

#### IN THIS CHAPTER

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

## Chapter **1**

# Getting to Know SharePoint

**W**hen 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 couldn't figure out exactly what it was or how to get started working with it.

After years of working with SharePoint, we have finally figured a few things out. SharePoint is a web-based software platform that is 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 will likely get ten different answers. SharePoint has such depth 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 an understanding of 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 Microsoft 365. The easiest way to get started is to sign up for a free trial of Microsoft 365. Here's how:

**1. Open your favorite web browser and go to [www.office.com](http://www.office.com).**

The Office home page appears, as shown in Figure 1-1. Note that Microsoft is rebranding the Office web application as the Microsoft 365 Copilot app. The clients themselves are still part of the Office suite of products.

**2. Click the Get Microsoft 365 button.**

To get SharePoint, you will need a business plan subscription.

**3. Click the For Business tab to see the available business plans.**

The table that appears shows that the Microsoft 365 Business Basic plan includes the SharePoint service and is \$6 per month as of this writing (see Figure 1-2).

**4. Once you've chosen the plan you want, click the "Try free for one month" link.**

A welcome screen appears that asks for your information.

**5. Walk through the wizard, providing your information as needed to get up and running with Microsoft 365 and SharePoint Online.**

Once you have filled out the information, your free trial will be created. This can take a few minutes. Once it is created, you will be given a link to go to your Microsoft 365 dashboard.

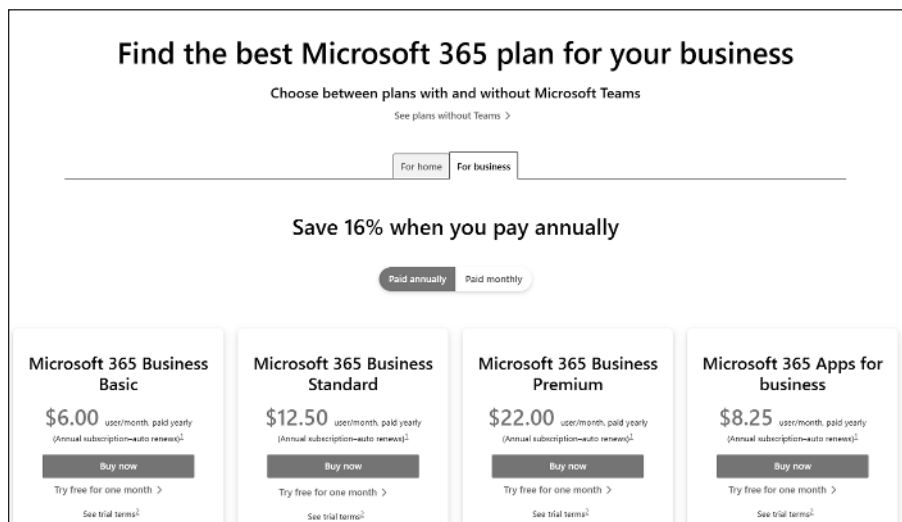


TIP

Note that you can use your own name as a business name and choose that your business size is one person. You will then choose a domain name, which is <your choice>.onmicrosoft.com. This is your Microsoft 365 domain. In our example, we chose [sharepointfordummies.onmicrosoft.com](http://sharepointfordummies.onmicrosoft.com) for our domain. You can always add a custom domain later if you prefer.



