**Navigation, Search, Intuitive Design, Push Technologies and Findability in SharePoint Online Modern Sites**

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**1. Purpose:** The purpose of this document is to provide information, guidance and recommendations for Navigation, Search, Intuitive Design, Push Technologies and Findability in GEHA SharePoint Online Modern sites.

**2. Navigation:** Navigation is the ability to find the information or function you’re searching for through links provided by Navigation Menus, Link Web Parts, and more. By following Navigation best practices, findability can be greatly enhanced.

A. Navigation Menus: There are three primary Navigation Menu’s, the Global Navigation Menu, the Local Navigation Menu, and the Footer Navigation Menu.

a. A SharePoint Online Modern Communication site provides *horizontal* Local Navigation (“quick Launch”) and horizontal Global Navigation.

b. A SharePoint Online Modern Team site provides a *vertical* Local Navigation (“quick launch”) and a horizontal Global Navigation.

c. For both SharePoint Online Modern Communication and Team sites, the Footer Menu is a static display menu that appears at the bottom of SharePoint Online Home (Landing) pages and provide users with easy access to additional navigation options and links to other sites.

d. For those with sufficient permissions, all navigation menu types are directly editable from the “Home” or “Landing” page.

e. For those “Child Sites” that are associated with a Parent Hub or Child Hub site, since their Global Navigation is inherited from the Parent or Child Hub site, their Global Navigation can only be edited from the Parent Hub’s or Child Hub’s Home page, not the actual Child Site.

f. Child Hubs that are associated with a Parent Hub will *not* inherit their Global Navigation from the Parent Hub, and therefore, for those with sufficient permissions, the Global Navigation of a Child Hub can be directly edited from the Child Hub’s Home page.

g. Cascading Menus are a hierarchical navigation style where sub-level menu items appear when you hover over or click on a parent menu item. Cascading Menus involve fly-outs or dropdowns that dynamically display additional options.

h. Mega Menus allow for multiple levels of hierarchy at once, eliminating the need for Cascading Menu fly-outs or dropdowns.

B. Web Parts: There are a wide variety of Web Parts that provide direct and indirect navigation to content and function.

a. The Hero Web Part allows the user to add pages, images, links, and documents in various layouts.

b. The Events Web Part allows users to easily display upcoming events on their page.

c. The Quick Links Web Part allows users to add links to various types of content, such as documents, videos, pages, and images.

d. The SharePoint Document Library Web Part allows users with proper permissions can edit, view, and add files straight from the Document Library Web Part itself.

e. The List Web Part allows users to display a list from a site on a page and customize it with a custom title, view, and size.

f. The News Web Part allows users to add links to various News Articles.

g. The Sites web part allows users to automatically show sites associated with a Hub Site (when a Hub Site is in use), or the current user's recent sites.

h. The Highlighted Content Web Part allows users to dynamically display content from various sources such as document libraries, pages, news article, videos, images, sites, or site collections.

g. The Group calendar Web Part allows users to put a Microsoft 365 Group Calendar right on a page to make it easily visible to readers.

D. Navigation Strategies:

a. Organize navigation content logically.

b. Label navigational links clearly and succinctly.

c. Observe the “No More than Three Clicks” rule for all navigation end points.

d. Use Global Navigation for cross site navigation within your organization’s content domain.

e. Use Local Navigation for within site navigation.

f. Use Footer Navigation for cross site navigation outside of your organization’s content domain.

g. For Footer Navigation use vertical displayed links organized by content category.

h. Use Web Parts to make the most heavily used content highly visible.

i. Place the most heavily used web part content at the top of the page.

**3. Search:** Search is the ability to find the information you’re looking for through key word queries, AI queries, or through a variety of “Push” technologies.

A. Search Tools:

a. Search Verticals are tabs that allow you to filter results and present results based on some filter/parameter/scope.

b. Result Sources limit searches to certain content or to a subset of search results.

c. Result Types tailor the look of important result types by crafting a display template in HTML and defining a rule that controls when to show it.

d. Query Rules are used to conditionally promote important results, show blocks of additional results, and tune ranking.

e. Not all crawled content or metadata is useful to have in the search index, so the search schema has a list of useful types of content and metadata, called managed properties. The Search Index only includes content and metadata from the managed properties.

f. Query Suggestions are words that appear below the search box as a user types a query. SharePoint automatically creates a Query Suggestion when you've clicked a search result for a query at least six times. As an admin you can manually create your own lists of queries that always shall be suggested or phrases that will never be suggested and import them to SharePoint.

g. Modern Search Usage reports with Microsoft Search provide a few graphs and tables generated from searches that are executed from search in modern sites.

1. Query Volume: This report shows the number of search queries performed. Use this report to identify search query volume trends and to determine periods of high and low search activity.

2. Top Queries: This report shows the most popular search queries. A query is added to this report when it's searched at least three times with a click on a result. Use this report to understand what types of information your users are searching for.

3. Abandoned Queries: This report shows popular search queries that receive low click-through. Use this report to identify search queries that might create user dissatisfaction and to improve the finding of content.

4. No Results Queries: This report shows popular search queries that returned no results. Use this report to identify search queries that might create user dissatisfaction and to improve the finding of content.

