

SharePoint Online

Optimize your document management

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IT-SPECIALIST APPLICATION DEVELOPMENT

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1.Introduction to SharePoint Online

What is SharePoint Online?

SharePoint Online is a cloud-based utility from Microsoft that helps businesses organize and manage their content and collaboration. It allows users to create and share documents, web pages, lists and other content, as well as collaborate on documents. SharePoint Online is part of Microsoft 365, a subscription service that includes Office applications, Exchange Online, and Teams.

Some of the key features of SharePoint Online include:

Document Libraries: Users can upload, edit, and share documents, manage versions, and check who can access them.

Lists: Users can create lists to manage data such as contacts, tasks, or events. Lists can also be automatically synchronized with Excel.

Websites: Users can create and publish websites to make content accessible to their teams or the entire organization.

Workflows: SharePoint Online offers a variety of workflow options that allow users to automatically manage processes such as approvals and releases.

Search: SharePoint Online offers a powerful search capability that enables users to quickly and easily find content within the organization.

Built-in security: SharePoint Online offers built-in security features that keep data secure, including the ability to manage user and group access rights.

SharePoint Online enables companies to effectively organize and manage their content and collaboration, and offers a variety of features that improve collaboration and communication within the organization.

Architecture of SharePoint Online

SharePoint Online's architecture is broken down into a few key components that work together to ensure the functionality and performance of the service.

Front End Servers: These servers are responsible for interacting with users and processing requests such as viewing web pages and uploading documents. They also communicate with the back-end servers to obtain the necessary data.

Back End Servers: These servers are responsible for managing the databases and processing requests. They store the contents of SharePoint, such as documents, lists, and web pages, and make them available to the front-end servers on request.

Databases: SharePoint Online uses SQL databases to store content and metadata. There are several types of databases that are used, such as the content database, which holds the content, and the configuration database, which holds the configuration information.

SharePoint Services: These are the services that provide the functionality of SharePoint, such as search, workflow management, and user rights management. These services run on the back-end servers and communicate with front-end servers and databases to carry out their tasks.

Network components: SharePoint Online uses various network components to ensure communication between the various components. This includes firewalls, load balancers, and DNS servers.

Management Components: These components are responsible for managing and monitoring the service. This includes tools for monitoring performance, troubleshooting, and managing security and compliance.

User interface: SharePoint Online offers a user-friendly interface that allows users to easily find and manage content and collaboration. This interface can be accessed via a web browser or mobile applications.

Overall, the architecture of SharePoint Online is very flexible and scalable to meet the needs of any size organization. Capable of managing massive amounts of content and users, it allows users to access their content and collaboration from anywhere and on any device.

One of the most important features of SharePoint Online is the ability to customize and extend the content to meet the specific needs of the organization. There are a variety of tools and technologies that have been developed to extend the functionality of SharePoint, such as SharePoint apps, web parts, and the SharePoint Framework.

SharePoint Online also uses cloud technologies like Microsoft Azure to ensure the availability, scalability and security of the service. It also offers built-in security features such as authentication, encryption, and compliance features.

Overall, the SharePoint Online architecture is a powerful and flexible framework that enables organizations to effectively manage and leverage their content and collaboration. It enables users to access their content and collaboration from anywhere, on any device, and offers comprehensive security and compliance support.

Supported Platforms

SharePoint Online is part of the Microsoft 365 family and therefore supports a wide range of platforms and devices. It is compatible with popular web browsers such as Google Chrome, Mozilla Firefox, Microsoft Edge and Safari, but also with mobile devices such as iOS and Android smartphones and tablets.

On the desktop, SharePoint Online can be used using Office applications such as Word, Excel and PowerPoint. These applications allow users to create, edit and share their content directly in SharePoint.

A SharePoint app is available on mobile devices, allowing users to access and edit their content and collaboration on the go. This app is available for both iOS and Android devices and offers the same functionality as the desktop apps.

Another platform that supports SharePoint Online is Microsoft Teams. Teams is a communication and collaboration platform that enables users to communicate and collaborate in real time. SharePoint Online is tightly integrated with Teams and allows users to create and share their content directly in Teams.

Overall, SharePoint Online supports a wide range of platforms and devices, allowing users to access and leverage their content and collaboration from anywhere and on any device.

2.Planning and preparation

Hardware and software requirements

SharePoint Online is a cloud-based service and therefore does not require any special hardware or software to be used. However, there are some requirements that should be met to ensure the best possible user experience.

Regarding the hardware requirements, the user should use a computer or mobile device with an internet connection. It is recommended that the Internet connection has a speed of at least 1 Mbps.

Regarding the software requirements, the user should use one of the following web browsers:

Internet Explorer 11 or higher

Google Chrome (latest version)

Mozilla Firefox (latest version)

Microsoft Edge (latest version)

Safari (latest version)

It is also recommended that the user has the most current version of Office 365 installed to fully benefit from all the features of SharePoint Online.

There are also specific requirements for using SharePoint Online in conjunction with Microsoft Teams. For example, the user should have an up-to-date version of Teams installed and their device should have a camera and microphone to be able to participate in online meetings.

Overall, the hardware and software requirements for using SharePoint Online are relatively modest, and most users should have no problem meeting the prerequisites.

User and site account planning

Planning user and site accounts is an important aspect of managing SharePoint Online. Setting up and managing the right accounts for the right users is important to ensure content and collaboration stays secure and organized.

