

M365 SharePoint User Overview



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.

Accessing SharePoint

Access SharePoint via a Browser or 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.

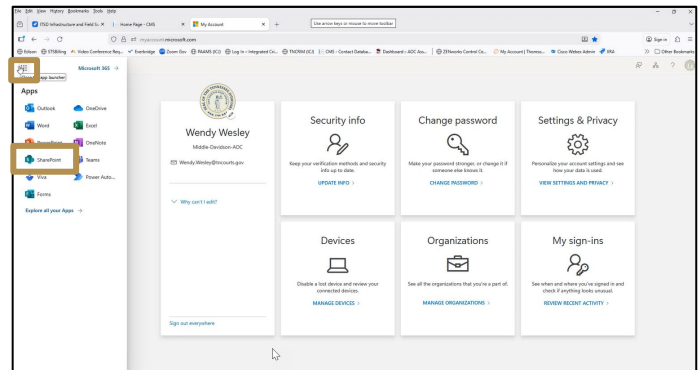
Access SharePoint via Microsoft Teams. Go to a Team → click on the Files tab.

- 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.

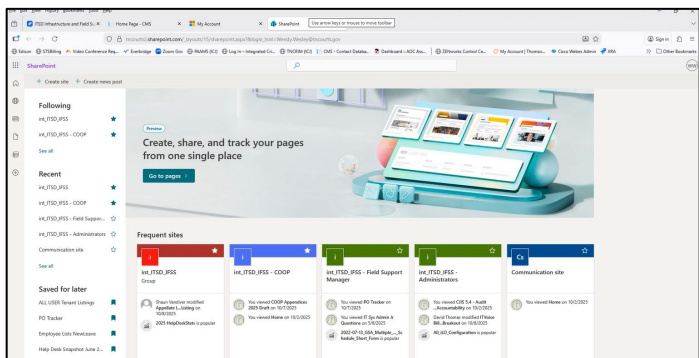
Access SharePoint on the Web

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

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



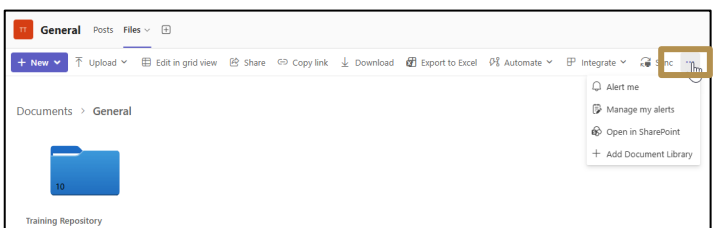
- Your **SharePoint** site displays.



