



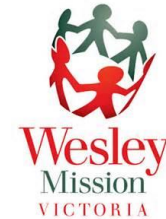
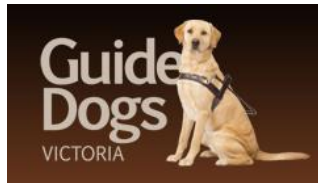
**Increasing the capacity
of our communities to
engage with technology**

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:



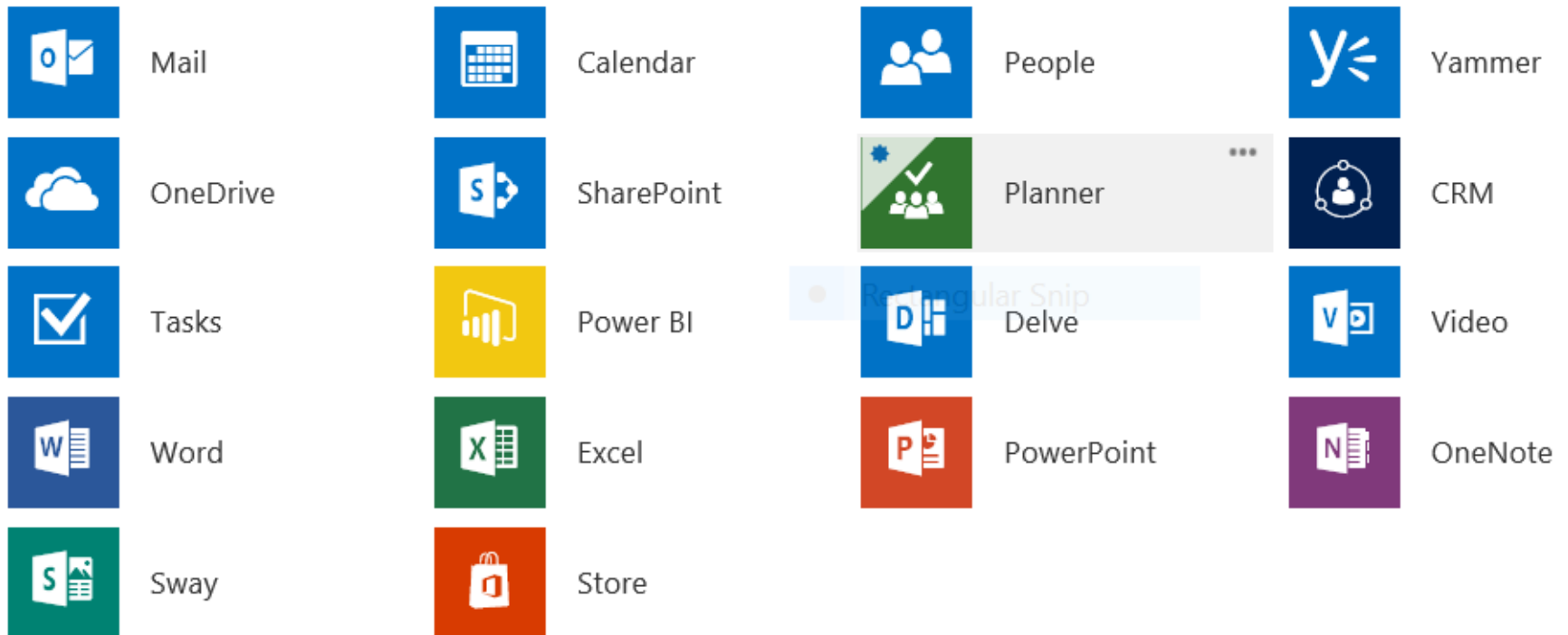
Post
Placement
Support
Service



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



Office 365 E1 licenses (including SharePoint) are free for eligible NFPs

Microsoft Roadmap

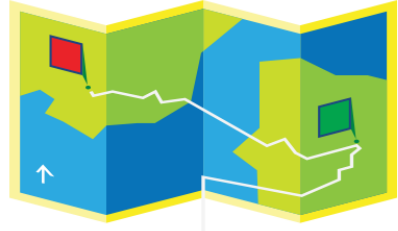
Keep an eye out for:

