

SharePoint Online

Advanced Features Manual

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UHN Digital

Last Updated: January 2018

Introduction

The Advanced Features Guide is for the individuals identified as Site Owners of a SharePoint team site and looking for further instructions on management of their site.

Before reviewing this manual, please ensure you have also read the Site Owners Getting Started Guide

REMEMBER: Every SharePoint online site should have **two** Site Owners.

Permission Management Overview

SharePoint team sites make it easy for staff to work together. As a Site Owner you grant access to users and determine the appropriate permission levels needed.

Permission Levels

Generally only three permissions groups will be needed for your site:

1. Full Control = Site Owners (This is you!)
2. Contribute = Team Members
3. Read = Visitors

Planning site permissions:

- Access permissions are grouped into Contributors, Visitors and Owners
- It is best practice to provide team members with the lowest permission levels they need to perform their assigned tasks.
- Give people access by adding them to standard, default SharePoint groups (Contributors, Visitors, and Owners).
- Use permission inheritance to create a clean, easy-to-visualize hierarchy. That is, avoid granting permissions to individuals, instead work with SharePoint groups. Where possible, have sub-sites simply inherit permissions from your team site, rather than having unique permissions.
- Organize your content to take advantage of permissions inheritance: Consider segmenting your content by security level – create a site or a library specifically for sensitive documents, rather than having them scattered in a larger library and protected by unique permissions.

Note: VPN is not required to access SharePoint Online content from off-site. Team members will need to have their Multi-Factor Authentication set up and log in using their UHN account credentials

Overview of all permission settings in SharePoint Online:

Permission	Full Control	Design	Edit	Contribute	Read	Limited Access	View Only
View	✓	✓	✓	✓	✓	✓**	✓
Download	✓	✓	✓	✓	✓	✓**	
Add	✓	✓	✓	✓*			
Update	✓	✓	✓	✓			
Delete	✓	✓	✓	✓*			
Approve	✓	✓					
Customize	✓	✓					
Add Users	✓						

* Contributors can add/delete lists items or documents, but cannot add/delete the whole lists or document libraries.

** Limited Access users can view specific lists, list items, folders, document libraries or documents.

Permissions management

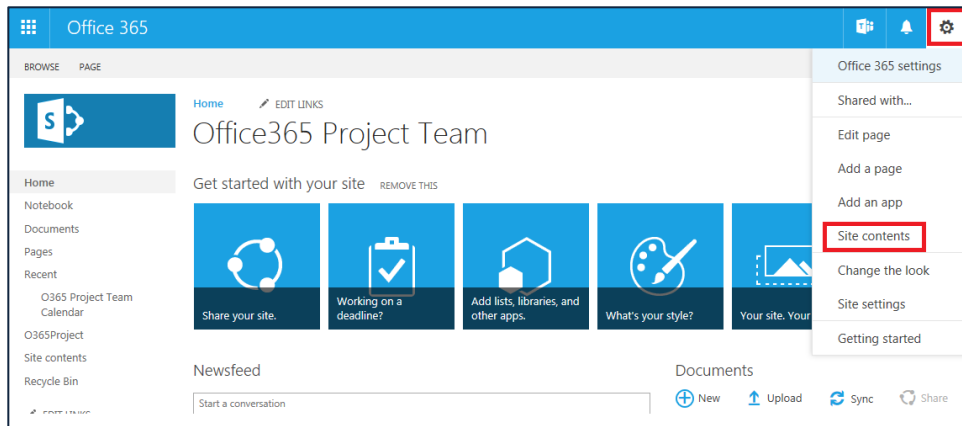
The integrity, confidentiality, and privacy of UHN’s mission-critical information rest on how secure you make your site — specifically, to whom you choose to grant access to your site. Granting and restricting access to your site is called managing permissions, and it’s one of your most important responsibilities as a site owner.

Site Permissions – Step-by-Step Instructions

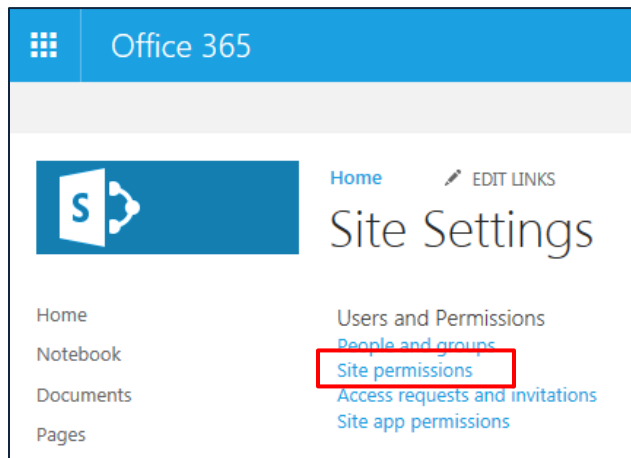
Setting Site Permissions

As a Site Owner you have access to set site permissions.

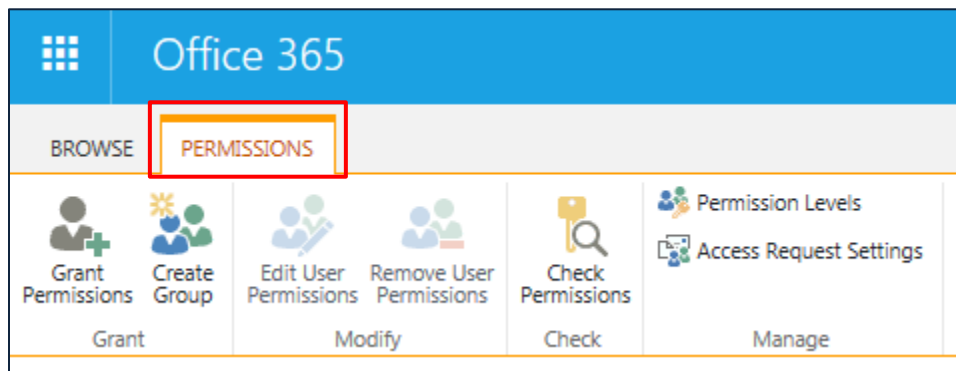
1. Click on **Site Settings** from the **Settings** dropdown.



2. Select **Site Permissions** under the *Users and Permissions* heading.

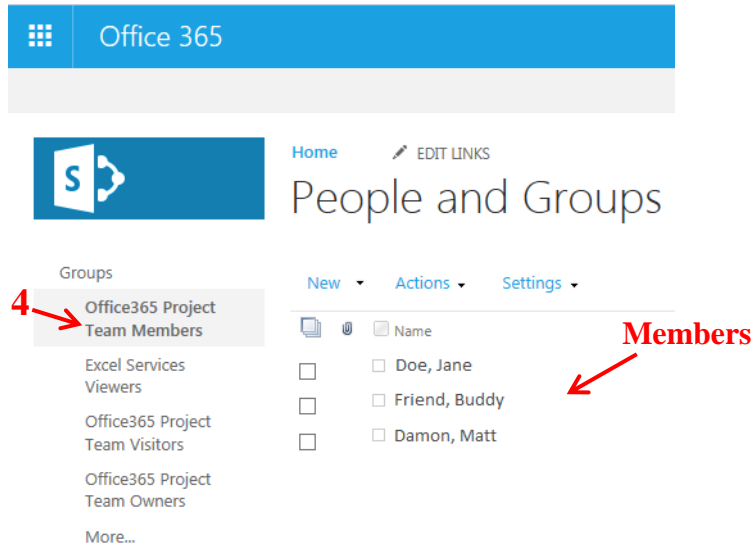
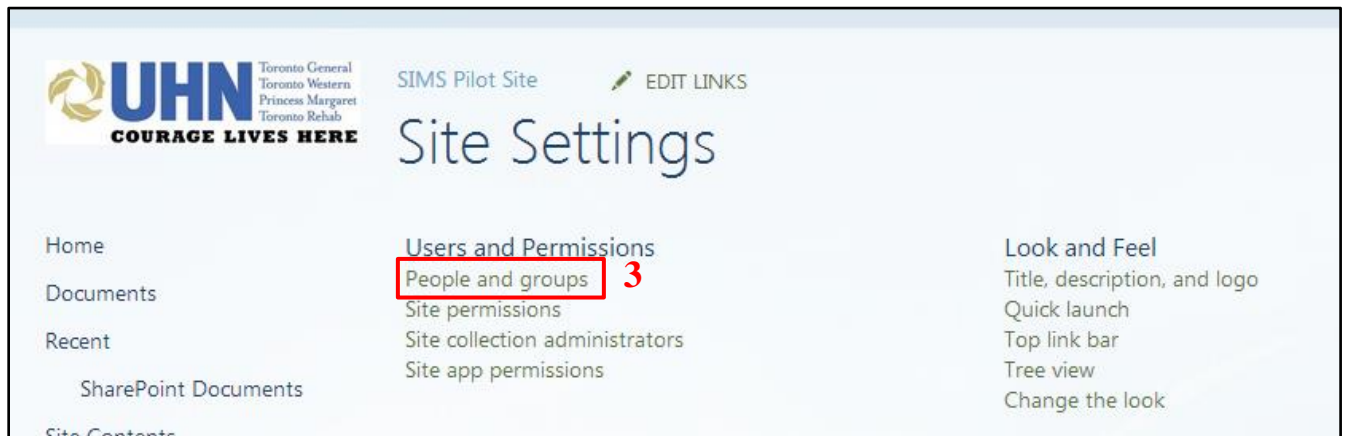


3. The **Permission ribbon**, visible at the top of your page, will display with options to Grant, Modify, Check and Manage.



