Microsoft 365

SharePoint Site Owner

Welcome to M365 SharePoint Site Owner

What You'll Learn Today

Overview of Microsoft SharePoint Site Owner

- Topics covered include:
  - SharePoint Access and Roles
  - SharePoint Site Overview
  - News Posts and News Web Parts
  - Create and Maintain Pages
  - Page Details, File Access, and Document Libraries
  - SharePoint Key Terms
  - Site Settings

Lesson 1

SharePoint Access and Roles

- Site Setup and Ownership

- Access SharePoint

- Site Roles and Responsibilities

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.

Streamlining Teamwork

- SharePoint facilitates communication and task management for enhanced team productivity.

Organizational Uses

- Sites cater to diverse needs like project collaboration and departmental communication within organizations.
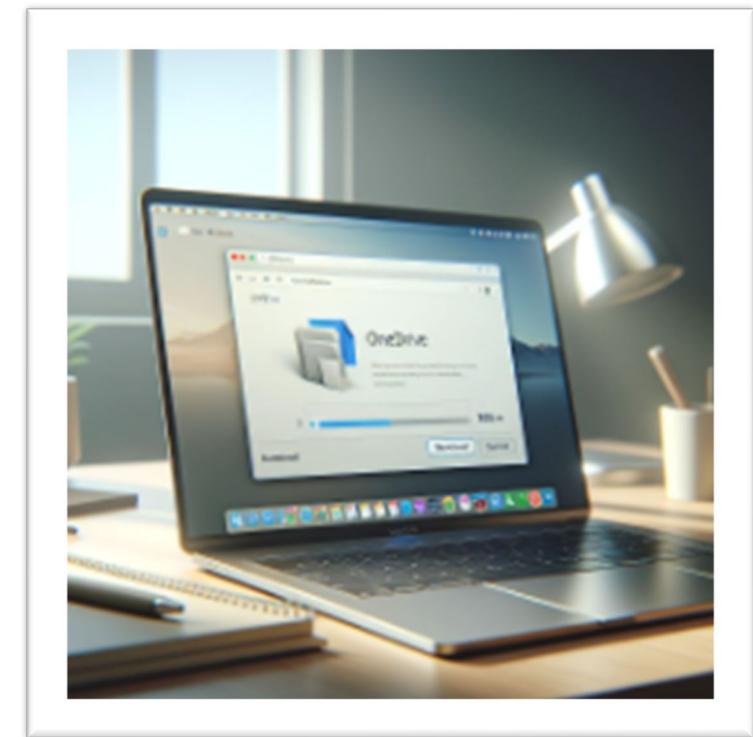
How to Access SharePoint

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.
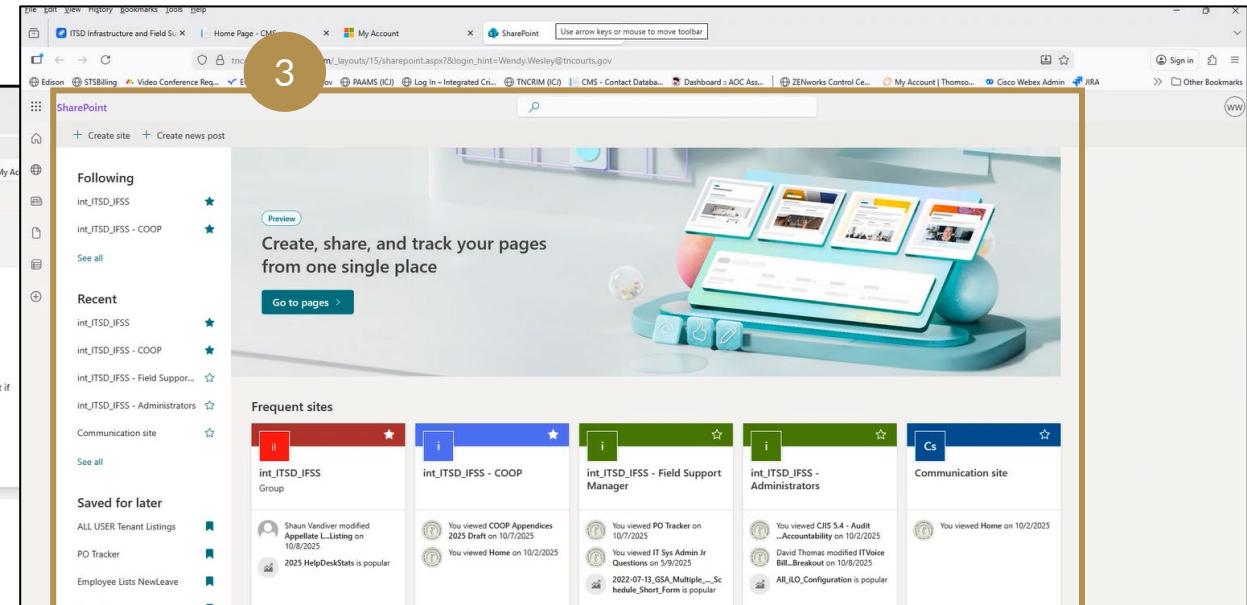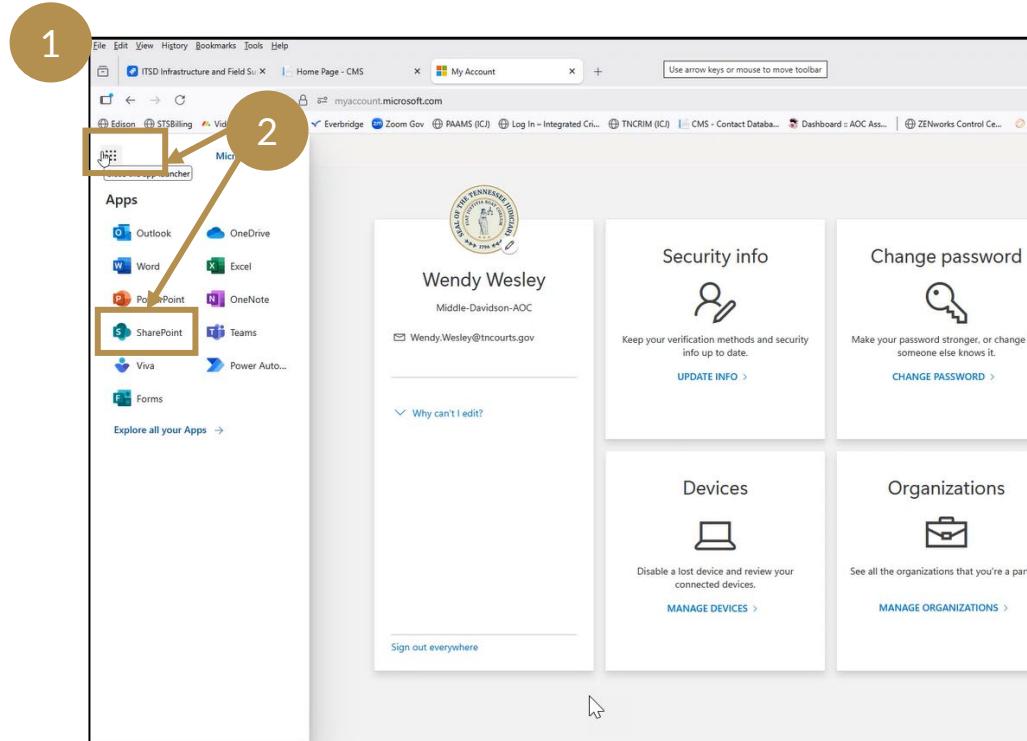
SharePoint Site Creation – TN Courts Process

What should I do before I create a new Site?

1. Define the purpose, goals and members to the site.

2. Search for an existing Site that meets these needs.

3. If there is already a Site, create a page.

4. If you are not currently a member of the Site, request access.

Use the search bar at the top of the Site app to enter keywords related to your project, department, or team name.

Creating a SharePoint Site

- Submit a request through AOC Help Center (https://tennaoc.atlassian.net/servicedesk/customer/portals)

- The Governance Team evaluates the request, need, and impact.

- Once approved, ITSD provisions the new Site.

- The Site owner is the person who made the request or a person identified in the ticket.

CREATING A SHAREPOINT SITE

Supreme Court Justices SharePoint Sites

Supreme Court Justices	Site Name	Site Owner
Chief Justice Bivins	• int_SC_JBivins	• Taylor York
Justice Kirby	• int_SC_HKirby	• Dottie Smith
Justice Tarwater	• int_SC_DTarwater	• Barrett Hobbs • Morgan Fitzgerald
Justice Wagner	• int_SC_MWagner	• Justice Mary Wagner
Justice Campbell	• int_SC_SCampbell	• Taylor York
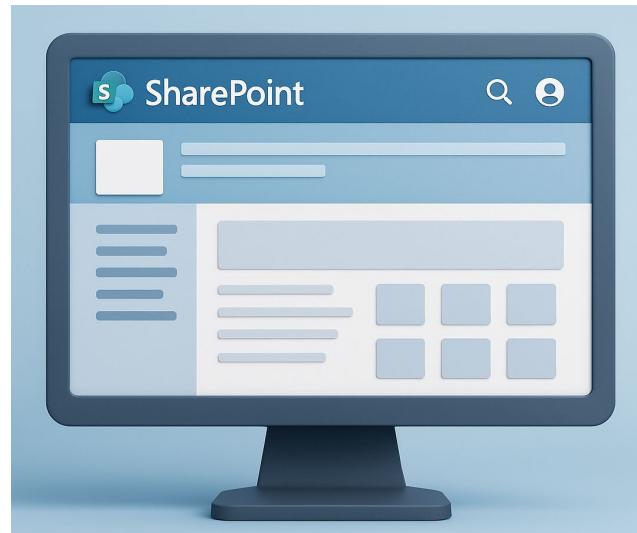
Roles and Responsibilities of a Site Owner
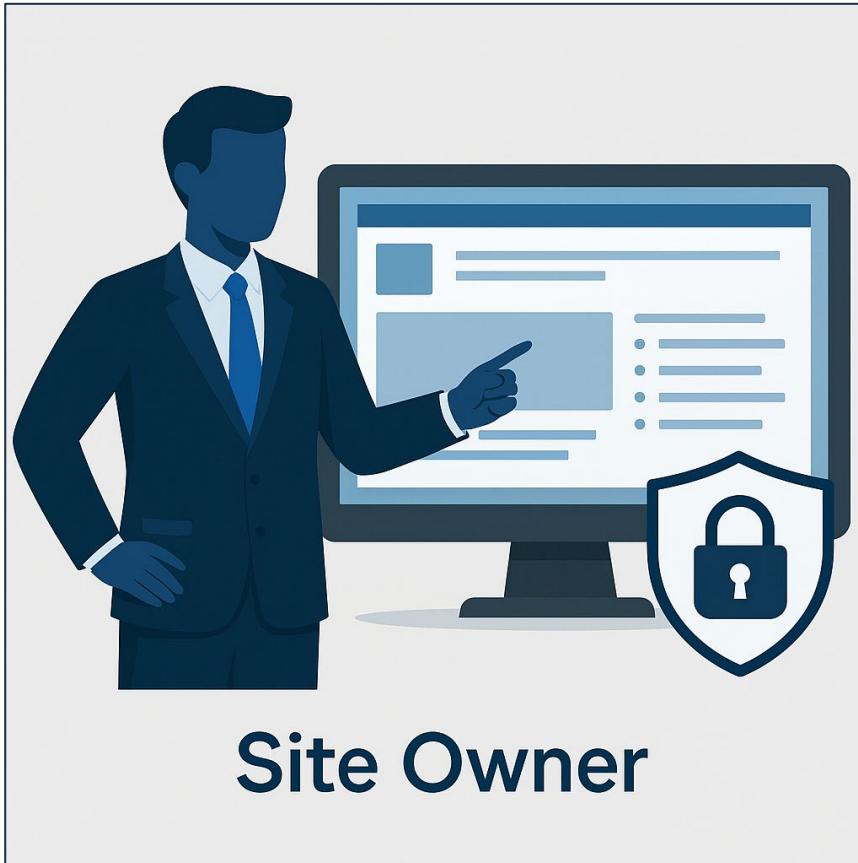
Site Maintenance

- 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.

