

Using SharePoint for research

When to use it, organization, and sharing

Instructor: Tobin Magle, PhD

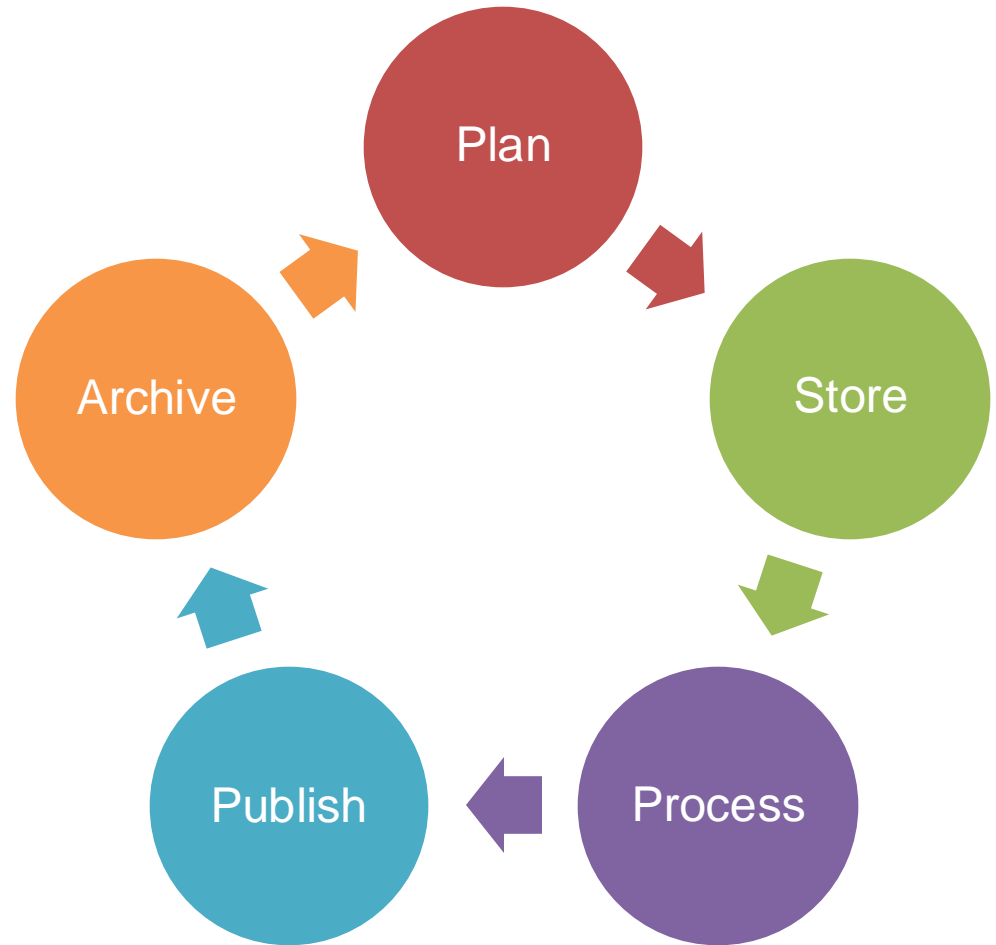
Date: August 7, 2024

Materials: <https://github.com/nuitrcs/rdm-workshops>

Outline

- What is SharePoint?
- When to use SharePoint
- SharePoint Overview
 - Structure
 - Data Organization
 - Access controls

Research data cycle



The slide features a solid purple background. In the top-right and bottom-left corners, there are decorative elements consisting of overlapping, semi-transparent geometric shapes in various shades of purple, creating a layered, architectural effect.

Storage needs change throughout
research workflow

Types of storage

What do you want to do with your data?