5. Impression Distribution: This report shows impressions over various time frames. The timeline shows the daily number of impressions for a result type. Determine which result type is most frequently, or infrequently, used.

h. The Page Diagnostics for SharePoint tool is a browser extension for the new Microsoft Edge (https://www.microsoft.com/edge) and Chrome browsers that analyzes both SharePoint Online modern portal and classic publishing site pages. The tool provides a report for each analyzed page showing how the page performs against a defined set of performance criteria.

i. Search and Intelligence Admin Center:

1. A Bookmark is a promoted search result based on specific keywords.

2. A Q&A is like a Bookmark except it is in a Q&A-type format.

3. The Acronym feature provides a way to set up a global list of Acronyms such that when someone searches for the acronym in SharePoint, it will come back with an explanation of the abbreviation.

4. A search vertical refers to a specific category or type of search results displayed on the search result page. These verticals help users find relevant information more efficiently.

B. How Search is Different in SPO:

a. Verticals Rather than Search Results Refiners:

1. SharePoint On-Premises search results pages employ Search Refiner Web Parts. These web parts allow the user to apply custom search refiners (filters) after the initial search results are returned. These web parts can be configured on the search results page. In general, the refiners offer a wide variety of choices and are dynamic.

2. SharePoint Online search results pages employ Search Verticals. These verticals allow the user to apply custom search refiners (filters) after the initial search results are returned. These verticals can only be configured from the search settings page. In general, verticals offer a limited variety of choices and are not dynamic.

b. Search from Current Site Down Rather than Search Across Sites:

1. SharePoint On-Premises search results, regardless of which site or sub-site the search was run from, provide results across all sites in the site collection. So, for example, a search run from a sub-site will return results from its own site, sub-sites, sister sites, parent site, etc.

2. SharePoint Online search results only provide results from that site down. So, for example, a search run from a sub-site will only return results from its own site and sub-sites, not from its sister sites, parent site, etc. However, the search results page does provide bread crumb navigation which the user can use to easily navigate to the sites above the current site.

c. The Modern Search Box is personalized so that the suggestions\* and results you see may be different from what other people see, even when you search for the same words. (\*You'll see results before you start typing in the search box, and the results update as you type).

d. SharePoint Start Page – see item 3Ag above.

C. Optimizing Search:

a. By using Managed Metadata, you can ensure that your content is consistently labeled, which can improve the accuracy of search results.

b. The Page Titles and Descriptions are used by the search engine to index the content of the page. By optimizing these elements with relevant keywords, you can improve the visibility of your pages in search results.

c. User Friendly URLs are human-readable web addresses that are easy to remember and type. By using friendly URLs, you can make it easier for users to find your content and improve the visibility of your site in search results.

d. PDF files are a common format for documents, but they are not always searchable by default. By enabling the searchability of PDF files, you can ensure that their content is included in search results.

e. Search Verticals are used to filter search results based on specific criteria such as file type, author, or date. By customizing search verticals, you can make it easier for users to find the information they need.

**4. Intuitive Design:** An Intuitive Design is a design that is easy to use and understand without conscious effort or feels “instinctive”. When an interface is intuitive it greatly increases the findability of information and function.

A. Intuitive Design Principles:

a. What is familiar is intuitive, that is, if users are familiar with the interface layout and design, then that interface and design will feel intuitive to them.

b. The most important content is top left, and center. Since English is a language that prints and read from the top and left first, all Englis speakers have been trained to read from the top first, and the left first. Therefor whatever is your most important information or function should always appear on the top left of your page.

c. Staying on the same page is better than hyperlinking to another page. If the information or function is critical and\or commonly used, then it’s better to put it on the same page the users is accessing the other data from.

d. Less clicks is better than more clicks. If a user must click on a function or information to get to what they want, then it’s better that that click leads them directly to the information they need instead of leading them to more clicks.

e. The Footer is an information “Junk Drawer”, all the information there should be useful, but not critical or commonly needed.

f. Always involve the users! Never try to design an intuitive interface in a vacuum or with just input from developers, but instead always go to the people who will be using the solution and ask them to review the design for intuitiveness.

g. Be ready to change things as people live with it. No intuitive design can be considered completed until the users live with the product for a while. Inevitably some changes will be required, but if you involved the users all along, those changes should be minor.

B. Intuitive Design Methods:

a. Spend more time in the design phase. Designing an intuitive interface requires that you spend more time determining from research and user interviews what kind of design would be intuitive.

b. Paper prototypes are a must. Generally, it’s much easier to design on paper than to design in software. It also tends to be true that the more time invested in a prototype the more unwilling designers and users tend to resist changing it. For this reason, the use of paper prototypes tends to greatly enhance intuitive design efforts.

c. Use an agile, iterative process. Waterfall processes (all design up front) are rarely successful in designing an intuitive design, but agile processes are usually highly success when designing intuitive interfaces.

d. Follow the best practices for Intuitive Design, Navigation, Search, Push Technologies, and Findability mentioned in this document.

**5. Push Technologies:** With the introduction of SharePoint Online Modern, Microsoft began to significantly increase the availability of OOTB Push Technologies in SharePoint.