Viewing Members of a SharePoint Group

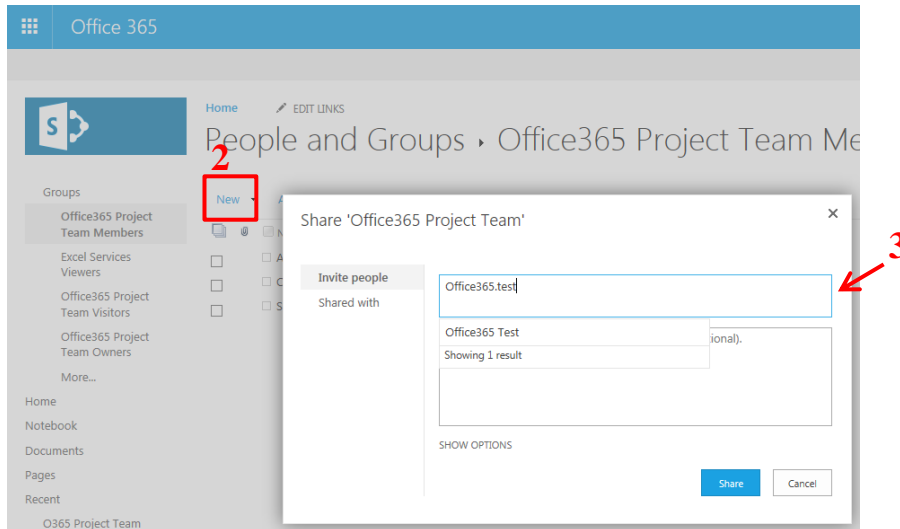
- 1 To view members of a group, click on the Settings icon.
- 2 Select **Site settings**
- 3 Under “Users and Permissions” section, select **People and Groups**
- 4 Click on the group name from the left hand side menu to display all members of that particular group



Adding a User to a Site/Group

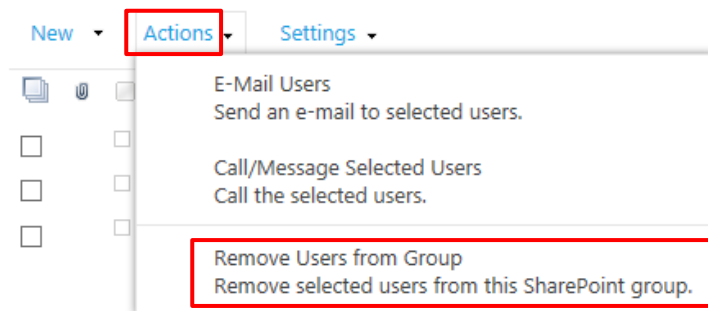
- 1 Select the appropriate group (Follow steps 1-4 above)
- 2 Add new user(s) by clicking on the **New** button

- 3 Type in the user's name and click **Share**. An email will automatically be sent to the user(s) notifying that they now have access.



Removing a User from a Group

- 1 Select the user you want to remove from the group by placing a **check mark** beside the user's name.
- 2 Click on **Actions**
- 3 Click on **Remove Users from Group** from the drop-down menu
- 4 A dialogue box will appear to confirm this action, click **Ok**



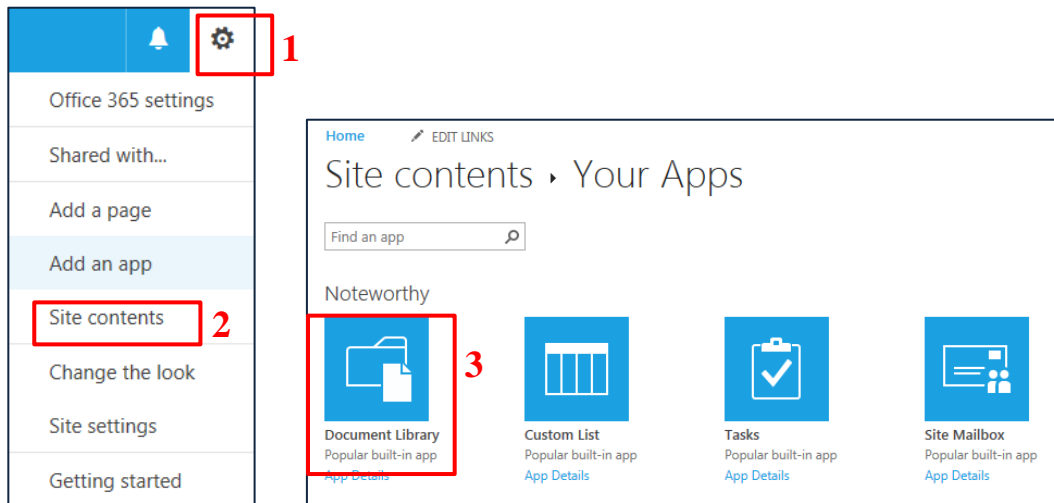
Managing Your SharePoint Online Libraries

Libraries – Step-by-Step Instructions

Create a Library

Your team documents are stored in ‘Libraries’ and as site owner, you can control and manage multiple document libraries on the team site.

1. To create a document library, click on **Settings** (the wheel icon) on the top right corner
2. Select **Add an app** from the drop-down menu
3. Select **Document Library** from “Apps you can add”
4. A message box will appear. Give your library a simple and descriptive name.
5. Click **Create**.



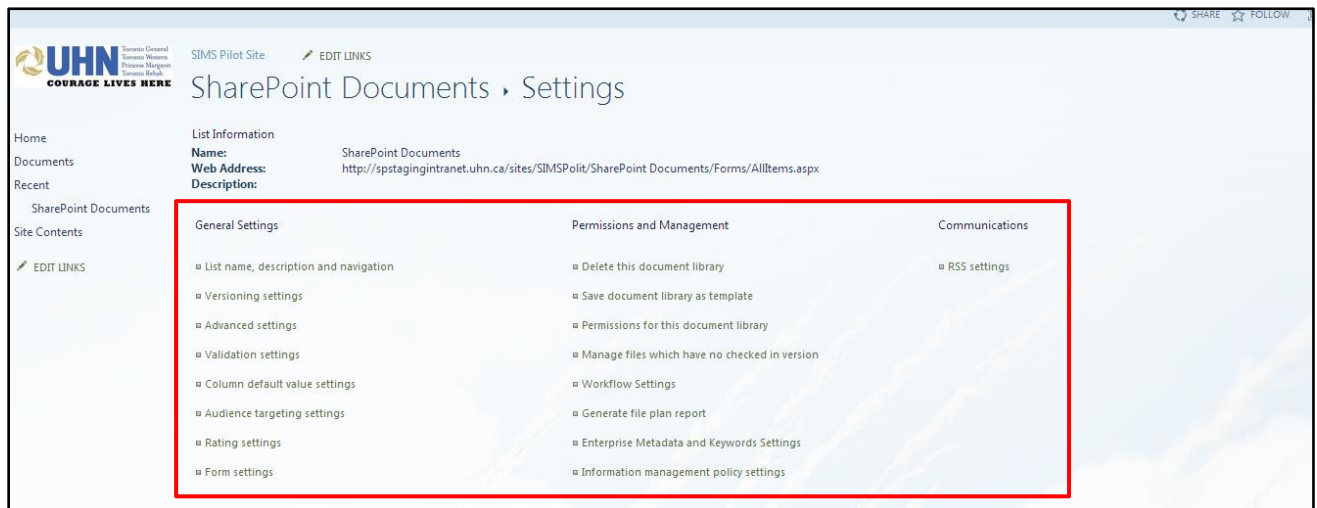
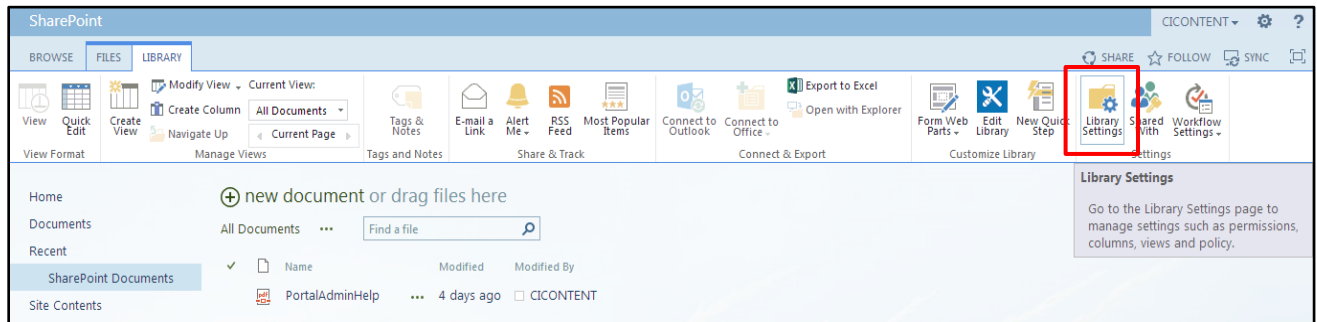
- **TIP:** To set Document Versions, click the **Advanced Options** link prior to naming the library