Process

**Clean, analyze
and visualize**

- Fast storage
- Near compute source
- Costly

Share

Collaborate

- Access for all group members
- Collaboration Tools
- Free *

Store

**Ensure data
integrity**

- Access for core group members
- Replication
- Versioning

Archive

**Retain data
long-term**

- "Cold" storage for
- Less accessible
- Inexpensive
- Retention period

* licensing changing, pricing/limits may apply

Storage options

Northwestern data storage options

Process

**Clean, analyze
and visualize**

Quest Storage

Share

**Collaborate with
colleagues**

SharePoint



Store

**Ensure data
integrity**

Research Data
Storage Service
(RDSS)

Archive

**Retain data
long-term**

Research
Data Archival
Service (RDAS)



Storage options

Northwestern data storage options

Process

**Clean, analyze
and visualize**

Quest Storage

Share

**Collaborate with
colleagues**

SharePoint



Store

**Ensure data
integrity**

Research Data
Storage Service
(RDSS)

Archive

**Retain data
long-term**

Research
Data Archival
Service (RDAS)



What is SharePoint?

"Your mobile, intelligent intranet"

- Content management system for teams
- Part of Microsoft 365
- Approved by Northwestern for research
- Share with anyone who has a Microsoft account
- Secure: encryption and auditing