- » 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


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>

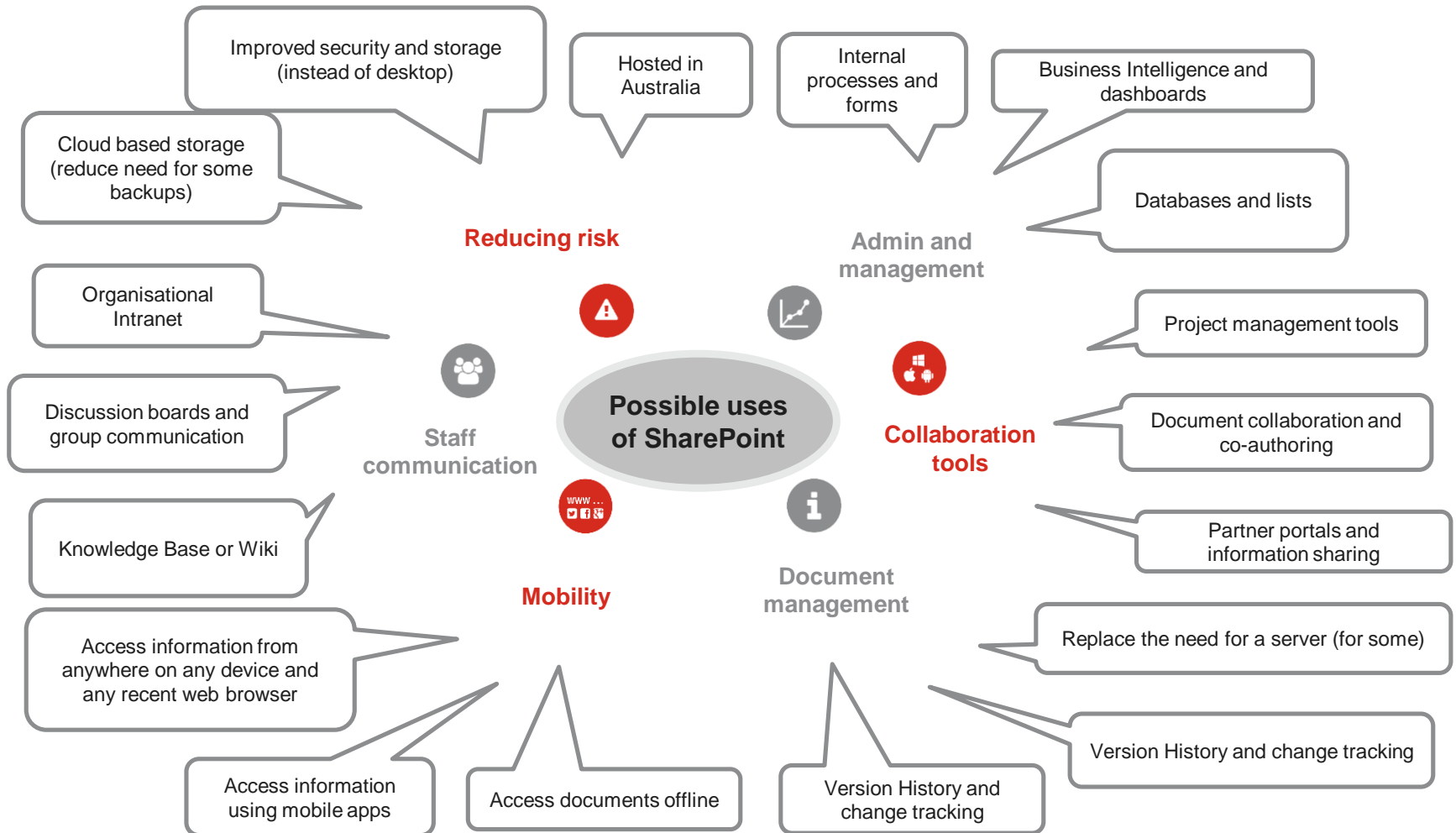
What is SharePoint online?



“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...

