



*Enhancing community  
sector service delivery*

# SharePoint

## Connect and empower your organisation

Stefanie Kechayas – Senior Consultant  
17 February 2016

# Today

1. What is SharePoint?
2. Why use SharePoint?
  - a. Some examples
3. Alternatives/complimentary systems
4. Best practice and important things to remember

**“Infoxchange is leading the way in providing technology to the not-for-profit sector and creating a more digitally inclusive society”**

## What is SharePoint?

# SharePoint is the system that organisations use to build secure internal websites – **intranets.**

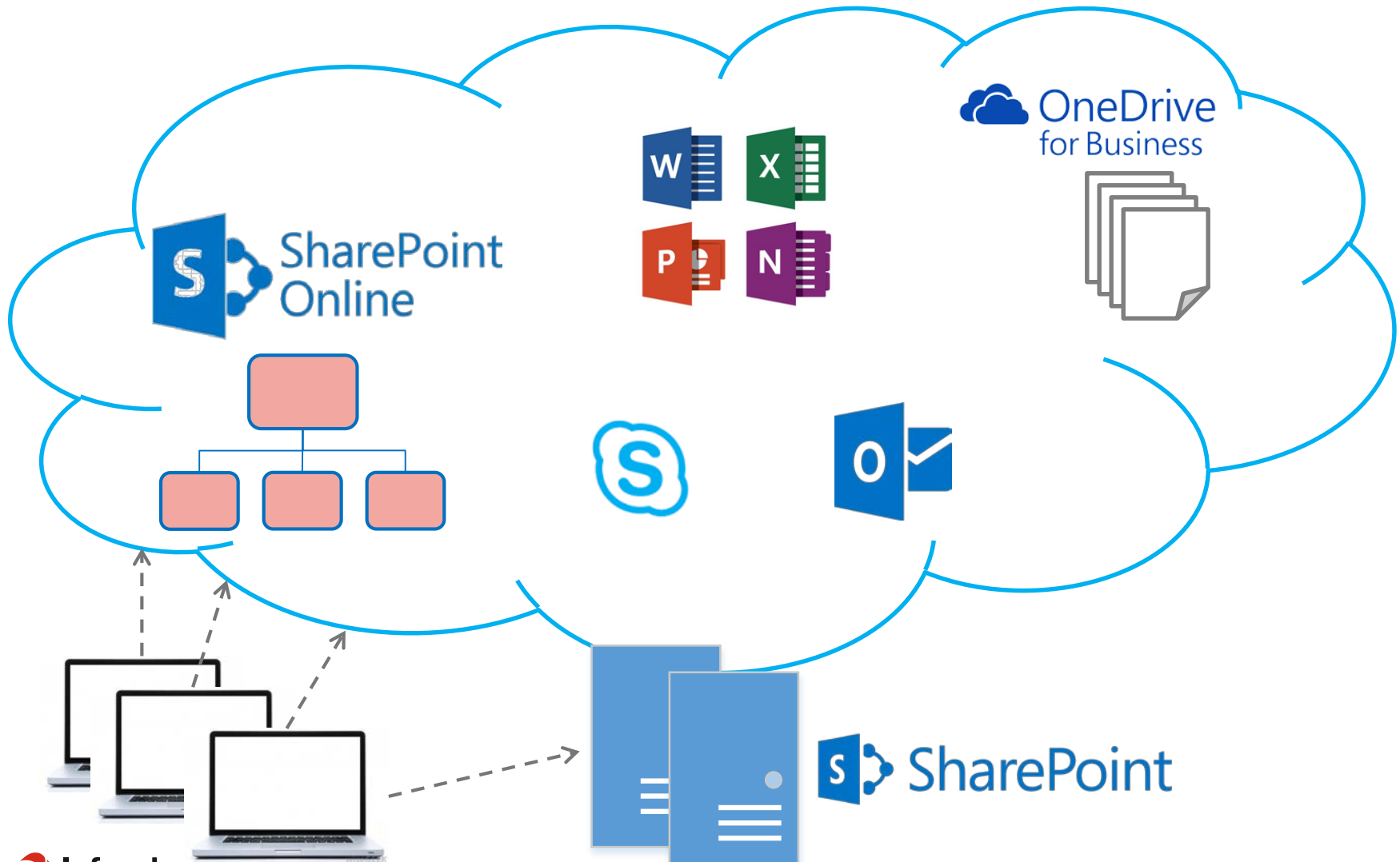
Once used by big organisations as their intranet platform or content management system (CMS), and it was a server (on premises) product.

Now it's available online as part of the Office 365 suite.