A first step in planning user and site accounts is to identify the different user roles within the organization. This includes, for example, administrators, authors, readers and guests. Each of these roles has different permissions and access rights that need to be set.

After the user roles have been set, you can start creating user accounts. This can be done either manually or automatically with a connection to an existing user directory (eg Active Directory). It is important that user accounts are secure and unique to ensure only authorized users can access content and collaborate.

Another important step in planning user and site accounts is creating site accounts. These can be created either manually or automatically. It is important for site accounts to be organized and well structured to ensure content is easily accessible and found. It is also important that the correct access rights are set for the site accounts to ensure only authorized users can access the content.

Finally, it is important to regularly monitor and manage user and site accounts to ensure they remain secure and up to date. This includes checking permissions, deleting inactive accounts and performing security checks.

Overall, user and site account planning is an important aspect of managing SharePoint Online and requires careful thought and regular monitoring to ensure content and collaboration remain secure and organized. Setting up and managing the right accounts for the right users is important to ensure only authorized users can access content and collaborate. It's also important for site accounts to be organized and well-structured to ensure content can be easily accessed and found.

Another important consideration when planning user and site accounts is permissions management. SharePoint Online provides granular permissions management, allowing administrators to limit user and group access rights to specific content and functionality. This makes it possible to ensure that only authorized users can access certain content and functions.

Another important consideration when planning user and site accounts is content management. SharePoint Online offers various functions for managing content, such as versioning, release, approval workflows and archiving. These features make it possible to ensure that content stays secure and organized and that only authorized users have access to it.

Overall, user and site account planning is an important aspect of managing SharePoint Online that requires careful thought and regular monitoring to ensure content and collaboration remain secure and organized.

[SharePoint Online organization theme](#)

The design of a SharePoint Online organization refers to the structure and organization of content and sites within a SharePoint Online environment. It includes creating sites and subsites, managing content, and organizing content into folders and libraries.

An important aspect of the design of a SharePoint Online organization is the creation of sites and subsites. This allows content and collaboration to be grouped and organized into logical units. Administrators can create sites and subsites to represent specific projects, departments, or teams.

Another important design aspect of a SharePoint Online organization is the management of content. SharePoint Online offers various functions for managing content, such as versioning, release, approval workflows and archiving. These features make it possible to ensure that content stays secure and organized and that only authorized users have access to it.

Another important design aspect of a SharePoint Online organization is how content is organized into folders and libraries. This allows the content to be grouped and organized into logical units for easier navigation and search. Administrators can create folders and libraries to group and organize specific content.

Overall, the design of a SharePoint Online organization is an important aspect of managing SharePoint Online that requires careful thought and regular monitoring to ensure that content and collaboration remain secure and organized, and that navigation and search are easy for users and is intuitive.

3. Creation and management of SharePoint Online sites

Creating SharePoint Online sites

Creating SharePoint Online sites is an important aspect of administering SharePoint Online. It allows to group and organize the content and collaboration in logical units. There are several ways to create SharePoint Online sites:

Using SharePoint Templates: SharePoint Online provides a number of predefined templates that can be used for different types of sites, such as team sites, project sites, intranet sites, and extranet sites. These templates come with pre-built web parts, layouts, and design elements that can be quickly and easily customized.

Using PowerShell scripts: Administrators can also use PowerShell scripts to create SharePoint Online sites. This makes it possible to create and manage sites in bulk and requires knowledge of the PowerShell language.

Using site creation policies: Administrators can create site creation policies to control how users create websites. These policies may govern the type of site, templates used, features available, and access rights.

Using third-party tools: There are also third-party tools that administrators can use to create and manage SharePoint Online sites. These tools provide additional functionality and make managing SharePoint Online sites easier.

It's important to note that creating SharePoint Online sites involves not only creating the site itself, but also configuring permissions, organizing content, and customizing the theme. Thorough planning and consideration of the site's needs and goals is necessary before beginning construction.

Administer SharePoint Online sites

Managing SharePoint Online sites is an important aspect of managing SharePoint Online. It allows to organize and maintain the content and collaboration on the sites. Here are some of the tasks to consider when managing SharePoint Online sites:

Manage Permissions: It is important to ensure that only authorized users can access and edit the content on the sites. Administrators can manage site-level and item-level permissions to ensure access rights are appropriate.

Manage content: Administrators must ensure that content on sites is current and relevant. This means they need to review and update regularly to ensure content is accurate and consistent.

Customize site design: Admins can customize the design of sites to ensure they meet the organization's needs and goals. They can customize the theme by adding or removing web parts, customizing layouts, and customizing theme elements.

Site retention and deletion: Administrators must ensure that sites that are no longer needed are properly retained or deleted. You can create site retention policies to ensure that site content is properly retained before it is deleted.

Monitor site activity: Administrators should monitor site activity to ensure that it meets the organization's needs and goals. They can monitor site activity by generating reports and checking site logs.

Monitor site availability: Administrators need to ensure that sites are always available and respond quickly to requests. They can monitor site availability by monitoring the performance of the sites and quickly troubleshoot issues that may affect availability. You can also monitor the sites' availability in different regions to ensure that the sites are available to users around the world.

Manage security: Site security is critical to ensure that content and collaboration across sites are safe. Administrators can create and enforce security policies to ensure sites are secure. You can also monitor the security of the sites to ensure that no unsafe activities are taking place on the sites.