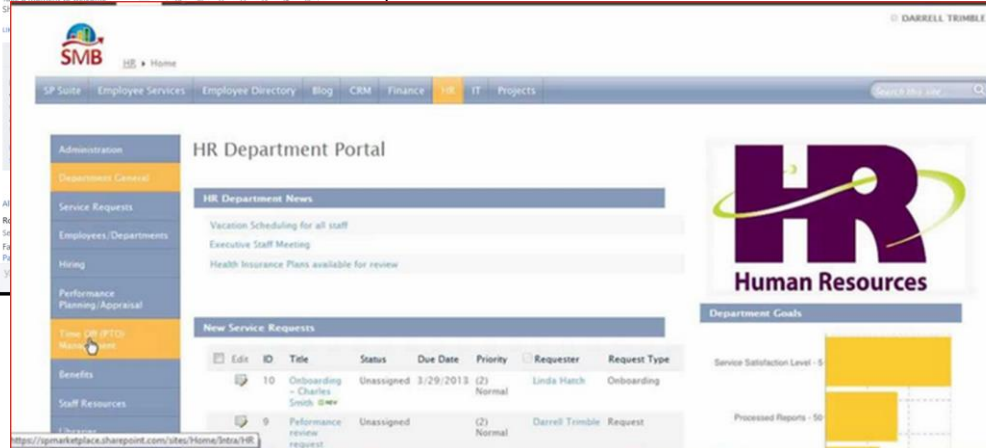
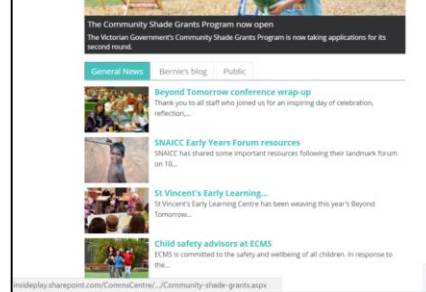
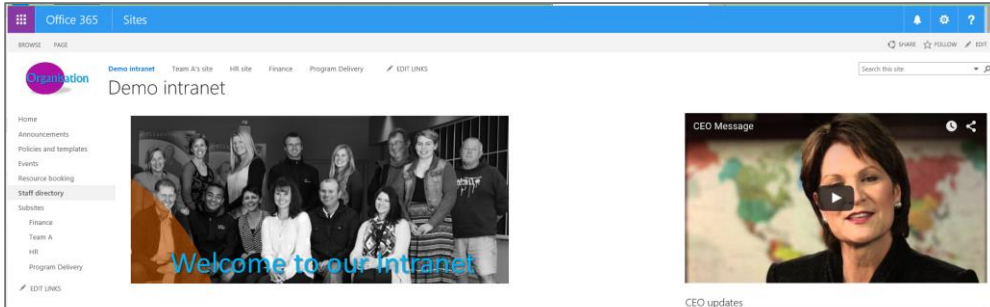
Intranet – Serves as the platform for organisation's internal homepage, a central hub of useful information and communication for organisations.

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

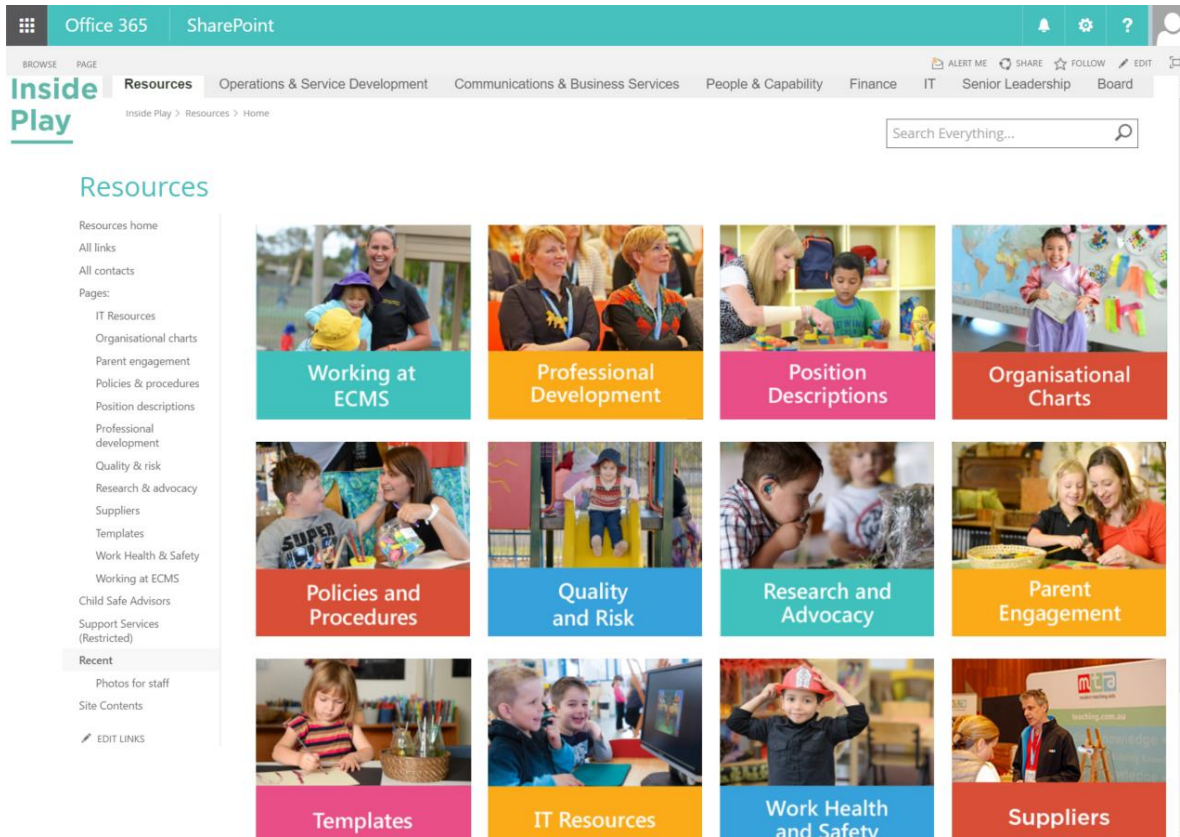
Administration Process – SharePoint can be used to collect data through forms, store data in lists and manage internal processes using workflows