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



**FIGURE 1-2:**  
Choosing a  
Microsoft 365  
business plan.

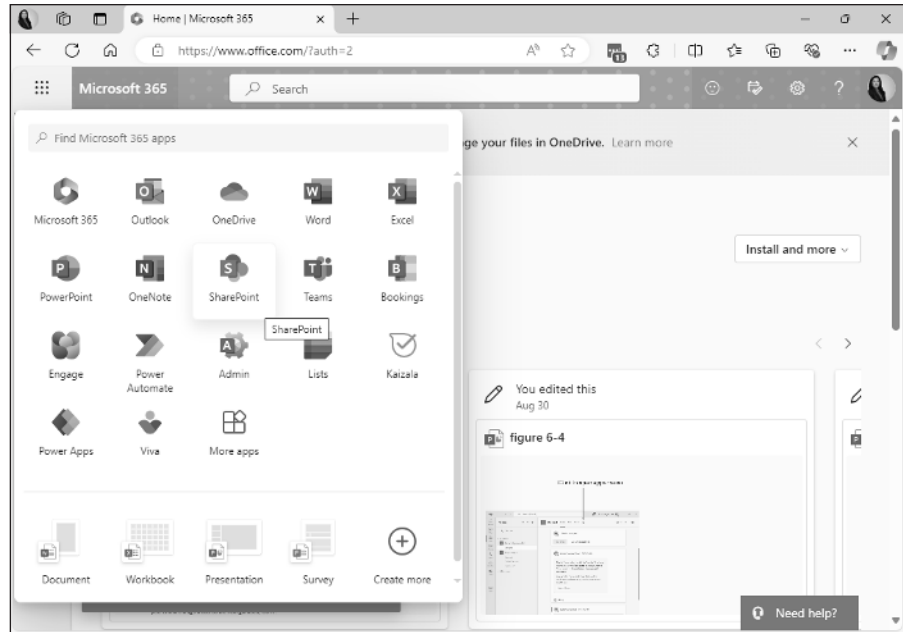
When you first land on your Microsoft 365 dashboard, you will see a quick tutorial and then be presented with the Microsoft 365 main landing page. Because we are focused on SharePoint, here's how to crack it open and get started:

- 1. Click the Microsoft 365 app launcher icon in the top-left corner of the screen and select SharePoint in the drop-down menu that appears, as shown in Figure 1-3.**

After you finish a short tutorial, a welcome screen for SharePoint appears with information on how to create your first site, create a post, or install the SharePoint Mobile App. Right now, we just want to create a SharePoint site.

## 2. Click the **Create Site** tab at the top of the page.

You can create a Team site or a Communication site. Chapter 6 explores the different types of sites. For now, the Standard Team site will suit our purpose.



**FIGURE 1-3:**  
Selecting  
SharePoint  
from the main  
Microsoft 365  
landing page.

## 3. Choose **Team site**, choose the **Standard team template**, and select **Use template**.

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 (see Figure 1-4).

## 4. Give the new site a name and description.

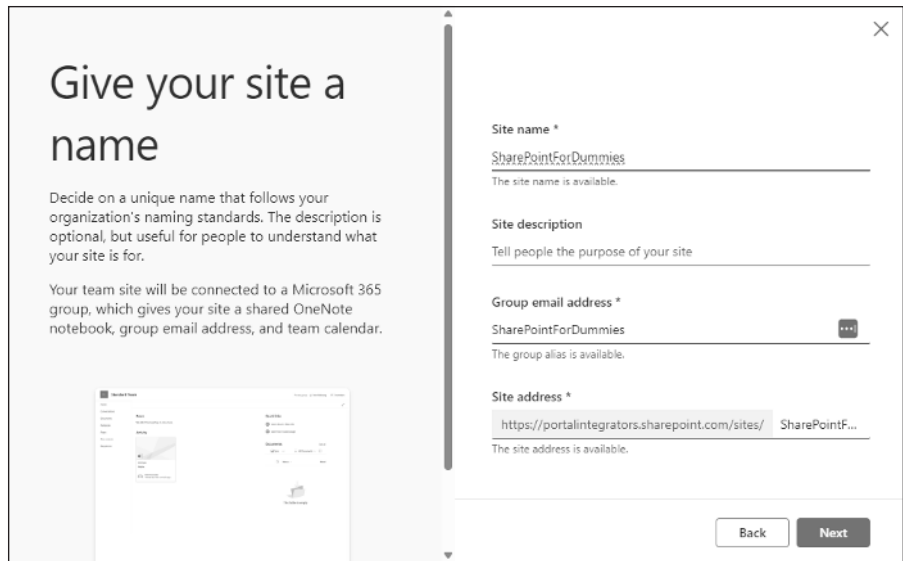
Once you enter the site name, it is validated to see if it is available.

## 5. Click **Next to move forward and set Privacy settings and a language**.

In the Privacy Settings field, you can choose to make the site private, so only members can access it, or public, so anyone in the organization can.

