Northwestern University Information Technology (NUIT) is partnering with schools and departments to deliver the final phase of the Collaboration Services initiative – SharePoint 2013. This checklist outlines the SharePoint roles and responsibilities of both NUIT and local school and/or department site owners.

Roles & Responsibilities Checklist

**Northwestern University Information Technology (NUIT)**
- Maintaining University scope of SharePoint 2013 infrastructure & environment
- Managing SharePoint site collections and site quotas
- General, non-site specific SharePoint Tier 1 technical support
- Establishing University SharePoint community
- Providing site owner and user SharePoint training resources
- Providing SharePoint updates and news at [it.northwestern.edu](http://it.northwestern.edu)

**Local Schools and Departments**
- Designating an accountable site owner (eg. local technology support staff)
- Reading and understanding the SharePoint Governance document
- Following University Appropriate Use of Electronic Resources Policy and other applicable guidelines found at [it.northwestern.edu/policies/](http://it.northwestern.edu/policies/)
- Arranging to train site owners, administrators, support staff, and end users
- Designing and organizing site(s)
- Creating and managing site workflows and user permissions
- Communicating site goals and benefits to end users
- Answering site-specific SharePoint technical support questions
- Creating sites within the site collection as requested by local staff and faculty
- Participating in the University SharePoint community to share information
- Regularly monitoring [share.northwestern.edu](http://share.northwestern.edu) and [it.northwestern.edu](http://it.northwestern.edu) for University-wide SharePoint updates

Training Checklist for Site Owners

1. **Attend SharePoint 2013 for Site Collection & Site Administration Training**
   a. Site owners are strongly encouraged to attend this course in Schaumburg or Chicago. Search for “M55033” at [www.globalknowledge.com](http://www.globalknowledge.com) to register.
   b. Schools and departments may sign up together to train with Global Knowledge or another vendor to share best practices and learn collectively.
2. **Online Video Tutorials (Lynda.com)**
   a. Should be used by site owners as a supplement to classroom training.
   b. Primary training for staff using SharePoint, but who will not be site owners.
   c. Recommended for new or experienced users to view anytime and anywhere.

3. **Train-the-Trainer Classes**
   a. Site owners and administrators should set up internal “train-the-trainer” style classes to teach their site(s) to local support staff, sharing lessons from Global Knowledge along with any specialized workflows or best practices.
   b. Promote site owner and user resources available online, including the SharePoint online video tutorials and the Northwestern Share user guide.

4. **Advance User Demos**
   a. Recommended to show end users how to best use new SharePoint site(s).
   b. Gain user buy-in with faculty and staff in advance of launch.
   c. Schedule 1-2 weeks before launch to try and ensure users retain lessons.

5. **Classroom User Training**
   a. Set up a week or two after launch as a secondary training opportunity.
   b. Should be lead either by local technical support staff or a site owner.
   c. Should include live training in the local Northwestern Share site(s)
   d. May or may not be necessary based on the complexity of your site(s).

6. **Promote Online User Resources to Faculty & Staff**
   a. Lynda.com online video tutorials.
   b. Northwestern online Share user guide.

**Launch Best Practices**

1. **Communicate, Communicate, Communicate**
   a. 2-4 weeks before launch, begin informing faculty, staff, and students.
   b. Use different communication methods such as email, departmental or school newsletters, and even conversation to publicize the new site(s) and features.
   c. Email demo/training reminders 2 days before events for better attendance.

2. **Announce Technical Support**
   a. Create local process(es) in your school or department to provide support to faculty, staff, and students using your SharePoint site(s).
   b. Communicate the process(es) in all training, demos, and communication.

3. **Moving Forward**
   a. Encourage all support staff to participate in the SharePoint listserv.
   b. Regularly communicate new features to faculty and staff as developed.
   c. Promote SharePoint 2013 success stories to keep site(s) participation high.