

LEARNING MADE EASY



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Set up and manage your
SharePoint site effectively

Leverage the cloud-based
online tools and features

Optimize and customize
business processes

Rosemarie Withee
Ken Withee

Coauthors of *SharePoint 2016 For Dummies*



Microsoft[®] SharePoint[®]

by Rosemarie Withee and Ken Withee

for
dummies[®]
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Microsoft® SharePoint® For Dummies®

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Introduction

Microsoft SharePoint took the world by storm in the 2000s and then didn't seem to change a whole lot in the 2010s. And now, Microsoft has stepped on the accelerator again, and SharePoint is off to the races with new features and experiences. Shifting development to a cloud-first strategy, Microsoft has put the online versions of the product in the forefront.

This book covers SharePoint Online as of the calendar year 2019 and also covers the SharePoint Server 2019 product itself. You can think of SharePoint Server 2019 as a snapshot of SharePoint Online that is designed to be installed by large IT departments at your organization. SharePoint Online, on the other hand, is the online service-based version of SharePoint that Microsoft delivers to you over the Internet. SharePoint Online is constantly changing. SharePoint Server is a glimpse of SharePoint Online at a specific point in time.

It is important to note that if your organization uses an on-premises version of SharePoint, you need to check what version you are running. *On-premises* means your IT team members have installed the software and they are the ones who manage it for you. It's common for an organization to be running an older version of SharePoint when it is installed on-premises. So be sure to check what version you are running. Past versions of SharePoint On-Premises include SharePoint Server 2010, SharePoint Server 2013, and SharePoint Server 2016.



TIP

If your organization is running SharePoint Online, then you automatically have the latest version of SharePoint and this book is for you. If your organization is running, or planning to run, SharePoint Server 2019, then this book is for you, too.

Microsoft understands that people are attached to their smartphones, and as such, they created a SharePoint Mobile App to accommodate everyone. The SharePoint Mobile App is covered throughout the book and is a new addition to SharePoint. In addition to the SharePoint Mobile App, you will also find new service integration for creating workflows using Microsoft Flow (Chapter 14), building forms with Microsoft Forms (Chapter 15), building your own mobile-based apps with PowerApps (Chapter 16), and creating data dashboards with Power BI (Chapter 23). All of these are new since the last edition of this book. Don't let the complexity of these types of features fool you. SharePoint is intended to be a self-service environment, and this book helps you get the most out of the platform without the need for years of experience.

We're not saying that SharePoint is easy; in fact, like any enterprise software system, you can expect to have a bit of a learning curve. However, if your organization uses SharePoint Server 2019 or SharePoint Online, you have a wealth of solutions to solve your particular needs, and you don't need a degree in computers to do it.

About This Book

This book is intended for anyone who encounters SharePoint or is curious about using the product. SharePoint is a vast software application with many nooks and crannies, and no single book can cover everything. This book is designed to provide an introduction and an overview of the platform. It shows you how to get the most out of the product, whether you have never used SharePoint before or are deeply familiar with specific aspects it.

Others who may benefit from this book include

- » **Developers:** This isn't a development book, but the best SharePoint developers are those who understand the product. The exciting aspect of SharePoint development is that you don't need to write programming code to develop business solutions in SharePoint. If you can work with a web browser to develop a web presence in a site like Facebook or LinkedIn, then you can develop and administer your own SharePoint site.
- » **IT professionals:** This isn't a book that explains how to set up SharePoint Server for your organization. However, this book helps you understand what features your end users may want to see in SharePoint and how you can make it happen.
- » **Managers:** If you manage a department or business unit, you need to understand how to get the most out of SharePoint. If your company has made significant investments in SharePoint deployment, it'd be a shame if you didn't know how to leverage that investment.

Foolish Assumptions

Because SharePoint is such a huge topic, we have to make some assumptions about your configuration and starting knowledge, such as

- » **You have access to some version of SharePoint Online or SharePoint Server 2019.** If you don't have access to SharePoint, then sign up for

SharePoint Online. After the free trial period, it costs as little as \$5 a month. If you want to try to install SharePoint yourself for on-premises environments, a trial license is available for 30 days. Just download it from the Microsoft download center and get started.

- » **You're a contributor or administrator.** Of course, many of the scenarios in this book require only that you be a contributor. So long as you know who your administrator is, you can ask that person for elevated permissions. And if you want to be master of your own SharePoint universe as an administrator, you can sign up for SharePoint Online and control all aspects of your SharePoint environment in a fairly intuitive interface.
- » **Ideally, you have a sandbox or test environment where you can try different scenarios.** It isn't the best strategy to lock down security on your human resources site only to find out nobody in your entire organization can get to their pay stubs. You need a test environment or test site where you can play around with SharePoint, and then take that knowledge to your department site. Luckily, if you have access to SharePoint, you have your own personal site that you can explore. Another alternative is to use SharePoint Online. (Yes, you can buy a single license.)

Icons Used in This Book

A handful of icons are used in this book. Here's what they mean:



TIP

Tips point out a handy shortcut, or they help you understand something important to SharePoint.



REMEMBER

This icon marks something to remember, such as how you handle a particularly tricky part of SharePoint configuration.



TECHNICAL
STUFF

This icon is our chance to share with you details about the inner workings of SharePoint. Most of the information you find here pertains to some aspect of SharePoint that requires configuration at the server. That means you can point out the stuff beside this icon to IT and ask IT to make SharePoint do that.



WARNING

Although the Warning icon appears rarely, when you need to be wary of a problem or common pitfall, this icon lets you know.

Beyond the Book

In addition to what you're reading right now, this product also comes with a free access-anywhere Cheat Sheet that describes some common SharePoint site templates, apps, and Web Parts, among other things. To get this Cheat Sheet, simply go to www.dummies.com and enter **SharePoint For Dummies Cheat Sheet** in the Search box.

Where to Go from Here

All right, you're all set and ready to jump into the book. You can jump in anywhere you like — the book was written to allow you to do just that. But if you want to get the full story from the beginning, turn to Chapter 1 — that's where all the action starts. (If you are already familiar with SharePoint, you might want to flip ahead to Chapter 2, where you can get your hands dirty with creating a site and developing it to fit your needs.)

