Microsoft 365
COMMUNITY CONFERENCE

Enhancing communication and collaboration through customized search experiences

Emily Mancini

Whova

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M365 Community Conference

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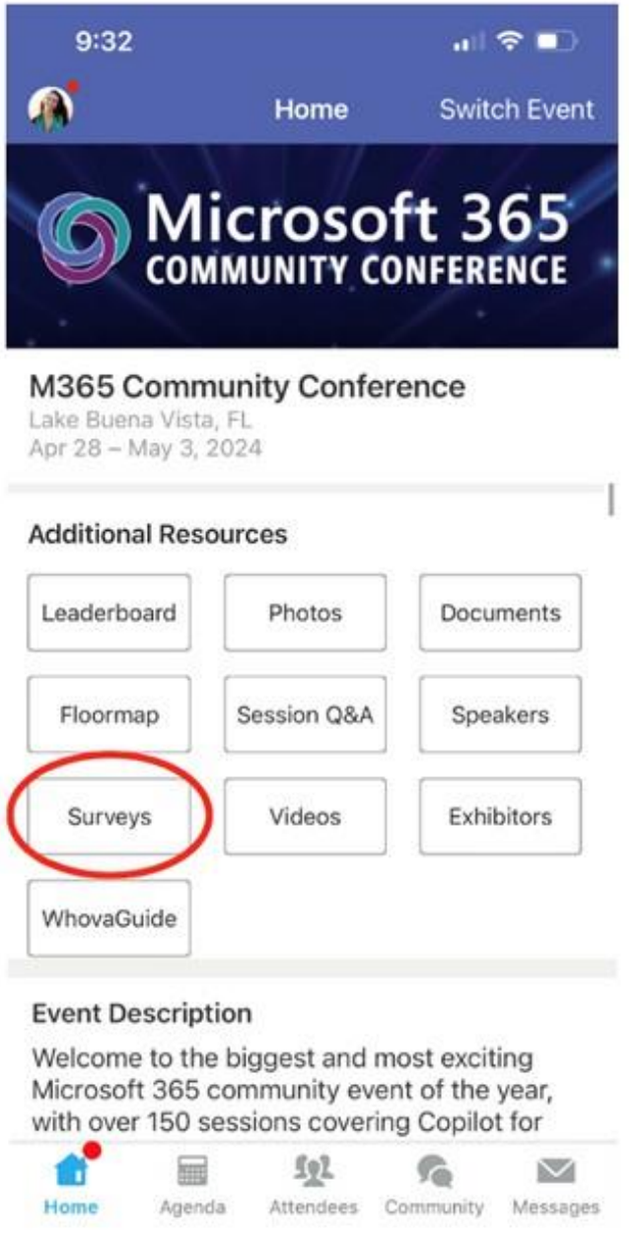
Event Invitation Code:
M365Con2024



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We really want to hear from YOU!

In the pursuit of making next year's Microsoft Fabric Community Conference even better, we want to hear your feedback about this session.

Here's How -

- *Simply go to the Whova App on your smartphone*
- *Scroll down on the M365 Community Conference Homepage to 'Additional Resources' to click "Surveys'.*
- *Click Session Feedback.*
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- *Finally, click 'Submit'*

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emPOWER everyone

Power Platform COMMUNITY CONFERENCE

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SEPT 18-20, 2024 • MGM GRAND LAS VEGAS, NV

Workshops Sept 16, 17 & 21

PowerPlatformConf.com PowerPlatConf

Emily Mancini

Executive Director, Left Uncharted

3-time Microsoft MVP (Office Apps & Services)

Organizer of M365 Miami (Community Day Event)

PnP Team: Microsoft Community Content

Principal architect & user experience specialist

Previously a solo Microsoft 365 platform owner & trainer at a biotech

Agenda

- Default search scopes
- Search experiences
  - Search bookmarks
  - Restricted search
  - Content type gallery
  - Highlighted content web part
  - Modern PnP search
- Learning Pathways vs Viva Learning

The scope of this talk 🗺️

Included

A 200-level session skipping over the basics

High-level review of available options to centralize content

Cost-free solutions for extending content management options

Excluded

An introduction to modern in SharePoint Online

A deep technical walkthrough of how to implement these options

Overview of Purview or SharePoint Advanced Management (added cost)

Our scope: the intranet

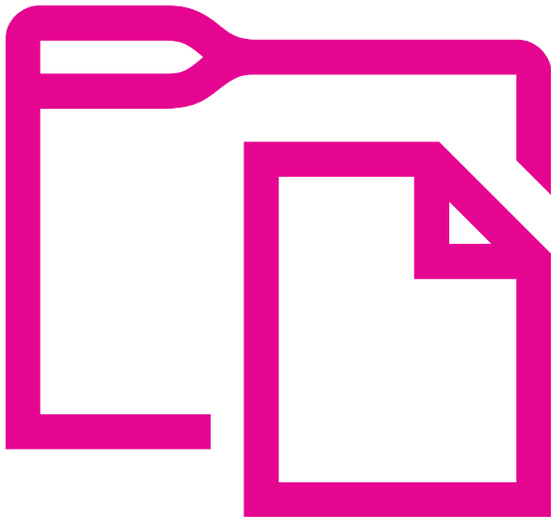
THE PERIODIC TABLE OF Microsoft 365

jumpto365

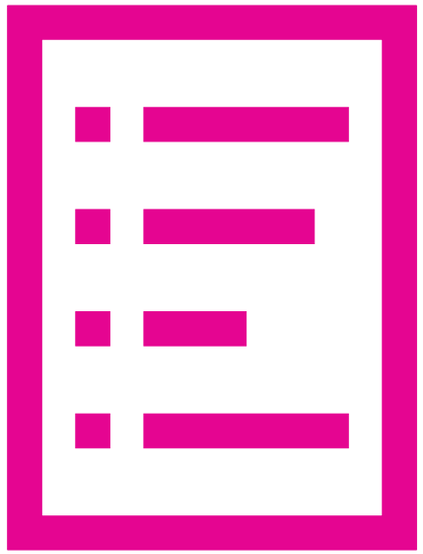
CRM & ERP	Dynamics 365 CRM & ERP [Salesforce]	Viva Sales M365 & Teams integration with CRMs							Whiteboard Brainstorming & note taking [Miro]	Sway Next-gen presentations	PRESENTATIONS & NOTE TAKING	MICROSOFT 365 GROUPS	Outlook Groups Central email & calendar plus the rest	OUTLOOK GROUPS
GRAPHIC & VIDEO DESIGN	Clipchamp Video editor and stock video library	Create Design & template portal	Designer Preview AI-powered graphic designer			Excel for the Web Spreadsheets in the browser	Word for the Web Word processing in the browser	OneNote for the Web Note taking in the browser [Evernote]	PowerPoint for the Web Presentations in the browser	OFFICE FOR THE WEB		Teams Teams Central chat & wiki plus the rest	TEAMS TEAMS
VIDEO STORAGE & CREATION	Stream Video portal [YouTube]	Lists Database power, spreadsheet usability	DATA STORAGE & DATABASES	Dataverse Databases for Teams & Power Platform	Power Apps Code-free mobile apps (& forms)	Power Pages Low-code websites and forms	Copilot Studio Low-code chatbots (formerly Power Virtual Agents)	Power Automate Code-free workflows [IFTTT]	Visio for the Web Diagramming in the browser	WORKFLOWS		Viva Engage Communities Feed-based groups (formerly Yammer)	VIVA ENGAGE COMMUNITIES
FILE STORAGE & COLLABORATION	OneDrive for Business Personal file storage [Dropbox]	SharePoint Online Team file sharing & storage	Delve Deprecating 2024 Employee profile & content discovery	Teams Chat, meetings, & files in one place [Slack]	FORMS	Forms Simple forms & polls [SurveyMonkey]	Loop App with workspaces & live components	Lens Mobile scanning & image cleanup	Power BI Business analytics & dashboards	BUSINESS INTELLIGENCE		Loop Atomic units of productivity	MICROSOFT LOOP
COMMUNITIES & COMMUNICATIONS	Viva Connections SharePoint & Yammer in Teams	Viva Engage New name for Yammer [Facebook]	Copilot Limited availability Your AI-powered helper across all apps	Microsoft 365 app Central entry point on desktop & mobile	HOME BASE	Bookings Customer self-reservations	Viva Learning Centralized LMS in Teams	Viva Topics Curated and AI knowledge	Viva Insights Personal metrics & self-improvement	EMPLOYEE DATA & DISCOVERY		Power Platform Apps and automation	POWER PLATFORM
OUTLOOK	Mail Outlook email	Calendar Outlook calendar	People Outlook contact list	To Do To-do list for life & work [Wunderlist]	TASK MANAGEMENT	Planner Everyday project management [Trello]	Project for the Web Premium project management	Viva Goals Local and org-wide OKR management	PROJECT & GOAL MANAGEMENT	Kaizala Deprecating Large-scale comms [WhatsApp]		Viva Employee experience apps, mainly in Teams	MICROSOFT VIVA

https://www.jumpto365.com/tables

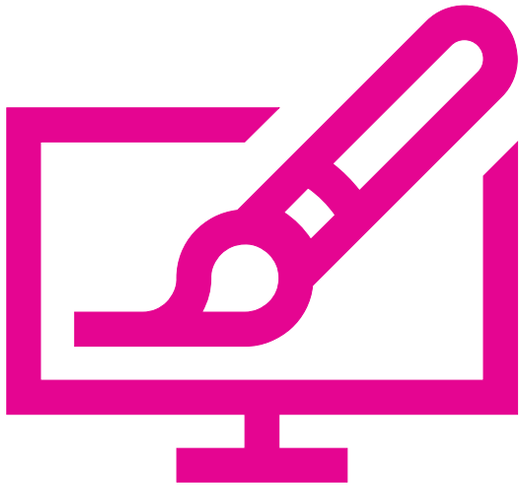
Within SharePoint, we will focus primarily on:



Libraries



Lists



Apps

All information architecture how-to and better practices apply

Libraries

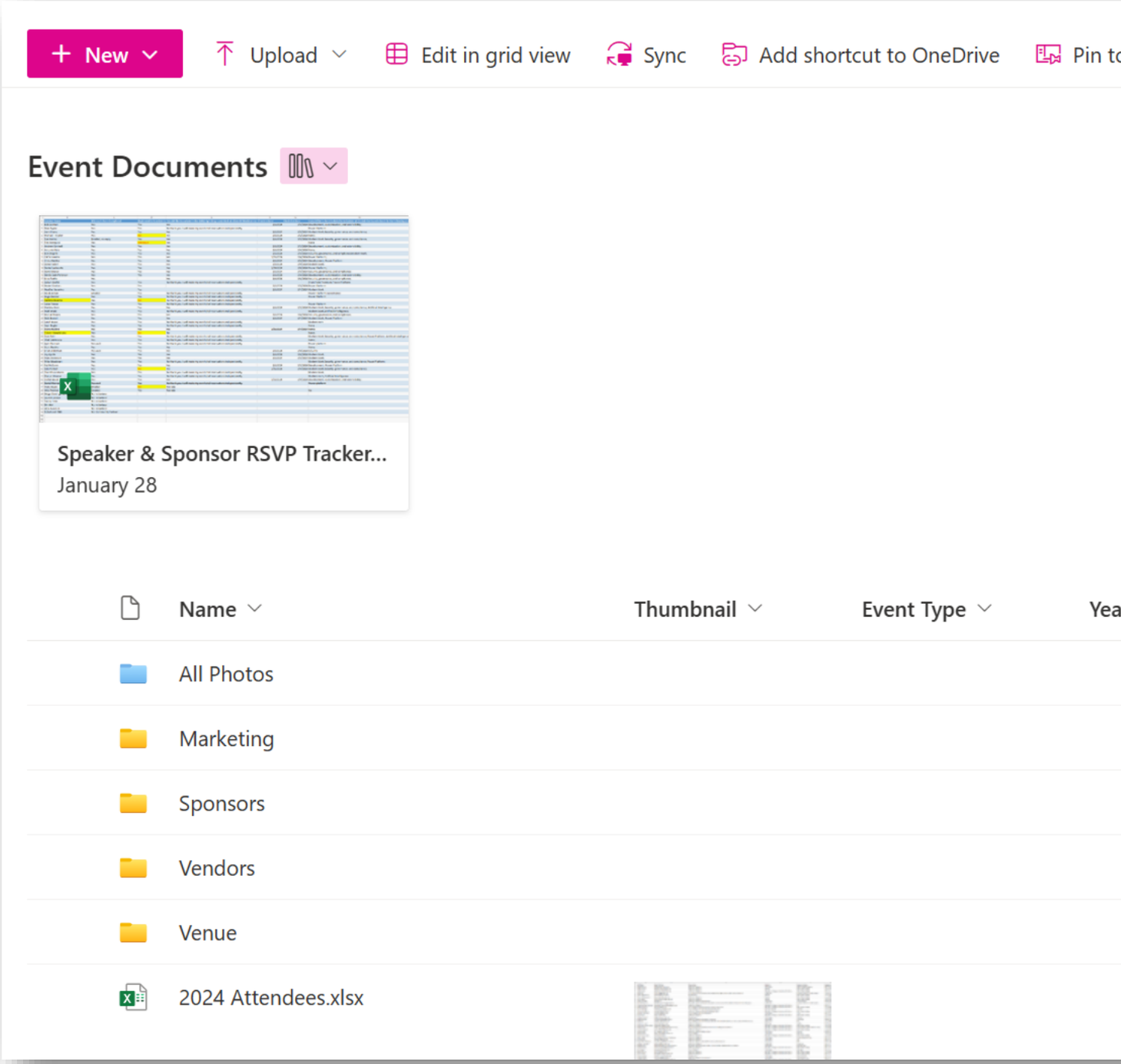
Features

- Centralized storage
- Access control
- Collaboration & co-authoring
- Version history
- OneDrive sync
- Mobile access
- Integration with other Microsoft tools

Supported file types

- Microsoft Office files
- Images
- 3-D Modeling/Printing
- Audio/Video Media Files
- Adobe files
- Text and code
- AutoCAD
- Compressed Files
- Rich Text Format
- Email
- Open eBook
- OpenOffice

Resource: Introduction to libraries



Microsoft Lists

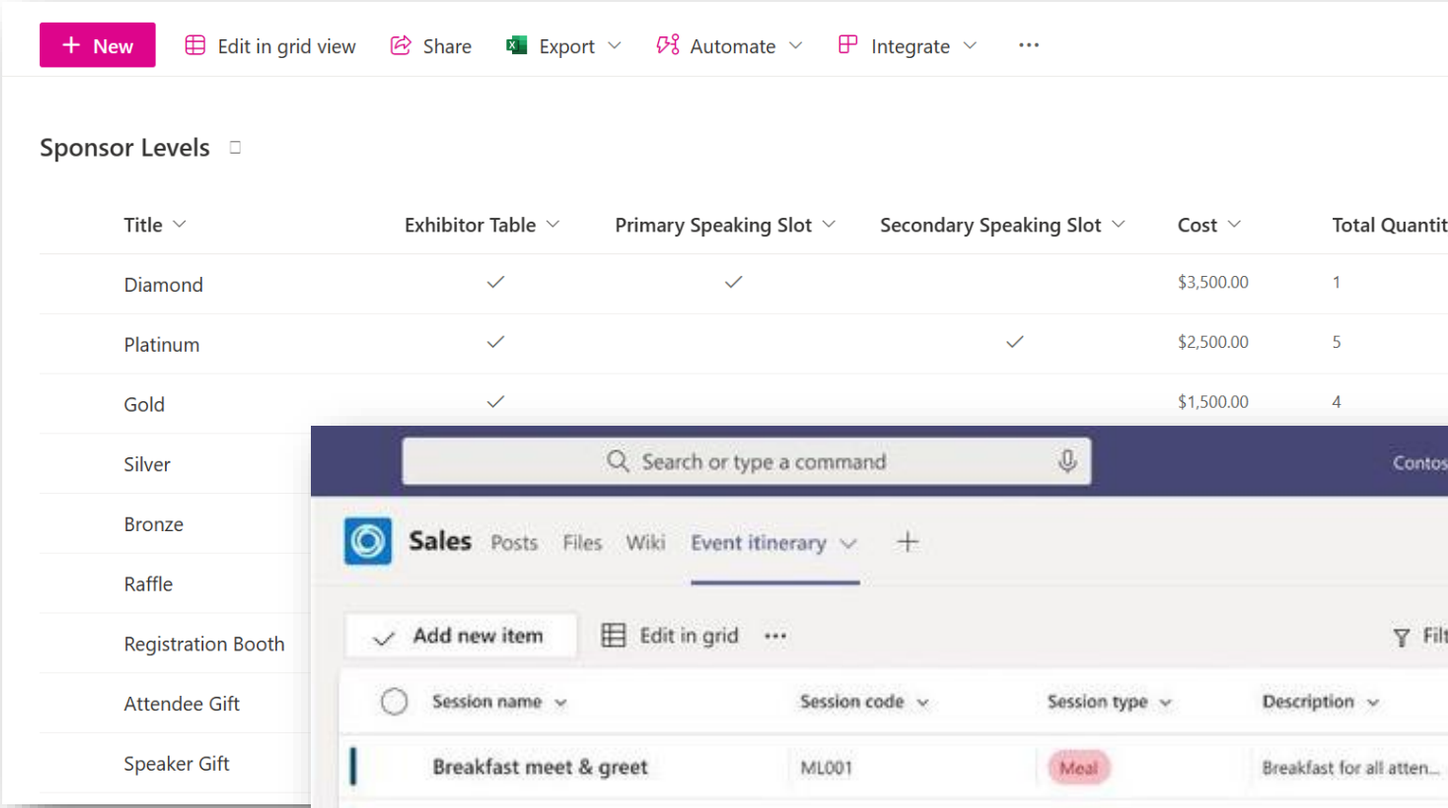
Features

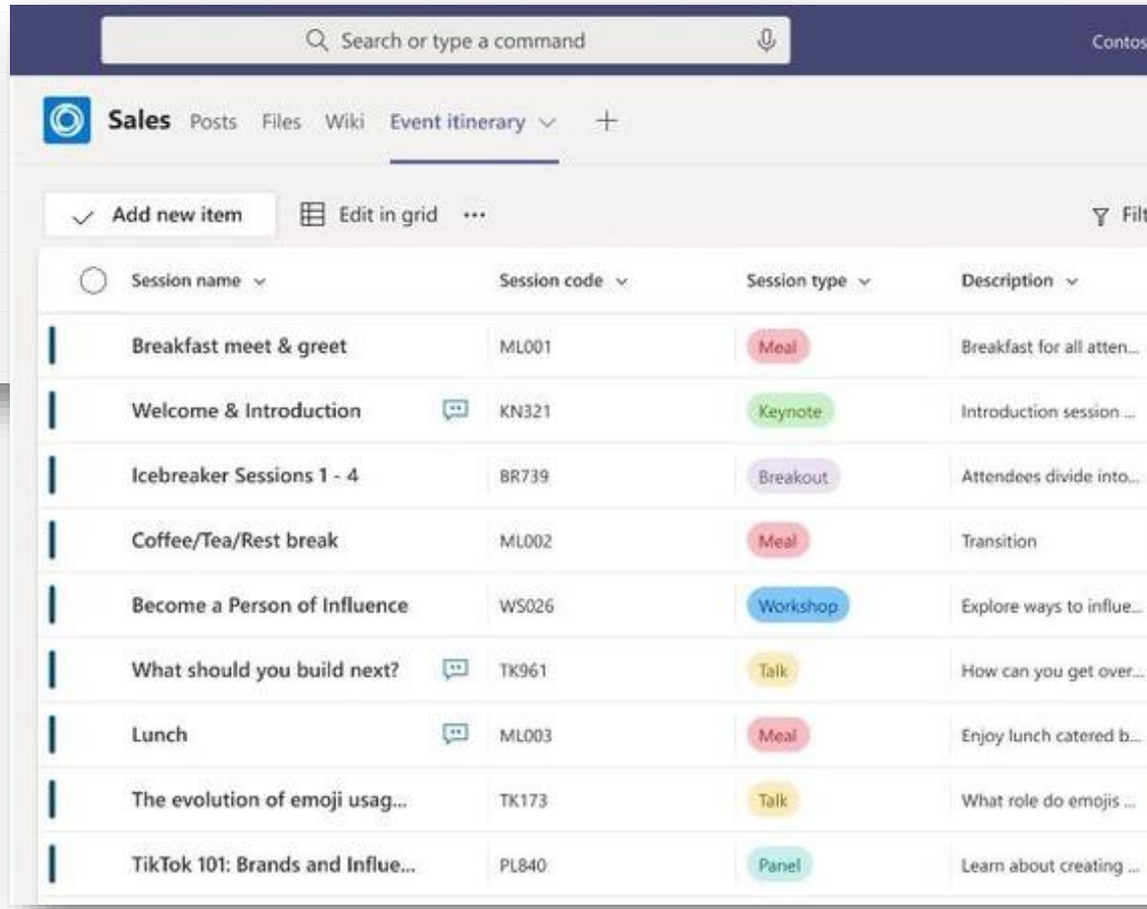
- Customizable templates
- Various column types
- Sharing and collaboration
- Views and formatting
- Smart rules and alerts
- Integration with power platform
- Enterprise-grade security

Examples

- Internal customer service requests (IT help, wellness reimbursement, time off)
- Tracker (vendors, communication plan)
- Frequently asked questions
- Simple data presentation

Resource: Introduction to lists





Search Bookmarks
Restricted Search
Search Verticals
Highlighted Content Web Part
Available by default in Microsoft 365
Modern PnP Search
Community solutions
Learning Pathways

Return on investment for good usability (in an intranet)

Study scope: 18 common tasks across intranet

49 minutes for low usability intranet (bottom 25%)

25 minutes for **good usability** intranet (top 25%)

49% decrease

(Task time) x (# of times to perform task) = Estimated hours per year

Low usability: 43 hours
Good usability : 25 hours

Spending ~10% of a project's budget on usability activities doubles usability

Source: Return on Investment (ROI) for Usability By Jakob Nielsen, J.M. Berger, Shuli Gilutz, and Kathryn Whitenton

But how do we measure and calculate ROI?