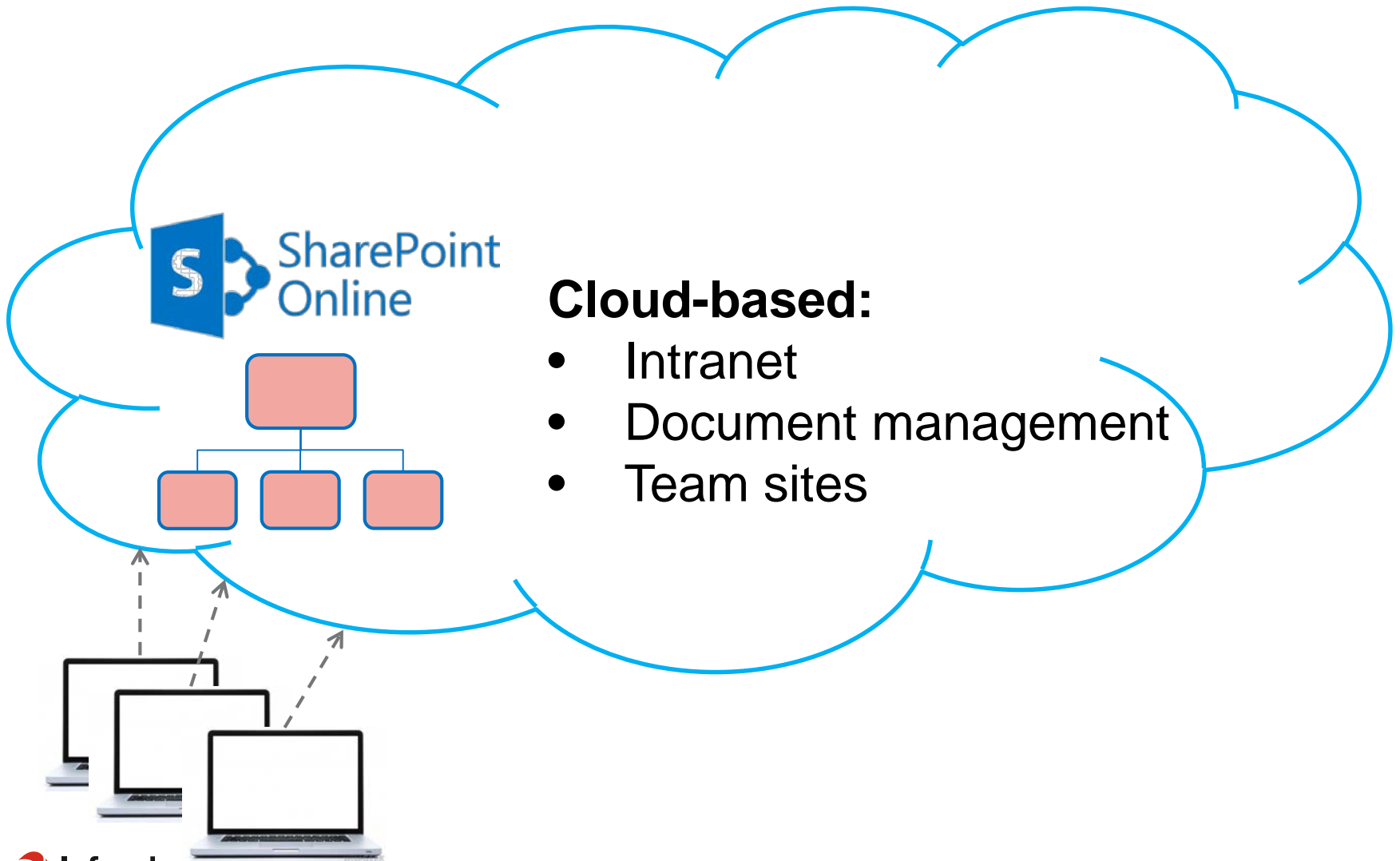
- You need an Office 365 subscription to access SharePoint Online sites.
- Accessed via a web browser, such as Internet Explorer, Chrome or Firefox.

You can use it as a secure place to store, organise, share, and access information from almost any device.

# Office 365



# Office 365



**“Infoxchange is leading the way in providing technology to the not-for-profit sector and creating a more digitally inclusive society”**

## Why use SharePoint?

# SharePoint does...

**Intranet** – Serves as the platform for organisation's internal homepage, a central hub of useful information and communication for businesses.

**Document management** – Provides sophisticated document libraries for storing and working on documents.

**Team sites** – Supports teams working on projects together by providing a centralised spot for tasks, calendars, documents, links and other useful tools.



# Intranet

The screenshot shows a Creative Sharepoint Intranet interface. The browser address bar displays <http://intranet.etui.com/>. The top navigation bar includes links for Newsfeed, SkyDrive, Sites, and a user profile for Chris Clark. The main content area is titled "Home" and features a welcome message: "Welcome to the Company Intranet!". Below this, there is a "News & Announcements" section with two entries: "Scheduled Downtime: CRM" dated 28/02/2013 and "Latest Blog: The Winning Strategy in a Challenging Economy" dated 25/02/2013. To the right, the "Other Applications" section displays three tiles for CRM, Finance, and Project Management. At the bottom left, the "Company Events" section shows a calendar for February 2013, highlighting a "Team Night" event on Tuesday, February 29th, and "CRM Training" on Friday, February 1st. On the bottom right, the "Staff Directory" section lists three employees from the Finance department: Eloise Gibbons, Scott Harris, and Sebastian Lambert, along with their business phone numbers and email addresses.

Home

Finance

HR

Sales & Marketing

Blog

EDIT LINKS

Home

Important Documents

Policies & Procedures

Training & Handbooks

EDIT LINKS

Welcome to the Company Intranet!

News & Announcements

Date

Body

28/02/2013

Scheduled Downtime: CRM

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Integer suscipit mollis neque, in adipiscing felis malesuada a. Nulla ante velit, tincidunt quis elementum eget, fermentum venenatis massa. [Read more...](#)

25/02/2013

Latest Blog: The Winning Strategy in a Challenging Economy

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Integer suscipit mollis neque, in adipiscing felis malesuada a. Nulla ante velit, tincidunt quis elementum eget, fermentum venenatis massa. [Read more...](#)

Other Applications

CRM

Finance

Project Management

Company Events

February 2013

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	SUNDAY
28	29	30	31	1	2	3
	17:00 - 21:00 Team Night		CRM Training			

Staff Directory

First Name	Last Name	Business Phone	Email Address
Department : Finance (3)			
Eloise	Gibbons	715-569-4841	<a href="mailto:e.gibbons@etui.com">e.gibbons@etui.com</a>
Scott	Harris	757-872-7424	<a href="mailto:s.harris@etui.com">s.harris@etui.com</a>
Sebastian	Lambert	212-708-6143	<a href="mailto:s.lambert@etui.com">s.lambert@etui.com</a>

# Intranet

Office 365

Sites

SHARE FOLLOW EDIT

Search this site

Organisation

Demo intranet

Team A's site HR site Finance Program Delivery EDIT LINKS

Home

Announcements

Policies and templates

Events

Resource booking

Staff directory

Subsites


Finance

Team A

HR

Program Delivery

EDIT LINKS



Announcements


Title	Modified	Created By
<a href="#">Lunch today at the kitchen</a>	2/09/2014 6:09 PM	<input type="checkbox"/> Stefanie Kechayas
<a href="#">Check wifi password is correct</a>	2/09/2014 6:09 PM	<input type="checkbox"/> Stefanie Kechayas
<a href="#">Add new announcement</a>		

Upcoming events

There are currently no upcoming events. To add a new event, click "Add new event".