1

Getting Started with SharePoint

IN THIS PART . . .

Get familiar with SharePoint as a product and platform. SharePoint is a complicated beast, and most people use only a smidgen of its functionality.

See how SharePoint Online has changed the game and what it means to use a cloud-based solution, and learn when you should use SharePoint Online or SharePoint On-Premises.

Figure out what it means to develop a SharePoint site and how SharePoint works at a fundamental level.

Get your head around the vastness of SharePoint by exploring some of its functionality at a high level.

IN THIS CHAPTER

- » Gaining a general understanding of SharePoint
- » Exploring how the product is put together
- » Getting familiar with SharePoint concepts
- » Seeing how SharePoint works at a fundamental level

Chapter **1**

Getting to Know SharePoint

When we first heard about SharePoint, we just didn't get it. What the heck was this thing called SharePoint? We knew it was a Microsoft product that was supposed to do lots of things, but we just couldn't figure out exactly what it was or how to get started working with it.

Well, after years of working with SharePoint, we have finally figured a few things out. SharePoint is a web-based software platform that is definitely capable of doing lots of things — more than you could ever imagine. And therein lies the problem. If you ask ten people what SharePoint does, you're very likely to get ten different answers. SharePoint has such a depth to it that it's hard to get your head around it.

In this chapter, we help you see the SharePoint big picture. You discover how SharePoint works and gain understanding on exactly what the term *SharePoint* means. This chapter peels away the mystery and shows you SharePoint at a basic level. After all, you need to understand SharePoint at a basic level before you can dive into its advanced functionality.

Up and Running with SharePoint in Three Minutes Flat

It is human nature to learn things by exploring and it is no different with software. You could read a hundred books about SharePoint and still barely understand what exactly it is and what it does. Our thinking is that there is no better way to get to know SharePoint than to get up and running with it, clicking buttons to see what they do.

With SharePoint Online you can get up and running with a trial in minutes. SharePoint Online comes bundled with Office 365. The easiest way to get started is to sign up for a free trial of Office 365. Here's how:

- 1. Open your favorite web browser and go to `www.office.com`.**
The Office 365 Home page appears, as shown in Figure 1-1.
- 2. Click the red button that says "Get Office."**
To get SharePoint, you will need a business plan subscription.
- 3. Click the For Business tab to see the available business plans.**
In the table that appears, you will see that the Office 365 Business Essentials plan comes with the SharePoint service and is \$5 per month (see Figure 1-2). We prefer using the latest Office clients like Word, Excel, Outlook, and PowerPoint, so we will choose the Office 365 Business Premium plan.
- 4. Scroll down to the bottom of the page and click the "Try for free" link.**
A welcome screen appears that asks for your information.
- 5. Walk through the wizard, providing your information as needed, in order to get up and running with Office 365 and SharePoint Online.**

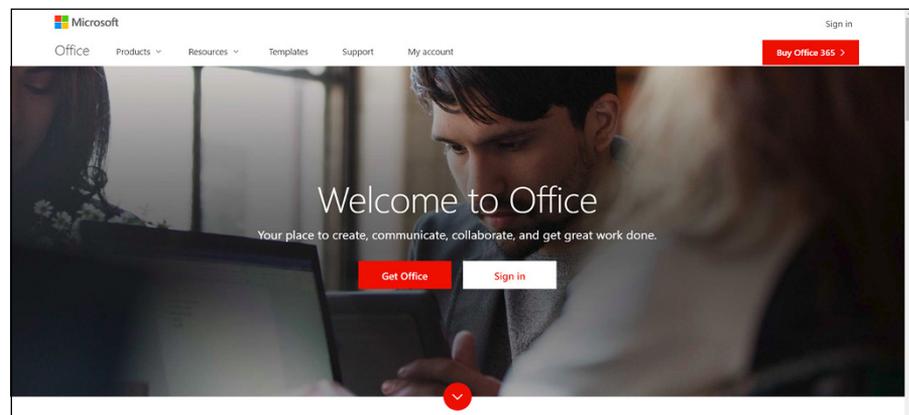


FIGURE 1-1:
The main office.
com landing
page.

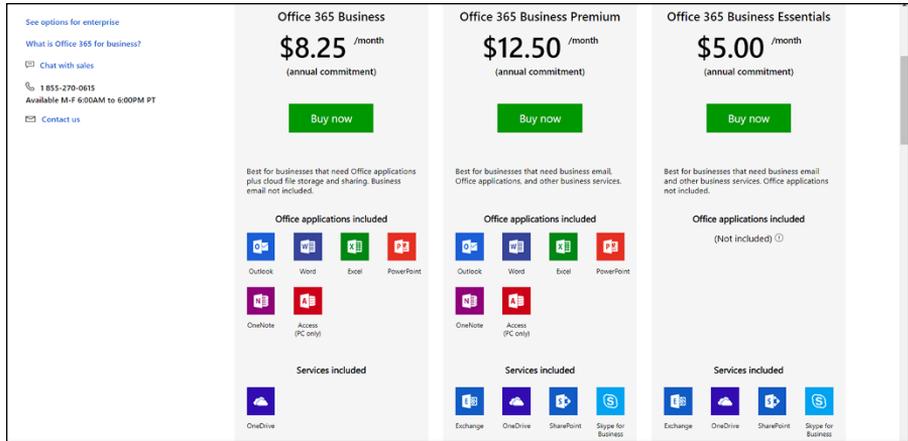


FIGURE 1-2: Choosing an Office 365 business plan.



TIP

Note that as a business name you can just use your own name and choose that your business size is 1 person. You will then choose a domain name, which is <your choice>.onmicrosoft.com. This is your Office 365 domain. In our example, we chose sp2019fd.onmicrosoft.com for our domain. You can always add a custom domain later if you prefer. For example, we might connect sharepoint-2019fordummies.com to our Office 365 account and get emails there, too.

Once you have filled out the information, your free trial will be created, as shown in Figure 1-3. This can take a few minutes. Once it is created, you will be given a link to go to your Office 365 dashboard.

