

SharePoint Site Owner

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Agenda for SharePoint in Microsoft 365 Training

- 01** Introduction to SharePoint in Microsoft 365

- 02** Creating and Setting Up a SharePoint Site in SharePoint

- 03** Managing People and Permissions

- 04** Document Libraries and Content Organisation

- 05** Working with Metadata and Lists

- 06** Pages and Other SharePoint Components

- 07** Collaboration and Day-to-Day Use

- 08** Governance and Best Practices

Timings



09:00 – 3:30



BREAK 10:30



LUNCH 12:30



BREAK 2:30



Course Requirements

SharePoint Access

You need your own SharePoint Environment or be able to access my SharePoint environment to participate in the course and access course materials.

Site Link and Credentials

Use the provided link to access the site, and login with your Username and Password to get started.

SharePoint vs OneDrive vs Teams

Understanding the "Me, We, Us" of Microsoft 365.



OneDrive

ME (PERSONAL)

Purpose

Private workspace for individual files and drafts.

Best For

Drafting documents before they are ready to be shared with the team.

Ownership

Owned by **you**. Access is private unless manually shared.



Teams

WE (COLLABORATION)

Purpose

Real-time collaboration, chat, and project coordination.

Best For

Active projects, daily communication, and co-authoring files.

Ownership

Owned by the **Team**. Files are stored in a connected SharePoint site.



SharePoint

US (ORGANIZATION)

Purpose

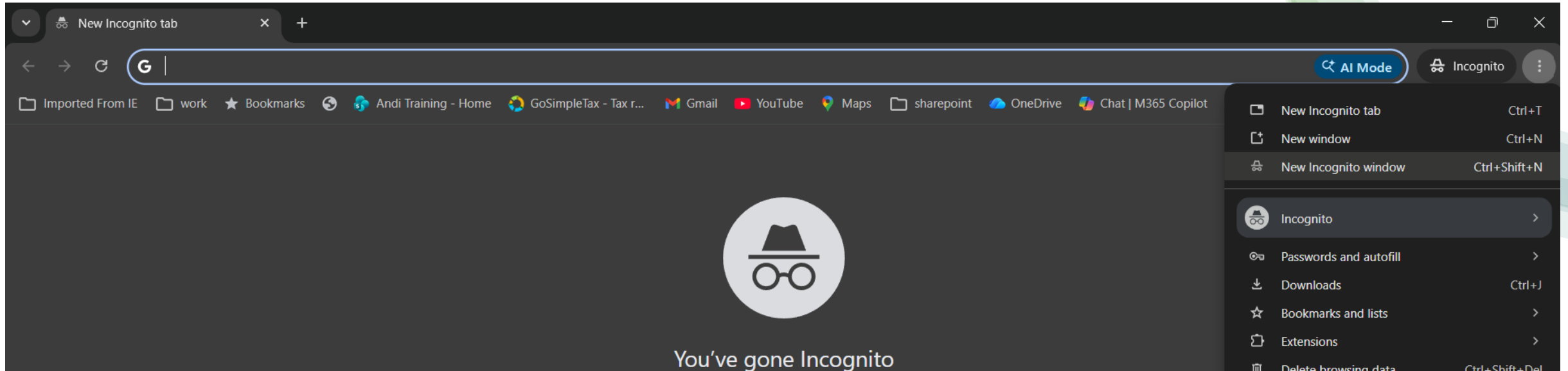
Intranet, content management, and structured knowledge.

Best For

Publishing news, policies, and storing long-term departmental records.

Ownership

Owned by **Site Owners**. Permissions are granular and structured.



Accessing SharePoint via my environment

Get an Incognito or InPrivate Browser page

Go to office.com

Enter your username and password

e.g. student1@acatalyst.onmicrosoft.com

Password – ShareP01nt

Accessing SharePoint

m365.cloud.microsoft/apps?auth=2&origindomain=Office&client-request-id=1b62b6f1-c09c-49b4-b019-d7aeb8e16ab8

Imported From IE work Bookmarks Andi Training - Home GoSimpleTax - Tax r... Gmail YouTube Maps sharepoint OneDrive Chat | M365 Copilot All Bookmarks

Install apps

Apps

- Outlook**
Email, schedule, and set tasks.
- Word**
- Excel**
- PowerPoint**
- OneNote**
- OneDrive**
- Teams**
- SharePoint** ...
link, More options in context menu
- Clipchamp**

All apps →

Use across Teams, Outlook, and Microsoft 365 Copilot

- Bookings**
- Org Explorer**
- Power BI**
- Trello for Teams**

Get work done

Other Apps

Researcher
Analyst
Sir Trains a Lot
Microsoft 365 Admin
New agent
All agents
Notebooks
AI
All notebooks
Chats
Outlook Mail Groups in Teams ...
SharePoint Metadata Autofill ...
SharePoint Document Library I...
Creating AI Agent Demo in Sh...

Apps

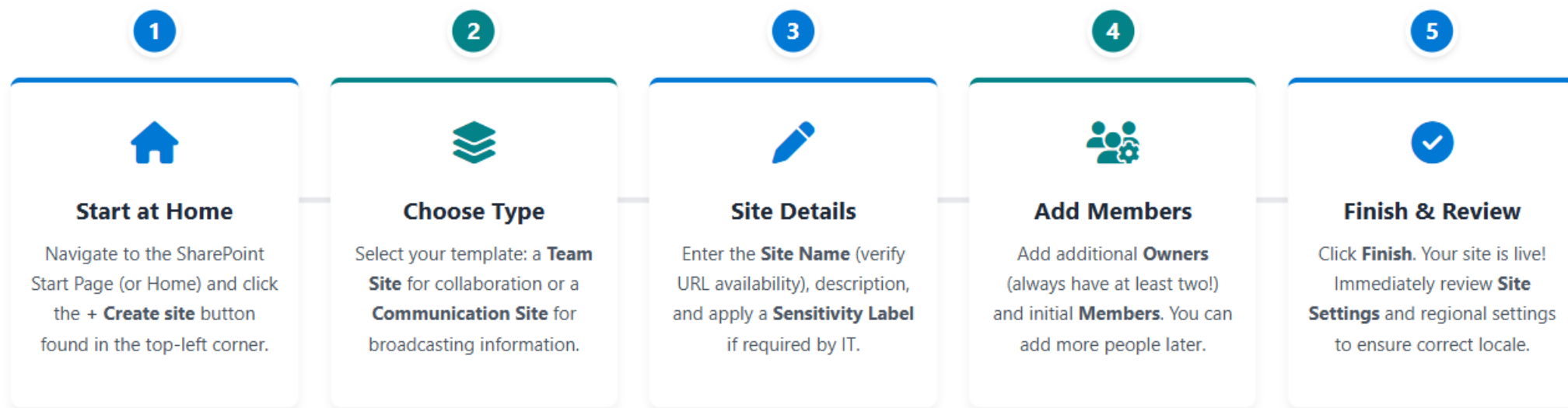


Before You Create a Site

- Define the site's purpose and target audience
- Choose your site type: Team Site or Communication Site
- Plan your site structure and navigation
- Decide on permissions and access levels
- Consider your content and document organisation
- Check your organisation's governance policies

Create a New Site - Step by Step

Follow this standard process to launch your new SharePoint workspace.