Project cost

Measured in money

Usability

Measured in increased use, more efficient use, or higher user satisfaction

Source: Return on Investment (ROI) for Usability By Jakob Nielsen, J.M. Berger, Shuli Gilutz, and Kathryn Whitenton

Agenda

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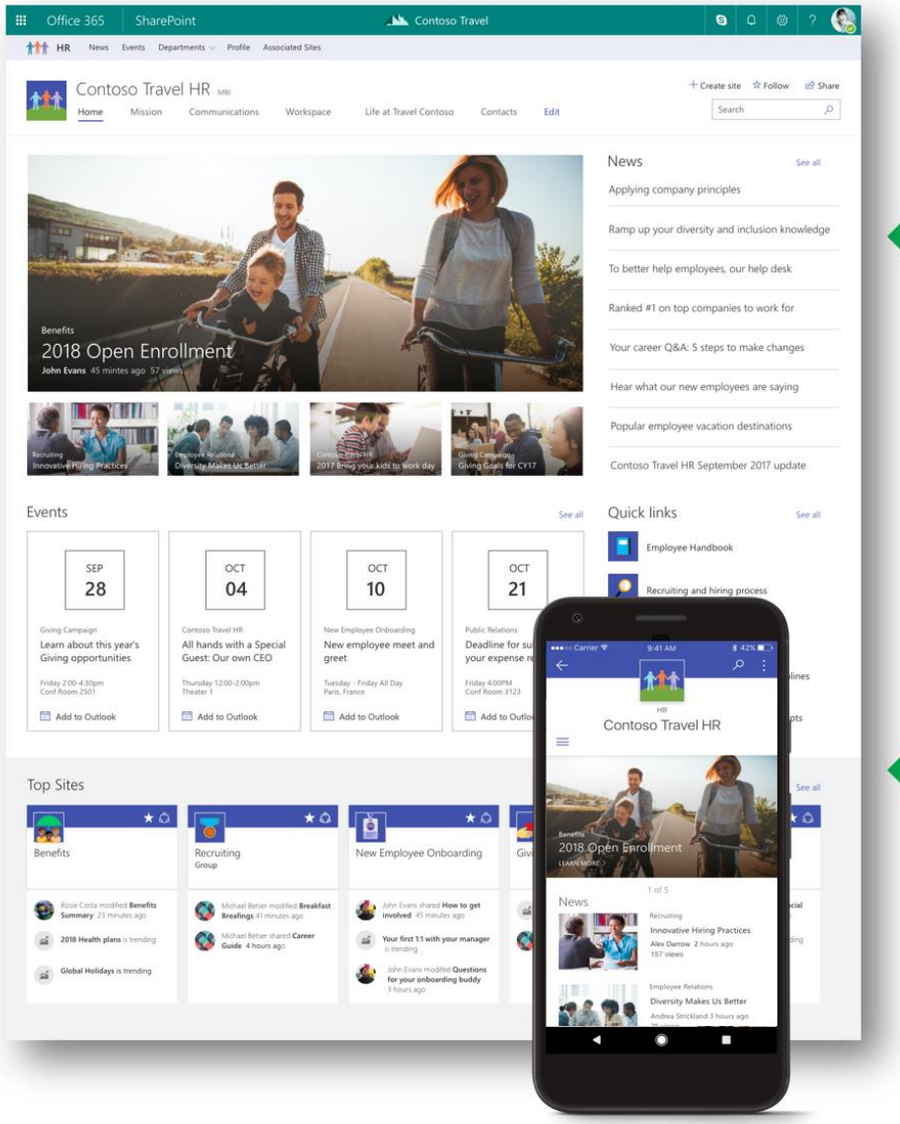
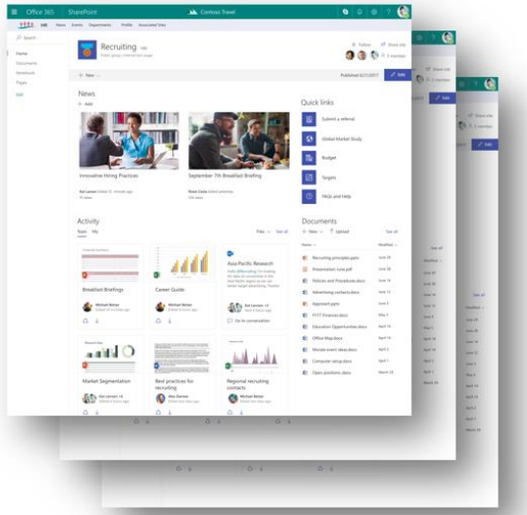
Modern Site Architecture

hub site



team sites



communication sites

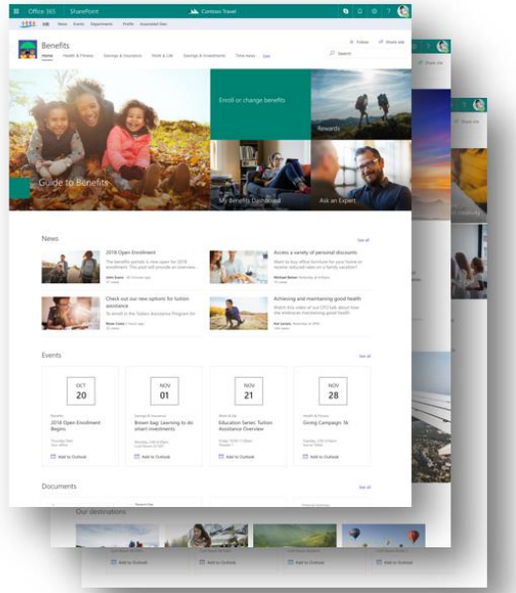


Image Source: Planning your SharePoint hub sites - SharePoint in Microsoft 365 | Microsoft Learn

Hub site superpowers

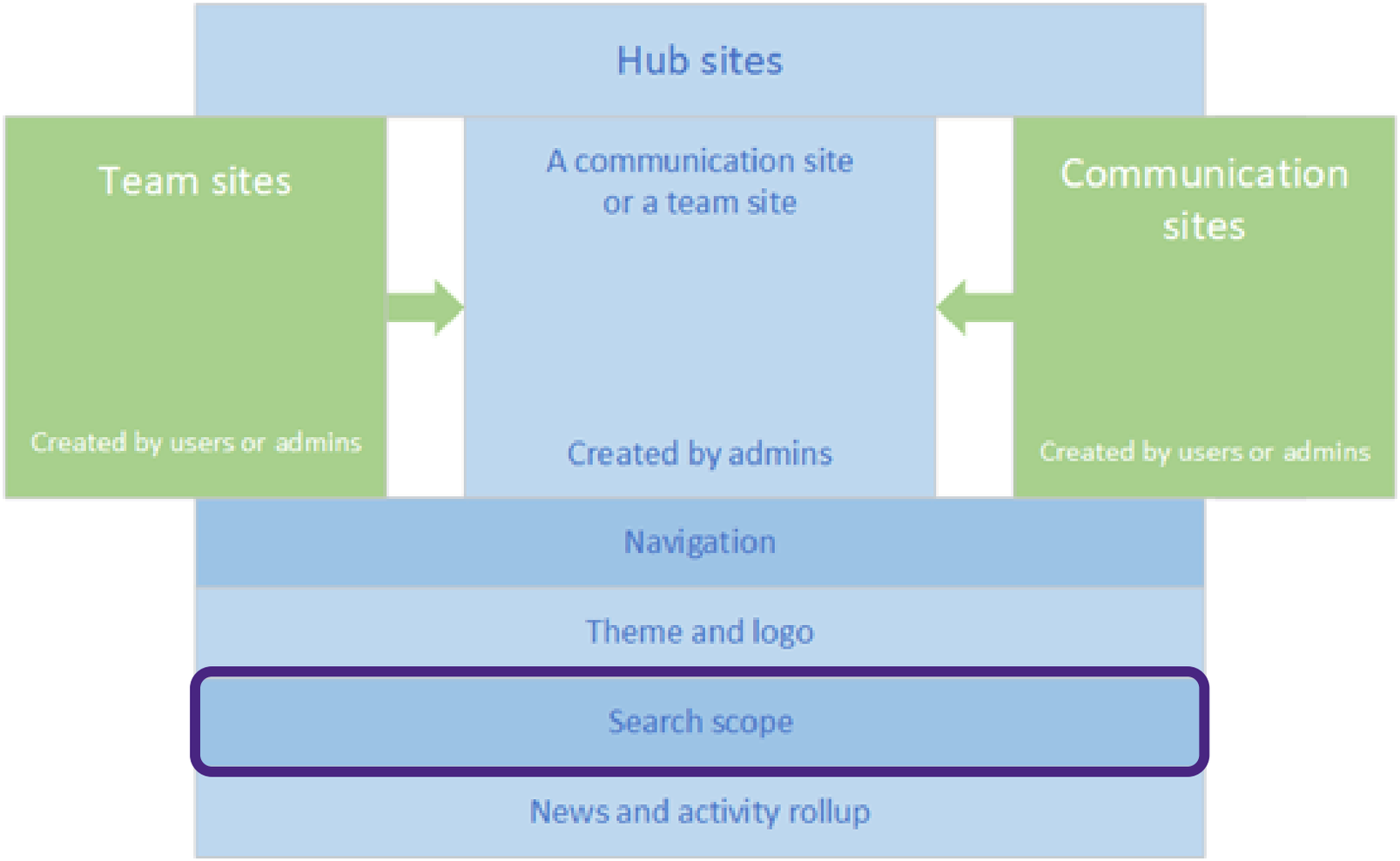


Image Source: Planning your SharePoint hub sites - SharePoint in Microsoft 365 | Microsoft Learn

Search uses a keyword index

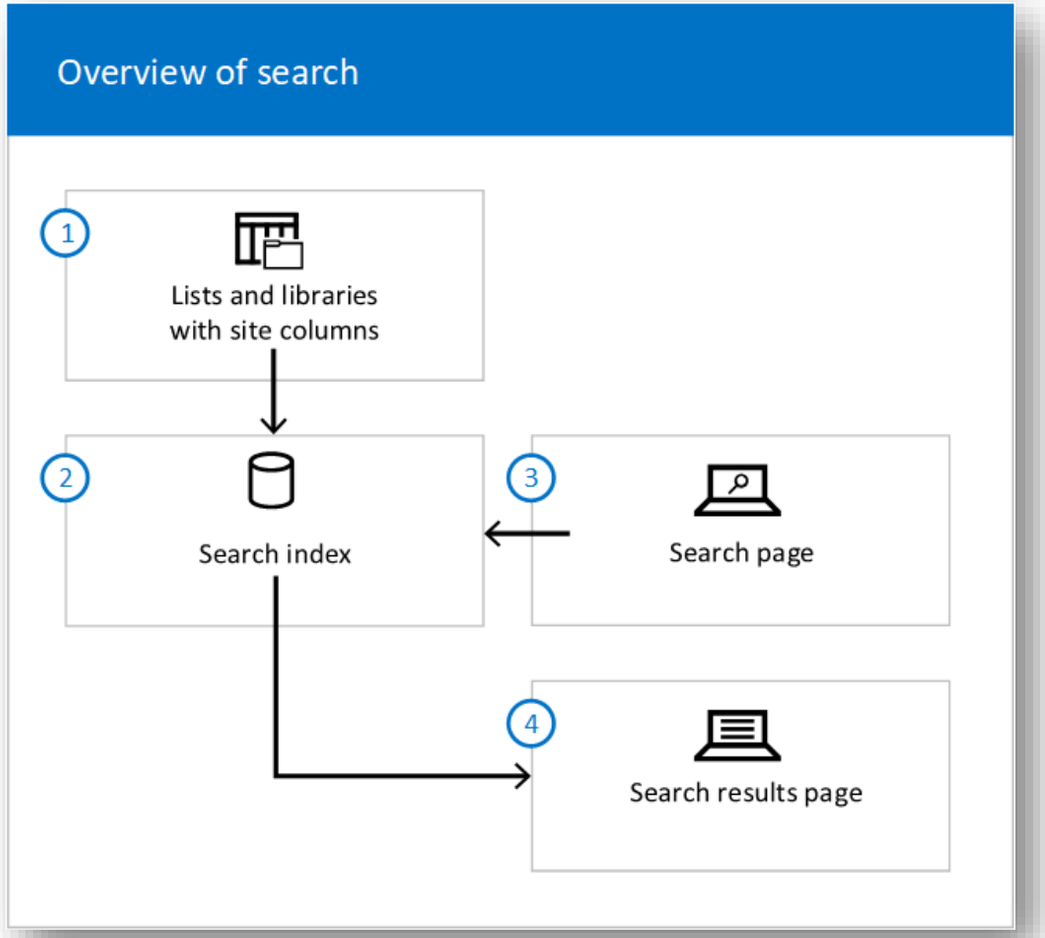
A **keyword** refers to a specific term or phrase used to enhance search results

Microsoft Search processes the query and parses **search intent** from larger phrases:

"how to change my password" becomes "change password"

Source: https://prod.support.services.microsoft.com/en-us/office/find-what-you-need-with-microsoft-search-d5ed5d11-9e5d-4f1d-b8b4-3d371fe0cb87

Microsoft Search in SharePoint Online



In lists and libraries, site columns store detailed information about each document.

Search crawls the lists and libraries and adds the site columns and values to the search index.

In the search index, site columns are mapped to managed properties.

When a user enters a query in a search box, the query is sent to the search index.

The search engine finds matching results, and sends them to a search results page

Source: Overview of search in SharePoint - SharePoint in Microsoft 365 | Microsoft Learn

What is a semantic index?

Map of personal and company data

Identifies relationships

Makes connections

Semantic map of an elephant:

- Has trunk
- Travels in herds
- Live in Africa and Asia

Source: https://learn.microsoft.com/en-us/MicrosoftSearch/semantic-index-for-copilot

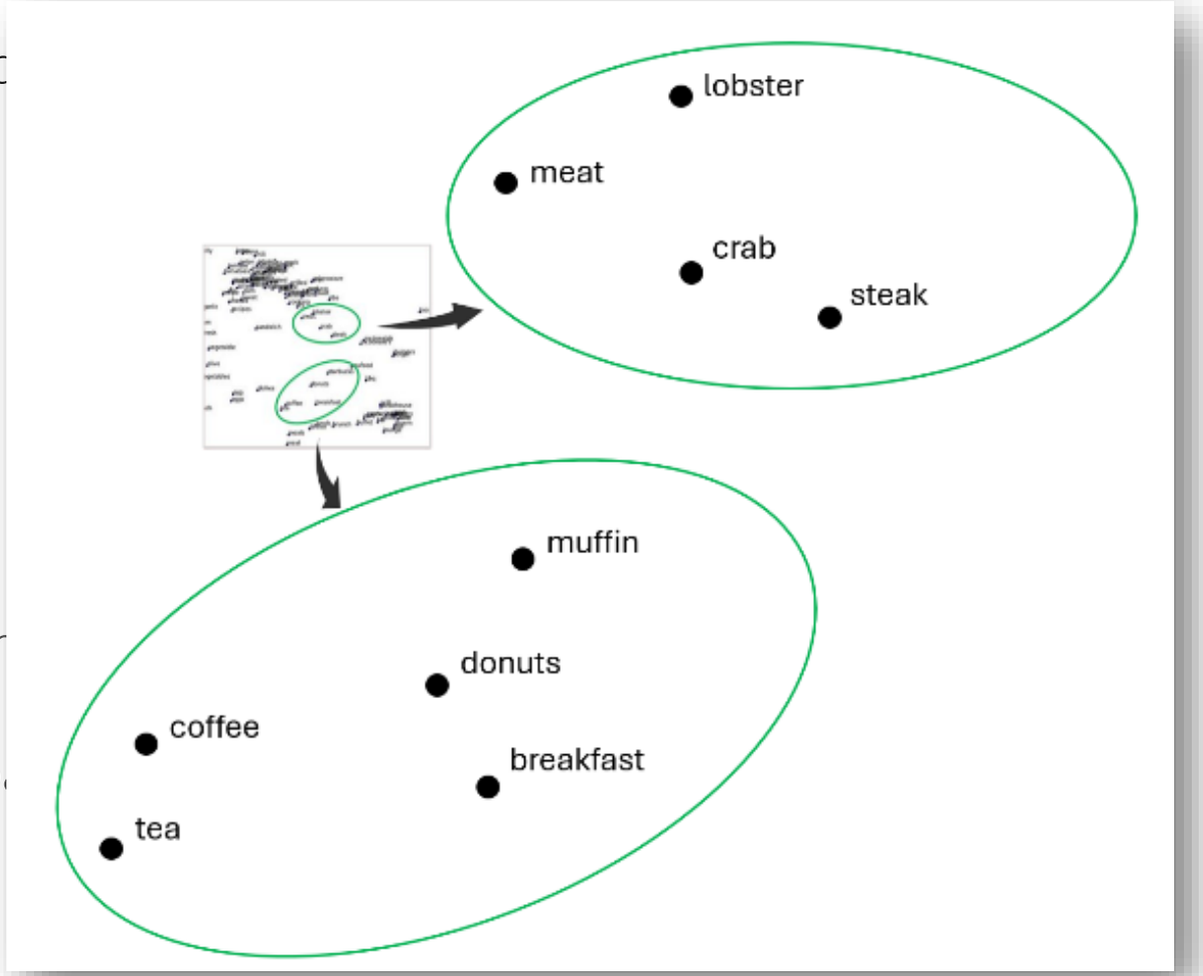
What is a semantic index?

