# Revision History

<table>
<thead>
<tr>
<th>Version</th>
<th>Author</th>
<th>Date</th>
<th>Revision Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>Danelle Kent</td>
<td>6/10/13</td>
<td>Initial Version</td>
</tr>
<tr>
<td>1.1</td>
<td>Stefan Maisnier</td>
<td>12/1/15</td>
<td>Removed External Users</td>
</tr>
<tr>
<td>1.2</td>
<td>Stefan Maisnier</td>
<td>3/1/16</td>
<td>Removed External Users</td>
</tr>
</tbody>
</table>
# Table of Contents

## REVISION HISTORY

1. PLAN SHAREPOINT CONTENT
   1.1. REQUIRE NEW SITE COLLECTION
   1.2. CREATING SITE ARCHITECTURE
2. SETUP SITE NAVIGATION
   2.1. OVERVIEW
   2.2. SETUP TOP NAVIGATION MENU
   2.3. SETUP LEFT NAVIGATION MENU
3. SETUP USER PERMISSIONS AND ROLES
   3.1. SETUP INTERNAL/NORTHWESTERN USERS
4. CREATE NEW PERMISSIONS GROUPS
   4.1. CREATE A NEW PERMISSION GROUP
5. CONFIGURE DOCUMENT LIBRARY SETTINGS
   5.1. LIBRARY SETTINGS
   5.2. WORK WITH SHAREPOINT DOCUMENTS WITH OFFICE FOR WINDOWS
   5.3. WORK WITH SHAREPOINT DOCUMENTS USING MICROSOFT DOCUMENT CONNECTION FOR OSX
6. MANAGE ACCESS REQUESTS
   6.1. SET UP ACCESS REQUESTS
   6.2. APPROVE OR DECLINE ACCESS REQUESTS FOR A SITE
7. ONGOING CONSIDERATIONS
   7.1. SITE LIFECYCLE AND RETIREMENT
   7.2. STORAGE LIMITS
   7.3. SEARCH
1. Plan SharePoint Content

SharePoint offers different areas for collaboration, such as a Site Collection, Subsite, or Library/Lists.

The general definition of these areas is described below.

<table>
<thead>
<tr>
<th>Type</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site Collection</td>
<td>Site collections can be created for schools (by campus), departments, projects, programs, teams, centers, and institutes and are then administered locally by a designated site owner from that area (usually local technology support staff). Unique security must be configured within the SharePoint site collection.</td>
</tr>
<tr>
<td>Subsite</td>
<td>A complete website created under a site collection that can have the same permissions/security as parent site or can be configured with unique permissions.</td>
</tr>
<tr>
<td>Document Library</td>
<td>Site repository for documents and folders that can have the same permissions/security as parent site or can be configured with unique permissions.</td>
</tr>
</tbody>
</table>

Site Collections have quotas or storage limits depending on site type. Any subsites or document libraries are included in the total quota for the parent site collection. When more space is required, a separate site collection may be needed.

<table>
<thead>
<tr>
<th>Site Type</th>
<th>Quota Limit</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>University / College</td>
<td>10 GB</td>
<td>Weinberg, Kellogg, etc.</td>
</tr>
<tr>
<td>Department / Center / Institute</td>
<td>50 GB</td>
<td>Administration, Enrollment, etc.</td>
</tr>
<tr>
<td>Project / Program / Team</td>
<td>10 GB</td>
<td>Research Projects, Committees, etc.</td>
</tr>
</tbody>
</table>

1.1. Require New Site Collection

The following diagram is a high level decision tree, which points out specific areas of consideration for deciding site type, before site creation.
1.2. Creating Site Architecture

Site owners should consider the type of content for the website before building the site. When planning out the website, it is also important to consider security.

Some examples of content area include:

- Document Library
- Wiki Library
- Announcements List
- Calendar List
- Links List
- Task List

When different security is required, consider creating a new, or separate site collection, site, or library/list. Refer to Sections 3 and 4 for more details on Permissions.

2. Setup Site Navigation

2.1. Overview

There are two areas on each site where navigation can be configured. The Global Navigation, which is located across the top of a page, and the Current Navigation, which is located down the left side of a page.

Site owners use structured navigation to setup and manage both Global Navigation and Current Navigation. This is both easy and intuitive.

The following sections detail how to create and edit navigation nodes for both the top or Global Navigation and the left or Current Navigation.
2.2. Setup Top Navigation Menu

Top navigation is known as Global Navigation for SharePoint Sites. This navigation tends to change from site collection to site collection, as it is the easiest way to customize the navigation based on the content of the site collection. The following steps outline how to set up headers and subheaders/links.