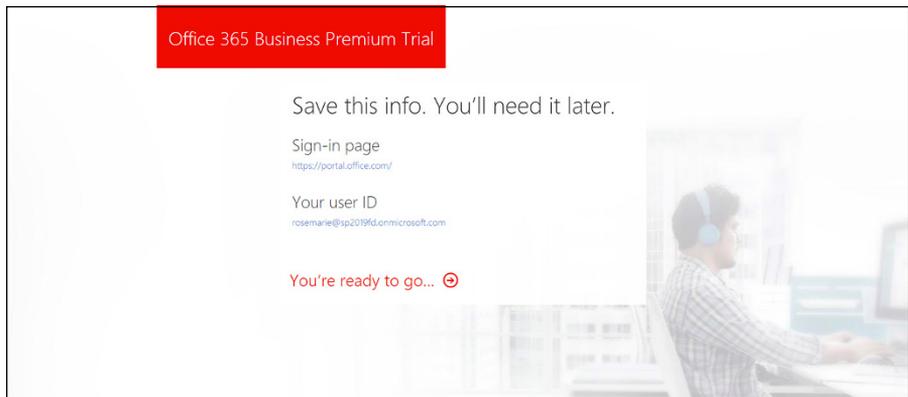


FIGURE 1-3: Completing the sign-up process for the free trial.

When you first land on your Office 365 dashboard, you will see a quick tutorial and then be presented with the Office 365 main landing page, as shown in Figure 1-4. (If you want to learn more about Office 365, we recommend checking out *Office 365*

For Dummies, 3rd Edition.) In this case we are focused on SharePoint, so let's crack it open and get started.

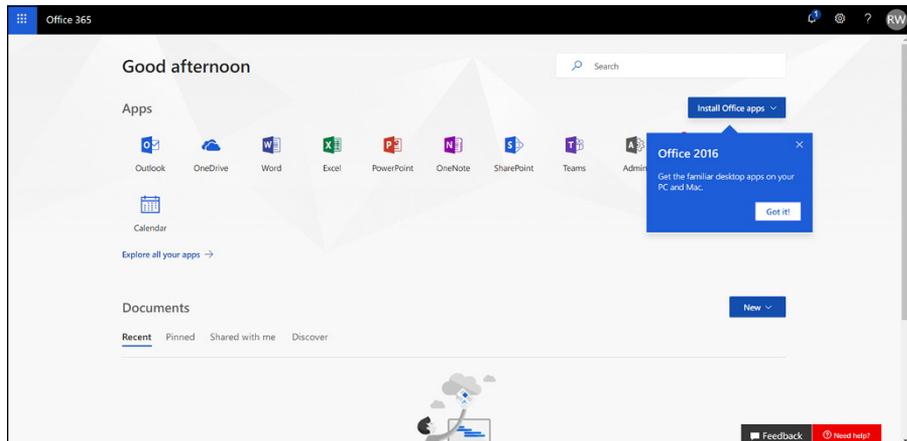


FIGURE 1-4:
The main
Office 365
landing page.

- 1. Click the SharePoint icon in the Apps section of your dashboard.**

Because this is the first time you are opening SharePoint Online, you will be presented with a quick tutorial. After you finish the tutorial, you will be presented with a welcome screen for SharePoint and an easy way to create your first site, create a post, or install the SharePoint Mobile App. Right now, we just want to create our very own SharePoint site.

- 2. Click the “Create site” link at the top of the page, as shown in Figure 1-5.**

You will be given a choice: create a team site or create a Communications site. Chapter 5 explores the different types of sites. For now, the team site will suit our purpose.

- 3. Choose team site and give the new site a name.**

The dialog box that appears provides a group email alias for the site and shows you the URL you will use to access the SharePoint team site. You can also provide a description and set basic privacy settings (see Figure 1-6).

- 4. Click Finish in the next dialog box that appears.**

In this dialog box, you are able to add any additional owners or members of the team site. In our case, we are the only user of our new Office 365 subscription right now.

Congratulations! Just like that you are up and running with your very own SharePoint site (see Figure 1-7). Feel free to start clicking around and exploring it, or wait until you read about various functionality through the book.

Click to create a SharePoint site

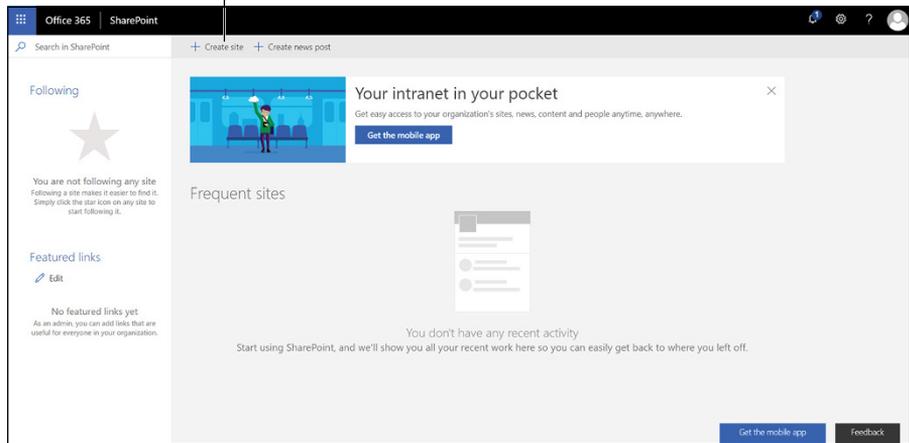


FIGURE 1-5: The SharePoint landing page where you can create a new site.