Sits on top of the Microsoft Graph which inc
Microsoft 365 applications

Based on:
- Keyword matching
- Personalization
- Social matching

Created through vectors
- A numerical representation of a word, im

Can find the most similar or relevant data b
meaning

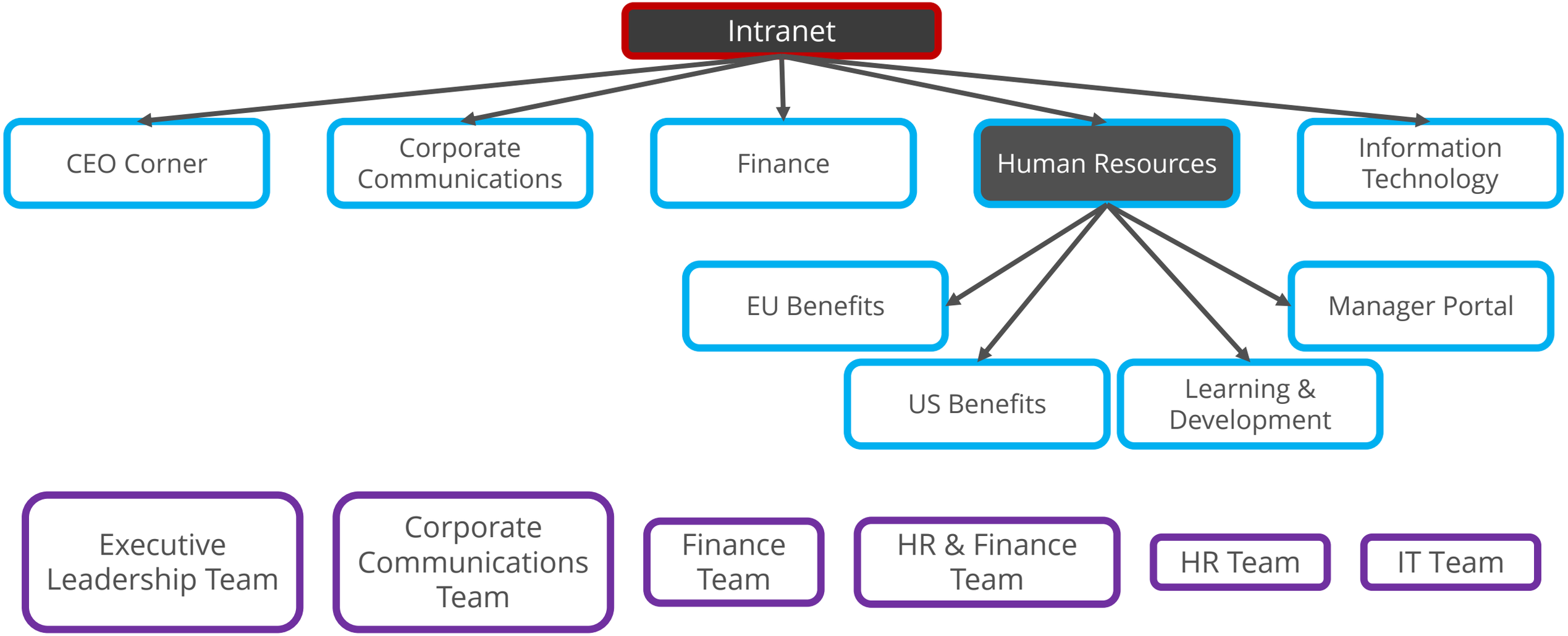


Source: https://learn.microsoft.com/en-us/MicrosoftSearch/semantic-index-for-copilot

ACTIVITY:
Generate semantic index for Orlando, Florida

Searching for content in an intranet

Example intranet structure



KEY: Hub Site | Communication Site | Team Site | Home Site | → Associated Site (to Hub)

A **user need statement** is an actionable problem statement summarizing who a particular user is, the user's need, and why the need is important to that user.

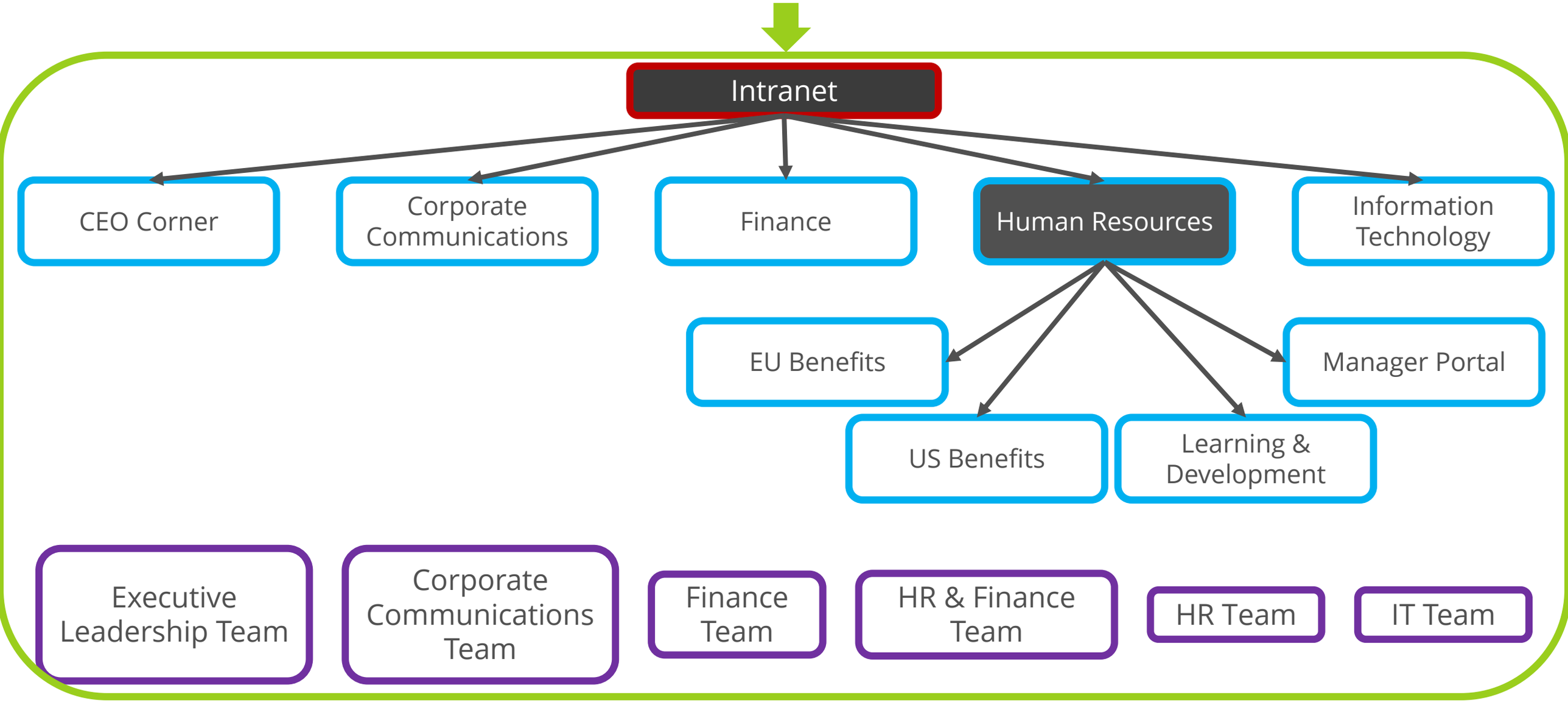
User	Need	Goal
An individual contributor	Find the company policy for social media	Comply

Gibbons, Sarah. "User Need Statements: The 'Define' Stage in Design Thinking." *Nielsen Norman Group*, 2019, https://www.nngroup.com/articles/user-need-statements/.

Role	Need	Outcome Objective
An individual contributor	Find the company policy for expenses	Comply
A new hire	Apply for a company card	Make purchases in approved method
A manager	Train individual contributor on business process	To empower growth and advancing skills

Gibbons, Sarah. "User Need Statements: The 'Define' Stage in Design Thinking." *Nielsen Norman Group*, 2019, https://www.nngroup.com/articles/user-need-statements/.

What happens when I search for “company card”?



KEY: Hub Site | Communication Site | Team Site | Home Site | → Associated Site (to Hub)

Travel - Search

https://eemancini.sharepoint.com/_layouts/15/search.aspx/?q=company%20card

SharePoint

company card

All | Files | Sites | People | News | Images | Tools

Feedback

Filters | File type | Last modified

Apply for a company card

https://eemancini.sharepoint.com/sites/Finance/SitePages/Apply-for-a-company-card.aspx

Emily Mancini modified a few seconds ago

company cards to all employees to be used on approved **company** expenses. To apply for your...**card**, please Discuss the need with your manager Fill out a **Company Card** Request

Contoso Onboarding

https://eemancini.sharepoint.com/sites/NewEmployeeOnboarding

The purpose of this site is to help new hires learn about Contoso....

CustomConfig

Microsoft 365 learning pathways

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Hawaii Vacation Planner

Travel

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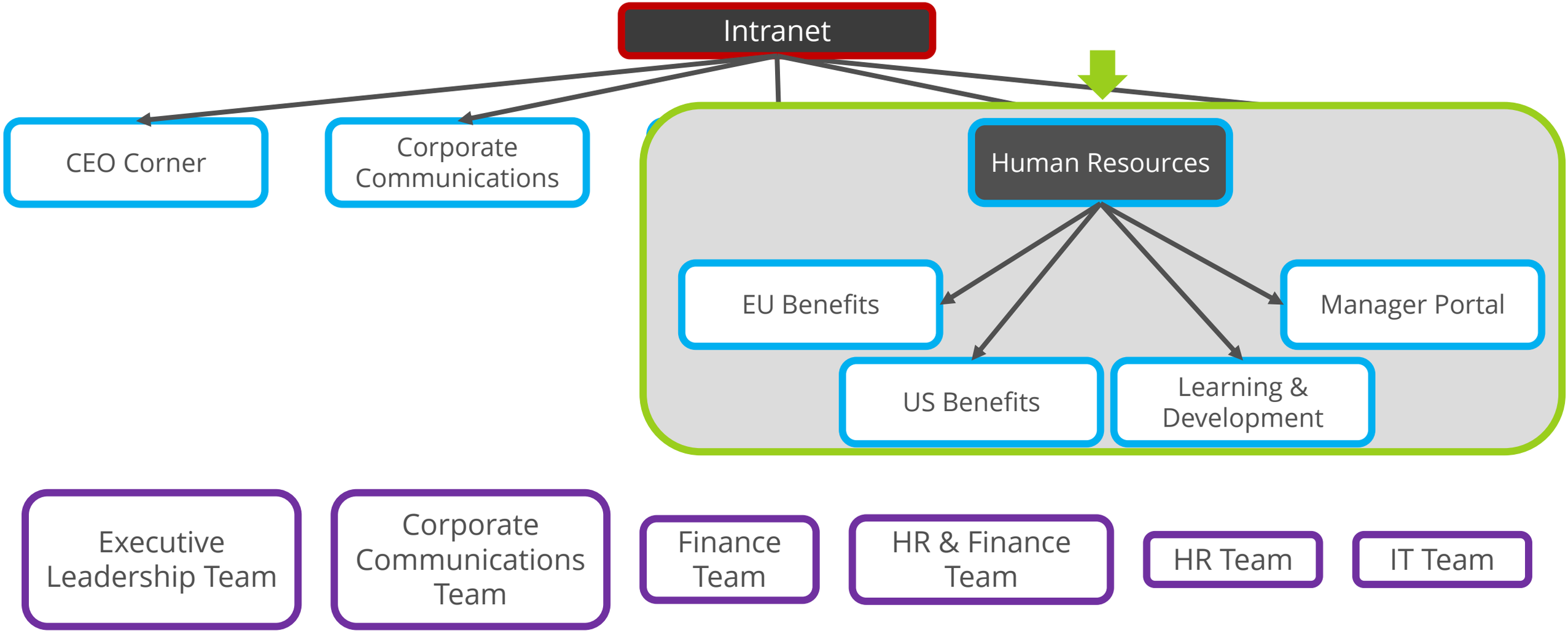
HAWAII 2008 VACATION PLANNER HAWAII Aloha spirit: You will find it everywhere you go on these stunningly beautiful islands. Incredible

Search Optimization Tracker

Testing Subsite

Emily Mancini modified on May 10

What happens when I search for “company card”?



KEY: Hub Site | Communication Site | Team Site | Home Site | → Associated Site (to Hub)

Organization › Travel › Human Resources

All Files Sites News Images

Feedback

We couldn't find any results on this site for **company card**

Search all content in Travel for **company card**

Travel - Home | Human Resources - Search

https://eemancini.sharepoint.com/sites/HR/_layouts/15/search.aspx/siteall?q=company%20card&s=900402217649176385&scope=hub&sid=f93d921f-51...

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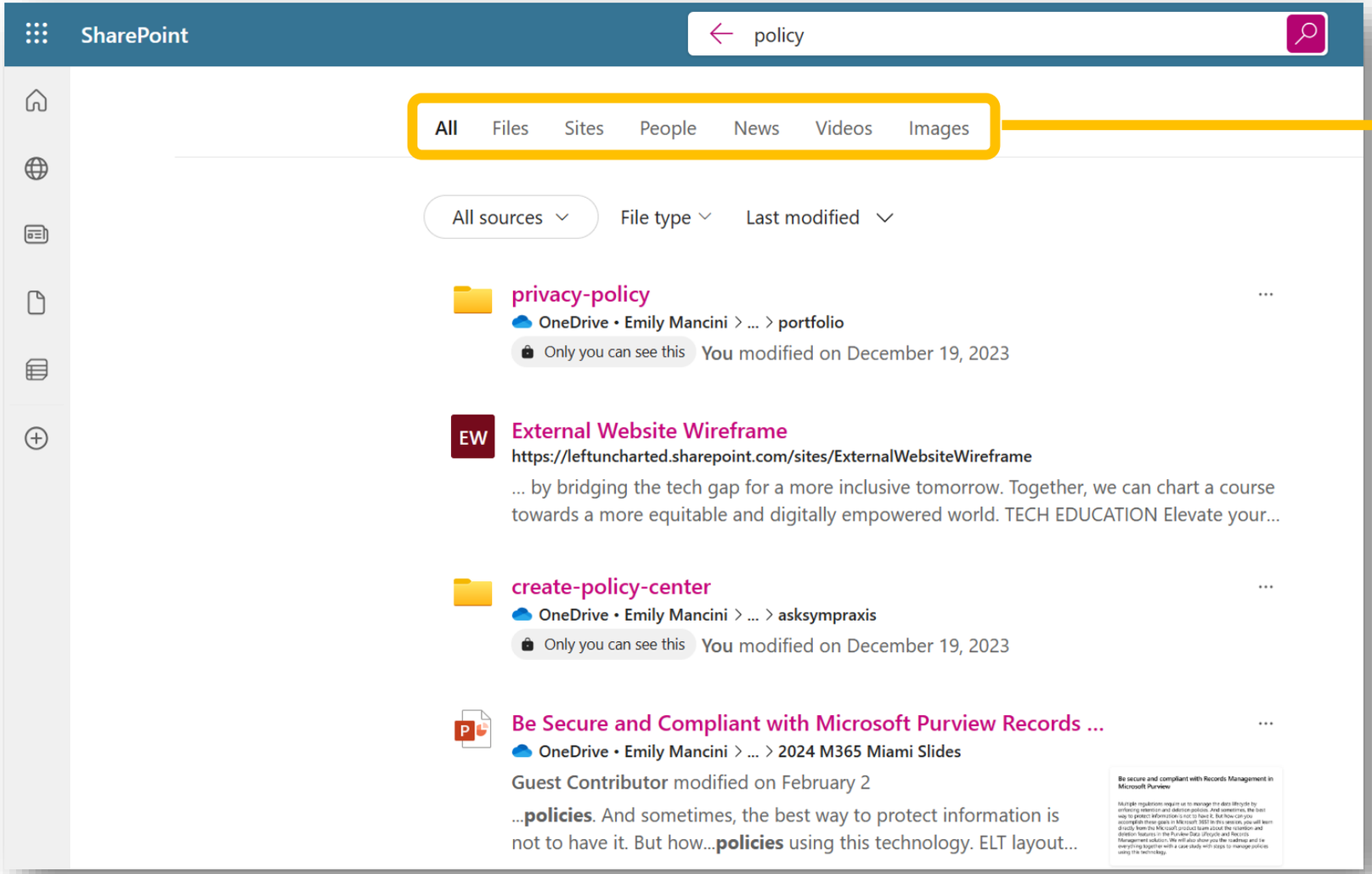
Important training point

How do I add a scoped search to the intranet?

Search verticals



Tabs on the search result page that show results of a specific type or from select sources

Options

- Out of the box verticals
- Custom verticals
- Organization level
- Site level

Learn more: Manage search verticals | Microsoft Learn

How do I limit the default search scopes?

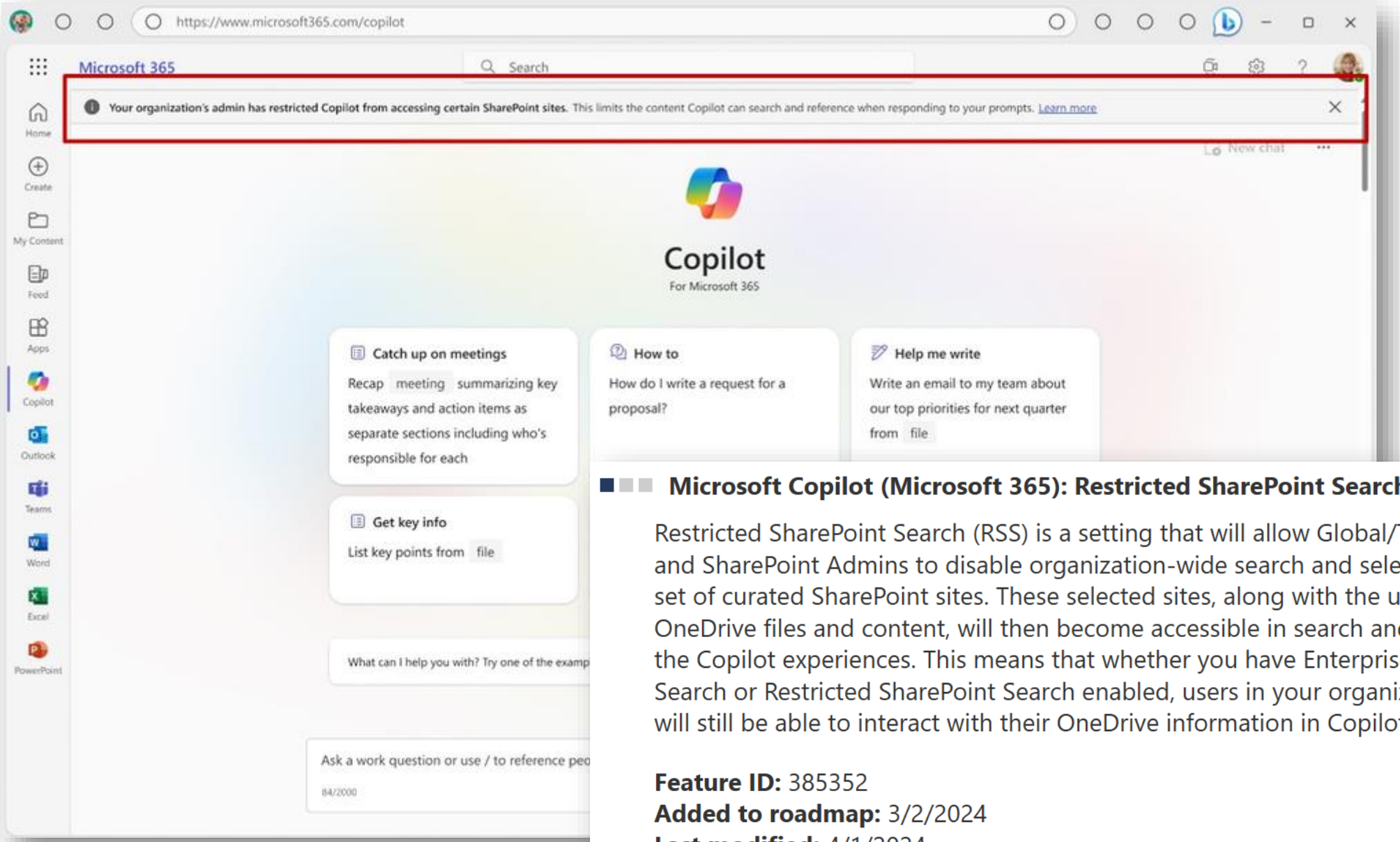
Restricted SharePoint Search

Allows you to:

- Disable organization-wide search
- Restrict both Enterprise Search and Copilot experiences to a curated set of SharePoint sites of your choice

Copilot and non-Copilot users will be able to find and use content from:

- An allowed list of curated SharePoint sites set up by admins (with up to 100 SharePoint sites), honoring sites' existing permissions.
- Content from their frequently visited SharePoint sites.
- Users' OneDrive files, chats, emails, calendars they have access to.
- Files that were shared directly with the users.
- Files that the users viewed, edited, or created.