Related Microsoft Products



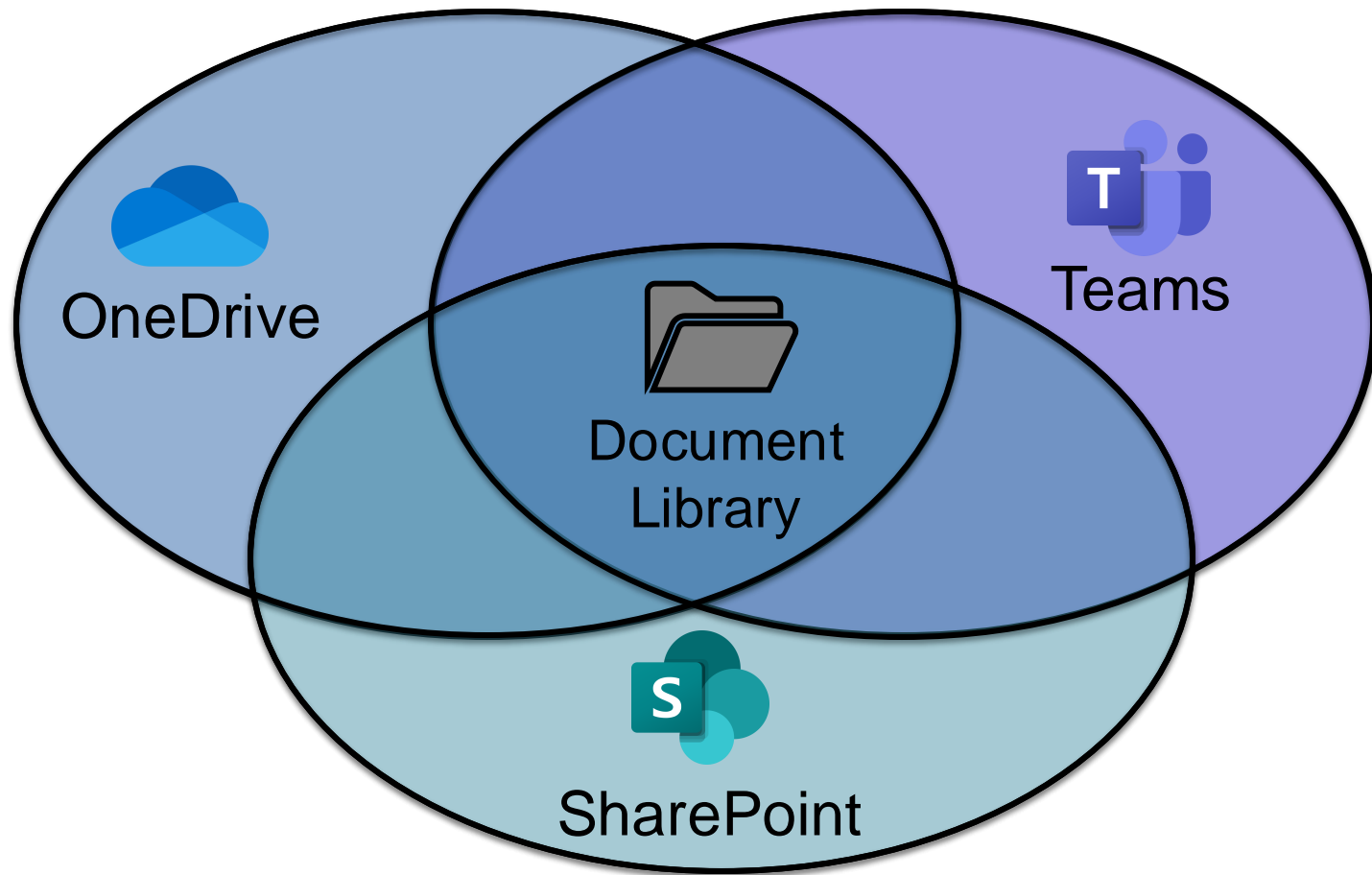
OneDrive
Personal Files



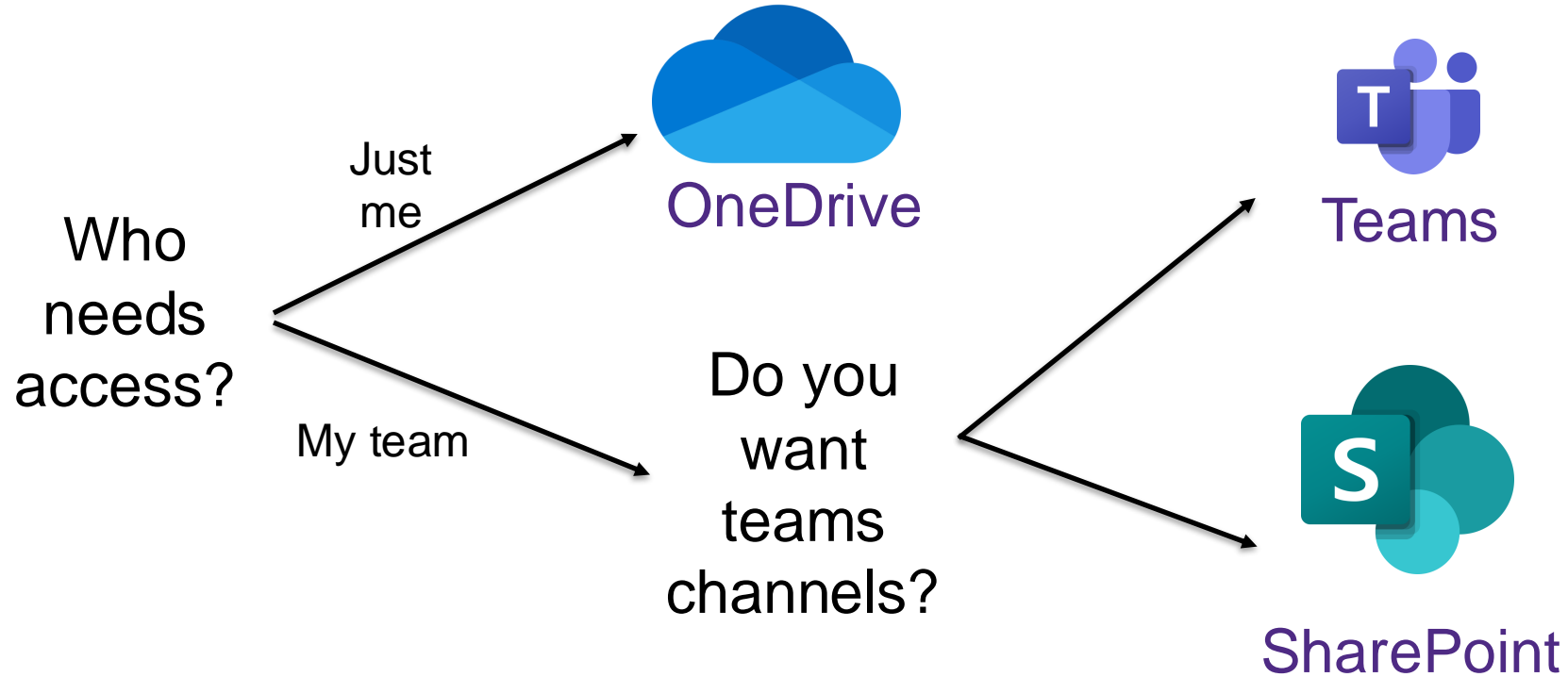
SharePoint
Team files



Teams
Team Collaboration



OneDrive vs. SharePoint vs. Teams



<https://support.microsoft.com/en-us/office/should-i-save-files-to-onedrive-or-sharepoint-d18d21a0-1f9f-4f6c-ac45-d52afa0a4a2e>