1. Located in the top right corner of the page, **click the gear** and **select Site settings**

2. Under the Look and Feel menu, **select Navigation**
3. Under Global Navigation, select Structural Navigation: Display the navigation items below the current site
   
a. Uncheck Show subsites

b. Uncheck Show pages

4. Scroll down to the second half of the screen


6. Select Add Heading
7. Under Title **enter the header title** and **Select OK**  
(URLs are not required for headings)

![Navigation Heading](image)

8. Under Structural Navigation: Editing and Sorting, **select the header** you want the link to fall under

![Structural Navigation: Editing and Sorting](image)

9. **Select Add Link**

![Structural Navigation: Editing and Sorting](image)
10. In the Title field enter the link title

![Navigation Link screenshot](Image)

11. To add a link connecting to an existing site page, select Browse (If you know the URL, you can type it in the URL field)

![Navigation Link screenshot](Image)
12. In the Select an Asset modal:
   a. On the left side, **select the desired area** (i.e. – Pages)
   b. On the right side, **select the desired item to link to**
   c. **Select Insert**

![Select an Asset modal](image)

13. **Select OK**

Repeat above steps for each header and link until top navigation is complete.

Global navigation can also be edited under Structural Navigation: Editing and Sorting. To take any action on a navigation node, select the node and one of the following buttons.

- **Edit** allows users to edit title and information related to the navigation node
- **Delete** deletes the navigation node and all related information
- **Move Up/Move Down** allows users to move the sorting order of links and headers
2.3. Setup Left Navigation Menu

The left navigation panel is known as Current Navigation for SharePoint sites. This navigation tends to change from site to site, as it is the easiest way to customize the navigation based on the content of the site. The steps are similar to those for setting up top/Global Navigation.

1. Located in the top right corner of the page, **click the gear** and **select Site settings**

2. Under the Look and Feel menu, **select Navigation**
3. Under Current Navigation, select Structural Navigation: Display the navigation items below the current site
   a. Uncheck Show subsites
   b. Uncheck Show pages

4. Scroll down to the second half of the screen

6. **Select Add Heading**

7. **Under Title enter the header title and select OK** (URLs are not required for headings)

8. **Under Structural Navigation: Editing and Sorting, select the header** you want the link to fall under
9. **Select Add Link**

![Structural Navigation: Editing and Sorting](image)

10. Under Title **enter the Link’s title**

![Navigation Link](image)

11. To add a link to an existing site page, **select Browse...**
12. In the Select an Asset modal:
   
a. On the left side, **select the desired area** (i.e. – Pages)

   b. On the right side, **select the desired item to link to**

   c. **Select Insert**

   ![Select an Asset modal](image)

13. **Select OK**

   Repeat steps above for each header and link until left navigation is complete.

   Current navigation can also be edited under Structural Navigation: Editing and Sorting. To take any action on a navigation node, select the node and one of the following buttons.

   - **Edit** allows users to edit title and information related to the navigation node
   - **Delete** deletes the navigation node and all related information
   - **Move Up/Move Down** allows users to move the sorting order of links and headers

   ![Navigation Editing Buttons](image)
3. Setup User Permissions and Roles

User permissions are granted via NetID or Security Enabled Distribution Group, and assigned at the site level. Assigned roles determine the rights a user is given to a particular site. For example, a user assigned the role of Member will have the ability to add, edit, or delete content on a site. The table below outlines the six default roles each site will have.

<table>
<thead>
<tr>
<th>Role Type</th>
<th>Rights &amp; Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visitors</td>
<td>Read – view content</td>
</tr>
<tr>
<td>Members</td>
<td>Contribute – manage content</td>
</tr>
<tr>
<td>Approvers</td>
<td>Approve – approve changes to content</td>
</tr>
<tr>
<td>Designers</td>
<td>Design – edit pages and configuration</td>
</tr>
<tr>
<td>Owners</td>
<td>Full Control – admin configuration &amp; setup</td>
</tr>
<tr>
<td>Site Collection Administrator</td>
<td>Administrator for the entire site</td>
</tr>
</tbody>
</table>

This section will walk you through the steps to follow to setup new users with the appropriate permissions.

3.1. Setup Internal/Northwestern Users

Any existing Active Directory distribution list or group can be given access to a site. Best practice suggests you manage users through Active Directory distribution list or group rather than add Northwestern users as individuals to the site. It is simpler to manage users in one place, i.e. Active Directory. As groups are updated in Active Directory, the changes are reflected in SharePoint automatically. Distribution lists can be managed and maintained for other access points as well.

Follow these steps to add an internal/Northwestern user:

1. Located in the top right corner of the page, **click the gear** and **select Site settings**
2. Under the Users and Permissions menu, select **People and groups**

3. In the left navigation panel, select **Groups**

4. **Select the Group you want to add users to** based on the desired permissions i.e. Law School Owners - Owners have full control permissions to the site
5. **Select New** and **select Add Users to this Group**

6. **Enter Active Directory group or distribution list name** into the first box
   The text will search based on the characters you begin typing

7. **Select the full name in the list that appears**
   Repeat to add another Active Directory group

8. **Select Share**
4. Create New Permissions Groups

When a new site is created for you by NIIT, a set of default permission groups will automatically be created. In certain instances, it may be necessary to create new permission groups beyond the default groups provided for the SharePoint site.