Restricted SharePoint Search

Microsoft Copilot (Microsoft 365): Restricted SharePoint Search

Restricted SharePoint Search (RSS) is a setting that will allow Global/Tenant and SharePoint Admins to disable organization-wide search and select a set of curated SharePoint sites. These selected sites, along with the users' OneDrive files and content, will then become accessible in search and in the Copilot experiences. This means that whether you have Enterprise Search or Restricted SharePoint Search enabled, users in your organization will still be able to interact with their OneDrive information in Copilot.

Feature ID: 385352
Added to roadmap: 3/2/2024
Last modified: 4/1/2024
Product(s): SharePoint, Microsoft 365 Admin Center, Microsoft Copilot (Microsoft 365)
Cloud instance(s): Worldwide (Standard Multi-Tenant)

Preview Available: April 2024
Rollout Start: May 2024

What are my options for surfacing content outside the default search scopes?

SharePoint

company card

All | Files | Sites | People | News | Images | Tools

Feedback

Filters | File type | Last modified

Apply for a company card

https://eemancini.sharepoint.com/sites/Finance/SitePages/Apply-for-a-company-card.aspx

Guidance from the Finance department on how to apply for a company card for the first time.

Published by eemancini

Was this answer useful?

Apply for a company card

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Search & intelligence

Applied Filter: Status: Published

Add bookmark | Exclude a URL | Import | Export | Manage settings

26 items | 1 filter applied

Bookmark title	URL	Modified	Modified By	Keywords
Yammer	https://www.yammer.com/office365	1/7/2020, 12:09 PM		yammer online, yammer login
Word	https://office.live.com/start/Word.aspx?autl	12/9/2021, 10:22 AM		word online, word login, microsoft ...
Windows Help	https://support.microsoft.com/products/wi	5/15/2021, 1:27 AM		windows support, windows help, wi...
Travel Center	https://eemancini.sharepoint.com/sites/trav	9/1/2020, 1:29 PM	emily mancini	travel, flight, trip, travel package, tra...
SharePoint	https://products.office.com/sharepoint/coll	1/7/2020, 12:09 PM		sharepoint online, sharepoint login, ...
PowerPoint	https://office.live.com/start/PowerPoint.asp	12/9/2021, 10:22 AM		powerpoint online, powerpoint logi...
Outlook Web Access	https://outlook.office365.com/owa/	12/9/2021, 10:22 AM		outlook, outlook email login, micros...
OneNote	https://www.onenote.com/notebooks?auth	1/7/2020, 12:09 PM		onenote online, onenote login, my ...
OneDrive for Business	https://onedrive.live.com/about/business	5/15/2021, 1:27 AM		my site, my, my sharepoint, one driv...
Office Online	https://portal.office.com	12/9/2021, 10:22 AM		office online, office 365 online, offic...

Microsoft 365 admin center

Search

Home > Search & intelligence > Bookmarks

Search & intelligence

Insights | Answers | Data sources | Customizations | Configurations

- Acronyms
- Bookmarks
- Floor plans
- Locations
- Q&A

Applied Filter: Status: Published

+ Add bookmark | Exclude a URL | Import | Export

Bookmark title	URL
Yammer	https://www.yammer.com/offi
Word	https://office.live.com/start/W
Windows Help	https://support.microsoft.com
Travel Center	https://eemancini.sharepoint.c
SharePoint	https://products.office.com/sh
PowerPoint	https://office.live.com/start/Po
Outlook Web Access	https://outlook.office365.com/
OneNote	https://www.onenote.com/not
OneDrive for Business	https://onedrive.live.com/abou
Office Online	https://portal.office.com
Office Install Site	http://aka.ms/getoffice
Office 365 Help	https://support.office.com/
Office 365 Admin Center	https://portal.office.com/admi
Microsoft Teams	https://teams.microsoft.com/
Microsoft Search in Bing explore	https://www.bing.com/busines
Microsoft Search in Bing Help	https://go.microsoft.com/fwlin
Microsoft Search Admin portal	https://www.bingforbusiness.c

Apply for a company card

Apply for a company card
https://eemancini.sharepoint.com/sites/Finance/SitePages/Apply-for-a-company-c...
Guidance from the Finance department on how to apply for a company card for the first time.

Title * Characters: 24 / 60
Apply for a company card

URL *
https://eemancini.sharepoint.com/sites/Finance/SitePages/Apply-for-a-company-card....

Description Characters: 91 / 300
Guidance from the Finance department on how to apply for a company card for the fir...

Keywords *
company card × | corporate card × | Enter search terms commonly used to find t

☑ Automatically match similar keywords

Reserved keywords
Enter search terms commonly used to find this page

Categories:
New hire ×

Bookmark settings
Choose when and where this result should be published

- Dates
- Country or region
- Groups
- Device & OS
- Targeted variations

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SharePoint

mexico city

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Mexico City
https://eemancini.sharepoint.com/sites/CDMX

Testing multiple bookmarks on same keyword

Published by eemancini

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Search

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- Acronyms
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- Locations
- Q&A

Applied Filter: Status: Published

+ Add bookmark | Exclude a URL | Import | Export

Bookmark title	URL
Yammer	https://www.yammer.com/offi
Word	https://office.live.com/start/W
Windows Help	https://support.microsoft.com
Travel Center	https://eemancini.sharepoint.c
SharePoint	https://products.office.com/sh
PowerPoint	https://office.live.com/start/Po
Outlook Web Access	https://outlook.office365.com/
OneNote	https://www.onenote.com/not
OneDrive for Business	https://onedrive.live.com/abou
Office Online	https://portal.office.com
Office Install Site	http://aka.ms/getoffice
Office 365 Help	https://support.office.com/
Office 365 Admin Center	https://portal.office.com/admi
Microsoft Teams	https://teams.microsoft.com/
Microsoft Search in Bing explore	https://www.bing.com/busine
Microsoft Search in Bing Help	https://go.microsoft.com/fwlin
Microsoft Search Admin portal	https://www.bingforbusiness.c

Apply for a company card

Dates

- (●) Always available
- ( ) Choose start or end date

Country or region

- (●) Available in all countries/regions
- ( ) Select specific countries/regions

Groups

- ( ) Only people with access to this link
- (●) Everyone in your organization
- ( ) Specific groups in your organization

Device & OS

- (●) All devices
- ( ) Select specific devices and OS

Targeted variations

You can target different bookmark content to different users based on the user's device and location

+ Add a variation

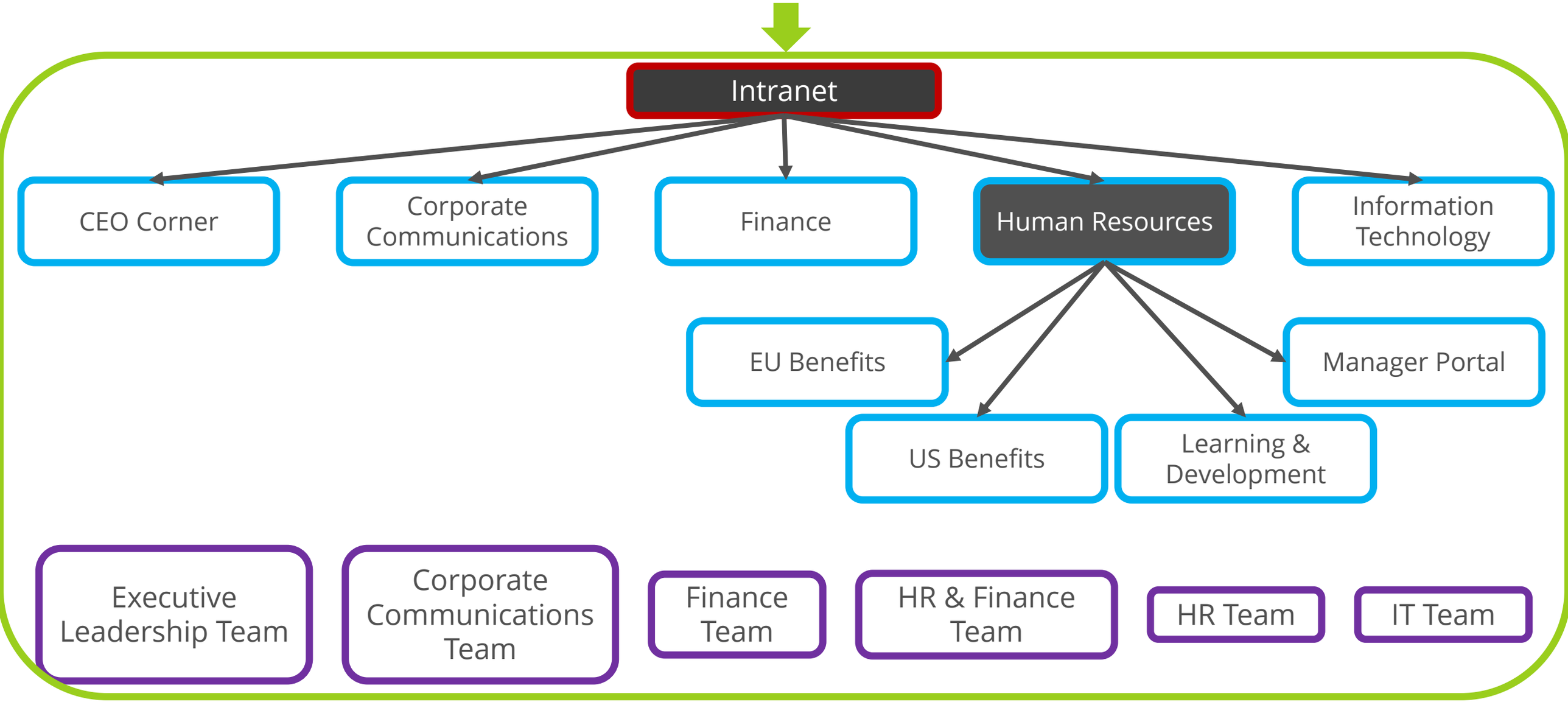
PowerApp

App ID

Enter the App ID for the PowerApp

Publish | Save to draft

Search bookmarks are only available from the root site



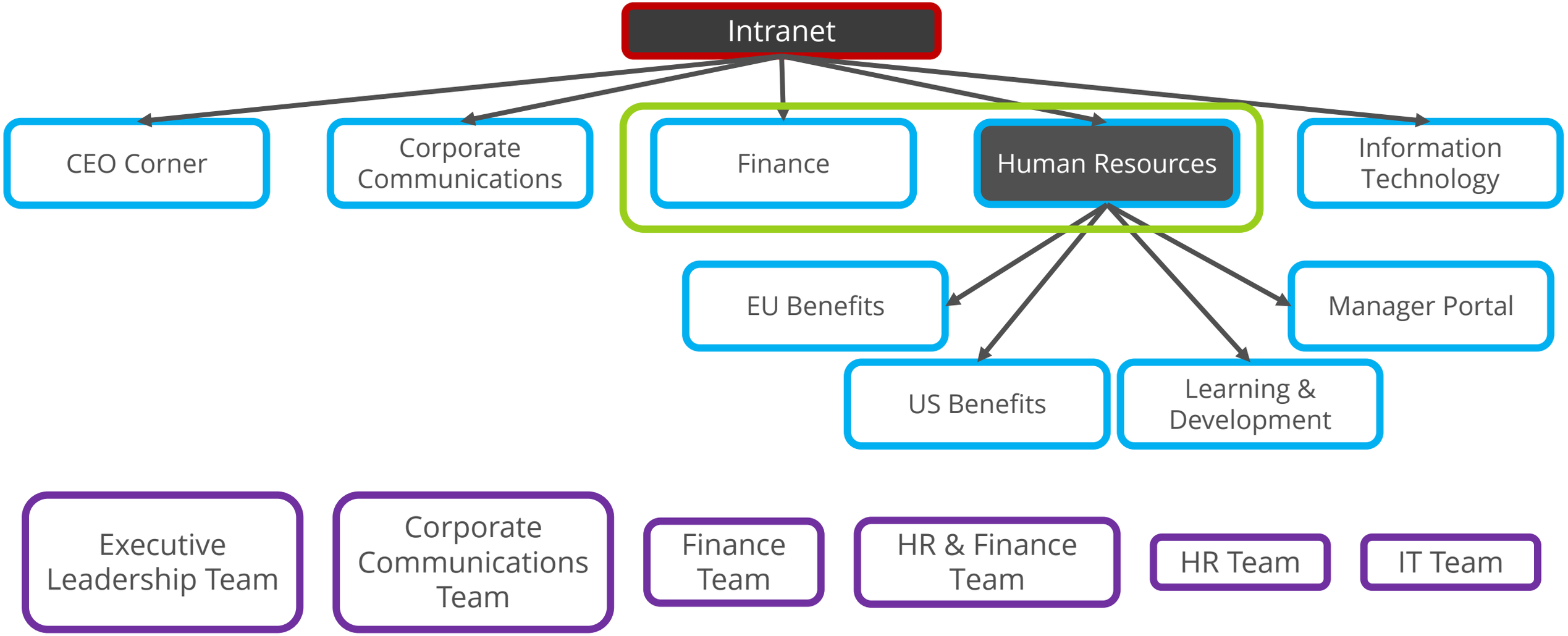
KEY: Hub Site | Communication Site | Team Site | Home Site | → Associated Site (to Hub)

But how do I surface content across peer site collections?

Role	Need	Outcome Objective
An individual contributor	Find the company policy for expenses	Comply
A new hire	Apply for a company card	Make purchases in approved method
A manager	Train individual contributor on business process	To empower growth and advancing skills

Gibbons, Sarah. "User Need Statements: The 'Define' Stage in Design Thinking." *Nielsen Norman Group*, 2019, https://www.nngroup.com/articles/user-need-statements/.

Centralizing content across peer site collections



KEY: Hub Site | Communication Site | Team Site | Home Site | → Associated Site (to Hub)

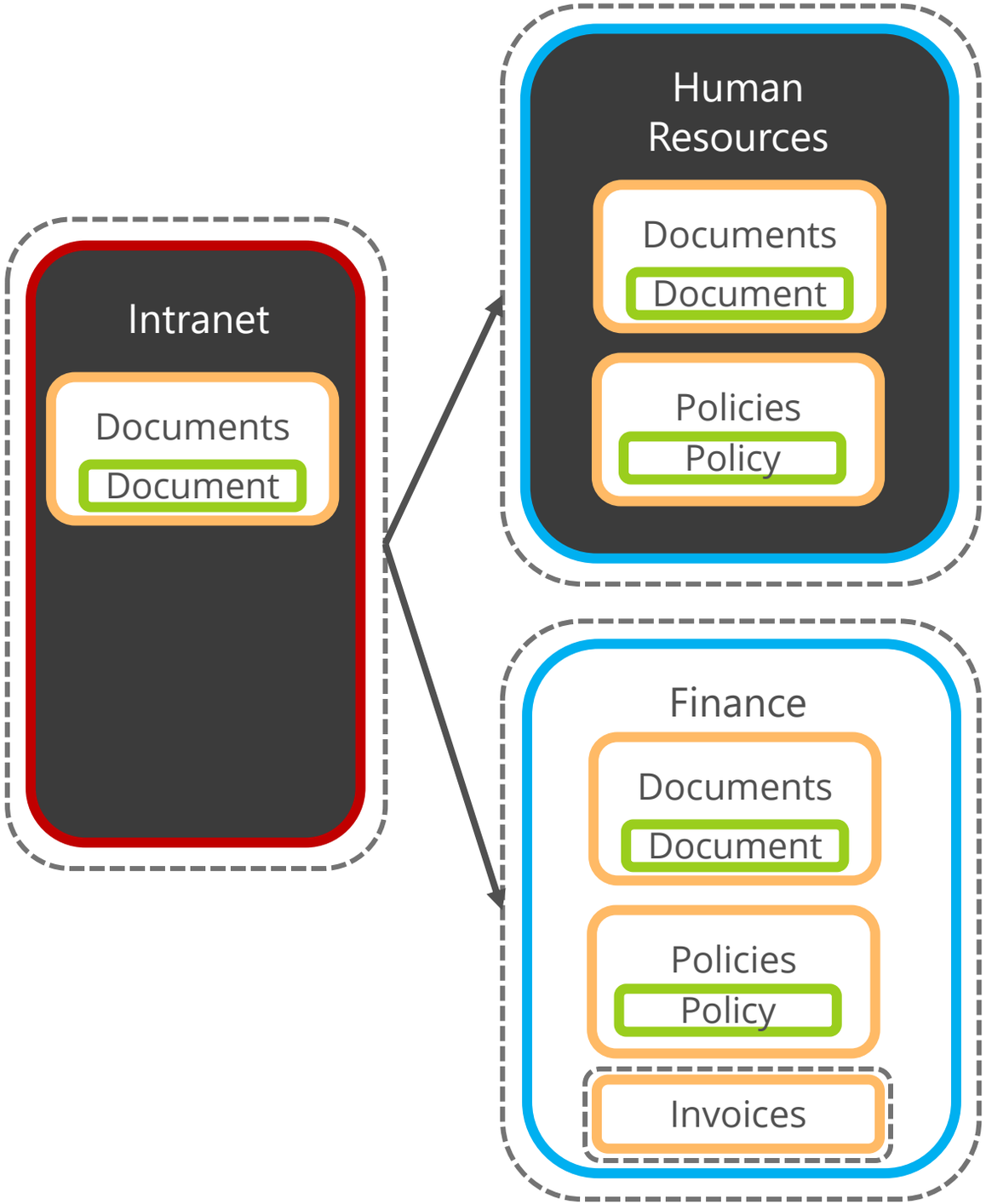
Step 1: Create a robust information architecture

What are content types?

- Can be a document, list item, or folder

- Pulls together an item and information about the item:
  - Metadata (through site columns and content type name)
    - Ability to require metadata
  - Template (for documents only)
  - Information management settings

Learn more: Introduction to content types and content type publishing - Microsoft Support



KEY

Hub Site

Home Site

Communication Site

Separate Permissions

Library

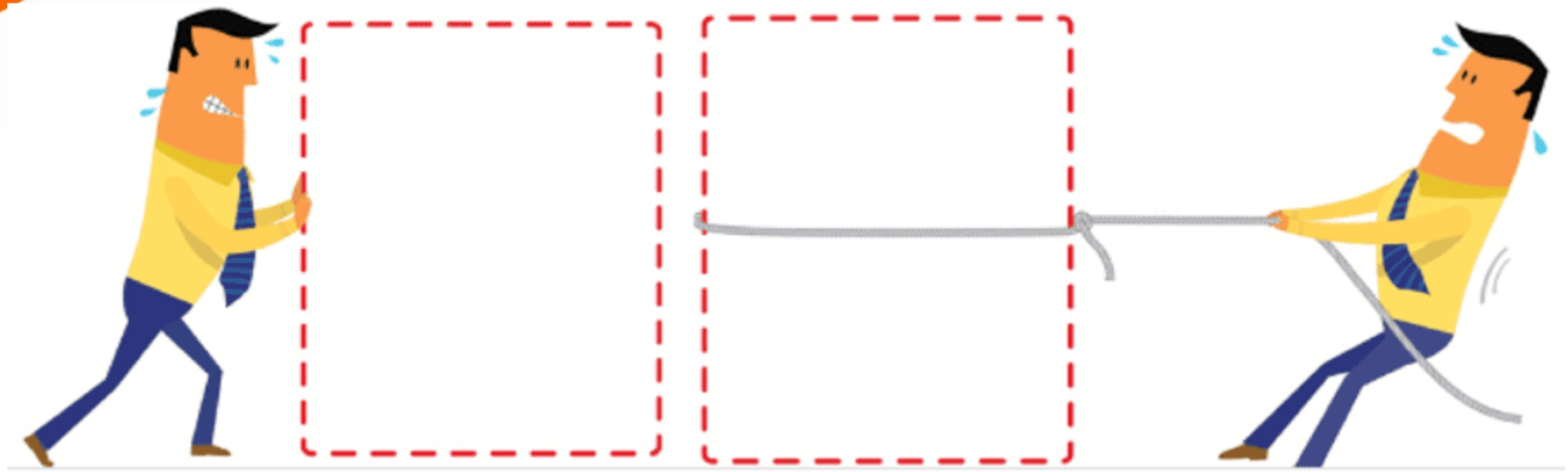
Content type

Link

What is content type publishing?

