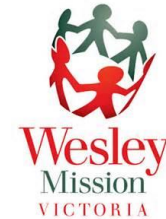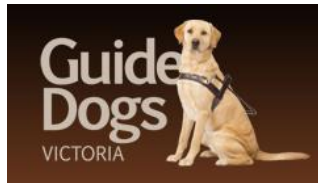**Increasing the capacity of our communities to engage with technology**

Introduction to SharePoint
Connect and empower your organisation

Matt Walton – Senior IT Consultant

mwalton@infoxchange.org - 27th September 2016

Infoxchange is a not for profit organisation that has supported more than 100 non-profits to move to Office 365 and SharePoint including:
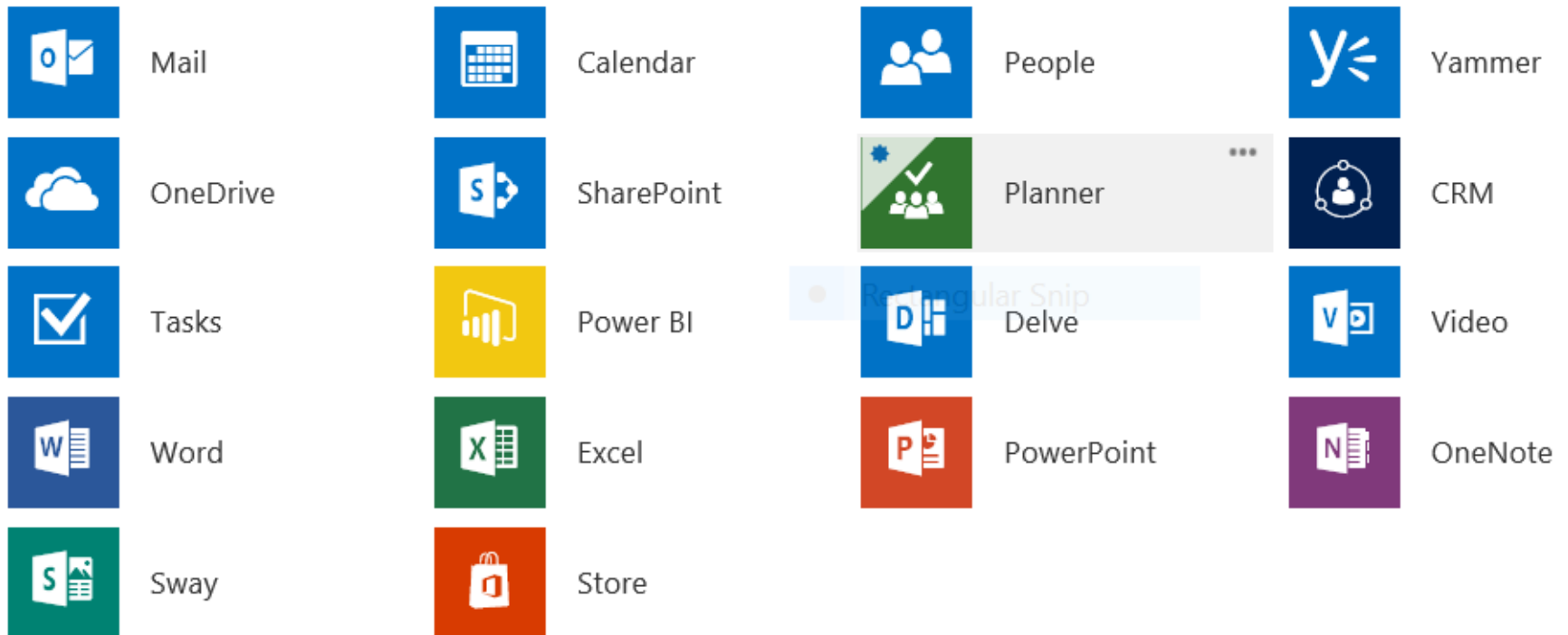
Agenda

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

Mail	Calendar	People	Yammer
OneDrive	SharePoint	Planner	CRM
Tasks	Power BI	Delve	Video
Word	Excel	PowerPoint	OneNote
Sway	Store		