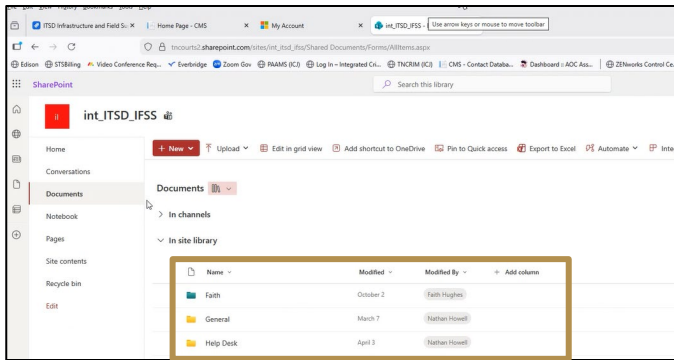
Access SharePoint from a Teams Channel

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

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



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

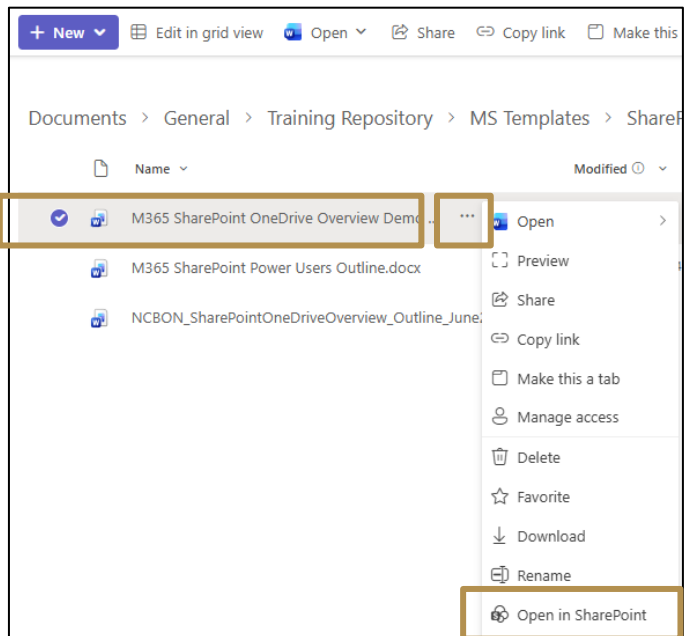


- A new browser window or tab opens taking you to the SharePoint site associated with the selected team.
- Here, you can access advanced features, organize documents, or use SharePoint lists and libraries.

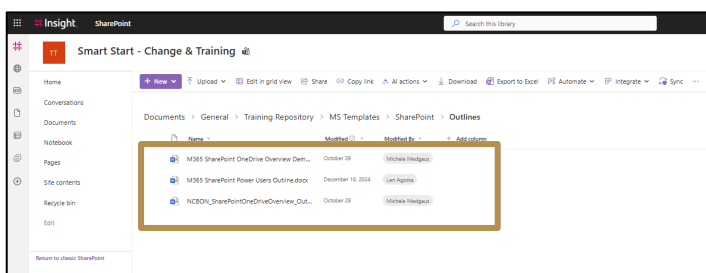
Access SharePoint from a File in Teams

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.

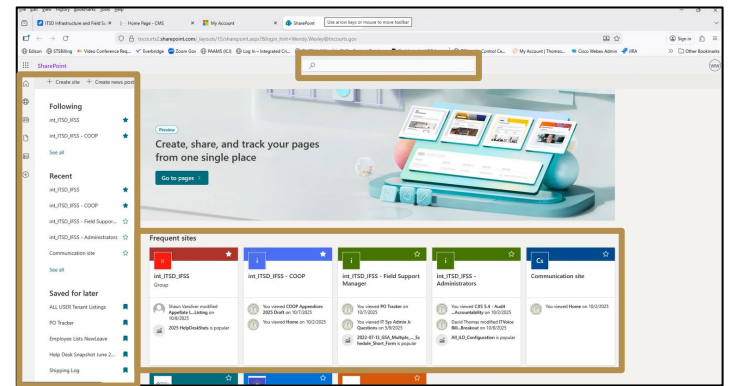


3. This action launches your web browser and takes you directly to the SharePoint document library where the file is stored.



SharePoint Home Page Layout

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



Following

- **Purpose:** Displays all the SharePoint sites you've chosen to follow (e.g., your team site or project sites).
- **How to Follow:** Click the **star icon** on a site's info card or page. Once followed, the site appears in this section.
- **Manage:** To unfollow, click the filled-in star again. You can also select **See all** to view the complete list of followed sites.

Recent

- **Purpose:** Shows sites you've visited most recently.
- **Behavior:** Updates automatically based on your activity. Useful for quick access to sites you've just worked on.
- **Expand:** Click **See all** to view more recent sites

Saved for Later

- **Purpose:** Lists news posts or pages you've flagged to read later.
- **How to Save:** Use the Save for later flag at the bottom of a news post or page.
- **Manage:** Remove saved items by clicking the filled-in flag again. You can also view all saved items via **See all**

Frequent Sites

- **Purpose:** Displays sites you visit often, based on your usage patterns.
- **Powered by:** Microsoft Graph (must be enabled by your admin).
- **Note:** This list is dynamic and cannot be manually edited by users or admins