- Centralized content type management in the Content type gallery in SharePoint admin center
- Ability to add custom content types across some or all site collections
- A site collection at sites/ContentTypeHub

Content type publishing



Before Sept. 2021:
Push to all sites

After Sept. 2021:
Pull as needed

Microsoft 365 Template Options

Solution	Across Site Collections	Metadata	Document Libraries	Pages	Permissions	Flows	List Formatting	Requires Code
Content Type Gallery	Yes	Yes	No	No	No	No	No	No
Page Templates	No	Yes, for the page itself	No	Yes	No	No	No	No
Third-party migration tools (Sharegate)	Yes	Yes	Yes	Yes	Yes	No	Yes	No
Third-party template tools (Orchestry)	Yes	Yes	Yes	Yes	Yes	No	No	No
Site Templates	Yes	Yes	Yes	No	Yes	No	Yes	JSON PowerShell
PnP Provisioning Templates	Yes	Yes	Yes	Yes	Yes	No	Yes, with custom code	XML PowerShell

https://eemancini.sharepoint.com

https://eemancini.sharepoint.com/sites/contentTypeHub/_layouts/15/SiteAdmin.aspx#/contentTypes

SharePoint

Search

Microsoft Search

Content services

Term store

Content type gallery

Team Site

Content type gallery

Return to classic

Create and manage the content types available on this site. Content types visible on this page can be used on this site and its subsites.

Content type publishing has changed. To sync and use published content types from content type hub to a site, user needs to add content types from the modern add content type panel to list or document library in their site. Learn more about content type publishing.

Create content type

Search content types

All Items

Site content type	Parent	Category	Last publish
Announcement	Item	List Content Types	
Audio	Rich Media Asset	Digital Asset Content Types	
Base EEMANCINI Document	Document	_EEMancini	
Basic Page	Document	Document Content Types	
Benefits Overview	HR Page	_EEMancini	Jun 9 202
Category	Item	Community Content Types	
Circulation	Item	Group Work Content Types	
Comment	Item	List Content Types	
Community Member	Site Membership	Community Content Types	

SharePoint

Search in SharePoint

Travel | Destinations | Travel Assistance | Departments | Edit

Travel

Home | Beach | City | Wilderness | Travel Star | Example Document | Work progress tracker | Issue tracker | Edit

+ Create site | Following | Share

+ New | Page details | Analytics

Pending approval | Edit | Review approvals

News

See all

+ Add

TRAVEL

New excursion offering: Road to Hana

We have a new offering to take the road to...

Marc Anderson July 1, 2021

Key West

Key West reopens to visitors

The Florida Keys will reopen its doors to tourists next month, ending a more...

Jane Pawsten April 22, 2021

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Key West votes to limit cruise ship passengers. Now legislators want to veto that vote. | Commentary - msn.com

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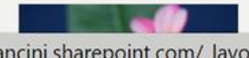
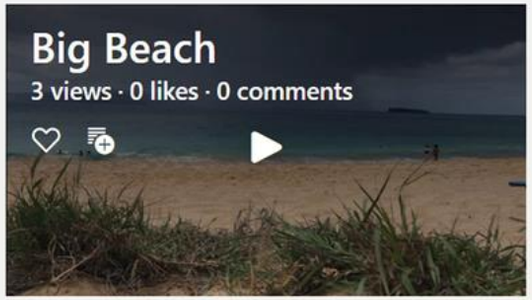
Marc Anderson February 23, 2021



TRAVEL

Ballet Folklórico de México



Big Beach

My sites

See all

- Travel
- C Cats
- B Bogota
- C California
- HR Human Resources

My feed

See all

Emily Mancini
Updated • 44m ago

From Bogota in South America Hub
Bogota

https://eemancini.sharepoint.com/_layouts/15/sharepoint.aspx?&login_hint=emily@eemancini.onmicrosoft.com

Do not go as fast as me ☺

SharePoint

SHARE FOLLOW

EDIT LINKS

Settings ▸ Add Content Types

Home
Documents
Pages
Recent
Policies
Site contents

EDIT LINKS

Content type publishing has changed. Use the new content type panel to view or add recently published content types. To add a content type, go to the library Policies, select **Add column**, and then select **Content type**. Learn more about content type publishing

Select Content Types

Select from the list of available site content types to add them to this list.

Select site content types from:
All Groups

Available Site Content Types:
Allow any content type *
Basic Page
Benefits Overview
Competency Model
Development Overview
Dublin Core Columns
Form
HR Page
JavaScript Display Template

Add >

< Remove

Content types to add:

Description:
Allows users to upload documents of any content type to a library. Unknown documents will be treated as their original content type in client applications.

Group: Special Content Types

OK Cancel

SharePoint

Search this library

CC

Corporate Communications

Home | Documents | Pages | Policies | Site contents | Edit

Share

New | Edit in grid view | Open | Share | Download | Delete | Pin to top | ···

1 selected | All Documents

Policies

Name	Modified	Modified By	+ Add column
Test 2.docx	A few seconds ago	Emily Mancini	

SharePoint

Search

Microsoft Search

Content services

Term store

Content type gallery

Corporate Communications

Content type gallery

Return to classic

Create and manage the content types available on this site. Content types visible on this page can be used on this site and its subsites.

Content type publishing has changed. Use the new content type panel to view and add recently published content types. To add a content type, go to the library, select Add column, and then select Content type. Learn more about content type publishing.

Create content type

policy

All Items

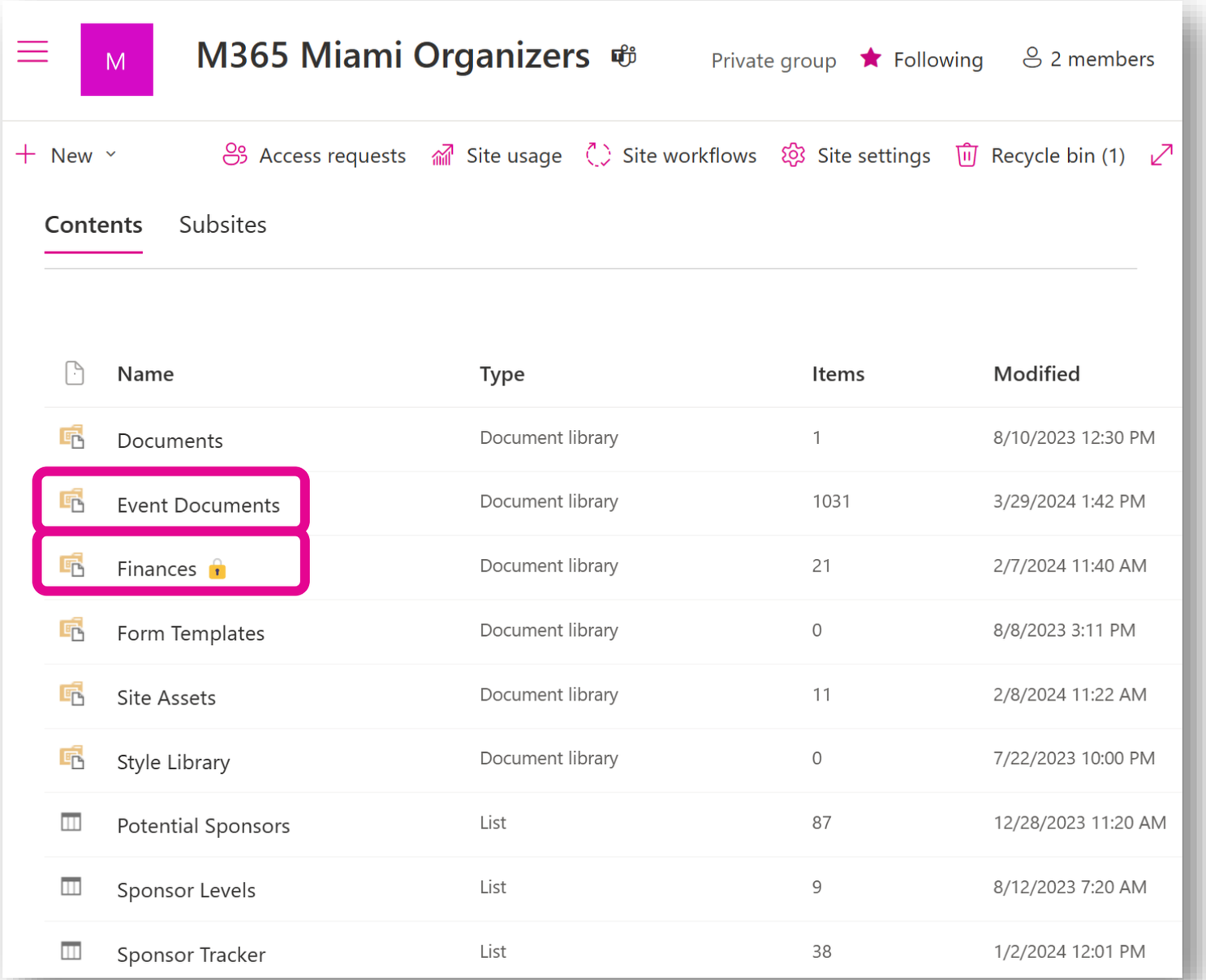
Parent	Category	Source
Document	_EEMancini	Corporate Communications

Name your document library and site columns without spaces

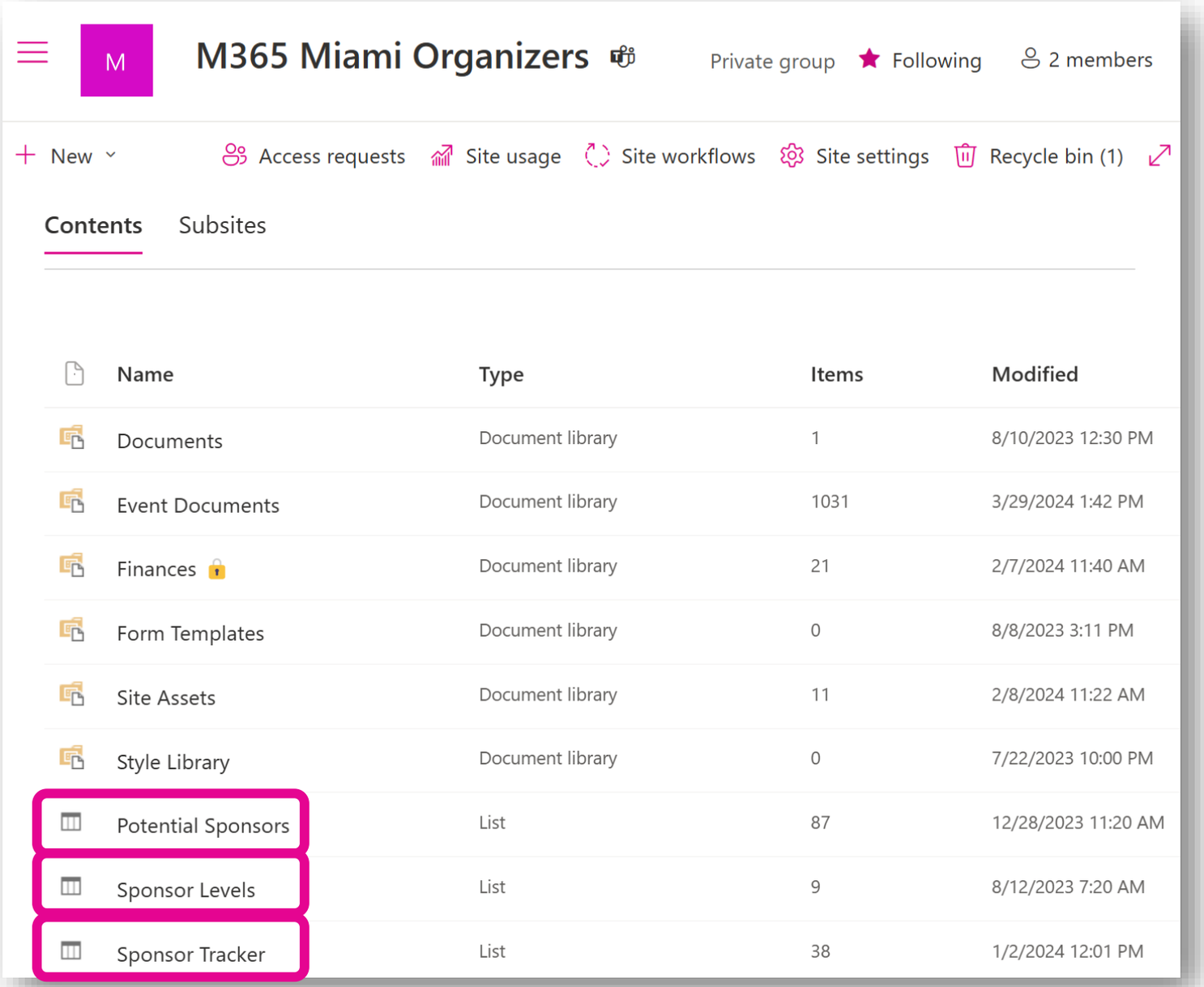
https://leftuncharted.sharepoint.com/sites/M365MiamiOrganizers/EventDocuments/Forms/AllItems.aspx

https://leftuncharted.sharepoint.com/sites/Clients/Event%20Documents/Forms/AllItems.aspx

Use document library titles to provide metadata



Use lookup columns to reduce data entry



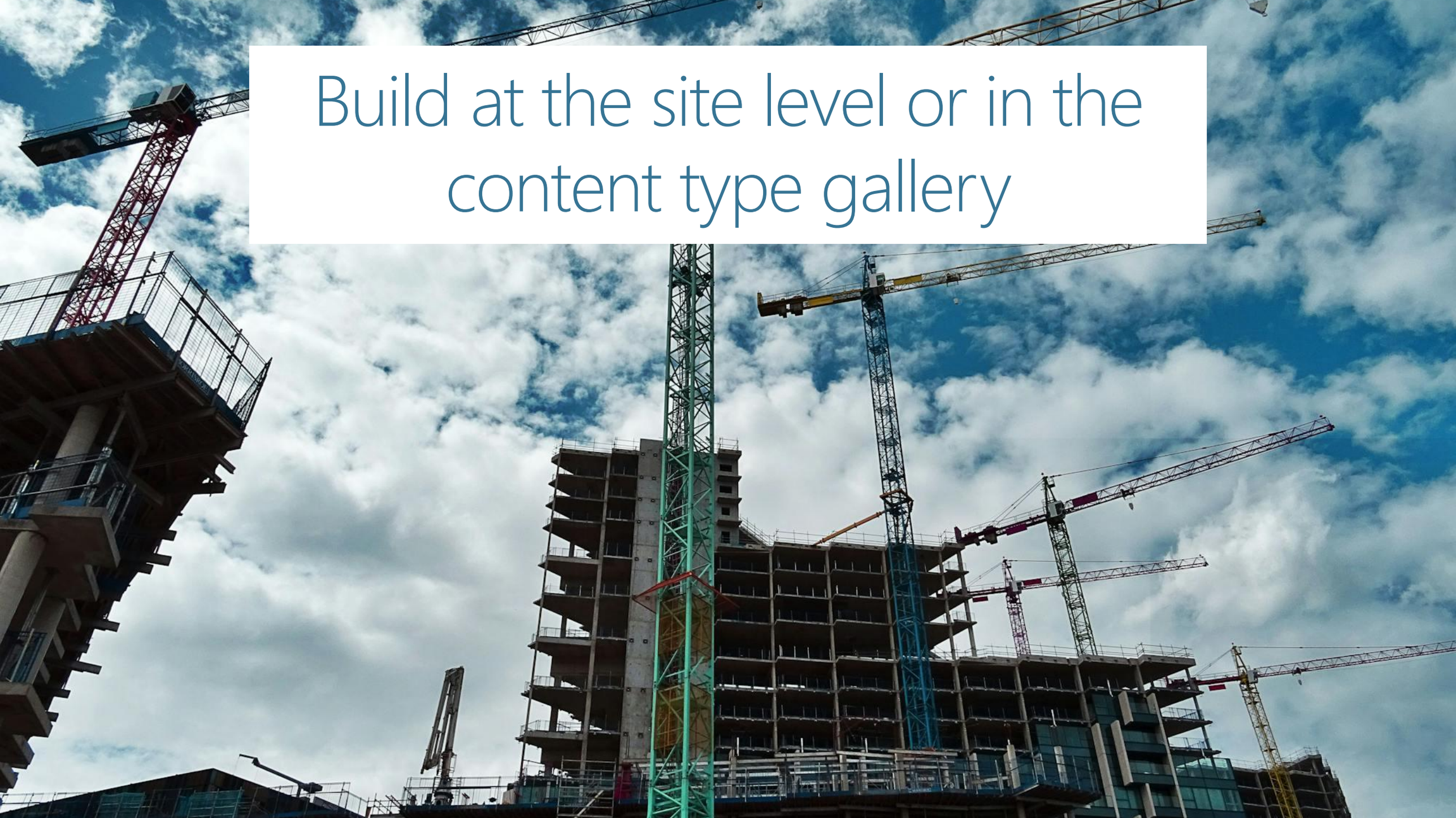
Leave the default content type for “Documents” in libraries with multiple content types

Content Types

This document library is configured to allow multiple content types. Use content types to specify the information you want to display about an item, in addition to its policies, workflows, or other behavior. The following content types are currently available in this library:

Content Type	Visible on New Button	Default Content Type
Document	✓	✓
Policy	✓	
Statement of Work	✓	