**Scenario**: You are the site owner for the Law School Communications department. When the site is first created, it will already have permission groups set up for you. A new Student Advisory Group has been formed and they need access to only one library in the Law School Communications site. You can create a permission group that allows for only this specific access.

When creating a new permission group there are certain naming conventions to follow.

**[Area Level 1] [Area Level 2] [Role Type]**

For example: the Law School Communications department site would be created with the following groups using this naming convention:

**[Area Level 1] [Area Level 2] [Role Type]**

**[Law School] [Communications] [Visitors]**

<table>
<thead>
<tr>
<th>Role Type</th>
<th>Example SharePoint Group Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visitors</td>
<td>Law School Communications Visitors</td>
</tr>
<tr>
<td>Members</td>
<td>Law School Communications Members</td>
</tr>
<tr>
<td>Approvers</td>
<td>Law School Communications Approvers</td>
</tr>
<tr>
<td>Designers</td>
<td>Law School Communications Designers</td>
</tr>
<tr>
<td>Owners</td>
<td>Law School Communications Owners</td>
</tr>
<tr>
<td>Site Collection Administrator</td>
<td>n/a</td>
</tr>
</tbody>
</table>
In the scenario above, there is a team that only needs access to a particular library within the Law School Communications site. In this case, we add a category to the naming convention.

[Area Level 1] [Area Level 2] [Category] [Role Type]

For example:
[Area Level 1] [Area Level 2] [Category] [Role Type]
[Law School] [Communications][Student Advisory Group] [Members]

Table 2 shows what the different groups might be for this example.

Table 2

<table>
<thead>
<tr>
<th>Role Type</th>
<th>Example SharePoint Group Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visitors</td>
<td>Law School Student Advisory Group Visitors</td>
</tr>
<tr>
<td>Members</td>
<td>Law School Student Advisory Group Members</td>
</tr>
<tr>
<td>Approvers</td>
<td>Law School Student Advisory Group Approvers</td>
</tr>
<tr>
<td>Designers</td>
<td>Law School Student Advisory Group Designers</td>
</tr>
<tr>
<td>Owners</td>
<td>Law School Student Advisory Group Owners</td>
</tr>
<tr>
<td>Site Collection Administrator</td>
<td>n/a</td>
</tr>
</tbody>
</table>

4.1. Create a New Permission Group

When a group only needs access to a portion of a site, you can create a new permission group. Follow these steps:

1. Located in the top right corner of the page, **click the gear** and **select Site settings**
2. Under the Users and Permissions menu, **select People and groups**

![Image of Users and Permissions menu with People and groups highlighted]

3. In the left navigation panel, **select Groups**

![Image of Groups menu with various options]

4. **Select New** and **select New Group** Create a new SharePoint group

![Image of creating a new group]

5. **Fill in the Group Fields**

   a. **Name** Should follow naming convention Table 2

   b. **Owner** Should be a group not an individual in the case that an individual leaves the university the ownership is not lost (Recommendation is to use the site owners group; i.e. “Law School Communications Owners”)

   c. **Group Settings** Determines who can view and edit membership of the group

   d. **Membership Requests** Allows for open membership or based on acceptance; memberships can be accepted automatically or based on acceptance via email

   e. **Give Group Permission to this Site** Leave this section blank, permissions will be granted in portions of the sit

   **NOTE:** By default the creator of the permission group is added to the group.

   ![Group Fields Diagram]

6. **Select Create**
5. Configure Document Library Settings

SharePoint sites come with a default document library named Shared Documents. Other libraries may be added to sites based on the needs of the team using the site. As a site owner, you may be asked to configure the library settings. The following section describes the steps to configure document library settings.

5.1. Library Settings

1. Located in the top right corner of the page, click the gear and select Site settings

2. Select the Created Library (for this example, LawSchoolSAG)

3. At the top of the screen, select Library
Towards the right of the ribbon, select Library Settings

There are 4 areas that are commonly updated when configuring a document library.