Site Owner

Roles and Responsibilities of a Site Owner

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 to 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

Site Visitor
- Read-only access
- View content

The majority of TN Courts

Today's training audience

Lesson 2

SharePoint Site Overview

- Site Overview

- Navigation Overview

- Site Settings

- Standard Site Contents

- How Pages are Stored in SharePoint

SharePoint Site Overview

Feature	Teams Site (Team Site)	Communication Site
Primary Purpose	Collaboration within a team or group	Broadcasting information to a wide audience
Typical Audience	Small group (project team, department); many contributors, few readers	Large audience (entire org, leadership updates); many readers, few contributors
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

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.

- You need to share information broadly across the organization.
- You want a polished, branded experience.
- You're publishing content, not collaborating on it.

Site Examples
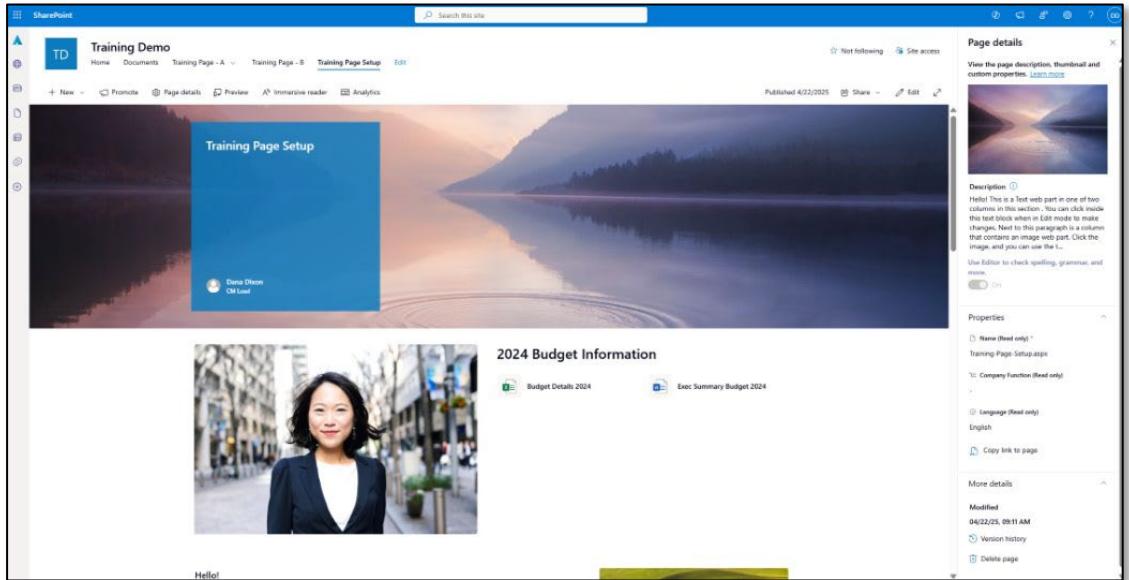
| Team Site Example	Communication Site Example

Navigation Overview

Page, Document Library, or News Post

View and manage settings

App bar

Edit current page or site

The screenshots provided reflect a test environment. Your experience may vary.

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.

Here, you can select settings related to Site contents, Site permissions, and more.

Select Site information and then click Delete Site.

Select Site usage and Site performance to review data

Learn more
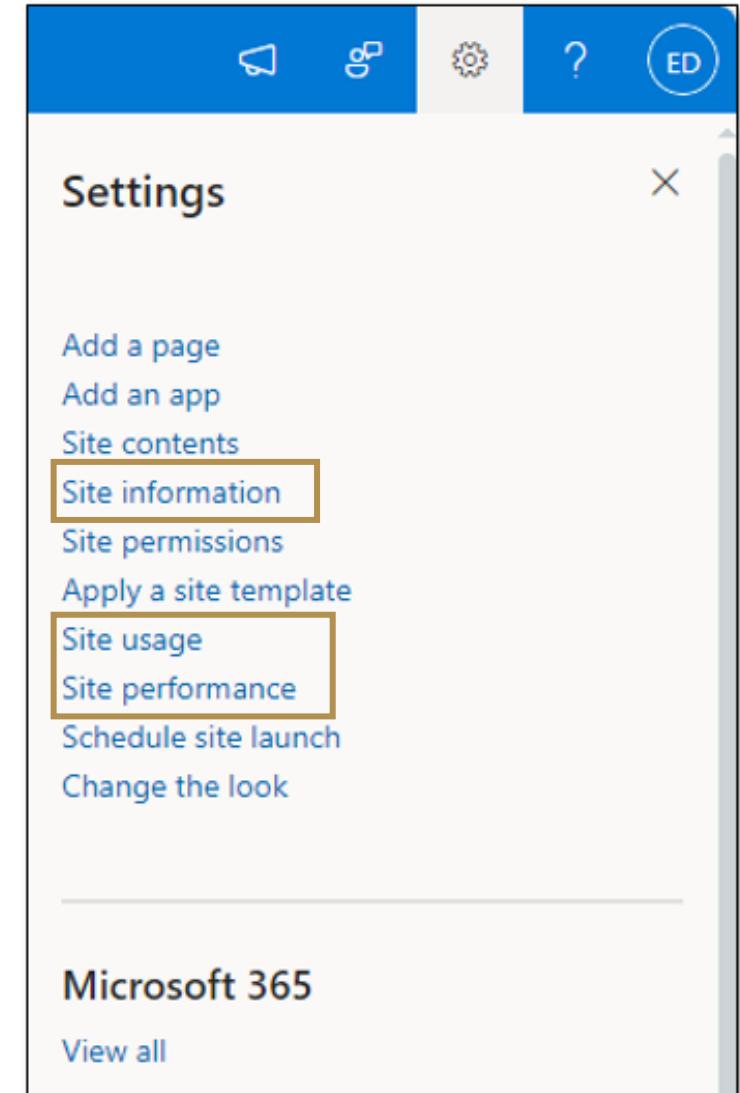
Settings
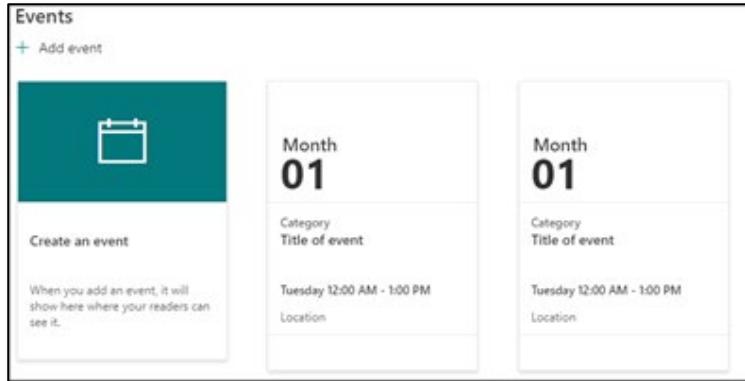
Add a page
Add an app
Site contents
Site information
Site permissions
Apply a site template
Site usage
Site performance
Schedule site launch
Change the look

Microsoft 365

View all

Standard Site Contents

Display upcoming events using the **Events** web part.
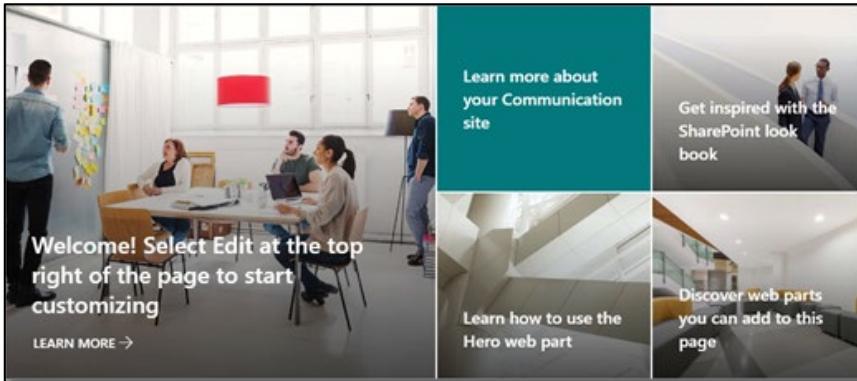
Use the **Hero** web part to bring focus and visual interest to your page. You can display up to five items, and you can add compelling images.
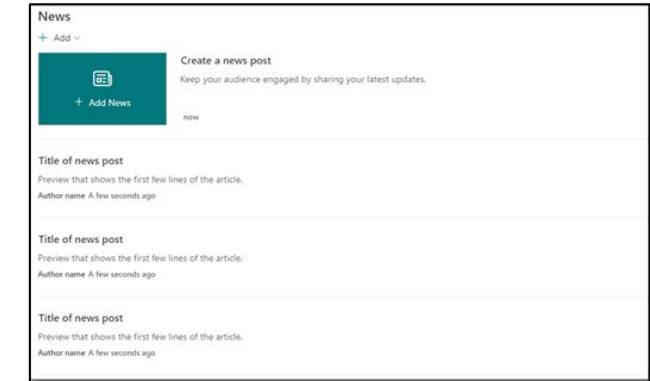
You can keep your team in the loop as well as engage them with important or interesting stories by using the **News** web part.

