

SharePoint Online

Getting Started Guide for Site Owners

Table of Contents:

1. [Site Owner 101 – Roles and Responsibilities](#)
2. [Granting & Managing Permissions in SharePoint Online](#)
3. [Managing Libraries in SharePoint Online](#)
4. [Site Organization & Design – An Introduction to Information Architecture](#)
5. [Creating a Site Governance Plan](#)



UHN Digital

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Site Owner 101 – Roles & Responsibilities

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

What can I do as a SharePoint Online Site Owner?

- Manage user permissions (i.e., Control who can contribute vs. read only)
- Create, edit, and delete content
- Modify the layout of pages
- Add sub-sites, web parts and objects (e.g. lists, calendars, task trackers, etc.)
- Permanently delete objects (including the entire site itself – **please be careful!**)

Key Responsibilities

Permissions Management

Assigning and managing user access and security level

Information Architecture

The content organization and presentation of your pages, documents and lists

Governance

Creating and implementing a Site Governance Model

Policy Conformance

Conformance and adherence to government and corporate policies and guidelines

Training

Provide training and support to all users of your site. You may also be required to identify and train future site owners if you can no longer fulfill the role.

Granting & Managing Permissions in SharePoint Online




All Permissions Settings Available 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.

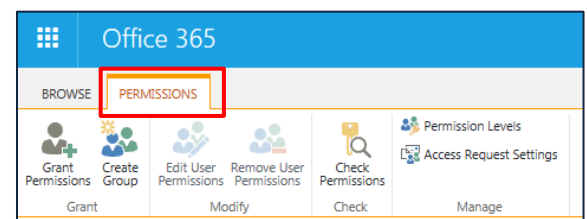
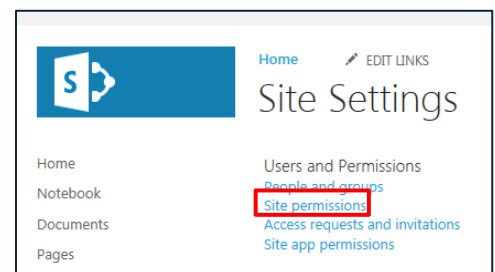
Generally only **three** permissions groups will be needed for your site:

Full Control	Contribute	Read
 For Site Owners	 For team members	 For site visitors


How to select site permissions for your team

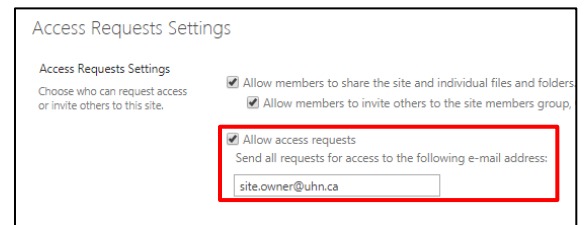
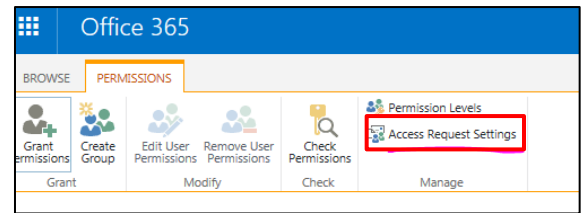
1. Click on the Settings icon  and then select **Site settings**.
2. Select **Site Permissions** under the *Users and Permissions* heading.
3. The **Permission ribbon**, visible at the top of your page, will display with options to Grant, Modify, Check and Manage.

You can add, change or remove permissions through this ribbon.




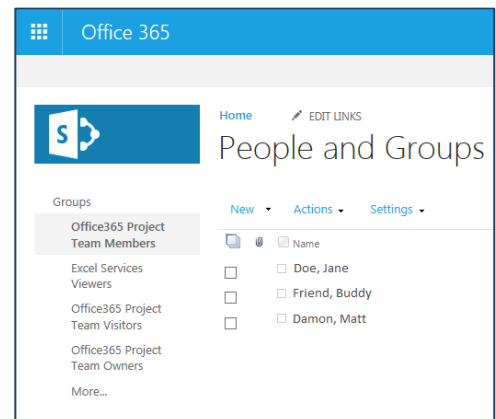
How to receive email notifications for access requests

1. From your SharePoint Online site home page, click on the Settings icon  and select **Site settings** and then **Site permissions**.
2. Along the top ribbon, ensure you select the **Permissions** tab, and click **Access Request Settings**.
3. Ensure Allow access requests is checked.
4. Enter your email address under **Send all requests for access to this following email address**.



Viewing Members of a SharePoint Online Group

1. Click on the Settings icon  and then select **Site settings**.
2. Select **People and Groups** under the *Users and Permissions* heading.
3. Click on the group name from the left hand side menu to display all members of that particular group.



Adding or removing a user to a SharePoint Online Group

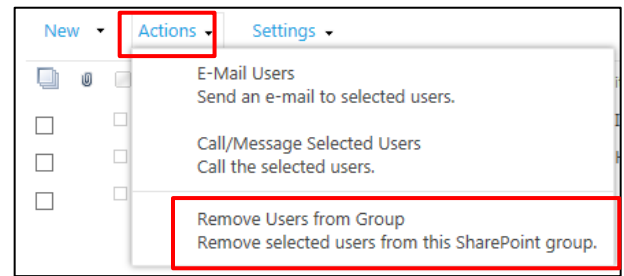
Adding:

1. From the People and Groups page, select the **New** button to add new users.
2. 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:

1. From the People and Groups page, select the user you want to remove by checking the box next to their name.


2. Select **Actions** and then click **Remove Users from Group**.
3. A dialogue box will appear to confirm the action. Click **Ok**.