Build at the site level or in the content type gallery

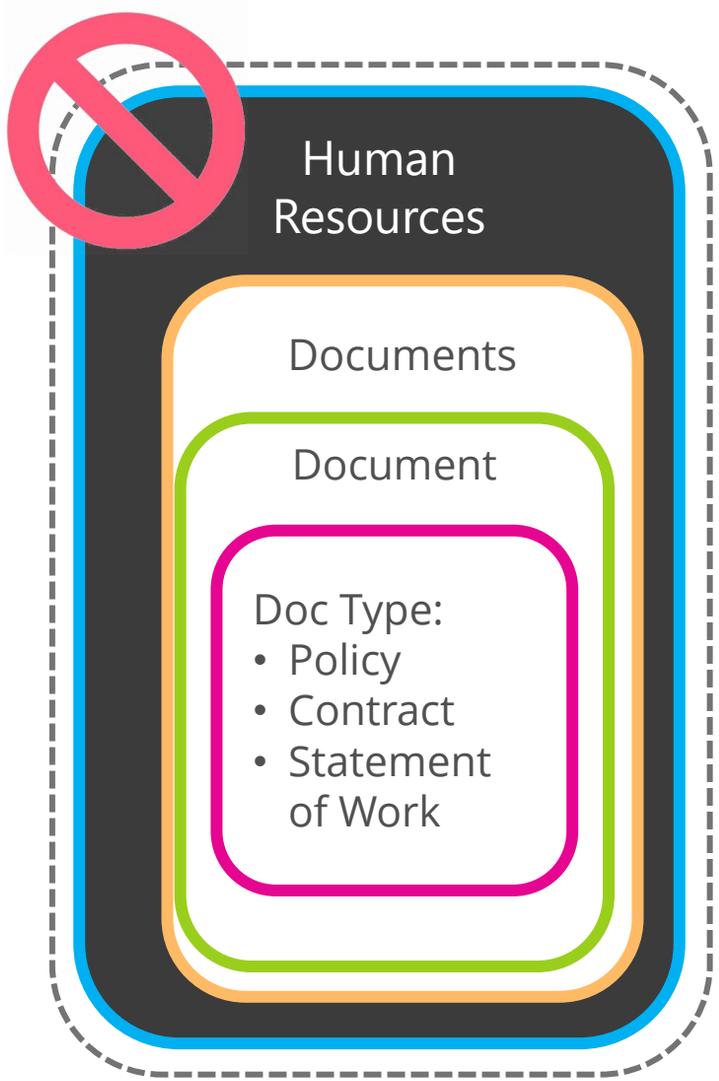


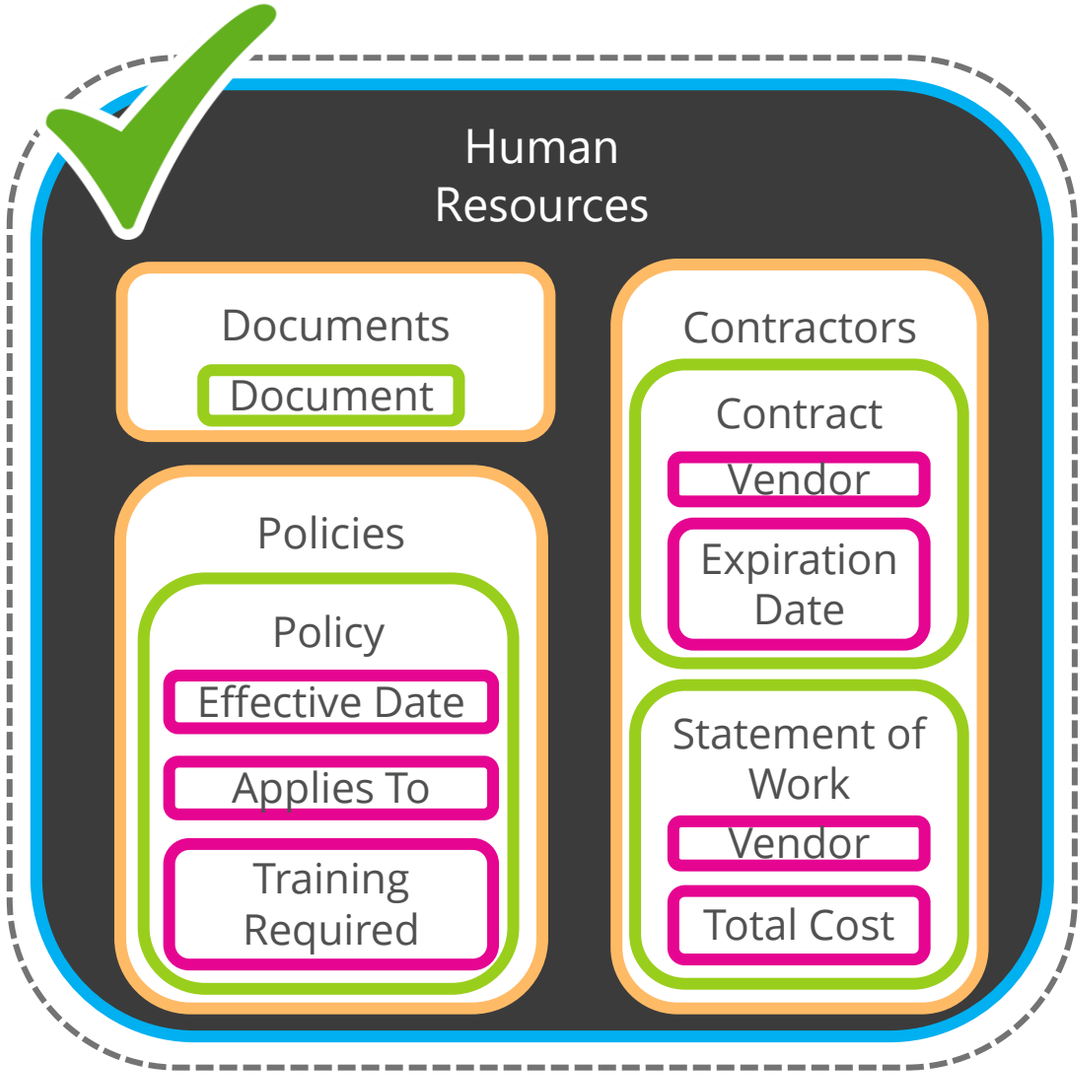
Name a content type as a singular item (“policy” not “policies”)

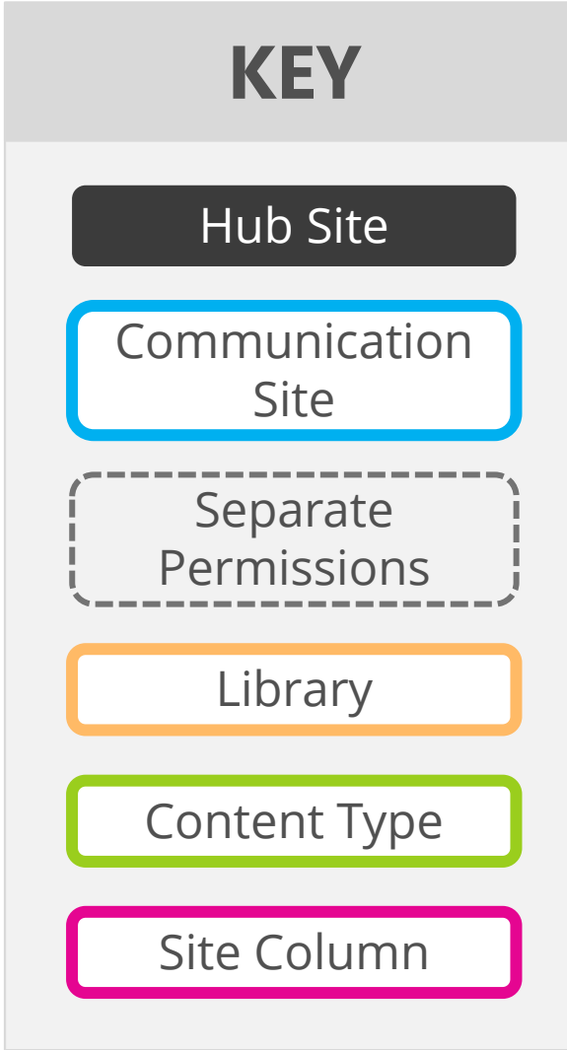
Each document is one policy

Multiple policies can live in a “Policies” library

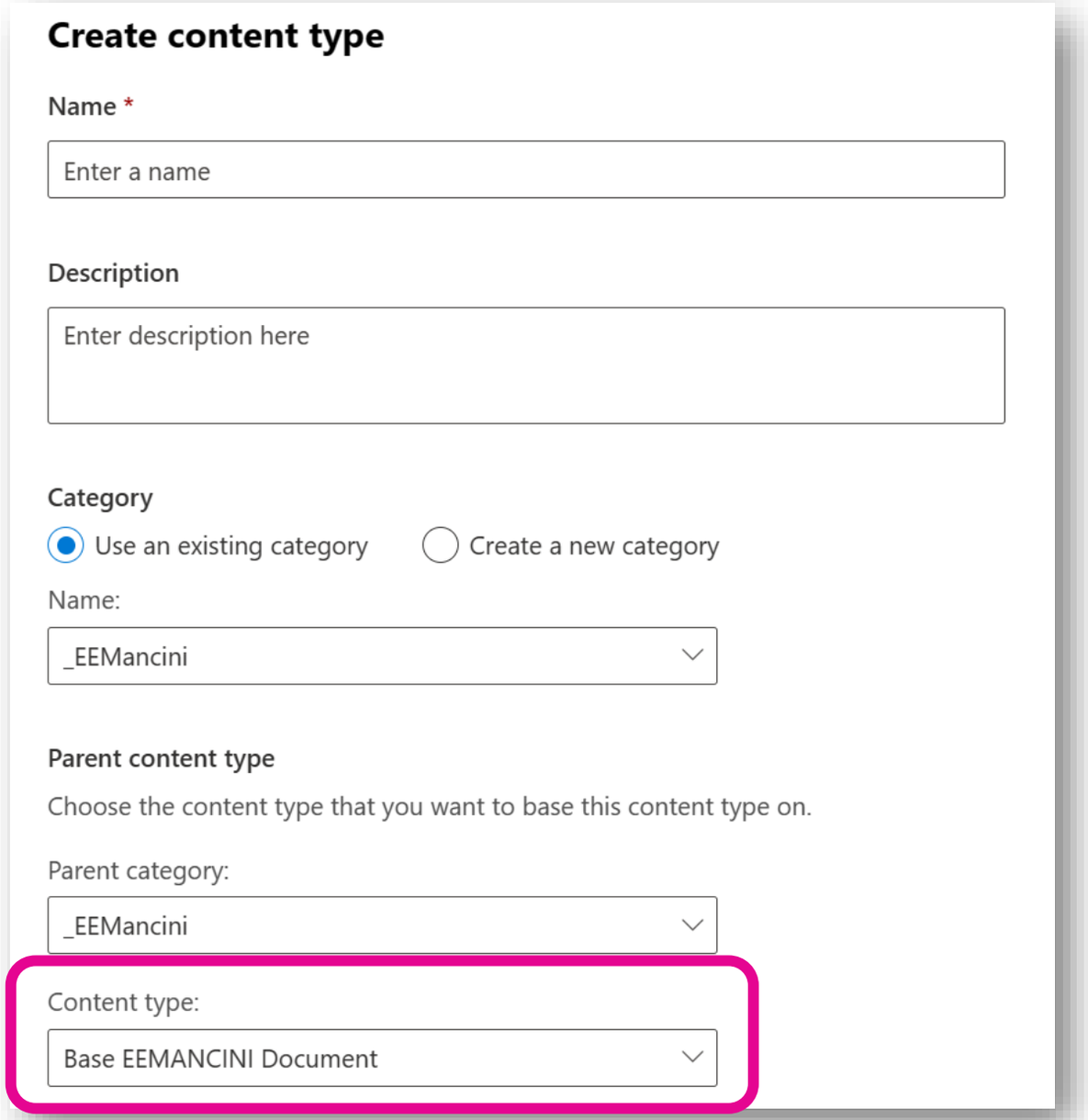
If you have a site column for “Document Type”, those are likely your content types



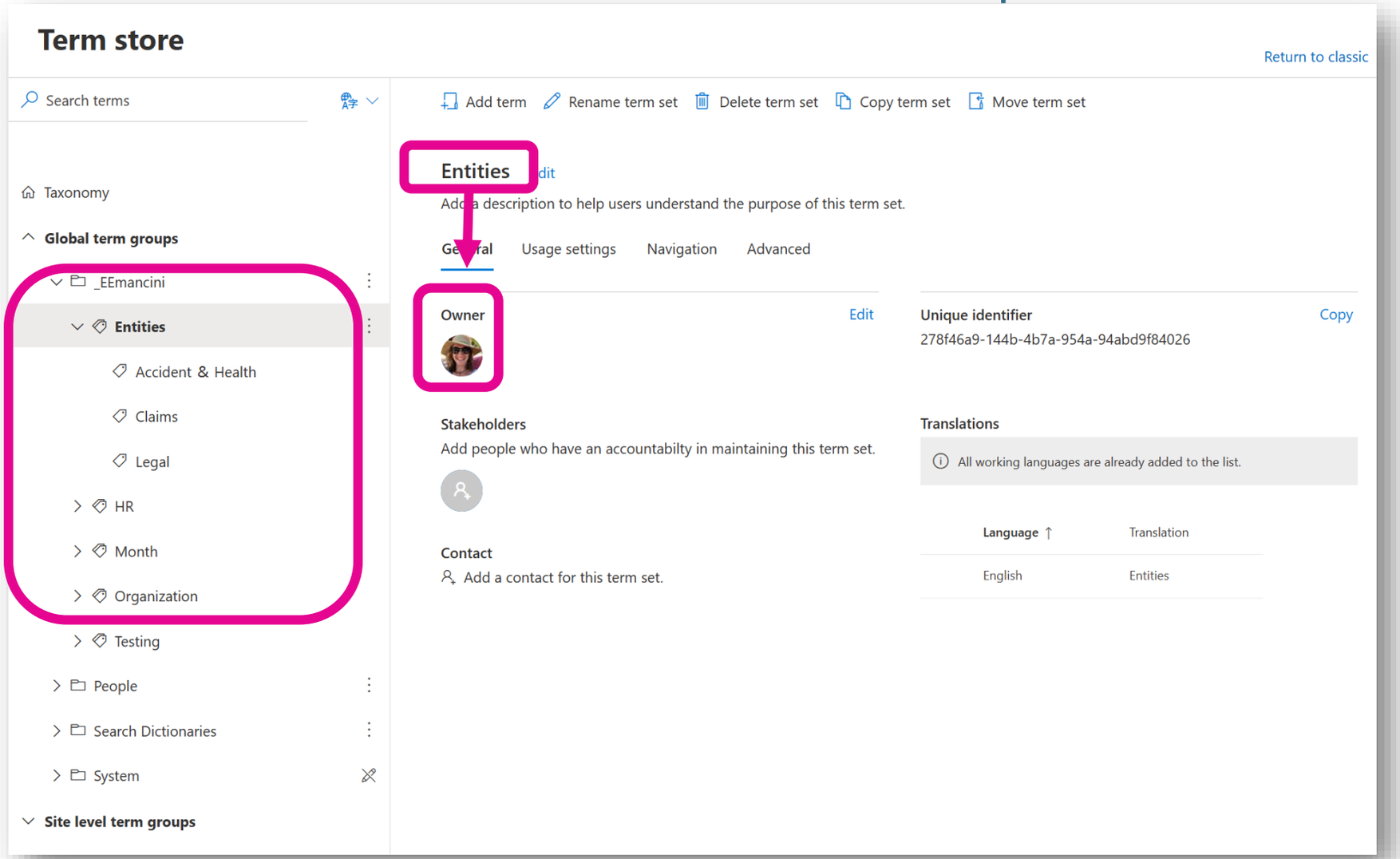




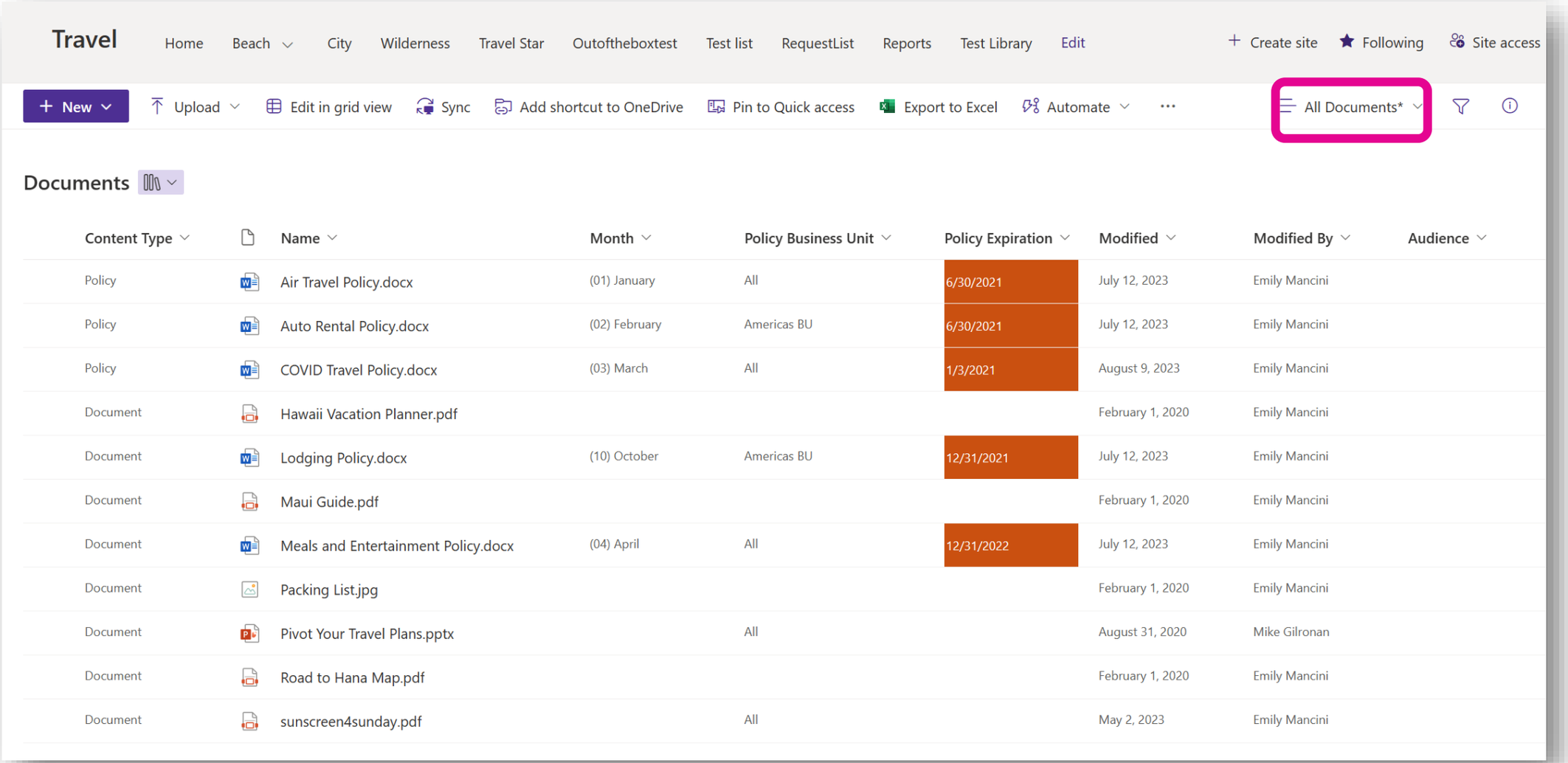
Consider content type inheritance



Map site columns to managed metadata in the Term Store, when possible



Leave “All Documents” view unfiltered and ungrouped



Content Type	Name	Month	Policy Business Unit	Policy Expiration	Modified	Modified By	Audience
Policy	Air Travel Policy.docx	(01) January	All	6/30/2021	July 12, 2023	Emily Mancini	
Policy	Auto Rental Policy.docx	(02) February	Americas BU	6/30/2021	July 12, 2023	Emily Mancini	
Policy	COVID Travel Policy.docx	(03) March	All	1/3/2021	August 9, 2023	Emily Mancini	
Document	Hawaii Vacation Planner.pdf				February 1, 2020	Emily Mancini	
Document	Lodging Policy.docx	(10) October	Americas BU	12/31/2021	July 12, 2023	Emily Mancini	
Document	Maui Guide.pdf				February 1, 2020	Emily Mancini	
Document	Meals and Entertainment Policy.docx	(04) April	All	12/31/2022	July 12, 2023	Emily Mancini	
Document	Packing List.jpg				February 1, 2020	Emily Mancini	
Document	Pivot Your Travel Plans.pptx		All		August 31, 2020	Mike Gilronan	
Document	Road to Hana Map.pdf				February 1, 2020	Emily Mancini	
Document	sunscreen4sunday.pdf		All		May 2, 2023	Emily Mancini	

Step 2: Surface content in context through web parts

Option 1: Highlighted Content Web Part

What is the Highlighted Content web part?

- Out of the box web part
- Successor to Content Query and Content Search web parts
- Display content from multiple sources in one place on a page
- Custom query in KQL, CAML, and/or Managed Properties

https://eemancini.sharepoint.com Travel - Home

https://eemancini.sharepoint.com

SharePoint Search

Microsoft Search

Content services

Term store

Content type gallery

Content type gallery > Policy

Edit Publish Settings Delete

Policy

Category

_EEMancini

Parent

Document

Content Type ID

0x01010072A7B15B3D024647914F182EB057ED9D

Site columns

Add and manage the site columns that are a part of this content type.