[Add new event](#)

CEO Message



CEO updates

Title	Modified
<a href="#">Corporate photoshoot - tomorrow</a>	6/07/2015 4:21 PM
<a href="#">Annual report released today</a>	2/09/2014 6:09 PM
<a href="#">Add new announcement</a>	

Links

- [Our website](#)
- [Dept. Human Services \(Federal\)](#)
- [Add new link](#)

# Intranet

**SMB** HR Home

SP Suite Employee Services Employee Directory Blog CRM Finance **HR** IT Projects

SEARCH this site

**HR Department Portal**

**HR Department News**

- Vacation Scheduling for all staff
- Executive Staff Meeting
- Health Insurance Plans available for review

**New Service Requests**

	Edit	ID	Title	Status	Due Date	Priority	Requester	Request Type
		10	Onboarding - Charles Smith <small>new</small>	Unassigned	1/29/2013	(2) Normal	Linda Hatch	Onboarding
		9	Performance review request	Unassigned		(2) Normal	Darrell Trimble	Request

**HR Human Resources**

**Department Goals**

- Service Satisfaction Level - 5
- Processed Reports - 50

<https://ipmarketplace.sharepoint.com/sites/Home/Intra/HR>

# Intranet - forms

Office 365 Sites

EDIT

Save Close Paste Copy Cut Current View: Edit Item

Commit Clipboard Views

Home

- DX Policies & Procedures
- DX Forms and Templates
- DX Contract Repository
- DX e-Forms - Credit Note
- DX e-Forms - One-Off Invoice Requests
- DX e-Forms - New Starter Form

Recent

- ICT Requirements
- Phone Call Group
- Department List
- DX Mailing list
- CostCodes

Site Contents

Recycle Bin

EDIT LINKS

**Infoboxchange**

## New Starter Administration Form

New Starter First Name:  New Starter Surname:

Commencement Date:  Manager's Name:

Job Title:

New starter replacing someone? ☐ YES ☐ NO ☐ Don't know Location:

Department:  Cost Centre:

Type of employment: ☐ EMPLOYEE ☐ CONTRACTOR ☐ VOLUNTEER

Additional comments:

**Facilities (please select applicable):**

<input type="checkbox"/> SELECT ALL	
<input type="checkbox"/> Alarm Code	Please add to HR system
<input type="checkbox"/> Security Pass Number	Please add to your records
<input type="checkbox"/> Telephone Extension	
<input type="checkbox"/> Telephone Port	
<input type="checkbox"/> Telephone on Desk	
<input type="checkbox"/> Take photo of New Starter	
<input type="checkbox"/> Update Active Directory record	
	<input type="checkbox"/> Atherton 7850
	<input type="checkbox"/> Collingwood 7840
	<input type="checkbox"/> CRM 7422
	<input type="checkbox"/> DISD 7493
	<input type="checkbox"/> Finance 7497

