UMB Sharepoint Online Guidelines

DEVELOPED BY CENTER FOR INFORMATION TECHNOLOGY SERVICES

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What is Sharepoint?

Sharepoint Online is a cloud based collaborative service. It enables departments, schools, and project members to share and collaborate with other faculty/staff, students, and researchers. With SharePoint Online, you can create collaborative websites that can be used to share files, assign tasks, start blogs, calendars, manage workflows, etc. from anywhere—at the office, at home, or from a mobile device.

What are the benefits of using Sharepoint?

There are many great benefits to using Sharepoint to help improve communications, collaboration, reduce paperwork and manual processes, and safely store and share information within your department, school, and project. Organizations can easily control cost and reduce risk associated with IT through SharePoint; not to mention it allows departments and project teams to effectively access information and collaborate with each other. Some of main benefits include:

- Accessible anywhere: Sharepoint online is a cloud based service so it is easily accessible to all UMB users both on and off campus by using a browser and logging into O365 or from your mobile device by using an app.
- Microsoft programs: It is closely integrated with many other Microsoft programs that you use and are familiar with such as Word, Excel, Powerpoint, and Outlook as well as many new programs that will help create and automate business processes and tasks you do regularly.
- Collaboration: It is a great tool to improve collaboration by sharing documents, creating and assigning tasks, using lists to track requests/information, sharing calendars and timelines, discussing topics, using a discussion board or newsfeeds, creating alerts and notifications, and much more.
- Security: Content within Sharepoint is securely stored using a Microsoft managed cloud environment. Security and permissions can be set at a site, folder, document, and item level.
- Ease of Use: Sharepoint includes functionality that gives you more power to use business tools and develop solutions to improve your job without requiring a technical background or a developer.
- Search: Anyone that has access to your site content can easily search for information using the built-in Search feature. An Advanced Search feature is also available.

Sharepoint Overview

Sharepoint Collection

SharePoint Online site collection is a top-level (or root) site that contains subsites. The subsites share administration settings, navigation, and permissions (each of which can be changed for individual subsites as needed). Each site collection has its unique site columns (metadata), navigation, permissions (security groups), site templates, branding, etc. Subsites, on another hand, inherit all these properties from the top-level site in a site collection.

When should a site be a Site Collection?

1. You are a <u>large organization with multiple business units and each business unit has independent and separate business functions</u>.
2. You are a <u>large organization</u> and each of your departments has a <u>large number of people</u> and each department is expected to create lots and lots of sites that do not to rely on global metadata or security groups.
3. You are a large organization and <u>want to separate your SharePoint administrative functions</u> (have separate SharePoint administrators for each site collection)
4. Your organization has <u>lots of content</u> (hundreds of GB). You can allocate both server resources and storage per site collection. So if you say have a number of sites that are running server-intensive workflows or you have lots of content, you can allocate separate site collections and assign those accordingly.

Sharepoint Sites

A SharePoint site is a website that contains different SharePoint web parts like a Document Library, Calendar, Task List, etc. SharePoint sites can have one or more pages to display content to the user.

When to create a site in Sharepoint?

1. You are looking to create a site that needs to rely on <u>same metadata, security or navigation as the existing sites you already have</u>.
2. You are a small organization or a department/group within a larger organization that serves a common role. Unless you have a Sharepoint site owner/administrator that will maintain the security and properties, just stay with an existing site collection.
3. You created a template site (i.e. Project site template or department site template) and want your new site to resemble same look and feel as the rest of the sites. Site templates can only be replicated across same site collection
4. You only plan to have a handful of SharePoint sites. If you plan to roll out hundreds and hundreds of sites, you might want to consider creating a new site collection.

Document Libraries

A document library provides a secure place to store files where you and your co-workers can find them easily, work on them together, and access them from any device at any time. For example, you can use a document library on a site in SharePoint Online to store all files related to a specific project or a specific client. Adding files or moving files between folders is as easy as dragging and dropping them from one location to another.

The default site in SharePoint Online includes a document library and one is created automatically when you create a new site. You can add additional document libraries to a site as needed. This is useful, for example, if you need to restrict access to a set of files. Each document library displays a list of files, folders, and key information about each, such as who created or last modified a file. You can use this information to organize your files and make it easier to find them.