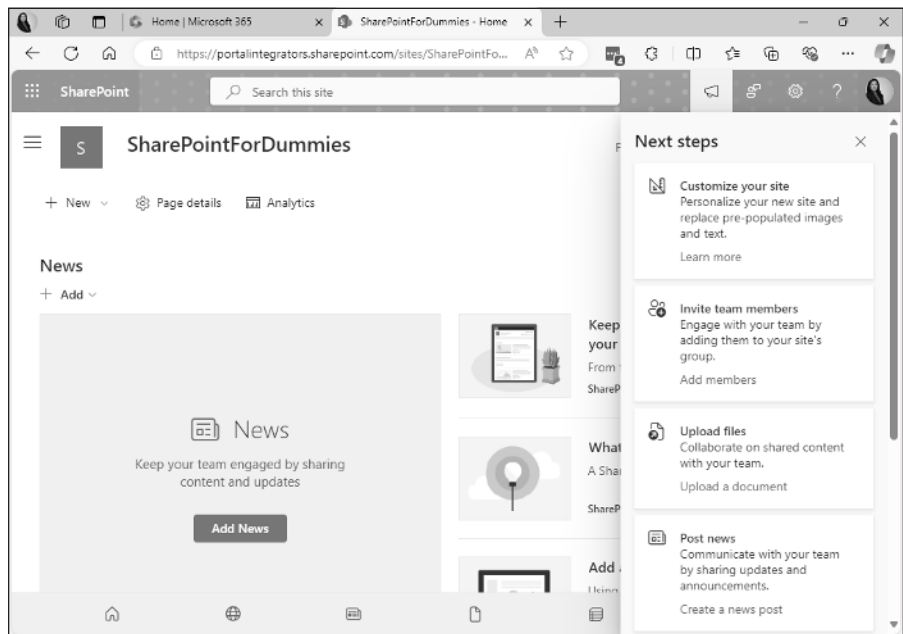
## 6. Click **Create Site to start creating the new site**.

While the site is being created, you are able to add any additional owners or members of the Team site. In our case, we are the only users of our new Microsoft 365 subscription right now, so we click Finish.



**FIGURE 1-4:**  
Creating a new  
SharePoint site.

Congratulations! Just like that, you are up and running with your very own SharePoint site (see Figure 1-5).



**FIGURE 1-5:**  
A new SharePoint  
Team site.



TIP

You can always get back to your Microsoft 365 dashboard and your SharePoint site by opening your web browser, going to `www.office.com`, and logging in with the user you created. Note that the new site can take up to 2 hours to appear in your frequent sites list. Alternatively, you can type in the full web address of your new SharePoint site. In our case, the web address is `https://portalintegrators.sharepoint.com/sites/SharePointForDummies`.



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

## Wrapping Your Head Around SharePoint

At a basic level, SharePoint is a *web-based software platform*, meaning that it is software designed for you to interact with it using a web browser. However, there are also mobile apps for SharePoint for mobile devices.



TIP

In early versions of SharePoint, you had to use Microsoft's web browser (back then it was Internet Explorer) to work with SharePoint. Times have changed, though, and you can now use almost any web browser to work with SharePoint. Best yet, Microsoft supports the browsers and doesn't care what operating system you are using. Prefer to use a Mac? No problem. Is Linux your thing? SharePoint is supported.

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!

## 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 with Office, you can create your own mobile apps with Power Apps, create an online gallery of PowerPoint slides, display interactive spreadsheets on web pages, create rich forms with Microsoft Forms, integrate data from all over the Internet into dashboards using Power BI (one of the business intelligence services from Microsoft), and reuse information from your company's databases in Word documents just to name a few.

Have you heard about the latest artificial intelligence (AI) scenarios with a tool called Copilot? Using Copilot with SharePoint you can supercharge your productivity. We introduce Copilot for SharePoint in Chapter 3 and show you how to use it in ways that seem magical in relevant places throughout the book. You can even use SharePoint right from Microsoft Teams without ever realizing you are using SharePoint (see Chapter 9). We cover all of these scenarios throughout the book.

Officially, Microsoft represents SharePoint 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:

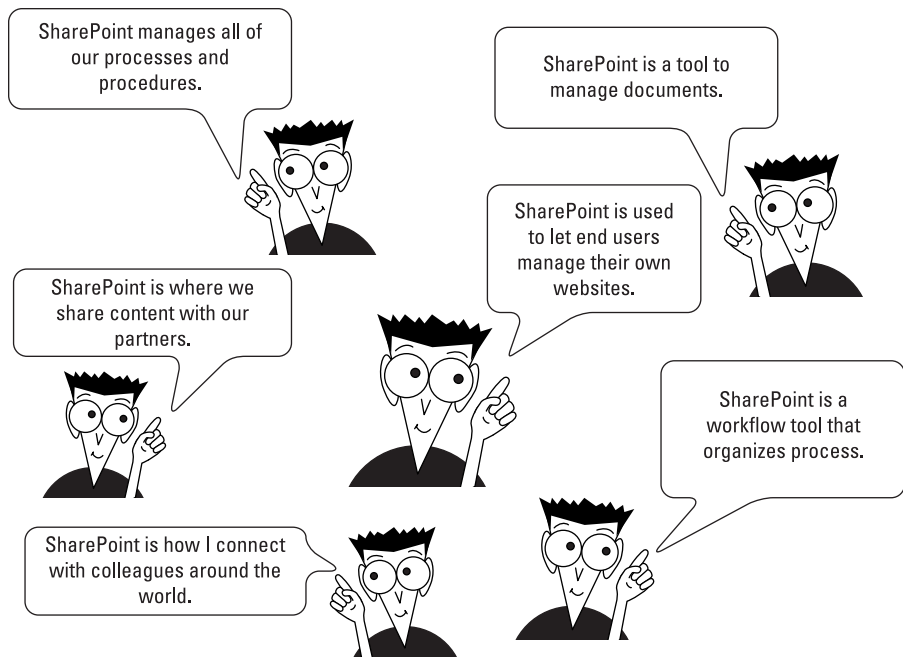
- » **Product:** SharePoint is a product with a lot of features. Explore how SharePoint works without any customization when you're deciding how to approach a solution, and then decide if you want to customize it for your specific needs.
- » **Platform:** SharePoint provides everything you need to deliver 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.
- » **Toolkit:** Finally, SharePoint is a set of components and controls you can mix and match to provide a solution. You can create sites, pages, and apps without leaving the comfort of your web browser. You can bring this same concept to mobile devices with the SharePoint Mobile App and Power Apps.

## Many different SharePoint definitions

SharePoint has many types of users, and depending on where your role fits in, you may have a very different experience from a fellow SharePoint user. For example, you may be assigned to create and administer a SharePoint website for your team. In this case, you may see first-hand the vast functionality of SharePoint websites. On the other hand, you may be a user of a SharePoint site. In this case, your SharePoint world may be only the site that someone has already created for you. To confuse matters further, many organizations will roll out SharePoint and give it a spiffy internal name such as "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 1-6.



**FIGURE 1-6:** SharePoint may be defined in many different ways.



TIP

SharePoint has many 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 visitors:** People who browse to a website that just happens to be using the SharePoint platform. Anonymous visitors just see SharePoint as a website and nothing else.
- » **SharePoint visitors:** People who browse to the site and authenticate so that SharePoint knows who they are. Visitors may still just see a SharePoint site as any other website, except they notice their name in the top-right corner of the screen and know they must log in to reach the site. Visitors may not use any of the features of SharePoint, however, and just browse the information posted on the website.

- » **SharePoint casual users:** People who know all the company documents are posted to SharePoint and know they can upload their own documents to their personal SharePoint site. Casual users may realize that they are using SharePoint, or they may just think of the platform as the name the organization has given to SharePoint. For example, we have seen organizations give their web platform names such as Source, 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 users:** People familiar with SharePoint and its main features. SharePoint users often perform various administrator functions even if they don't realize it. For example, they may be responsible for an app that stores all the company policies and procedures. Thus, they are an app administrator. Users may also be responsible for a site for a small team, in which case they are site administrators. As you can see, a user can play many different roles.
- » **SharePoint power users:** Power users are familiar with the main SharePoint features and functionality and dive deeper. They may be familiar with the functionality differences of different features, routing documents using workflows, and building site hierarchies. Power users may also be site collection administrators and thus responsible for a collection of sites.
- » **SharePoint technical administrators:** Technical administrators are people from the IT department responsible for SharePoint. Technical administrators are less concerned with using SharePoint for business and more concerned about making sure the platform is available and responsive. An administrator may 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 may 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 its sheer amount of functionality and capabilities. 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 has some similarities with social media services such as Facebook, LinkedIn, and X (formerly called Twitter), but differs from them in its intended use. Facebook, LinkedIn, and X 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 X, 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 X.



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.



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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. Just ask someone to define “AI” for you.

## 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.



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 appears, and if the publishing feature is active, you will 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 19. In general, Microsoft is moving to simplify SharePoint. One way it is doing this is by making it easy to create a Team or Communication site, which means you would need to hunt a bit to find the other templates.

