



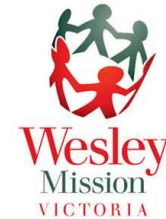
INTRODUCTION TO SHAREPOINT

CONNECT AND EMPOWER YOUR ORGANISATION

Mark Walters– Senior IT Consultant

06/02/2019

Infoxchange is a not for profit organisation that has supported more than 200 non-profits to move to Office 365 and SharePoint including:



Post
Placement
Support
Service



Agenda

1. SharePoint as part of Office 365
2. What is SharePoint online?
3. Common uses by other NFPs
4. Key functions of SharePoint
5. Limitations and challenges
6. Alternative applications
7. Implementation considerations and stages
8. Best practice and important things to remember
9. Top tips and resources



The full suite of Office 365

 Admin Your admin web port	 OneNote Capture notes by typing, d	 SharePoint Share and manage content, kni across the organization.	 Video Share videos of classes, mee
 Calendar Schedule and share m	 Outlook Use business-class email t	 Social Engagement Gather insights, meet custom	 Word Bring out your best writing. i
 Delve Get personal insights	 People Organize your contact info	 StaffHub Manage your work schedule or	 Yammer Connect to the right people,
 Dynamics 365 Break down the silos l	 Planner Create new plans, organize	 Stream Share videos of classes, meetin	
 Excel Do more with the too	 PowerApps Build mobile and web app:	 Sway Create and share engaging inte	
 Flow Create workflows betw	 PowerPoint Take your presentation to t	 Tasks Create and manage tasks in Ou	
 Forms Create surveys, quizzes	 Project Develop project plans, assi	 Teams The customizable chat-based t	
 OneDrive Store your files in one	 Security & Compliance Meet your organization's k	 To-Do Manage, prioritize, and comple	

Office 365 E1licenses (including SharePoint) are free for eligible NFPs



Microsoft Roadmap

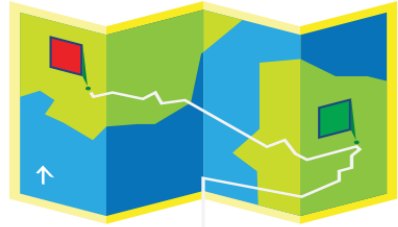
Recent upgrades:

- » SharePoint sync tool upgrade
- » New library experience
- » New mobile apps
- » Integration of Groups and sites
- » New sync tool for Mac
- » Teams for discussion
- » Flow for workflow
- » Power Apps / forms

Office 365 Roadmap

The Office 365 Roadmap lists updates that are currently planned for applicable subscribers. Updates are at various stages from being in development to rolling-out to customers to being generally available for applicable customers world-wide.

[Office 365 Release Options](#) [Service Updates FAQ](#)



LAUNCHED ROLLING OUT IN DEVELOPMENT CANCELLED PREVIOUSLY RELEASED

FILTERS ☐ Only show features updated within 30 days ☐ Only show features added within 30 days

 **Launched (26)** Fully released updates that are now generally available for applicable customers 

 **Rolling out (39)** Updates that are beginning to roll-out and are not yet available to all applicable customers 

 **In development (106)** Updates that are currently in development and testing 

 **Cancelled (3)** Previously planned updates that are no longer being developed or are indefinitely delayed 

<http://fasttrack.microsoft.com/roadmap>



What is SharePoint online?

