

M365 SharePoint Owner



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.

SharePoint Site Setup and Ownership

SharePoint Administrator creates the site and applies the base structure.

Site Maintenance

- Site owners ensure ongoing maintenance to keep the website running smoothly and efficiently.

Managing Permissions

- Managing user permissions is a key responsibility to control access and protect site content.

Content Organization

- Organizing content helps users find information easily and enhances site usability.

Site Security and Functionality

- Site owners maintain security and functionality to protect data and provide a reliable experience.

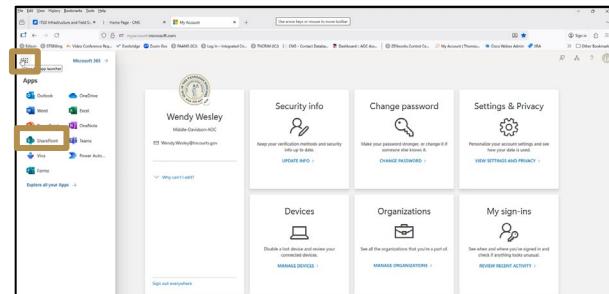
Roles and Responsibilities of a Site Owner

- Change the site theme
- Change navigation layout
- Change the site logo
- Add or remove other Site Owners
- Edit site member settings
- Add or remove Site Visitors
- Edit site settings
- Delete the site
- Associate the site with a hub
- Add and modify page content
- Add and modify page navigation via menu
- Add buttons and links
- View and update document libraries
- Manage document versions
- Adhere to TN Courts governance

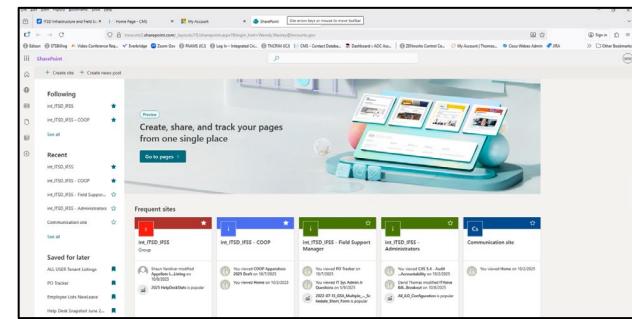
Access SharePoint on the Web

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

- Type myaccount.Microsoft.com into your internet browser, M365 opens.
- From the Navigation Pane select the **App Launcher (nine dots)** and then select **SharePoint**.



- Your SharePoint site displays.



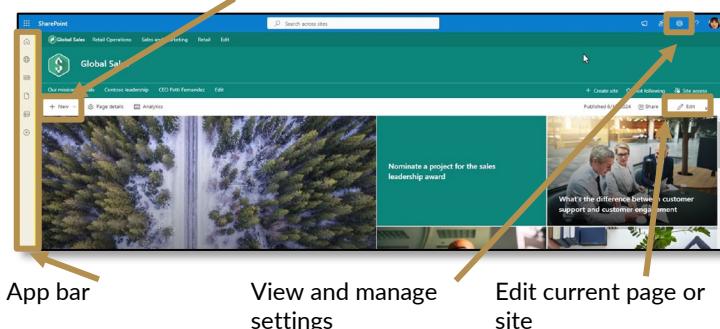
SharePoint Site Overview

Two Foundational Types of SharePoint Sites:

- Team Sites** – For internal collaboration within a team or department. More functional, less visual. Think of it as a digital office.
- Communication Sites** – For broadcasting information to a broader audience. More visual, less interactive. Think of it as a digital bulletin board or intranet homepage. A polished, branded experience for publishing content, not collaborating on it.

Navigation Overview

Page, Document Library, or News Post



Create a SharePoint Site

1. Submit a request through AOC Help Center (<https://tennaoc.atlassian.net/servicedesk/customer/portals>)
2. The Governance Team evaluates the request, need, and impact.
3. Once approved, ITSD provisions the new Site.
4. The Site owner is the person who made the request or a person identified in the ticket.