Edit Library Settings

Only users with **Owner** or **Contributor** permissions over the library may edit the library. To edit settings (permissions, versioning, etc.):

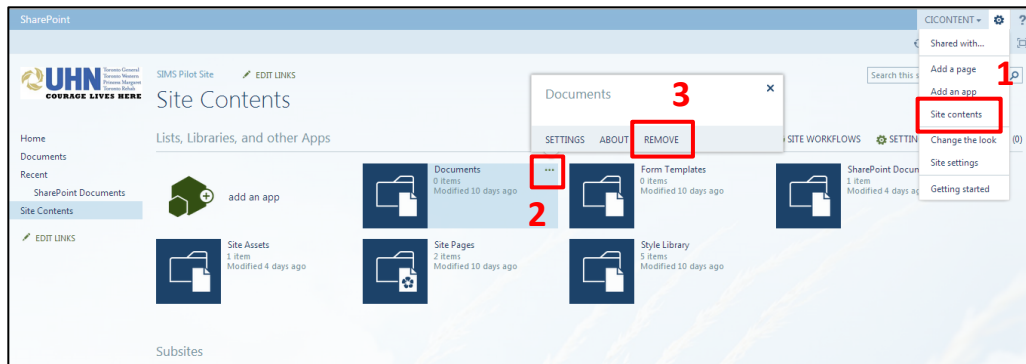
1. Browse to the **Library** you want to edit,

2. Click on **Library** on the top menu bar to open the library ribbon
3. Click on **Library Settings** on the library ribbon



Delete a Library

1. Select the Settings icon and then click on **Site Contents** from the drop-down menu
2. Put your cursor on the Library you want to delete; the box will be highlighted, then click on the **ellipsis (...)** appearing at the corner.
3. Click on **Remove** on the popped up message box then click **Ok**.



- **NOTE:** This library and its content can be recovered and restored from the **Recycle Bin** if needed up to 30 days afterwards (or until the recycle bin is full, whichever occurs first).

Library Management Tips

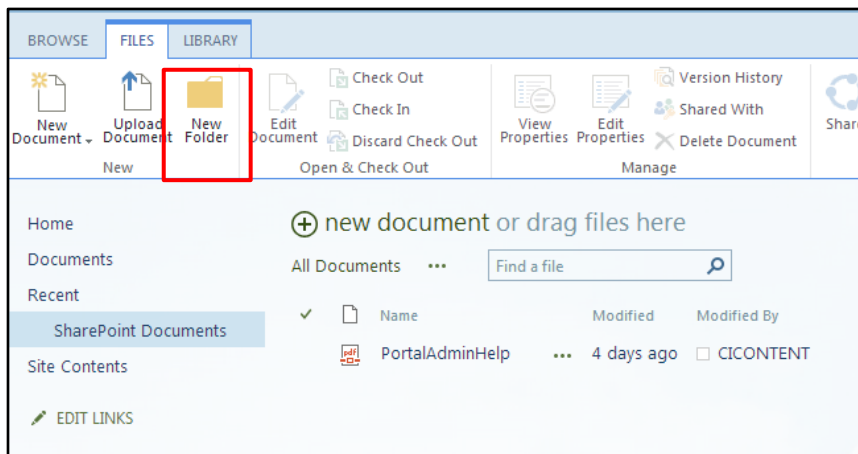
Versioning

Document library versioning is the method by which successive iterations of the document are numbered and saved.

- **NOTE:** Because a copy is made every time a new version is created, site quota limits can be reached very quickly.

Folders

Libraries should be organized using folders. Folders and subfolders can be created using the library's **New Folder** icon on the files ribbon when you click the **Files** button on the top menu bar.



- **TIPS:** SharePoint folders cannot be moved. If a folder and its contents do need to be moved, you can copy the folder to a new location and delete the original.
- **Important:** Please be advised that the above steps would erase all version histories of all documents affected.

Site Organization and Design – Information Architecture

A site’s information architecture is like the table of contents for a book. It determines how the information in that site — its Web pages, documents, lists, and data — is organized and presented to the site’s users.

As a site owner you determine the organization and presentation of Web pages, documents, lists and data within your site. This information Architecture ensures:

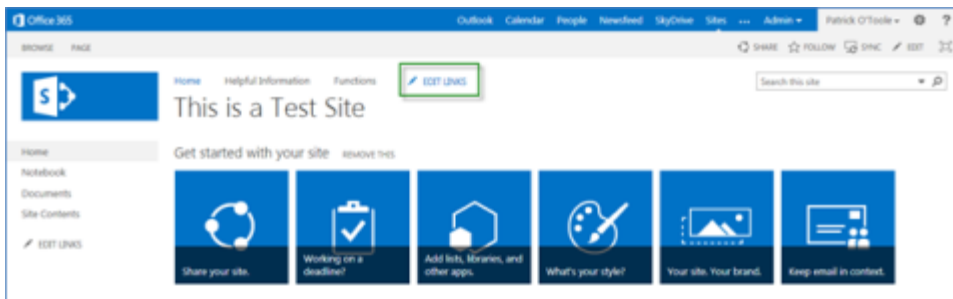
- Central access to your information
- Reduction of duplicate content and provides “one version of the truth”
- Develops standards that support cross-team or organizational sharing.
- Fosters an environment of sharing and collaboration

The Information Architecture helps you identify what can be grouped together and how it will need to exist in SharePoint. Items such as navigation, document libraries, and subsites should be carefully thought out prior to implementation.

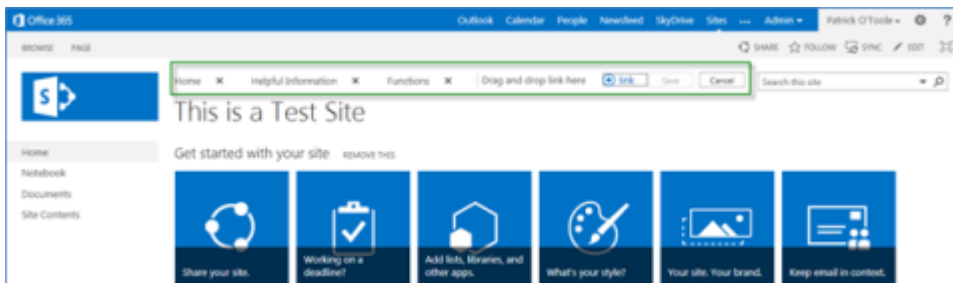
Navigation

The top link bar control displays links to the sites that are one level below the current site in a site hierarchy. It is common for the top link bar to appear at the top of each page in a site. By default, all sites that are one level below the current site are added to the top navigation, and each site has its own unique top navigation. Site owners can customize the top navigation for a specific site.

