EMPOWERING SEAMLESS COLLABORATION

A SharePoint Guide

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Seamless collaboration across your organisation

No matter what industry or sector you work in, communication plays a vital role in achieving success. How information is stored, managed, and communicated across your organisation is key. Yet, many large and small businesses struggle with the process. This is where SharePoint can help.

SharePoint is a knowledge, document and collaboration management tool developed by Microsoft. It acts as an intranet, document store and content management solution that is used for internal purposes to help bring an organisation together. Forming a core part of Office 365 and Microsoft 365, it provides a wide range of functionality to aid seamless collaboration across an organisation.

At Bridgeall, we believe SharePoint should form part of any document management and collaboration approach and we'll explain why in this guide. Whether you're considering a move to SharePoint or you're already using the platform, we'll highlight its transformative features and the potential impact it can have on your business.

What this guide covers	Taking SharePoint to the next level
› An introduction to SharePoint	› SharePoint Syntex
› SharePoint functionality	› Automation
› SharePoint lists	› Microsoft Viva
› Strategy and governance	› Case studies
› The business benefits	
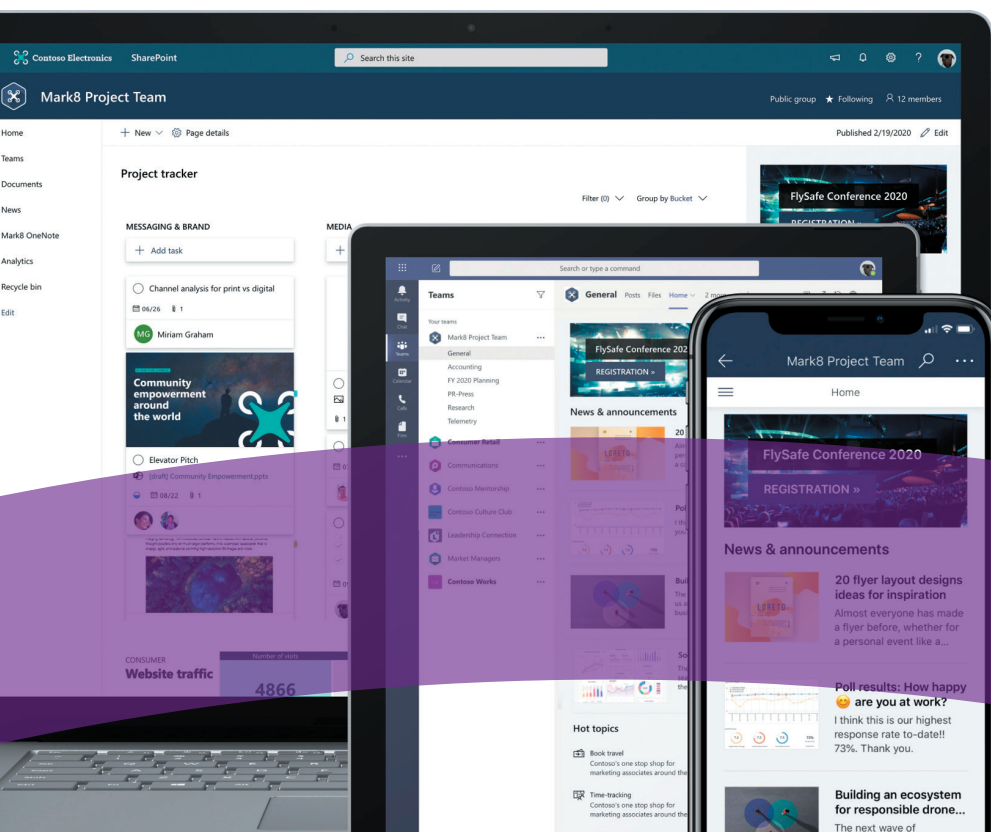
An introduction to SharePoint

At its core, Microsoft SharePoint is a browser-based collaboration and document/ data management solution, designed to connect your employees and business resources together. Ultimately, it's a platform that allows everyone in an organisation to collaborate and synchronise daily business tasks and responsibilities.

Part of the Office 365 suite, it works by creating a secure site that can be used to store, share, access and organise information. This site acts as your team's private directory for hosting all documentation or projects, greatly simplifying the collaboration process.

There are a multitude of things you can do with the platform but typically, it is used for one or more of the following purposes:

Essentially, SharePoint can be what you want it to be. It's a highly flexible and complex platform so it can be developed to whatever solution you require. For a web-based collaboration platform, SharePoint is easy to build, maintain, and at its fundamental level, easy for business users to understand. It is also infinitely customisable and massively scalable. There are many ways businesses can utilise the platform to realise increased productivity and return on investment.

SharePoint functionality

SharePoint gives users instant access to people, applications and content. It allows you to spend less time searching for information and more time working with it. We explain more about the functionality and what your organisation can expect by implementing the platform.

Document management and file sharing

While the uses of SharePoint vary from business to business, most organisations use SharePoint to store documents in a shared space instead of one location such as a shared drive. The documents feature allows anyone in your organisation to access documents depending on the access rules of that SharePoint site.

You can also keep track of any changes within a document with document versioning. SharePoint's Version Control functionality is enabled by default, meaning new versions are added to the item's history once the changes are saved. This allows users to view and recover previous versions and means that the latest version is always available for users.