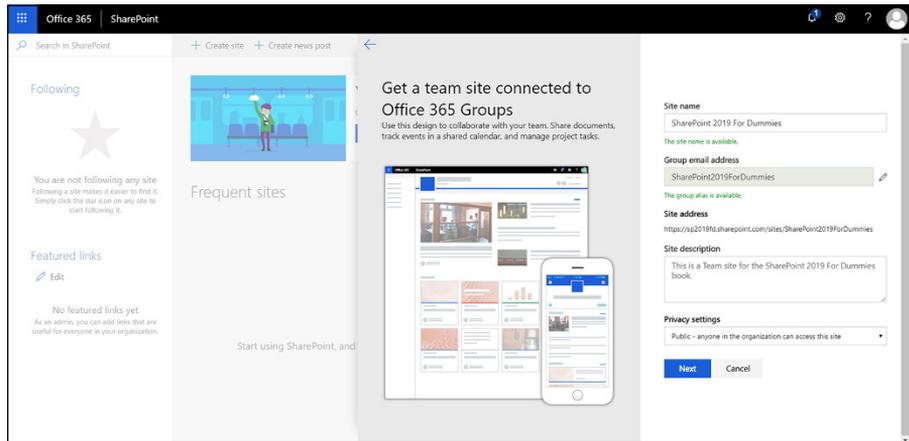


FIGURE 1-6: Creating a new SharePoint site.



TIP

You can always get back to your Office 365 dashboard and your SharePoint site by opening your web browser and going to `www.office.com` and logging in with the user you created.



TIP

If you are using SharePoint Server 2019, your IT team has likely installed SharePoint at your office location. Since the installation is at your local company premises instead of in a Microsoft data center somewhere, the term for this version is aptly called *on-premises*. If your organization is using SharePoint on-premises, your IT team will have likely created your SharePoint site for you and sent you a link to access it. (You find out more about the differences between SharePoint Online and SharePoint On-Premises in Chapter 2.)

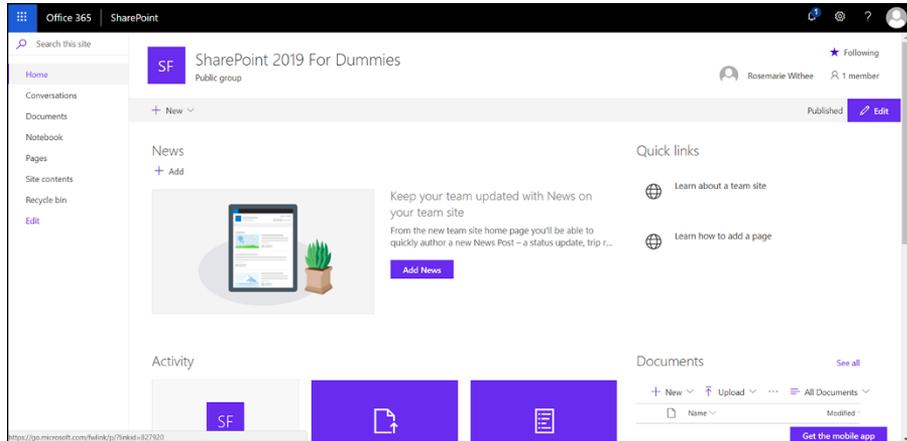


FIGURE 1-7:
A new SharePoint
team site.

Wrapping Your Head around SharePoint

At a basic level, SharePoint is a *web-based software platform*, meaning that SharePoint is software designed for you to interact with using a web browser.



TIP

In past versions of SharePoint, you really needed to use Microsoft's web browser to work with SharePoint. Times have changed though, and you can now use most any web browser to work with SharePoint. Best yet, Microsoft supports the browser and doesn't care what operating system you are using. Prefer to use a Mac? No problem. Is Linux your thing? SharePoint is supported.

No, really, what is SharePoint?

Maybe you're a whiz at Microsoft Word or a spreadsheet jockey with Excel. Going forward, you're going to have to be just as good at SharePoint to get the most out of your desktop Office client applications. Microsoft continues to integrate functionality that used to be locked up in client applications, or not available at all, with SharePoint. For example, using SharePoint 2019 with Office 2019, you can create your own mobile apps with PowerApps, create an online gallery of PowerPoint slides, display interactive spreadsheets in web pages, create rich forms with Microsoft Forms, surface data from all over the Internet into dashboards using Power BI, and reuse information from your company's databases in Word documents just to name a few. You can even use SharePoint right from Microsoft Teams without ever realizing you are using SharePoint. We cover all of these scenarios throughout the book.

Officially, Microsoft represents SharePoint 2019 as a “business collaboration platform for the enterprise and web.” *SharePoint* is a platform from Microsoft that allows businesses to meet their diverse needs in the following domains:

- » **Collaboration:** Use SharePoint’s collaboration sites for activities, such as managing projects or coordinating a request for proposal.
- » **Social networking:** If you work in a large company, you can use SharePoint as a social network for the Enterprise experience to help you track coworkers and locate people in expertise networks.
- » **Information portals and internal websites:** With SharePoint’s web content management features, you can create useful self-service internal portals and intranets.
- » **Enterprise content management:** SharePoint offers excellent document- and record-management capabilities, including extensive support for metadata and customized search experiences.
- » **Business intelligence:** SharePoint is an ideal platform for providing entrée into your organization’s business analysis assets. It integrates with Power BI and lets you create insightful dashboards from data all over your organization and the Internet (not just SharePoint).
- » **Business applications:** Use SharePoint to host sophisticated business applications, integrate business processes’ backend databases and your SharePoint content, or simply use SharePoint as the means to present access to your applications.

You can approach SharePoint with the following model in mind:

- » **Product:** SharePoint is a product with a lot of features. Explore how SharePoint works without any customization when you’re deciding how to approach a solution, and then decide if you want to customize it for your specific needs.
- » **Platform:** SharePoint provides everything you need to deliver a robust business solution. It provides the infrastructure (the “plumbing”) required to deliver web-based solutions and has many prepackaged solutions you can use right out of the box without any customizations at all.
- » **Toolkit:** Finally, SharePoint is a set of components and controls that you can mix and match to provide a solution. You can create sites, pages, and apps, all without leaving the comfort of your web browser. You can bring this same concept to mobile devices with the SharePoint Mobile App and PowerApps.

A Microsoft product

SharePoint is a software product that Microsoft develops and sells to customers. If you followed along and created an Office 365 Business Premium account, you will eventually have to pay Microsoft \$12.50 per month in order to continue using it. If you choose the Office 365 Business Essentials plan, you will get SharePoint, but not the Office clients, and will pay \$5 per month. Regardless of how you purchase and use SharePoint, you can rest assured that your organization is paying Microsoft a licensing fee. In other words, SharePoint isn't free.