1. List name, description and navigation
   - Update name of library
     (for example: LawSchoolISAG becomes Law School Student Advisory Group)
   - Add a description for the library
   - Add library to Quick Launch/Left Navigation
     - Selecting Yes creates a library heading and adds a link to this library
2. Versioning settings
   - Content Approval
     - Selecting Yes requires the document to be approved, per site workflow, before the document is published (it will remain in a pending state until approved)
   - Document Version History
     - Major – every save will create a new major version
     - Major and Minor – minor versions are removed once a major version is published
     - To manage storage space, the number of versions can be limited; chose the number of each type of version to be stored and avoid unlimited versioning
   - Draft Item Security
     - Allows you to control who can see minor versions which are not yet approved
   - Require Check Out
     - Ensures only one person is editing a document at a time, minimizing editing conflicts and confusion
     - May help remind team members to add comments when checking files back in, allowing for easier tracking of what has changed from version to version

3. Advanced settings
   - Content Types
     - Allows for the classification of documents within your library, there is a default scheme of content types available for general Northwestern usage
   - Document Template
     - This feature can be used only if content types are disabled, and it will let you specify a template to be used by default when creating new documents
   - Open Documents in the Browser
     - Allows you to control if documents are opened in the browser or client application by default
     - The recommendation is to leave the other options with default settings

4. Permissions for this document library
   - This will allow for the management of user permissions assigned to the library, the default configuration is to inherit permissions from the site permissions
   - If the library is only for a certain group of people, break the inheritance to the top level site permissions (This will create unique permissions to the parent site) refer to Section 3 for more details
5.2. Work with SharePoint Documents with Office for Windows

The following Applications give users access to SharePoint documents and lists from the desktop and enables real-time synchronization of content on the desktop with that in SharePoint. When you are connected to the SharePoint server, all content updates on the server and in the workspace are automatically synchronized. When you are not connected, changes you make in the workspace are cached locally. The next time you connect to the SharePoint server, all changes are automatically synchronized.

**Office 2013 - SkyDrive Pro**

**Office 2010 - SharePoint Workspace 2010**

5.3. Work with SharePoint Documents Using Microsoft Document Connection for OSX

Microsoft Document Connection for Mac OS enables you to easily work with documents stored in a SharePoint site. Windows SkyDrive Pro (Windows 8) or SharePoint Workspace (Windows 7) enables you to share and work on SharePoint document libraries or lists. These provide real-time automatic synchronization from SharePoint to the desktop. Microsoft Document Connection provides similar functionality for Mac OS.

Connect to a SharePoint site using Microsoft Document Connection (Microsoft Office must be installed on the Mac computer)

1. Open Finder on a Mac computer and search for “Microsoft Document Connection”. Open Microsoft Document Connection
2. Click on Add Location and select Connect to a SharePoint Site…

3. **Type in the URL** to the site collection you would like to access and **click Connect**

4. Type in your NetID and password and **click connect**
6. Manage Access Requests

Every now and then, a SharePoint user will click on something and they will not have access. They will either get an Access Denied message or you can configure your site so they can request access. This is the recommended solution to streamline access requests.

6.1. Set Up Access Requests

Site owners can set up the access request feature so it sends them an email when someone requests access to a site.

1. Located in the top right corner of the page, **click the gear** and **select Site settings**

2. Under Users and Permissions, **click Site permissions**

3. On the Permissions tab, **click Access Request Settings**

4. **Select the check box** next to Allow access requests
5. Type the email address for the person responsible for approving access requests

![Access Requests Settings](image)

6. Click OK

6.2. Approve or Decline Access Requests for a Site

1. Located in the top right corner of the page, click the gear and select Site settings

![Site settings](image)

2. Under Users and Permissions, click Access requests and invitations

![Access requests and invitations](image)

3. Under Pending Requests, find the request you want to update, click the ellipses (…)

![Access Requests](image)
Under Permissions, **select the permission level** you’d like to assign the user

4. **Click Approve**

Tip: To view past requests, **click Show History**
7. Ongoing Considerations

The following sections focus on considerations for the health of the SharePoint site as a whole, including site lifecycle and retirement and storage limits.

7.1. Site Lifecycle and Retirement

If sites are no longer being used, it is recommended to retire the site so as to free up storage space for future sites.

It is a good idea to set a schedule for reviewing sites and their content (at least once a year) to examine if the site is still viable and worth the storage space.

7.2. Storage Limits

Each SharePoint site is assigned a quota or storage limit depending on the site type. Northwestern University has 3 main site types with corresponding storage limits.

<table>
<thead>
<tr>
<th>Site Type</th>
<th>Quota Limit</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>University / College</td>
<td>10 GB</td>
<td>Weinberg, Kellogg, etc.</td>
</tr>
<tr>
<td>Department / Center / Institute</td>
<td>50 GB</td>
<td>Administration, Enrollment, etc.</td>
</tr>
<tr>
<td>Project / Program / Team</td>
<td>10 GB</td>
<td>Research Projects, Committees, etc.</td>
</tr>
</tbody>
</table>

There is also a 50 MB limit on the size of a single document that can be uploaded into a document library.

7.3. Search

Users can only search for content that they have permissions to view. Additionally, as a site owner you can change the site settings to exclude your site from search results.