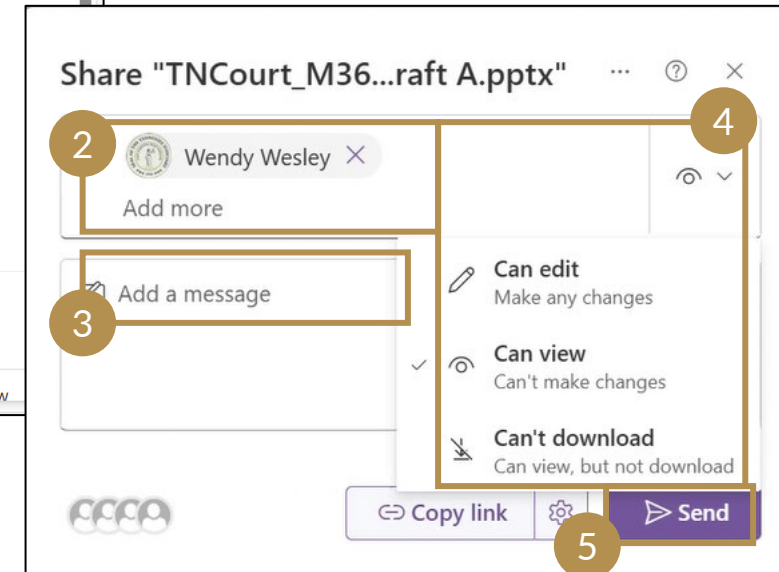
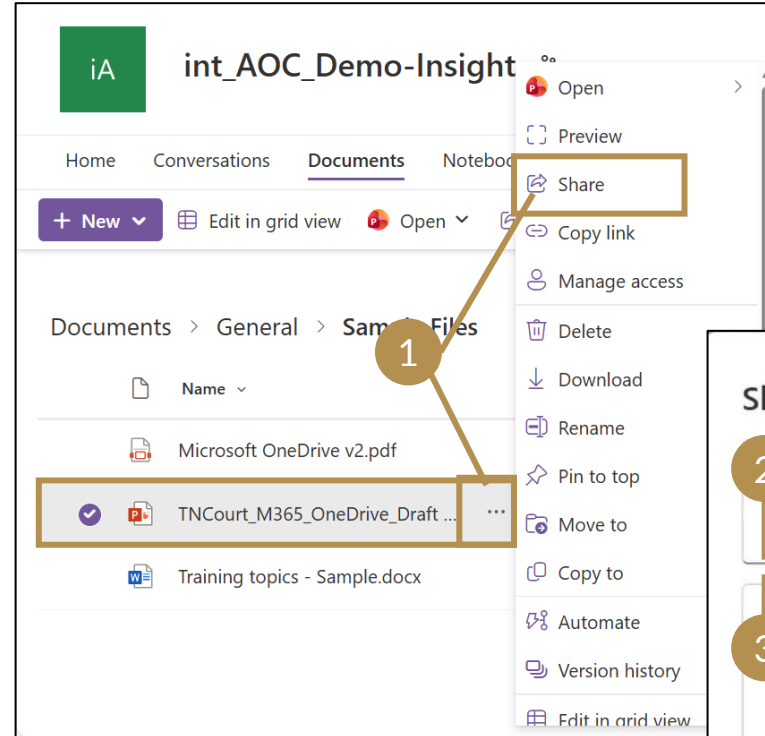
- Sharing files and folders
- Setting permissions when sharing



Sharing Files from SharePoint

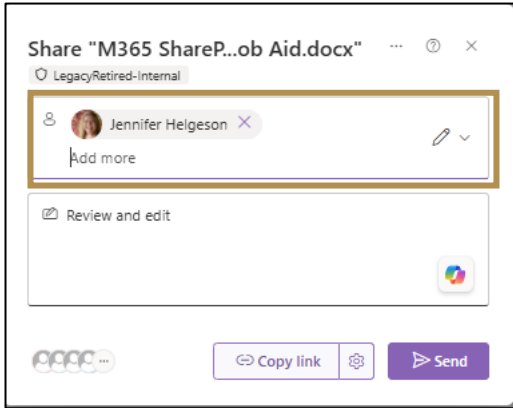
When you share files from SharePoint you do not have to send files back and forth, you do not need to rename files with version, and the latest version is always available.

1. Select the file, right-click or click the **Show more actions for this item (ellipsis)** next to the file and select **Share** from the menu.
2. Enter the name of the person you want share the file with.
3. Enter a message, if necessary.
4. Click **Edit (pencil) icon** to change the sharing permissions.
5. Click **Send**.