In a document library, you can:

- Add, edit, delete, co-author, and download documents.
- Control who has access to a library, a folder with in a library, or an individual file within a library.
- Track the activity on a file, such as when it was last modified, and receive a notification when something has changed.
- Create a custom view of a document library
- Share files or folders with others.
- Add a link in a document library to something that is stored outside the library, for example, a link to a file located in a different library or even a link to an external web page.
- Highlight a link, file or folder in a document library so you and others can get to them quickly.

Discussion Board

Discussion Boards are not a standard component/feature that appears in the left navigation when a new Sharepoint site is created. To add a discussion board to your site, select *Site Contents* in the left navigation area, then pick *+ New* in the top horizontal navigation bar, pick *App* from the list of drop-down options, and select the app titled *Discussion Board*. You will need to give your new board a title and then it will appear within the left navigation of your site under recent. If you would like to move the Discussion Board within the left navigation so it appears as a main component of the site, select the *Edit Links* option at the bottom of the left navigation panel and then drag the Discussion Board up/down to the location you want it to appear and press Save.

Lists

A list is a collection of data that you can share with team members and other site users. SharePoint provides a number of ready-to-use lists and list templates to provide a good starting point for organizing list items. For more information go to: https://support.office.com/en-us/article/Introduction-to-lists-0a1c3ace-def0-44af-b225-cfa8d92c52d7

Pages

Using pages is a great way to share ideas using images, Excel, Word and PowerPoint documents, video, and more. You can create and publish pages quickly and easily, and they look great on any device. To learn how to add a page to a site, refer to: https://support.office.com/en-US/article/Add-a-page-to-a-site-b3d46deb-27a6-4b1e-87b8-df851e503dec

Newsfeeds

The Newsfeed page provides quick access to the lists of people, documents, sites, and tags you're following. It is similar to other popular social networking sites that allow you to engage in conversations in your newsfeed. The most common actions you can perform within the Newsfeed are:

- Post information and ideas to the company newsfeed or site newsfeed

- @mention colleagues and include #hashtags
- "Like" posts, include pictures, videos, links to documents, and web URLs

Maintaining Content

Each administrative department and school is responsible for assigning individuals to review and maintain the pages, documents, and information within their Site Collection. We recommend that a group of individuals that represent each of the areas within an administrative department or school routinely meet to review/discuss their content within Sharepoint on a weekly/monthly basis to minimize ROT:
- Redundant (unnecessary and often duplicate)
- Obsolete (no longer useful or out-of-date)
- Trivial (unimportant and adds no additional value)

Why is it important to minimize ROT? ROT makes it hard to find the really important documents in your organization. ROT makes it easy to misplace sensitive data, that you don't want found. ROT places unnecessary risks in your organization that will result in loss of productivity, reputation and increased exposure to litigation. It also slows down search engines and their indexes, thus making it take longer to find information.

Using alerts and following site content can also help to ensure that content is updated and maintained regularly.

Getting Started

How to Access Sharepoint

There are three ways to access Sharepoint:

1. Through the Office 365 portal at https://portal.office.com – after entering your email and password, from the main portal page, click on the *Sharepoint* icon.
2. Directly via https://umbcits.sharepoint.com – after entering your email and password, you'll be directed to the main UMB Sharepoint site.
3. Using your mobile device, by using the Sharepoint app. Simply go to the *App Store* and download the *Sharepoint* app. Once it is installed on your mobile device, open the app and enter your email and password.

File Naming Standards

The following file naming standards should be followed for document libraries:

- Do not use special characters
- Separate words in file names with underscores or dashes
- Check the properties of office documents before uploading for accuracy
- Avoid using dates in file names
- Do not use version numbers in file names

For more detailed explanation regarding file naming standards, refer to the Sharepoint website.

Following

Following a document enables you to track updates and bookmark a document that you think is important, use frequently, or want to access quickly. For instructions, see: https://support.office.com/en-us/article/Follow-documents-to-track-them-e022c55c-4bf0-4809-8b3a-1da870cf17d7

Alerts

SharePoint alerts are email notifications that are sent by SharePoint when something changes in a document library, Sharepoint calendar, or list (ie. Issues log, task list, announcements, contact list, office supply request list). Alerts can be setup for:

- Whole lists or library
- Individual item (folder, document, or item such as a task or event)
- Sharepoint Search