Document retention

Microsoft 365 offers retention capability across the platform, and this can be applied to SharePoint documents and List items as well as Teams documents and chats. Retention can be based on several triggers such as date created, date modified date labelled and triggered by events. It further allows you to report on labelled content and see what labels are being used and what kind of data is being stored.
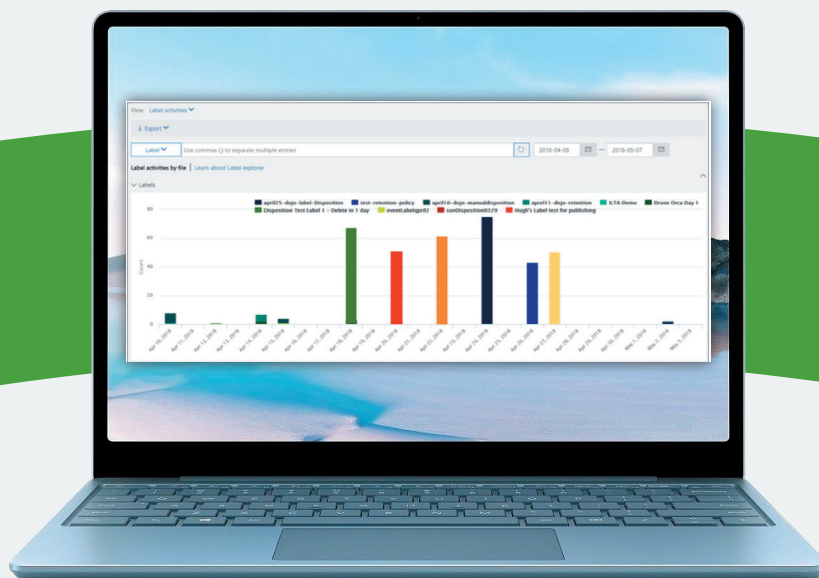
Improving collaboration

SharePoint simplifies collaboration by providing tools that are just as effective as the communication and interaction of workers in an office space. Multiple people can work on documents together in real time, speeding up document creation across several people.

Users can also see other contributor changes in real-time, speeding up the creation of documents and content.

Company intranet

SharePoint can be used to establish a company intranet where your employees can locate a variety of information such as, announcements, the latest news, policies and procedures and more. With a wide range of templates to choose from, users can create an intranet [or internal internet system] which works like any other website.

Let's take this intranet example on the left. This communication site is designed to be the place where your employees can find the news and resources they need, plus personalised content tailored just for them.
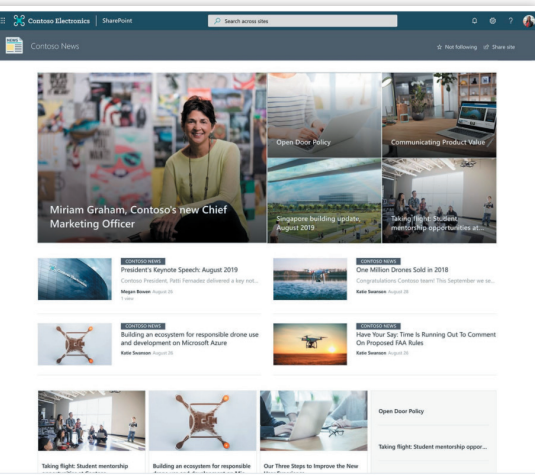
Social and collaboration features

The social and collaboration features on Hub Sites and Team sites in SharePoint make it easy for users to find and connect with people and content that matters to them. On Hub Sites and Team sites, the interactive newsfeed can help users keep up to date with people and content through real-time messages and status updates.

Personal features

Microsoft Delve [formerly My Sites] also acts as a central location where users can track their tasks and access the documents and sites they are following or document that other members of their team or project group are working on.

This helps users find documents based on work they are currently involved in or from people within their Team.

Automated workflows

Streamline and automate a wide variety of business processes with Power Automate [formerly SharePoint workflows]. These pre-programmed mini applications are designed to save you time and effort, and to bring consistency and efficiency to tasks that you perform on a regular basis. Let's take an Approval workflow as an example.

An Approval workflow routes a document or other item to designated people for their approval or rejection. You can also use an Approval workflow to control content approval in a list or library.

When you use the SharePoint document approval workflow to run the process, all the checking, tracking, reminding and forwarding is done by the workflow, automatically. If someone is late in completing a task, the included workflows generate a notification to let you know about it.
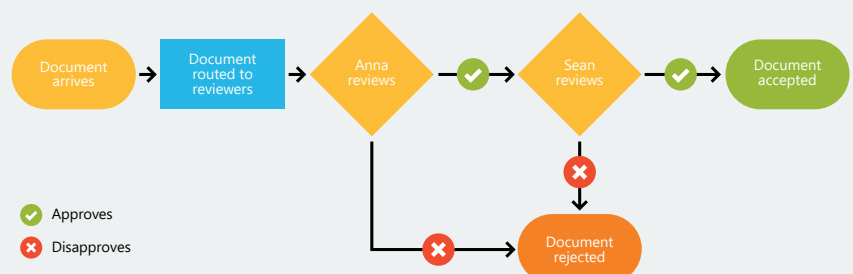
SharePoint Lists

SharePoint Lists can also help to manage information. They are an easy and secure way of storing information in list form. SharePoint Lists are accessible to multiple users simultaneously for collaborative work. Lists can include people, links, pictures, dates and more. They also have the following useful features, including versioning so you can track the history of a list item.