Add site column

Name	Type	Required	Source
Name	File	Yes	Docume
Title	Single line of text	No	Item
Policy Expiration	Date and Time	No	Policy

OUT OF THE BOX SOLUTION

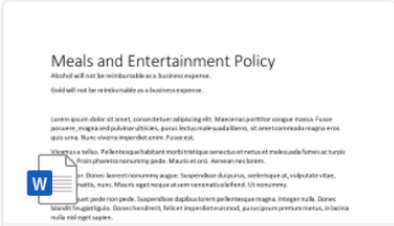
Policy Center

Name or email address

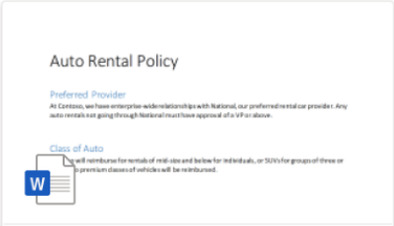
Most recent documents

Travel
Air Travel Policy
Emily Mancini
Edited May 19, 2022

Travel
COVID Travel Policy
Mike Gilronan
Edited Sep 11, 2020



Travel
Meals and Entertainment Policy
Mike Gilronan
Edited Sep 11, 2020



Travel
Auto Rental Policy
Mike Gilronan
Edited Sep 11, 2020

Comments

Off

Highlighted content

Select the content you want to highlight, and choose layout options.

Learn more

Use a basic filter to narrow search results, or use a custom query with CAML or KQL code.

- Filter
- Custom query

Query

Source

All sites in the hub

SiteID or WebID values are provided based on your selections under Source, and will be appended to your query text.

(DepartmentId:f93d921f-51ed-4bf1-aa24-f(

Query text (KQL)

SPContentType: Policy

Apply

Highlighted Content web part configuration

Sort by:

- Most recent
- Most viewed
- Trending
- Managed property ascending
- Managed property descending

No filters

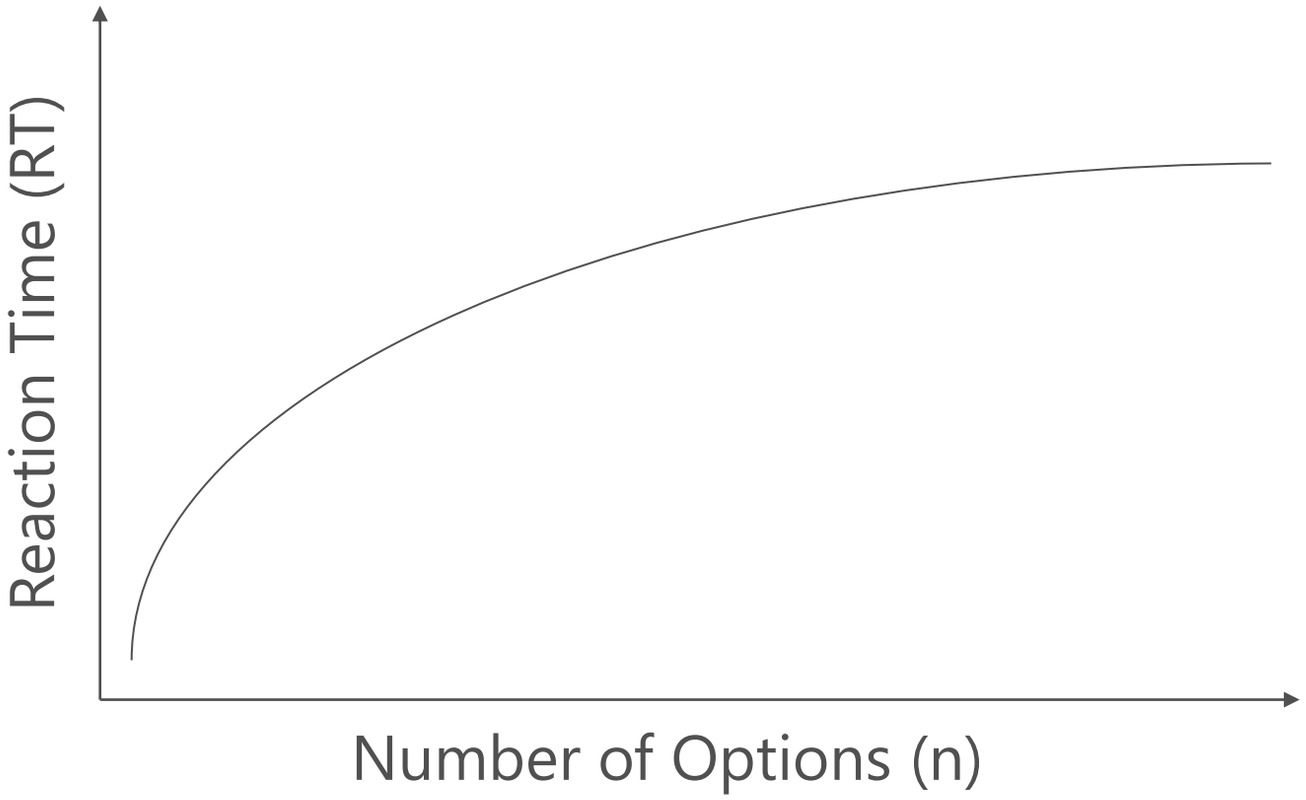
No search

Layout:

- Grid
- List
- Carousel
- Compact
- Filmstrip

No custom views

Hick-Hyman Law



$RT = a + b \log_2(n)$

RT is the Reaction Time

(n) Is the number of stimuli

a and **b** are constants

Step 2: Surface content in context through web parts

Option 2: Modern PnP Search Web Part

What is the Modern PnP Search web part?

- Microsoft community open-source web part
- Search box, search results, search filters, and search verticals web parts
- Supported extensions include custom web components, handlebars customization, event handlers for adaptive card actions, and suggestions providers

SharePoint

Search in SharePoint

Travel | Destinations | Travel Assistance | Departments | Edit

Travel

Home | Beach | City | Wilderness | Travel Star | Example Document | Work progress tracker | Issue tracker | Edit

+ Create site | Following | Share

+ New | Page details | Analytics

Pending approval | Edit | Review approvals

News

See all

+ Add

Cats

Testing not org news

Emily Mancini September 12

TRAVEL

New excursion offering: Road to Hana

We have a new offering to take the road to Hana in Maui!

Marc Anderson July 1, 2021

Key West

Key West reopens to visitors

The Florida Keys will reopen its doors to tourists next month, ending a more...

Jane Pawsten April 22, 2021

Key West

Key West votes to limit cruise ship passengers. Now legislators want to veto that vote. | Commentary - msn.com

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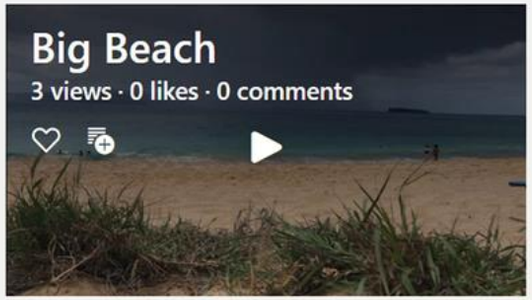
Ballet Folklórico de México



Big Beach

My sites

See all

- Travel
- C Cats
- B Bogota
- C California
- HR Human Resources

My feed

See all

Trending

From Bogota in South America Hub

Bogota

Policy Center

Policy Center

Our company policies are managed by each working group, and we've made this single view so you don't need to worry who owns any given policy. You can search for specific words in the policies and filter by the Department Owners and other key attributes of the policies.

Enter a keyword

Policies Policy Owners

Filters

Department Owner

Search a value...

- Human Resources (7)
- Marketing (3)
- Procurement (6)

18 results

Title	Summary
Sexual Harrassment Policy	Policy brief & purpose Our sexual harassment policy aims to protect men and women in our company from unwanted sexual advances and give them guidelines to report incidents. We will...
Corporate Giving Policy	

But how do I surface content in a specific order?

Role	Need	Outcome Objective
An individual contributor	Find the company policy for expenses	Comply
A new hire	Apply for a company card	Make purchases in approved method
A manager	Train individual contributor on business process	To empower growth and advancing skills

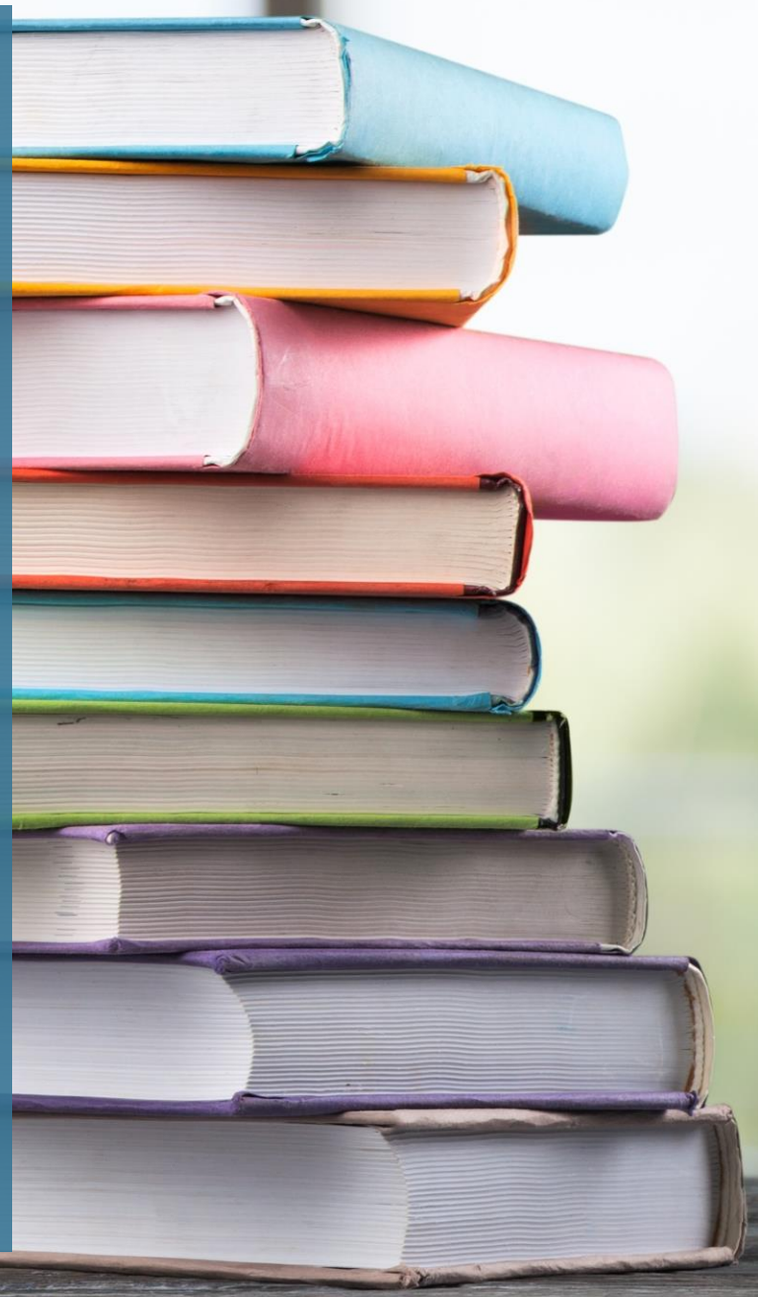
Gibbons, Sarah. "User Need Statements: The 'Define' Stage in Design Thinking." *Nielsen Norman Group*, 2019, https://www.nngroup.com/articles/user-need-statements/.

What is Learning Pathways?

- Customizable online learning platform
- A site collection and web part
- Supports content in 10 languages
- Open-source

What is *in* Learning Pathways?

- Microsoft created content
- Custom content through SharePoint pages or external content (supported in iFrame)



Intranet | Company Info | Departments | Resources

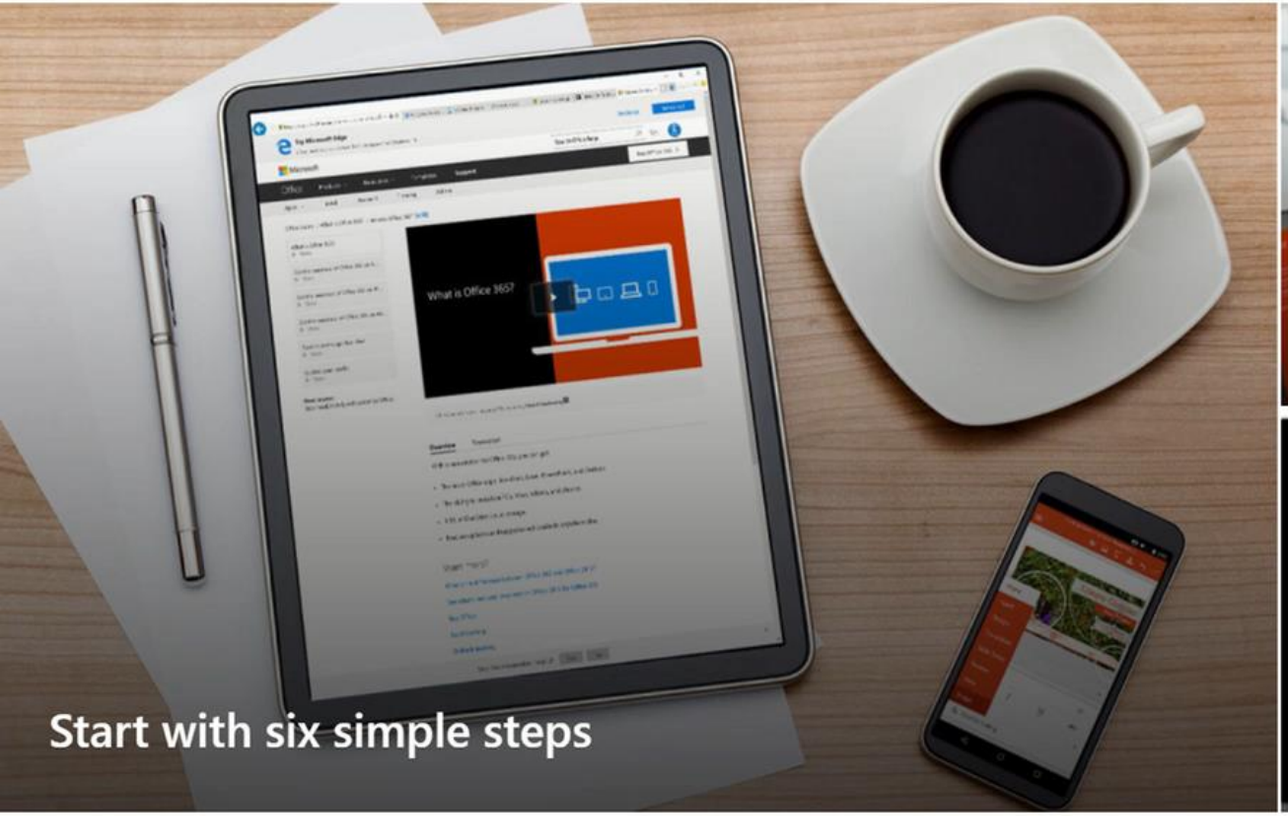
Microsoft 365 learning pathways

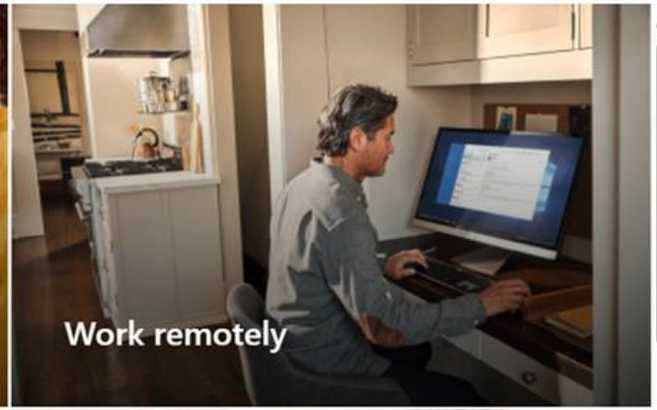
Home | Microsoft 365 training | Ask questions and get help | Edit

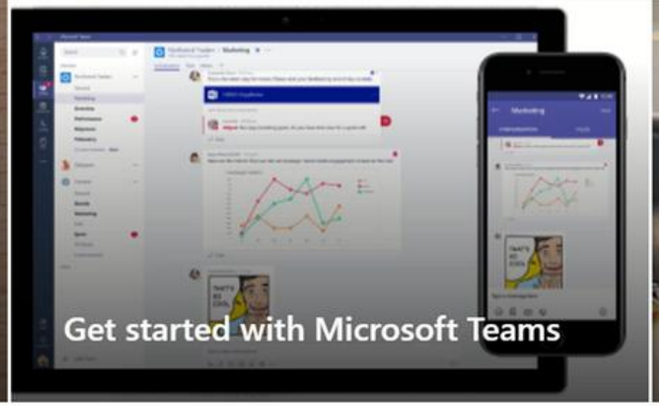
Following | Site access | English

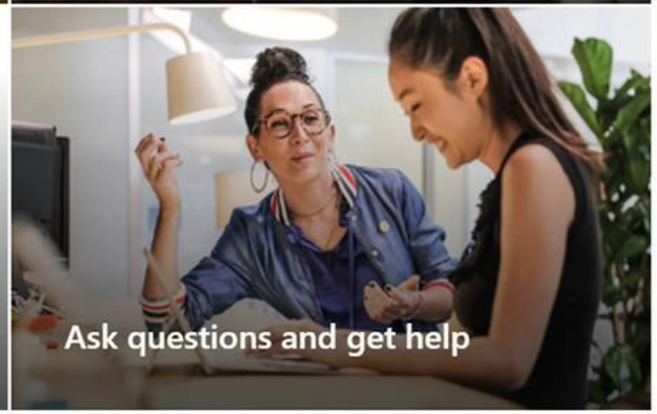
+ New | Translation | Page details | Analytics

Published 5/8/2023 | Share | Edit









Get started with the Admin Success Center

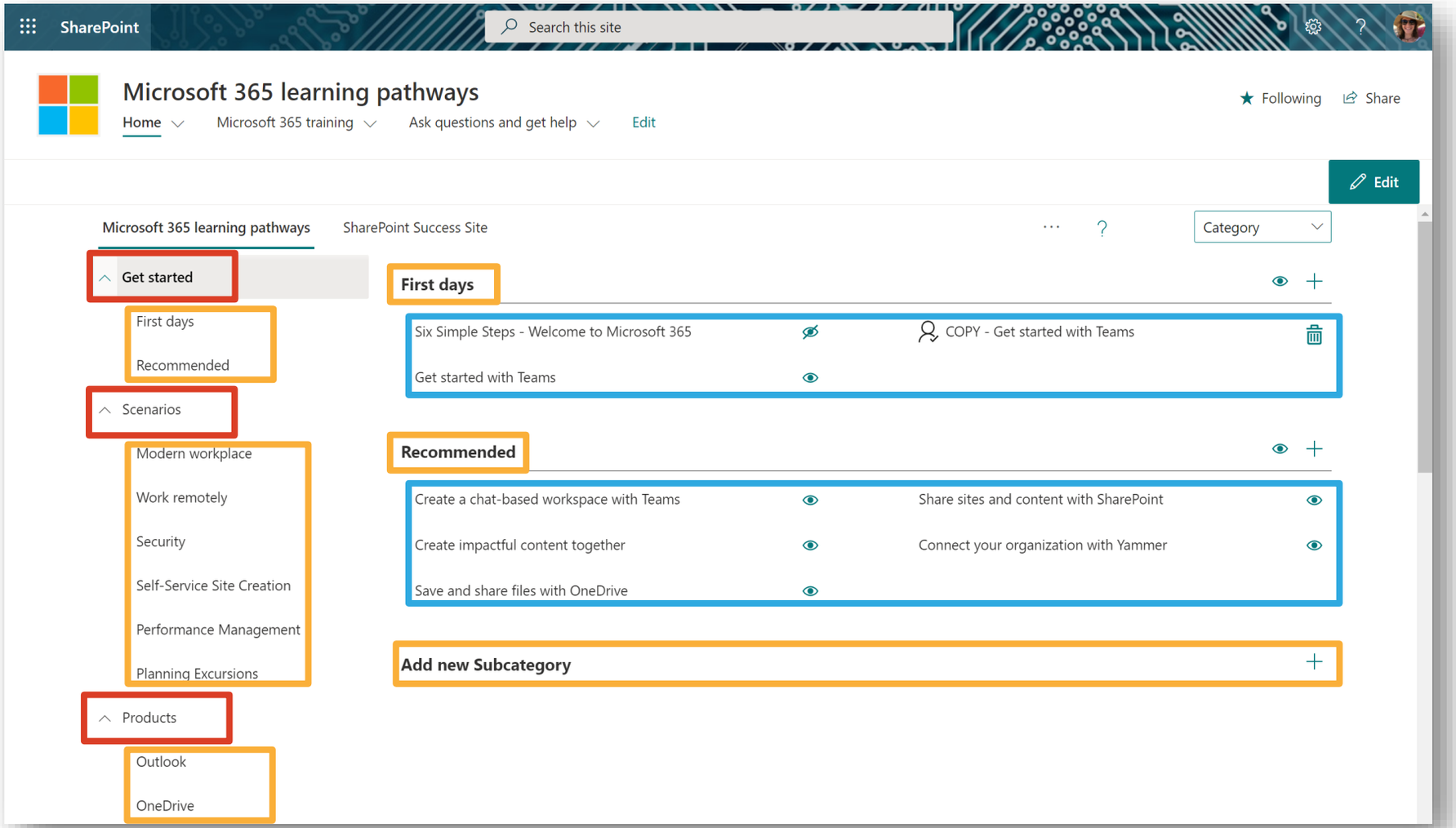
News

+ Add

Why Learning Pathways?

