

How to Use SharePoint in Microsoft Teams: A Comprehensive Guide

SharePoint is a powerful platform that allows you to create, store, share, and manage documents, sites, and content across your organization. Microsoft Teams is a chat-based collaboration tool that integrates with SharePoint and other Office 365 apps. By using SharePoint in Teams, you can enhance your team's productivity, communication, and collaboration.



In this guide, we will show you how to effectively integrate and utilize SharePoint within Microsoft Teams. You will learn how to:

- Add a SharePoint tab to your team channel
- Create a SharePoint site from your team
- Sync SharePoint files with Teams
- Use SharePoint lists in Teams
- Manage SharePoint permissions in Teams

Add a SharePoint tab to your team channel

One of the easiest ways to access SharePoint content in Teams is to add a SharePoint tab to your team channel. This way, you can view and edit SharePoint pages, libraries, and lists without leaving Teams.

To add a SharePoint tab to your team channel, follow these steps:

1. Go to the channel where you want to add the tab and click the + icon at the top.
2. In the Add a tab dialog box, select SharePoint.
3. You can choose to add an existing SharePoint page or list from your team site, or a different site that you have access to. Alternatively, you can create a new page or list from scratch.
4. After selecting or creating the SharePoint content, click Save.
5. The SharePoint tab will appear in your channel with the name of the page or list. You can rename it by clicking the pencil icon next to it.
6. To view or edit the SharePoint content, click the tab and use the toolbar at the top.

Create a SharePoint site from your team.

Another way to use SharePoint in Teams is to create a SharePoint site from your team. This will automatically create a team site that is connected to your team and has the same name, description, and members. You can use this site to store and manage your team's documents, pages, and content.

To create a SharePoint site from your team, follow these steps:

1. Go to the team where you want to create the site and click the ellipsis (...) next to the team name.
2. In the menu that appears, select View team.
3. In the Team settings page, click the Settings tab.
4. Under Site settings, click Create a site.
5. A new browser tab will open with the SharePoint site creation wizard. You can customize the site name, description, privacy settings, and site classification if needed.
6. Click Next and review the site information. You can also add additional owners and members if needed.
7. Click Finish to create the site.
8. The SharePoint site will be created and linked to your team. You can access it by clicking the Files tab in any channel of your team, or by clicking Open in SharePoint in the ellipsis (...) menu next to the team name.

Sync SharePoint files with Teams

One of the benefits of using SharePoint in Teams is that you can sync your SharePoint files with Teams. This means that you can access and work on your files offline using the OneDrive sync app, and any changes you make will be automatically synced back to Teams and SharePoint when you go online.

To sync SharePoint files with Teams, follow these steps:

1. Go to the channel where you want to sync the files and click the Files tab.
2. In the Files tab, click Sync at the top.
3. A pop-up window will appear asking you to confirm that you want to sync the files with OneDrive. Click Sync now.
4. The OneDrive sync app will launch and start syncing the files to your computer. You can view the sync status and manage your synced folders in the OneDrive app.
5. To access your synced files offline, open File Explorer and navigate to the folder with your team name and channel name under OneDrive - Your Organization Name.
6. To edit your synced files online, open Teams and click the Files tab in the channel where you synced the files.

Use SharePoint lists in Teams

SharePoint lists are collections of data that you can use to track and organize information in various formats, such as tasks, issues, contacts, events, etc. You can use SharePoint lists in Teams to manage your team's data and workflows in a structured way.

To use SharePoint lists in Teams, follow these steps:

1. Go to the channel where you want to use a list and click the + icon at the top.
2. In the Add a tab dialog box, select Lists.
3. You can choose to add an existing list from your team site or another site that you have access to, or create a new list from scratch or from a template.
4. After selecting or creating the list, click Save.
5. The Lists tab will appear in your channel with the name of the list. You can rename it by clicking the pencil icon next to it.
6. To view or edit the list, click the tab and use the toolbar at the top. You can add, edit, delete, sort, filter, group, and format items in the list. You can also create views, forms, rules, and alerts for the list.

Manage SharePoint permissions in Teams

When you use SharePoint in Teams, you need to be aware of the permissions and access levels of your team members and guests. By default, anyone who is a member or owner of your team will have edit access to your SharePoint site, pages, libraries, and lists. Anyone who is a guest of your team will have read-only access to your SharePoint content.

To manage SharePoint permissions in Teams, follow these steps:

1. Go to the team where you want to manage the permissions and click the ellipsis (...) next to the team name.
2. In the menu that appears, select Manage team.
3. In the Manage team page, click the Members tab.
4. You can see the role and access level of each member and guest in your team. You can change their role by clicking the ellipsis (...) next to their name and selecting Make owner or Make member. You can also remove them from your team by selecting Remove from team.
5. To manage the permissions of your SharePoint site, click Open in SharePoint in the ellipsis (...) menu next to the team name.
6. In the SharePoint site, click the Settings icon at the top right and select Site permissions.

7. In the Site permissions page, you can see the groups and users who have access to your site. You can edit, delete, or create new groups and users by clicking the Advanced permissions settings link at the bottom.
8. To manage the permissions of a specific page, library, or list in your site, go to that page, library, or list and click the Settings icon at the top right and select Manage access.
9. In the Manage access panel, you can see who has access to that page, library, or list. You can change their access level by clicking the drop-down menu next to their name and selecting Can view or Can edit. You can also stop sharing or grant access to new users or groups by clicking the corresponding links at the bottom.

Conclusion

Using SharePoint in Teams can help you enhance your team's collaboration, streamline your document management, and leverage SharePoint's features within the Teams environment. By following this guide, you can learn how to integrate and utilize SharePoint within Microsoft Teams effectively.