| Filtering | Views | Unique permissions | Integration options | Conditional formatting | Versioning |
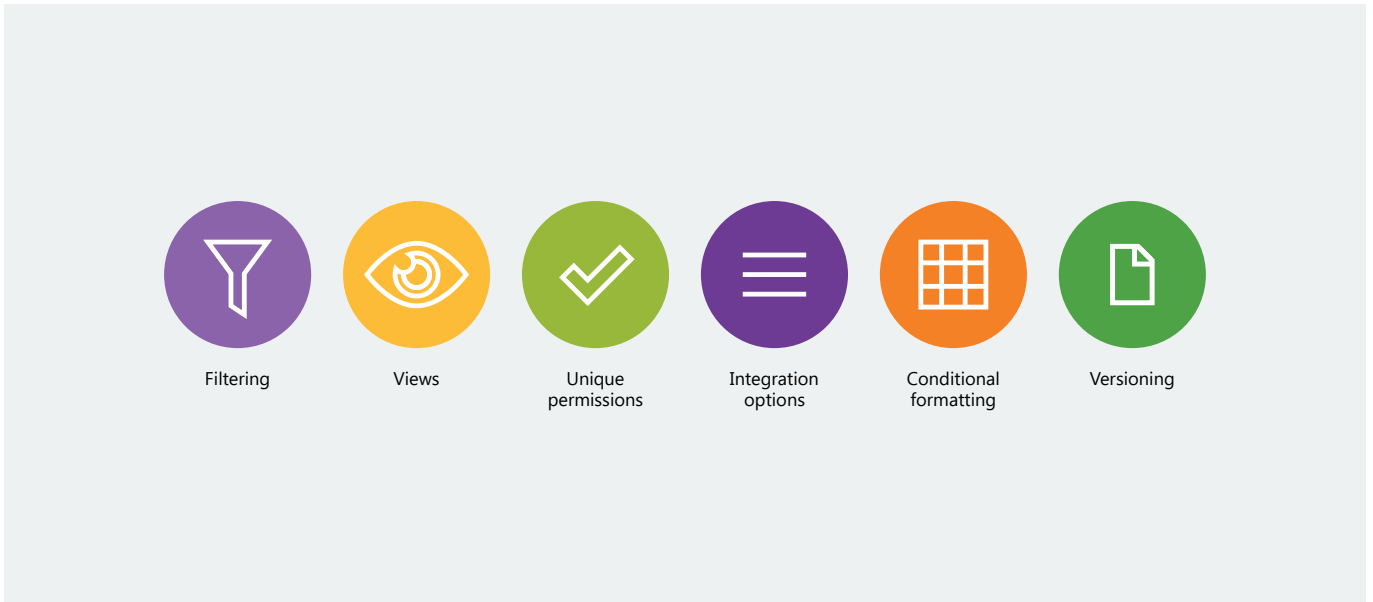
A good way to think about SharePoint lists is instead of storing documents, you are storing an entry of data made up of multiple different columns. Often, users who maintain tracking spreadsheets can benefit from converting these to Microsoft Lists to take advantage of the functionality they offer.

SharePoint Strategy/Governance

If you're unfamiliar with the subject of governance, it is the set of policies, roles, responsibilities, and processes that control how an organisation's business divisions and IT teams work together to achieve its goals.

Each organisation has its unique needs and goals that influence its approach to governance. Larger organisations will probably require more detailed governance when compared to smaller businesses. Too often, many organisations have no governance around the SharePoint process, which can lead to a very large volume of site collections and eventually to a support issue.

When it comes to it a good governance plan can:

› Streamline the deployment of products and technologies, such as SharePoint.

› Help keep your organisation's system secure and compliant.

› Help ensure the best return on your investment in technology.

An effective governance plan anticipates the needs and goals of your organisation's business divisions and IT teams. As every enterprise is unique, here are some best practices that we would recommend.

Determine initial principles and goals

The governance committee should develop a governance vision, policies, and standards that can be measured to track compliance and to quantify the benefit to your organisation. For example, your plan should identify service delivery requirements for both technical and business aspects of your SharePoint deployment. Who can create SharePoint sites? How and when do you retire SharePoint sites?

Manage the creation of sites

When it comes to managing the creation of sites, we recommend the following:

› Create a process for new SharePoint sites and new Team Sites.

› Restrict the creation of these to a service account, or a small group of users.

› Use existing tools such as MS forms, Teams and Power Automate to automate the process.

› Apply sensible naming to new Teams and SharePoint sites so they can be identified.

› Gather the business justification and put the creation through an approval process.

Gather information	Get business justification	Control the naming	Create consistency

Classify your business information

Organise your information according to an existing taxonomy or create a custom taxonomy that includes all the information that supports your business solution. After your information is organised, design an information architecture to manage it. Then, determine the most appropriate IT services to support it.

Labelling

SharePoint allows you to use labels to control aspects of a document or list items lifecycle. This determines how long the item should be retained for, when it should be disposed of and whether it should be editable or read-only for the duration.

It also allows you to label items with a [Sensitivity label] that controls the classification of the item within the organisation. This allows you to control the flow of the item both within the organisation and outside the organisation. Some example scenarios could be only certain staff members are allowed to see items marked as [Sensitive], or staff cannot send [Top Secret] document to external users via e-mail.

Develop an education strategy

A comprehensive training plan should show users how to use SharePoint according to the standards and practices that you are implementing and explain why those standards and practices are important. After all, if your staff don't know why its been implemented, what it does or how to use it, then how can you expect it to be organised, maintained and add value to your business? Your plan should cover the kinds of training required for specific user groups and describe appropriate training tools. You should also highlight specific resources and support available to anyone who may require it further down the line.