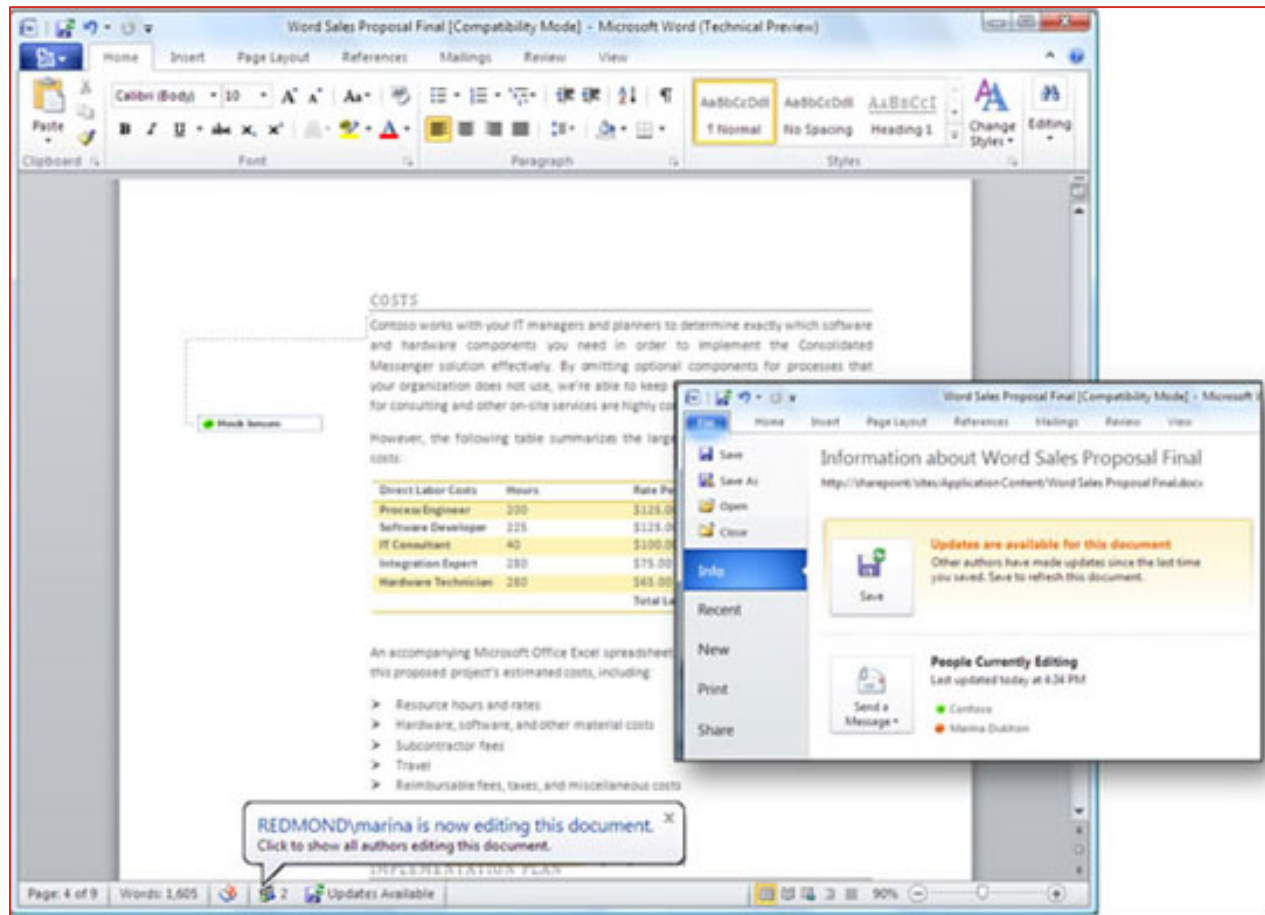
# Document management – version control

The screenshot displays the Microsoft Office 365 Sites interface. The top navigation bar includes 'Office 365' and 'Sites'. Below this, the 'FILES' tab is active, showing a ribbon with various document management actions like 'New Document', 'Upload Document', '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', 'Site Contents', and 'EDIT LINKS'. The main content area shows a document titled 'Invoice 1.docx'. A 'Version History' dialog box is open, displaying a table of document versions.

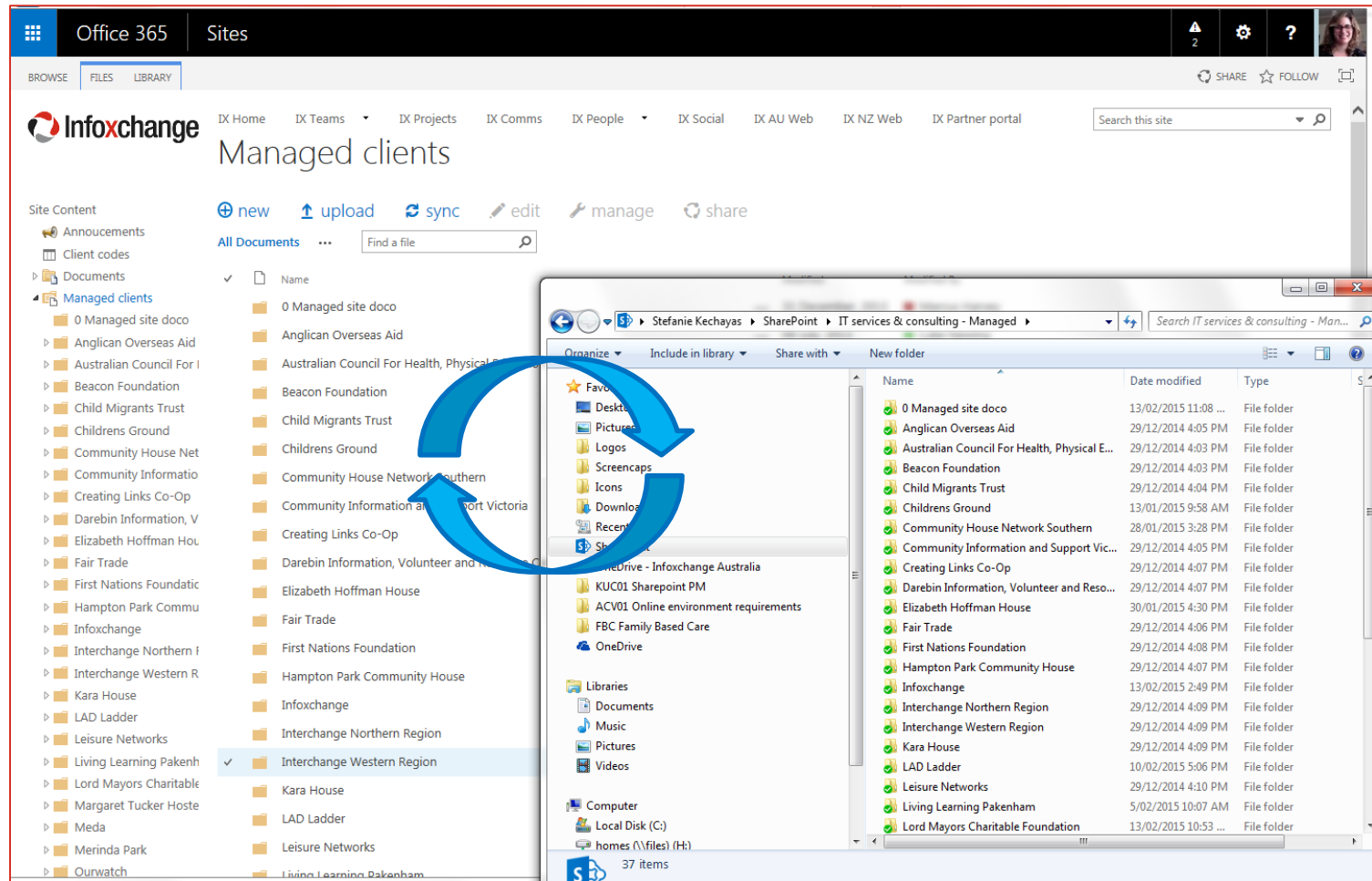
No. ↓	Modified	Modified By	Size	Comments
2.0	14/02/2015 6:43 PM	<input type="checkbox"/> Stefanie Kechayas	18.4 KB	
1.0	15/10/2014 3:47 PM	<input type="checkbox"/> Stefanie Kechayas	18.4 KB	