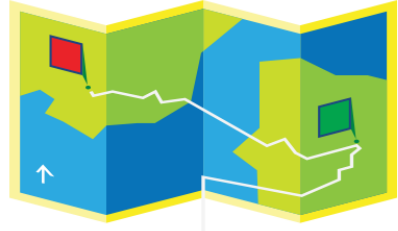Office 365 E1licenses (including SharePoint) are free for eligible NFPs

Microsoft Roadmap

Keep an eye out for:

» SharePoint sync tool upgrade in late 2016

» Expansion of Groups

» Upgrades to SharePoint

» Flow

» Power Apps

» Mobile 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   Search for an update

▼ 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   ⊕

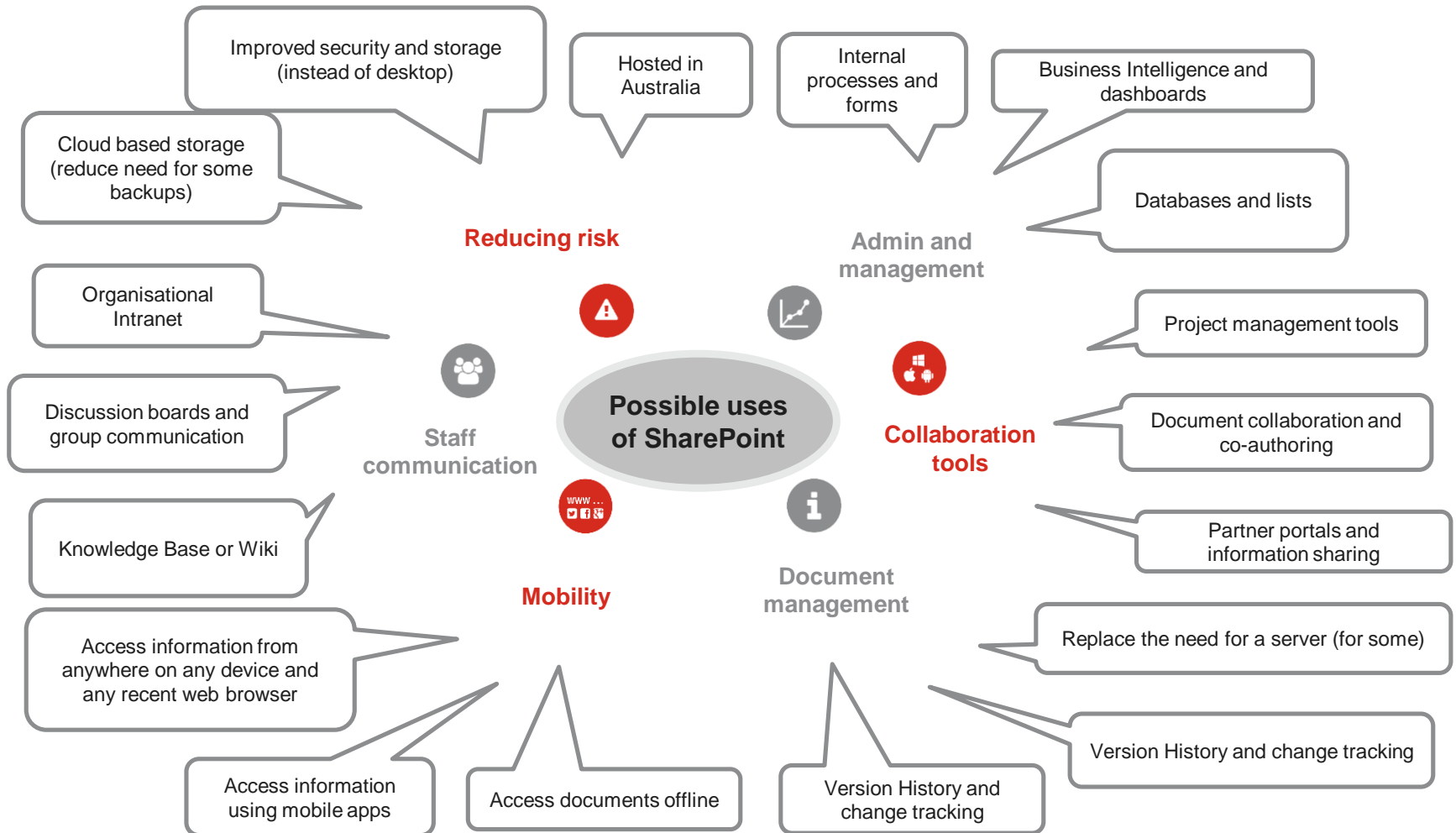## http://fasttrack.microsoft.com/roadmap