How Pages are Stored in SharePoint
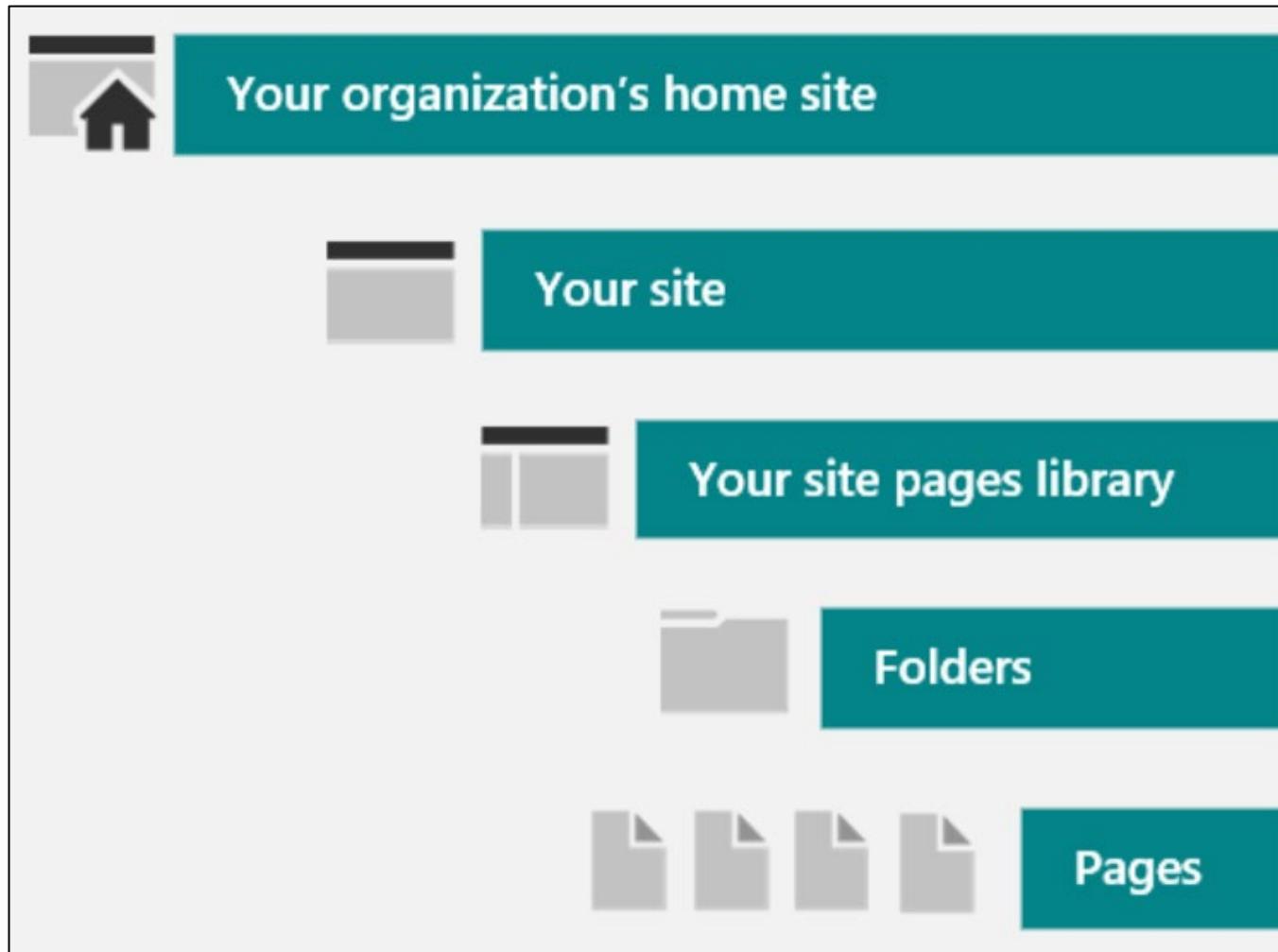
- Pages that you create, save, or publish are stored in the **Pages library** for your site.

- TN Courts may have multiple sites, where each site will have its own pages library. The library may have folders where pages are organized.

Learn more

Lesson 3

News Posts and News Web Parts

- Apply Templates

- News Posts vs. News Web Part

- Where News Can Be Shown

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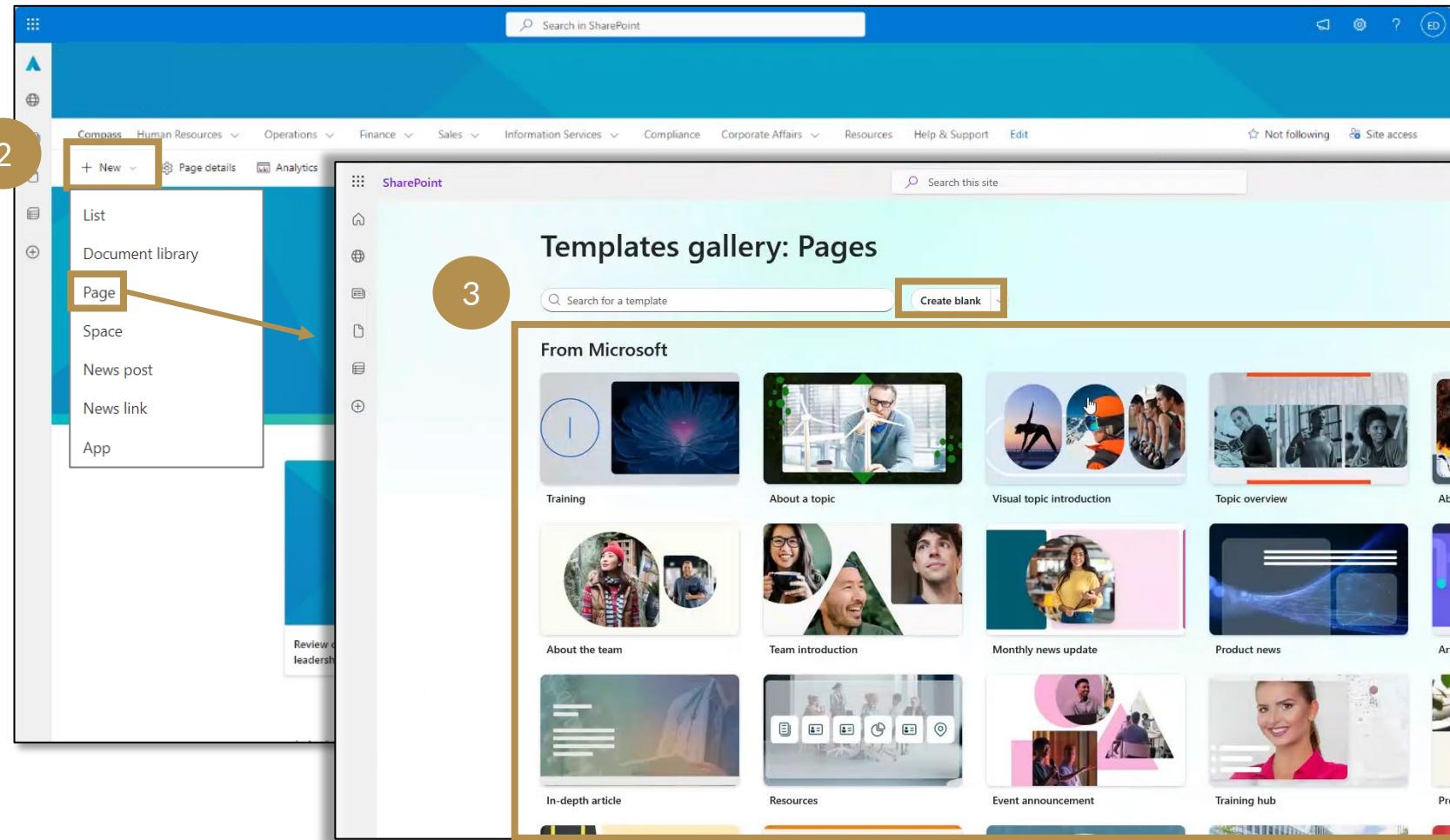
Going forward, we are logged in as **Site Owners**, with **Edit** and other permissions.

1. Open the desired site.

2. Select **New > Page**.

3. Select the desired template or select **Create blank**.

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.

The screenshots provided reflect a test environment. Your experience may vary.

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

SharePoint start page

Team sites

Communication sites
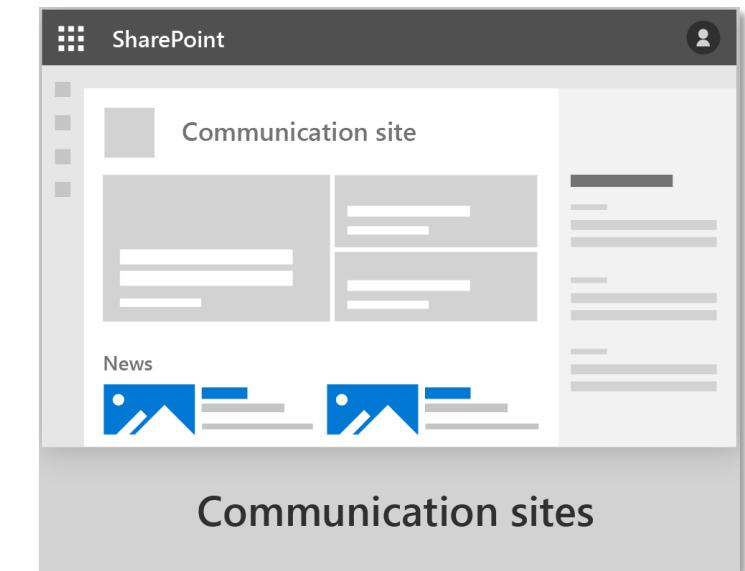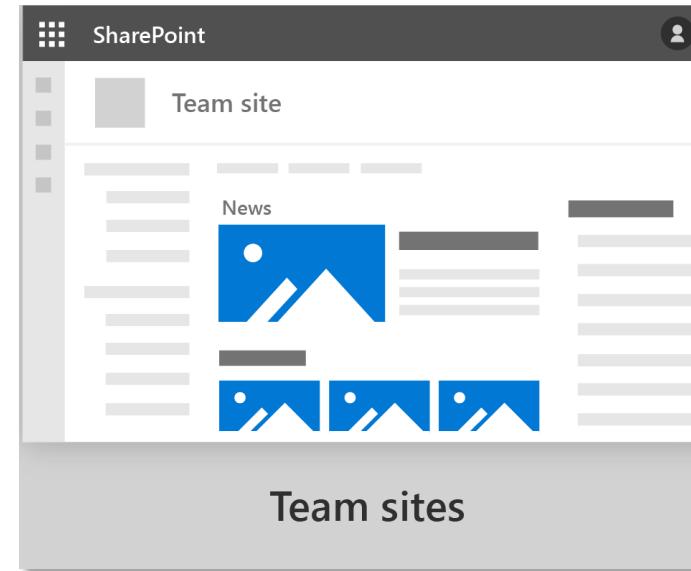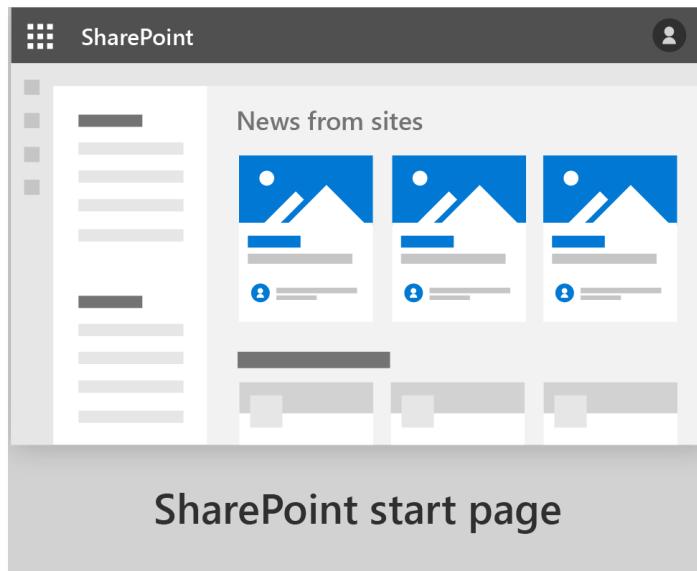
Lesson 4