Backup and recovery: Administrators must ensure that content and collaboration across sites are secure and can be restored in the event of a failure. You can take regular backups of the sites and provide recovery procedures to ensure that the content and collaboration on the sites can be restored in the event of an outage.

Managing SharePoint Online sites requires a thorough knowledge of the capabilities and capabilities of SharePoint Online and a deep understanding of the organization's needs and goals. Administrators should ensure they have the right tools and processes in place to successfully manage the sites.

Manage SharePoint Online site collections

SharePoint Online site collections are a group of sites organized in a common hierarchy and share common settings and functionality. They allow administrators to consolidate and centrally manage multiple sites for increased efficiency and security.

Creating Site Collections: Administrators can create site collections by creating new sites and incorporating them into an existing site collection, or by creating a new site collection and adding new sites. It is important that site collections are clearly structured for ease of navigation and management.

Assigning Permissions: Administrators can assign permissions at the site collection level to ensure only the required users can access the sites and content. You can also use Role Based Access Control (RBAC) to manage permissions at the site collection level.

Configuring settings: Administrators can configure settings at the site collection level to control the features and functionality of the sites. For example, you can configure search, navigation, security, and collaboration settings.

Manage content: Admins can manage content at the site collection level to ensure content is current and relevant. For example, you can delete, update, or archive content.

Monitoring performance: Administrators can monitor the performance of site collections to ensure that the sites are fast and reliable. You can also monitor the availability of the site collections in different regions to ensure the sites are available to users around the world.

Backup and recovery: Administrators must ensure that content and collaboration on site collections are secure and can be restored in the event of an outage or disaster. SharePoint Online offers built-in backup and restore capabilities that automatically create regular backups and store them in the Microsoft cloud. Administrators can also create manual backups and export them to local storage media. Restores can be performed at the site collection level or at the individual level to undo lost content or changes.

Overall, managing SharePoint Online site collections enables administrators to centrally control the functionality and security of multiple sites and ensure that content and collaboration are always available to users. However, it is important to regularly monitor and tweak site collections to ensure performance and security are at optimal levels.

Delegated Access Rights

Delegated access rights allow administrators to delegate specific tasks and responsibilities to other users without giving them full access to the entire SharePoint Online environment. This can be very useful when an administrator is absent, for example due to vacation or illness, and someone else has to take over the tasks.

In SharePoint Online, administrators can assign delegated access rights in a number of ways, including through:

Role assignment: Administrators can assign users to roles such as site collection administrator, content manager, or user manager that grant them specific permissions.

Assignment of permissions: Administrators can explicitly grant users permissions for certain content or functions, eg read, write or administrator rights.

Access Policy Assignment: Administrators can assign access policies to users, granting them specific permissions for specific periods of time.

It's important that admins carefully consider what permissions they delegate and who gets them. Delegated access rights should only be granted to trusted users who can take responsibility for the tasks and have the necessary knowledge and skills. It is also important to regularly monitor and adjust delegated access rights as necessary to ensure the security and integrity of the SharePoint Online environment is maintained.

Access policies for SharePoint Online sites

SharePoint Online sites offer several ways to manage access policies. This includes managing user accounts and permissions, setting up access groups and creating access rules.

An important aspect of managing access policies in SharePoint Online is managing user accounts and permissions. Administrators can create, edit, and delete user accounts and assign them permissions that allow them access to specific SharePoint resources. This can be done either by granting global permissions for the entire site, or by granting permissions for specific resources such as lists, libraries, or documents.

Another important tool for managing access policies in SharePoint Online are access groups. Access groups allow administrators to assign users specific permissions that they need for specific tasks or roles. For example, a content management access group can be created that gives members write access to specific lists and libraries, while another user account management access group can be created that gives members access to manage user accounts.

Another way to manage access policies in SharePoint Online is to create access rules. Access rules allow administrators to determine who can and cannot access certain resources. This can be done either through the use of user accounts or access groups. For example, an access rule can be created that only allows members of a specific access group to access specific lists and libraries.

Overall, SharePoint Online sites offer many ways to manage access policies to ensure only authorized users can access the appropriate resources. By managing user accounts and permissions, setting up access groups, and creating access rules, administrators can customize access control to a very granular level, ensuring only authorized users can access specific resources. It is also possible to propagate and override access policies to sub-sites or sub-libraries to simplify access policy management.

Another important concept related to access policies in SharePoint Online is the use of something called "SharePoint Security Groups". These groups allow administrators to assign users or groups to a specific role that contains specific permissions. There are predefined security groups like "Owners", "Members" and "Visitors" that already have certain permissions.

It's important to note that managing access policies in SharePoint Online is closely tied to managing user accounts and groups in Office 365. Changes to user accounts and groups in Office 365 are automatically reflected in SharePoint Online and vice versa.

In summary, SharePoint Online sites offer extensive opportunities to manage access policies to ensure only authorized users can access the appropriate resources. It allows administrators to

customize access control at a very granular level by managing user accounts and permissions, creating access groups, and creating access rules.

4. Content Management

Manage documents and libraries

Managing documents and libraries in SharePoint Online enables organizations to centrally store, organize, and share their documents and other digital resources. SharePoint Online offers a variety of tools and features that allow administrators and users to manage documents and libraries.