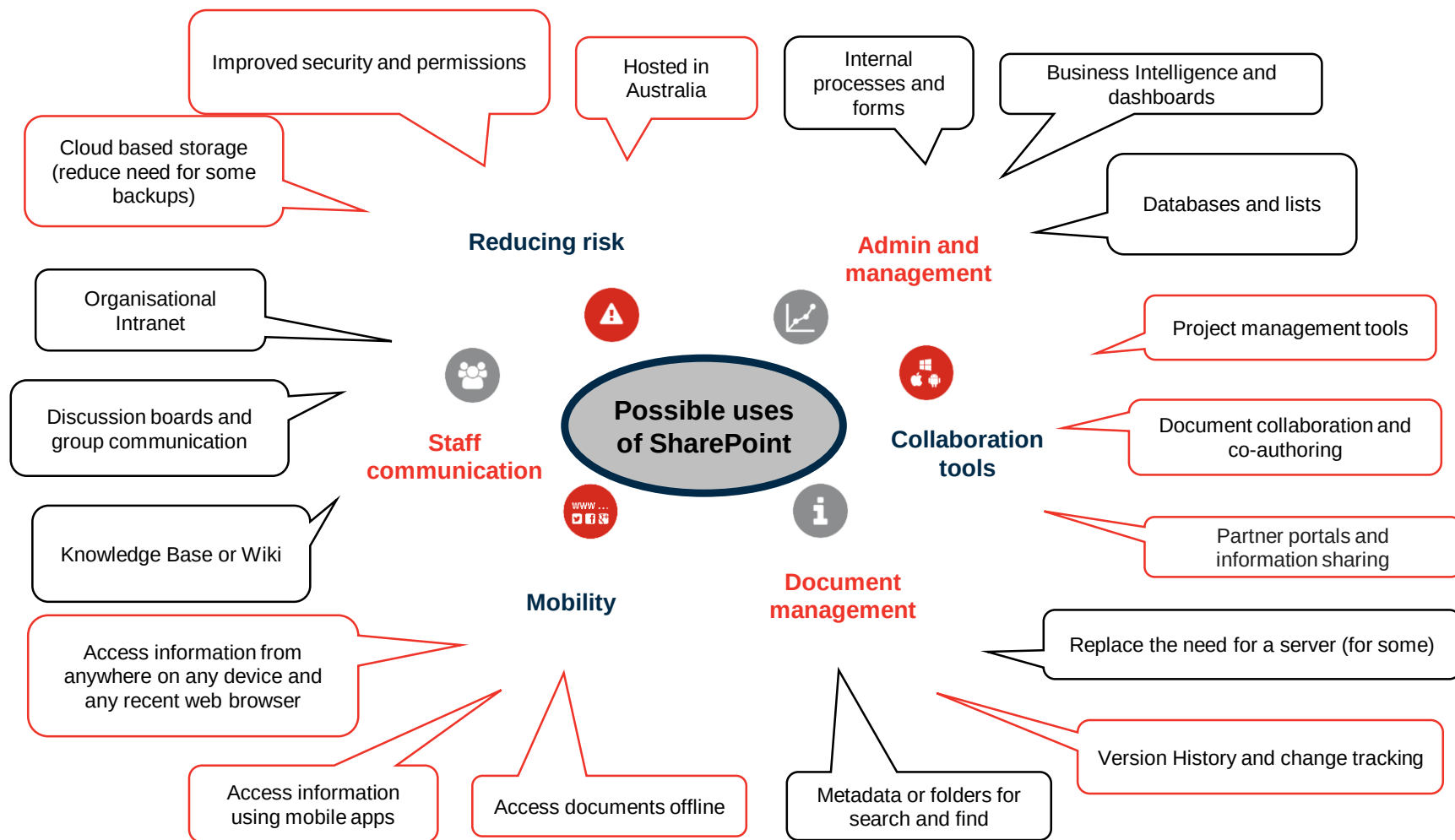


“A cloud-based service, hosted by Microsoft, for businesses of all sizes. Instead of installing and deploying SharePoint Server on-premises, any business can subscribe to an Office 365 plan or to the standalone SharePoint Online service. Your employees can create sites to share documents and information with colleagues, partners, and customers.” Microsoft

The current server based version is SharePoint 2016



Common uses from other non-profits

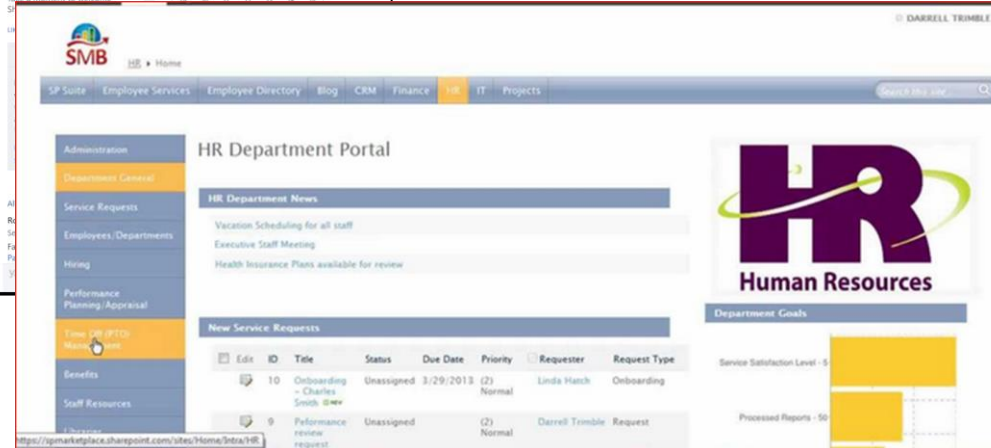
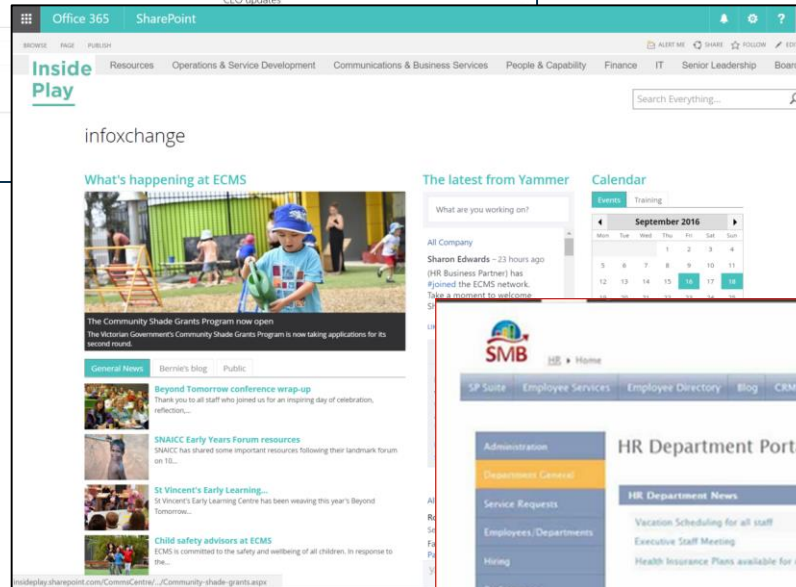
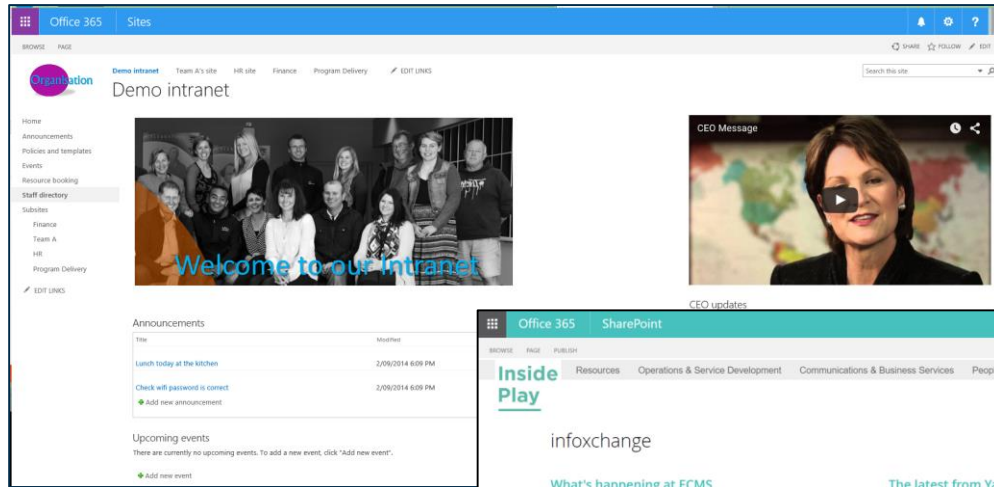


SharePoint does...