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

Intranet



Information sharing – pages



Potential admin functions include:

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

Collaboration - sites

The screenshot displays an Office 365 site interface 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's left sidebar contains a 'Home' section with links to Notebook, Documents, Studio Documents, Studio preview, Live studios, Maintenance, 2014 Scholarships, and Pre-live studios. Below this is a 'Recent' section with links to Site Contents and EDIT LINKS. The main content area is titled 'Project Summary' and features a 'Project deadline due in 25 days' notification. A timeline shows the project deadline at 12 AM on 30 September. Below the timeline is a 'Newsfeed' section with a 'Start a conversation' button and two posts: one from Heather Pettican and another from Stefanie Kechayas. To the right of the newsfeed is a 'Documents' section with a list of files including 'KUC documentation', 'Scholarship Docs', 'Example process-Maintenance', 'Kids Under Cover process templates', 'KUC Scholarship Program Workshop', and 'Proj mgmt workshop agenda 26-08-2014'.

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

Start August 1

August 1 - December 30

Board Meeting - Monday

19.09.2016

September 19

Board Meeting - Monday

21.11.2016

November 21

Timesheet Project

January 2 - August 23

Board Meeting - Monday

20.03.2017

March 20

Board Meeting - Monday

15.05.2017

May 15

Board Meeting - Monday

17.07.2017

July 17

Finish August 23

new task or edit this list

All Tasks

Calendar

Completed

Find an item

Task Name

Due Date

Assign

Project communication and management

Project Management

Board Budget Review and Approval

Install Microsoft Project onto Annie-Sai-PC

Put in place Cybersecurity Insurance

Define communication strategy

Develop communication templates

Approve communication templates

Create Budget Reporting template for Board Meetings

Initial Communications re Project commencement

Communicate to all staff New ICT Support Officer and role

Send Initial Communication to all staff re Project commencement

Communicate the Comms Strategy to relevant parties

Communicate to IconGlobal Project Approval and start engagement

Plan project meetings

Define project resourcing and confirm commitments

Confirm Gateways Resourcing for Project for Roles & Teams - Commit Resources

Gateways Sharepoint Project Team

Gateways Sharepoint Administrator

Gateways O365 Administrator

April 24, 2017

June 22, 2017

August 1

July 22

August 4

July 29

August 1

August 8

August 1

August 2

August 1

August 1

August 1

August 2

August 8

August 15

August 1

August 1

August 1

August 1

Assign

Assign

Assign

Assign

Assign

Assign

Assign

Assign

Assign

Assign

Assign

Assign

Assign

Assign

Assign

Assign

Assign

Assign

Assign

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-aad986a9-0b2b-4b07-b6d7-2b69564ee847?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