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

Improved security and storage (instead of desktop)

Cloud based storage (reduce need for some backups)

Hosted in Australia

Internal processes and forms

Business Intelligence and dashboards

Databases and lists

Reducing risk

Admin and management

Organisational Intranet

Project management tools

Possible uses of SharePoint

Collaboration tools

Discussion boards and group communication

Document collaboration and co-authoring

Staff communication

Knowledge Base or Wiki

Partner portals and information sharing

Mobility

Document management

Access information from anywhere on any device and any recent web browser

Replace the need for a server (for some)

Version History and change tracking

Access information using mobile apps

Access documents offline

Version History and change tracking

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SharePoint does…

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

Team sites – Supports teams working on projects together by providing a centralised spot for tasks, calendars, documents, links and other useful tools.
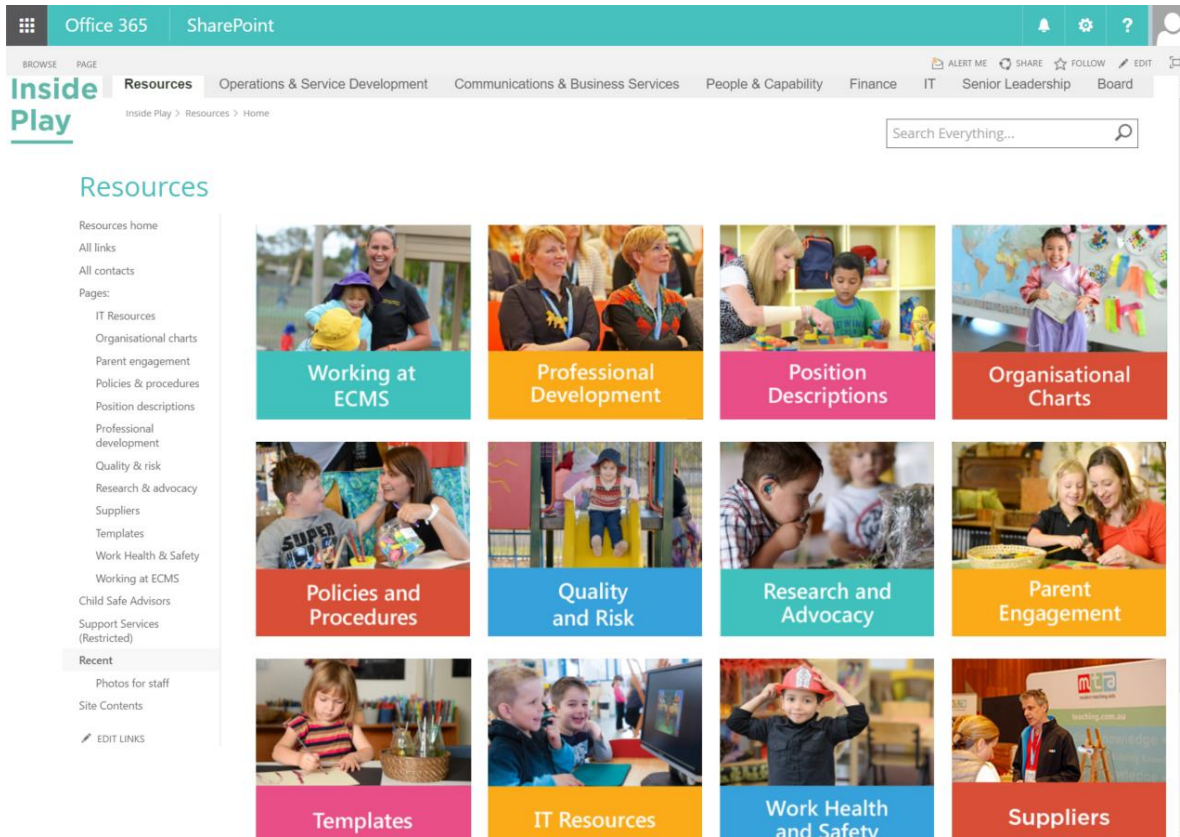
Administration Process – SharePoint can be used to collect data through forms, store data in lists and manage internal processes using workflows