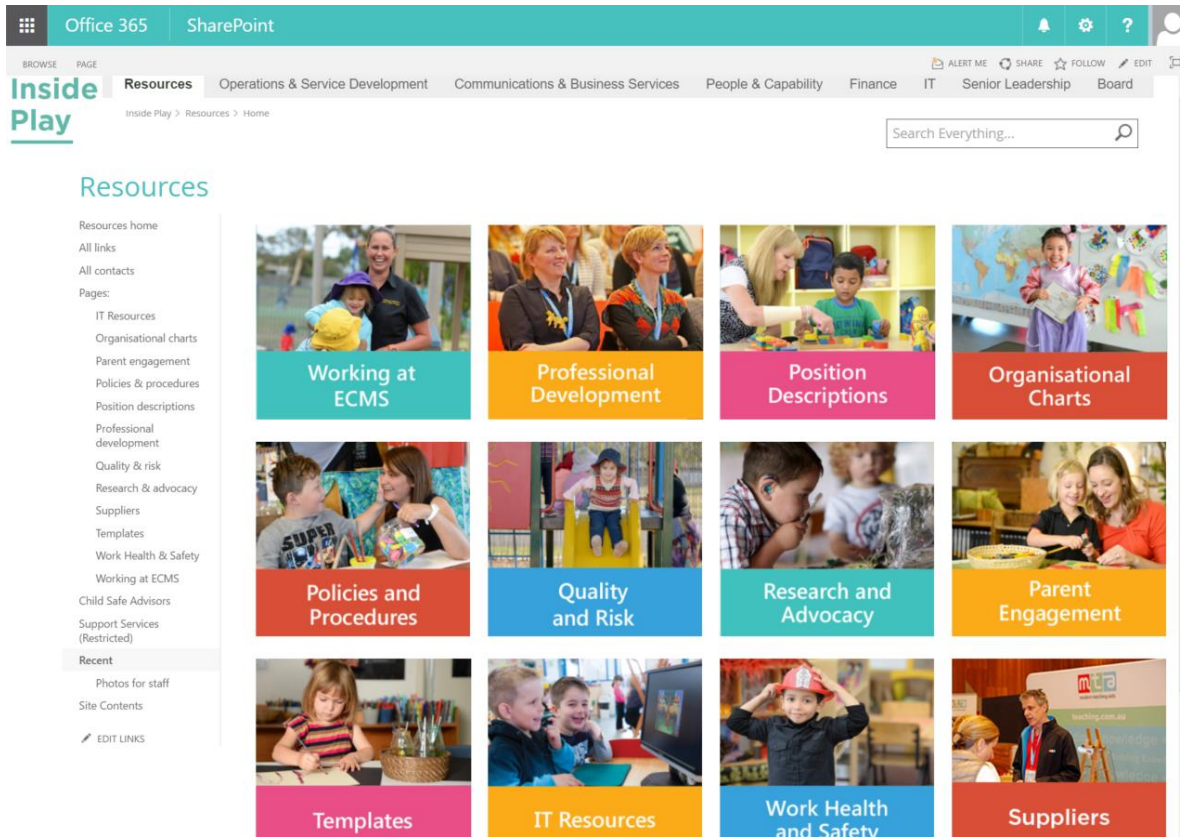
- » **Intranet** – Serves as the platform for organisation's internal homepage, a central hub of useful information and communication for organisations.
- » **Team /project sites** – Supports teams working on projects together by providing a centralised spot for tasks, calendars, documents, links and other useful tools.
- » **Administration Process** – SharePoint can be used to collect data through forms, store data in lists and manage internal processes using workflows
- » **Document management** – Provides sophisticated document libraries for storing and working on documents



Intranet



Information sharing – pages

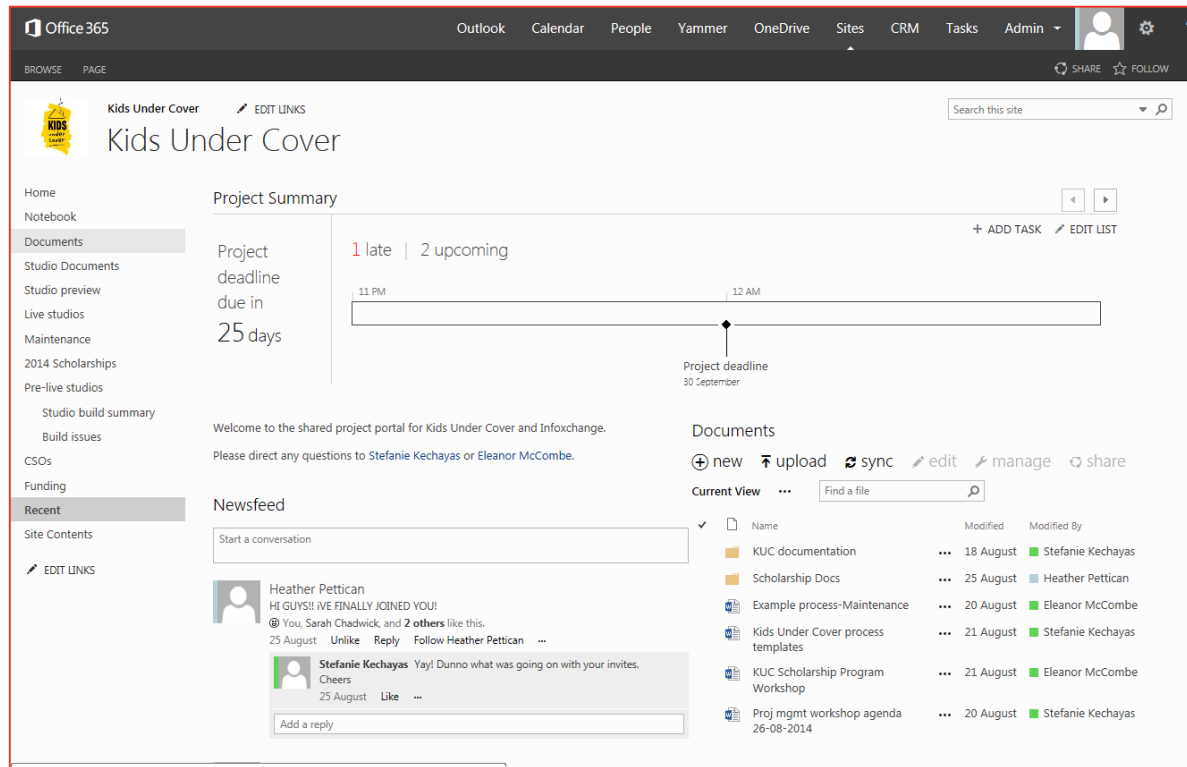


Potential sharing functions include:

- » Knowledge Base
- » Policies/Procedures
- » Image Gallery
- » Templates
- » Wiki
- » CEO blog
- » News
- » Org Chart



Collaboration - sites



Potential collaboration functions include:

- » Project management
- » Team news feeds
- » Blogs
- » Discussion Boards
- » Coauthoring on documents eg tenders
- » Shared Calendars
- » Shared tasks
- » Central registers
- » Board portals
- » Partner portals



Collaboration Examples

Board

Home
Documents
Links
Contacts
Board Meetings
Notebook
Recent
Apps
Board meetings
Site Contents
EDIT LINKS



Board Meetings

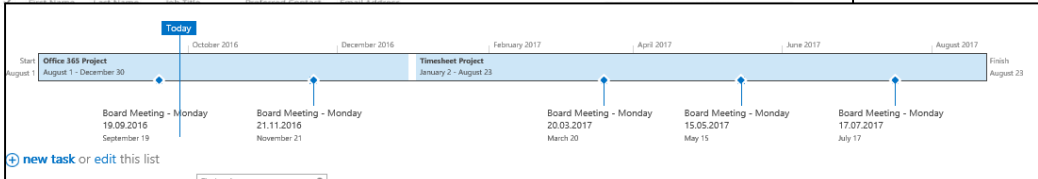
September 2016

Mon	Tue	Wed	Thu	Fri	Sat	Sun
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

September events:

Welcome to the Board subsite

Board contacts



Office 365 Project
August 1 - December 30

Timesheet Project
January 2 - August 23

Board Meeting - Monday
19.09.2016
September 19

Board Meeting - Monday
21.11.2016
November 21

Board Meeting - Monday
20.03.2017
March 20

Board Meeting - Monday
15.05.2017
May 15

Board Meeting - Monday
17.07.2017
July 17

new task or edit this list

All Tasks Calendar Completed Find an item

Task Name	Due Date	Assign
Project communication and management	April 24, 2017	
Project Management	June 22, 2017	
Board Budget Review and Approval	August 1	
Install Microsoft Project onto Annie-Sai-PC	July 22	
Put in place Cybersecurity Insurance	August 4	
Define communication strategy	July 29	
Develop communication templates	August 1	
Approve communication templates	August 8	
Create Budget Reporting template for Board Meetings	August 1	
Initial Communications re Project commencement	August 2	
Communicate to all staff New ICT Support Officer and role	August 1	
Send Initial Communication to all staff re Project commencement	August 1	
Communicate the Comms Strategy to relevant parties	August 1	
Communicate to IconGlobal Project Approval and start engagement	August 2	
Plan project meetings	August 8	
Define project resourcing and confirm commitments	August 15	
Confirm Gateways Resourcing for Project for Roles & Teams - Commit Resources	August 1	
Gateways Sharepoint Project Team	August 1	
Gateways Sharepoint Administrator	August 1	
Gateways O365 Administrator	August 1	

Newsfeed

Start a conversation

Joey Lau
Hi everyone,
As discussed, here is the article on the new PST Import tool in Office365.
<https://support.office.com/en-us/article/Overview-of-importing-PST-files-and-SharePoint-data-to-Office-365-aad896c9-06b4-4d07-b6d7-2b69564ea8d4?ui=en-US&rs=en-AU&ad=AU>
September 15 Like Reply

Arun Mandala
Hi Joey & Matt,
we have decided to go along with a hybrid approach.
To make it work, Autodiscover and EWS has to work externally.
Currently, Microsoft Outlook connectivity test was successful with a certificate error.
Please refer to the attached result and guide us through.
Thanks,
Arun Mandala
September 9 Like Reply Follow Arun Mandala

Joey Lau
Hi Arun, The result shows autodiscover works with autodiscover.cpsu.org.au. The earlier results show the autodiscover process, which checks the hostname only first at <https://cpsu.org.au/autodiscover/autodiscover.xml> and then ignores it because the certificate doesn't match the hostname. This is normal behaviour, and autodiscover should be working fine.
September 15 Like Reply

Arun Mandala
Hi Joey,
Thanks for the confirmation.
September 15 Like Reply Follow Arun Mandala

Matt Walton
Welcome to the SharePoint site for the DIY Office 365 workshop-advanced email migration for September 2016. We will be using this site to store all relevant information from the session as well as to discuss any other related topics. Feel free to ask questions using this newsfeed.
September 5 Like Reply

Documents

New Upload Sync Share More

Current View Find a file

Name	Modified	Modified By
CPSU Connectivity test Result	September 9	Arun Mandala
DIY Office365 Advanced Email wk3 2016-09-23	4 days ago	Joey Lau
DIYAdvancedEmail Week 1 080916	September 7	Joey Lau
DIYAdvancedEmail Week 2 150916	September 15	Joey Lau
DIYAdvancedEmail Week 3 220916	4 days ago	Joey Lau

Drag files here to upload

Quicklinks

- Cutover migration instructions
- Microsoft Office 365 for non profits
- DNS check tool
- AADConnect information and guide
- Upload PST files to Office365
- Add new link

Site Users

- Adrian Coulls
- Arun Mandala
- Joey Lau
- Matt Walton
- Add new user



Administration (Lists and forms)

Office 365 | SharePoint

BROWSE PAGE

Infomchange

IX Home IX Teams IX Projects IX Comms IX People IX Social IX AU Web IX NZ Web IX Partner portal

IX Policies, Business Rules, Forms & Procedures

Home

- IX Policies & Procedures
- IX Forms and Templates
- IX Contract Repository
- IX e-Forms - Credit Note
- IX e-Forms - One-Off Invoice Requests
- IX e-Forms - New Starter Form
- IX e-form Flexible Working Arrangement

Recent

- Employment type
- WFH Self Assessment
- site location
- Security Groups
- CostCodes
- Workflow Tasks
- Site Contents
- Recycle Bin

EDIT LINKS

Infomchange Policies, Business Rules & Procedures

New Upload Share

✓	Name	Function	Document Type
	Function : Business Development (2)		
	Function : Facilities (2)		
	Function : Finance (8)		
	Function : Governance (2)		
	Function : HR (12)		
	Function : ICT (4)		
	Function : Office Administration (2)		
	Function : Travel (2)		

Drag files here to upload

Infomchange Forms and Templates

New Upload Share

✓	Name	Function	Document Type
	Function : Digital Inclusion (1)		
	Function : Finance (4)		
	Function : Marketing (2)		
	Function : Office Administration (6)		

Frequently asked Questions

- How do I use my desk phone?
- How do I use my timesheet?
- How do I book a meeting room?
- How do I book a company car?
- How do I book air travel?
- How to claim expenses?
- How to order non IT equipment?