SharePoint Site Overview

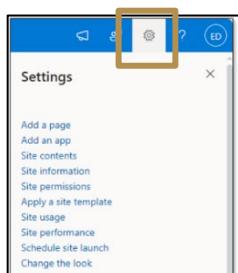
Primary Purpose	Collaboration within a team or group	Broadcasting information
Typical Audience	Small group (project team, department); many contributors, few readers	Large audience (entire org, leadership updates);
Integration with Microsoft Teams	Automatically created when a new Team is made in Microsoft Teams	Not connected to Microsoft Teams
Permissions Model	Members can contribute (edit, add, delete)	Few authors, many readers (view-only)
Homepage Layout	Focused on collaboration tools (document libraries, activity feed)	Visually rich with web parts for news, events, hero banners
Navigation	Simple, team-focused	Structured, often with hub site navigation
Content Type	Dynamic, work-in-progress documents and lists	Polished, finalized content like announcements, reports
Examples	Project collaboration, task tracking, shared files	HR portal, executive updates, company news site

Site Settings

The Governance Team will create **New Communication Sites**, but Site Owners will be able to customize the site upon its creation.

- Logo
- Navigation
- Theme
- Page layout
- Web parts

Select the **Settings icon** at the top right of your SharePoint window.



Standard Site Contents

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



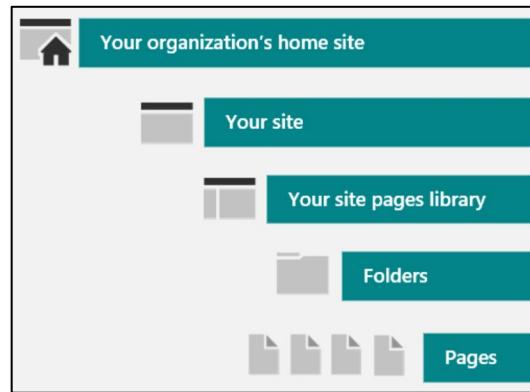
Display upcoming events using the **Events** web part.

Use the **Hero** web part to bring focus and visual interest to your page. You can display up to five items, and you can add compelling images.

You can keep your team in the loop as well as engage them with important or interesting stories by using the **News** web part.

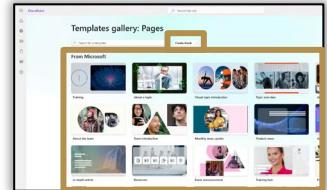
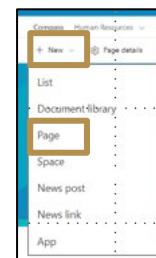
How Pages are Stored in SharePoint

- Pages that you create, save, or publish are stored in the **Pages library** for your site.
- TN Courts may have multiple sites, where each site will have its own pages library. The library may have folders where pages are organized.
- **IS Architects**



Access Page Templates

1. Open the desired site.
2. Select **New > Page**.
3. Select the desired template or select **Create blank**.



Going forward, we are logged in as **Site Owners**, with **Edit** and other permissions.

News Posts vs. News Web Part

News Post

- A SharePoint page
- Created when you want to share an update
- Lives in your site's Pages library

News Web Part

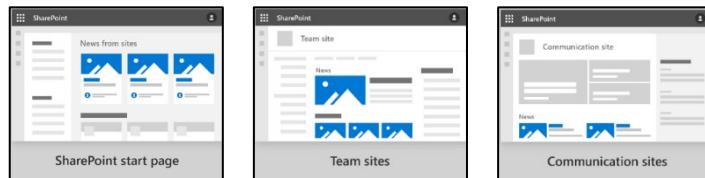
- A display tool
- Added to a page
- Pulls in and displays News posts

How They Work Together...

- You create a news post (just like creating a page).
- That post is saved in your site's Pages library.
- The News web part on your homepage automatically shows a preview of that post.
- When someone clicks it, they're taken to the full post.