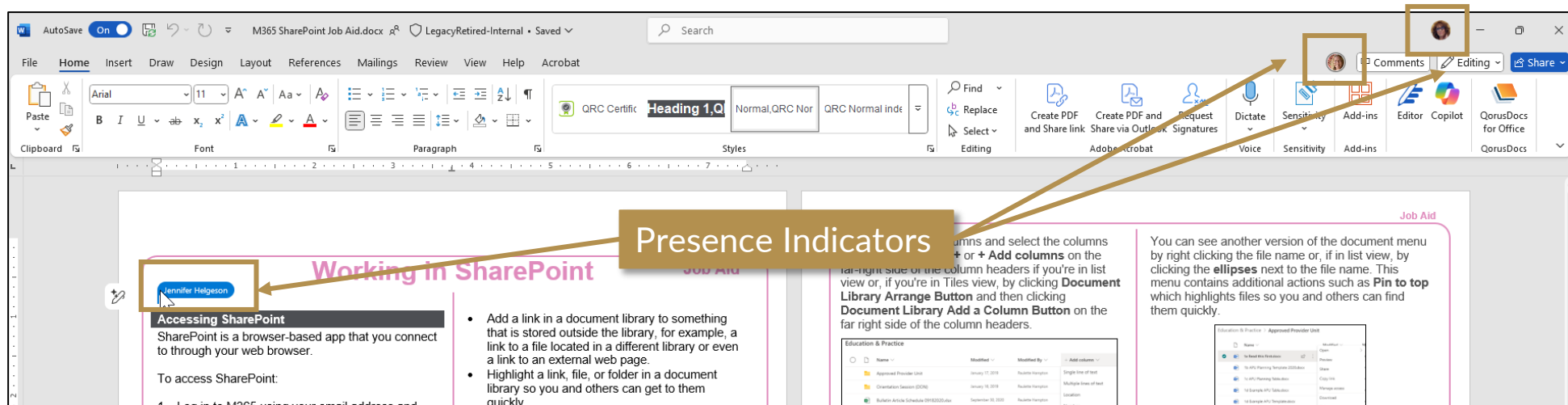


Co-Authoring Documents in SharePoint

Co-authoring in SharePoint allows multiple people to work on the same document simultaneously, whether it's a Word, Excel, or PowerPoint file.



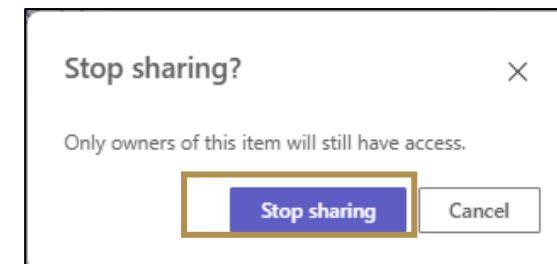
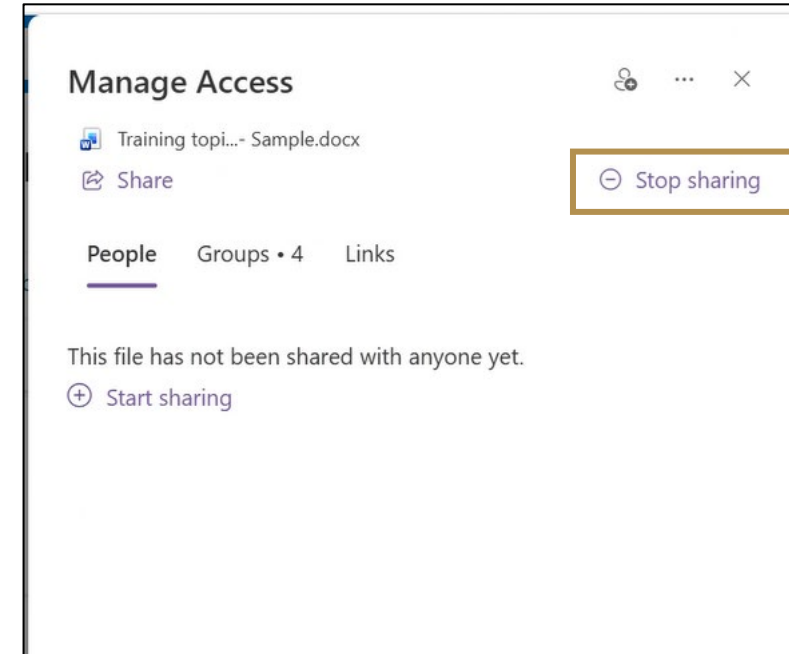
- Visual cues that show who else is currently viewing or editing a document alongside are called **Presence indicators**.
- These indicators help coordinate edits and prevent accidental overwrite, as you can see exactly where others are working and communicate within the document if needed..