Pro Tip: "Create Site" Button Missing?

If you don't see the "+ Create site" button, your organization may have restricted self-service site creation. You might need to submit a request through your IT helpdesk instead.

Demo Adding a new Team Site

- SharePoint
 - New Site
 - Add Name
 - Privacy settings
 - Language
 - Add members
- Teams
 - Create new team
 - SharePoint site created automatically
- Creating a SharePoint site gives you a document & information site first.
 - Creating a Team in Microsoft Teams gives you a collaboration space first — and a SharePoint site is automatically created in the background to store the files.
 - Adding a Team to an existing SharePoint site is a way of layering chat and meetings on top of a site you already have.



Microsoft 365 Groups – What Gets Created?

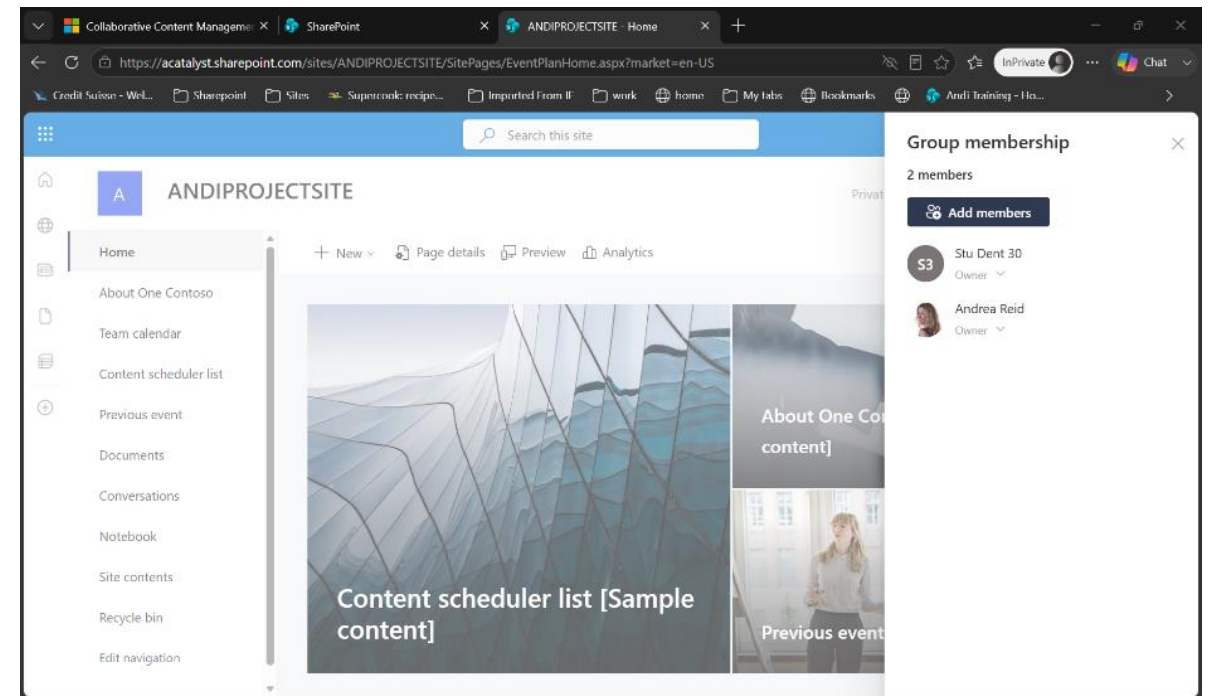
When you create a Team Site, a Microsoft 365 Group is automatically created behind the scenes. This group connects several services together:

- **SharePoint Team Site** – your document libraries, pages, and lists
- **Outlook Group Mailbox** – a shared inbox for group conversations
- **Shared Calendar** – a group calendar visible to all members
- **Planner Board** – a task management board for the group
- **OneNote Notebook** – a shared notebook for meeting notes and ideas

Owners and Members you add to the site are automatically added to the Microsoft 365 Group – giving them access to all of the above.

Communication Sites do not create a Microsoft 365 Group – permissions are managed separately through SharePoint.

- **Exercise 1**
- Open the Exercises workbook
- Pick one of the sites based on the options given or you can create your own
- Add yourself as a site owner
- Add Andrea@acatalyst.onmicrosoft.com as a site owner

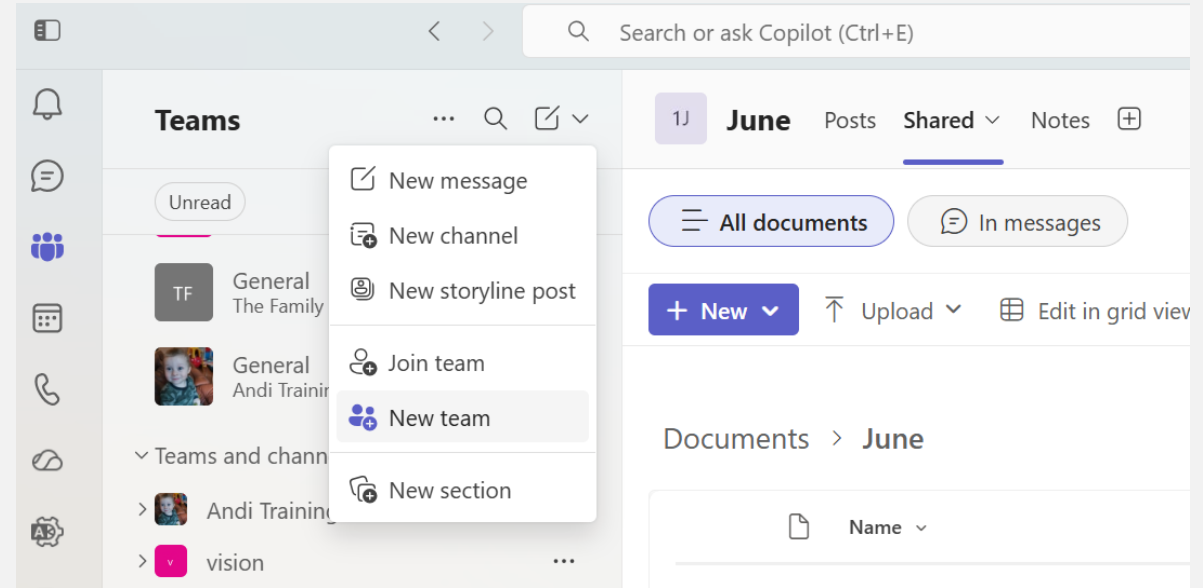


What Microsoft Teams Is Used For

Chat	Chat with colleagues one-to-one or in group conversations
Host	Host online meetings, video calls, and webinars
Share	Share and co-edit files with your team in one place
Organise	Organise work by team and channel for different projects or topics
Bring	Bring everyday tools together — calendar, tasks, notes, and apps
Connect	Connect with people outside your organisation as guests