Where News Can Be Shown

SharePoint start page – Automatically displayed based on relevance to user

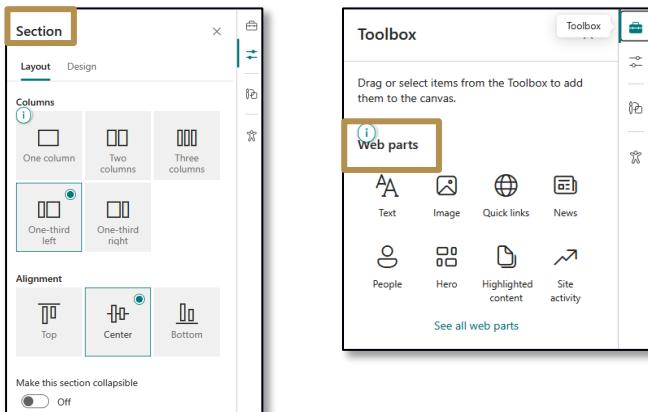


Team sites and Communication sites – When the news web part is used

Sections and Web Parts

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

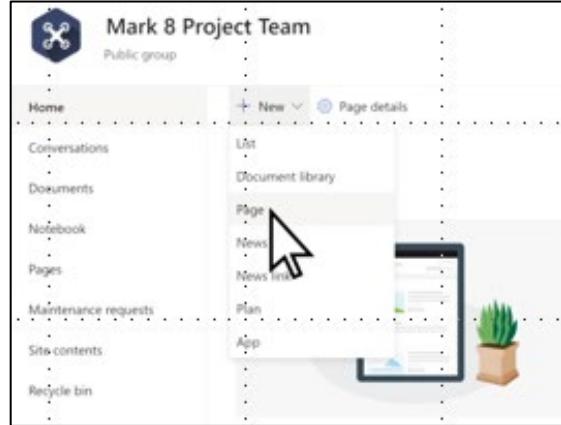
- Pages are made up of **Sections** and **Web Parts**.
- **Sections** are rows that contain various "Web Parts" that are the building blocks of your page.



Create a Page

To create a page on SharePoint, start by navigating to your SharePoint site.

1. Click the **New** button at the top of the site, then select **Page** from the dropdown menu.
2. Choose a page template or start with a blank page.
3. Add your desired web parts, such as text, images, or the Hero web part, to highlight important content.
4. Once you've finished customizing the page, click **Publish** to make it visible to your audience.



You can always edit and update the page later as your needs change.

Edit a Page

To edit a page in SharePoint, navigate to the page you want to update.

1. Select the **Edit** button at the top right.
2. The page opens in edit mode, allowing you to add, remove, or modify web parts, update text, and change images as needed.
3. After making your changes, select **Republish** to save and make your updates visible to others.
4. If you need to discard your changes, you can click **Discard changes** before republishing.

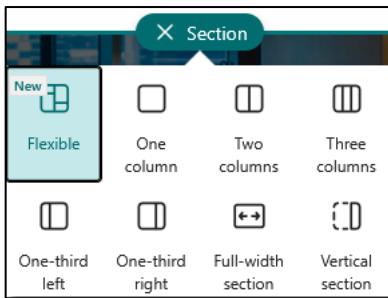
Only **one** person can actively edit a SharePoint online page at a time. If someone else tries to edit the same page, they'll see a message like: *"This page is currently being edited by [name]."*

SharePoint **auto-saves** changes and maintains version history, so if someone does overwrite a page, you can restore the previous version.

Add a Section to a Page

Using sections helps organize content visually and allows you to highlight different types of information on your SharePoint page.

1. Navigate to the **SharePoint** site and open the page you want to edit.
2. Click the **Edit** button in the top right corner to enter edit mode.
3. Hover your mouse over the area of the page where you want to insert a new section.
4. Click the plus (+) button, then choose **Section** from the options.
5. Select the layout for your new section (such as one column, two columns, or other available options).