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

# Document management – Co-authoring



# Document management – Offline syncing (use with caution)





# Team collaboration

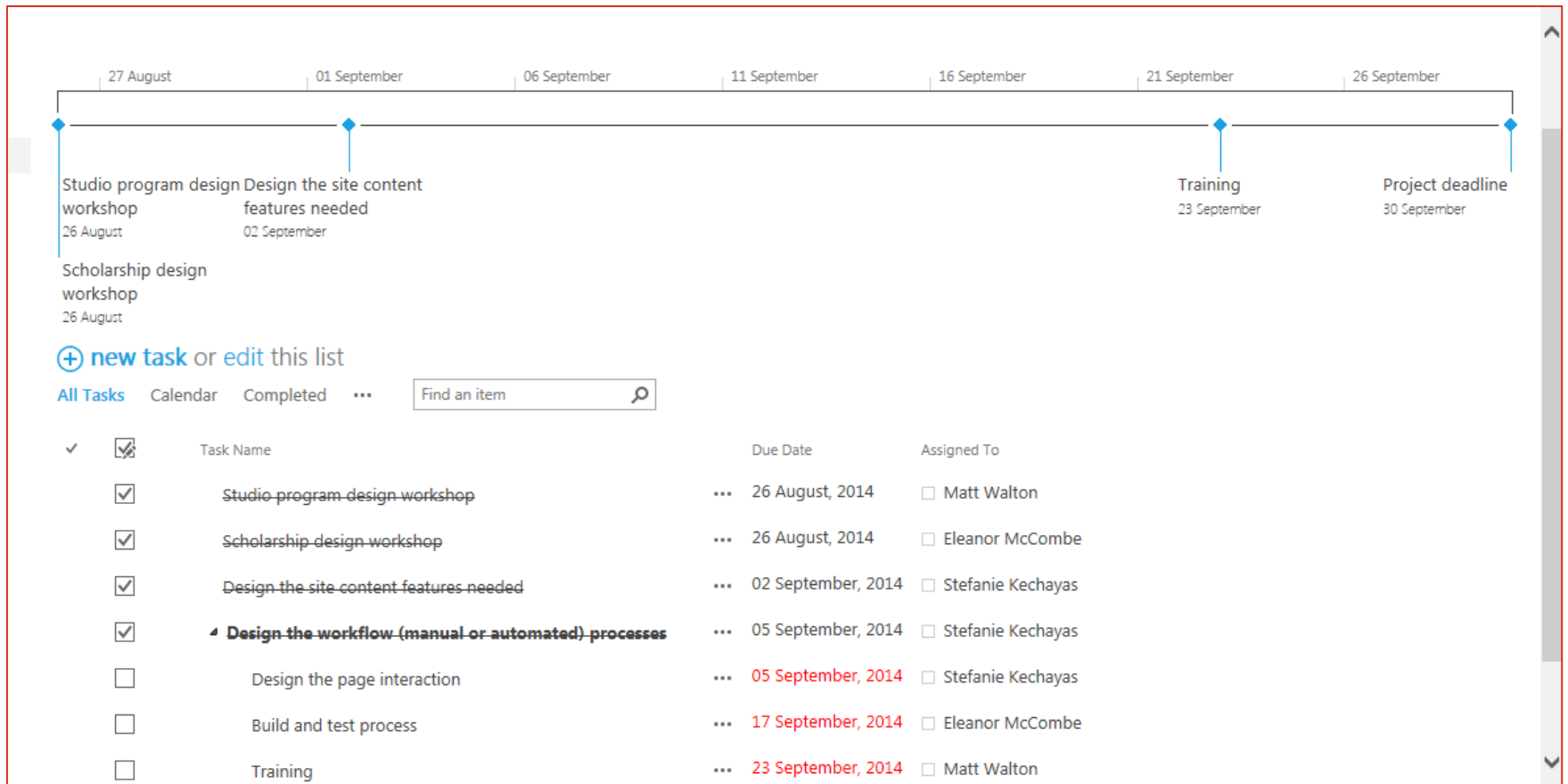
The screenshot displays an Office 365 SharePoint site for 'Kids Under Cover'. The top navigation bar includes links to Outlook, Calendar, People, Yammer, OneDrive, Sites, CRM, Tasks, Admin, and a user profile. The site header shows the 'Kids Under Cover' logo and name, with an 'EDIT LINKS' button and a search bar. The left sidebar contains a navigation menu with options like Home, Notebook, Documents, Studio Documents, Studio preview, Live studios, Maintenance, 2014 Scholarships, Pre-live studios, Studio build summary, Build issues, CSOs, Funding, Recent, Site Contents, and an 'EDIT LINKS' button.

The main content area is divided into three sections:

- Project Summary:** Displays 'Project deadline due in 25 days' and a timeline showing '1 late' and '2 upcoming' tasks. The timeline has markers for 11 PM and 12 AM, with a specific point labeled 'Project deadline 30 September'.
- Newsfeed:** Features a 'Start a conversation' box and a list of recent posts. The first post is from Heather Pettican, dated 25 August, with 2 others liking it. The second post is from Stefanie Kechayas, dated 25 August, with a 'Like' button.
- Documents:** Shows a list of documents with columns for Name, Modified, and Modified By. The documents include 'KUC documentation', 'Scholarship Docs', 'Example process-Maintenance', 'Kids Under Cover process templates', 'KUC Scholarship Program Workshop', and 'Proj mgmt workshop agenda 26-08-2014'.