Electronic Forms

- Credit note e-form
- One-Off Invoice
- New Starter Admin Form

Potential admin functions include:

- » New starter form
- » Asset Register
- » IT issues log
- » Leave requests
- » Incident report
- » Maintenance requests
- » Workflows



Admin examples

IX e-Forms - Credit Note

Status

Invoice Number

Company

Date Invoice Raised...

Amount Of Invoice...

Amount to be Credi...

Amo

Status: Approved by CS Manager (2)

Approved by CS Manage 61787

Approved by CS Manage 61811

Status: Awaiting BU Approval (8)

Status: Awaiting CS Approval (19)

Status: Credit Note has been cancelled by BU Manage

Status: Credit note processed by finance (89)

Save Cancel

Staff IT Req... > New item

Ticket ID *

Ticket Title *

Ticket Description *

Current Status *

Progress Comments

Raised Date *

Due Date

Date Invoice Raised...	Amount Of Invoice...	Amount to be Credi...	Amo
16/08/2016	\$25,000.00	\$22,500.00	
17/08/2016	\$3,636.36	\$3,636.36	

Office 365 Sites

Home

IX Policies & Procedures

IX Forms and Templates

IX Contract Repository

IX e-Forms - Credit Note

IX e-Forms - One-Off Invoice Requests

IX e-Forms - New Starter Form

Recent

ICT Requirements

Phone Call Group

Department List

IX Mailing list

CostCodes

Site Contents

Recycle Bin

EDIT LINKS

Infoxchange

New Starter Administration Form

New Starter First Name:

New Starter Surname:

Commencement Date:

Manager's Name:

Job Title:

New starter replacing someone?

Location:

Department:

Cost Centre:

Type of employment:

Additional comments:

Facilities (please select applicable):

SELECT ALL

Alarm Code

Security Pass Number

Telephone Extension

Telephone Port

Telephone on Desk

Take photo of New Starter

Update Active Directory record

Please add to HR system

Please add to your records

Atherton 7850

Collingwood 7840

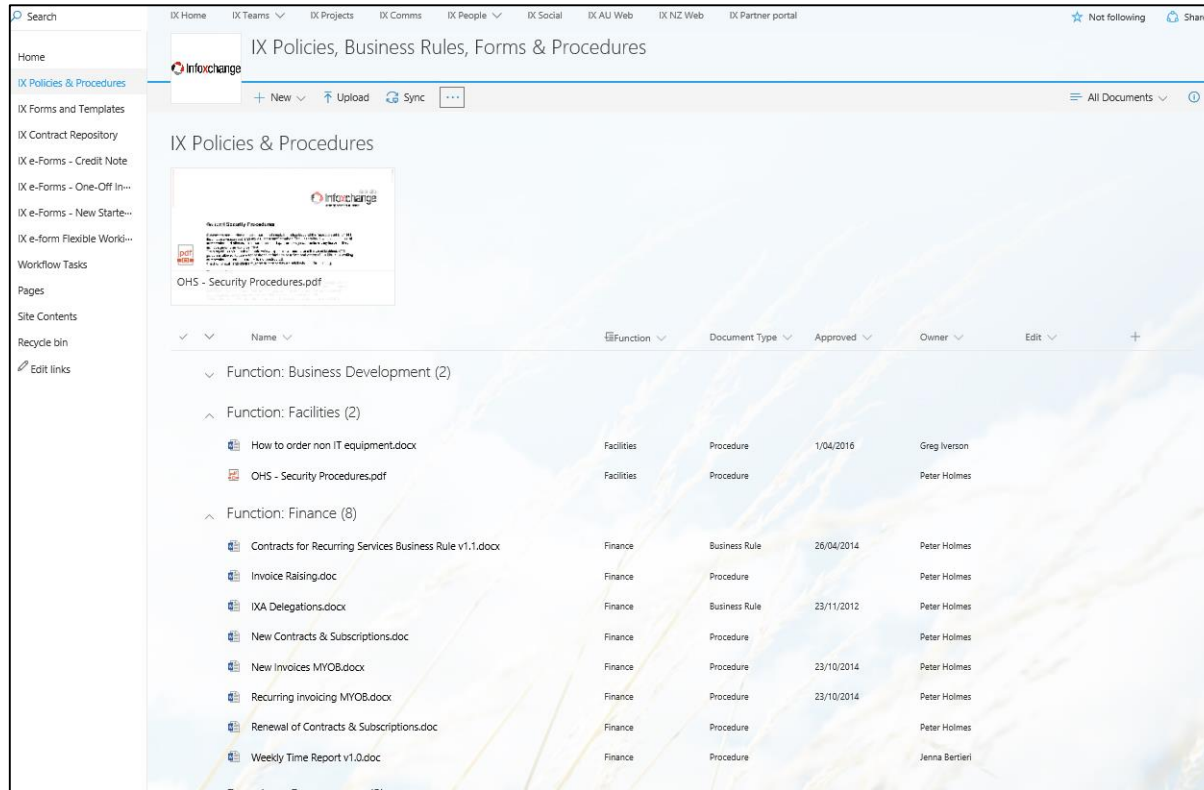
CRM 7422

DISD 7493

Finance 7497



Document management (libraries)



Document library functions include:

- » File server replacement
- » Offline local files
- » Co-authoring
- » Version history
- » Permissions
- » All file types
- » Image galleries
- » Metadata categorisation
- » Approval workflows