DIY Office365 Advanced Email wk3 2016-09-23

DIYAdvancedEmail Week 1 080916

DIYAdvancedEmail Week 2 150916

DIYAdvancedEmail Week 3 220916

September 9

4 days ago

September 7

September 15

4 days ago

Arun Mandala

Joey Lau

Joey Lau

Joey Lau

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

 Infoxchange

Technology for Social Justice

12

Administration (Lists and forms)

Office 365 | SharePoint

BROWSE PAGE

Infoxchange 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](#)

Infocchange 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

Infocchange 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: Approved by CS Manager (2)
 Status: Awaiting BU Approval (8)
 Status: Awaiting CS Approval (19)
 Status: Credit Note has been cancelled by BU Manager (2)
 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 *

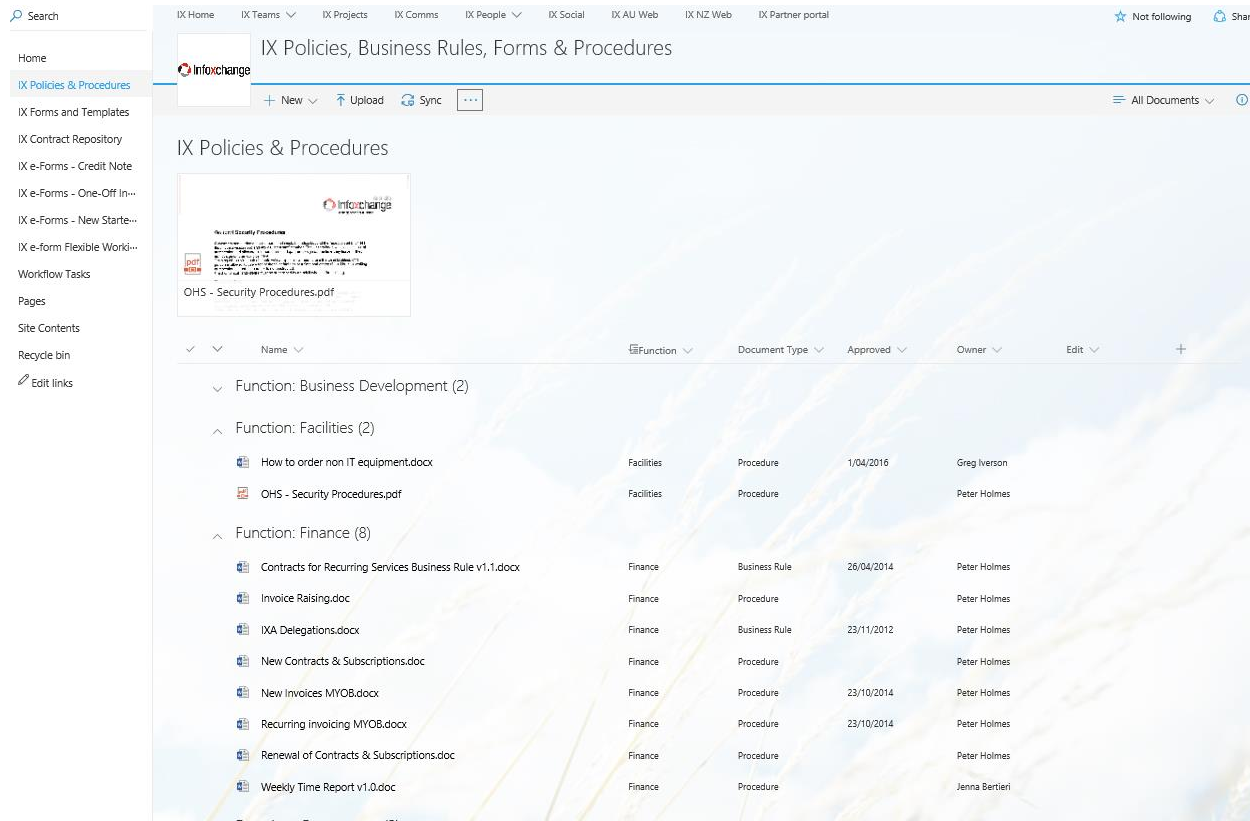
Due Date

Company	Date Invoice Raised...	Amount Of Invoice...	Amount to be Credi...	Amo
		\$25,000.00	\$22,500.00	
		\$3,636.36	\$3,636.36	