One of the most important features related to managing documents and libraries in SharePoint Online is the creation and management of libraries. Libraries are special folders in SharePoint Online used for storing and sharing documents. You can create libraries to organize specific types of documents, such as contracts, financial documents, or project documents. Within a library, admins and users can upload, download, edit, share, and organize documents.

Another important concept related to managing documents and libraries in SharePoint Online is the use of metadata. Metadata is information associated with and describing a document. In SharePoint Online, administrators can create metadata fields to describe documents such as author, date, document type, etc. This metadata can be used to organize and search for documents.

Another important tool for managing documents and libraries in SharePoint Online is versioning. With versioning, administrators and users can track changes to documents and revert to previous versions if necessary.

In summary, SharePoint Online offers a wide range of options for managing documents and libraries. With the creation and management of libraries, the use of metadata and versioning, administrators and users can organize, share and secure documents.

Manage lists and tables

Managing lists and spreadsheets in SharePoint Online enables organizations to centrally store, organize, and share their data. SharePoint Online offers a variety of tools and features that allow administrators and users to manage lists and spreadsheets.

One of the most important functions related to managing lists and tables in SharePoint Online is the creation and management of lists. Lists are special folders in SharePoint Online used for storing and

sharing data. You can create lists to organize specific types of data, such as contacts, tasks, or events. Within a list, administrators and users can add, edit, delete, and organize data.

Another important concept related to managing lists and tables in SharePoint Online is the use of columns and data fields. Columns and data fields are the fields that store the data in a list or table. In SharePoint Online, administrators can create columns and data fields to describe data such as name, phone number, email address, etc. These columns and data fields can be used to organize and search for data.

Another important tool for managing lists and tables in SharePoint Online is using views. Views allow administrators and users to customize and filter the way data is displayed in lists and tables. For example, you can create a view that only shows dates that fall within a specific date range.

In summary, SharePoint Online offers extensive possibilities to manage lists and tables. By creating and managing lists, using columns and data fields, and using views, administrators and users can organize, share, and filter data.

Manage web parts

Managing web parts in SharePoint Online enables administrators and users to customize and extend the content and functionality of a SharePoint site. Web parts are small applications that can be placed on a SharePoint site and allow specific functionality and content to be created or displayed.

One of the most important features of managing web parts in SharePoint Online is the ability to add or remove web parts. Administrators can select web parts from a variety of pre-installed web parts or create and add custom web parts. You can also remove web parts that are no longer needed.

Another important feature when managing web parts in SharePoint Online is the ability to change web part settings. Each web part has a set of settings that determine how the web part works and how it is displayed. Administrators and users can change these settings to tailor the web part to their needs.

Another feature of managing web parts in SharePoint Online is the ability to rearrange the arrangement of web parts on a page. Administrators can move web parts around a page to customize the arrangement of content and functionality. You can also resize web parts to adjust their display.

An important concept when managing web parts in SharePoint Online is the ability to configure and connect web parts. Administrators can configure specific web parts to interact with other web parts

on the page or even on other pages of the site. You can also connect web parts to transfer data from one source to another web part.

In summary, managing web parts in SharePoint Online enables administrators and users to customize and extend the content and functionality of a SharePoint site. You can add, remove, and configure web parts, rearrange web parts, customize web part settings, and connect web parts to transfer data from one source to another web part. There is also the ability to control permissions for using specific web parts by granting or revoking access to specific web parts to specific users or user groups. It is important that admins regularly monitor and manage the web parts on their site to ensure

Manage content types and columns

Managing content types and columns in SharePoint Online enables administrators and users to customize the way content is organized and managed on a SharePoint site. Content types and columns are two important concepts in SharePoint that allow content to be organized and categorized in a meaningful way.

A content type is a type of content that can be created in SharePoint. Examples of content types are documents, appointments, tasks, and contacts. Content types define the fields and properties required for a specific content type. For example, a document content type may contain fields such as title, author, and creation date, while an appointment content type may contain fields such as date, time, and location. Administrators can create new content types, edit existing content types, or delete them.

A column is a field that can be added to a content type to store additional information. Examples of columns are the Department or Priority fields. Columns can also be used to control how content is displayed and sorted. Admins can create new columns, edit or delete existing columns, and move columns between content types.

Another important feature of managing content types and columns in SharePoint Online is the ability to control permissions for using specific content types and columns. Administrators can control which users or user groups have access to specific content types and columns. This makes it possible to increase security and privacy and ensure that only authorized users have access to certain content.

In summary, managing content types and columns in SharePoint Online allows administrators and users to customize the way content is organized and managed on a SharePoint site. It allows creating, editing, and deleting content types and columns, organizing and categorizing content, controlling how content is displayed and sorted, and controlling permissions for using specific content types and columns. This allows administrators to ensure that website content and functionality is up-to-date, relevant and secure. It is important to regularly monitor and manage the content types and columns on the site to ensure

Manage Content Policies

Managing content policies in SharePoint Online allows administrators to control the way content is organized and managed on a SharePoint site and ensure that it conforms to company policies and regulations.

A content policy is a collection of rules and restrictions that apply to the management of content on a SharePoint site. Examples of content policies are document naming rules, tagging rules, and content sharing rules. Administrators can create, edit, or delete content policies and apply them to specific content types, libraries, or lists.