Successful governance is ongoing, and an active effort should be made to review new requirements in the governance plan.
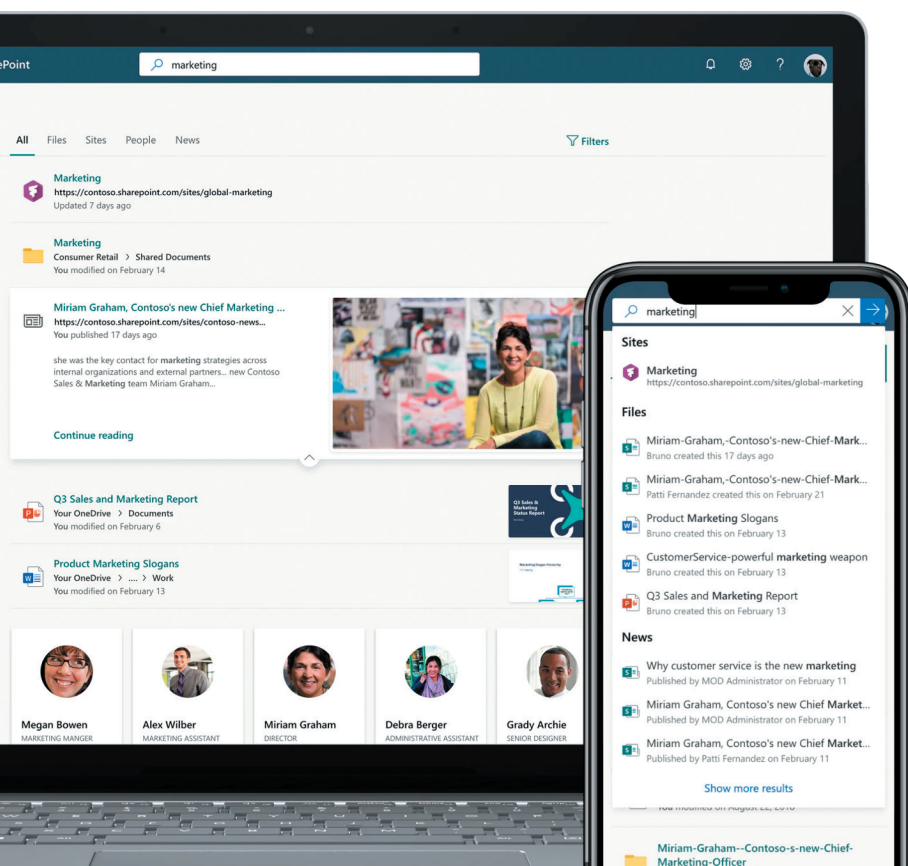
Business benefits of SharePoint

So far, we have covered what SharePoint is, what it does and how to best implement it. Microsoft SharePoint is truly more than just a storage hub and has many components. Let's have a look at these features and see what it can really do for your organisation.

Cost effective

When using SharePoint Online you only pay for what you use. The solutions and functions are both flexible and scalable so you can scale up or down at a moment's notice without having any upfront IT costs. SharePoint licenses also help you to reduce and control costs associated with expensive licensing fees. It is also included in Office 365 and Microsoft 365 licenses.

Access from anywhere

Not in the office? Not a problem. With remote working becoming more popular than ever, SharePoint is designed for anywhere access which ensures your staff stays productive regardless of where work takes them.

Access from anywhere does not mean you have to compromise on security. Microsoft provides best-in-class security such as multi factor authentication and conditional access policies. For users that still need to access information from on-premises resources there is also functionality to create a gateway to these from SharePoint.

Easy collaboration

SharePoint provides a unified content hub. Instead of information being distributed across departments, team members gather in real-time to get things done using the same business applications they would use in the office every day.

Enterprise-grade security and compliance

Security and compliance can prove to be costly for small businesses, yet it is a requirement.

Many small businesses use SharePoint because it provides access to enterprise-grade security and compliance without the excessive costs. Full control of your information and documents come as standard with SharePoint, with little set up. Any sensitive information is embedded into the document to prevent unauthorised access.

Constant access to updates

With SharePoint Online, there is no need to purchase a new license when new upgrades are released. SharePoint customers automatically have access to the latest updates. To keep up to date on any changes, users can decide if they want to be the first to get any updates.

Integration with wider Microsoft suite

Full integration with Teams, OneDrive, Dynamics 365, Power Platform and other Microsoft 365 applications comes as standard. Let's take Microsoft Teams as an example, when you create a Team, Microsoft Teams will automatically create a shared site in SharePoint for your group to work on. Everything that you share within your Team channel, is also shared to your SharePoint site automatically so you'll never need to scroll back through an old conversation to find that one document or image that was shared.
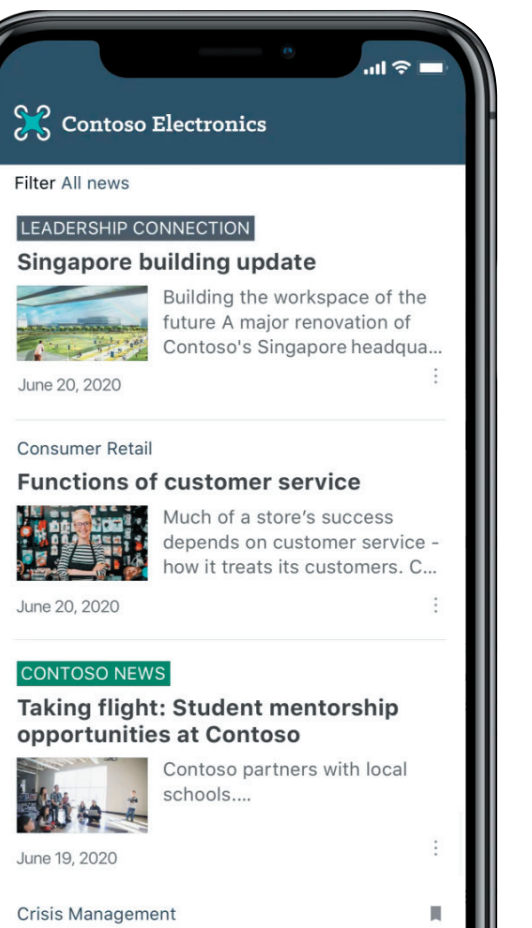
Taking SharePoint to the next level