Other Key Elements

- **Search Bar:** At the top, lets you search across all SharePoint sites, files, and people in your organization.
- **News Feed:** Displays updates from sites you follow or visit frequently.
- **Create Options:** If enabled, you can create new sites or news posts directly from the start page

Suggested Sites

- **Purpose:** Recommendations based on your recent searches and organizational activity.
- **Behavior:** Appears automatically if Microsoft Graph is enabled

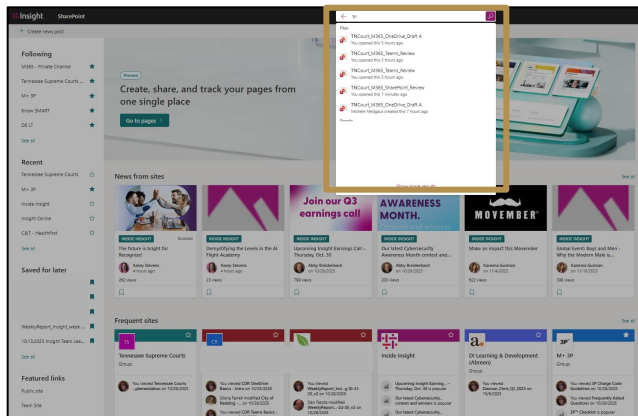
Featured Links

- **Purpose:** Links spotlighted by your organization for quick access to important resources or portals

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).



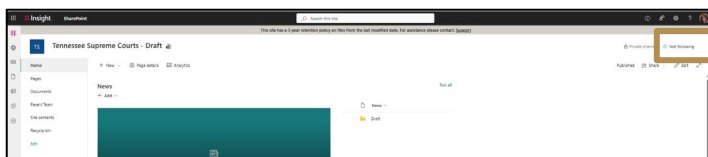
2. Press **Enter** or click the **Search** icon. SharePoint displays list of search results that match your query.

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

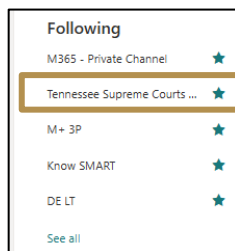
Follow a Site

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**

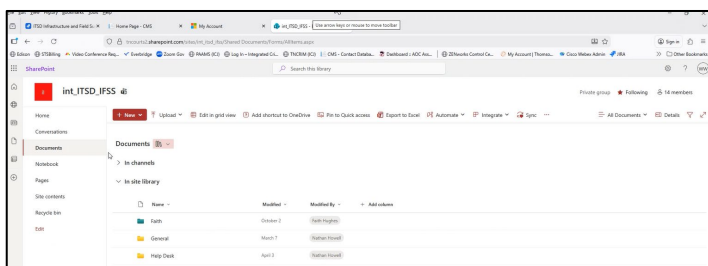


2. The status changes to **Following**.
3. When you follow a site, it appears under Following on the SharePoint homepage, allowing you quick and easy access to it from your SharePoint homepage.



Document Management

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

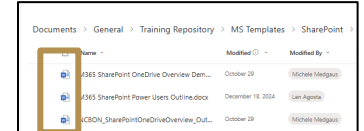
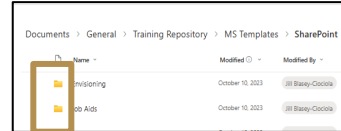


View a Folder or a File

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.



Create a New Folder or File on SharePoint

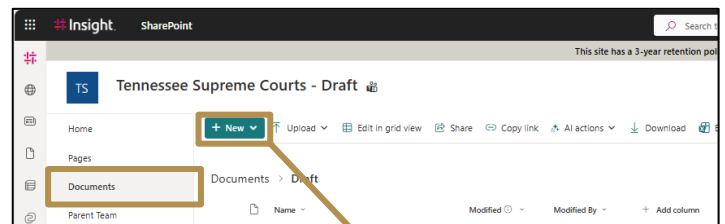
To create new files or folders directly in SharePoint, start by navigating to your desired document library within the SharePoint site.