Document management (versioning)

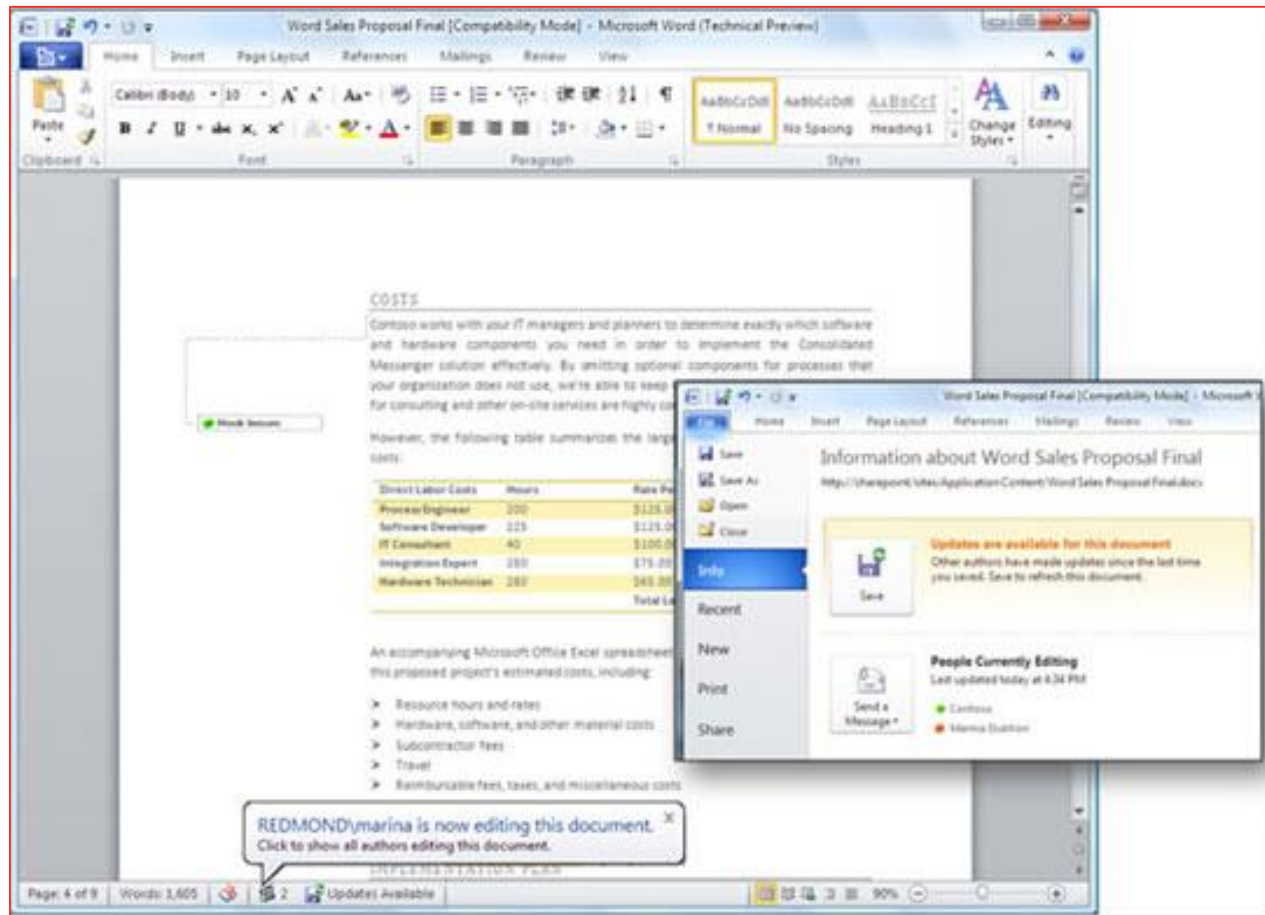
The screenshot displays the Microsoft Office 365 Sites interface. The top navigation bar includes 'Office 365' and 'Sites'. Below it, the 'FILES' tab is active, showing a ribbon with options like 'New Document', 'Upload Document', 'New Folder', 'Edit Document', 'Check Out', 'Check In', 'Discard Check Out', 'View Properties', 'Edit Properties', 'Share', 'Alert Me', 'Popularity Trends', 'Download a Copy', 'Workflows', 'Publish', and 'Tags & Notes'. The left sidebar shows a navigation pane with 'Home', 'Notebook', 'Documents', 'Tasks', 'Calendar', and 'Site Contents'. The main content area shows a document titled 'Invoice 1.docx'. A 'Version History' dialog box is open, displaying a table of document versions.

No. ↓	Modified	Modified By	Size	Comments
2.0	14/02/2015 6:43 PM	☐ Stefanie Kechayas	18.4 KB	
1.0	15/10/2014 3:47 PM	☐ Stefanie Kechayas	18.4 KB	