In the past, SharePoint was a considerable cost for an organization wanting to adopt it. In addition to buying all of the licenses for your organization, you would also need an IT team to install and manage it. For this reason, SharePoint used to be considered enterprise-class software, as only large organizations could afford it. This has all changed. In the first few minutes of reading this book you have already gotten up and running with SharePoint. In the past, it would have taken months for a giant IT project to get SharePoint up and running. You just did it in minutes!

Many different SharePoint definitions

SharePoint has many different types of users, and depending on where your role fits in, you might have a very different experience from a fellow SharePoint user. For example, you might be assigned to create and administer a SharePoint website for your team. In this case, you might see first-hand the vast functionality of SharePoint websites. On the other hand, you might be a user of a SharePoint site. In this case, your SharePoint world might be only the site that someone has already created for you. To confuse matters even further, many organizations will roll out SharePoint and give it a spiffy internal name; for example, "Connect." So even though the cool new web tool called Connect is actually SharePoint, most users don't even realize it!

On the more technical side, if you're an infrastructure administrator, you see SharePoint as a platform capable of offloading the difficult job of website administration. If you're a software developer, you see SharePoint as a web platform for developing programs for users.

The vastness of SharePoint creates areas of specialization. The result is that a person's view of SharePoint is greatly affected by how that person uses the product. It's important to keep this in mind when talking with people about SharePoint. If you ask ten people to define SharePoint, you're likely to get ten different answers, as illustrated in Figure 1-8.

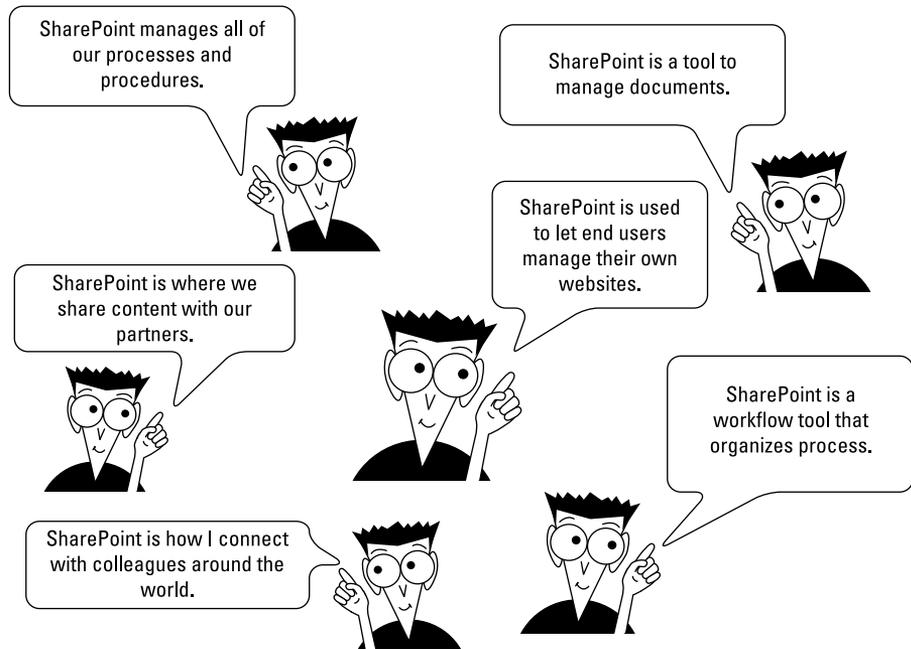


FIGURE 1-8: There are many different ways to define SharePoint.



TIP

SharePoint has many different administration levels, and each requires a different level of technical ability. For example, if you're comfortable working with software like Microsoft Word and Excel, then you won't have any problem administering a SharePoint site. At a deeper level, there are also SharePoint infrastructure administrators. To administer SharePoint at the infrastructure level is a role that falls squarely into the realm of the IT geeks.

SharePoint is a platform, so the user roles an organization defines depend on the organization itself. Here are some examples of the possible roles of users in SharePoint:

- » **Anonymous visitor:** A person who browses to a website that just happens to be using the SharePoint platform. An anonymous visitor just sees SharePoint as a website and nothing else.
- » **SharePoint visitor:** A person who browses to the site and authenticates so that SharePoint knows who they are. The visitor might still just see a SharePoint site as any other website, except he notices his name in the top-right corner of the screen and knows he must log in to reach the site. Visitors might not use any of the features of SharePoint, however, and just browse the information posted to the website.
- » **SharePoint casual user:** A person who knows all the company documents are posted to SharePoint and knows she can upload her own documents to

her personal SharePoint site. A casual user might realize that she is using SharePoint, or she might just think of the platform as the name the organization has given to SharePoint. For example, we have seen organizations give their web platform tool names such as Source or Smart or Knowledge Center. SharePoint is the name of the web platform product from Microsoft, which is often unknown by users of a tool built on the SharePoint platform.

- » **SharePoint user:** A person who is familiar with SharePoint and its main features. A SharePoint user often performs various administrator functions even if he doesn't realize it. For example, he might be responsible for an app that stores all the company policies and procedures. He is thus an app administrator. A user might also be responsible for a site for a small team, in which case he is a site administrator. As you can see, a user can play many different roles.
- » **SharePoint power user:** A power user is not only familiar with the main SharePoint features and functionality but also dives deeper. A power user might be familiar with the functionality differences of different features, routing documents using workflows, and building site hierarchies. A power user might also be a site collection administrator and thus is responsible for a collection of sites.
- » **SharePoint technical administrator:** A technical administrator is someone from the IT department who is responsible for SharePoint. A technical administrator is less concerned with using SharePoint for business and more concerned about making sure the platform is available and responsive. An administrator might play many different roles. For example, farm administrators are responsible for all the servers that make up SharePoint, such as web front end servers, applications servers, and database servers. Specialized database administrators focus just on the database components. There are even administrative roles for specific services, such as the search service or user profile service. Depending on the size of the SharePoint implementation, these technical administrator roles might be filled by a single overworked individual or a team with highly specialized skills.