1. Click “Edit Links”



2. This allows you to add, reorder, rename and delete links from the navigation

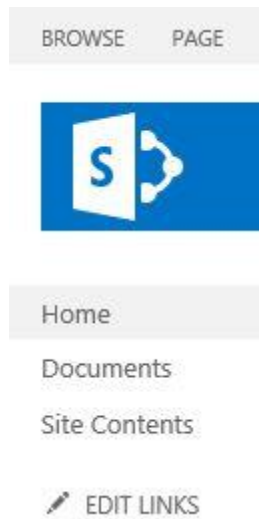


3. Similarly you can edit these links in Site Actions > Site Settings > Top link Bar.

When creating a subsite, Site owners can choose to inherit the top navigation from the parent site. This approach allows users to switch from one site to another from easily as the top navigation stays the same in all subsites

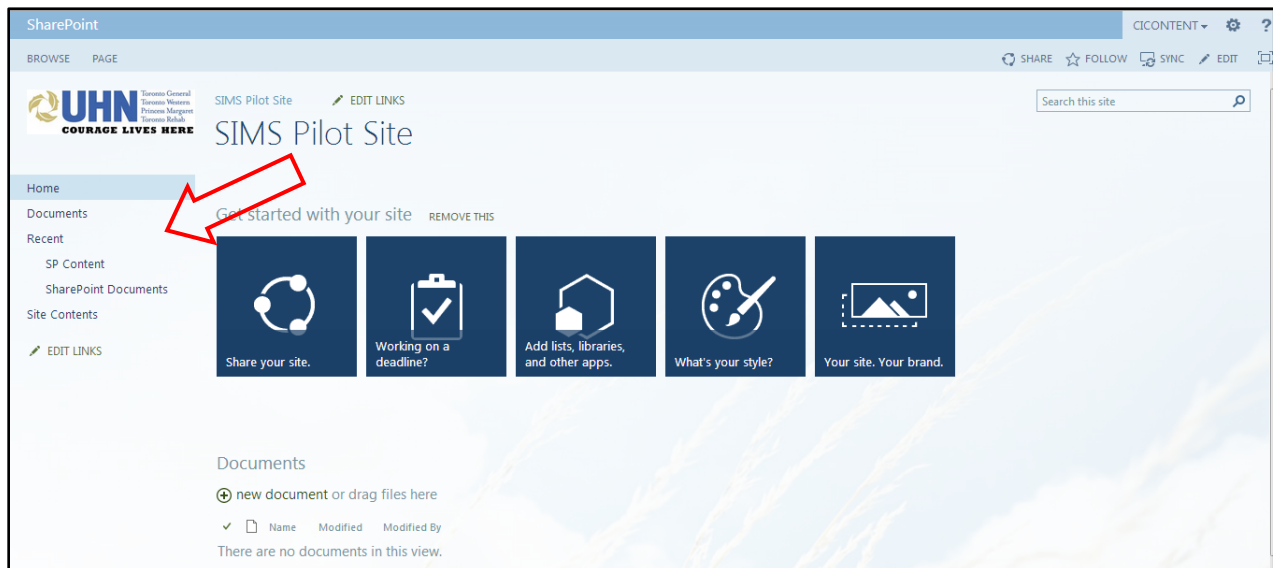
Quick Launch

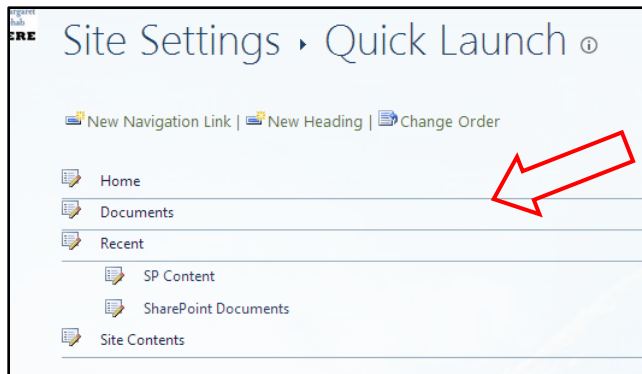
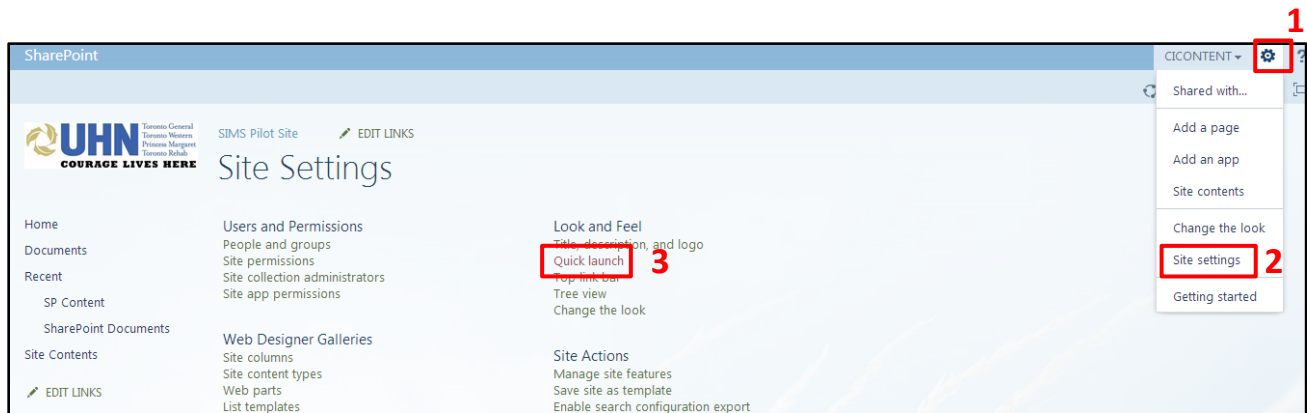
Quick launch typically highlights the important content in the current site, such as lists and libraries. It is common for it to appear on the left of each page in a site.



If you want to add, remove, or rearrange the links, click **EDIT LINKS** in the vertical navigation. You can also add, remove, rearrange links or create new headings in Site Settings for the site.

In SharePoint, the left navigation panel is known as the **Quick Launch**. It can be customized using **Settings > Site Settings > Quick Launch** (under *Look and Feel* category).



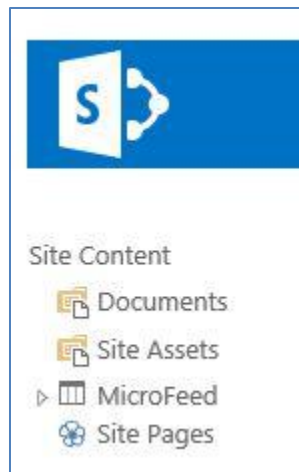


Start editing left navigation Panel

- **NOTE:** In the **Quick Launch** edit page, you can Add, Edit, Change Order, and Delete links as well as link headings

Tree View

Tree view appears on the left side of the page. If you have enabled Quick launch and Tree view, Tree view will appear below Quick launch. Tree view displays site content, such as lists, libraries, and sites that are in the current site, in a hierarchical structure.

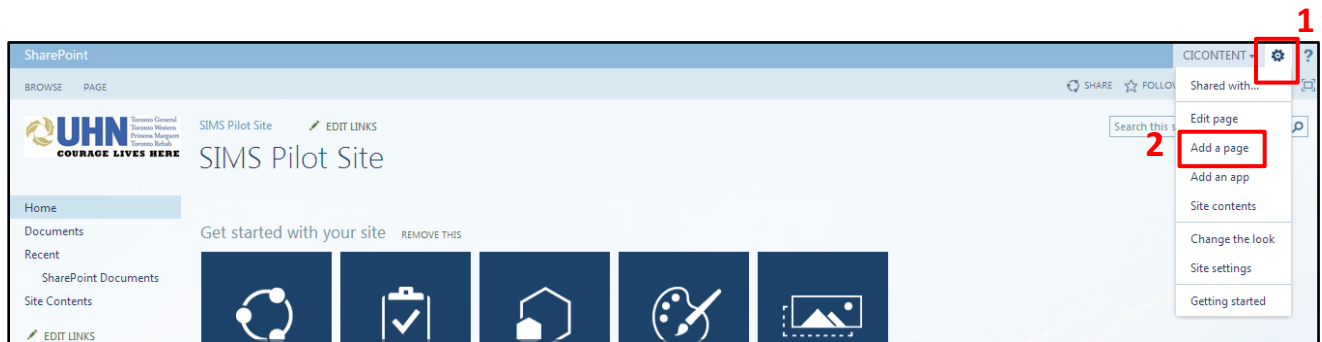


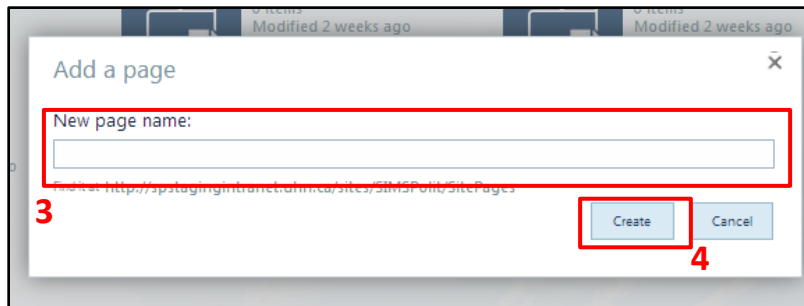
By default, tree view navigation is turned off. To enable tree view, click the gear icon in the upper-right corner and then click **Site Settings**. In the **Look and Feel** area, click **Tree view**, and then select the **Enable Tree View** check box.