An important feature of managing content policies is the ability to monitor policy compliance. SharePoint Online offers various tools and reports to help administrators monitor compliance and identify problems. Examples of these tools are document naming reports, tag usage reports, and content sharing reports.

Another important concept in managing content policies is the ability to take automated actions when a policy is violated. Examples of automated actions are sending a notification to the administrator, moving content to a quarantine folder, or deleting content.

In summary, managing content policies in SharePoint Online allows administrators to control the way content is organized and managed on a SharePoint site and ensure that it conforms to corporate policies and regulations. It allows content policies to be created, edited, and deleted and applied to specific content types, libraries, or lists. It also provides the ability to monitor policy compliance and take automated actions when a policy is violated. It's important to note that only administrators can create and manage content policies, and they can only be applied to specific areas of a SharePoint site.

Another way to manage content policies is by using SharePoint workflows. A workflow is an automated chain of processes that can be applied to a specific content type or library. For example, workflows allow administrators to automate that a document is automatically routed to a specific person or group for approval, or that a document is automatically moved to a specific folder if it contains specific tags.

Overall, managing content policies in SharePoint Online is an important part of managing content on a SharePoint site. It enables administrators to ensure compliance with company policies and regulations and to identify and resolve problems faster. It also allows for the automation of processes and compliance with standards for organizing and managing content.

5. Management of search and navigation

Configure search functions

In SharePoint Online, administrators can configure search functionality to ensure users get the results they want. One of the ways to configure the search features is to configure search indexing. This includes selecting the content to be indexed and configuring indexing rules to ensure the most relevant results are displayed.

Another way to configure the search features is to optimize the search user experience. This includes configuring search suggestions, displaying search results, and the ability to filter and sort results. It's also possible to create custom search web parts and extensions to optimize the search experience for specific user groups or scenarios.

Another way to configure the search features is to configure the security of the search. This includes configuring access rights to search results and the ability to exclude specific user groups from searches. It is also possible to create search policies to ensure that certain content cannot be searched.

Overall, configuring search functionality in SharePoint Online allows administrators to streamline the search experience for users and ensure that the most relevant results are displayed. It also enables search to be tailored to specific user groups or scenarios, and to comply with corporate search policies and regulations.

Configure navigation options

In SharePoint Online, administrators can configure navigation options to ensure users can easily access the content they want. One of the ways to configure the navigation options is to design the structure of the global navigation. This includes configuring the hierarchy of navigation items and the ability to add or remove custom navigation items.

Another way to configure navigation options is to design local navigation on a specific site or area of the page. This includes configuring the hierarchy of navigation elements within a specific site or area of the page and the ability to add or remove custom navigation elements.

Another way to configure navigation options is to configure search navigation. This includes configuring search navigation to ensure users can easily access the results they want, as well as the ability to add or remove custom search navigation items.

Overall, configuring navigation options in SharePoint Online allows administrators to streamline user navigation and ensure users can easily access the content they want. It also enables customization of navigation for specific user groups or scenarios and compliance with corporate navigation policies and regulations.

Manage search schema and policies

Managing search schema and policies in SharePoint Online allows administrators to customize and optimize search functionality to improve the user experience and the accuracy of search results.

One of the ways to manage the search schema is to configure the schema of the search index fields. This includes configuring the fields to be indexed and the ability to add new fields or remove existing fields.

Another way to manage the search schema is to configure search relevancy. This includes configuring the rules and algorithms used to determine the relevance of search results, as well as the ability to add custom relevance rules or remove existing rules.

Another way to manage the search schema is to configure the search suggestions. This includes configuring the rules and algorithms used to generate search suggestions, as well as the ability to add custom suggestion rules or remove existing rules.

Another way to manage the search schema is to configure the results of the search. This includes configuring the rules and algorithms used to generate search results, as well as the ability to add custom result rules or remove existing rules.

By managing search schema and policies in SharePoint Online, administrators can improve the search experience for users and ensure that search results are accurate and relevant. It also enables search to be tailored to specific user groups or scenarios, and to comply with corporate search policies and regulations.

6. Security and Access Rights Management

Configure security policies

Configuring security policies in SharePoint Online enables administrators to control access to content and functionality on the SharePoint site and to increase the security of the data.

One way to configure security policies is to manage user and group permissions. This includes assigning permissions to individual users or groups at the site, list, library, and individual document and folder level. Administrators can also set up the ability for users to set up and manage permissions for their own documents and folders.

Another way to configure security policies is to manage access policies for external users. This includes assigning access permissions to users located outside of the corporate network and using authentication and authorization methods such as single sign-on (SSO) or two-factor authentication.

Another way to configure security policies is to configure the use of data encryption and backup. This includes using encryption technologies such as SSL/TLS to protect data transmission, as well as configuring backup policies to ensure important data is backed up on a regular basis.

Another way to configure security policies is to configure the use of compliance and privacy policies. This includes compliance with legal and industry-specific data security requirements, such as compliance with the General Data Protection Regulation (GDPR).

By configuring security policies in SharePoint Online, administrators can ensure that data on the site is secure and that access to that data is controlled and proportionally controlled. In addition, administrators can ensure that the website and the data stored on it comply with legal and industry-specific requirements by using compliance and data protection guidelines.

Another way to configure security policies is to control access to certain site features. For example, administrators can determine which features are available to certain groups of users or which features are enabled on certain pages of the website.