Alerts come in e-mail or as text messages to your mobile phone, at the interval you specify, to let you know when specific items change. For instructions on how to setup an alert, refer to: https://support.office.com/en-us/article/Manage-view-or-delete-SharePoint-alerts-99dfb19c-9a90-4a8c-aba1-aa8c8afb0de2#ID0EAADAAA=Online

Pin To Top

You can highlight important files, folders, or links in a document library in SharePoint Online by pinning them to the top of the document library. When you pin an item, a thumbnail image will appear at the top of the document library page making it easier for users to find it. You then simply click the image to open the item in the browser window. For additional instructions: https://support.office.com/en-us/article/Highlight-a-file-folder-or-link-in-a-document-library-9c5f46de-f0f4-4cf1-bd5e-b4ebc7a8b31c

Sharing Content

Sharing content within your site with others is a great way to increase collaboration and grant permission to other people to access the Sharepoint site. When you share content, you will have the ability to choose the permission level (depending on your permission level – you can only assign permission that is equal or less than your own) that the individual you are sharing with will have. For more information, see: https://support.office.com/en-us/article/Share-a-site-958771a8-d041-4eb8-b51c-afea2eae3658

Request Permission

When using Sharepoint online and viewing content in other sites, you may receive an error message that says "sorry, this site hasn't been shared with you" or "Error: Access Denied". This means that you have not been setup with permission to access the content within that site. If you want to request access to the site, follow these steps:

1. On the affected SharePoint Online site collection, click the gear icon for the *Settings* menu, and then click *Site Settings*.
2. On the *Site Settings* page, under *Users and Permissions*, select *Site permissions*.
3. Select *Access Request Settings*.
4. Click to select the *Allow Access Requests* check box.
5. In the *Send all requests for access to the following email address*, type your email address, and then click *OK*.

If you want to request access to a Sharepoint site and aren't sure how to navigate to the site within Sharepoint or want to have a new site created for your project, department, or group – use the *Sharepoint Request form* found on the Sharepoint website.

Online Training

The CITS Enterprise Training Group has developed an informative website about Office 365, including Sharepoint. The Sharepoint website contains information about online training, FAQ, the Sharepoint User Group, etc. Workshops and training opportunities are also offered periodically.

Help

Each of the schools at UMB also have their own help desk and IT resources that can assist individuals at their respective school with using Sharepoint Online. Administrative departments throughout UMB should contact the CITS IT Help Desk for assistance with using Sharepoint Online. The CITS IT Help desk is also the primary resource for providing assistance with O365 applications for all the administrative departments at UMB. You can reach the IT Help desk via email or by calling 410-706-HELP.

Learn More

In addition to the Online Training and Sharepoint User Group, we encourage all Sharepoint users to regularly reference and participate in discussions that will be available in the *Sharepoint Community* site. This site will be available to all Sharepoint users and will contain information about latest news and features, announcements about upcoming Sharepoint related training and meetings, serve as a place where Sharepoint users can ask questions, share ideas, and learn how other people are using Sharepoint to help their department, school or project.

Site Owner Information

Who are Site Owners?

Site Owners are designated individuals within each administrative department and/or school to maintain security, groups, and sites for their respective area. It is usually recommended that two or three people are designated as Site Owners for each Site Collection. In order to become a Site Owner, an individual must have completed "Sharepoint Owner" training/workshops, have prior experience as a Sharepoint Site Owner, or display a thorough understanding of Sharepoint permissions and concepts.

Staying Informed

In order to assist Site Owners with the administration and maintenance of Sharepoint sites, we encourage Site Owners to consider joining the Sharepoint User Group and take advantage of workshops/training opportunities on campus. In addition, within the *Sharepoint Community* site there is a *Site Owner* subsite restricted to only Sharepoint Site Owners and Administrators. We encourage all Sharepoint Site Owners to regularly reference and participate in discussions that will be available in both the *Sharepoint Community* and *Site Owner* sites. The *Site Owner* site will contain information about latest news and features, announcements about upcoming site owner related training and meetings, serve as a place where site owners can ask questions, share ideas, and learn how other site owner/administrators are setting up sites, controlling access, and addressing end-user questions for their department, school or project Sharepoint site.

If you have any questions or concerns about your Site Owner responsibilities or need help with an administrative task, please contact the CITS Web Development group for assistance.