A. Pull Technologies are technologies that require the user to “Pull” or in other words, take some action to find the information they need. Common examples of Pull Technologies include Navigation, Search and View Filtering.

B. Push Technologies are technologies that delivers the information the user wants to them without requiring them to take any action to find it. Common examples of Push Technologies include SharePoint Start Page, Roll-up Web Parts, Event Web Parts, and the Highlighted Content Web Part.

C. While traditionally efforts to increase Findability almost entirely focused on Pull Technologies, with the introduction of Push Technologies in SharePoint Online Modern, it becomes very important to begin to refocus those priorities to Push Technologies.

D. SharePoint Modern Push Technologies:

a. The News Web Part allows you to roll up SharePoint News and Announcements from many sites into one site.

b. The Events Web Part allows you to roll up SharePoint Calendars and Events from many sites into one site.

c. The Highlighted Content Web Part allows you to roll up SharePoint Documents from many sites into one site.

d. SharePoint Start Page:

1. The SharePoint start page is an AI generated place to find:

* The sites you follow.
* The sites you visited recently.
* The sites you visit frequently.
* The suggested sites you might want to be aware of.
* Roll-up of News from across the organization.
* A search box that searches all the SharePoint sites or One Drive locations that you have access to or own.

2. The right pane gives you easy access to relevant content arranged in the following groupings:

* “News from Sites” – Highlights updates from sites you follow or visit often.
* “Frequent Sites” – Will show sites you visited often and your recent activity on them.
* “Suggested Sites” – Recommends based on searches you've done and our recommendations.

3. The left navigation pane shows SharePoint sites you follow, those you've visited recently, and sites your company wants to spotlight.

* “Following” – Displays sites you follow, like your team's site or a site from another group you work with.
* “Recent” – Shows any site you've gone to recently.
* “Saved for Later” – Lists news articles you've saved to read later.
* “Featured Links” – Displays sites your company wants to showcase.

**6. Findability Checklist:** Findability is the ability to find the information you’re looking for through Navigation, Search, Intuitive Design, and Push technologies.

A. Permissions: Ensure permissions are correct, if users have been excluded from data access by incorrect permissions settings, then regardless of all other measures taken, they will not find the information they need.

B. Navigation:

a. Organize navigation content logically.

b. Label navigational links clearly and succinctly.

c. Observe the “No More than Three Clicks” rule for all navigation end points.

d. Use Global Navigation for cross site navigation within your organization’s content domain.

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g. For Footer Navigation, use vertical displayed links organized by content category.

h. Use Web Parts to make the most heavily used content highly visible.

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C. Search:

a. Properly use Content Types and Metadata. Properly structured and defined content types and metadata will improve the effectiveness of Searches, Views, Roll-up Web Parts, and other Findability tools.

b. Use Managed Properties. Creating new Managed Properties from Crawled Properties ensures that critical metadata will be added to the Search Index and therefore be more Findable.

c. Use Managed Metadata. By using Managed Metadata, you can ensure that your content is consistently labeled, which can improve the accuracy of search results.

d. Create Document\List Metadata Indexes. Creating indexes from list\library metadata will increase the Findability of that metadata in views and searches.

e. Use Optimized Page Titles and Descriptions. The page titles and descriptions are used by the search engine to index the content of the page. By optimizing these elements with relevant keywords, you can improve the visibility of your pages in search results.

f. Use User Friendly URLs. User Friendly URLs are human-readable web addresses that are easy to remember and type. By using friendly URLs, you can make it easier for users to find your content and improve the visibility of your site in search results.

g. Enable Searchable PDFs. PDF files are a common format for documents, but they are not always searchable by default. By enabling the searchability of PDF files, you can ensure that their content is included in search results.

h. Define Verticals based on your user’s needs. While the Out of the Box verticals are very useful, most organizations would increase Findability by adding their custom verticals based on their own unique content.

i. Use the Search Acronym Feature. All organizations have unique Acronyms that are commonly used, but not knowing those Acronyms, or the proper meaning of those Acronyms can reduce Findability. By employing Defined Search Acronyms this issue can easily be overcome and Findability of Acronym related data highly improved.

j. Use the Search Bookmark Feature. A Bookmark is a promoted search result based on specific keywords.

k. Use the Search Q&A Feature. A Q&A is like a Bookmark except it is in a Q&A-type format.

D. Intuitive Design:

a. Spend more time in the design phase. Designing an intuitive interface requires that you spend more time determining from research and user interviews what kind of design would be intuitive.

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c. Use an agile, iterative process. Waterfall processes (all design up front) are rarely successful in designing an intuitive design, but agile processes are usually highly successful when designing intuitive interfaces.

E. Push Technologies:

a. The News Web Part allows you to roll up SharePoint News and Announcements from many sites into one site.

b. The Events Web Part allows you to roll up SharePoint Calendars and Events from many sites into one site.

c. The Highlighted Content Web Part (HCWP) allows you to roll up SharePoint Documents from many sites into one site.

d. The SharePoint Start Page is a place to find sites, read news, or look up content.

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D. Push Technologies:

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