Webpages

SharePoint team site pages allow you to insert text, images and WebParts into a predefined template. Adding content to these pages is similar to working in Microsoft Word as all capability and formatting tools are available in a Ribbon. To add a page to your site:

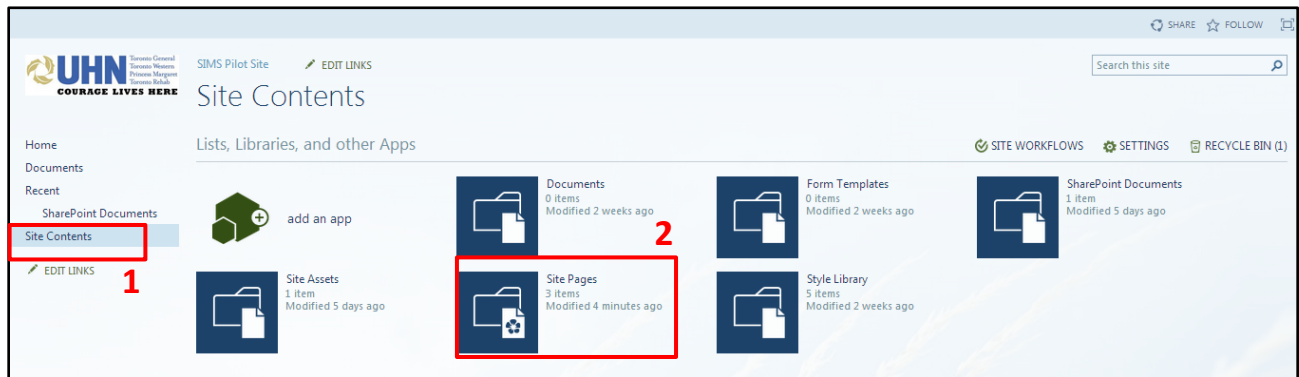
1. Click on the **Settings** (the wheel icon on the top right corner)
2. Click **Add a page**
3. A message box will appear. Give the new page a simple, unique and descriptive name.
4. Click **Create**

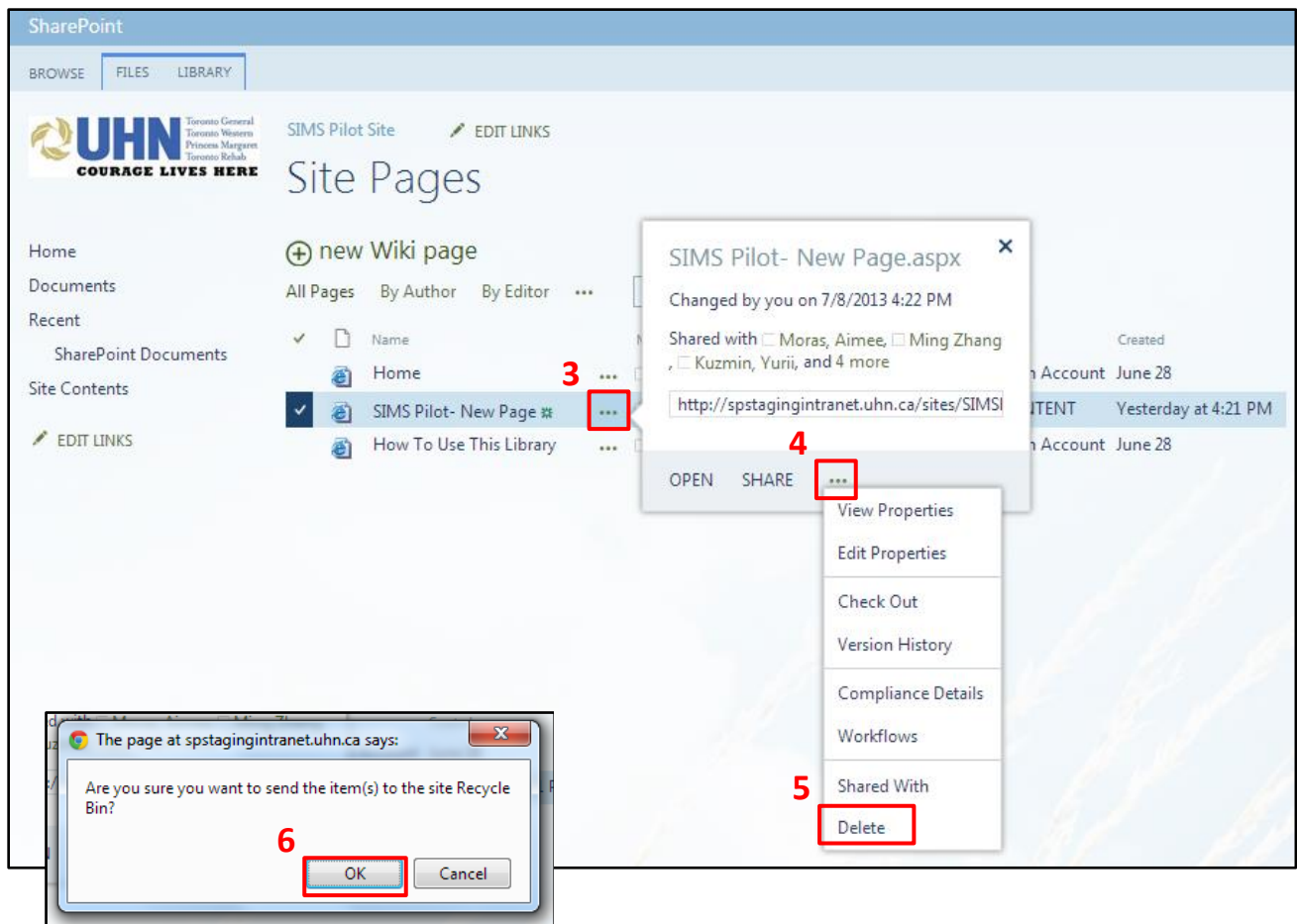




Deleting Webpages

1. Go to Site Contents on the left navigation panel
2. Click on **Site Pages**, this will give you a list of all the existing site pages
3. Place your cursor on the page you want to delete and click on the **ellipsis** beside the page name
4. Again, click on the **ellipsis** on the bottom of the popped-up message box
5. Click **Delete**
6. Click **Ok** to confirm the action