To create a folder:

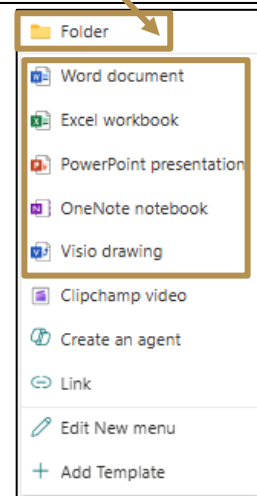
- Click the **+ New** drop-down.
- Select **New Folder**.
- Name the folder and select a color.

To create a file:

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



File Types

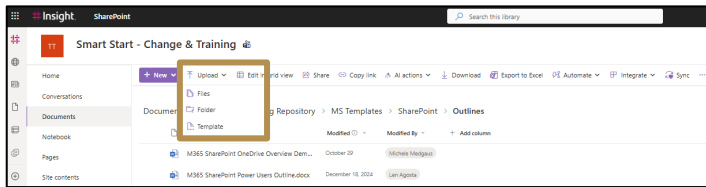


When you create a new file or folder in a SharePoint document library that is connected to a Microsoft Teams site, the item is automatically available within the corresponding Teams channel's Files tab.

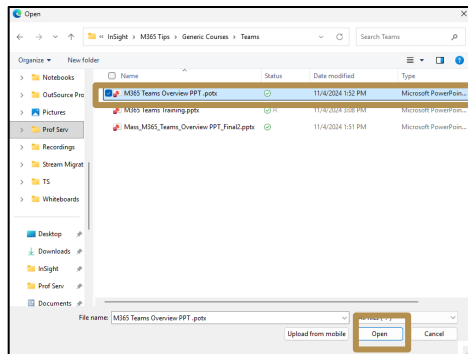
Upload a File

To upload a file or folder:

1. Click the **Upload** drop-down arrow.
2. Select **Files** or **Folders**.



3. Select the file or folder from OneDrive.
4. Click **Open**.



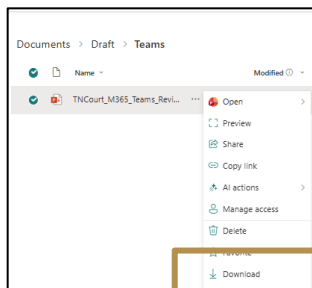
Dragging and Dropping Files

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.

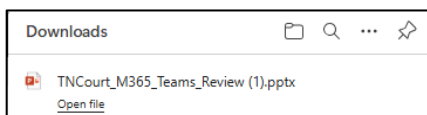
1. Open OneDrive on your computer.
2. Select the files or folders you want to upload.
3. Drag them directly into the SharePoint document library window in your browser.
4. The files will upload and appear in the library.
5. This method works for both individual files and entire folders

Download SharePoint Files

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.

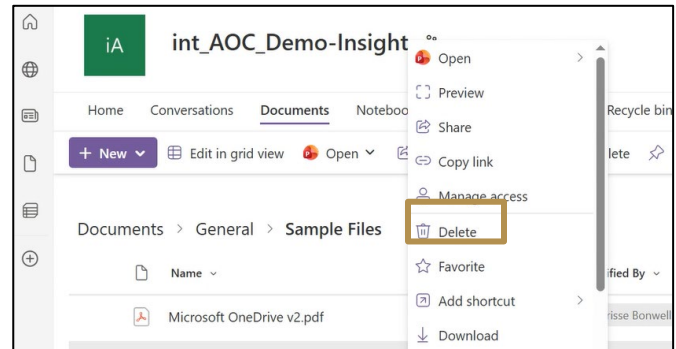


From the Downloads folder you can move the file to any OneDrive location, and it will sync to the cloud.