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 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 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.

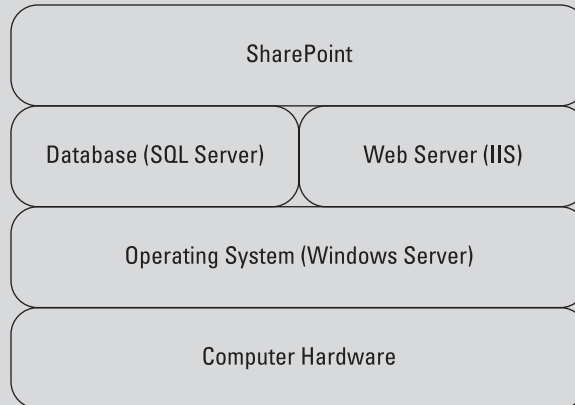


TECHNICAL  
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## TECHNICAL DIVE INTO THE SHAREPOINT BUILDING BLOCKS

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 may ask you what the heck you are trying to do using a non-Microsoft product to install SharePoint.

All of this information is really only relevant if you plan to install SharePoint Server yourself. If you sign up for Microsoft 365, as outlined earlier in the chapter, Microsoft handles all of this technical pain for you so you can focus on using SharePoint.

## Getting Familiar with SharePoint Terminology

You should add several terms to your SharePoint vocabulary. Some terms are made up by the Microsoft marketing department, some are industry standards, and others are buzzwords that have grown to have various meanings depending on the context of the conversation.

### AI and Copilot

The term *AI* refers to artificial intelligence and the term *Copilot* refers to Microsoft's product that uses a specific type of AI. If you have heard of a product called ChatGPT by a company called OpenAI, then you are already familiar with Copilot. Microsoft invested billions of dollars in OpenAI and has a strategic partnership with the company. Microsoft uses the AI model that powers ChatGPT for its Copilot product.

# 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 19.



TIP

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. H. P. Luhn published an article titled “A Business Intelligence System” in the October 1958 edition of the *IBM Journal*. The article describes how an organization can process documents to make business decisions. Business intelligence has continued to evolve over the years and has morphed into a catch-all phrase for using data to drive business.

In the Microsoft realm, business intelligence (BI, pronounced *bee-eye*) consists of several different technologies. In fact, we wrote an entire sister book on the subject: *Microsoft Business Intelligence For Dummies* (Wiley). 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 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 may 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 may 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.



REMEMBER

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 25 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

*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 Power Apps that allows you to create mobile SharePoint apps without needing to be a programmer. We cover the SharePoint Mobile App in Chapter 5 and Power Apps in Chapter 18.

## 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 may 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 stringent 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, 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 24.



TIP

Search is one of those topics that spans from simple to mind-numbingly complex. At a base level, every SharePoint site includes search capabilities 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.



TIP

Search is changing rapidly due to new AI models. It is common for young people to ask the question of why you would ever type a query into Google and look through all of those blue links when you could just ask ChatGPT and get the answer straight away and then have a conversation with it about the answer. As mentioned earlier, Copilot is the name of Microsoft's AI product. Similar to how you ask ChatGPT for an answer, you can ask Copilot for an answer about your data and content in SharePoint. We expect "search" to be one of the areas that dramatically transforms in organizations and in SharePoint. Traditional search may well be moving to a thing of the past as it is replaced by AI tools like ChatGPT and Copilot. We introduce Copilot in Chapter 3.

## 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, nor every individual, 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 11.

## 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 to manage, 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.

You may 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.



TIP

Using Copilot you can supercharge your content creation abilities. Where you may have had to spend hours or days pulling data, analyzing it, and building reports. Now you can use Copilot to do the same process and tasks in minutes.

## 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 product called Microsoft Flow. Microsoft then expanded the product and renamed it Microsoft Power Automate. Power Automate is not part of SharePoint, but it integrates with SharePoint as well as with many, many other products (both Microsoft and others).

Using Microsoft Power Automate you can finally build a workflow that mimics the way you work. If you use products such as Survey Monkey, GitHub, or many others, you can use Power Automate to build workflows that integrate with SharePoint. Now, Microsoft is integrating Copilot with Power Automate so you can create workflows, also called flows for short, using your friendly Microsoft AI called Copilot. We cover using Power Automate with SharePoint in Chapter 16.