Looking ahead, there are several applications that combine as part of the Microsoft 365 ecosystem to take SharePoint to the next level. From automation with SharePoint Syntex, building custom apps with the Power Platform, to empowering employees with Microsoft Viva. We take a look at how these tools work together to ensure you maximise the value of your SharePoint environment.

SharePoint Syntex

Microsoft SharePoint Syntex uses advanced AI and machine teaching to amplify human expertise, automate content processing, and transform content into knowledge.

Based on the leading content services of SharePoint, Syntex introduces a new experience for managing content at scale, integrating metadata and workflow, and delivering compliance automation - the content center. Content centers supply capabilities to teach the cloud how to read and process documents the same way you would manually.

SharePoint Syntex uses those insights to automatically recognise content, extract important information, and apply metadata tags. In addition, you can track the effectiveness of your models with integrated visual analytics.

Here are just some of the features:

AI-powered machine teaching
Build no-code AI models that teach the cloud to read content the way you do.

Content processing
Automate the capture, ingestion, and categorisation of content and streamline content-centric processes using Power Automate.

Streamlined content processes
Integrate with Power Automate to build workflows that leverage extracted metadata.

Content protection and management
Enforce your security and compliance policies with automatically applied sensitivity and retention labels.

Content understanding
Create AI models that capture expertise to classify and extract information and automatically apply metadata.

Enriched content and metadata
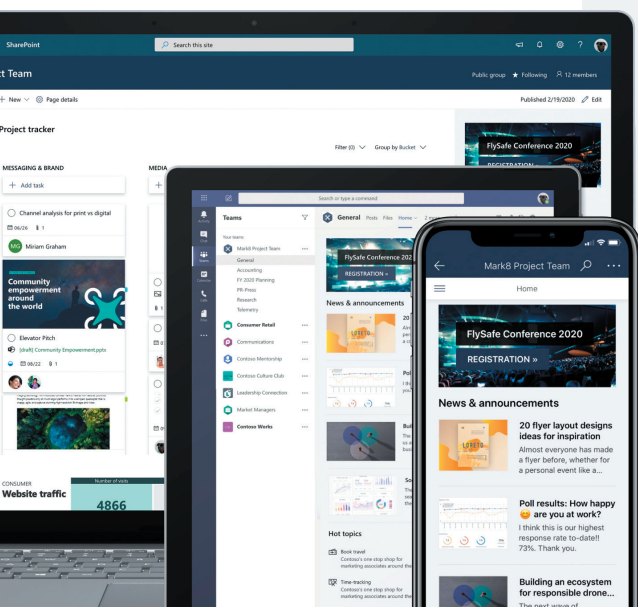Find key facts in your content to improve search and teamwork.

Automatic content classification
Use advanced AI to capture and tag structured and unstructured content.

Content compliance
Manage content inside and outside of Microsoft 365 to improve security and compliance with integrated MIP sensitivity and retention labels.

Power Platform

The Power Platform is Microsoft's combined term for Power BI, Power Apps, and Power Automate [previously known as Microsoft Flow]. Individually, these applications fulfil specific business needs, but together they provide a powerful platform for people to easily access, analyse, act on, and automate their data.

Business professionals that want to integrate Sharepoint with Power Platform can do so easily. The integration gives them the power to sync all data, connect deeply into apps, and configure flexible workflows.

1. Power BI

With Power BI, you can build powerful drag-and-drop reports and dashboards in minutes. You can also combine multiple data sources into one data model, which allows you to see the complete picture in a specific business area or across your entire organisation. You can host these on SharePoint and integrate them with SharePoint files like excel and lists.
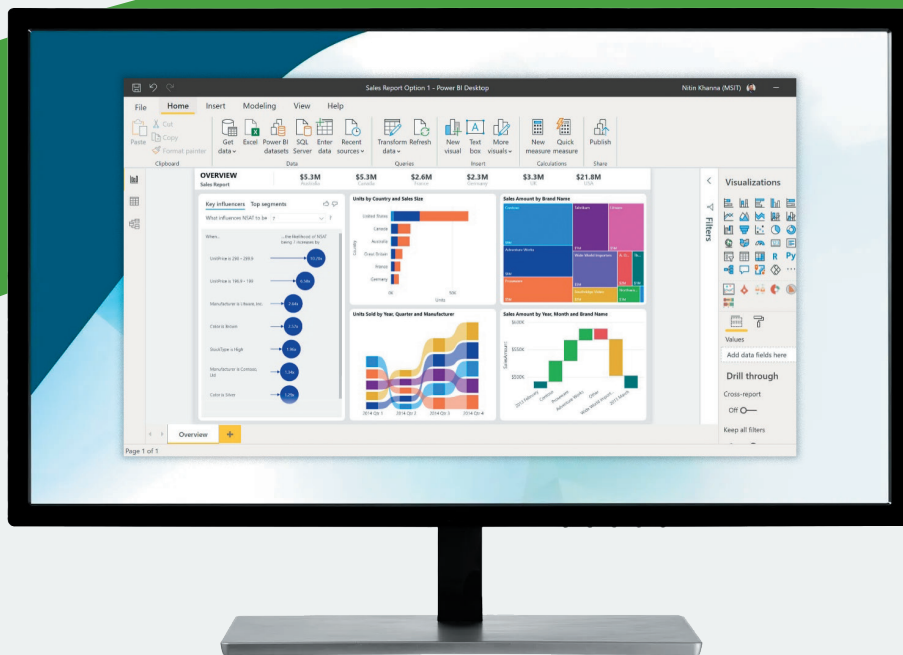
2. Power Apps