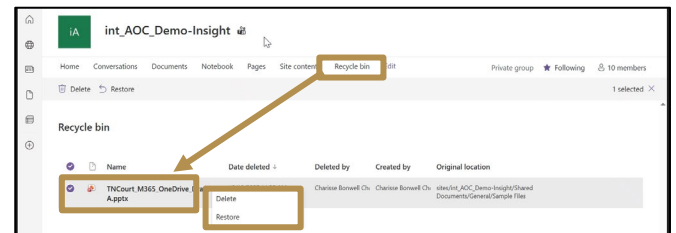
Remove a File

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.

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**.



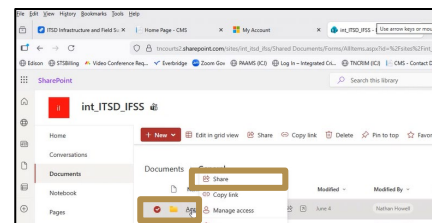
If you need to recover the file, you can right-click and restore it from the **Recycle Bin** if it has not been permanently removed.



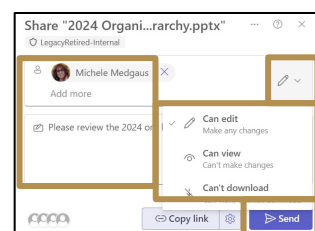
Sharing Files from SharePoint

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)** icon next to the file and select **Share** from the menu.

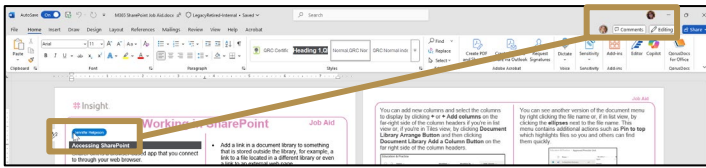


2. Enter the name of the person you want share the file with.
3. Enter a message, if necessary.
4. Click **Edit** to change the sharing permissions.
5. Click **Send**.



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.

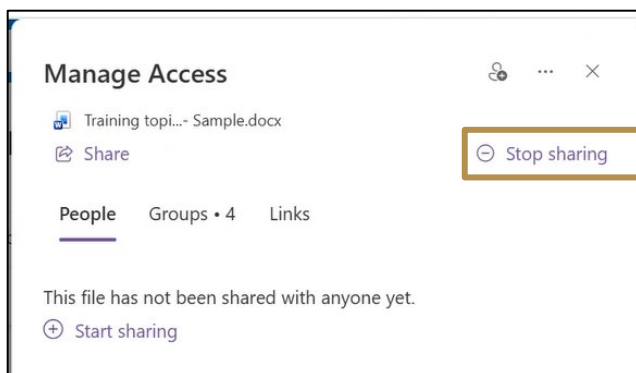


- Visual cues that show who else is currently viewing or editing a document alongside are called **Presence indicators**.
- These indicators help coordinate edits and prevent accidental overwrite, as you can see exactly where others are working and communicate within the document if needed.

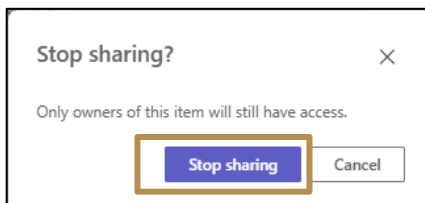
Manage Access

Changes made to permissions 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**.



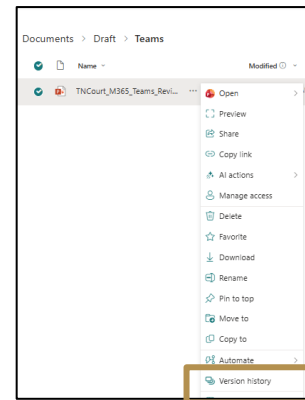
- A confirmation message displays, click on **Stop sharing**.



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.

- Find the file you want to open in **SharePoint**.
- 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.
- 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.

- Most recent version displays at the top.
- Hover your mouse over the file version you wish to review and click the dropdown arrow to show the available actions.

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

- 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

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