PMG-E01: SHAREPOINT SYSTEM

PURPOSE:	To describe the project collaboration and document-sharing system mandated for use on all UF projects, outline the process for gaining access, and briefly describe the use of SharePoint.

A. Introduction

UF Planning Design & Construction (PDC) uses **Microsoft SharePoint Online** to create, store, and share documents for all University projects. SharePoint is a web-based system that is designed to facilitate and support the sharing of information and communication of ideas among people working towards a common goal. This type of online cooperative environment encourages workgroup support for the flow of information, sharing of tasks, calendars, and document management. Ultimately, this software promotes group productivity and helps organizations achieve their goals more efficiently.

B. Instructions for Obtaining Access

1) Unlike the original version used by PDC, external users are no longer required to obtain a UF ID and Gatorlink account. To gain access to and use SharePoint, though, each user must have or establish a Microsoft account tied to their business email address.

2) Project managers or PDC-IT staff can invite team members to the project site. If a user does not have a Microsoft account, they will be prompted to create one.

3) Once access has been granted, the team member will receive a notification email with instructions on how and where to sign in.

C. SharePoint Navigation & Security

1) Project sites are created from a template to ensure consistency across projects. Document libraries are grouped into five headings on the left menu: General, Financial, Design, Construction, and Closeout.

2) Access to libraries is based on the user's role on the project team. A security matrix template has been developed that identifies each consulting team (AE, CM, DB, or Cx) and their level of access. Permission levels include: "Contribute" (Add, Edit, Delete), "Add Only," "Edit Only," "Read Only," or any combination thereof.

D. Using SharePoint

1) Regardless of which platform users normally employ for internet browsing, SharePoint works best when accessed through Internet Explorer.

2) Project sites can be "followed" by clicking on the star icon in the top-right portion of the screen. This will allow users to easily navigate and find sites that they are working on.

3) Once in a library, depending on access level, users can upload new documents by using the menu or dragging and dropping files. Opening the library in a Windows Explorer view may be especially helpful when uploading or downloading multiple documents at a time.

4) To be notified when a document has been edited or added to a library, users can set an alert. To create an alert, navigate to the appropriate library. Click on the "…" icon on the menu and select "Alert Me". Fill out the form to customize various settings (such as when to send alerts and how often) and click "OK."

5) Certain libraries – including those for RFIs and Submittals – allow for the entry of "metadata" that helps characterize each document in terms of content, status, and other parameters. This metadata allows for "versioning," whereby multiple versions of a document are available despite having the exact same filename, but only the current version is immediately viewable.

6) To view most documents (Word, Excel, PDF, etc.), clicking on the filename should open the document in the browser window. To download a copy of a file, right-click the file and select "Download". To upload a document, drag and drop the file to the browser window, or click "Upload" from the menu.

7) Unlike most other document types (Word, Excel, PDF, etc.), AutoCAD and Revit (BIM) files cannot be opened directly from SharePoint. These types of files will need to be downloaded, edited locally, and uploaded back to the SharePoint library. Project teams should discuss and thoroughly plan the protocols for the use and editing of BIM files. Versioning in the BIM library can assist and ensure files are properly tracked and named, but model users and viewers must still be in synch with respect to access, the timing of updates, etc.

8) Files saved to SharePoint must be smaller than 10G and must not contain %" or "#" in the filename.