SharePoint

When to use it

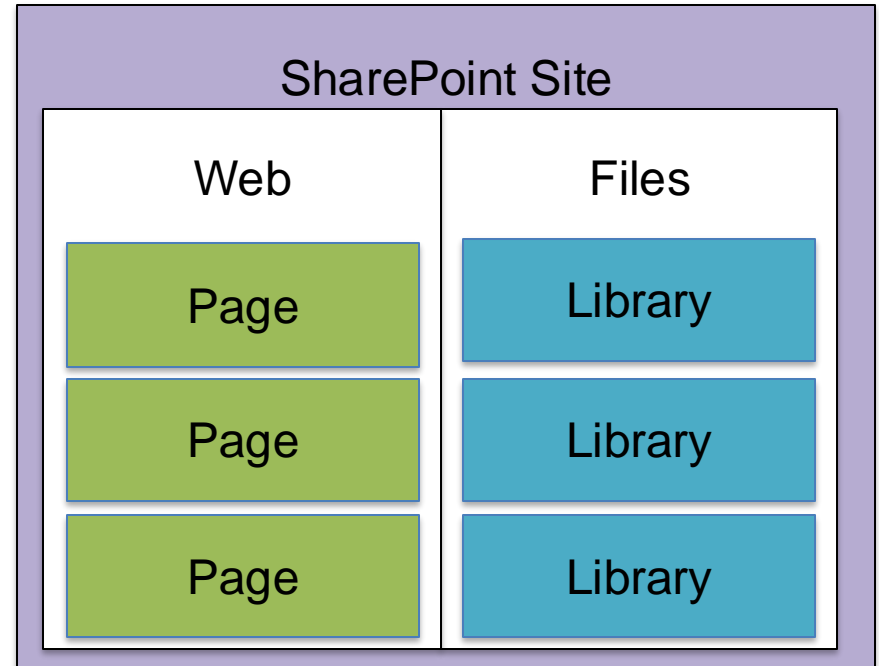
- Store files that need to be accessible to groups of users
- Collaborate on documents
- Share with people who don't have NetIDs

When not to use it

- Storing private files
- Archiving data
- Very large files (> 250 GB)
- Many small files (> 50,000)

SharePoint Structure

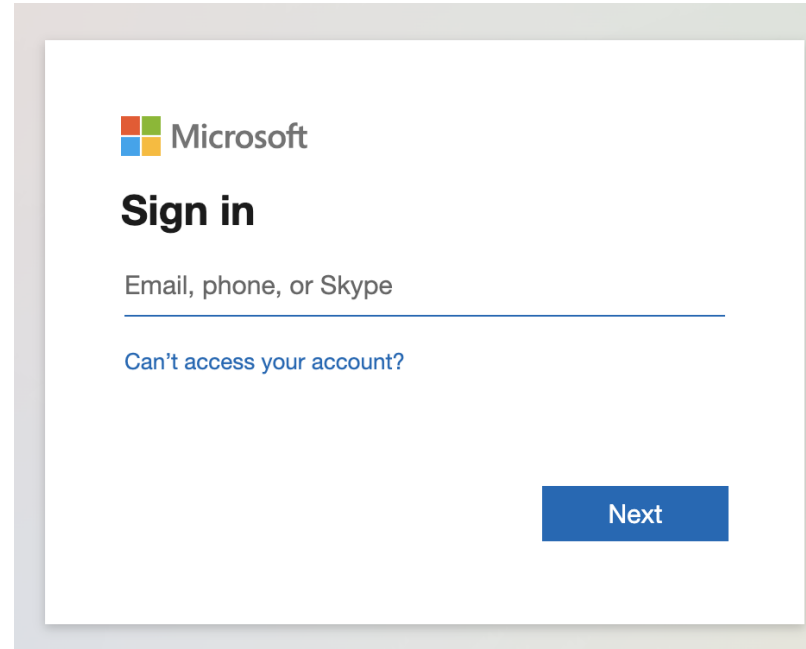
- **Sites** are made up of **pages** and **libraries**
- **Pages:** Organize content (like a webpage)
- **Libraries:** Store documents