Another way to configure security policies is to configure the use of auditing and logging features. This allows administrators to monitor and log activity on the website to identify and address potential security issues or abuse at an early stage.

It is important to note that security policy configuration is an ongoing process and should be reviewed regularly to ensure that the policies are always up to date and the security of the data on the SharePoint site is maintained.

[Configure authentication methods](#)

Configuring authentication methods in SharePoint Online allows administrators to determine the method by which users can access the site and its content. SharePoint Online supports different types of authentication, such as:

Password-based authentication: This is the default method where users log in with their username and password.

Federated Authentication: This allows users to log in using an external authentication system, such as Microsoft Azure Active Directory.

Single Sign-On (SSO): This allows users to sign in to multiple applications with a single set of credentials, rather than signing in to each application separately.

Multi-Factor Authentication (MFA): This requires users to authenticate themselves with an additional factor, such as a code sent via SMS or call, to ensure that they are in fact the legitimate user.

Forms-Based Authentication (FBA): This allows admins to create a custom login page for users to enter their credentials.

It is important to note that the choice of authentication method also affects users' permissions and access rights to the website. Administrators should ensure that they choose the right method to ensure the security of the site and its content while ensuring user experience.

[Configure access rights](#)

In SharePoint Online, administrators can configure user and group access rights to ensure only authorized individuals can access specific content and functionality. There are different types of access rights that can be configured, such as:

Read Permissions: This allows users to read content but not edit or delete it.

Editing Rights: This allows users to read and edit content but not delete it.

Full Access Rights: This allows users to read, edit, and delete content.

No Access Rights: This denies users access to certain content or features.

Administrators can configure access rights in a number of ways, such as:

At the site level: This allows administrators to configure access rights for the entire site.

At the library or list level: This allows administrators to configure access rights for a specific library or list.

At the item level: This allows administrators to configure access rights for a specific item such as a file or folder.

At the group level: Administrators can configure access rights at the group level, giving users access rights to specific content or features associated with a specific group of users.

It is important to note that the choice of access rights also affects the security of the website and its content. Administrators should ensure that they configure the correct access rights to ensure the security of the website and its content while ensuring user experience.

Configure user profiles

User profiles in SharePoint Online allow administrators to store and manage important information about users needed to collaborate and access content. These profiles contain information such as the user's name, email address, and photo, as well as their department and job title.

To manage user profiles in SharePoint Online, administrators must first configure user profile management permissions. This can be done through the SharePoint Management Console or the SharePoint Management Shell.

Once configured, administrators can add, edit, and remove user profiles. You can also add and manage custom fields to store additional information about users.

It is also possible to configure synchronization of user profiles with an external source such as Active Directory or another user database. This allows user profile information to be automatically updated and maintained without an administrator having to do it manually.

It is also possible to control the visibility of user profiles for specific users or groups. This can be achieved by configuring user profile access rights.

In summary, user profiles in SharePoint Online enable administrators to store and manage important information about users required for collaboration and access to content. These profiles can be added, edited and removed, custom fields can be added and synced, and user profile visibility can be controlled.

7. Management of workflows and automated processes

Configure workflow automations

SharePoint Online provides the ability to automate workflows to support business processes and save time and resources. To configure workflow automations, there are a few steps you need to follow:

Create a new workflow template or use an existing template. SharePoint Online offers a number of predefined workflow templates such as approval workflows, information collection workflows and many more.

Configure the settings of the workflow. Here you can define the steps of the workflow, the participants and the conditions that must be met for the workflow to be triggered.

Connect the workflow to a list or library. You can link the workflow to a specific list or library so that it is automatically triggered when a new item is added or changed.

Test the workflow to ensure it works as expected.

Publish the workflow to make it accessible to other users.

It's important to note that only users with appropriate permissions can create, configure, and publish workflows. It is also important to regularly monitor and maintain workflows to ensure they are always working properly.

Configure process policies

Configuring process policies in SharePoint Online relates to the management of business processes and workflows within a SharePoint site or portal. To configure process policies, there are a few steps you need to follow:

Identify the business processes for which process policies should be created. This can be, for example, the approval of documents, the creation of projects or the management of customer inquiries.

Create process guidelines. SharePoint Online provides the ability to create process guidelines using workflows that map the steps of the business process.

Link the process policies to the appropriate lists and libraries. You can associate process policies with specific lists or libraries so that they are automatically triggered when a new item is added or changed.

Test the process policies to ensure they are working as expected.

Publish the process guidelines to make them available to other users.

It's important to note that only users with appropriate permissions can create, configure, and publish process policies. It is also important to regularly monitor and maintain process policies to ensure they are always working properly.

There is also the option to use Power Automate (formerly known as Microsoft Flow) to create and automate process policies. Power Automate offers more flexibility and advanced capabilities compared to SharePoint Online's workflows. It allows you to automate processes that span multiple applications and services, and also offers the ability to create processes with complex conditionals and loops.

[Manage workflow history](#)

Workflow history management in SharePoint Online refers to the monitoring and management of workflow activities that have been performed in the past. This includes viewing details about the workflows that have been applied to a site and being able to review the results of the workflows and correct them if necessary.

An administrator can manage workflow history in a number of ways, depending on the tools and capabilities of SharePoint Online. One way is to use workflow history management in the SharePoint admin console. Here the admin can get an overview of all the workflows running on the site including details like the name of the workflow, the start and end time and the status of the workflow.