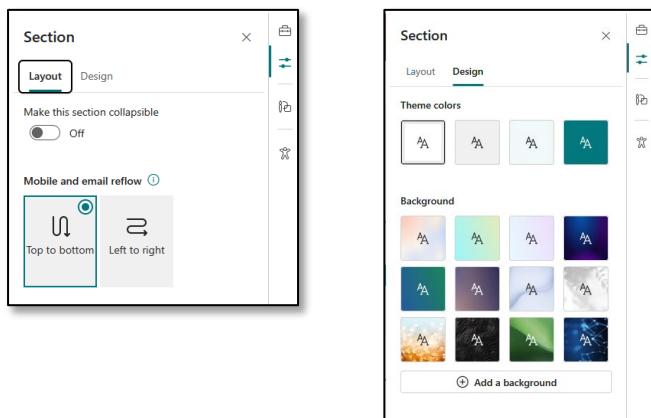


6. Add web parts, text, images, or other content within the new section as needed.
7. Once you're finished, click **Republish** to save your changes and make the updated page visible to others.

Edit an Existing Section Page

To edit an existing section on a SharePoint page, begin by navigating to the page you want to update.

1. Click the **Edit** button in the top right corner to enter edit mode.
2. Locate the section you wish to modify, click inside the section, or use the controls that appear to add, rearrange, or remove web parts, text, or images as needed.

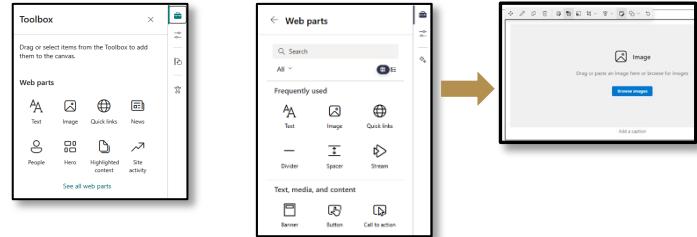


3. You can also adjust the layout of the section by selecting new column arrangements or changing formatting options.
4. Once you have made your desired changes, click **Republish** to save and make the updates visible to others.

Add Web Parts

To add web parts in SharePoint, first navigate to the page you want to edit.

1. Click the **Edit** button in the top right corner.
2. In **Edit** mode, click **Add a new web part** (+ plus sign) and select **Web parts** to insert Images, **See all web parts** for more options.



4. Select the web part and customize it by configuring its settings as needed.
5. When you're finished, click **Republish** to save your changes and update the page for others to see.

Each web part has its own interface for editing, given the nature of the content.

Move or Remove a Web Part

Moving or Removing a Web Part helps you manage your page layout and content efficiently.

- In **Edit** mode, select the **web part** you want to move or remove. You will see a small toolbar on the left side of the web part
- To move the web part, select the **Move web part button** and drag the web part where you want it on your page.
- To remove the web part, select the **Delete web part button**.
- You can also select **DEL** on the keyboard to delete.

If you accidentally remove a Web Part, you can use the page's version history to restore a version. Some Web Parts may have custom settings or permissions.

Discard Changes and Undo

Edits made to pages are saved automatically, almost immediately.

You can **Undo (Ctrl + Z)** and **Redo (Ctrl + Y)**, just like in other Microsoft tools.

Use the **Discard changes** button to revert to the previous version of the page.

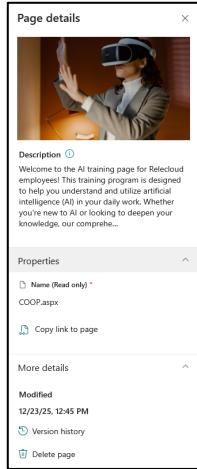
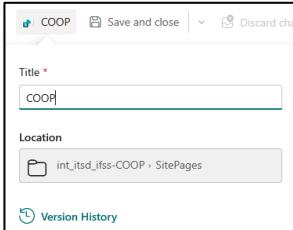


You can also restore previous versions using the version history feature in Site Pages libraries.

View Page Version History

Version History display a list of all previous versions, including details like the date modified, the user who made each change, and any version comments

1. Navigate to the **Site Pages** library where the page is stored.
2. Select **Page details** and then select **Version history**.