More than a website

SharePoint is called a *web platform*, as opposed to just a website, because of the sheer amount of functionality and capabilities it includes. In fact, if you already administer a SharePoint website, you can easily create a new website right within the existing website. You can also develop websites with an extraordinary amount of functionality without writing a single line of code. The result is a platform for websites instead of just a single website. The multitude of features and the complexity of the product are what lead to confusion.

THE DIFFERENCE BETWEEN SOCIAL MEDIA AND SHAREPOINT

SharePoint and social media websites such as Facebook, LinkedIn, and Twitter are similar in that you interact with them using your web browser. The difference is in the intended use. Facebook, LinkedIn, and Twitter are designed for consumers as a whole, whereas SharePoint is designed for individual organizations.

SharePoint has many of the social and profile features of Facebook, LinkedIn, and Twitter, but these features are only available to people within your organization. In other words, only the people in your organization can use the features of SharePoint. Although SharePoint includes social and profile features, it also includes much, much more. Think of SharePoint as a product for business and productivity that also happens to have the social and profile features of sites such as Facebook, LinkedIn, and Twitter.



TIP

The terms *SharePoint website* and *SharePoint site* can be used interchangeably. Both terms mean a website that is powered by SharePoint. Because this book is all about SharePoint, we sometimes abbreviate these terms to just *site*.

One thing that makes SharePoint so special is that you don't need to be a computer genius or even a power user to be a website developer and administrator in SharePoint. You just need to be comfortable using a computer.



TIP

The terms *website* and *web application* are often used interchangeably. In the deep, dark technical world of SharePoint administration, the term *web application* has a very specific meaning. A web application is a technical construct, and each web application has its own databases associated with it. If you create two SharePoint web applications, they store their content and configuration information in different databases. As with technology these days, a simple word can have different meanings, depending on the context of the conversation.

Taking a Peek at a SharePoint Site

The primary purpose of SharePoint is to provide websites to members of an organization or employees of a company. When you create a website, you select which type of template you want to use to create the site. The dialog box shown in Figure 1-9 shows the different templates available.

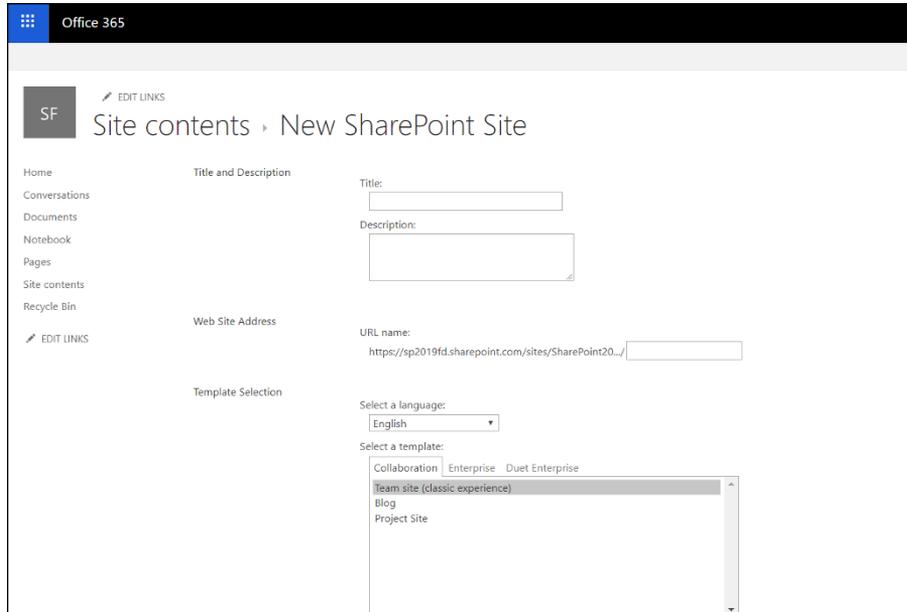


FIGURE 1-9:
The dialog box used to select a website template when creating a SharePoint site.



TIP

The templates you have available depend on where you are creating your SharePoint site and what features have been activated for your SharePoint environment. For example, in SharePoint Online, a tab for Duet Enterprise and, if the publishing feature is active, then you will also see Publishing. If you are looking for a template that doesn't appear in the list of templates, you will need to figure out which SharePoint feature makes the template available. SharePoint features are explored in more detail in Chapter 17.

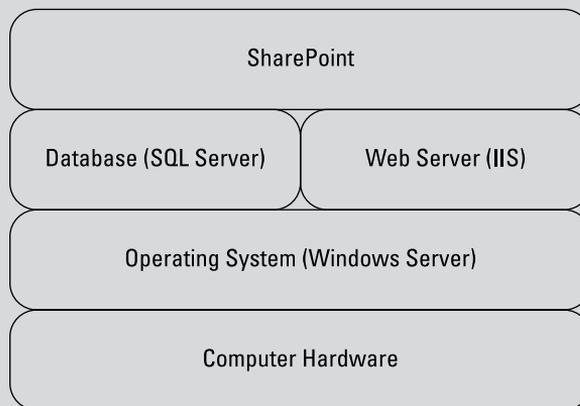
The template tells SharePoint which features and functionality should be included on the site. Keep in mind that you can always add more features and add and remove features as you decide to make your site more specific for your needs.

One of the most common SharePoint site templates is called the Team Site template (the template you used at the beginning of this chapter). The Team Site template includes features such as a discussion board, a library to store documents, and a calendar. In fact, many books simply talk about the Team Site template and call that SharePoint. As you learn in this book, the Team Site template is very important, but it is just another SharePoint website template. Part 3 explores building and customizing a site based on the Team Site template.

TECHNICAL DIVE INTO THE SHAREPOINT BUILDING BLOCKS

To obtain a perspective on SharePoint, it is important to understand how SharePoint is put together. As mentioned in this chapter, SharePoint is a web-based platform. A number of technologies are required in order to make the platform available. Each technology builds on the one below it. In this manner, it is common to call the whole ball of wax a *technology stack*.