SharePoint Overview

Log In

<https://nuwildcat.sharepoint.com/>

A screenshot of the Microsoft Sign in page. The page is white with a light gray border. At the top left is the Microsoft logo (four colored squares: orange, green, blue, and yellow) followed by the word "Microsoft" in a sans-serif font. Below the logo is the text "Sign in" in a bold, black, sans-serif font. Underneath "Sign in" is a text input field with the placeholder text "Email, phone, or Skype" in a gray font. Below the input field is a blue link that says "Can't access your account?". At the bottom right of the page is a blue rectangular button with the word "Next" in white text.

Microsoft

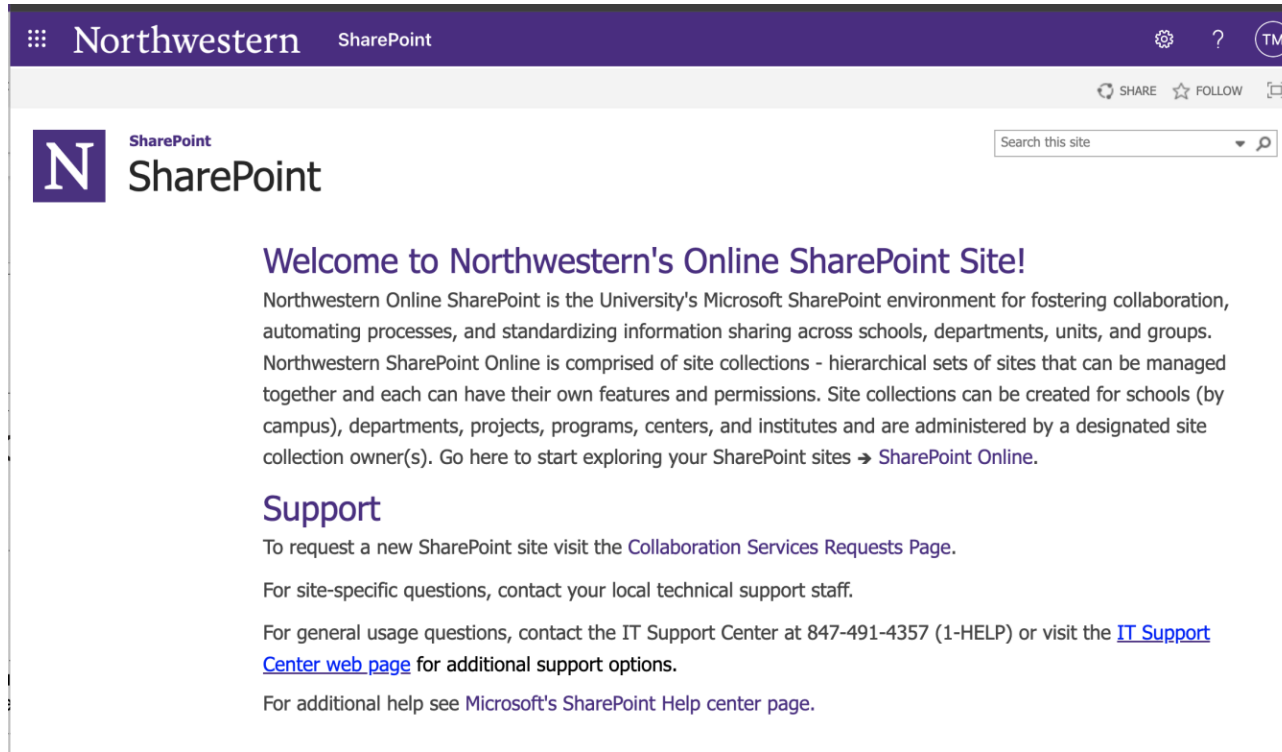
Sign in

Email, phone, or Skype

[Can't access your account?](#)

Next

Landing page



The screenshot shows the Northwestern SharePoint landing page. The top navigation bar is purple with the Northwestern logo and 'SharePoint' text. On the right are icons for settings, help, and a trademark symbol. Below the navigation bar is a secondary bar with 'SHARE', 'FOLLOW', and a mobile device icon. The main content area features the Northwestern 'N' logo and 'SharePoint' text. A search bar is located to the right. The main heading is 'Welcome to Northwestern's Online SharePoint Site!'. The text describes the environment for fostering collaboration and standardizing information sharing. It mentions site collections and provides a link to 'SharePoint Online'. A 'Support' section follows, with links to 'Collaboration Services Requests Page', 'IT Support Center web page', and 'Microsoft's SharePoint Help center page'.