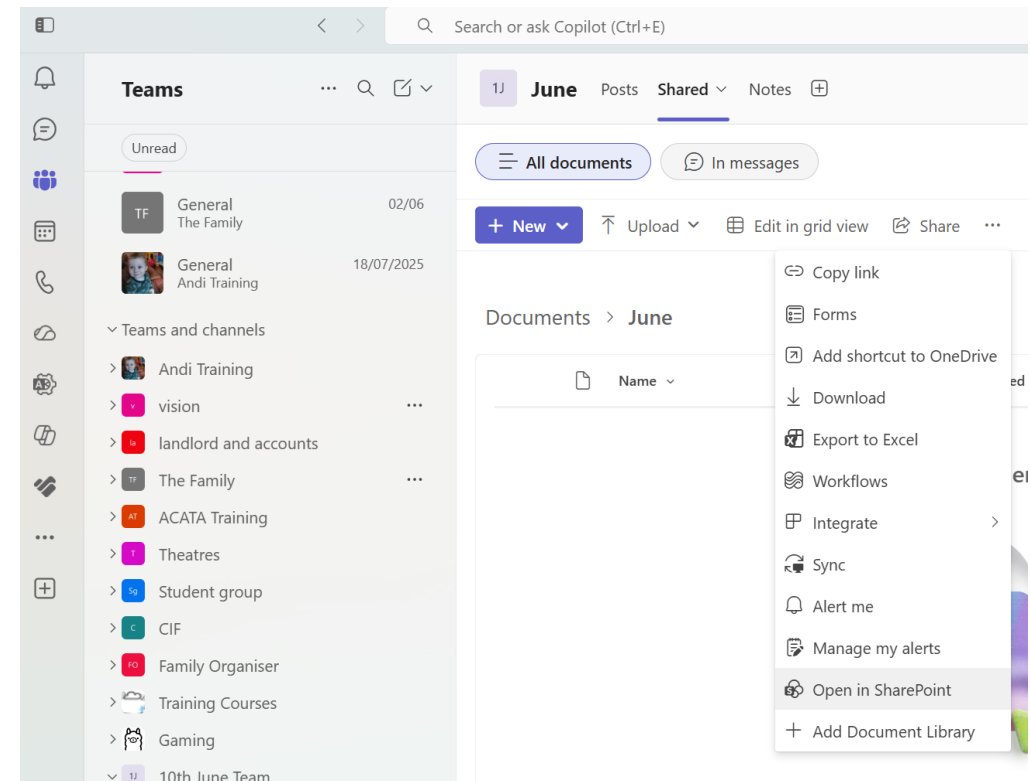
How to Create a Microsoft Team



-
- Open Microsoft Teams and select the Teams tab on the left
 - Click “Join or create a team”, then choose “Create team”
 - Pick “From scratch” or start from an existing team or group
 - Choose privacy: Private, Public, or Org-wide
 - Give the team a clear name and short description, then click Create
 - Add members and owners, then start adding channels for your topics


How a SharePoint Site Is Created with a Team

- Creating a team in Microsoft Teams automatically provisions a SharePoint site in the background
- A Microsoft 365 Group is created first, linking Teams, SharePoint, Outlook, and Planner
- The new SharePoint site becomes the storage layer for the team's files and pages
- The Files tab in each channel maps directly to a folder in the SharePoint document library
- Team owners and members are mirrored as SharePoint site owners and members
- You can open the SharePoint site any time from the channel's Files tab → Open in SharePoint



Owners, Members, and Visitors

The three primary SharePoint groups and their capabilities.




Site Owners

Full Control

"The Administrators"

- ✓ Change site look, feel, and navigation
- ✓ Manage permissions and add/remove users
- ✓ Create and delete lists, libraries, and sub-sites
- ✓ Access all content, even private drafts

Typical Users:
Team Leads, Project Managers, IT Admins




Site Members

Edit

"The Collaborators"

- ✓ Add, edit, and delete documents and list items
- ✓ Create and edit pages and news posts
- ✓ Share files with others (if allowed)
- ✗ Cannot change site settings or navigation

Typical Users:
Team Members, Project Staff, Contributors



Site Visitors

Read

"The Audience"

- ✓ View pages, documents, and list items
- ✓ Download files (unless restricted)
- ✗ Cannot edit, delete, or upload content
- ✗ Cannot see drafts or minor versions

Typical Users:
Stakeholders, Leadership, External Guests

Permission Levels Explained

Understanding access levels and governance best practices.



Standard Levels

Default roles in SharePoint



Read

Users can view pages and documents and download items. They cannot make changes.



Contribute

Standard for older sites. Can view, add, update, and delete list items and documents.



Edit

Default for Members. Can add, edit, and delete lists; can view, add, update, and delete list items and documents.



Full Control

Owners only. Full administration: create sub-sites, manage permissions, and change site settings.



Best Practices

Governance & Security



Grant to Groups, Not Users

Assign permissions to Microsoft 365 Groups or SharePoint Groups. It makes adding/removing people much easier later.



Avoid Breaking Inheritance

Try to keep permissions consistent. Breaking inheritance (unique permissions) at the file level creates a maintenance nightmare.



Principle of Least Privilege

Give users the lowest permission level needed to do their job (e.g., Read instead of Edit) to prevent accidental deletions.