The SharePoint technology stack begins with server computers running the Microsoft Windows Server operating system. On top of Windows Server are some additional technologies required by SharePoint. In particular, SharePoint needs a database and a web server — Microsoft SQL Server and Microsoft Internet Information Services (IIS), respectively. In addition, SharePoint also needs Active Directory, which manages the servers in the domain. Only when this entire stack of technology is available can you install SharePoint, as shown in the figure.



SharePoint will only work with the Microsoft stack of supporting technologies. For example, you cannot swap in an Oracle database or the open source Apache web server. SharePoint would simply refuse to install and might ask you what the heck you are trying to do using a non-Microsoft product to install SharePoint.

Getting Familiar with SharePoint Terminology

You should add a number of terms to your SharePoint vocabulary. Some terms are made up by Microsoft marketing, some are industry standards, and others are buzzwords that have grown to have various meanings depending on the context of the conversation. In the following sections, I describe the various components of SharePoint, how the terms that define functionality fit together, and what they mean.

Branding

The term *branding* refers to the way a SharePoint site looks and behaves to users. Branding includes things like the colors, fonts, images, logos, and layout of the various components on a site. Branding your SharePoint site is covered in Chapter 17.

The term *branding* is not specific to SharePoint; it is borrowed from the marketing industry in which an organization will brand its product. For example, Coca-Cola has a very strong brand. In the software world, *branding* refers to the look and feel of a piece of software or website.

Business intelligence (BI)

The term *business intelligence* is definitely not new. An article was published in the October 1958 edition of the *IBM Journal* by H. P. Luhn called “A Business Intelligence System.” The article describes how an organization can process documents in order to make business decisions. Business intelligence has continued to evolve over the years and has morphed into something of a catch-all phrase for using data to drive business.

In the Microsoft realm, business intelligence (BI, pronounced *bee-eye*) consists of a number of different technologies. In fact, we wrote an entire sister book on the subject — *Microsoft Business Intelligence For Dummies* by Ken Withee. As SharePoint has become a central and nearly ubiquitous application, it has also become a prime place to show the data that decision makers need to make decisions. In other words, SharePoint is a perfect display case for all those fancy charts, graphs, performance indicators, and other data.

Unfortunately, business intelligence has a fairly steep learning curve in SharePoint. Tools such as Report Builder, Dashboard Designer, and PowerPivot unleash endless possibilities, but figuring out how to use them all takes time. One thing you

will find with business intelligence in SharePoint is that there are often many ways to achieve the same result. And therein lies the learning curve.

At the basic level, if you can create a chart in Excel, you can plunk it into a SharePoint library and embed it on a page using a Web Part (which is a component that shows data on the page). Ta-da! You just achieved business intelligence in SharePoint. The consumers of the data might never even know how easy it was to put that data in Excel and embed it in a SharePoint web page. And that is the point. These things shouldn't be difficult to get started.

At the other end of the spectrum, however, you might need to create a data cube (a specialized database in the big data world) with millions or billions of records, and then use a specialized tool such as Dashboard Designer to create an interactive graph with clickthrough capabilities. Whew! That sounds complicated, and trust me, it is.

You need serious expertise when diving into the depths of business intelligence, but that doesn't mean you can't understand it at a high level. Many different tools and features make up business intelligence in SharePoint, and Chapter 23 covers one of the latest business intelligence services from Microsoft called Power BI. In that chapter, we discuss Power BI and also walk you through the other SharePoint business intelligence features at a high level. We try to provide you with insights into techniques you can use to get started right away.

eDiscovery

The term *eDiscovery* relates to the legal world of business. In particular, the word derives from *electronic discovery* in litigation. If you have ever watched the TV program *Law & Order*, you understand that critical evidence can make or break a case. In the high-tech world of digital information, it's a rather tricky endeavor to discover and hold electronic documents.

SharePoint has a number of features specifically designed for eDiscovery. This is great news if you're a decision maker looking to comply with legal requirements, or you're a lawyer. If neither applies to you, then just knowing SharePoint handles eDiscovery is good enough.

Identity management

Frankly, modern technology can often be a real pain. It seems that there are gazillions of systems in any organization, and each requires its own username and password. I have so many usernames and passwords on various websites across the Internet that my mind just tries to block it out. Of course, then I forget my password and have to go through the tiring process of resetting it each time I want

to log in to a particular system. On the other side, when a user logs in to a system, that system also needs to know what the user can access.



TIP

Identity management refers to the functionality of a software system that manages users and what they can access. Identity management isn't specific to SharePoint and is used by any system that requires you to enter a username and password.

Microsoft has made great strides in simplifying identity management. SharePoint uses claims-based authentication in conjunction with an open authentication standard called Open Authorization (OAuth for short) in order to play nicely with other systems. What this means for you is that you shouldn't have to remember yet another username and password when working with SharePoint. If only the rest of the Internet could be so thoughtful!

Mobile

The computing world has become mobile. People are more likely to have their computing device be their phone and tablet than any other type of computer. Microsoft recognized this and created the SharePoint Mobile App and also created a tool called PowerApps that allows you to create mobile SharePoint apps without needing to be a programmer. We cover the SharePoint Mobile App throughout the book and we cover PowerApps in Chapter 16.

Records management and compliance

In the world of information work, you often hear about *records management* and *compliance*. Depending on how much of a rebel you are, you might think of these terms as keeping people and processes in line or as an invitation to break some rules.

Every organization has a different set of rules around managing records and keeping processes compliant with company policy. This line of thinking is not specific to SharePoint, and, depending on your organization and industry, could be buttoned-up strict, as in the banking industry, or open to the world and free loving, as in many technology startup companies.

In SharePoint, a number of features are specifically designed to keep records organized and easily managed. In addition, SharePoint has compliance features that even the stodgiest of stodgy big banks will adore. And as someone who has done consulting work for the banking industry, let me tell you, there are some really strict compliance rules out there. (Considering that they're keeping track of our money, that's a good thing.)

Search

If you have ever used Google, Bing, or Duckduckgo.com, then you're familiar with search engines. These search engines for the Internet are amazingly powerful and eerily comprehensive. SharePoint does a bang-up job of managing content, and the next logical step in managing content is finding content when you need it. As an organization grows, the need for search grows too. Search is covered in more detail in Chapter 22.



