



Train Your SharePoint Users

- Make sure your team of SharePoint users know how to use SharePoint effectively
- Training your team can boost productivity, reduce errors, improve collaboration, and help cut down on duplicating files

Tip: Not sure where to start with training? We offer The SharePoint Starting Point: The Basics as a public and private class.

Version Control

- Easily identify who made changes and restore older versions of your files by enabling version history
- Version control ensures everyone on your team is working with the latest version of a document or file

Metadata

- Use metadata tags (e.g. Department, Document Type, Last Modified Date) to more easily find content and manage access to content
- Avoid relying solely on folder structures; use metadata instead

Tip: Metadata can be utilized to trigger workflows or other automated tasks

The Search Bar

- Use the search bar to find files by name or metadata
- Use filters to narrow your search by file type or modified date

Tip: Use double quotes to search for exact phrases, e.g. "Product Sales Report July 2025"

Sharing Documents

- Instead of attaching files in emails and Teams messages, share the direct link to the file in SharePoint
 - This reduces the chance of duplicating files or working from outdated versions of your files
- You can opt to share the link with specific people within your organization only



Creating New Documents

- Name documents clearly and according to your organization's policies
- Take advantage of SharePoint's built-in templates

Permissions

- Site owners should review and manage permissions regularly
- Avoid giving users permissions that are not needed; this minimizes your security risk

Governance Policies

- Define clear policies for your SharePoint sites
- Establish clear roles and responsibilities for your SharePoint users and owners
- Create security protocols and ensure your organization is compliant

Housekeeping

- Regularly update SharePoint users of any changes or updates
- Keep your sites clean and organized
- Archive old content regularly

Tip: Select the same time period on a yearly basis for cleaning up and archiving content

Great Canadian Training offers several [SharePoint courses](#), available as public and private training:

Interested in the basics for SharePoint site users? We offer [The SharePoint Starting Point: The Basics](#)

Want to improve your file management across SharePoint, Teams, and OneDrive? Take [Microsoft 365 Integrating with OneDrive, Teams, and SharePoint](#)

Need SharePoint site owner training? Register for [SharePoint Site Owner Essentials](#)

Looking to delve deeper into file management, retention policies, and compliance? Take [Advanced SharePoint Site Management for Owners](#)