Northwestern SharePoint

SHARE FOLLOW

Search this site

Welcome to Northwestern's Online SharePoint Site!

Northwestern Online SharePoint is the University's Microsoft SharePoint environment for fostering collaboration, automating processes, and standardizing information sharing across schools, departments, units, and groups. Northwestern SharePoint Online is comprised of site collections - hierarchical sets of sites that can be managed together and each can have their own features and permissions. Site collections can be created for schools (by campus), departments, projects, programs, centers, and institutes and are administered by a designated site collection owner(s). Go here to start exploring your SharePoint sites → [SharePoint Online](#).

Support

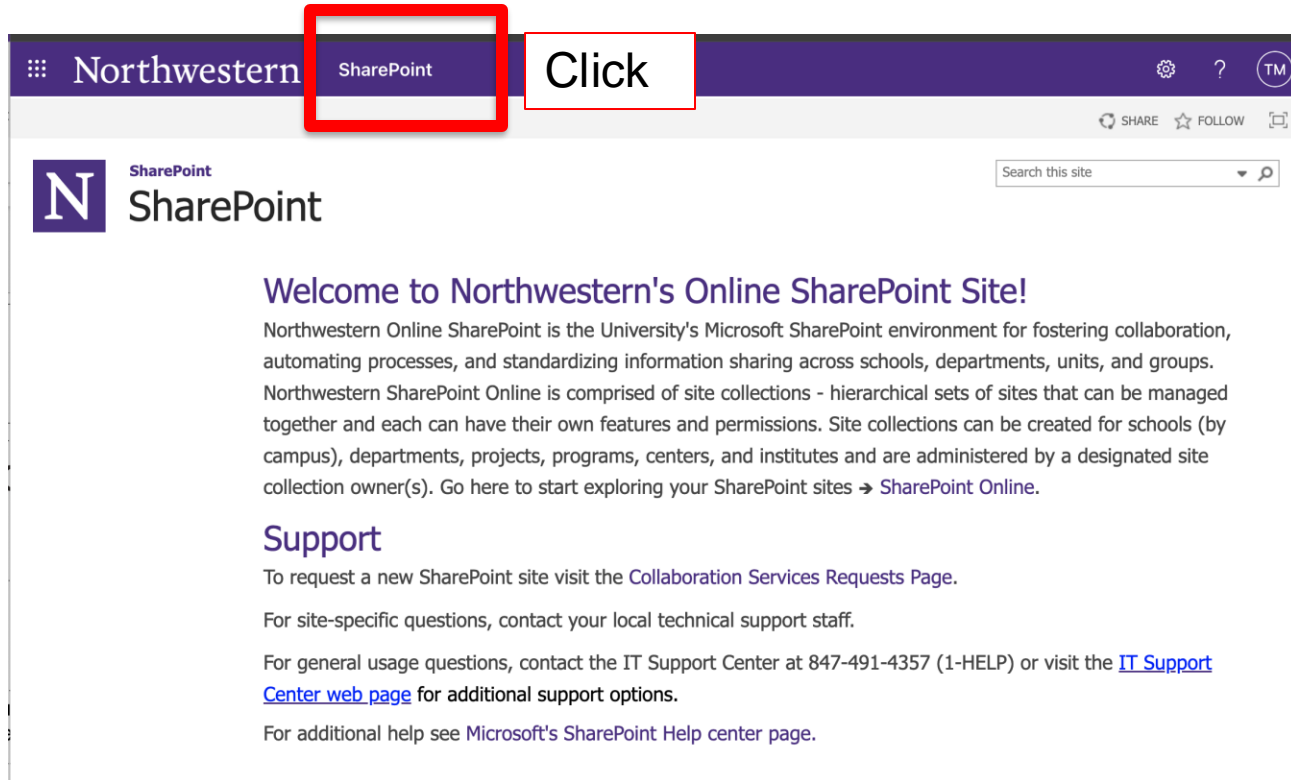
To request a new SharePoint site visit the [Collaboration Services Requests Page](#).

