do: Running committees with SharePoint

Using the SharePoint Committee Site template

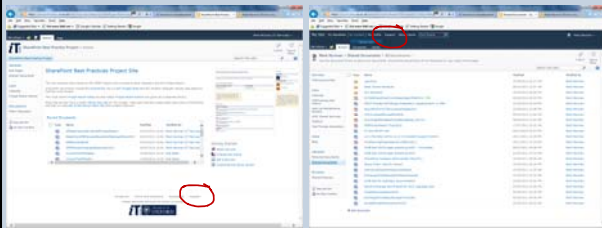Mark Norman
10 February 2014

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Introduction

- What's SharePoint?
- You and me
  - IT / committee administrators?
- The SharePoint Best Practices Project
- Finding support and documentation with Nexus SharePoint

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Oxford Nexus Support and Documentation

- Wherever you are...

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Oxford Nexus Support and Documentation

- Support forum
- Pages of documentation to help you
  - Do simple tasks
  - Set up sites
  - Perform technical administration

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Oxford Committees

- The perfect use for SharePoint
- Rather idiosyncratic to Oxford
- SharePoint is good at...
  - Managing permissions (putting people in groups)
    - Checking permissions!
  - Presenting different views to different audiences
  - Converting to PDF for 'paperless' meetings
  - Check in, check out of documents
  - Download and 'carry around'

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The Committee site template

- Self set-up/management (if you follow the instructions, you may not need a techie)
  - OK, you may need a techie to get it set up
- But running after that and adding people to your groups should be straightforward
- Easy to use
- A good 'shop window' for documents for your committee

- Look at https://sharepoint.nexus.ox.ac.uk/sites/demo1/SitePages/Home.aspx (demo department) and
  https://sharepoint.nexus.ox.ac.uk/sites/demo1/smt/SitePages/Home.aspx (demo committee site)
- Documentation at https://sharepoint.nexus.ox.ac.uk/support/SitePages/Oxford%20Committee%20template.aspx

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Oxford Committees

- Different groups may need to see different documents
  - Core members, Privileged members, Student reps
- Need dates in the diary, linked to the documents
- Typically only a few (the secretariat?) edit the documents
- "Above the line", "Below the line", "Hidden"
- Run by calendar year, or academic year
- Minutes may need to be in a more public place

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Using the site: demonstration

Easy

SharePoint experience needed

Setup expertise needed
(largely one-time)

- Agenda:
  - Putting people in groups and restricting what they see
    - Setup
    - General use
  - Putting documents in and managing them
  - Setting up a meeting
- Extras
  - Gradually get your docs on site, then 'publish' when you're ready
  - Making a PDF 'board pack'
  - Putting the minutes in a (more) public place
  - Putting the committee dates in a (more) public place

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A whistle-stop setup run-through

- Simply, follow the instructions carefully at
  - https://sharepoint.nexus.ox.ac.uk/support/SitePages/Oxford%20Committee%20template.aspx
  - But print it out!
  - Deploy the site template
  - Stop inheriting permissions and create your groups
  - Enable the publishing feature.
  - Edit the text on the home page
  - Add default values for the 'Title' and 'Committee name' calendar columns.
  - Configure the 'Site User' web parts on the 'Members' page.
  - Set the administrative links on the left to only be visible for site owners.
  - Any optional configuration
    - e.g. if the committee has some 'secret' documents, set up the Nintex workflow

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Options for your committee site

- Your answers to the questions below will indicate whether any additional configuration is required for your committee.
  1. Is 'Meeting 01', 'Meeting 02', etc a suitable naming scheme for your Committee? If not see 'Setting your own meeting ID'
  2. Does your committee run by the academic rather than the calendar year? If so see 'Grouping meetings by the academic year'
  3. Do you have different groups of members who should have different levels of access to committee documents? If so see 'Using security levels'
  4. Do you want to publish minutes to a wider audience? For example the whole department or even the whole University. If so see 'Publicising committee data'
  5. Do you want to publicise meeting dates to a wide audience? For example the whole department or even the whole University. If so see 'Publicising committee data'
  6. Do you have more than 3 groups for your site? If so see 'Adding additional groups to the Members page'

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