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

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Intranet
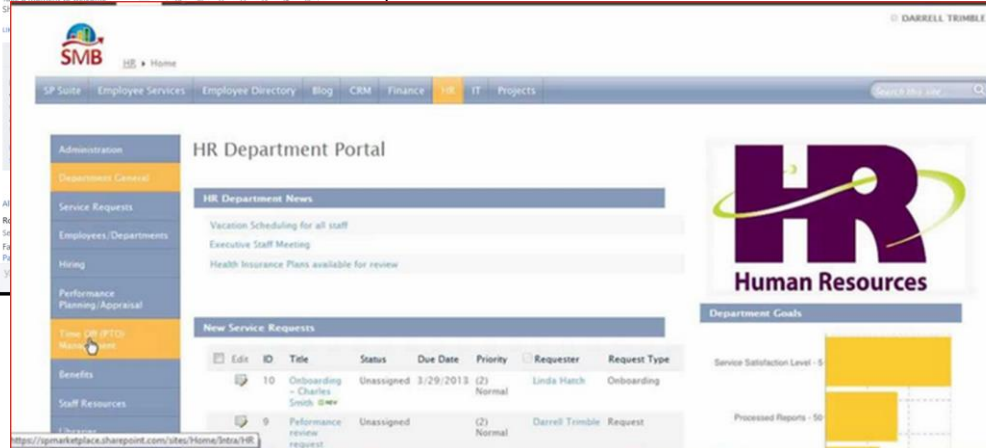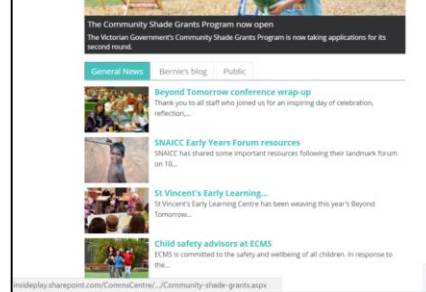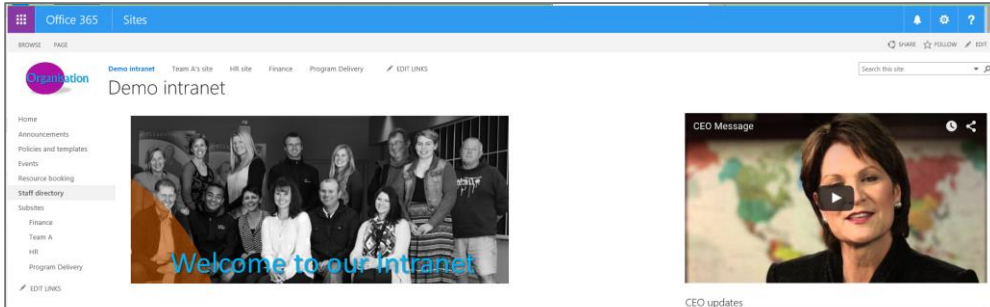
Information sharing – pages

Potential admin functions include:

- » Knowledge Base
- » Polices/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

Administration (Lists and forms)

Potential admin functions include:

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

Admin examples

Document management (libraries)
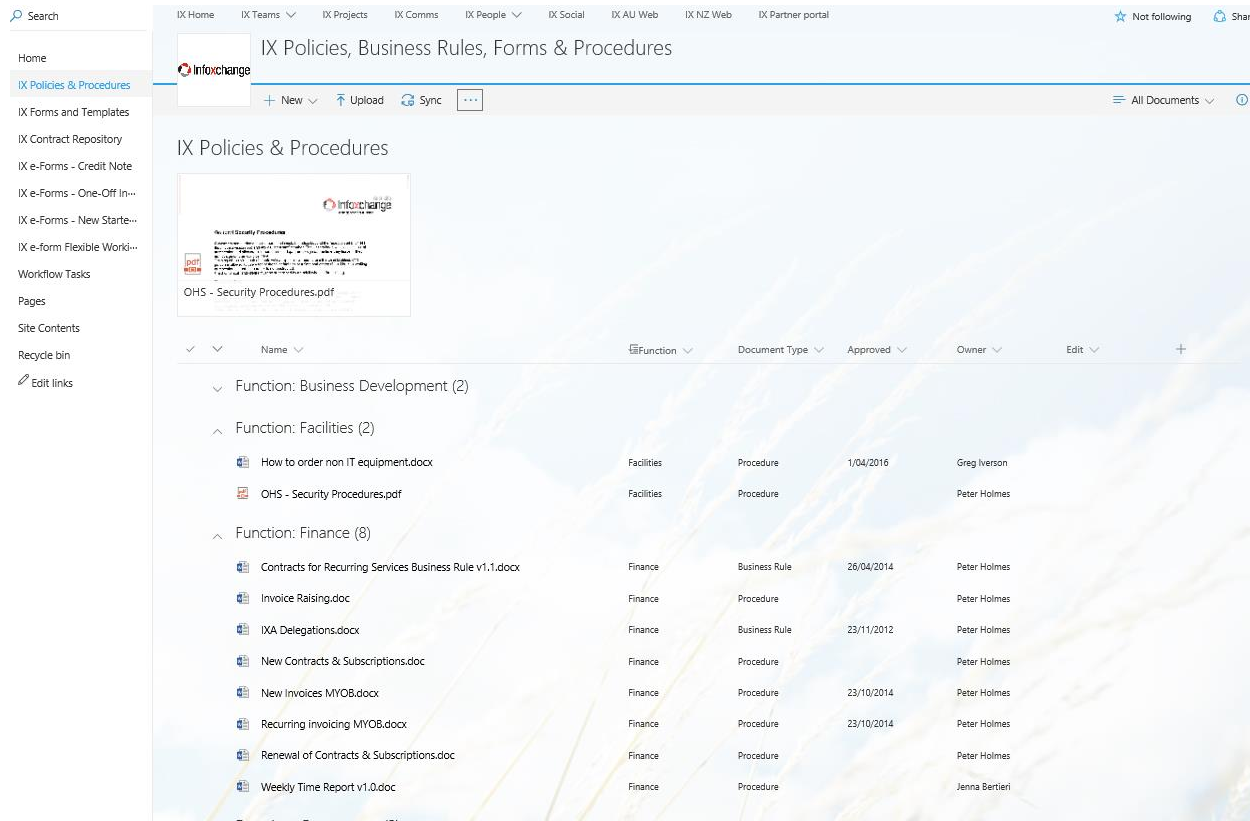
Document library functions include:

» File server replacement

» Offline local files

» Co-authoring

» Version history

» Permissions

» All file types

» Image galleries

» Metadata categorisation

» Approval workflows

Document management – version control

Document management – Co-authoring

Technology for Social Justice
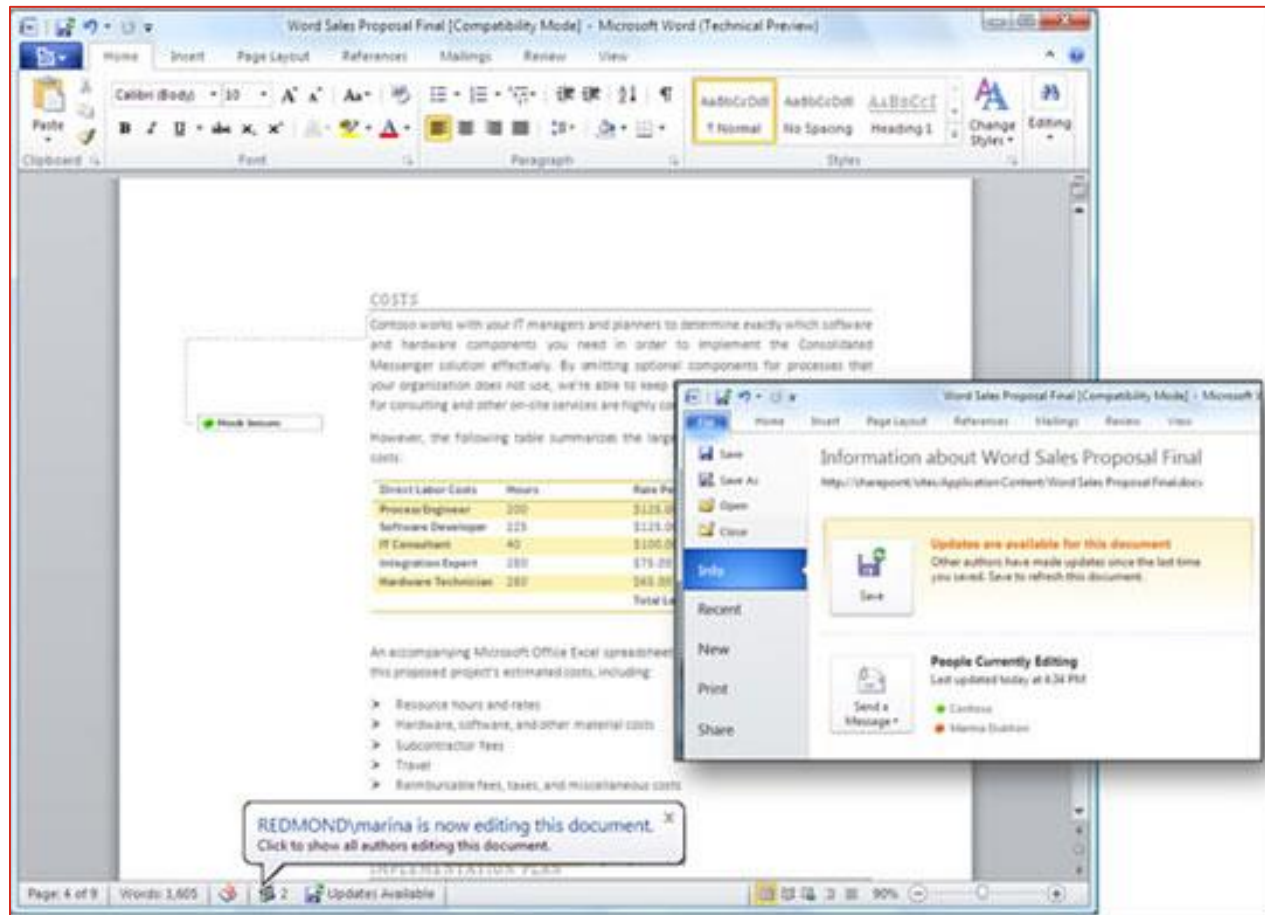
Document management – Offline syncing (use with caution)
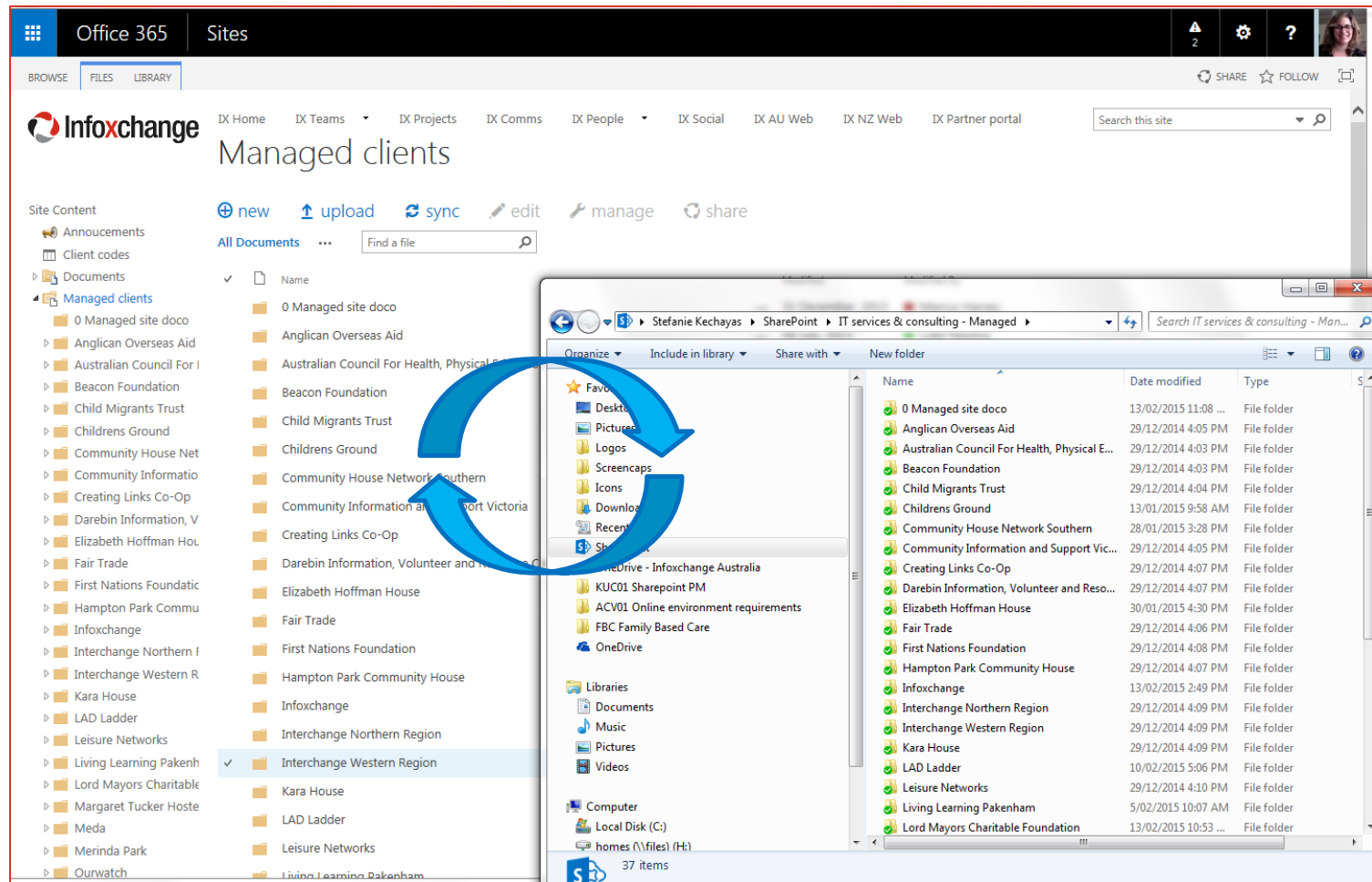
File storage – OneDrive & SharePoint