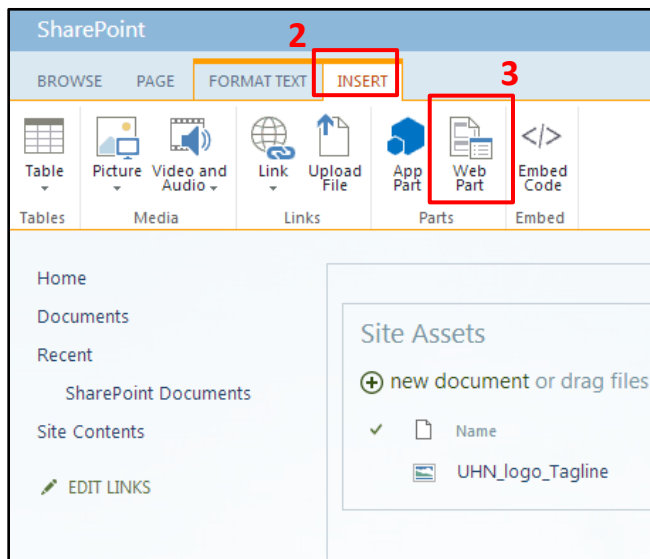
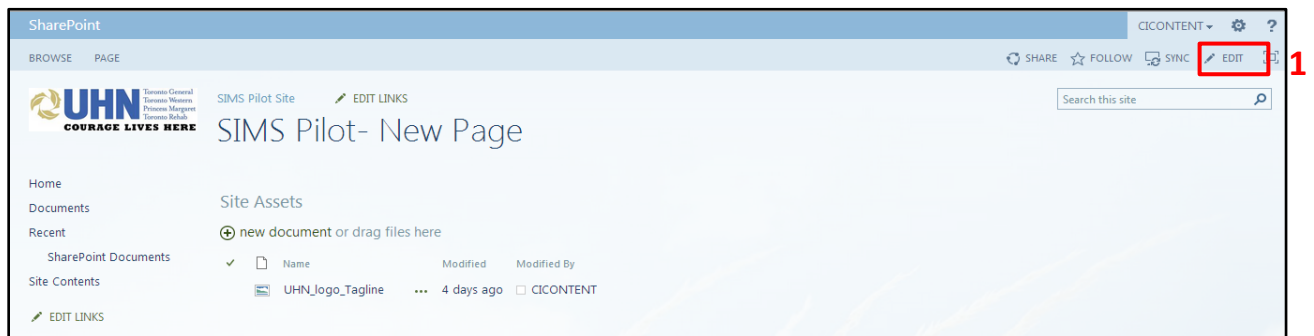
- **TIP:** If you are already on the Webpage you want to delete, simply click on **edit** on the top right corner of the window > click **Page** on the top menu bar > click **Delete Page** > click **Ok**.

Web Parts


SharePoint pages are made up of web parts. They function as building blocks which can be added, modified, and removed by Site Owners. By default, your team's SharePoint site will have these web parts: left navigation (Quick Launch), logo and document links activated. There are two main panels (Left & Right) which contain all web parts which make up the page. Web parts are added or removed from these panels.

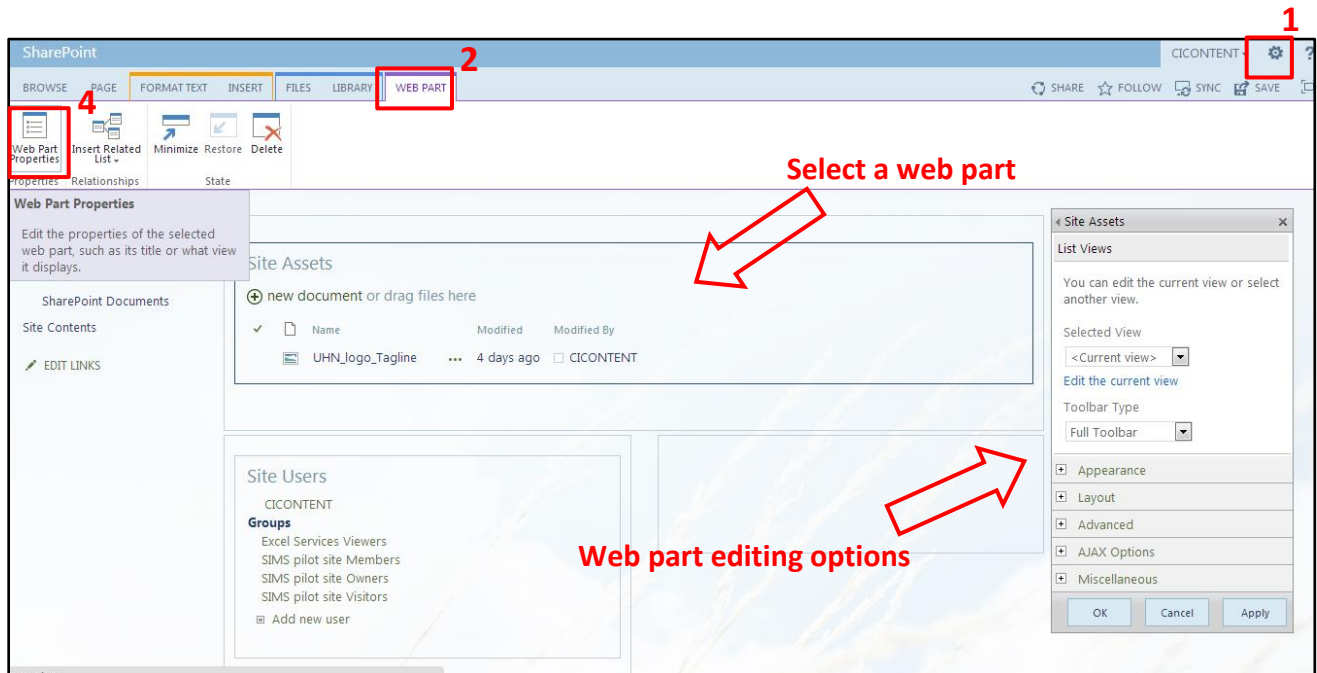
Adding a Web Part

1. To add a new Web Part, click on **Edit**  on the top right corner of the window
2. Click on **Insert** on the top menu bar to uncover the Insert ribbon
3. Click on **Web Part** and you can add/delete a web part from the given selections




Editing a Web Part

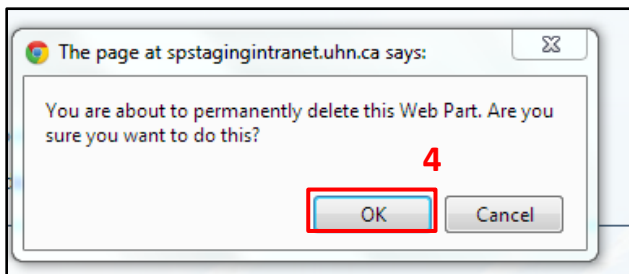
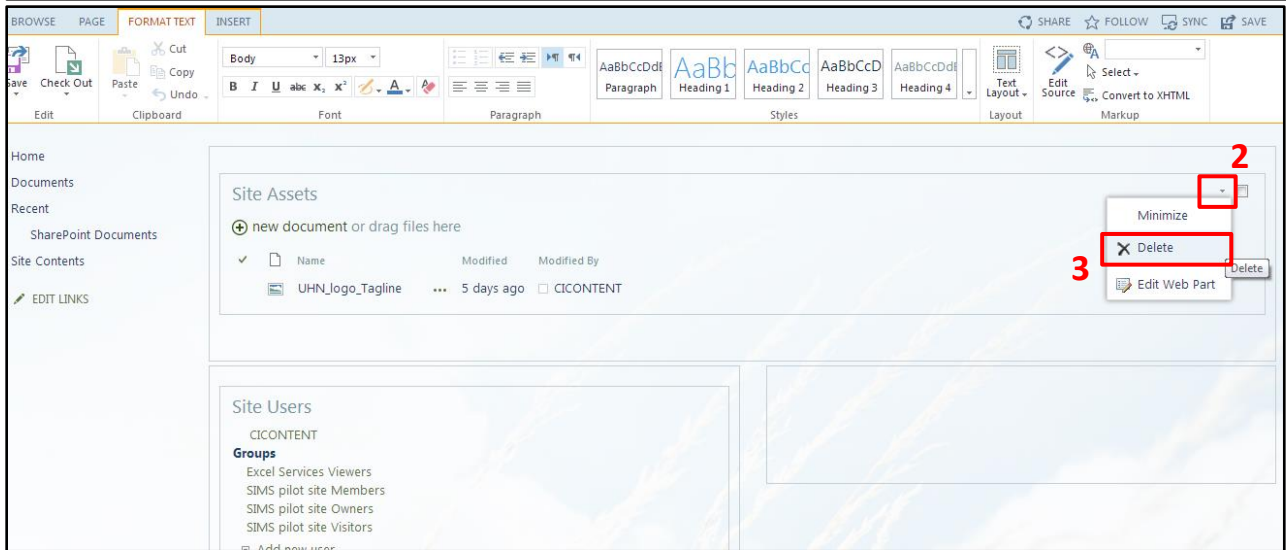
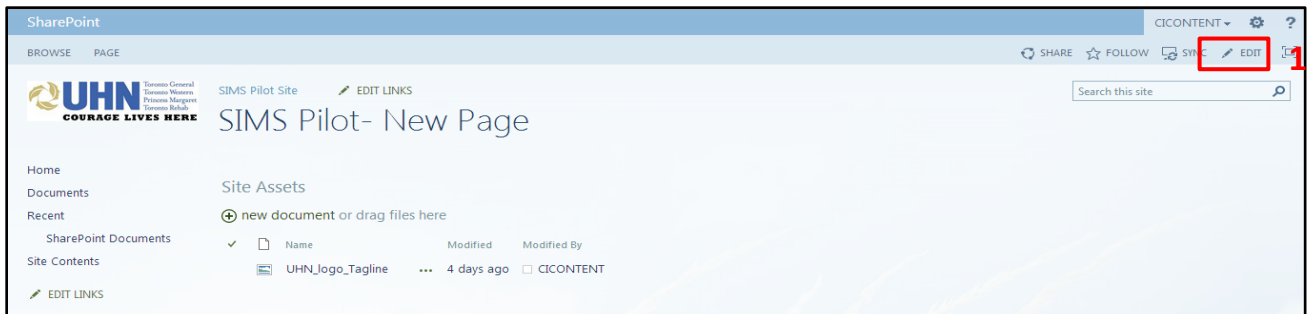
1. To edit a Web Part, click on **Edit**  on the top right corner of the window
2. Click on **Web Part** on the top menu bar to uncover the Web Part ribbon
3. Click on the desired web part
4. Click **Web Part Properties**
5. You can edit the web part from the right hand selections