Create and Maintain Pages

- Sections and Web Parts

- Create and Edit a Page

- Add and Edit Page Sections

- Add, Move or Remove Web Parts

- Discard and Undo Changes

- View Page Version History and Pages Library

- Understand Pages vs New Posts

Sections and Web Parts

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.
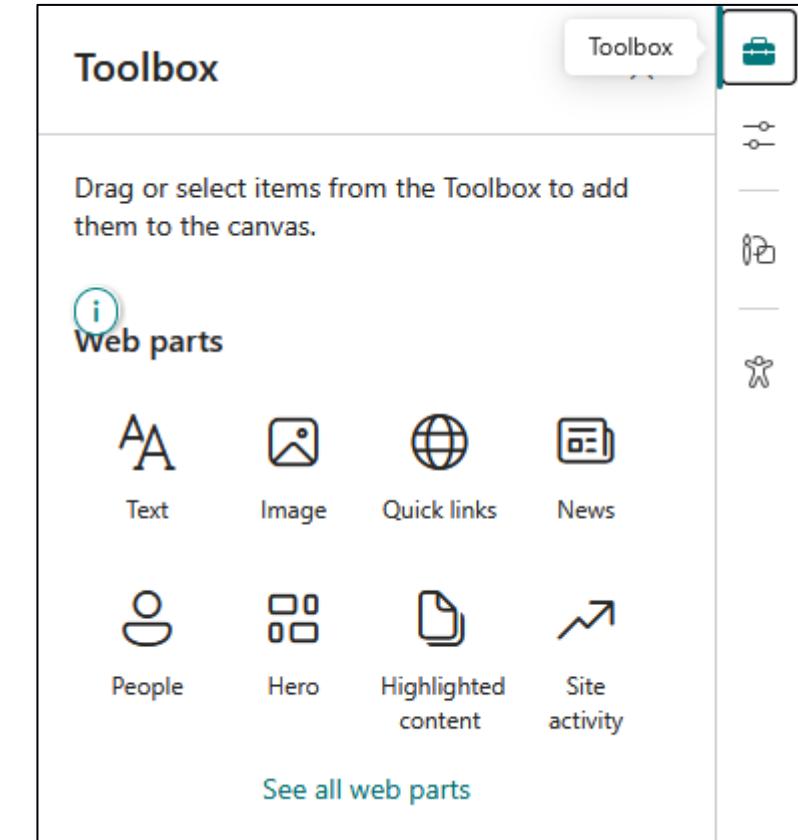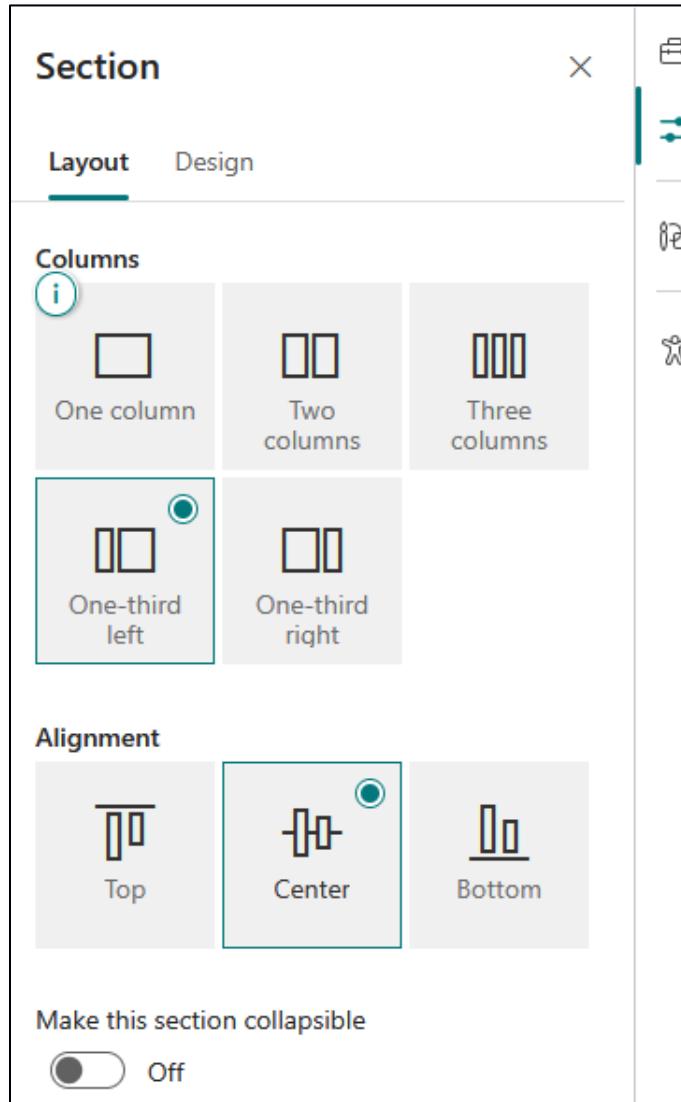
Sections

Section Types:
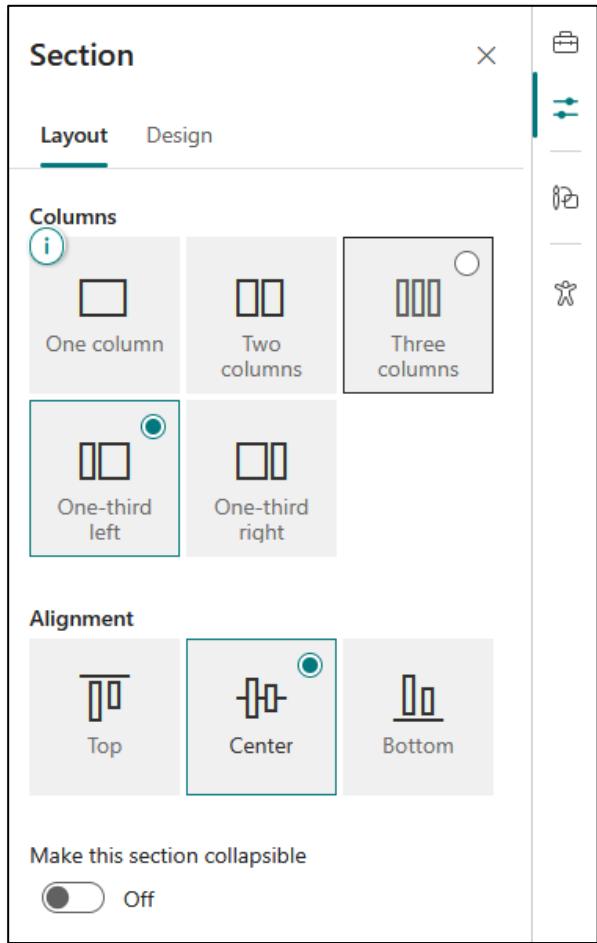
Section Editing Tools:
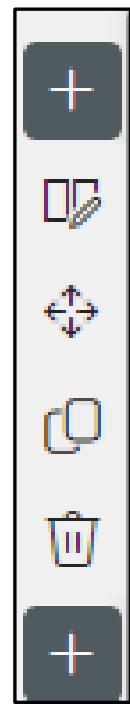
Edit section

Move section

Duplicate section

Delete section
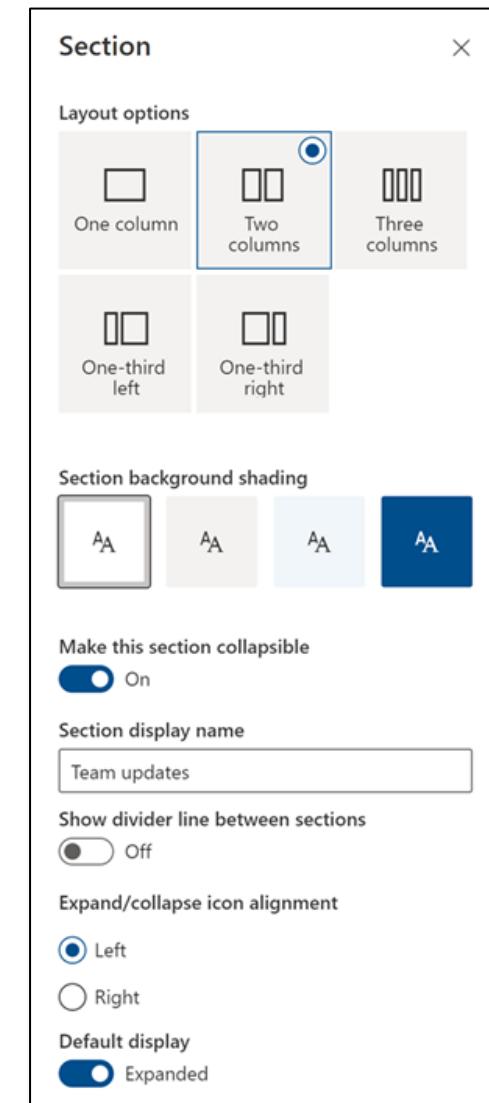
Learn more about sections.