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):
☐ SELECT ALL
☐ Alarm Code Please add to HR system
☐ Security Pass Number Please add to your records
☐ Telephone Extension
☐ Telephone Port
☐ Telephone on Desk
☐ Take photo of New Starter
☐ Update Active Directory record
☐ Atherton 7850
☐ Colleswood 7840
☐ CRM 7432
☐ DISO 7495
☐ 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

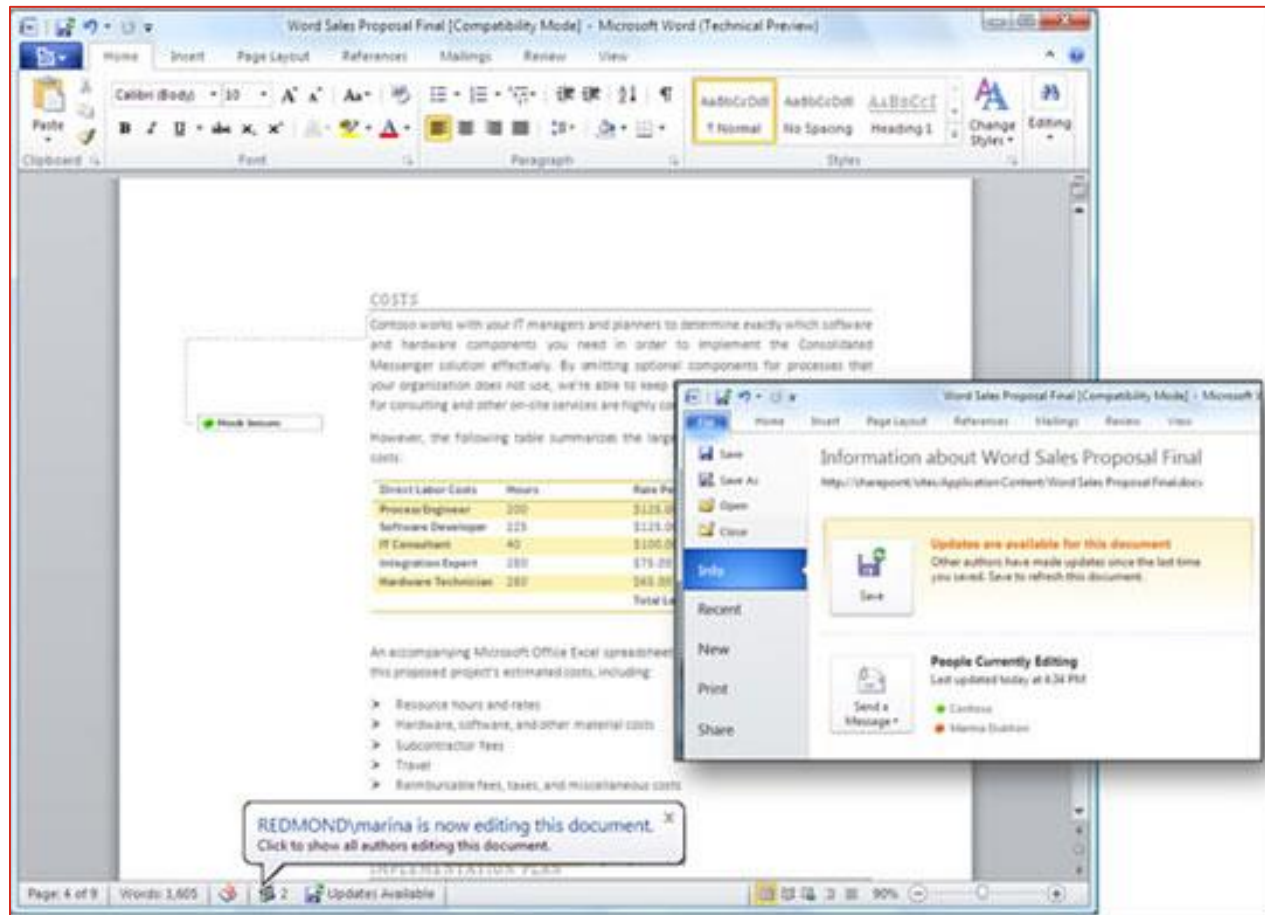
Document management – version control

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', 'Open & Check Out', 'Manage', 'Share & Track', 'Copies', 'Workflows', and 'Tags and 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.