Note: The order in which the web parts are displayed can be changed by clicking and dragging the web part from its title bar. They can also be dragged from one panel to another

Deleting a Web Part

1. To delete a Web Part, click on **Edit**  on the top right corner of the window
2. Put your cursor on the Web Part you want to delete, a small arrow will appear on the right of the Web Part. Click on the arrow
3. Click **Delete**
4. Click **OK** to confirm the action

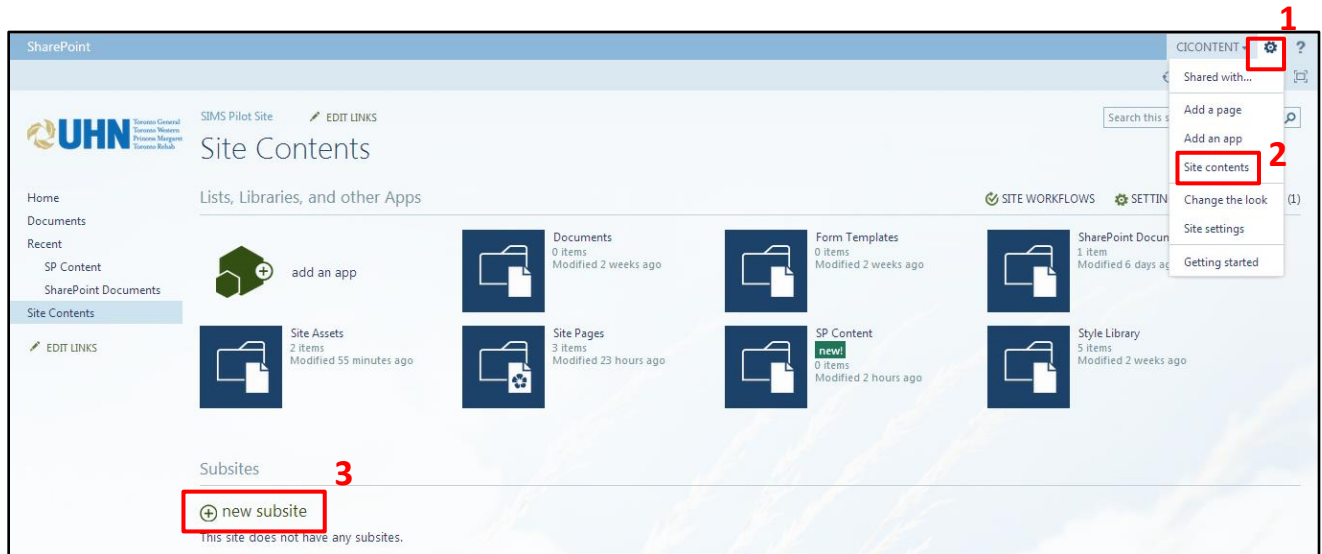


Subsites

You can use subsites to divide site content into distinct, separately manageable sites. Team sites can have multiple subsites, and subsites themselves can have multiple subsites. This hierarchy enables your team to have a main working site for whole team collaboration plus subs-sites or work spaces for projects or for data that is relevant only to a sub-set of team members.

Like all components in SharePoint, subsites can inherit permissions from the parent site or they can have their own independent permissions and Site Owners. Please read the section on permissions for more information. To create a subsite:

1. Click **Settings** (the wheel sign on the top right corner)
2. Select **Site Contents** from the drop-down menu
3. Click on **new subsite** under the Subsites header at the bottom of the page
4. Fill out the form for the new SharePoint Site (subsite)
5. Click **Create** to confirm the action



Site Contents > New SharePoint Site

Title and Description

Title:

Description:

Web Site Address

URL name:

http://spstagingintranet.uhn.ca/sites/SIMSPolit/

Template Selection

Select a template:

Collaboration Enterprise

Team Site

Blog

Project Site

Community Site

A place to work together with a group of people.

Permissions

You can give permission to:

User Permissions:



Navigation Inheritance

Use the top link bar from the parent site?

Yes No

Create Cancel

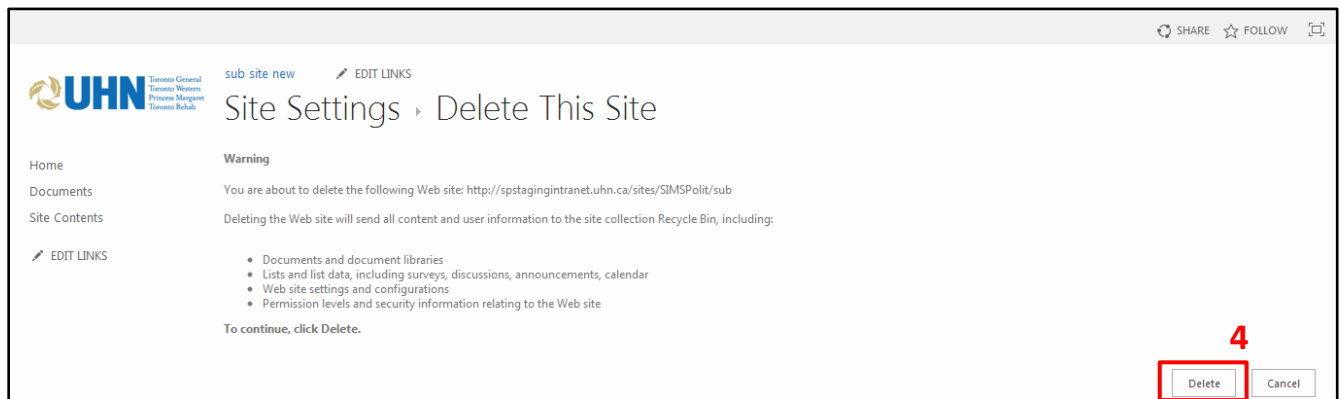
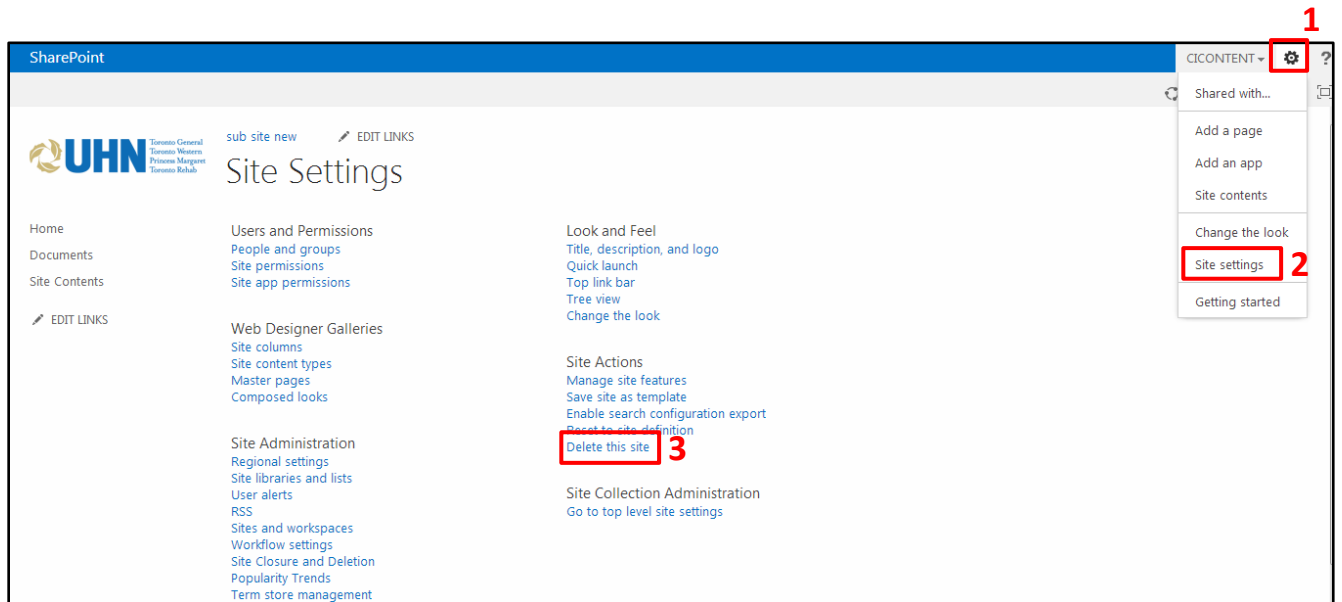
➤ **TIPS:**