Demo

Web Parts

## Web Part Types:
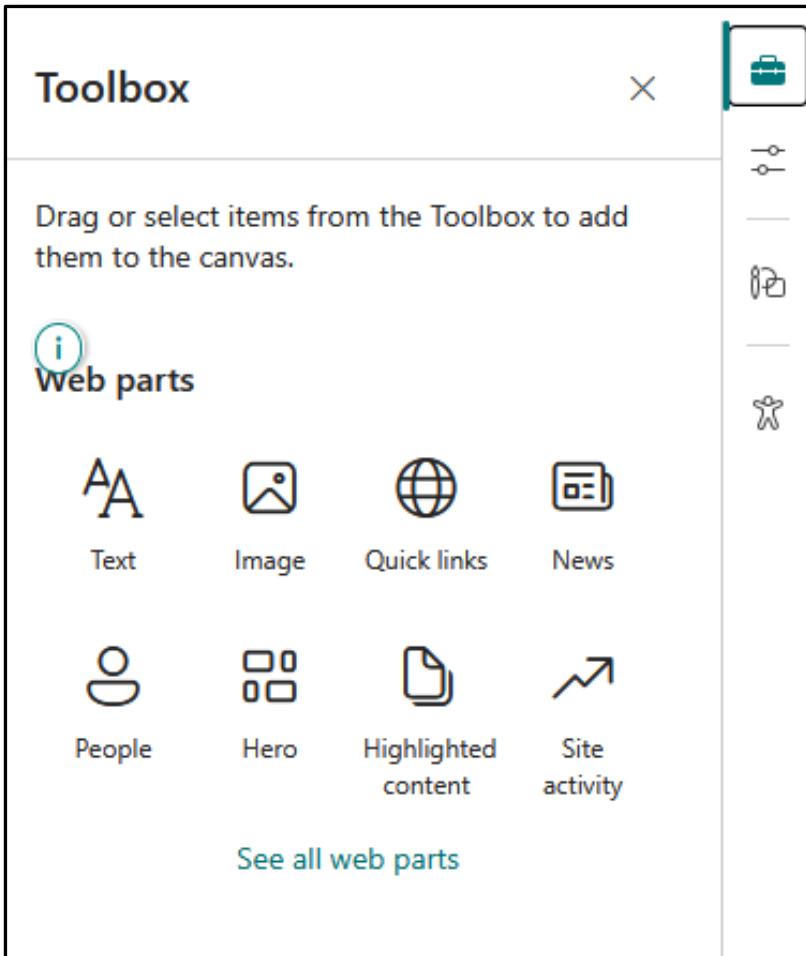
Web Part Editing Tools:

Text Web Part Tools

Image Web Part Tools

Learn more about web parts.
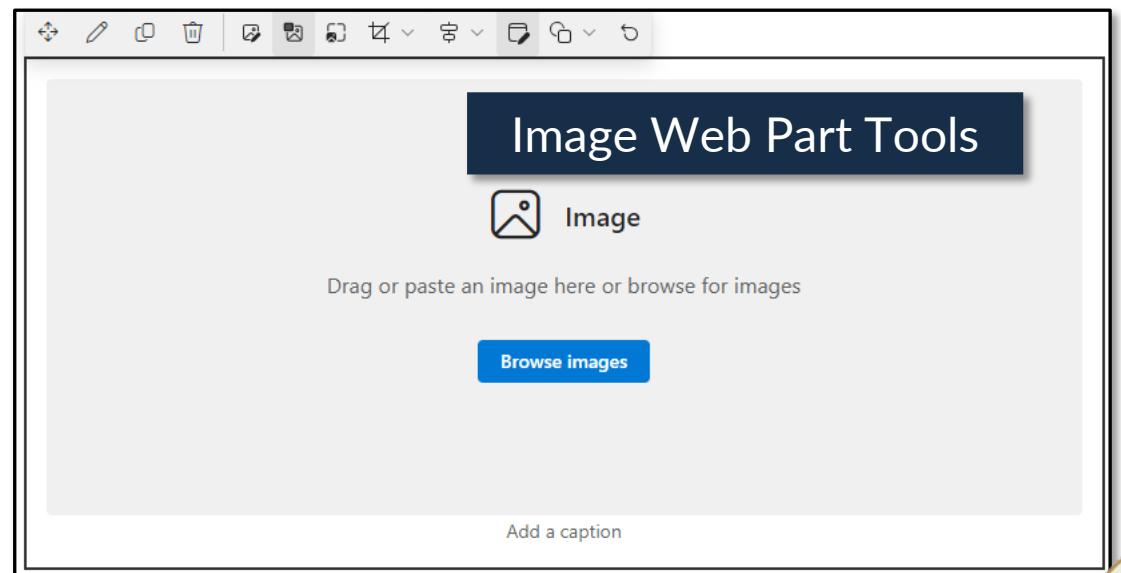
Create a Page

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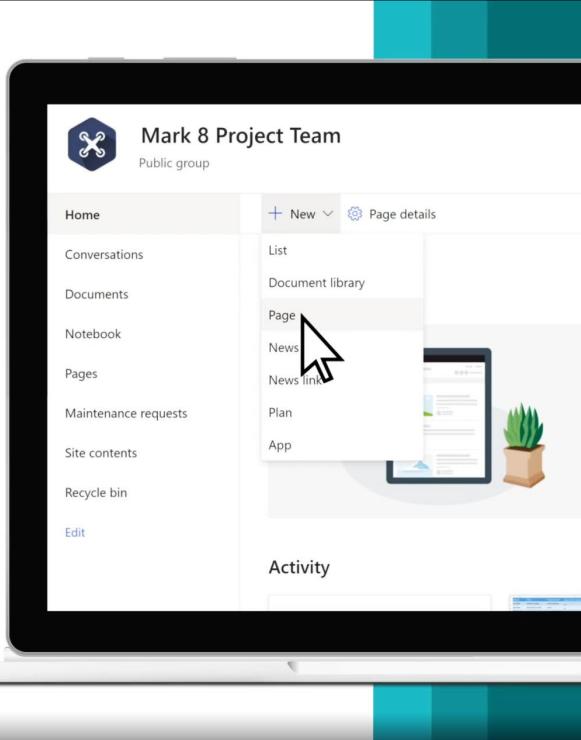
1. Click the **New** button at the top of the site, then select **Page** from the dropdown menu.
2. Choose a page template or start with a blank page.
3. Add your desired web parts, such as text, images, or the Hero web part, to highlight important content.
4. Once you've finished customizing the page,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

Video

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

Edit a Page

Select **Edit** | ✏️ Edit | at the top right.

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]."*
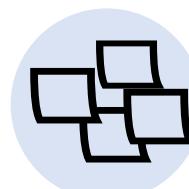
After making your changes, select **Republish** to save and make your updates visible to others.

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

Add a Section to a Page

On the section borders, you'll see a line with a circled **+**, that says **Add a new section**. Hover over the button.

Select **+ Section**.

Select the number of **columns** you want the Section to have.
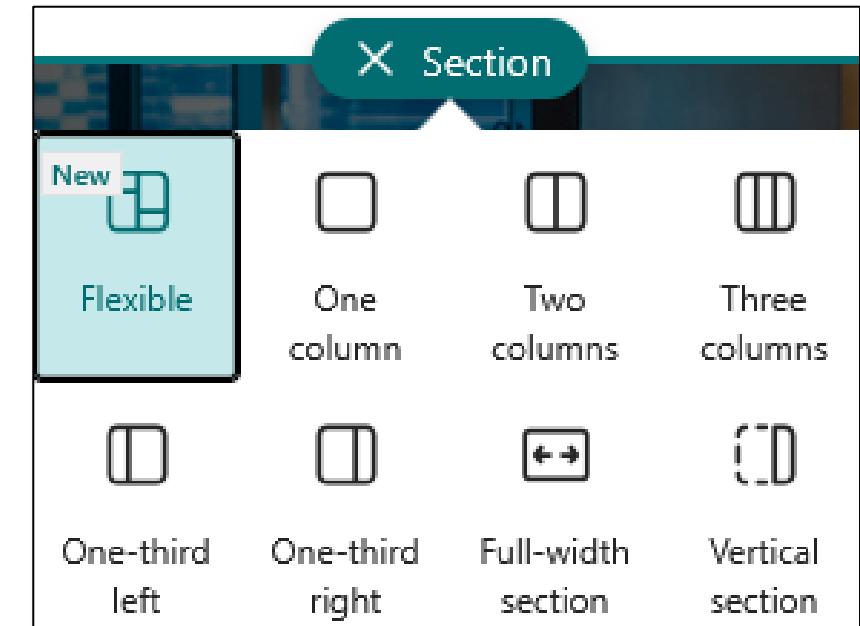
Edit an Existing Section on a Page

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

In **Edit** mode, select the **Section** you want to edit.

Select **Edit properties** in the toolbar at the top left or select the **Properties** icon on the right side of the page.

Edit the number and type of columns, realign the content within the section, or add a section background.
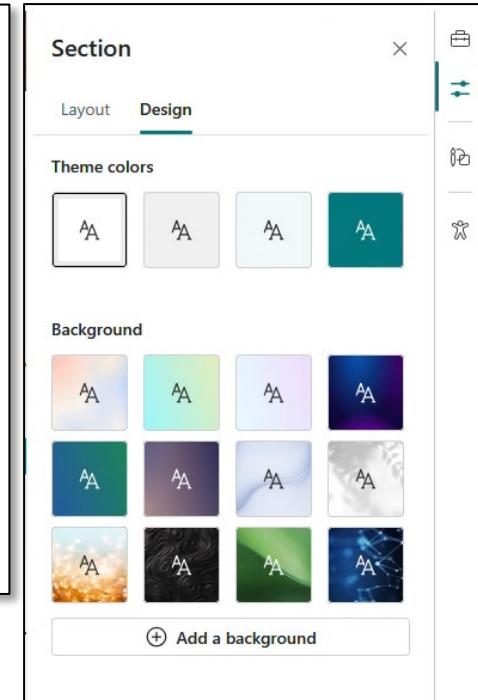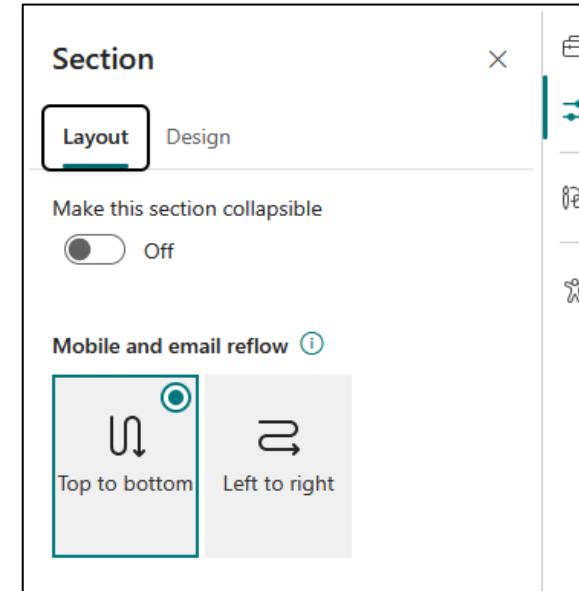
Add Web Parts