Power Apps is a low-code, sometimes no-code solution for simple custom app development. It can empower business users to quickly create a tablet- or mobile-friendly app to solve a specified business problem.

Power Apps again can be easily based on SharePoint lists and interact with documents and files stored within SharePoint. Power Apps is a great way of taking and providing information between users and the core documents and sources within your organisation.
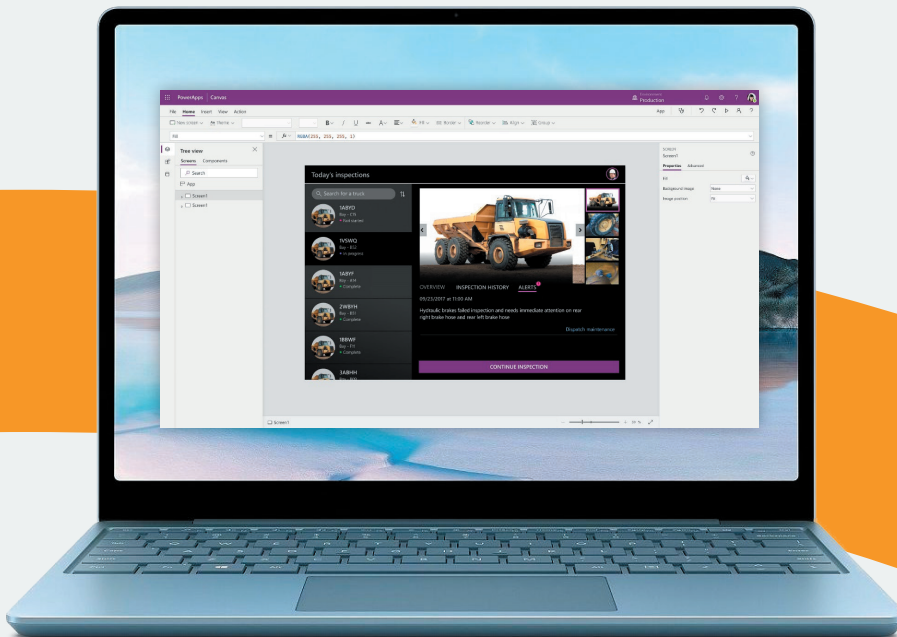
3. Power Automate

Previously known as Microsoft Flow, Power Automate allows you to create automated workflows between Microsoft services or other third-party applications. You can think of Power Automate as your personal assistant - making quick work of repetitive manual tasks.
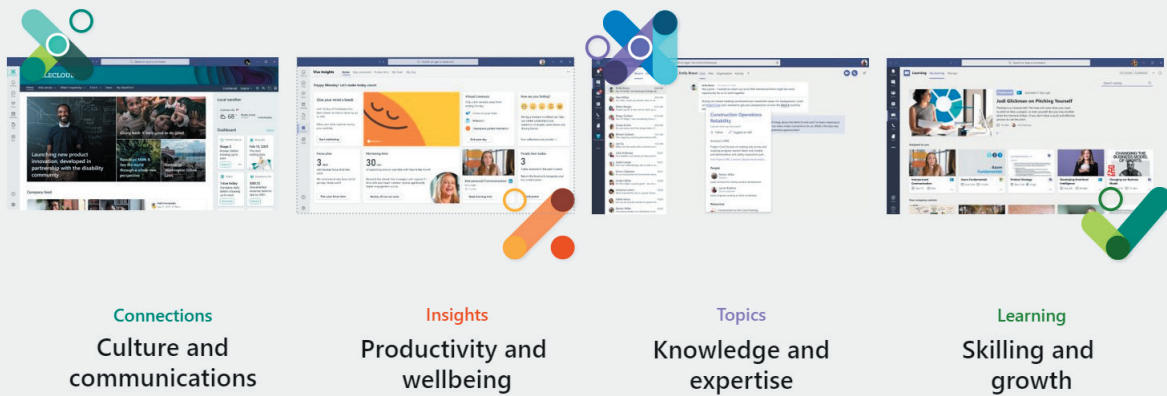
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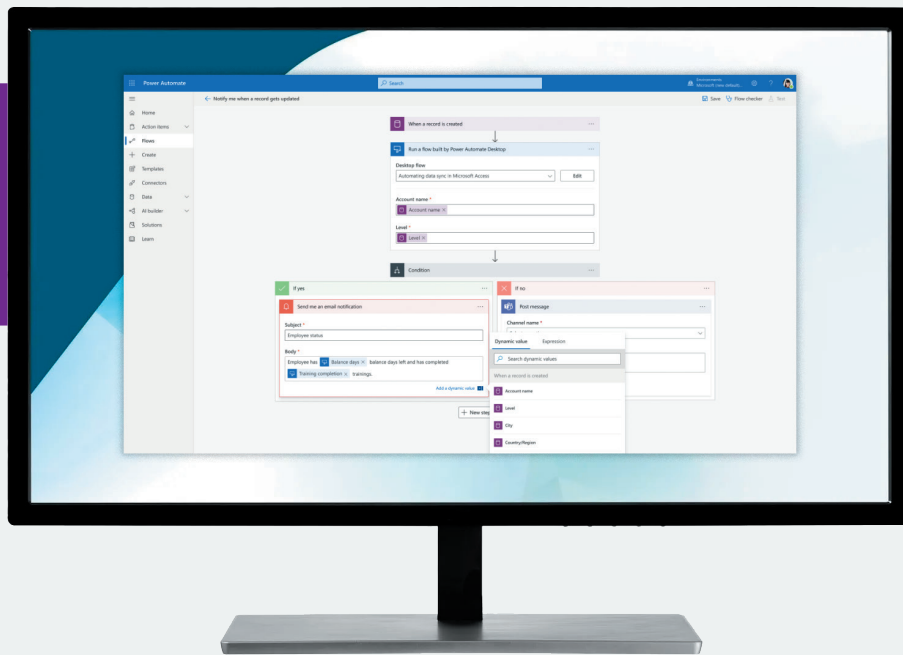
Microsoft Viva

