SharePoint & Microsoft 365 Integration Success Checklist

Phase 1: Planning & Strategy

- Define Goals: Clearly identify what you want to achieve with the integration (e.g., improve project collaboration, automate reporting, centralize files).
- Identify Key Use Cases: Pinpoint the top 3-5 workflows that will benefit most from integration (e.g., project document management in Teams, sales data dashboards in Power BI).
- Map Permissions: Outline your required permissions structure. Who needs access to what? Align with existing team or project roles.
- Communicate to Stakeholders: Inform team leads and end-users about the upcoming changes and benefits.

Phase 2: SharePoint & Teams Integration

- Identify Target Team/Channel: Choose the appropriate Microsoft Team and Channel for embedding SharePoint content.
- Add Document Library Tab: Go to the channel, click '+', select 'SharePoint', and add the relevant document library. Use a clear, descriptive name for the tab.
- Add SharePoint List/Page Tab: For other content like task lists or news, add them as separate tabs for easy access.
- Verify Permissions: Double-check that all team members can access the embedded content. Remember to manage permissions via Teams, not directly in SharePoint.
- Train Users: Briefly show the team how to access and use the new SharePoint tabs within Teams.

Phase 3: Power BI & Data Automation

- Prepare SharePoint List: Ensure your SharePoint list is clean, well-structured, and ready to be used as a data source.
- Connect Power BI: In Power BI Desktop, use 'Get Data' > 'SharePoint Online List' to connect to your site.

- Build Report: Create the necessary visuals and dashboards to represent your data.
- Publish to Power BI Service: Publish your report to a workspace.
- Configure Scheduled Refresh: In the Power BI service, go to dataset settings and schedule a daily or hourly refresh to keep data current.
- Embed in Teams (Optional): Add the published Power BI report as a new tab in your team channel for easy viewing.

Phase 4: Outlook Alerts & Workflows

- Identify Critical Changes: Determine which actions require immediate notification (e.g., new document uploaded, task status changed to 'Completed').
- Set Up SharePoint Alerts: Navigate to the list or library, click the ellipsis (...) and select 'Alert me'.
- Configure Alert Settings: Specify the alert title, recipients (users or groups), change type, and frequency (immediate or summary).
- Test the Alert: Perform the trigger action (e.g., modify an item) to confirm the email notification is working correctly.

Phase 5: Security & Governance

- Review External Sharing Settings: Check the SharePoint admin center to ensure external sharing policies align with your company's security requirements.
- Apply Principle of Least Privilege: Confirm that users only have the access they absolutely need.
- Configure DLP Policy (If needed): If handling sensitive data, set up a basic Data Loss Prevention (DLP) policy in Microsoft Purview to monitor or block inappropriate sharing.
- Schedule Regular Permission Reviews: Set a calendar reminder to review access permissions quarterly or bi-annually.