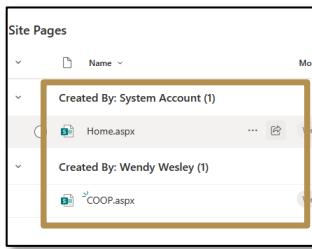
View Pages Library

The **Pages library** in SharePoint is a specialized document library that stores all site pages, including news posts and standard content pages.

1. Go to the site where your page is located. Select **Settings** button on the upper right, then select **Site Contents**.
2. On the **Site Contents** page, select **Site Pages**.



3. Look for the name of your page in the **Name** column. It may be in a folder.



Understanding Pages vs News Posts

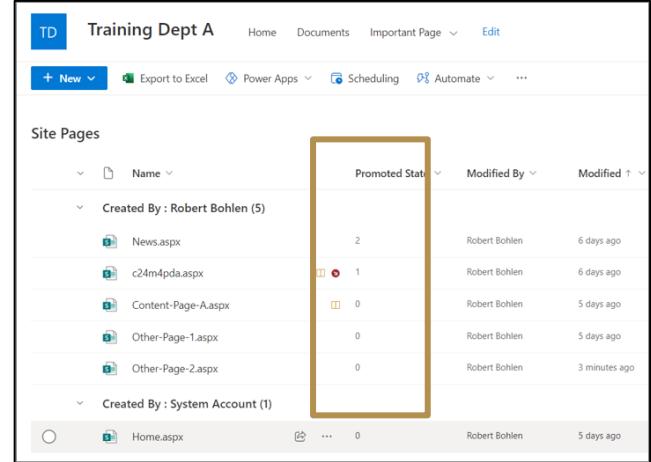
Pages and **News Posts** can be edited, published, and managed to keep your SharePoint site up to date and relevant.

- Both pages and news posts are saved in **Site contents > Site Pages**.

Promoted states in SharePoint refer to the status of a page, which determines how and where it appears across your site.

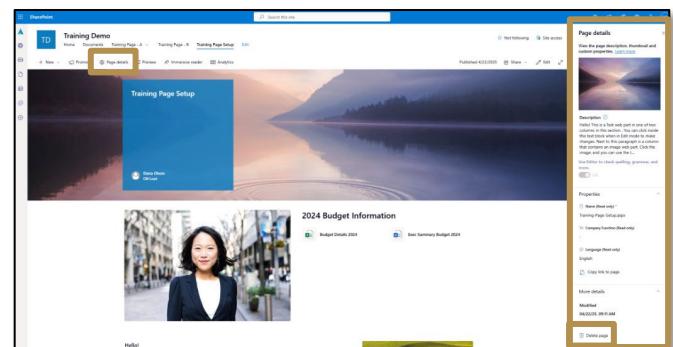
- 0 = page
- 1 = unpublished news post
- 2 = published news post

We strongly recommend adding **Promoted State** as a column to your Site Pages folder.



View and Maintain Page Details

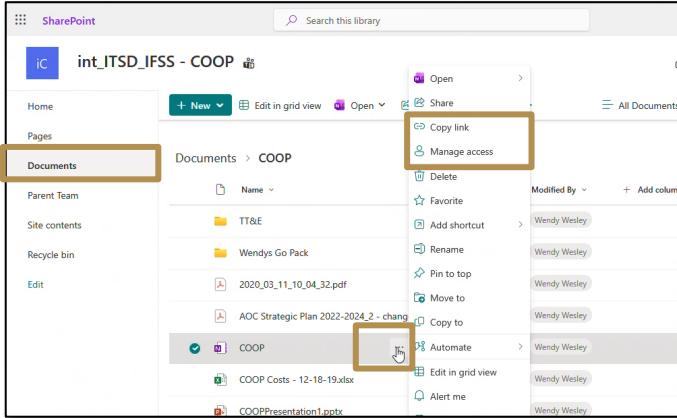
1. Select **Page details** at the top left of the Page.
2. The **Page details** appear in a pane on the right of the screen.
3. Select **Delete page** at the bottom of the pane to delete the page.