Sharing vs. Permissions

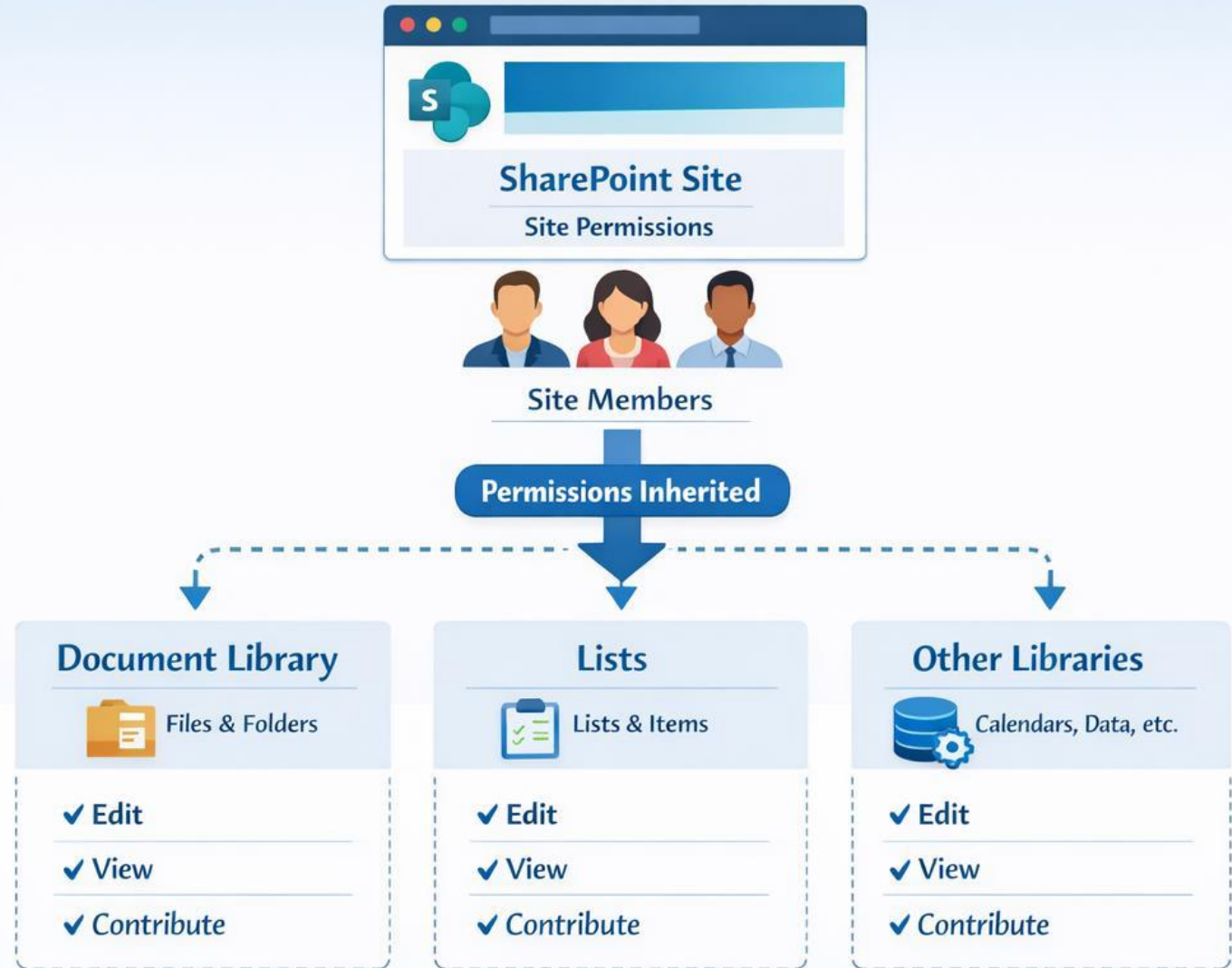
Use "Share" for temporary or one-off access to specific files. Use Group membership for long-term team access.

Permission Levels Explained

Understanding access levels and governance best practices.

- Permissions get inherited from the site level down
- You can Break inheritance at any level to reduce permissions or add additional permissions
- As a site owner you then have to manage these permissions

SharePoint Permission Inheritance





Reviewing SharePoint Permissions

Site Permissions Levels

Understand default groups: Owners have full control, Members can edit, Visitors have read-only access. Confirm group memberships via Admin Center.

Checking Custom Permissions

Identify unique access by reviewing permissions for specific groups, checking for custom settings, and breaking inheritance as needed.

Library and User Access

Verify library permissions and user access levels through advanced settings, and ensure permissions align with site and team configurations.

Checking Permissions

SharePoint

BROWSE PERMISSIONS

Grant Permissions Create Group Edit User Permissions Remove User Permissions Check Permissions Access Request Settings Site Collection Administrators

Grant Modify Check Manage

Home

Notebook

Course Content

Trainers

Courses

Event Tracker

Expense Tracker

Policies

Event Feedback

Recycle Bin

EDIT LINKS

Some content on this site has different permissions from what you see here. [Show these items.](#)
There are limited access users on this site. Users may have limited access if an item or document under the site has been shared with them. [Show users.](#)

Name	Type	Permission Levels
<input type="checkbox"/> Name	SharePoint Group	Edit
<input type="checkbox"/> ACATA Training Members	SharePoint Group	Full Control
<input type="checkbox"/> ACATA Training Owners	SharePoint Group	Full Control
<input type="checkbox"/> ACATA Training Visitors	SharePoint Group	Read

Spot inheritance issues quickly (mental checklist)

- Use this quick rule of thumb:
- **No issues:**
 - Only 3 default groups
 - Libraries inherit permissions
- **Red flags:**
 - Extra groups
 - Libraries with their own permissions
 - “Stop inheriting permissions” used
- Broken inheritance = **unique permissions exist somewhere**

Check a specific user

- Really useful for troubleshooting:
- **Steps:**
 - Go to **Advanced permission settings**
 - Click **Check Permissions**
 - Enter their name/email
 - Shows exactly *why* they have access

Exercise 2

- Using the site you created in exercise 1
 - Set up access for the following users
- **Members (Edit access):**
- Thurza@acatalyst.onmicrosoft.com
- Helen@acatalyst.onmicrosoft.com
- **Visitor (Read-only access):**
- Emma@acatalyst.onmicrosoft.com
- The exercise book will guide you through the steps



Adding External Users: What's the Difference?

1. SharePoint

(Advanced Permissions)

- **Best for:** Controlled file access
- **What they get:**
 - Access to **files only**
- Assigned via:
 - Owners (Full Control)
 - Members (Edit)
 - Visitors (Read)
- **Key behaviour:**
- Can add:
 - Directly OR via groups
- Permissions can be:
 - Broken at library/folder level
- **Watch out**
- ❌ No Teams/chat access
- ⚠️ Hidden permissions (inheritance)
- 🚫 Direct permissions = governance risk

2. Teams

(Guest Access)

- **Best for:** Full collaboration
- **What they get:**
 - Added as a **Guest**
- Access to:
 - Teams conversations
 - SharePoint files
 - Planner / Group resources
- **Key behaviour:**
- Access controlled by **M365 Group**
- Automatically flows to SharePoint
- **Watch out**
- ⚠️ Access to **ALL standard channels**
- ⚠️ Harder to restrict files

3. Shared Channels

(External access without adding to Team)

- **Best for:** Controlled collaboration across orgs
- **What they get:**
 - Access to **ONE channel only**
- Can:
 - Chat
 - Access files in that channel
- **Key behaviour:**
- No full Team membership
- No tenant switching (better experience)
- **Watch out** ⚠️
- ⚠️ Requires admin setup (cross-tenant)
- ❌ Issues with personal email users (e.g. Gmail)

Where to add External People



-
- “So the key question isn’t *how do I add them* — it’s **what experience do I want them to have?**”
 - Then summarise:
 - Files only → SharePoint
 - Full collaboration → Team
 - Controlled collaboration → Shared Channel

Exercise 3

You will be given 3 scenarios. For each one:

Discuss *how you would grant access* to the external person

Choose ONE option:

- **SharePoint direct sharing**
- **Add as a Guest in Teams**
- **Use a Teams Shared Channel**

Be ready to explain:

- Why your option is best
- Why you *didn't* choose the other options

Scenario 1: Ongoing Project Collaboration

Situation:

You are working on a project with an external partner for the next 3 months.

They need access to:

- Multiple files
- Conversations
- Updates from your team

Scenario 2: One-Off Document Review

Situation:

You are working on a document and need a supplier to review and make comments.

They only need access to this **one document**, and only for a short time.

Scenario 3: Working with Another Organisation's Team

Situation:

You need to collaborate with another company's team.