Manage Access

Changes made to sharing in SharePoint are effective immediately, allowing you to tailor document access as collaboration needs evolve.

- To change permissions to files you are sharing in SharePoint, first locate the document in the SharePoint library and select it.
- Right-click on the file or click **Show more actions for this item (ellipsis)** and select **Manage access** from the menu.
- The **Manage Access** dialog box displays, click on **Stop Sharing**.
- A confirmation message displays, click on **Stop sharing**.



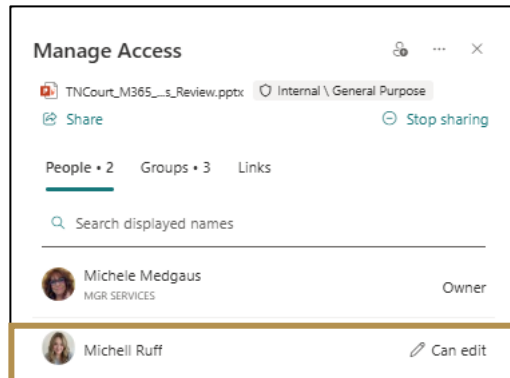
Stopping sharing removes every user who previously had access to the document.



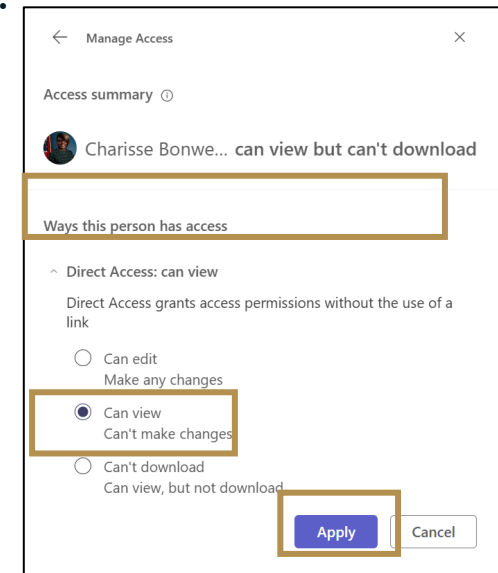
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- The **Manage Access** dialog box displays a list of people who have access to the file or folder, along with their permission levels (e.g., view or edit).



- Select the person whose access you want to change or remove and click the **Direct Access** drop down.



- From the menu, choose the permission setting you want to change or choose **Remove direct access** to stop sharing and click **Apply**.



Lesson 6

Version Control

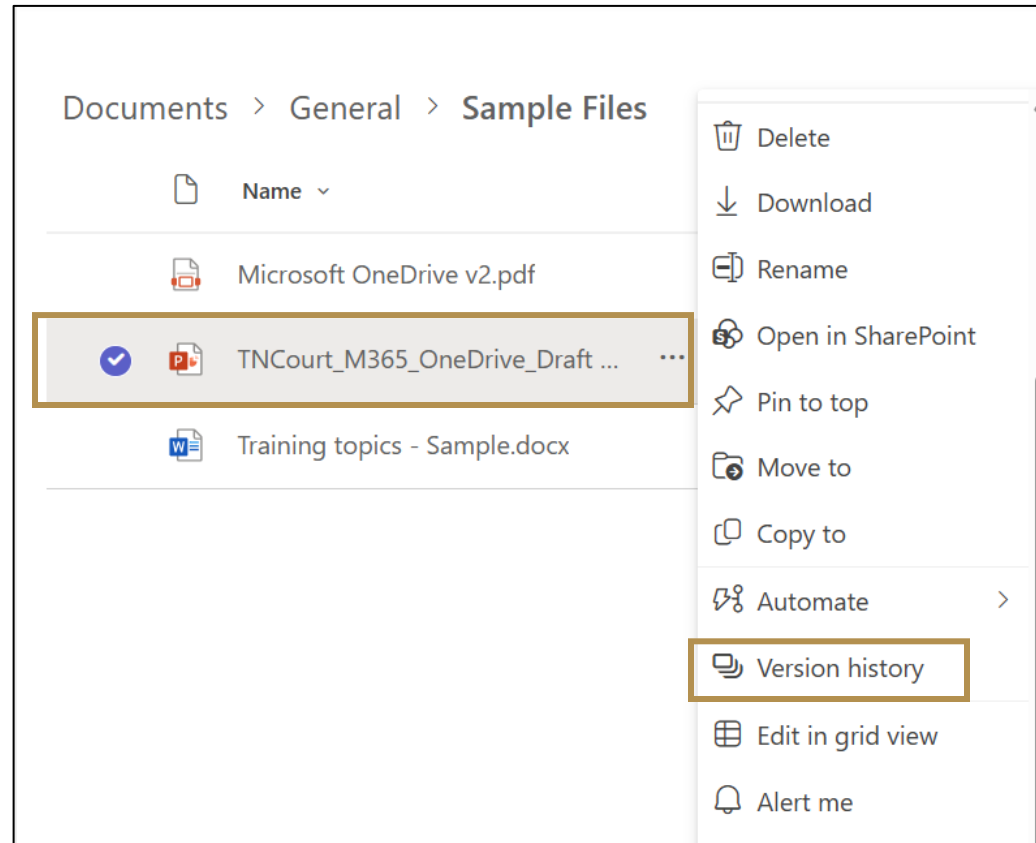
- Viewing File Versions
- Accessing the version history of a file
- Understanding what version history tracks