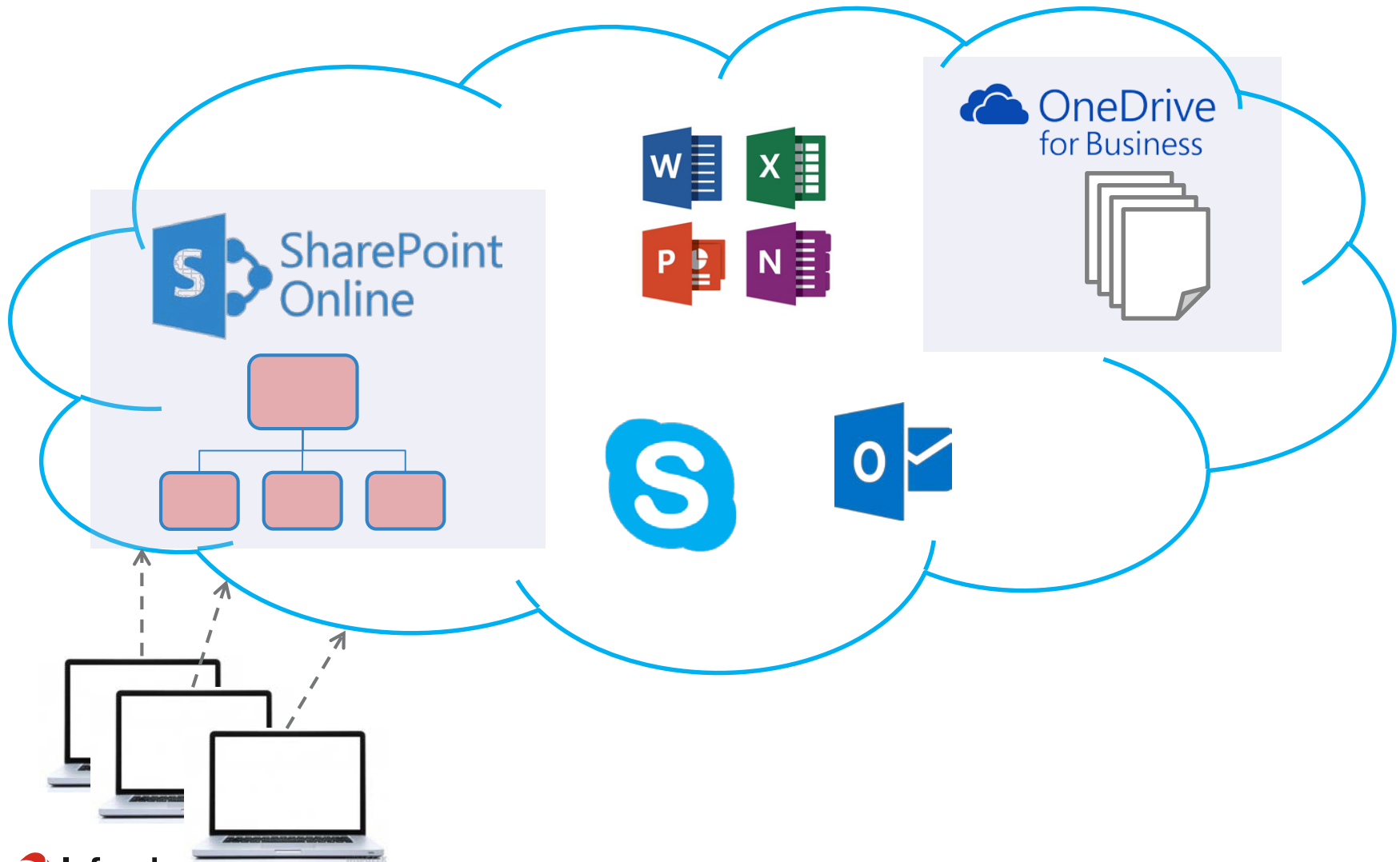
# Team collaboration



**“Infoxchange is leading the way in providing technology to the not-for-profit sector and creating a more digitally inclusive society”**

## Alternatives and other tools

# Office 365



# The full suite

The screenshot displays the Infoxchange SharePoint intranet homepage. At the top, a red navigation bar contains the 'Office 365' and 'Sites' menus. Below this, a 'My apps' panel is open, showing a grid of application tiles: Outlook, Calendar, People, Yammer, OneDrive, Sites, CRM, Tasks, Word Online, Excel Online, PowerPoint Online, OneNote Online, and Admin. The main content area features a sidebar with a list of links including 'IX Policies, Processes & Procedures', 'IX Support Information', 'IX Job Vacancies', 'IX Phone List', 'IX Useful Links', 'CEO One on Ones', 'IX Projects', 'IX Social', 'IX Message Calendar', and 'Recycle Bin'. The central content area includes a 'News and updates via Yammer' section with a search bar and a 'Welcome to the new look intranet' announcement. The right sidebar contains a search bar, social media icons for Facebook and Twitter, and a list of recent updates with timestamps.

Office 365 Sites

My apps

- Outlook
- Calendar
- People
- Yammer
- OneDrive
- Sites
- CRM
- Tasks
- Word Online
- Excel Online
- PowerPoint Online
- OneNote Online
- Admin

IX Policies, Processes & Procedures

IX Support Information

IX Job Vacancies

IX Phone List

IX Useful Links

CEO One on Ones

IX Projects

IX Social

IX Message Calendar

Recycle Bin

EDIT LINKS

Site Contents

News and updates via Yammer

What are you working on?

Infoxchange MYKI Commuter Club

Our cards run out soon so see Ben to update your details or join...

Welcome to the new look intranet

Take a tour of our new homepage...

Infoxchange

16/02/2015 4:30

17/02/2015 9:30

17/02/2015 2:00

Infoxchange

Technology for Social Justice

# SharePoint vs OneDrive



- 10GB + .5gb per license (free), expandable (\$)
- Store files, calendars, contacts, and more
- Data is centrally managed, intended for shared files

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



Files can be taken Offline with OneDrive Desktop Client

# Yammer

## The enterprise social network

The screenshot displays the Office 365 Network Yammer interface. At the top, the header includes the 'Office 365 Network' logo and a tagline: 'Get advice and share best practices with thousands of Office 365 customers'. Below the header is a navigation bar with 'Home', 'Inbox' (2), and a notification bell (2). A search bar is present for finding people, groups, and conversations, along with an 'Invite' button and a menu icon.

The main content area is divided into several sections:

- Left Sidebar:** Features a user profile for 'Stefanie Kechayas' and a 'Groups' section with a list of groups including 'SharePoint Online...', 'SharePoint on Az...', 'SharePoint IT Pro', 'Delve', 'SharePoint On-Pr...', 'Power BI', and 'All Network'. Each group has a member count (e.g., 20+, 6, 20+). At the bottom of the sidebar are links for 'Browse Groups' and 'Create Group'.
- Announcements:** A section showing two announcements. The first is 'The Evolution of SharePoint' posted by Mike Holste (Microsoft) on February 3 at 6:15am, with 18 comments and 3 likes. The second is 'Introducing Boards in Office Delve!' posted by Mike Holste (Microsoft) on January 8 at 3:11am, with 54 comments and 3 likes.
- Network Usage Policy:** A box stating 'Your use of Yammer is governed by the Office 365 Network Acceptable Use Policy.'
- Recent Activity:** A section showing recent updates, including 'John Stock and 2 others have joined SharePoint IT Pro.', 'Mike Gauntlett and 5 others joined Power BI.', 'Brian Jeffrey has joined Delve.', 'Pierre Clemenceau and 7 others have joined SharePoint Online Migrations.', and 'Joseph Kasper and 2 others...'.
- App Directory:** A section stating '4 new featured apps added to the Directory this week.'
- Bottom Section:** Includes a 'Welcome! Please post your message in a specific group.' prompt, a 'Top · All · Following (101)' filter, and a post by 'Edward Tao' titled 'To SharePoint Online Migrations' with the text 'Hey Guys,'. Below the post are several horizontal bars representing a list of items. At the bottom right, there is a button to 'Add people to this network'.