They already use their own Teams environment, and you want:

- Seamless collaboration
- No need for them to switch tenants/accounts
- A shared workspace between both organisations

What is a Document Library?

- A secure location on a SharePoint site where teams store, share and co-author files from any device.
- **Centralised storage** – one trusted home, replacing scattered drives.
- **Co-authoring** – real-time editing in Word, Excel and PowerPoint.
- **Version history** – automatic tracking and restore of previous versions.
- **Metadata & views** – tag files to filter, sort and group beyond folders.
- **Governance & security** – permissions, sensitivity labels and retention policies.

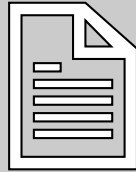




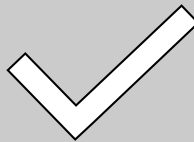
How to Create a Document Library

- Open your SharePoint site and go to the home page
- Click “+ New” in the top toolbar and choose “Document library”
- Choose “Blank library” or start from an existing library or template
- Give the library a clear name and short description, then click Create
- Decide whether to show it in the site navigation so people can find it easily
- Open the new library and start uploading files, adding columns, or creating folders

Demo



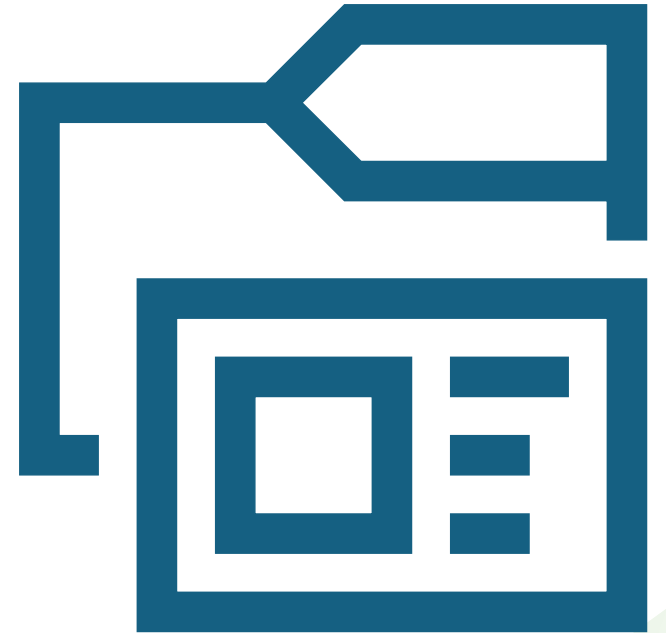
Creating a Document Library



Sharing, collaborating and
Version History

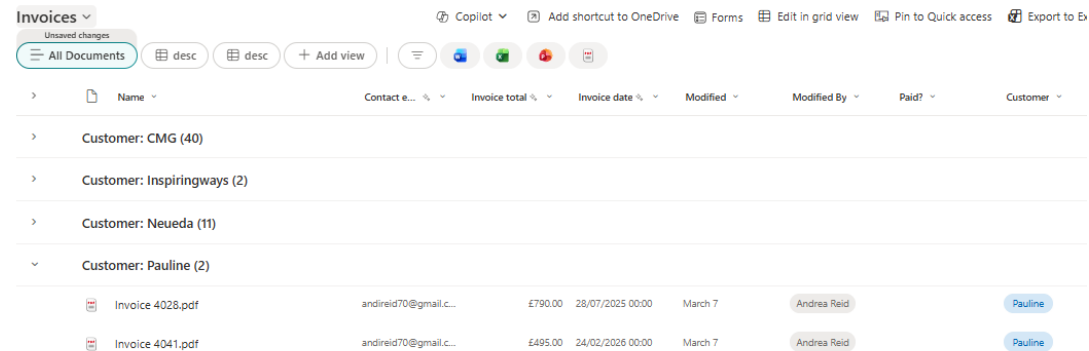
What is Metadata?

- Information about a file – not the file itself.
- Stored as columns alongside each document.
- Examples: department, project, status, owner, date.
- Makes content easier to find, filter and group.
- Powers views, search and automation.
- A flexible alternative to deep folder structures.



Find, Filter, Group with Metadata

- **Search** – metadata columns are indexed, so queries return precise results.
 - Refine by department, status or owner instead of guessing file names.
- **Filter** – narrow a library to just what matters right now.
 - Show only “In Review” documents, or files due this quarter.
- **Group** – organise files dynamically without moving them.
 - Cluster by project, region or document type in a single view.



The screenshot shows a Microsoft OneDrive library view for a folder named 'Invoices'. The interface includes a top navigation bar with options like 'Copilot', 'Add shortcut to OneDrive', 'Forms', 'Edit in grid view', 'Pin to Quick access', and 'Export to E...'. Below the navigation bar, there are buttons for 'All Documents', 'desc', '+ Add view', and a search icon. The main content area displays a table of documents, grouped by customer. The table has columns for Name, Contact e..., Invoice total, Invoice date, Modified, Modified By, Paid?, and Customer. The groups are: Customer: CMG (40), Customer: Inspiringways (2), Customer: Neueda (11), and Customer: Pauline (2). The 'Pauline' group is expanded, showing two documents: 'Invoice 4028.pdf' and 'Invoice 4041.pdf'. Each document row includes the filename, contact email, invoice total, invoice date, modified date, modified by, and a 'Paid?' status.

Name	Contact e...	Invoice total	Invoice date	Modified	Modified By	Paid?	Customer
Customer: CMG (40)							
Customer: Inspiringways (2)							
Customer: Neueda (11)							
Customer: Pauline (2)							
Invoice 4028.pdf	andireid70@gmail.c...	£790.00	28/07/2025 00:00	March 7	Andrea Reid		Pauline
Invoice 4041.pdf	andireid70@gmail.c...	£495.00	24/02/2026 00:00	March 7	Andrea Reid		Pauline