In **Edit** mode, click **Add a new web part (plus sign)** and select **Web parts** to insert Images, Quick links and more.
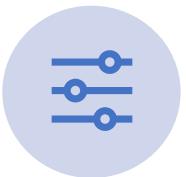
Select **See all web parts** for more options.
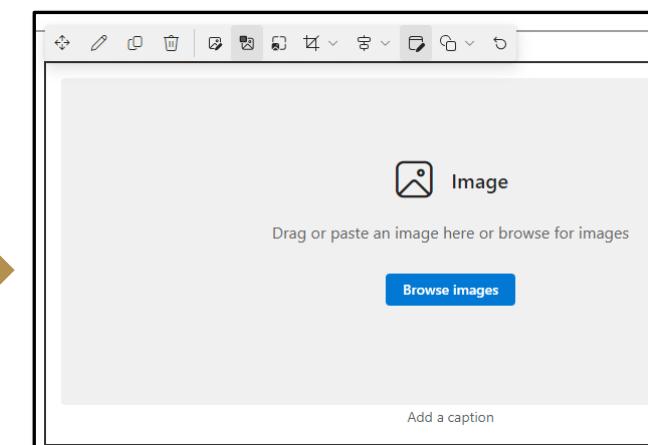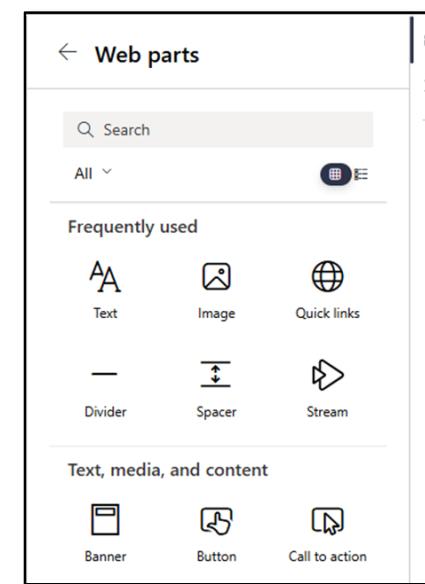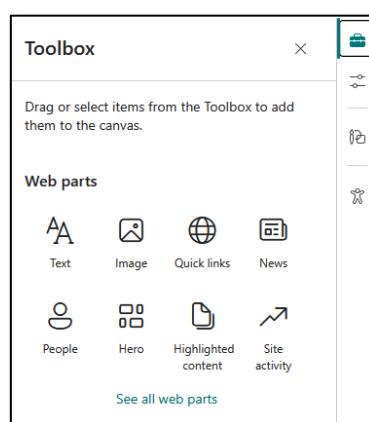
Each web part has its own interface for editing, given the nature of the content.

Move or Remove a Web Part

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.
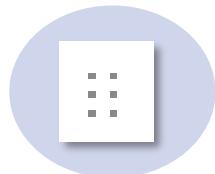
To move the web part, select the **Move web part button** and drag the web part where you want it on your page.

To remove the web part, select the **Delete web part** button.
You can also select **DEL** on the keyboard to delete.

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.

Discard changes

| Page | Save and close | ∨ | Discard change | Undo | | Page details | Preview | Analytics | | Changes not saved | | Share ∨ | Republish |
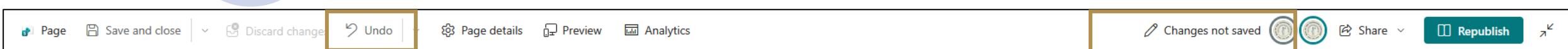
View Page Version History

1. Navigate to the **Site Pages** library where the page is stored.

2. Select **Page details** and then select **Version history**.

[Video]
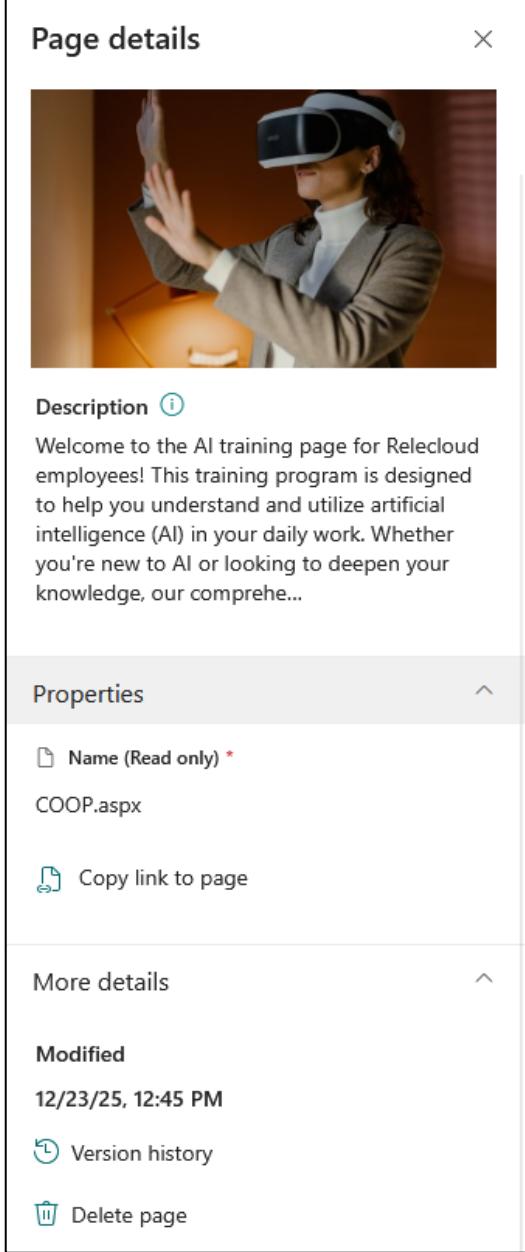
View Pages Library
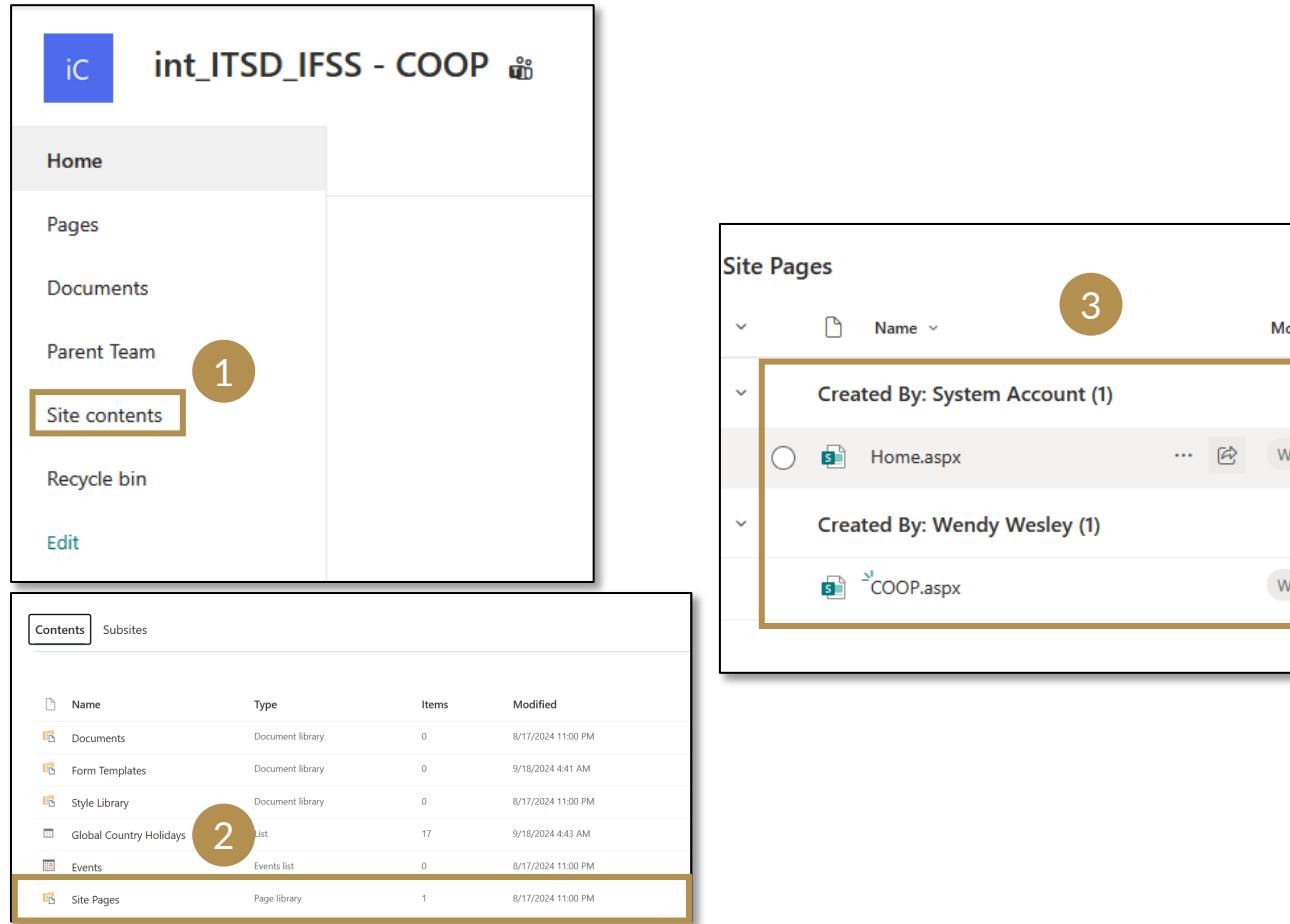
1. Go to the site where your page is located. Select **Settings** button on the upper right, then select **Site Contents**.

2. On the **Site Contents** page, select **Site Pages**.

3. Look for the name of your page in the **Name** column.

Note: It may be in a folder.

Understanding Pages vs News Posts

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

Promoted States:

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

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

Learn more

The screenshots provided reflect a test environment. Your experience may vary.