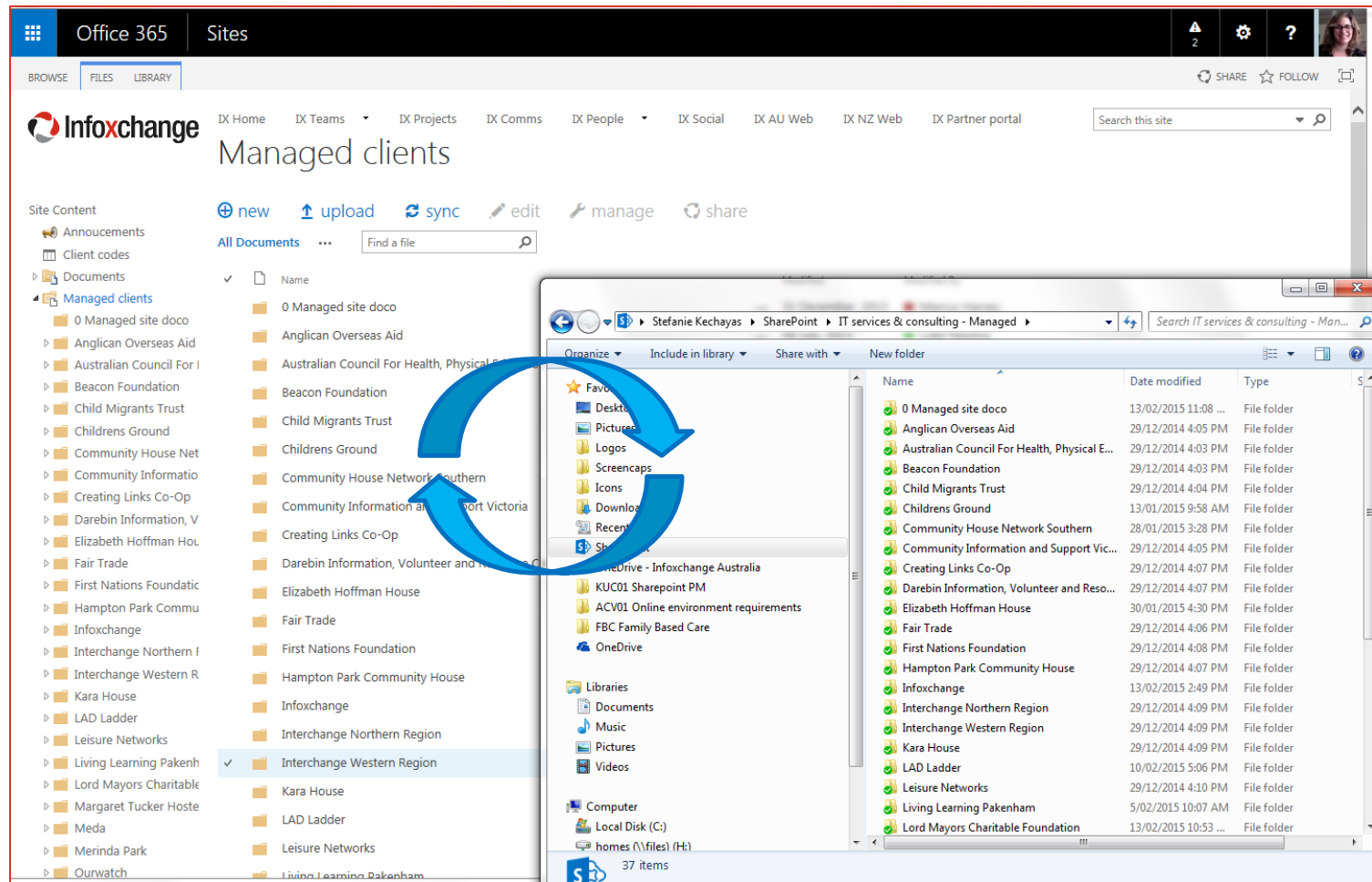
No. ↓	Modified	Modified By	Size	Comments
2.0	14/02/2015 6:43 PM	<input type="checkbox"/> Stefanie Kechayas	18.4 KB	
1.0	15/10/2014 3:47 PM	<input type="checkbox"/> Stefanie Kechayas	18.4 KB	

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?