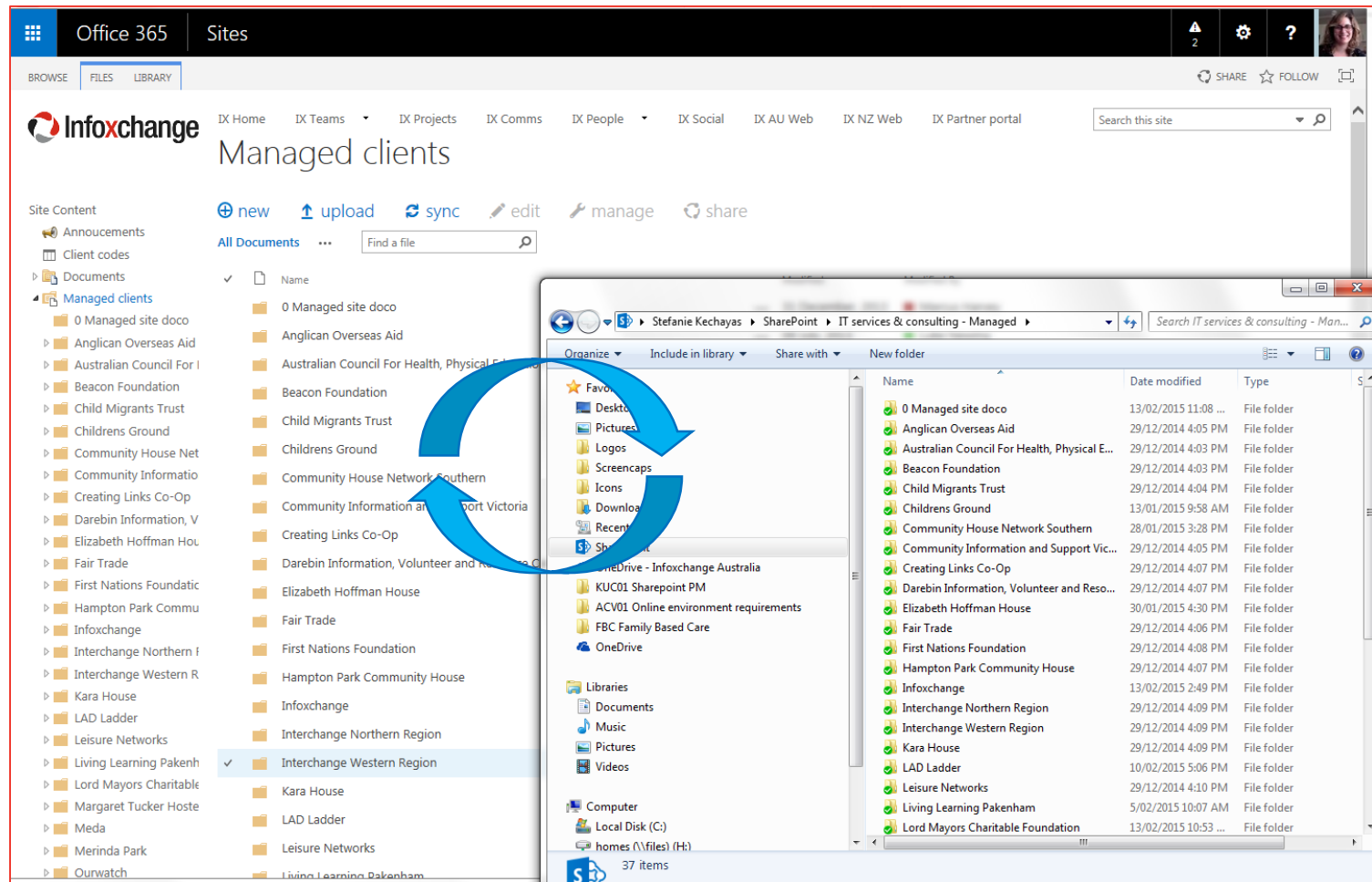
Below the table, the text indicates the document was 'Changed by you on 14/02/2015 6:43 PM' and 'Shared with lots of people'. The URL at the bottom is https://ixa.sharepoint.com/TeamA/_layouts/15/WopiFrame.aspx?



Document management (Co-authoring)



Document management – Offline syncing



File storage – OneDrive & SharePoint

Previously SkyDrive Pro / OneDrive Pro



- 1 TB Per User (free)
- Not Expandable
- Every file is “owned” by a user, not intended for shared files

Also known as “Team Sites”



- 1 TB + 500mb per license (free), expandable (\$)
- Store files, calendars, contacts, and more
- Data is centrally managed, intended for shared files



Files can be taken Offline with OneDrive Desktop Client



SharePoint limitations and challenges

1. SharePoint isn't suitable for every organisation
2. SharePoint is a different user experience than a file server
3. Sync tool can have errors that need to be managed
4. 400 character limit for each file name with other limitations (250 character if syncing)
5. Keep to under 15,000 files per library when syncing
6. 1TB storage per tenant plus .5GB per user
7. Editing pages & sites requires an administrator with training
8. Most users may require training for document management or using lists
9. Migration can be time consuming and not simple
10. Permissions need to be managed carefully



Alternative or complimentary Office 365 applications to SharePoint?

Purpose	Application
Collaboration including document management for small teams	Office 365 Teams/Groups
Discussion and Collaboration	Yammer or Teams
Sharing and booking calendars, resources, rooms and equipment	Exchange Resources
Intranet and document collaboration for staff and/or boards	Office 365 Teams/Groups
Business Intelligence and reporting	Power BI
Storage of individual's documents with some basic sharing functions	One Drive for Business
Online forms	Power Apps / Forms
Project Management	Office 365 Planner
Searching for organisational information	Delve
Storage and online access to videos	Office 365 video
Messaging and video communication	Skype for Business /Teams
Local storage of large files or applications	NAS or server



Strategy: Why do you need or want SharePoint?

- » Is an intranet the **best tool** to solve your problem?
- » Are you **ready**, culturally, for this new way of working and communicating?
- » Are your staff and management supportive of the idea?

You need to be able to clearly articulate:

- » *What is the purpose of SharePoint for your organisation?*
- » *Where does SharePoint sit with all of my other information or systems eg client management, server documents etc?*



Determining requirements and use cases

1. Who will be using the tool? Eg staff and/ or volunteers?
2. What is their key reason for accessing it?
3. Where else do they access information eg server, client management system, website etc?
4. When will they login? Eg during shift or from home?
5. What device will they access information from?
6. What information will they be looking for and do they need to edit or read or download?
7. Who is inputting the content? Eg management or staff
8. Are they comfortable using this type of technology?
9. What would motivate them to use it?
10. What does success look like?



Implementation: How will you do it?

- » Do you have the capability and capacity internally to implement SharePoint?
- » Do you need an external partner to help?
- » Who will manage the Intranet or libraries going forward?
- » Who will review and migrate content?
- » What training will be required?
- » How will we manage the change?