# Yammer

Office 365

Sites

BROWSE

PAGE

SHARE

FOLLOW

[IX Home](#)
[IX Teams](#)
[IX Projects](#)
[IX Comms](#)
[IX People](#)
[IX Social](#)
[IX AU Web](#)
[IX NZ Web](#)
[IX Partner portal](#)

EDIT LINKS

Search this site

IX Organisational Material

IX CEO Updates

IX Upcoming Events

IX Corporate Documents

IX Policies, Processes & Procedures

IX Support Information

IX Job Vacancies

IX Phone List

IX Useful Links

IX One on Ones

IX Projects

IX Social

IX Message Calendar

Recycle Bin

EDIT LINKS

Site Contents

Home

1

2

3

myki

Commuter Club

Infexchange Myki Commuter Club

Save 10% off the cost of an annual Myki card

Update your details with Ben now as our cards are due soon or

if you wish to join see Ben or our yammer group for details & the FAQ

Read more

Fitness in the Park

Join us for Fitness in the Park - NOW due to increased demand we offer two sessions per week

Infexchange MYKI Commuter Club

Our cards run out soon so see Ben to update your details or join...

Welcome to the new look intranet

Take a tour of our new homepage...

News and updates via Yammer

What are you working on?

Mark Walters

(Senior IT Advisor) has #joined the Infexchange network. Take a moment to welcome Mark.

Unlike

Reply

View Conversation

February 2 at 10:19am

Joined

You, David Spriggs and Glenden Woodworth like this.

Show 1 older reply

David Spriggs

Welcome Mark - great to have you on board

Like

Reply

View Conversation

February 5 at 7:08pm

Sam McLeod

Search for a staff member

Search...

f

t

in

g+

yt

v

SUBSCRIBE

Infexchange Upcoming Events

16/02/2015 4:30 PM

IX Fitness in the Park

Our weekly Fitness in the Park Personal Training Group in Powlett Reserve (just over Hoddle St). Contact Peter H or Jenna if you wish to join the group. There is a small charge which helps cover some of the cost.

17/02/2015 9:30 AM

IXA Quarterly WHS Committee

See the OHS Committee Site for details...

17/02/2015 2:00 PM

Weekly Yoga Session

Our weekly Yoga Session - Contact Alana or Jenna to join...

17/02/2015 6:00 PM

IX Board Finance Committee Meeting

Meeting of our Board Finance Committee to consider Jan 2015 Financials, Marketing and Risk reports

18/02/2015 4:30 PM

IX Fitness in the Park

Our weekly Fitness in the Park Personal Training Group in Powlett Reserve (just over Hoddle St). Contact Peter H or Jenna if you wish to join the group. There is a small charge which helps cover some of the cost.

18/02/2015 6:00 PM

IX Board Strategy Committee Meeting

Meeting of our Board Strategy Committee

23/02/2015 4:30 PM

IX Fitness in the Park

Our weekly Fitness in the Park Personal Training Group in Powlett Reserve (just over Hoddle St). Contact Peter H or Jenna if you wish to join the group. There is a small charge which helps cover some of the cost.

Infexchange

Technology for Social Justice

23

**“Infoxchange is leading the way in providing technology to the not-for-profit sector and creating a more digitally inclusive society”**

## Best practice and things to keep in mind

- Strategy
- Implementation
- Design
- Governance



# 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?

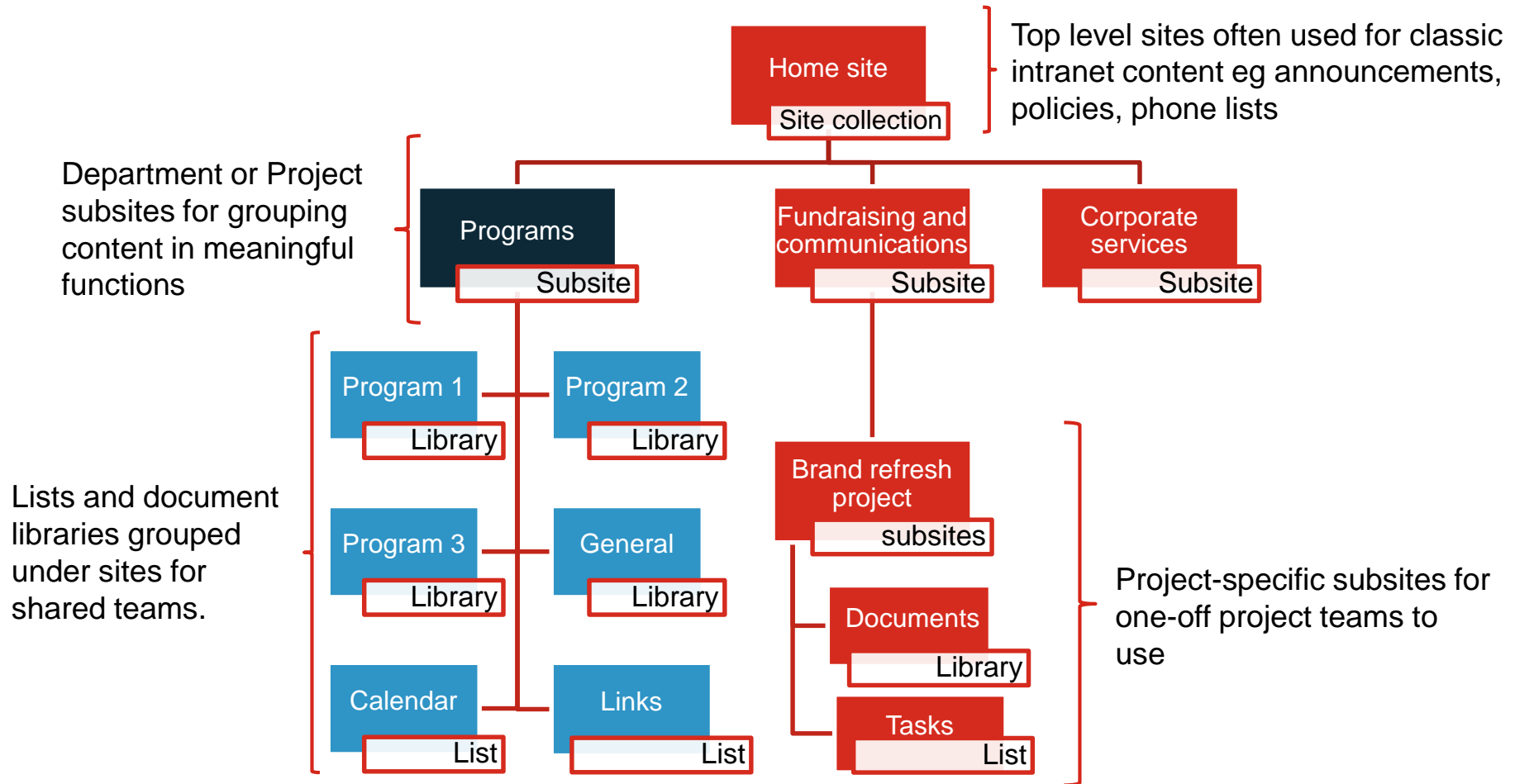
You need to be able to clearly articulate:

*What is the purpose of SharePoint for your organisation?*

# Implementation: How will you do it?

1. Do you have the capability and capacity internally to implement SharePoint?
2. Do you need an external partner to help?
3. Who will manage the intranet or libraries going forward?

# Design: What will your information architecture be?



# Governance: What permission and access strategy will you use?

1. Only lock down what has to be locked down for good reason (confidentiality, sensitivity).
2. Establish clear lines of responsibility and access for content.
3. Think about the practicalities and administrative overhead of maintaining rigid silos across the business.

# Still thinking of implementing SharePoint?

1. Define its purpose
2. Audit your current systems and information architecture
3. Assign people to lead and own the project
4. Consider the cultural implications of a more shared approach to information

# Questions and discussion.....

**Infoxchange** is a **not-for-profit social enterprise** dedicated to

## Technology **for** **Social** justice

### Our objectives:

1. Increase **Digital Inclusion** by assisting all those in our communities to access and efficiently use ICT
2. Raise the level of **Digital Proficiency** and improve the efficiency and effectiveness of the community focused sector through Information and Communication Technology
3. Advocate for and showcase the benefits of **Digital Empowerment** in our communities

### Our services for the sector include.....

1. IT plans, assessments & IT strategy development
2. Office 365, website & intranet services
3. Cloud, infrastructure & desktop services
4. Client & case management and service co-ordination solutions
5. CRM for non-profits

Contact: [skechayas@infoxchange.org](mailto:skechayas@infoxchange.org) @stefanitza

# What about privacy & security?

- » Strong security & privacy controls  
<http://office.microsoft.com/en-us/business/office-365-trust-center-cloud-computing-security-FX103030390.aspx>
- » Strong Privacy controls: ISO 27001, EU model clauses, HIPAA BAA & FISMA accredited  
<http://office.microsoft.com/en-us/business/office-365-trust-center-top-10-trust-tenets-cloud-security-and-privacy-FX104029824.aspx#complianceStandards>
- » You own and retain all rights to your data  
<http://office.microsoft.com/en-us/business/office-365-trust-center-top-10-trust-tenets-cloud-security-and-privacy-FX104029824.aspx#securityAndPrivacy>
- » By March 2015 all Australian customers will be hosted in the Australian Microsoft data centres in Sydney and Melbourne
- » Many organisations (including Qld government) have chosen to use Office 365
- » Its suitability depends on what information you intend to store and your funding agreements

# Office 365 Resources – for more information

Office 365 for nonprofits: [www.microsoft.com/office365nonprofits](http://www.microsoft.com/office365nonprofits)

E1 vs. E3 plan: <http://office.microsoft.com/en-au/business/compare-office-365-for-business-plans-FX102918419.aspx>  
(Click on the 'Enterprise' tab)

## Australian Privacy Principles

<http://www.oaic.gov.au/privacy/privacy-resources/privacy-guides/app-quick-reference-tool>

## » New Zealand Privacy Guidance on Cloud Computing

<http://privacy.org.nz/assets/Files/Brochures-and-pamphlets-and-pubs/OPC-Cloud-Computing-guidance-February-2013.pdf> & Microsoft's answers:  
[http://blogs.msdn.com/cfs-filesystemfile.ashx/\\_key/communityserver-components-postattachments/00-10-41-34-76/Standard-Response-to-OPC-Cloud-Computing-Checklist-for-Office-365-2D00-24-April-2013.pdf](http://blogs.msdn.com/cfs-filesystemfile.ashx/_key/communityserver-components-postattachments/00-10-41-34-76/Standard-Response-to-OPC-Cloud-Computing-Checklist-for-Office-365-2D00-24-April-2013.pdf)

## The Microsoft Trust Centre – Privacy, Security & actual availability information

<http://office.microsoft.com/en-us/business/office-365-trust-center-cloud-computing-security-FX103030390.aspx>

 [ImproveIT.org](http://ImproveIT.org)

Resources to help your organisation get the most from your technology investment



# Additional Office 365 Support available

Office 365 readiness assessments  
*offered in partnership with Connecting Up & TechSoup NZ:*

- » AU - <http://www.connectingup.org/office365>
- » NZ - <https://www.techsoup.net.nz/office365>

Office 365 DIY workshops

Additional ConnectingUp webinars including a practical demonstration.

Implementation services and migration advice

SharePoint configuration and development

Contact [skechayas@Infoxchange.org](mailto:skechayas@Infoxchange.org) or (03) 9418 7471 or @stefanitza