Document management – Co-authoring



Document management – Offline syncing (use with caution)



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. 5000 file limit for each library
5. 250 character limit for each file name with other limitations if 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 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

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

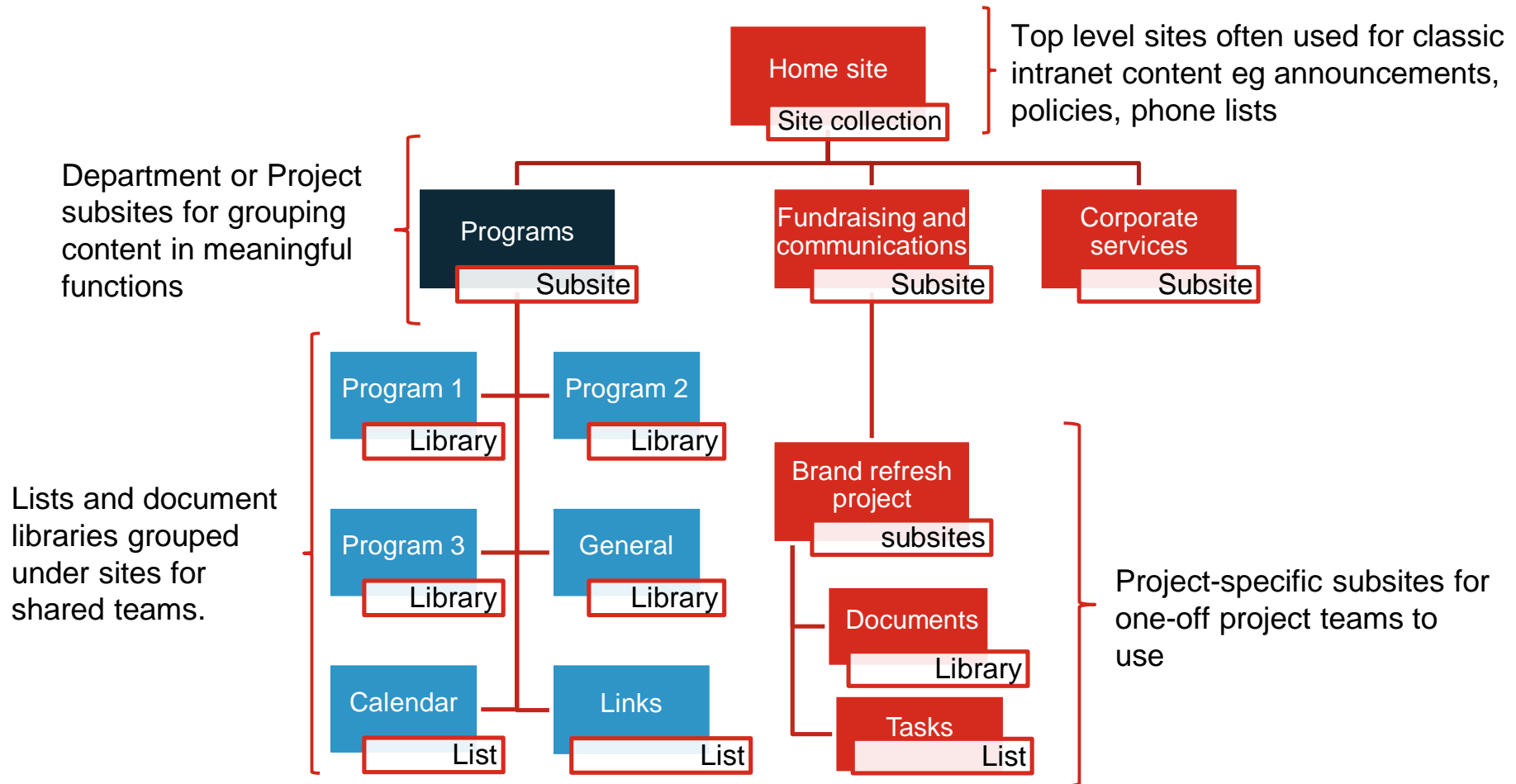
Stage 8: Pilot and testing

Stage 9: Content migration process

Stage 10: Launch and training

Ongoing evaluation and management

Design: What will your information architecture be?



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.

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

....continued

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%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

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: mwalton@Infoxchange.org