Previously SkyDrive Pro / OneDrive Pro

Also known as "Team Sites"

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

- 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. 5000 file limit for each library
5. 250 character limit for each file name with other limitations if synching
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 groups
Discussion and Collaboration	Yammer
Sharing and booking calendars, resources, rooms and equipment	Exchange Resources
Intranet and document collaboration for staff and/or boards	Office 365 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
Project Management	Office 365 Planner
Searching for organisational information	Delve
Storage and online access to videos	Office 365 video
Messaging and communication	Skype for Business
Local storage of large files or applications	NAS or server

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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?

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?

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?

4. Who will review and migrate content?

Key implementation stages

Stage 1 : Find a partner or 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 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?

Home site

Site collection

Top level sites often used for classic intranet content eg announcements, policies, phone lists

Department or Project subsites for grouping content in meaningful functions

Programs

Subsite

Fundraising and communications

Subsite

Corporate services

Subsite

Program 1

Library

Program 2

Library

Program 3

Library

General

Library

Brand refresh project

subsites

Project-specific subsites for one-off project teams to use

Lists and document libraries grouped under sites for shared teams.

Calendar

List

Links

List

Documents

Library

Tasks

List

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Technology for Social Justice

Governance: What permission and access strategy will you use?

1. Who will decide who can access what document?
2. Which documents should be restricted? Only lock down what has to be locked down for good reason (confidentiality, sensitivity).
3. Establish clear lines of responsibility and access for content.
4. Think about the practicalities and administrative overhead of maintaining rigid silos across the business.

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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
8. Communication through staff meetings, Intranet, internal communications
9. 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 One drive 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

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Top ten tips for successful implementation

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, Planner, 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%20work
    shop. 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

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Questions and discussion…..

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

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

Contact: mwalton@Infoxchange.org

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**