Another option is to use PowerShell cmdlets to manage workflow history. For example, the administrator can use these cmdlets to export workflow activities for further analysis in an external application.

There is also an option to manage workflow history using third-party tools. These tools allow the administrator to monitor and manage the workflow history in a user-friendly manner and provide additional features such as notifications, reporting and analysis.

It is important to note that managing workflow history in SharePoint Online is an important part of overall site management and helps maintain efficiency and accuracy of workflows.

8. Monitoring and Troubleshooting

Configure monitoring options

SharePoint Online offers several ways to configure monitoring of the site and its content. This includes:

Activity Logs: With SharePoint Online activity logs, you can monitor and track activity on your site, such as who performed what actions on what item.

Notifications: Notifications allow you to let users know when something has changed on the site. You can set up notifications for specific actions or changes.

Auditing: SharePoint Online provides an auditing feature that allows you to record user activity on your site. This can be used to ensure policies and processes are being followed.

Site content monitoring: With site content monitoring, you can define what content on the site should be monitored and who should receive notifications when that content changes.

Security Monitoring: SharePoint Online provides security monitoring that you can use to monitor the security of your site and identify potential threats.

To configure these monitoring options, you must open the appropriate settings in SharePoint Online Settings and enable or configure the required options. It is recommended that you familiarize yourself with the various monitoring options beforehand to ensure you configure the correct settings for your specific needs.

Manage logs and reports

There are several ways to manage logs and reports in SharePoint Online. Some of these possibilities are:

Audit logs: SharePoint Online automatically logs activities such as content creation, modification, deletion, and access to content. These audit logs can be accessed through the SharePoint admin console or the SharePoint Online PowerShell module.

User Activities: SharePoint Online also provides the ability to log user activities such as the number of pages viewed, the length of sessions, and the number of documents uploaded. These user activities can be obtained from the SharePoint admin console or the SharePoint Online PowerShell module.

Reports: SharePoint Online also provides various reports related to site usage, site performance, and site availability. These reports can be accessed through the SharePoint admin console or the SharePoint Online PowerShell module.

Notifications: SharePoint Online also offers the possibility to set up notifications when certain actions are performed. For example, an administrator can receive a notification when a user deletes a specific folder or file.

Data protection: SharePoint Online also offers the possibility to configure data protection options to ensure data security. For example, an administrator can limit the logging of certain activities or exclude certain users from logging.

Troubleshoot problems

Troubleshooting problems in SharePoint Online can be challenging as there can be many different factors that can cause problems. One of the first steps in troubleshooting is to pinpoint the problem. This can be done by collecting information such as error messages, logs and reports.

Once identified, the problem can be fixed by applying troubleshooting methods like using troubleshooting tools, performing maintenance or updating drivers and software.

It may also be helpful to communicate with other users or SharePoint Technical Support for additional assistance. There are also many resources on the Internet, such as forums, maintained by SharePoint users that can be helpful in finding solutions to common problems.

Some of the most common issues in SharePoint Online are performance issues, availability issues, security issues, and usability issues. It is important to perform regular maintenance and install the latest security updates and patches to avoid performance and security issues.

It is also important to ensure that the SharePoint environment is configured correctly and that users have the correct access rights to avoid usability issues.

Overall, troubleshooting issues in SharePoint Online is an ongoing process aimed at improving the performance, availability, security, and usability of the SharePoint environment. It requires regular maintenance, applying troubleshooting methods, and communicating with other users and SharePoint technical support.

9. Upgrades and Migrations

Upgrade to newer versions of SharePoint Online

Upgrading to a newer version of SharePoint Online is usually done automatically by Microsoft and typically requires no manual action on the part of users or administrators. Microsoft typically plans and rolls out upgrades in stages to ensure users experience the transition as smoothly as possible.

However, there are some steps administrators can take to ensure the upgrade is successful and avoid potential problems. This includes:

Check compatibility: Make sure that all add-ons, third-party tools, and custom solutions you use are compatible with the new version of SharePoint Online.

Test the new version: Create a test environment where you can try the new version of SharePoint Online before implementing it in production.

Check user permissions: Make sure all users have the required permissions to access the new version of SharePoint Online.

Document the changes: Document any changes made by the upgrade so you can track them in case of problems.

Communicate with users: Inform users ahead of time about the upcoming upgrade and keep them updated during the process.

Make a backup: Back up all important data before upgrading so that you can recover in case of a problem.

Monitor the transition: Monitor the transition to the new version of SharePoint Online and fix any issues that arise as quickly as possible.

Migrate from older versions of SharePoint Online

Migrating from older versions of SharePoint Online to a newer version requires thorough planning and preparation. There are different methods to perform a migration such as using third party tools or moving content manually.

An important preparation is to make an inventory of all existing content, such as document libraries, lists, web parts and settings. This helps identify content that needs to be migrated to the new environment and content that may no longer be needed.

Another important step is analyzing the existing environment and identifying potential problems that may arise during the migration. This may include identifying custom solutions that are not supported in the new version or identifying incompatibilities between versions.

Once the preparations are complete, the actual migration can begin. There are various tools and methods that can be used to perform the migration. Some options are:

Third-party tools: There are many third-party tools that have been developed to help migrate from SharePoint Online. These tools typically provide a user-friendly interface that allows selecting content to migrate and performing the migration automatically.