Exercise 4

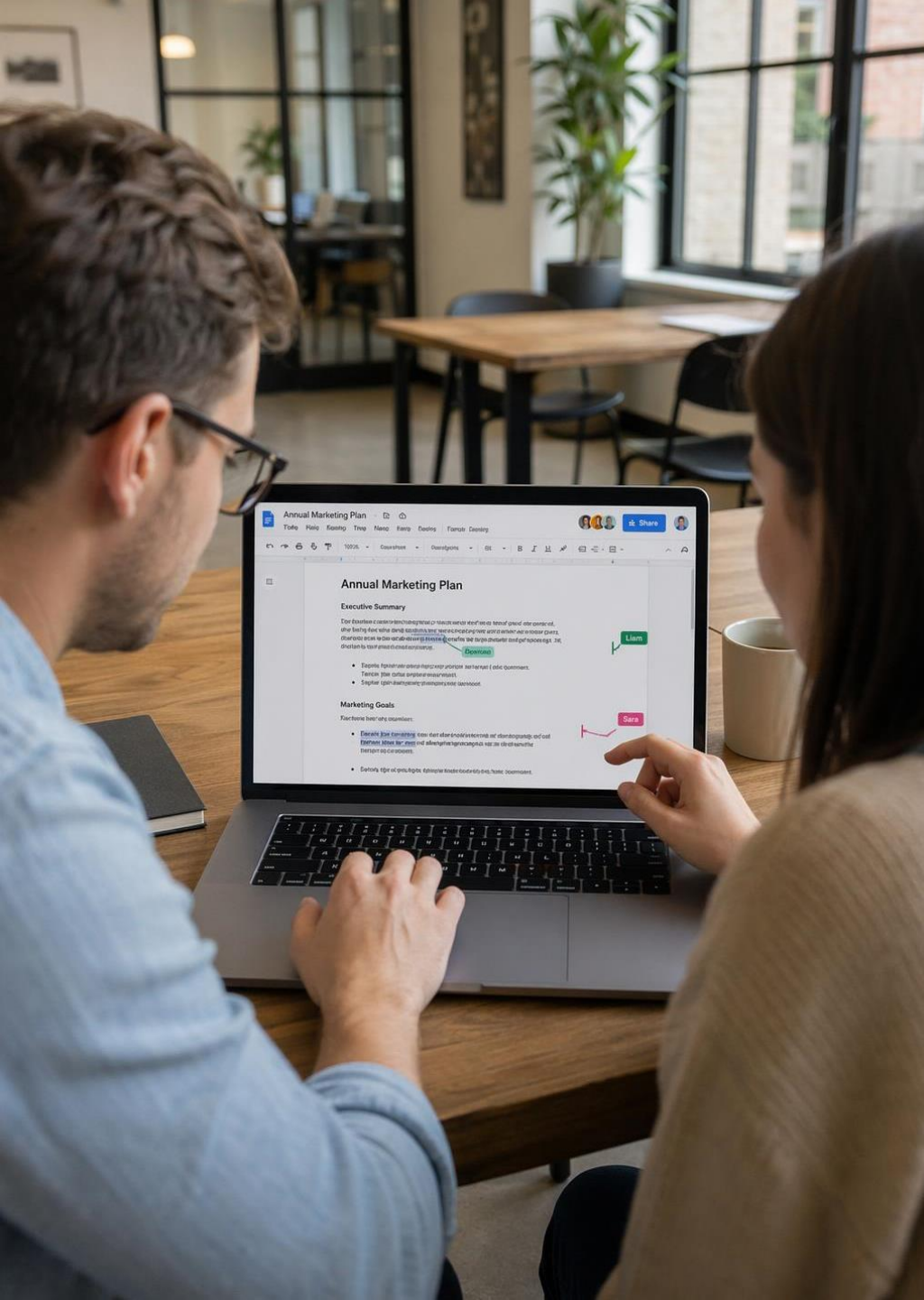
Open the Exercises workbook – it will talk you through step by step

Based on the site you have chosen from earlier

Create a new document library with customised columns

Column 1: Document Type

- **Type:** Choice
- **Choices:**
 - Planning
 - Meeting Notes
 - Report
 - Deliverable
- **Require this column:** Yes



Co-authoring Documents

- Open files directly from the library in Word, Excel, or PowerPoint on the web or desktop — no need to download
- Co-author in real time — multiple people can edit the same file at once and see each other's changes and cursors live
- AutoSave keeps everything in sync, and version history lets you restore an earlier copy if something goes wrong
- Use @mentions in comments to notify colleagues and gather quick feedback in place
- Check a file out when you need exclusive editing, then check it back in to release it
- Open the library in Teams or sync with OneDrive to co-author from the apps you already use



Sharing Documents

- Use the Share button on any file or folder to invite people, groups, or anyone with a link
- Choose View or Edit permission, add an expiry date or password, and block downloads when needed
- Copy a link or send an email invite directly from SharePoint, Teams, or any Office app
- Review and revoke who has access at any time from Manage Access on the file or folder
- Inherit permissions from the library, or break inheritance to set custom access on a specific folder or file
- Sharing activity is logged so admins can audit access and keep external sharing under control

When Sharing Breaks Inheritance

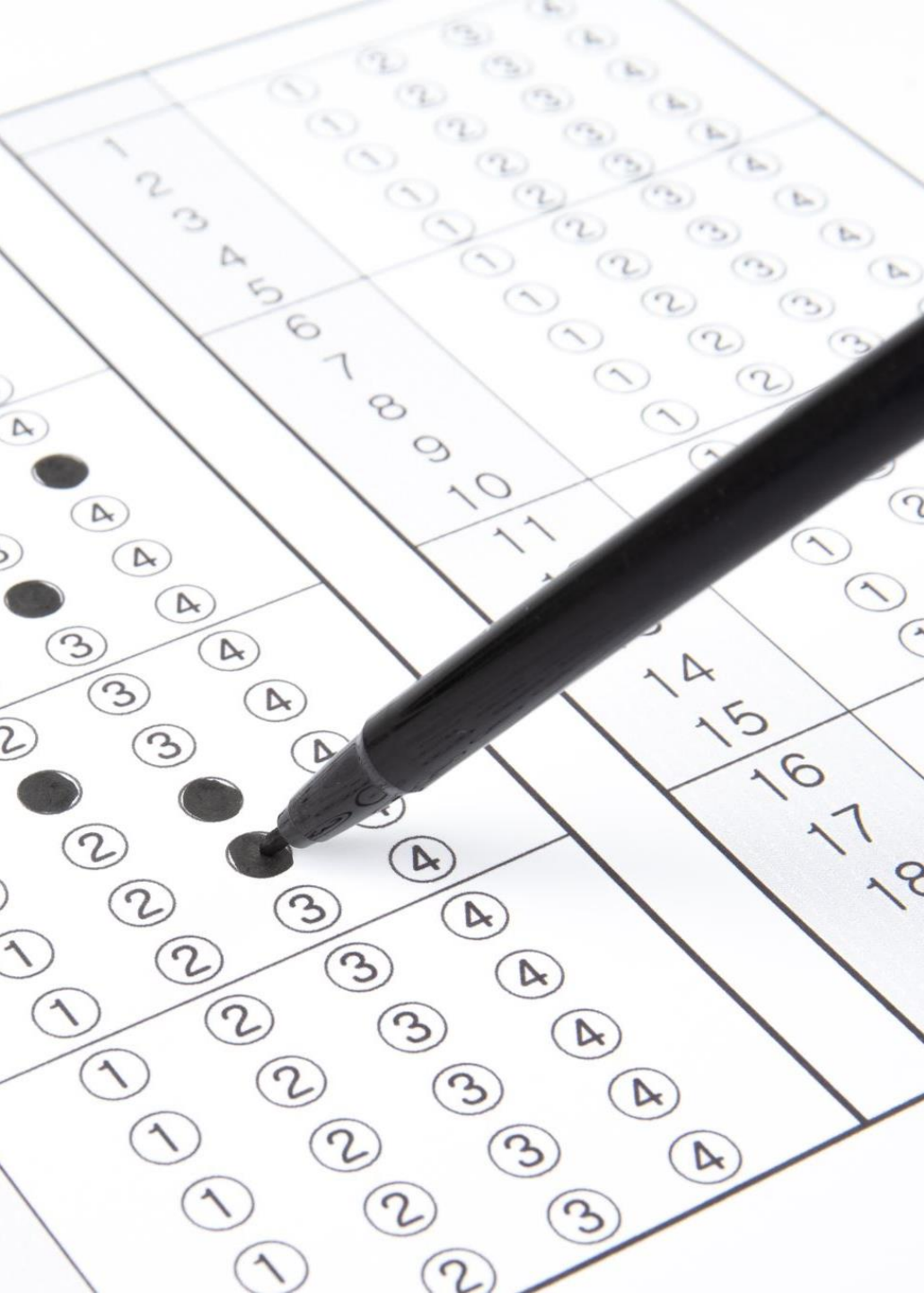
- By default, files inherit permissions from the library and site.
- **What triggers a break** – sharing a single file or folder with someone who doesn't already have access creates unique permissions on that item.
- **Why it matters** – the item no longer follows site or library changes, making access drift, audits and clean-up harder.
- **Common signs** – “Shared with” shows extra people, a broken-inheritance banner appears, or guests retain access after a project ends.
- **How to fix it** – review “Manage Access” on the item, remove direct shares, then choose “Delete unique permissions” to restore inheritance.
- **Prevent next time** – share via groups, use expiring links, and coach members to share the library, not the file.