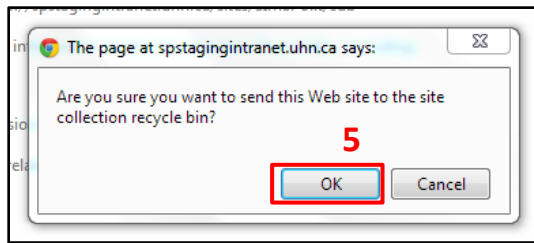
- **Title:** Should be short and descriptive
- **URL name:** Should be short and should not contain spaces, this can't be modified in future
- **Template:** Team site - this is the default template for UHN's SharePoint sites
- **User Permissions:** Use same permissions as the parent. This will make owners of the parent as owners of the subsite as well; otherwise parent owners will have no permissions.
- Accept all defaults on radio buttons

Deleting a Subsite

Only Site Owners can delete subsites. When a subsite is deleted all of its components are deleted as well. Note that deleted subsites are not sent to the Recycle Bin, as would be the case for documents. Therefore Site Owners should consider deleted sites unrecoverable and thus exercise caution. To delete a subsite:

1. While on any of the subsites pages, click **Settings**
2. Select **Site contents**
3. Click **Delete this site** under the “Site Actions” category
4. Click **Delete**
5. Click **Ok** to confirm the action





- **NOTE:** It is possible to delete the parent site, so please exercise caution and **confirm the site before you click delete.**

Workspaces

A workspace is a unique area that provides team members with collaboration tools and services for documents or meeting resources. A workspace can contain lists of information, such as related documents, team members, and links.

Document Workspace	A site for team members to use to work together on documents. It provides a document library for storing the primary document and supporting files, a Task list for assigning to-do items, and a Links list for resources related to the document.
Basic Meeting Workspace	A site that provides all the basics to plan, organize, and track your meeting. It contains the following lists: Objects, Attendees, Agenda, and Document Library.
Blank Meeting Workspace	A blank Meeting Workspace site that you can customize based on your requirements.
Decision Meeting Workspace	A Meeting Workspace that team members can use to review relevant documents and to record decisions. It contains the following lists: Objectives, Attendees, Agenda, Document Library, Tasks, and Decisions.
Social Meeting Workspace	A site that provides a planning tool for social occasions, featuring a discussion board and a picture library to post pictures of the event. It contains the following lists and Web Parts: Attendees, Directions, Image/Logo, Things To Bring, Discussions, and Picture Library.
Multipage Meeting Workspace	A site that provides all the basics that team members can use to plan, organize, and track their meetings with multiple pages. It contains the

following lists: Objectives, Attendees, and Agenda, in addition to two blank pages that you can customize based on your requirements.

Site Governance Plan

A Governance plan is a set of rules that help facilitate the use, maintenance and operations of your SharePoint team site. As a Site Owner you are responsible for creating, and ensuring adherence to the governance rules defining your site. The information below should be a helpful step in the development of your site's Governance plan.

Note: Recommendations are identified *in blue italic* text.

Subsite creation

You might want your team members to be able to create subsites under the team site for use on specific projects. Being able to spontaneously create new subsites can be a great benefit to the group, but unrestricted site creation can get out of hand. When subsites proliferate freely, problems can arise. For example:

- It's hard for users to find the right subsite, or be sure if they have.
- Information can be duplicated in several subsites, using up expensive storage space, and requiring duplicated effort to maintain.
- Out-of-date information can reside on subsites, potentially for years, showing up in search results. It can be hard to tell what version of information is correct.
- Managing permissions for a multitude of subsites can become a major chore, and users might inadvertently wind up with access to information they really shouldn't have.
- As employees leave the group, the subsites they create may be abandoned, creating confusion and muddying search results for remaining site users.

UHN Digital Guidelines on Site Governance:

- Who is allowed to create subsites? *Site Owner only*
- Do new subsites need to be approved in advance? If so, what are the criteria for approval, and who grants the approval? *Site Owner approval based on business value and length of project/collaboration.*
- Should new subsites use established templates and themes? *Home site (your site) themes and layouts should be followed for ease of use*
- How much information may be stored on a site? (That is, how much server disk space can it take up?) *Reminder: The 5 GB site quota will be shared by all subsites.*
- What are the rules for including navigation strategies on the site? *Should follow home site.*
- How long should information be stored on subsites before it is deleted or archived? *Content audit should occur every 6 months, duplicated and aged content should be*

deleted adhering to legal compliance. Projects which are in closed status should be archived

Additional File Management Features

Before proceeding with any of the items, please remember that you will be responsible for implementing, maintaining and training staff.

Require check-out of files

When you require check-out of a file, you ensure that only one person can edit the file until it is checked in. Requiring documents to be checked out prevents multiple people from making changes at the same time, which can create editing conflicts and lead to confusion. Requiring check-out can also help to remind team members to add a comment when they check a file in, so that you can more easily track what has changed in each version.

Track versions

If you need to keep previous versions of files, libraries can help you track, store, and restore the files. You can choose to track all versions in the same way. Or you can choose to designate some versions as major, such as adding a new chapter, and some versions as minor, such as fixing a spelling error. To help manage storage space, you can choose the number of each type of version that you want to store.

Require document approval

If your library contains important guidelines or procedures that need to be final before others see them you can specify that approval for a document is required. Documents remain in a pending state until they are approved or rejected by someone who has permission to do so. You can control which groups of users can view a document before it is approved.

Stay informed about changes

Libraries support RSS technology, so that members of your workgroup can automatically receive and view updates, or feeds, of news and information in a consolidated location. You can use RSS technology to alert you of any changes to a library, such as when files that are stored in the library change. RSS feeds enable members of your workgroup to see a consolidated list of files that have changed. You can also create e-mail alerts, so that you are notified when files change.

Advanced Features

Workflows

A SharePoint workflow is an automated way of moving documents or items through a sequence of actions or tasks. Three workflows are available to libraries by default: Approval, which routes a document to a group of people for approval; Collect Feedback, which routes a document to a group of people for feedback and returns the document to the person who initiated the workflow as a compilation; and Collect Signatures, which routes a document to a group of people to collect their digital signatures.

Define content types

If your group works with several types of files, such as worksheets, presentations, and documents, you can extend the functionality of your library by enabling and defining multiple content types. Content types add flexibility and consistency across multiple libraries. Each content type can specify a template and even workflow processes. The templates act as a starting point, for formatting and any boilerplate text and for properties that apply to the documents of that type, such as department name or contract number.

Site lifecycle and retirement

Sites such as document worksites and discussion sites tend to hang around after they are no longer useful, using up valuable storage space and muddying search results. It's a good idea to set a schedule for reviewing sites and their contents (twice a year) to see if they are worth keeping.

Customization

You might also want to set guidelines about the functionality people can use on their subsites. For example, ask that people not use Web Parts that would require any custom coding. Custom coding is not supported by the Corporate Intranet team and they may not be able to assist you with issues.

Search

In SharePoint, content appears in many places including sites, lists, libraries, Web Parts, and columns. By default, when someone searches your site, all the content on the site or any of its subsites appear in the Search results.

As a site owner, you can choose whether or not the content on your site appears in search results. The governance plan should outline when (if ever) you should prevent the content of a site from appearing in search results.