Manually move content: Another method is to manually move content. This usually requires more work as each piece of content has to be manually moved between versions. However, this method is useful when there are no third-party tools that meet the specific needs, or when there are specific migration needs that are not supported by a tool.

After the migration, it is important to verify that the new environment is working properly and to ensure that all the content and functionality you need has migrated properly and that no data has been lost. It is also important that users' access rights and permissions have been configured

correctly and that the workflows and processes used on the old environment have been properly transferred to the new environment. It can also be helpful to provide training for users to ensure they are fully acquainted with the new environment.

Migrate from other document management systems to SharePoint Online

When migrating from other document management systems to SharePoint Online, there are a few steps and considerations to follow to ensure a smooth and successful transition.

Planning: Before you start the migration, you should create a detailed plan. This should include the type of data to be migrated, the amount of data, the destination list or library in SharePoint Online, access permissions, and expected downtime.

Preparation: Before you start the migration, you should make sure that you have the necessary tools and applications to successfully migrate the data. SharePoint Online supports various methods for data migration, such as the SharePoint migration tool, third-party tools, or PowerShell scripts.

Data migration: After the preparations are complete, you can start the actual data migration. This step can take a different amount of time depending on the size and type of data being migrated. It is important that you monitor the progress bar and error logs to ensure that data is migrated successfully.

Testing and post-processing: After the migration is complete, you should verify that the new environment is working properly and that all data has been migrated correctly and that access permissions are properly configured. If necessary, you can now do post-processing such as adding metadata or customizing columns.

User training and support: After the migration, it is important that all users understand the new environment and how to work with it. Training and support for users can help ensure the migration is successful and increase adoption of the new system.

10. Advanced Configurations

Configure SharePoint Online integrations

SharePoint Online offers a variety of ways to integrate with other systems and applications. One of the most common methods is using SharePoint connectors and apps that allow importing and

synchronizing data and content from other sources such as OneDrive, Microsoft Teams, Outlook, OneNote, PowerApps, Power Automate and many others.

Another option is to use SharePoint web parts, which allow embedding content and functionality from other applications directly on a SharePoint page. There are a variety of preconfigured web parts available that are optimized for integration with various applications, such as integrating calendars, social media feeds, videos, and more.

Another option is to use SharePoint REST APIs and SharePoint Add-ins, which allow external applications to access and control SharePoint data and functionality.

Another option is to integrate SharePoint Online with other cloud services such as Azure Active Directory, Power BI, Logic Apps and many others. Various tools and services are available for this purpose, which facilitate integration, such as Azure AD Connect, Azure Information Protection, Azure Logic Apps and many others.

It is important to note that the configuration of SharePoint Online integrations depends on many factors such as the type of integration, the type of data and content to be migrated, security requirements, and many others. Thorough planning and preparation are therefore essential to ensure that the migration is carried out successfully and that the integrated systems and applications function properly.

[Configure SharePoint Online custom solutions](#)

SharePoint Online offers developers the ability to create and implement custom solutions to better meet the needs of their organizations. These custom solutions can come in the form of add-ons, web parts, workflows, event receivers, and others. To configure a custom solution in SharePoint Online, there are several steps to follow:

Create a project in Visual Studio by selecting a SharePoint template.

Add the required components such as web parts, workflows, event receivers, etc.

Create a package (.wsp) file that contains the custom solution.

Upload the WSP file to the SharePoint admin center and install the custom solution.

Configure the custom solution according to your organization's needs.

Activate the custom solution on the sites or lists you want.

Test the custom solution to ensure it works as expected.

It is important that developers follow SharePoint developer guidelines and best practices to ensure custom solutions are stable and secure. It is also important that regular maintenance is performed to ensure the custom solutions remain compatible with new SharePoint versions.

[Configure SharePoint Online Power Automate workflows](#)

SharePoint Online provides the ability to configure Power Automate workflows to run processes automatically. This can be used, for example, to automatically approve documents, send notifications or transfer data to other applications.

To configure a Power Automate workflow in SharePoint Online, you must first choose a new workflow template or create a custom solution. You can then define the steps of the workflow and set up the required actions and rules. This includes, for example, creating variables, adding conditions and configuring loops.

You can also create custom actions to retrieve or transfer data from other applications. You can use the Power Automate connections that are already available or create your own connections.

It is important to test the workflows regularly and review the execution logs to ensure they are working as expected. Also, the workflows should be regularly maintained and adjusted to ensure that they are always up-to-date and meet current requirements.

[Configure SharePoint Online Power Apps](#)

When configuring Power Apps in SharePoint Online, one can create different types of apps based on the needs of the business and users. Power Apps allow users to create and use custom apps to automate tasks like collecting data, managing to-do lists, and running business processes.

A first step in configuring Power Apps in SharePoint Online is setting up a Power Apps environment. This environment contains the necessary resources and services required to build and manage Power Apps.

You can then create a new app either by using an existing template or by creating an empty app and configuring it manually.

Once the app is created, you can customize it by adding custom fields, rules, actions, and connections. It is also possible to integrate the app with other tools and services such as Microsoft Power Automate or Microsoft Power BI to automate workflows or data analysis.

Finally, you need to deploy and publish the app to SharePoint Online for users to consume. It is important to regularly monitor and maintain the app to ensure it is working properly and meeting requirements.

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