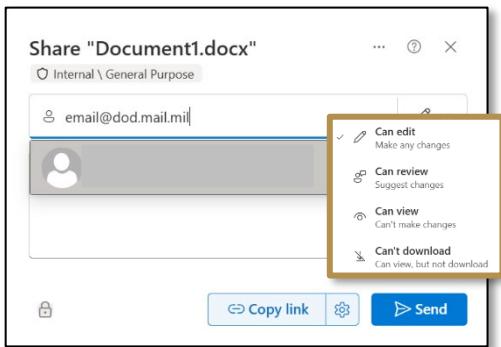
Note that deleting a page removes it for everyone.

Understanding File Access

- From the Tool Bar list, choose **Documents**.
- Hover over a file and select the **ellipsis** to view more options.
- Use **Copy** link to send a pointer to another user.



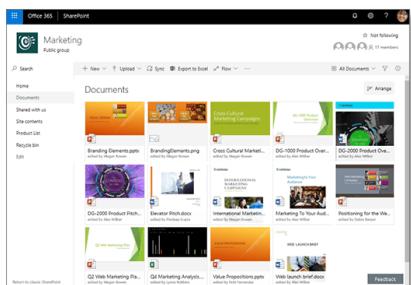
- Use **Manage access** if a user needs edit access.
- Add the name of the user and adjust the **Can edit** settings as needed, then click **Send**.



Document Libraries

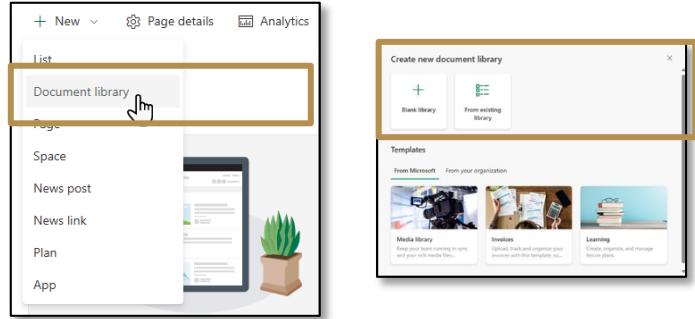
Document Libraries are a repository for files that enables easy access, collaborative editing, and file sharing, and searching and filtering. Document libraries allow you to:

- Add, edit, and delete files
- Co-author documents
- Control access
- Track file activity
- Create custom views
- Share files and folders
- Link to items outside of the library

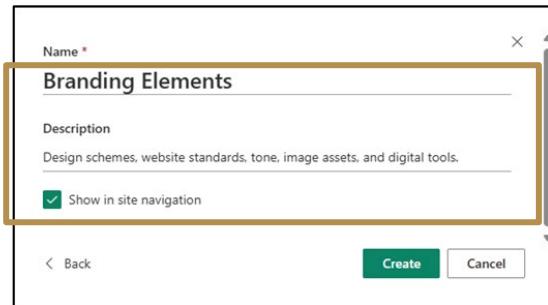


Create a Document Library

- Navigate to the site you wish to create a document library within. Click **New > Document Library**.
- Select the **library type**.



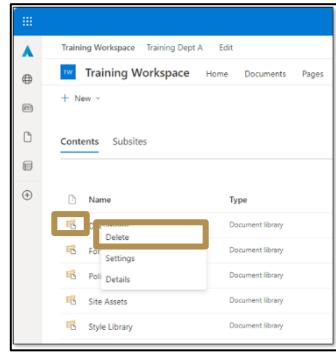
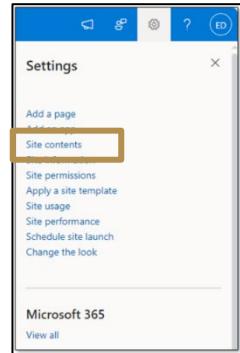
- Enter **Name** and **Description**.
- Click **Create**.



Deselect **Show in site navigation**, to keep the library for site owners, and not for viewing by site visitors.

Delete a Document Library

- Click the **Settings icon**, then select **Site Contents**.



- Navigate to the library to be deleted. Right-click on the **library icon** beside the library.
- Select **Delete**.