What is a SharePoint List?

- A SharePoint list is like a smart spreadsheet that lives on your SharePoint site
- Use it to track and organise information — such as tasks, contacts, issues, or inventory
- Each row is an item and each column holds a specific piece of information (e.g. name, date, status)
- Multiple people can view and edit the same list at the same time
- You can filter, sort, and create custom views to see only what matters to you
- Lists can send notifications and trigger automated workflows when items change
- Ready-made templates are available for common scenarios like event planning and issue tracking



Demo Lists

- List From Scratch
- List from
- Template
- List From Excel
- Adding items
- Exporting lists

Exercise 5

Open the Exercises workbook

You now need to create a simple list to track work or information for your site.

Choose ONE List Scenario

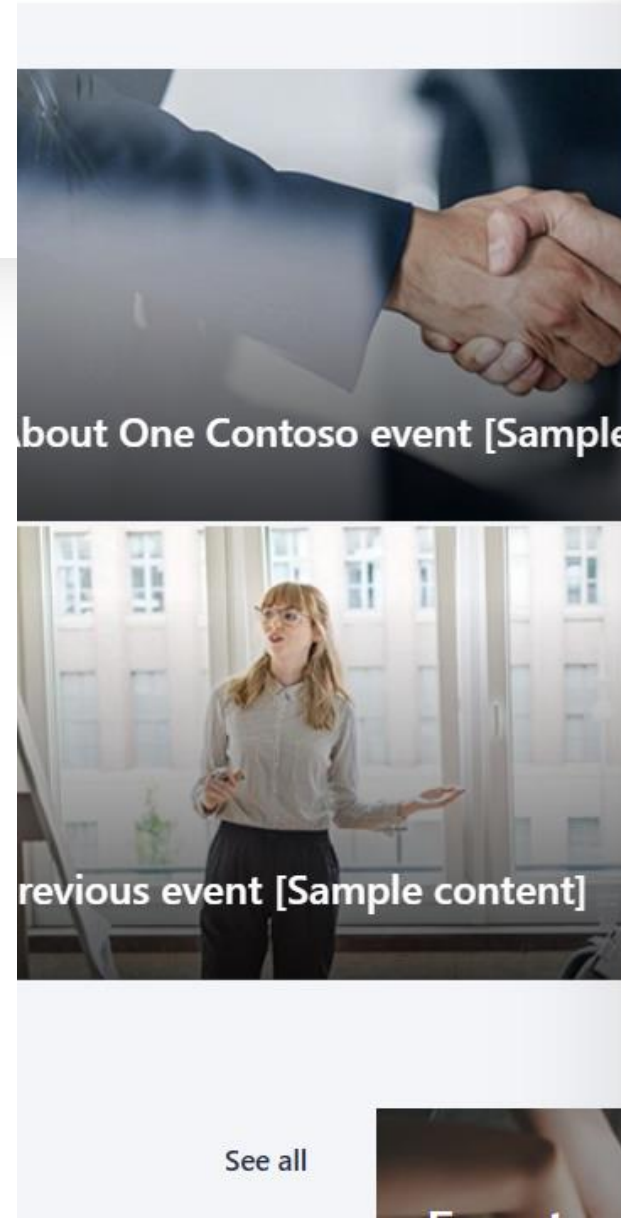
Option A: Project Team Site — create a list called **Project Tasks** to track tasks, owners, due dates, and progress.

Option B: Knowledge / Information Hub — create a list called **Article Review Tracker** to track guidance articles, reviewers, review dates, and status.

Option C: Your Own Site — create a list that supports your own site purpose.

Change the Look Menu

- Open the gear icon and choose Change the Look to customise the site's appearance
- Pick a Theme — choose a built-in colour palette or create a custom one to match your brand
- Choose a Header layout — Standard, Compact, Minimal, or Extended — and set background and logo
- Switch Navigation between Mega menu and Cascading, or move from top to left navigation
- Adjust the Footer with a custom logo, name, and links to support, policies, or contacts
- Preview your changes and click Save — hub-connected sites may inherit the hub's theme



Pr Layout **Design**

Background ^

Theme



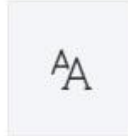


   

Image (optional)




[Add an image](#)

Display ^

Site title visibility

Site logo thumbnail ⓘ



[Save](#) [Cancel](#)

Managing Navigation Links

- Click Edit on the site's top or left navigation to add, rename, or remove links
- Link to pages, libraries, lists, external URLs, or other SharePoint sites
- Drag and drop to reorder, indent items to create sub-links and group related pages
- Use short, clear labels and keep the menu to a handful of top items for easy scanning
- Hub navigation flows down to associated sites — coordinate with the hub owner before changes
- Save changes and test as a regular member to confirm everyone can reach what they need

Home

...

Conversations

...

Teams

...

CMG

...

PowerBI

...

Documents

...

Manuals For Training

Edit

permissions

Move up

Enforce Metadata For Site

Move down

Make sub link

May Training Files

Remove

Creating Pages in SharePoint

Pages are formatted web pages on your site for sharing news, knowledge, and resources with your team or the wider organisation



News posts – announce updates, project milestones, and team wins.



Landing and hub pages – guide people to libraries, lists, and key resources in one place.



Knowledge and how-to – document processes, FAQs, and onboarding content that lives longer than chat.












Built from web parts – mix text, images, video, documents, and live data without writing code.