Key implementation stages

Stage 1 : Find a partner and internal champion

Stage 2 : Business Case and approval

Stage 3 : Review and scoping

Stage 4 : Content review and migration planning

Stage 5 : SharePoint design, Information Architecture, site map and permission structure

Stage 6 : SharePoint build –sites, lists, libraries, pages

Stage 7: Administrator and champion training

Stage 8: Pilot and testing

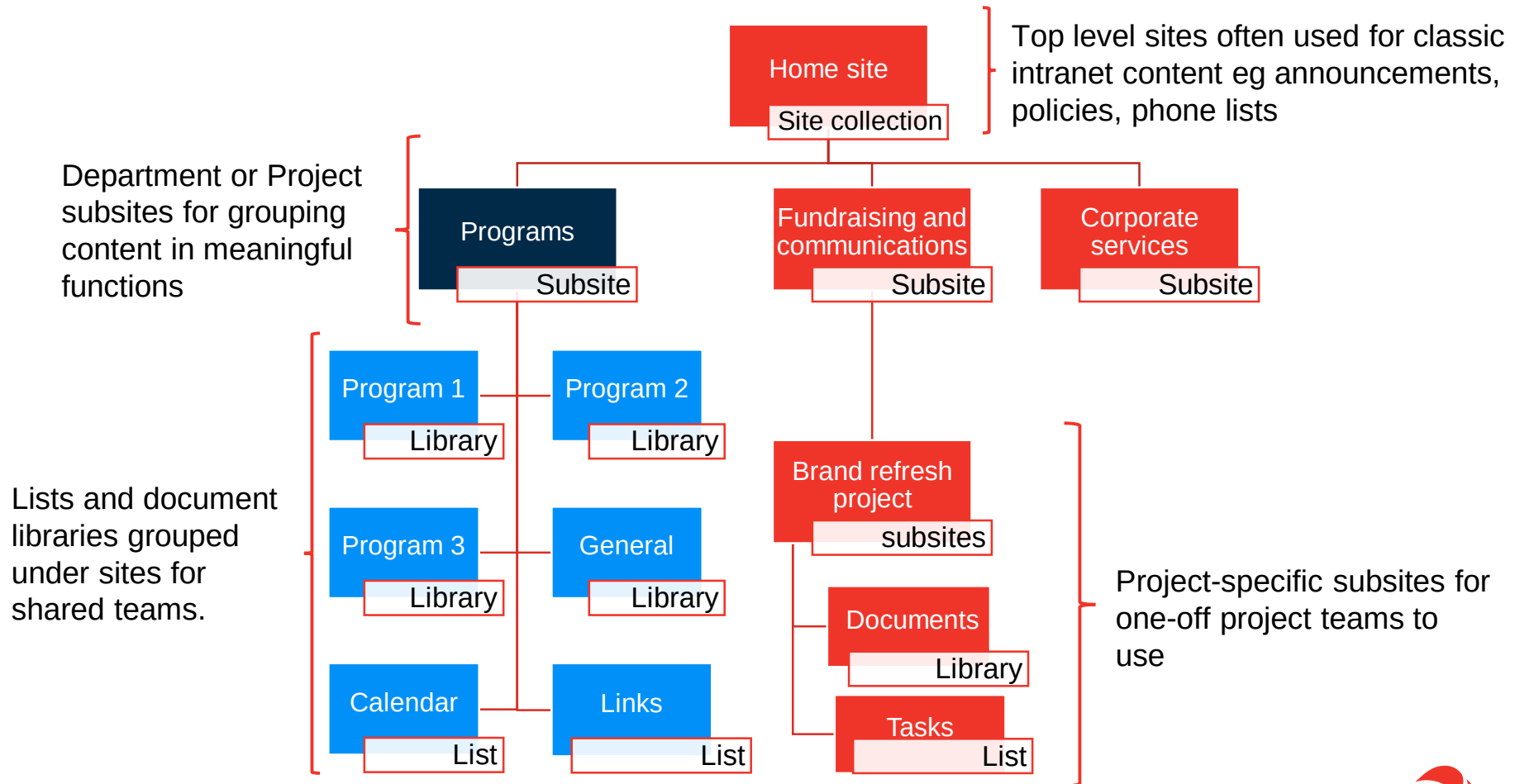
Stage 9: Content migration process

Stage 10: Launch and training

Ongoing evaluation and management



Design: What will your information architecture be?



Governance – what permission and access strategy will you use?

- » Who will decide who can access which documents?
- » Which documents should be restricted? Only lock down what has to be locked down for a good reason (confidentiality)
- » Establish clear lines of responsibility and access for content
- » Think about practicalities and administrative overhead of maintaining rigid silos of information across the business
- » Who will manage the permission changes?



Change Management

1. Engaging management – build a business case
2. Finding champions
3. Pilot group - from across the organisation
4. Create some hype – give it a name?
5. Training / Demo sessions
6. User and help documentation - Help area
7. Staged approach by team/department (if possible)
8. Engage users in content review and/or migration
9. Communication through staff meetings, Intranet, internal communications
10. Regular updates and evaluation



Top tips for successful use of SharePoint

1. Explain the *benefits* to staff & support them to make the change; local 'champions' can help staff to make the most of the new features and training.
2. Use the online portal through a web browser instead of relying heavily of OneDrive Synchronisation tool
3. Use portals for project management or sharing documents, news and tasks with boards
4. Use lists for streamlining administration and collecting information eg incident reports, IT requests
5. Consider metadata (instead of folders) for document categorisation on some libraries eg policies

....continued



Top tips for successful use of SharePoint

6. Use a SharePoint *expert* to make the transition a success (particularly for data migration), and to help with ongoing support and training if required.
7. Consider changing practices as part of this process eg archiving, naming protocols, use of folders, permissions
8. Consider retaining local storage or server for some purposes eg large files, videos, custom applications
9. Compliment SharePoint with other applications including Yammer, OneDrive, Teams, CRM etc
10. Ensure each function that you implement has a clear purpose and it adds value to your staff and organisation



Additional Office 365 support available

- » Office 365 readiness assessments
offered in partnership with Connecting Up & TechSoup
 - AU - <http://www.connectingup.org/office365>
 - NZ - <https://www.techsoup.net.nz/office365>
- » Office 365 DIY workshops -
<http://www.connectingup.org/sphinxsearch/DIY%20workshop>. Basic email, Basic SharePoint, Advanced email
- » Additional ConnectingUp webinars
- » Implementation services and migration advice
- » SharePoint configuration and development
- » Office 365 for non-profits Microsoft site:
www.microsoft.com/office365nonprofits

Contact: mwalton@Infoxchange.org or (03) 9418 7432



THANK YOU

PLEASE GET IN TOUCH



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