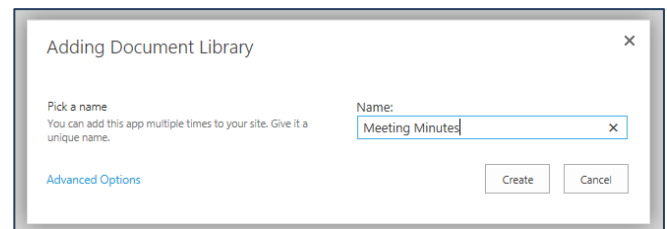
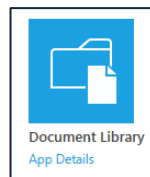


Managing Libraries in SharePoint Online

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

Creating a New Library

1. From your SharePoint Online site, click on the Settings icon  and then select Add an app from the drop-down menu.
2. Select **Document Library** on the page
3. Name your Library and click **Create**.



Library Management Tips

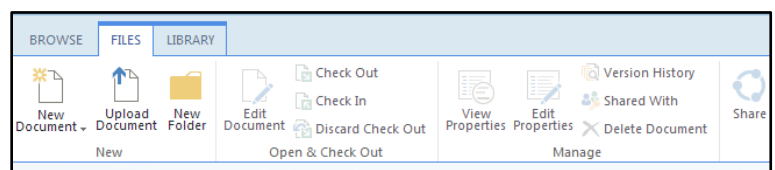
Versioning

Document library versioning is the method of automatically saving successive iterations of the document. By default, versioning is disabled on libraries, however we recommend enabling this feature for libraries containing business frequently co-edited documents or business critical information.

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**



NOTE: 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.

icon on the files ribbon when you click the **Files** button on the top menu bar.

Changing the name of a Library

1. Navigate to your list and in the ribbon at the top click on **Library**, and under Settings click on **Library Settings**.



2. Under General Settings, click on **List name, description and navigation**, edit the name and click save.

Settings ▸ General Settings

General Settings

- ▣ **List name, description and navigation**
- ▣ Versioning settings
- ▣ Advanced settings
- ▣ Validation settings
- ▣ Audience targeting settings
- ▣ Rating settings
- ▣ Form settings

Name and Description

Type a new name as you want it to appear in headings and links throughout the site. Type descriptive text that will help site visitors use this document library.

Name:

Description:

Navigation

Specify whether a link to this document library appears in the Quick Launch. Note: it only appears if Quick Launch is used for navigation on your site.

Display this document library on the Quick Launch?

Yes No

Deleting a Library

1. Follow step one from 'Change the name of a Library'.
2. Under Permission Settings, click on **Delete this library**, and click on OK.

Permissions and Management

- ▣ **Delete this document library**
- ▣ Save document library as template
- ▣ Permissions for this document library
- ▣ Manage files which have no checked in version
- ▣ Workflow Settings
- ▣ Generate file plan report
- ▣ Enterprise Metadata and Keywords Settings
- ▣ Information management policy settings

Site Organization & Design

An Introduction to Information Architecture

As a site owner you determine the organization and presentation of Web pages, documents, lists and data within your site. This means, you will be overseeing the Information Architecture of your site, to ensure your files are well-organized and easily accessible to the right people.

Information architecture principles include:

- Providing central access to your information
- Reducing duplicate content and ensuring there is a single source of the truth
- Developing standards that support cross-team or organizational sharing.
- Fostering an environment of sharing and collaboration

Items to support your Information Architecture

Navigation Tools

For ease of navigating your site, there are areas on your site where key links are always visible. This includes the Top Link Bar and the Quick Launch (the left-side menu panel on every page).

Webpages

SharePoint team site pages allow you to insert text, images and Web Parts into a predefined template.

Web Parts

SharePoint Online 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 Online site will have these web parts activated: Quick Launch, logo and document links.

Subsites

You can use subsites to divide site content into distinct, separately manageable sites. Team sites can have multiple subsites, and subsites can also have multiple subsites. This structure enables your team to have a main working site for whole team collaboration plus subsites or workspaces for projects or for data that is relevant only to a subset of team members.

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.

For advanced information on Information Architecture, please refer to the [SharePoint Online Advanced Features Manual](#).

Creating a 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.

Subsite creation

You might want your team members to be able to create subsites under the team site for use on specific projects. However, you will want to monitor this site creation to ensure it is well managed.

Poorly managed subsite creation can cause:

- Difficulty for users to find the correct subsite
- Duplicate sources of information within several subsites, using up storage space, and requiring duplicated effort to maintain.
- Out-of-date information to reside on subsites, potentially for years. It can be hard to tell what version of information is correct.
- Additional burden for site owners to manage permissions for a multitude of subsites. Users might inadvertently wind up with access to information they shouldn't have.
- Confusion and muddled search results, particularly as employees leave the group and no longer manage their subsite.

UHN Digital Guidelines on Site Governance:

1. Who is allowed to create subsites?
Site Owner only
2. 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.
3. Should new subsites use established templates and themes?
Team Site themes and layouts should be followed for ease of use
4. What are the rules for including navigation strategies on the site?
Should follow home site.
5. 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.