Permission Inheritance

The root of all permissions in Sharepoint is the Site collection. Permissions automatically flow downhill from the site collection (parent site). Permissions should be inherited from the parent site whenever possible; do not break inheritance unless absolutely necessary as it creates administrative and security overhead/management problems and it also negatively impacts the performance of the site. It is also recommended to use Active Directory (AD) groups that will automatically update with the members that are added/removed to your organization/departments and assign the AD groups to the three different Sharepoint groups accordingly.

Creating a Sharepoint Site

In order to improve performance and search results, it is recommended that Sharepoint Sites are developed to be wide rather than deep. Keeping a site 3-4 levels deep will reduce the amount of clicks and navigation users will need to do in order to find information. Before creating a new Sharepoint site, create a plan/hierarchy of how to layout the site. Determine the best titles for the sites and what groups should have access to each. Then assign the permissions for each subsite using groups rather than using individual user permission, for more information see Sharepoint Groups & Permissions.

Sharepoint Groups & Permissions

A SharePoint group is a collection of users who all have the same set of permissions, or permission level. SharePoint groups can simplify the task of assigning and managing site access. Rather than track site or content access one person at a time, you can use groups to conveniently assign the same permission level to many people at once.

Assigning permission levels to SharePoint groups instead of individuals lets you:

- Streamline site maintenance for yourself and successive site owners.
- Ensure that people performing similar tasks have the same level of access.
- Ensure that people have only the access they need, not more.

By default, the following Sharepoint groups should be used and assigned the permissions below:

Group Name	Permission Level	Description
Owner	Full Control	Full permissions to the Site and all subsites
Member	Contribute	View, add, update, and delete list items and documents.
Visitor	Read	View pages and items in existing lists and document libraries and download documents.

Assigning groups to the Site Collection and subsites:

- At the site collection level, the Sharepoint Visitor group should contain the highest level AD group for your organization so that everyone within your organization can view (read only) content under all sites within it.
- Only assign an AD group to a Sharepoint Member group for subsites that they should be able to contribute (add/update/delete). Remember all subsites should inherit permissions from the parent site, so anyone in the Member group can modify content in all subsites – unless they you break inheritance and/or assign a different AD group to the Sharepoint member group for a subsite.
- Only add qualified individuals to the Sharepoint Owner group since these individuals have full control to the site and can modify permissions, add/edit/delete all content, etc.

For additional information, please refer to: https://support.office.com/en-us/article/Understanding-SharePoint-groups-94d9b261-161e-4ace-829e-eca1c8cd2eb8

Managing Permissions

Site Owners should manage user requests using the built-in access request feature offered within Sharepoint. The access request feature allows people to request access to content that they do not currently have permission to see. As a site owner, you can configure the feature to send you mail when someone requests access to a site. You can then choose whether to approve or decline their request. If you approve the request, you can also specify the specific level of permission you'd like to assign to a user. For instructions on how to setup and manage access requests, refer to: https://support.office.com/en-us/article/set-up-and-manage-access-requests-94b26e0b-2822-49d4-929a-8455698654b3

Sharepoint Views

The standard Sharepoint view that all Sharepoint Online sites should use at UMB is the 'New Experience' (also called "modern") view. The new experience view is faster, has additional phone and tablet features, and simpler navigation.

Important Note: As long as the "Member" group has been assigned the "Contribute" permission level, then they will not be able to change the view for specific libraries or content they have access. If a "Member" group has been assigned "Edit" permission level (this is the default permission assigned to the "Member" group), then they can modify views.

Metadata

In order to improve the search functionality within Sharepoint and make it easier for users to find information, metadata should be used. Metadata is an underlying definition or description that helps to identify/explain the information, such as the title, author, subject matter, file size/date/type. To learn more about metadata and how to use it correctly, refer to: https://support.office.com/en-us/article/Introduction-to-managed-metadata-a180fa28-6405-4679-9ec3-81d2028c4efc

To setup metadata navigation and filtering, following these directions: https://support.office.com/en-us/article/Set-up-metadata-navigation-for-a-list-or-library-c222a75d-8b18-44e2-9ed8-7ee4e0d23cfc?ui=en-US&rs=en-US&ad=US

Advanced Features

PowerApps, Flow, and PowerBI

If someone wants to use PowerApps, Flow and/or PowerBI to develop custom applications, flows, and/or reporting/analysis, they should contact the CITS IT Help Desk for additional information regarding licensing and usage. Only users that have access to these advanced applications within O365 will be able to develop, share, and use the applications, flows, and reports that are developed with them.