Microsoft Viva, a brand-new solution to empower employees, support remote working and enhance wellbeing. This platform is yet another development in the future of the modern workplace. Bringing tools for employee engagement, learning, wellbeing and knowledge discovery directly into the Microsoft 365 apps your staff work with every day. Viva is embedded across the Microsoft 365 suite and is integrated with Microsoft Teams and SharePoint.

Split into four modules: Connections, Insights, Learning and Topics, Viva is geared at making teamwork better.

Connections
Culture and communications

Insights
Productivity and wellbeing

Topics
Knowledge and expertise

Learning
Skilling and growth

Viva Connections

Viva Connections is all about ensuring your employees stay engaged with your company. It has been described by Microsoft as the "gateway to a modern employee experience." Designed with the modern world of work in mind, it allows employees to stay informed no matter where they are working.

Powered by SharePoint, it gives people a curated, company-branded experience on a custom feed of news, announcements and conversations. The personalised dashboard connects individuals to company tools and resources across the digital workplace, keeping everyone in the company engaged.

Viva Insights

With people adapting to new ways of working, the importance of organisations looking after their staff is paramount. After all, a happy team is a productive team. This is where Viva Insights comes in. Available to download as an app in Teams, Viva Insights gives individuals, managers, and leaders personalised and actionable insights that help them and their teams to be at their best at work. To protect privacy, personal insights are visible only to the individual.
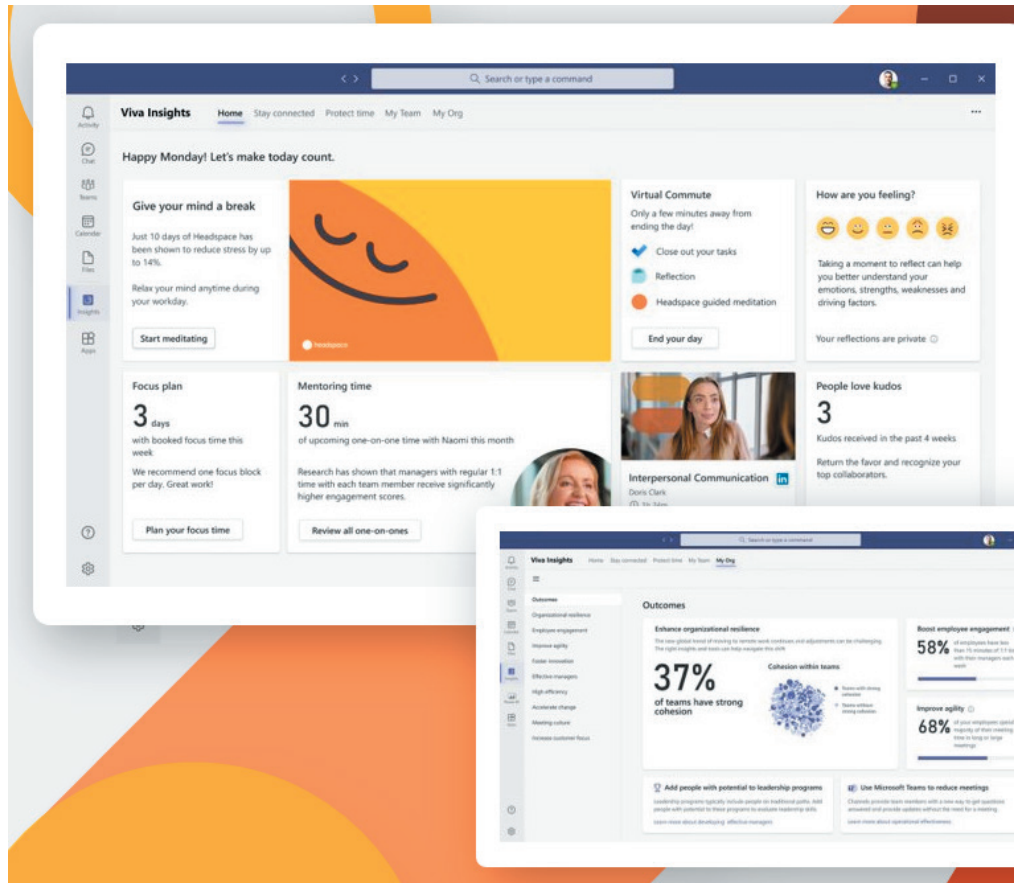
Viva Learning

Gain new skills and contribute to the ongoing success of your organisation with opportunities provided by Viva Learning. It will aggregate lessons from sources around the web that your teams are already familiar with, like LinkedIn Learning, Microsoft Learn, and Coursera.