- Brings Microsoft content into your tenant
- Creates central repository for all training materials
- Provides support for other training modalities (classroom, in-person, online)
- Decentralizes content creation and support model

Learning Pathways Components

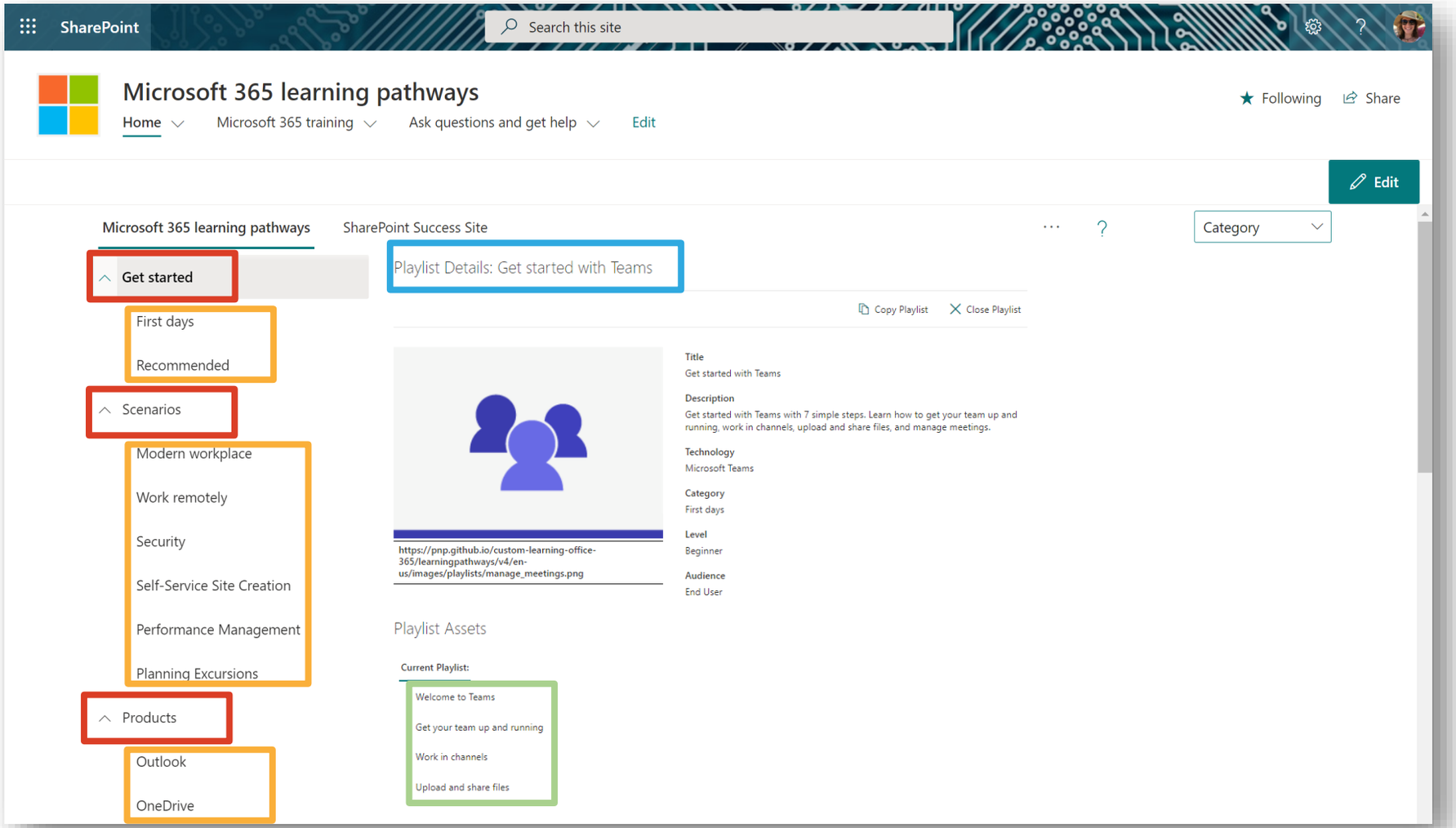


1. Category

2. Sub-Category

3. Playlist

Learning Pathways Components



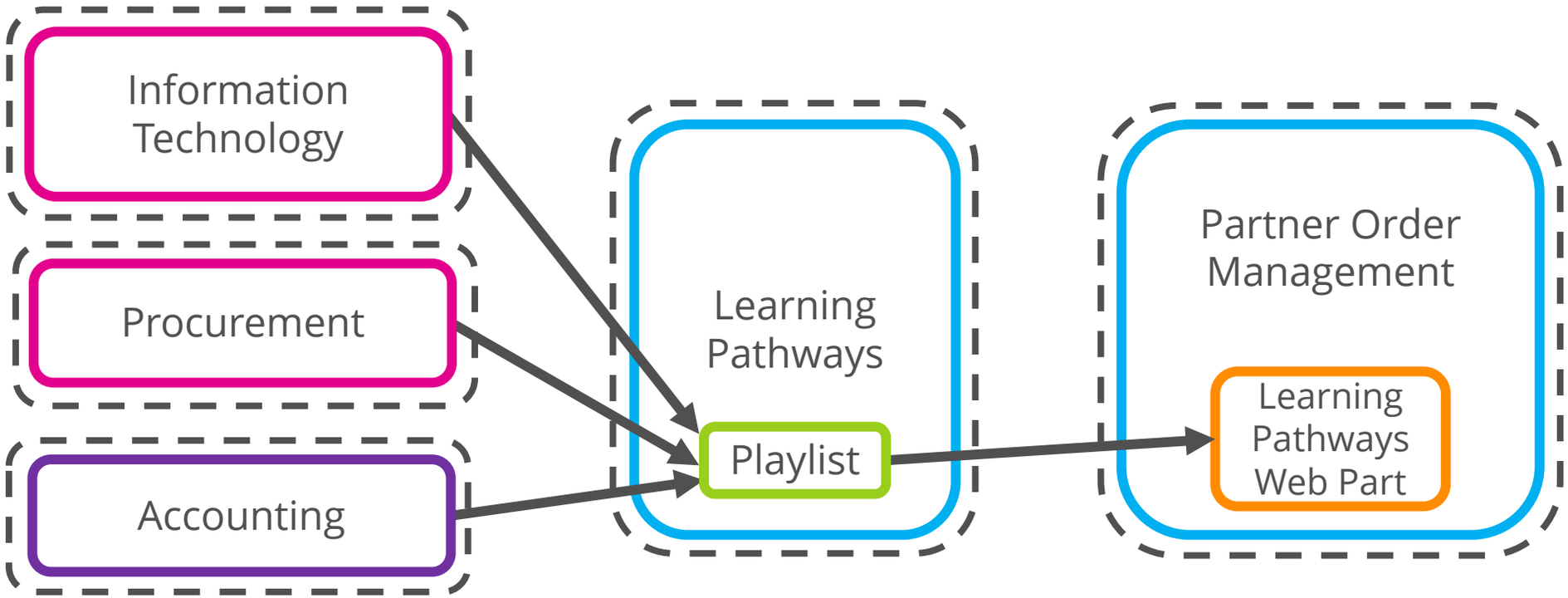
1. Category

2. Sub-Category

3. Playlist

4. Asset

Document your cross-functional business process



KEY: Communication Site | Team Site | Site Page | Web Part | → Associated Site (to Hub)

Partner Order Management allows your to easily create quotes with our custom built solution. With a centralized location for all pricing it is easy to generate quotes for the wizards and muggles in your life. It may not be magic, but it is a lot easier than our previous Excel sheet with macros!

Manage Orders with Hogwarts Partners

Create a Quote | Add a Partner | Review All Partner Quotes

Hogwart's Pricing Solution

Choose the courses that suit you best

Setting Up New Partners

Actions to add new houses and partners

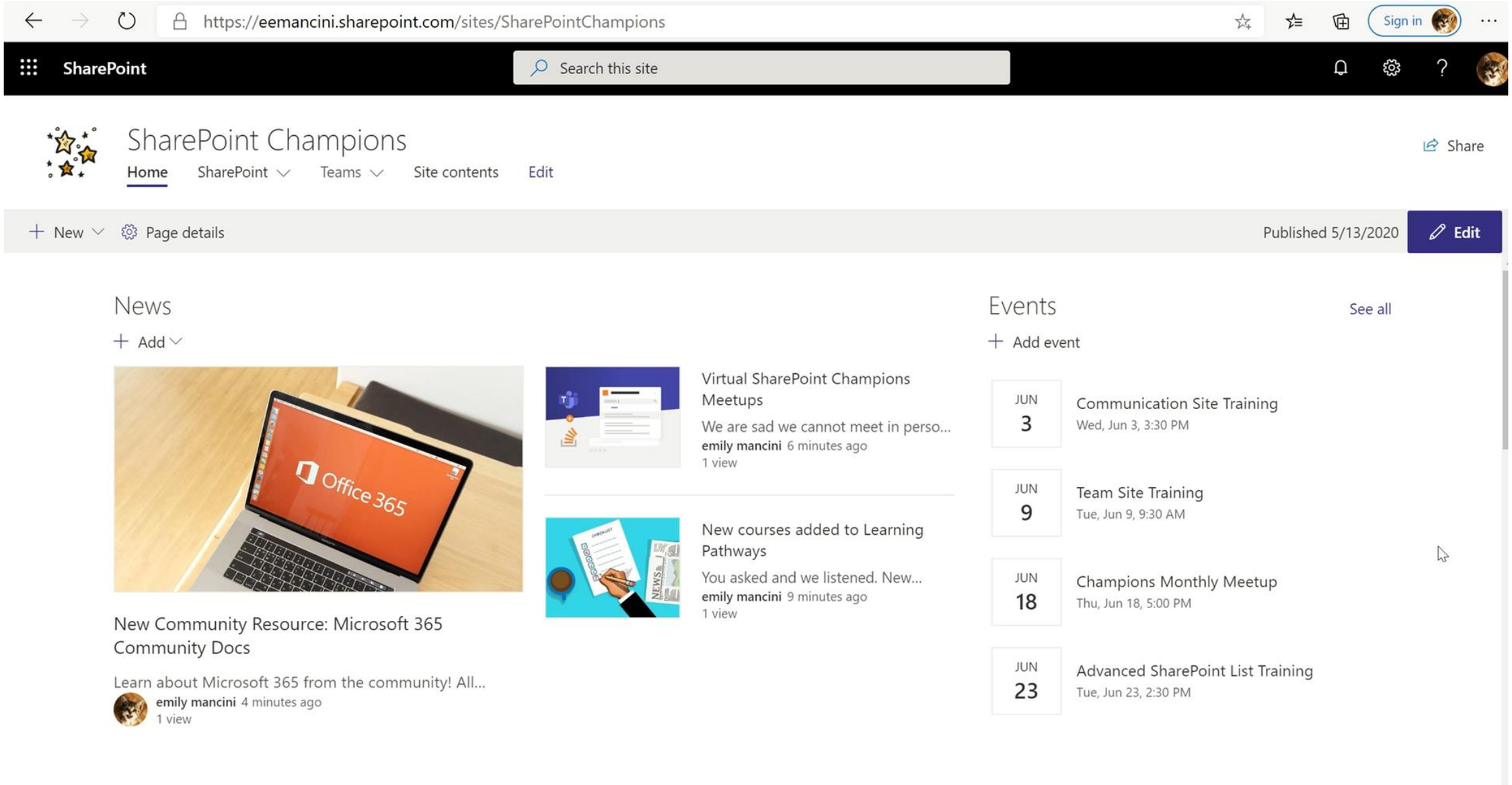
All

Managing Orders

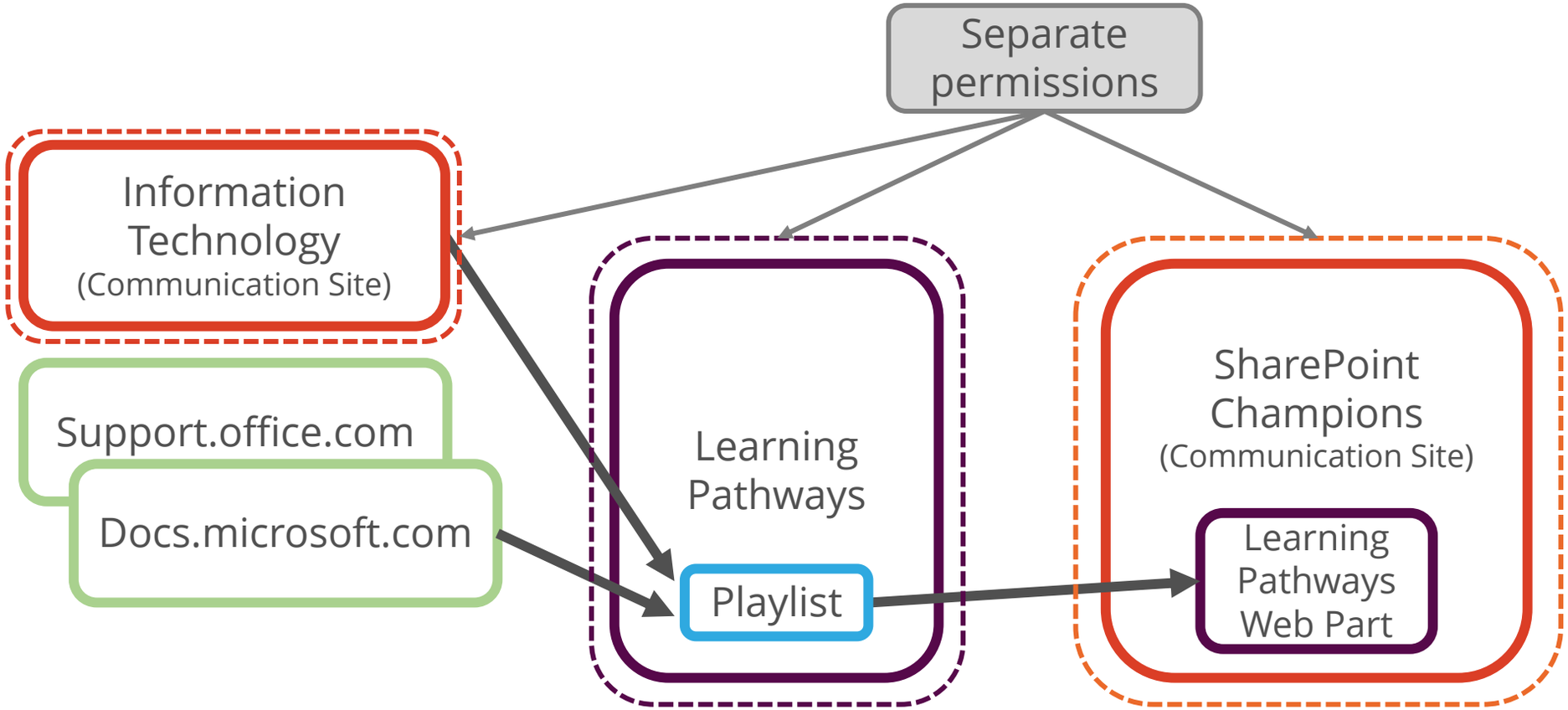
Guidance for how to use the custom built Hogwart's pricing solution to ensure your clients have the most magical experience possible

All

Microsoft 365 Champions Site



Microsoft 365 Champions Architecture



Connections

Culture and communications

Insights

Productivity and wellbeing

Topics

Knowledge and expertise

Learning

Skilling and growth

….but what about Viva Learning?

What is Viva Learning?

- Customizable online learning platform surfaced in Teams

What is *in* Viva Learning?

- Microsoft created content
- Top 125 LinkedIn Learning courses
- Custom content through a SharePoint document library
- External content through Learning Management System integration

But which should I be using at my organization?

It depends

FEATURE COMPARISON

Source: Employee Experience Platform Plans and Pricing

Feature	Learning Pathways	Viva Learning	Viva Learning (Paid)
Included in Microsoft 365 subscription	✓	✓	
Learn.Microsoft.com content		✓	✓
Support.Microsoft.com content	✓	✓	✓
Top 125 LinkedIn Learning courses		✓	✓
Custom learning content in SharePoint documents	Communication & Team Sites	Communication Sites only	Communication Sites only
Custom learning content in SharePoint pages	Communication & Team Sites		Communication Sites only
Supports permissions with SharePoint Groups or Dynamic Groups	✓		
Ability to combine Microsoft and custom learning content into a playlist	✓	✓	✓
Customizable information architecture	✓	✓	
Progress tracking			✓
Integration with Learning Management System			✓
Add learning content to calendar			✓
Surface learning content in Teams	✓	✓	✓
Surface learning content in SharePoint	✓		

Common workarounds for tracking training

- Use the audit log to see who viewed custom content in SharePoint
- Add a Microsoft Form at the end of a playlist to sign off on training or test comprehension

Add a flow in Power Automate to mail merge their information and make a training certificate!

Feature Comparison

Feature	Search bookmarks	Highlighted Content Web Part	Modern PnP Search Web Part	Learning Pathways
Accessible across all SharePoint sites		✓	✓	✓
Customizable information architecture		✓	✓	✓
Customizable scope		✓	✓	✓
Supports audience targeting	✓	✓	✓	
Surface in SharePoint	✓*	✓	✓	✓
Surface in Teams		✓	✓	✓
Ability to combine Microsoft Learn and custom learning content from SharePoint				✓
Search box			✓	
Custom views			✓	
Search filters			✓	

Resources

Content Type Gallery
What's changed in content type publishing
https://tinyurl.com/CTPublishing

Modern PnP Search
Installation and documentation
https://microsoft-search.github.io/pnp-modern-search/

Learning Pathways
Getting Started with Learning Pathways
https://docs.microsoft.com/office365/customlearning/

Microsoft Lookbook
https://lookbook.Microsoft.com

Architectural Overview
https://tinyurl.com/LPArchitecture

Creating Custom Content Packs
https://tinyurl.com/CustomContentPackLP

Continue the conversation

emilymancini.com

linkedin.com/in/eemancini

@eemancini

Continue learning

leftuncharted.org

- Weekly office hour
- Bootcamps
- M365 Miami