Lesson 5

Page Details, File Access, and Document Libraries

- View and Maintain Page Details

- Understanding File Access

- Create and Delete Document Libraries

View and Maintain Page Details
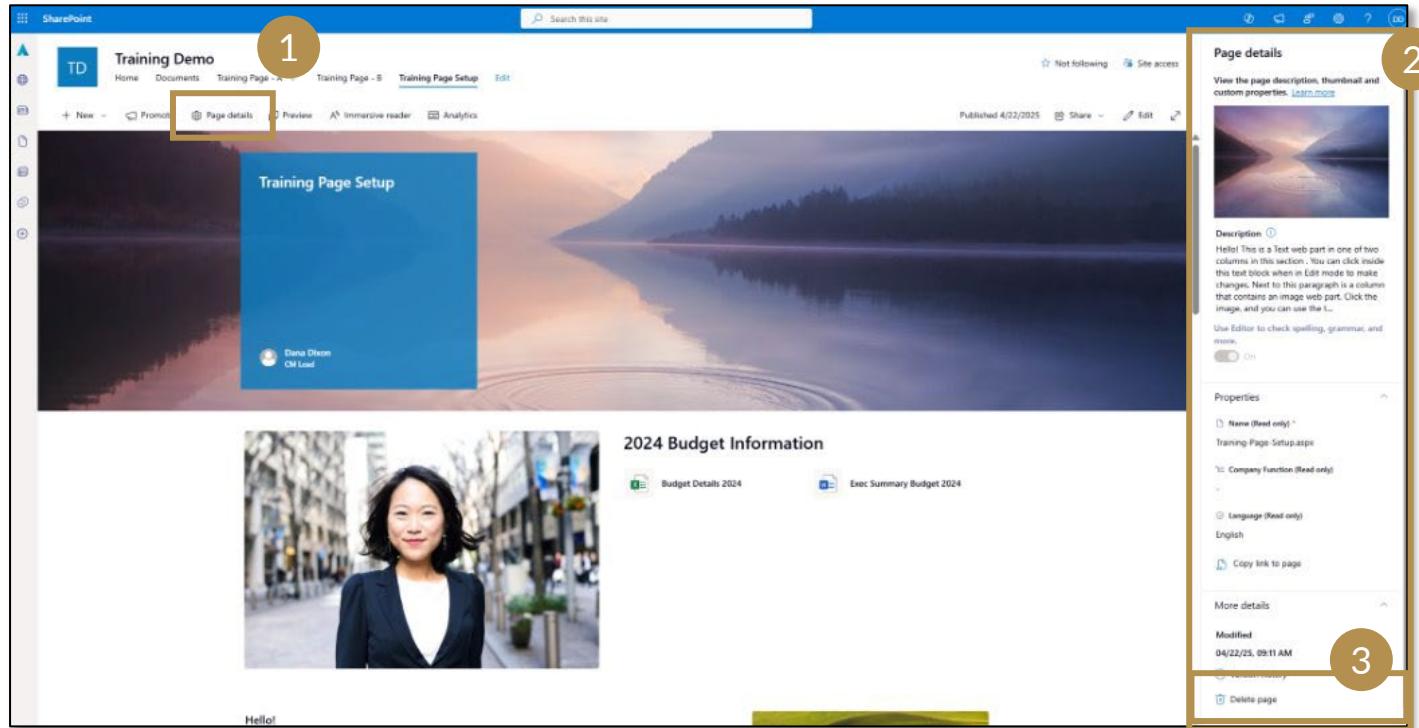
1. Select **Page details** at the top left of the Page.

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.

The screenshots provided reflect a test environment. Your experience may vary.

Note that deleting a page removes it for everyone.

Understanding File Access
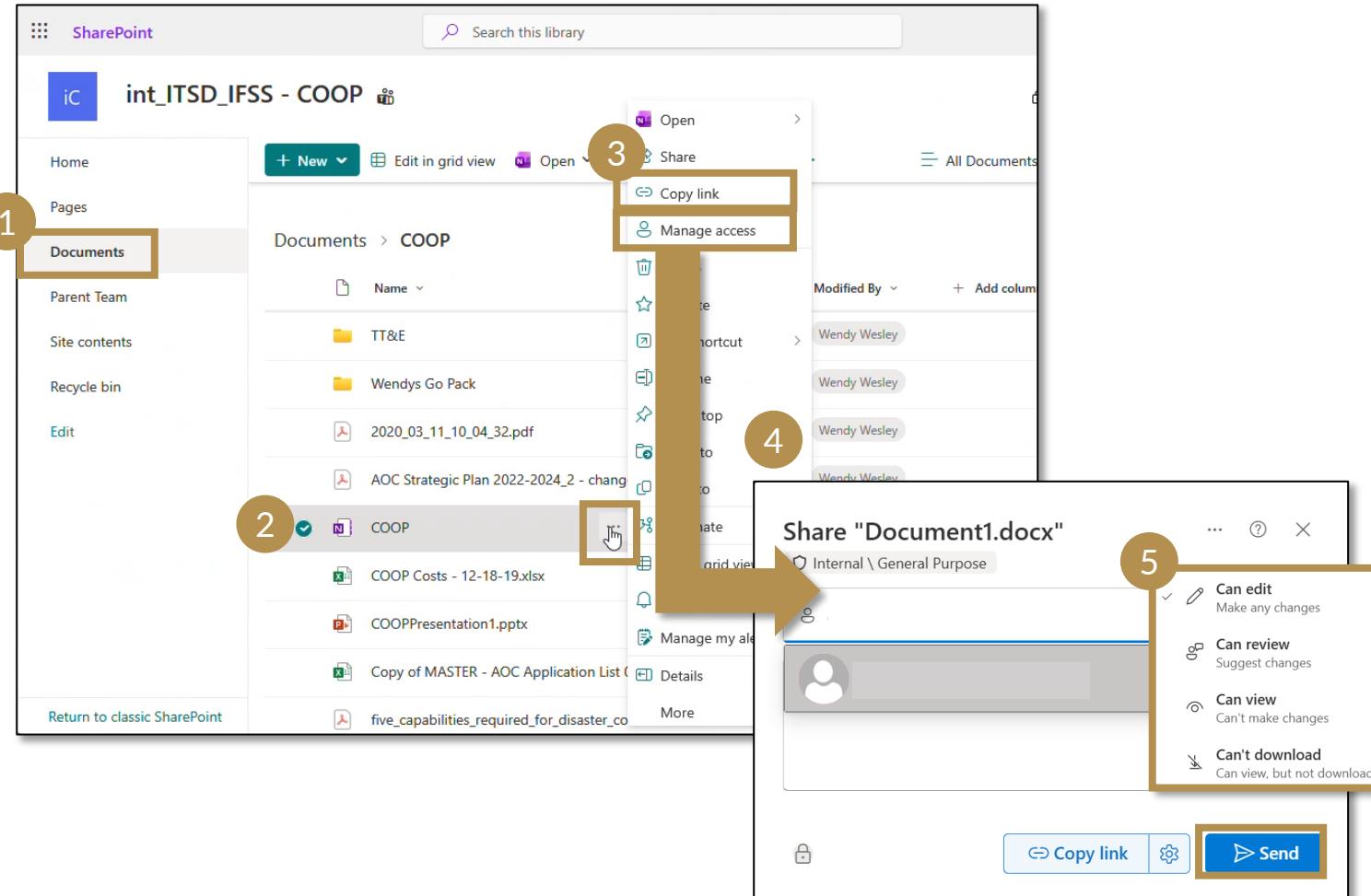
1. From the Tool Bar list, choose **Documents**.

2. Hover over a file and select the **ellipses** to view more options.

3. Use **Copy** link to send a *pointer* to another user.

4. Use **Manage access** if a user needs edit access.

5. Add the name of the user and adjust the **Can edit** settings as needed, then click **Send**.
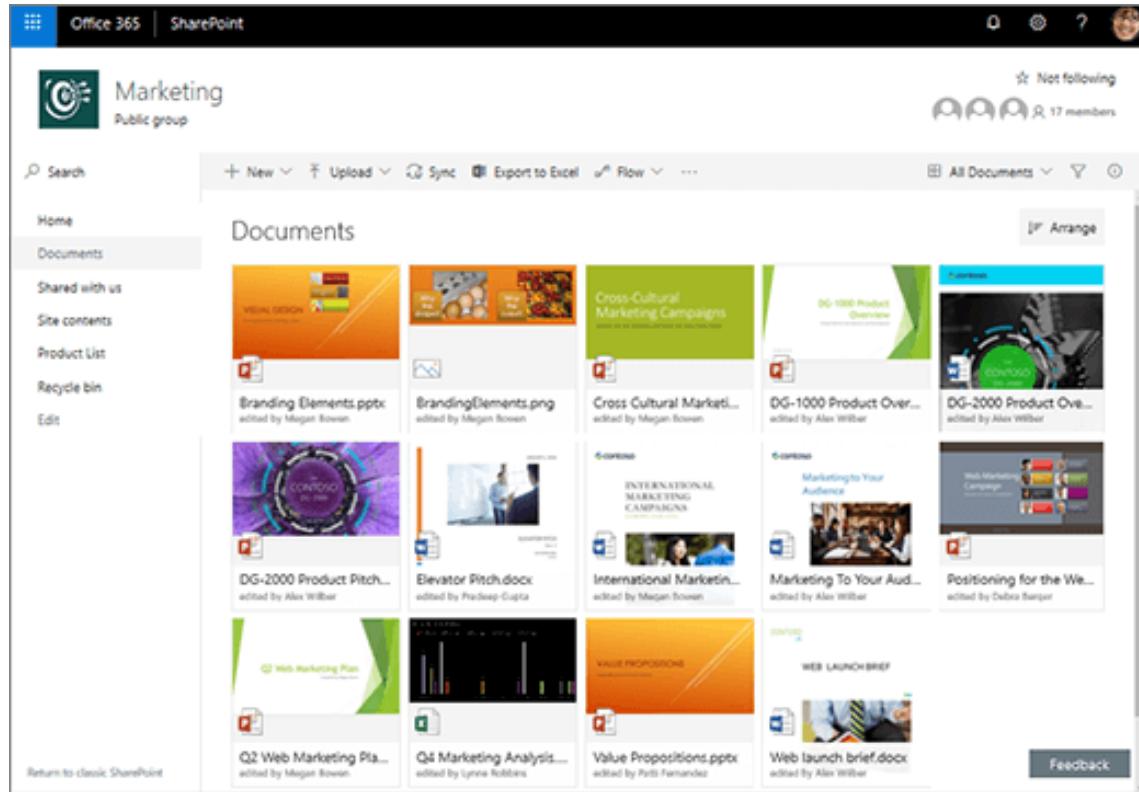
The screenshots provided reflect a test environment. Your experience may vary.

Document Libraries

The screenshots provided reflect a test environment. Your experience may vary.