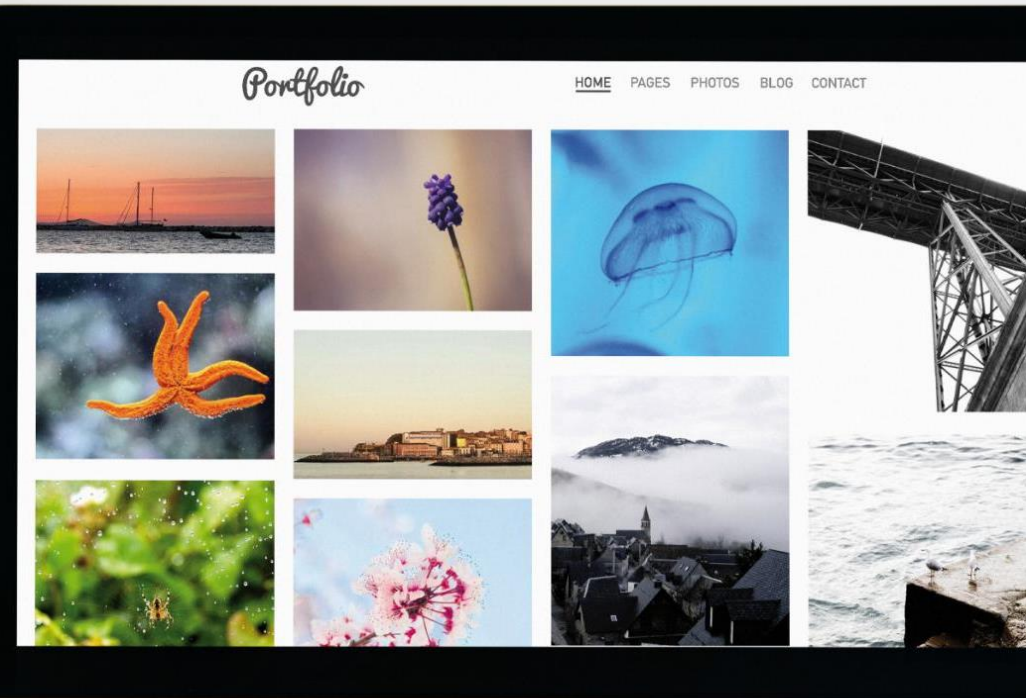


When to use a page – when content needs structure, visuals, and a stable URL — use a document if it's for editing or download.

Web Parts You'll Use Most

Essential building blocks for creating engaging SharePoint pages.

 Hero A high-impact layout to showcase up to 5 items with images and links. Perfect for the top of a home page. VISUAL	 News Automatically aggregates news posts from this site or across the organization. Keeps content fresh. DYNAMIC	 Quick Links Pin important links to documents, pages, or external sites. Customizable with icons and images. NAVIGATION
 Document Library Embed a view of a document library directly on a page. Allows users to browse files without leaving. CONTENT	 Highlighted Content Dynamically display content (docs, pages) based on filtering, sorting, or queries (e.g., "Most Recent"). DYNAMIC	 People Showcase team members or key contacts. Displays profile photos and links to contact cards. DIRECTORY
 Image & Text Standard content blocks. Use the Text web part for rich formatting and Image for visual storytelling. CONTENT	 List Display a SharePoint list (like issues, contacts, or assets) directly on the page with custom views. DATA	 Call to Action A focused button with a background image and text, designed to drive a specific user action. ENGAGEMENT



Demo Pages

Creating Pages

Learn how to design and set up new pages effectively within the platform.

Working with Web Parts

Understand how to customize pages using various web parts to add functionality and content.

Publishing

Explore the process of publishing your pages to make them accessible to users.

Exercise 6

You have created a SharePoint site, added owners and members, created a document library, and created a list.

Now you need to improve the homepage so that people can quickly understand what the site is for and where to go next.

You can design the homepage however you would like however if you need some inspiration there is a step by step guide in the exercise booklet

Site Owner Responsibilities

- Manage site permissions and membership
- Approve and review external sharing
- Curate content, libraries, and navigation
- Set metadata, retention, and naming standards
- Monitor usage, storage, and activity reports
- Onboard new members and provide support



Content Lifecycle on SharePoint

A simple guide for Site Owners

 Site Owner Guide

1



Plan

Decide what your site is for and who will use it

YOUR ACTION

Write down your site's purpose and identify who owns each type of content

2



Set Up

Build the structure: folders, permissions, and settings

YOUR ACTION

Make sure only the right people can add or edit content

3



Create

Write and publish content, then get it approved

YOUR ACTION

Set up a simple approval step before anything goes live

4



Manage

Keep content accurate and handle access requests

YOUR ACTION

Check site usage monthly and act on access requests promptly

5



Review

Check regularly that content is still correct and needed

YOUR ACTION

Set a review date on every document — at least once a year

6



Archive

Move old content to a read-only area for reference

YOUR ACTION

Move to an Archive folder and remove edit access

7



Delete

Permanently remove content once it's no longer needed

YOUR ACTION

Always check with Records Management before deleting anything

Keep Sites Organized and Secure

Information architecture, access controls, and regular auditing.

Site Structure Foundation for security

STEP 1

Info Architecture

Plan sites, libraries, and content types before building. Use Hub Sites to group related content.



STEP 2

Use Groups

Avoid individual permissions. Assign access via M365 Groups or Security Groups for easier management.

Access Control Best Practices

Groups vs. Individuals

Do: Add "Marketing Team" group to Members.

Don't: Add 20 individual names. Groups update automatically when staff changes.

External Sharing

Limit external sharing to specific libraries or folders. Review "Shared with Everyone" links regularly to prevent over-sharing.

Auditing & Monitoring

Review Cycle

Regularly review these areas to ensure your site remains secure and compliant.

PERMISSIONS

Site Permissions Report

Check 'Site usage' > 'Shared with external users' to spot unauthorized guests.

Monitoring Your Site



Check the Site usage report — visits, popular content, sharing, and trends over time



Review storage metrics and clean up large or stale files before hitting site quotas



Audit who has access — review Manage Access, group membership, and external guest list



Check the Sharing report to see what's been shared externally and revoke anything risky



Watch for broken links, outdated pages, and unused libraries — archive or update them



Run a quarterly access review and confirm site purpose, owners, and retention are still right



Monitoring Steps — Usage, Storage, Access

- Usage report — open Site contents → Site usage and review unique viewers, popular content, and sharing trends
- Usage report — switch the period to 7, 30, or 90 days and export the report to share with stakeholders
- Storage — open Site settings → Storage Metrics and sort by size to find large or unused items
- Storage — archive or delete stale files, and notify content owners before removing anything important
- Access — go to cog → Site permissions → Manage Access and review members, owners, and guests
- Access — remove anyone who no longer needs access
- Sharing — open Site usage → Sharing report and filter to external and Anyone links
- Sharing — open Manage Access on risky items and revoke, set expiry, or change to view-only



Monitoring Steps — Content, Review

- Content health — open the Pages library, sort by Modified, and review pages not touched in 6+ months
- Content health — fix or remove broken links, update owners, and archive libraries no one uses
- Quarterly review — schedule a recurring 30-minute slot and run through usage, storage, and access
- Quarterly review — confirm owners, purpose, and retention, then update the site description and tags

Thank you!



Topics Covered

Creating a SharePoint Site

Managing People and Permissions

Document Libraries

Metadata and Views

Pages

Sharing, Collaborating and Version History

Governance and Best Practices



Any Questions?