TIP

Search is one of those topics that spans from simple to mind-numbingly complex. At a base level, you have search capabilities for every SharePoint site right out of the box. The tech geeks can go deeper and optimize search for your organization. For example, your search query can be aware of your role in the organization and display results specifically for you. So, for example, if you're in sales and searching for a product, your search results will be sales materials. If you're an engineer and searching for a product, your results will include specifications. SharePoint search can make this happen, but configuring it is best left to the IT department.

Social

In recent years, computers and the Internet have been connecting people like never before. This new way of interacting through computers is called social computing. The biggest public social network of all is Facebook. Not every organization wants to be in such a public space though.

SharePoint is designed for organizations, and the social aspects of SharePoint share a common goal with Facebook — connecting people. The difference is that SharePoint connections are limited to people within a particular organization. The social aspects of SharePoint are covered in Chapter 10.

Web content management

Content is a fairly simple concept. When you create a Word document or an Excel spreadsheet, you generate content. If you develop a web page for your colleagues to admire, you generate content. Even if you just pull out a pencil and paper and start writing, that's content. If you scanned that paper, you could then let SharePoint work its content management wonders on the scanned image file.

SharePoint is especially powerful in handling content, as described in Part 5. One particularly tricky piece of content, however, is the content you develop for websites. You know, all of those web pages that contain policies and procedures and documentation and all of that? If the content is created for a web page, then it's web content and it holds a special place in the heart of SharePoint. The web

content management features of SharePoint are legendary, and many organizations first started using SharePoint for just this reason.



TIP

Content management often goes by the name Enterprise Content Management (ECM). Don't be fooled by the terminology though. The *Enterprise* portion of ECM just means the system manages content at a large scale, as found in a large company or enterprise.

SharePoint and web content have a special relationship that all comes down to delegation and control. SharePoint provides the ability for many people to generate content and for a few people to approve content. This maintains order because a select group of people control what goes out to the world. SharePoint streamlines this process by allowing approved content to be published automatically.

You might be wondering what makes the relationship between SharePoint and web content so special. Well, it all comes down to delegation and control. SharePoint provides the ability for many people to generate content and for a few to approve content. After it's approved, content can be published automatically to be consumed by the world or those in your organization.

Workflow

Workflow is one of those things in business that happens whether anyone wants it or not. If more than one person is required to achieve a goal, then a workflow is involved. SharePoint has been good in the past at handling workflow within SharePoint, but it lacked integration with other products. To address this deficiency, Microsoft created a new product called Microsoft Flow. Microsoft Flow is not part of SharePoint, but it integrates with SharePoint as well as with many, many other products (both Microsoft and others).

Using Microsoft Flow you can finally build a workflow that mimics the way you work. If you use products such as Survey Monkey, GitHub, Twitter, or many others, you can use Microsoft Flow to build workflows that integrate with SharePoint. We cover using Microsoft Flow with SharePoint in Chapter 14.

- » Exploring SharePoint Online
- » Determining why SharePoint Online has become so popular
- » Finding out what version of SharePoint you are using
- » Understanding the benefits to a service-based offering

Chapter 2

Introducing SharePoint in Office 365

Just a handful of years ago, it wasn't easy to adopt SharePoint. SharePoint fell squarely into the realm of enterprise-class software. *Enterprise-class software* is powerful, expensive, and resource-intensive. In order to adopt SharePoint, you needed to be a large organization with big bucks and a large IT support team.

The rapid rise of super-fast and ubiquitous Internet connectivity caused a paradigm shift in the software world. Microsoft and other companies quickly came out with new applications that offered enterprise-class software, including SharePoint, over the Internet. Microsoft branded its SharePoint offering as SharePoint Online and packaged it with products such as Exchange (email), Teams (instant communication), and Office (productivity). The combined package of services (SharePoint, Exchange, Teams, and Office) is called Office 365. To find out how the technologies in Office 365 fit together, check out *Office 365 For Dummies*, 3rd Edition.



TIP

Microsoft continues to bundle these products, and as of 2019, the next wave of bundling will be called Microsoft 365. Microsoft 365 will include Office 365, but will also offer the ability to bundle other subscription services at reduced rates. These other services include Windows licensing and management and other

products and services. We expect that soon we will be talking about Microsoft 365 the same way we now talk about Office 365.

In this chapter, you see how SharePoint Online has changed the game and what it means to use a cloud-based solution. You will read about the differences between SharePoint Online and SharePoint On-Premises and find out which you should use and when. Finally, you explore some of the benefits of using SharePoint Online.

Accessing and Using SharePoint

At its heart, SharePoint is a website. To use it, you open up your web browser and navigate to the location of your SharePoint site. With that said, Microsoft has recognized that the world has moved to a mobile-first environment. Many people do all of their computing with a mobile phone or tablet. To accommodate this, Microsoft created the SharePoint Mobile App. The SharePoint Mobile App can be installed on your iOS or Android device and used to interact with SharePoint.



TIP

Many people who are brand new to SharePoint might only access and work with SharePoint through a mobile app on their smartphones or tablet devices. Even if you only use a mobile device, you should be aware that you can always open a web browser on a good old-fashioned desktop or laptop computer and access SharePoint.

We cover signing up for SharePoint with Office 365 and opening it with a web browser in Chapter 1, and we cover installing the SharePoint Mobile App in Chapter 3.

Getting Familiar with SharePoint Online

Microsoft offers SharePoint over the Internet in a product called SharePoint Online. With SharePoint Online, Microsoft takes care of all the heavy lifting. To get SharePoint going, someone has to procure and set up the servers, and install the operating system, databases, web server, and SharePoint server. This all has to be done in a special climate-controlled room called a data center. The data center has to be secure and redundant. After all, what if a disaster happened and the data center computers in the data center — or worse, the data center itself — were destroyed? Finally, the whole setup must be scalable so that as more users begin using SharePoint for mission-critical business processes, the servers and sites can keep up with the added load. And that isn't the end — after everything is up