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

Learn more

Create a Document Library
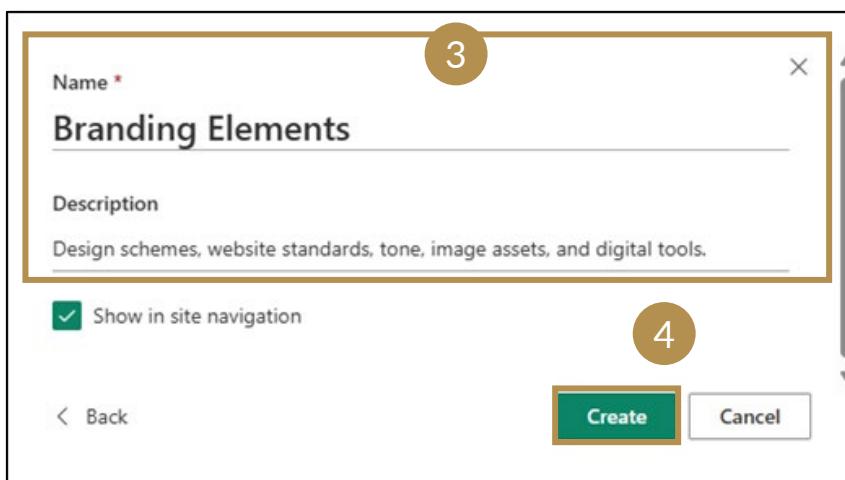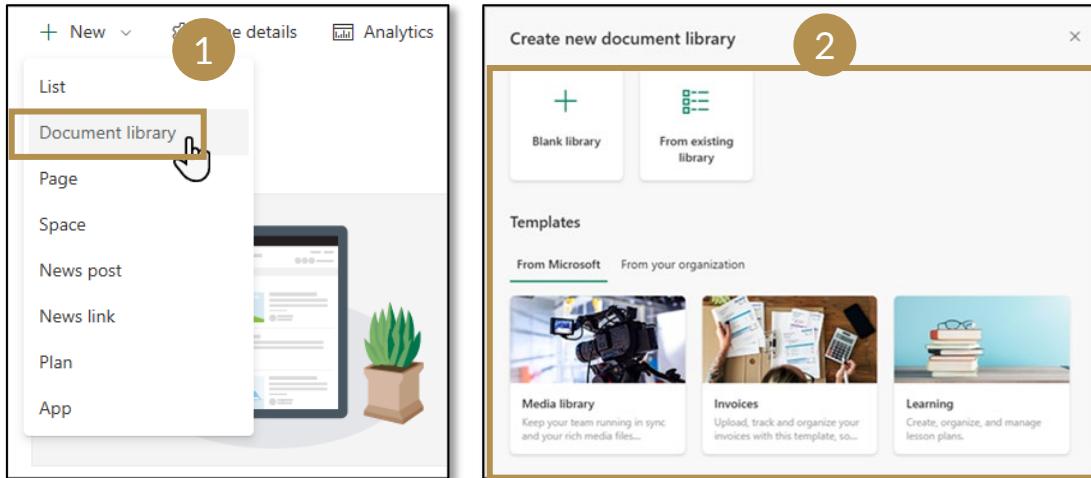
1. Navigate to the site you wish to create a document library within. Click **New** > **Document Library**.

2. Select the **library type**.

3. Enter **Name** and **Description**.

4. 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
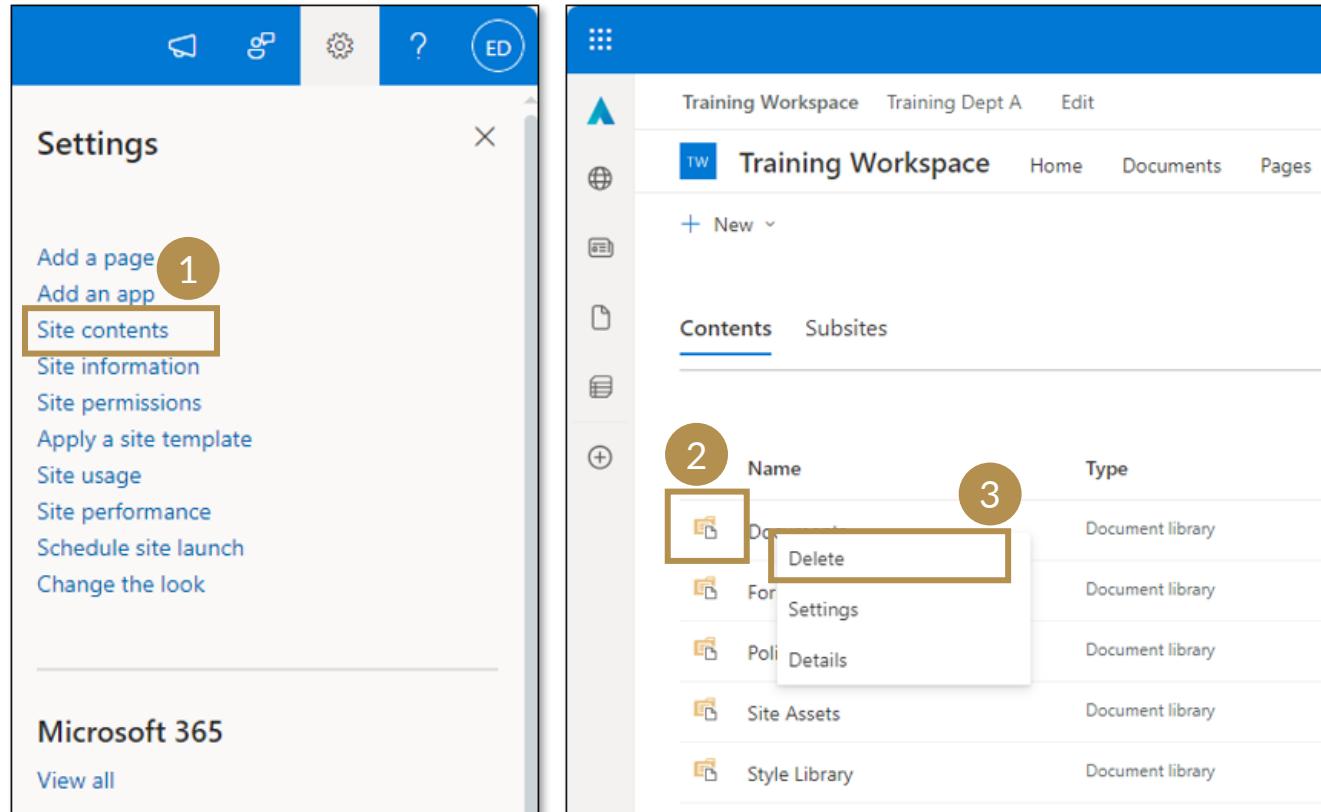
1. Click the **Settings icon**, then select **Site Contents**.

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

3. Select **Delete**.

The screenshots provided reflect a test environment. Your experience may vary.

Lesson 6

Appendix

- SharePoint Key Terms
- Site Settings
- Formatting Tips

SharePoint Key Terms

Option	Description
Content Owner	• User with edit permissions to a site. Responsible for managing and maintaining content within a site. Content creation, editing and organizing content, consistent updates with relevant content.
Discard changes	• This option reverts the page back to its previously saved version, cancelling any changes made since the last publish or draft save.
Document Library	• Used to store and manage content. A document library is designed to store items like Word documents, Excel files, PDFs, and other items you may consider a document. Document libraries offer features like version control and metadata.
Edit (Menu)	• Allows modification of navigation on a site. Found in Site settings, or the Edit button in the navigation area.
Edit (Page)	• Allows modification of content of a specific page within a site. Found in Site Actions, or the Edit button on the page menu.
List	• A list is a collection of data to be used in managing information collaboratively. Lists keep data in a structured format and have multiple view options. Examples of lists would be: task list, calendar list, contacts list, or maybe even an issue tracking list.
Metadata	• Metadata is quite simply data about other data. Descriptive information like author, date created, or key words associated with a file. This additional information helps in categorization of the data you maintain and adds context and structure. All allowing for better filtering and sorting of content.

SharePoint Key Terms

Option	Description
Page	• A page is a single webpage within a Site. Pages are used to display content such as text, images, videos, and various other web parts. Pages inherit permissions from the site they belong to, but specific permissions can be set for individual pages.
Publish	• This option makes the page live to all site visitors. Use this option when the page is ready to be shared with your audience.
Republish	• This option saves edits to a previously published page as the next live version. Changes made will be visible to site visitors.
Save as draft	• This option saves your changes without publishing them. Only users with edit permissions (other Site Owners) can see the draft.
Section	• A section is an individual area on a site or page where you can add or organize content using web parts. Sections can be setup in different ways including one column, multiple columns, full-width sections and vertical sections.
Site	• A site is a collection of pages and resources. Sites are used to organize and manage content for various teams or departments. Within a site you can have different resources such as pages, document libraries, and lists. Sites have their own set of permissions controlled by the site owner.
Site Owner	• Owns and has full control over a SharePoint site. Responsible for configuration of the site, can grant permissions to the site, ensures governance policies are adhered to, and oversees content of the site.
Site Visitor	• Site visitors have read-access permissions to all global-facing sites and libraries. These users have no permission to edit a site in any way.

Site Settings

Option	Description
Add a page	• Add a page to the current site.
Add an app	• This feature is not enabled for Site and Content Owners.
Site contents	• Access the site contents including libraries, lists and pages.
Site information	• Change information such as title, description, etc.
Site permissions	• Manage site permissions.
Apply a site template	• Site Owners only, in collaboration with SharePoint Admins.
Site usage	• View hub and site usage information.
Site performance	• Provides access to the Page Diagnostics tool.
Schedule site launch	• Site Owners only, in collaboration with SharePoint Admins.
Change the look	• Change the theme, header, navigation and footer.

Currently, TN Courts has not implemented custom SharePoint Page Templates.
Only Microsoft templates are available for use when creating new SharePoint pages.

Formatting Tips

Option	Description
Fonts/Sizes	• Fonts, colors, and sizes are included in the templates. • Duplicate a text web part from the template being used to ensure proper font, colors, and sizes are used. • Heading 1 is used for top headings. • Heading 2 should be used for section. • Heading 3 should be used for sub-headings. • Don't change or alter fonts globally or within the template itself.
Image sizing and quality	• Use aspect ratios of 16:9 or 4:3, depending on the layout to ensure proper scaling between devices or screen sizes. • When adding an image to a page title area or web part, it is best to set a focal point in the area of the image that you want to always display. This ensures that the chosen area is shown on any screen size and device. • Images spanning the width of a column should be at least as wide as the column in which they are placed to avoid distortion. • Do not change site logos unless notified of a change by the corporate communications team and governance committee.

Formatting Tips

Option	Description
Layout Best Practices	• Web parts should not be rearranged from a given template to ensure consistency and reduce cognitive load on the end user. • When an additional web part is needed, use best practices for creating a seamless user experience. • Adhere to the templates as much as possible, but it is okay to remove a web part in your new page if it does not suit your needs.
Webparts using Free Text	• Use headings to logically markup content sections. • Only use bold, italicizing, and underlining sparingly for impact. • Text color (only dark green) should be used sparingly. • Do not highlight text with a background color. • Avoid the use of center, right, or full width text justification. • Specific fonts cannot be selected, which is a limitation of Modern SharePoint.

Quick Recap

- SharePoint Access and Roles

- SharePoint Site Overview

- News Posts and News Web Parts

- Create and Maintain Pages

- Page Details, File Access, and Document Libraries

- SharePoint Key Terms

- Site Settings

QUESTIONS?

THANK YOU