Individuals will be able to organise and share lessons as they would with any other type of content, in Teams chats, channels, and tabs, which they are already using to collaborate every day. Teams and groups of people can also organise their own learning tab with customised, relevant learning content.

Viva Topics

Empower your staff with knowledge and expertise, Viva Topics uses AI to provide relevant information on different subjects without the need for searching or switching between apps.

When Viva identifies a topic within a M365 app such as Teams, it automatically collects and curates content from across your systems into a Topics Page. Here, staff will be able to easily access information such as:

› The definition of the topic

› Recommended and suggested people to contact

› Key documents relevant to the topic

› Related sites and teams

› Related topics
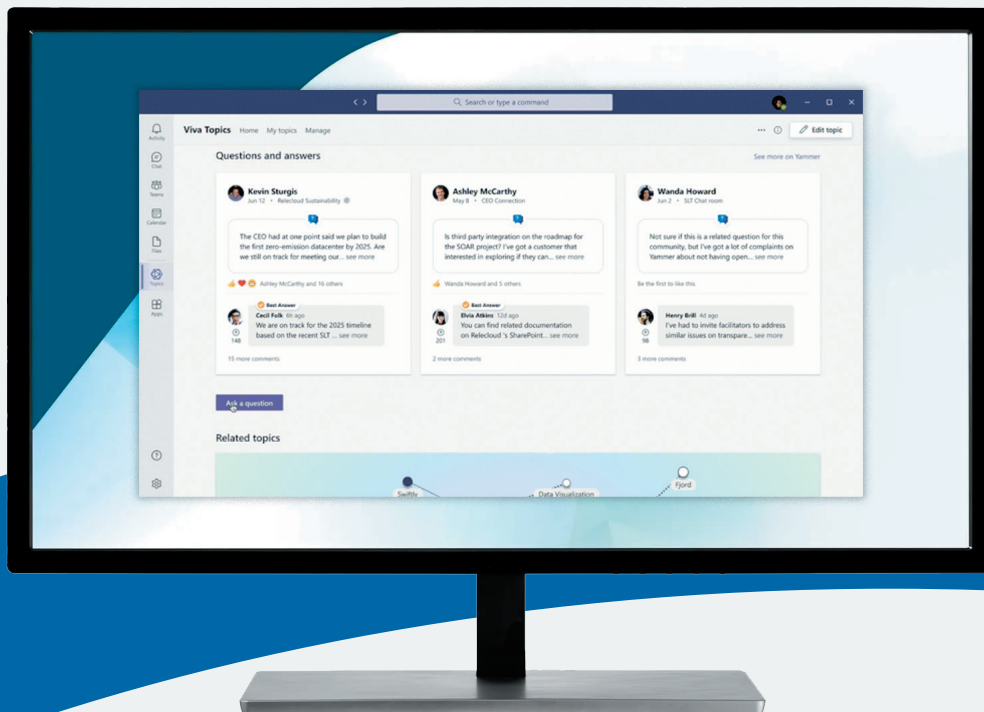
Case studies

Wheatley Group

With an annual turnover of £350m, Wheatley Group owns/manages over 93,000 homes across 18 local authority areas. It is one of the largest and most dynamic housing, care and property management groups in the UK with a strong track record of innovation.

Bridgeall worked in close partnership with the internal management team responsible for the implementation of the Group's Digital Strategy underpinning its 2020-2025 Vision - "Inspiring Ambition, Unleashing Potential". This involved the delivery of O365, Microsoft Teams governance and implementation & SharePoint implementation and adoption services.

Forest Research

Forest Research is the UK's principal organisation for forestry research. The organisation is internationally renowned for the provision of evidence and scientific services in support of sustainable forestry.

The organisation had an urgent requirement for a new intranet to support its digital transformation journey. Bridgeall successfully engaged with the internal Forest Research management team to deliver a modern SharePoint intranet including design, build, CMS, collaborative spaces, document management, governance, migration plan and post-launch support.

Our team were able to deliver a solution that helped transform collaboration within the organisation through SharePoint. We also provided governance and guidance around Office 365, Microsoft Teams and SharePoint usage, to help keep processes streamlined and easy to manage.

What's next?

SharePoint - Briefing

Get started with a SharePoint briefing. Our Microsoft certified consultants will focus on your requirements and discuss how SharePoint could benefit your business.

FIND OUT MORE

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Since 2003 Bridgeall has delivered advisory, development, implementation and support services to our clients on 100's of successful projects. We're a multiple Microsoft Accredited Gold Partner and ISO9001, IS027001 and Cyber Essentials accredited.

WE'LL HELP YOU BUILD YOUR MODERN INTELLIGENT WORKPLACE QUICKLY AND SECURELY.

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