Version History

SharePoint's version history lets users monitor changes to a document, review or restore past versions, and compare edits, helping fix errors and support compliance audits.

1. Find the file you want to open in **SharePoint**.
2. Select the file, right-click or click the **Show more actions for this item (ellipsis)** next to the file.
3. Select **Version History**.



Viewing Version History

When you select version history in SharePoint, a detailed list of all previous versions of the document appears, including who made each change and when it was made.

1. Most recent version displays at the top.
2. Hover your mouse over the file version you wish to review and click the dropdown arrow to show the available actions.
3. Select the appropriate action:
 - **View** – Open the document
 - **Restore** – Overwrite the current version with the selected version
 - **Delete** – Remove the selected version
 - **Never expire** - Ensures that selected document versions are retained indefinitely and are not deleted automatically by any retention policy or system cleanup

Version history				
Delete All Versions				
No. ↓	Modified	Expiring in	Modified By	Size
24.0	11/18/2025 9:02 AM	Never expires ⓘ	<input type="checkbox"/> Arizona Albright	26.9 MB
23.0	11/17/2025 11:01 AM	2/16/2026	<input type="checkbox"/> Michele Medgaus	27.3 MB
22.0	11/17/2025 9:59 AM	2/15/2026	<input type="checkbox"/> Michele Medgaus	27.7 MB
21.0	11/17/2025 9:54 AM	2/15/2026	<input type="checkbox"/> Michele Medgaus	27.7 MB
20.0	11/17/2025 9:42 AM	2/15/2026	<input type="checkbox"/> Michele Medgaus	27.8 MB
19.0	11/17/2025 9:34 AM	2/15/2026	<input type="checkbox"/> Michele Medgaus	27.9 MB
18.0	11/17/2025 9:00 AM	2/15/2026	<input type="checkbox"/> Michele Medgaus	27.8 MB
17.0	11/17/2025 8:53 AM	2/15/2026	<input type="checkbox"/> Michele Medgaus	27.8 MB
16.0	11/17/2025 8:43 AM	2/15/2026	<input type="checkbox"/> Michele Medgaus	27.8 MB
15.0	11/17/2025 8:22 AM	2/15/2026	<input type="checkbox"/> Michele Medgaus	27.8 MB
14.0		2/15/2026	<input type="checkbox"/> Michele Medgaus	27.9 MB
13.0		2/15/2026	<input type="checkbox"/> Michele Medgaus	27.9 MB
12.0		2/15/2026	<input type="checkbox"/> Michele Medgaus	27.7 MB
11.0		2/15/2026	<input type="checkbox"/> Michele Medgaus	27.7 MB
10.0		2/12/2026	<input type="checkbox"/> Michele Medgaus	24.4 MB
9.0	11/14/2025 1:30 PM	2/12/2026	<input type="checkbox"/> Michele Medgaus	24.4 MB

- You cannot delete the current version.
- If a previous version is deleted, it cannot be used as a restore point.



Lesson 7

Appendix

- Justice Homepages



Quick Recap

- Introduction to SharePoint in Microsoft 365
- Accessing SharePoint
- Navigating the SharePoint Interface
- File Management Basics
- Collaboration Features
- Version Control
- Restoring Previous Versions





QUESTIONS?



THANK YOU