For site-specific questions, contact your local technical support staff.

For general usage questions, contact the IT Support Center at 847-491-4357 (1-HELP) or visit the [IT Support Center web page](#) for additional support options.

For additional help see [Microsoft's SharePoint Help center page](#).

Navigate to your sites



Northwestern SharePoint Click

SHARE FOLLOW

Search this site

Welcome to Northwestern's Online SharePoint Site!

Northwestern Online SharePoint is the University's Microsoft SharePoint environment for fostering collaboration, automating processes, and standardizing information sharing across schools, departments, units, and groups. Northwestern SharePoint Online is comprised of site collections - hierarchical sets of sites that can be managed together and each can have their own features and permissions. Site collections can be created for schools (by campus), departments, projects, programs, centers, and institutes and are administered by a designated site collection owner(s). Go here to start exploring your SharePoint sites → [SharePoint Online](#).

Support

To request a new SharePoint site visit the [Collaboration Services Requests Page](#).

For site-specific questions, contact your local technical support staff.

For general usage questions, contact the IT Support Center at 847-491-4357 (1-HELP) or visit the [IT Support Center web page](#) for additional support options.

For additional help see [Microsoft's SharePoint Help center page](#).

Your Sites

The screenshot displays the SharePoint 'Your Sites' interface. At the top, there's a navigation bar with the SharePoint logo, a search bar labeled 'Search in SharePoint', and icons for links, settings, help, and a user profile. Below the navigation bar, the left sidebar contains a 'Following' section with a list of sites: 'Team Site Example', 'RCDS-Teams', 'CoP - Cloud', 'Research Data Management', 'ITS&S RCDS', and a 'See all' link. Below this is a 'Recent' section with a list of sites: 'SharePoint', 'ITS&S RCDS', 'Weinberg College Commons', 'Ithaka Data Study', 'OneDrive Home', and another 'See all' link. The main content area is titled 'Frequent sites' and features a grid of six site tiles. Each tile has a colored header with an icon and a star, the site name, and a list of recent activities. The sites shown are: 'ITS&S RCDS' (purple header), 'Weinberg College Commons' (dark blue header), 'Ithaka Data Study Group' (blue header), 'SharePoint' (brown header), 'Research Data Management Group' (dark blue header), and 'OneDrive Home' (brown header). The 'OneDrive Home' tile indicates 'There's no recent activity on this site.'

SharePoint

Search in SharePoint

Create news post

Following

- Team Site Example
- RCDS-Teams
- CoP - Cloud
- Research Data Management
- ITS&S RCDS
- See all

Recent

- SharePoint
- ITS&S RCDS
- Weinberg College Commons
- Ithaka Data Study
- OneDrive Home
- See all

Frequent sites [See all](#)

IR

ITS&S RCDS

- You viewed Using SharePoint for research 4 minutes ago
- Leticia Vega modified Symposium_Ag...Planning 23 hours ago
- You viewed choosing-data-storage 7 minutes ago

WC

Weinberg College Commons

- You viewed 3. Tool Tip: Repo...Point Sharing 7 minutes ago
- Home is popular
- You viewed 1. Tool Tip: Use...r Local Files 10 minutes ago

gN

Ithaka Data Study Group

- You viewed Interviewees_Ithaka_Study_2023 5 hours ago
- You viewed Home on 1/8/2024
- Data Management Guide for Ithaka study is popular

N

SharePoint

- You viewed Home 3 minutes ago
- Page not found is popular

RD

Research Data Management Group

- You viewed Home on 1/2/2024
- You viewed data-security on 12/8/2023

OH

OneDrive Home

There's no recent activity on this site.

Sites you've visited

The screenshot shows the SharePoint 'Sites you've visited' interface. The top navigation bar includes the SharePoint logo, a search bar, and icons for links, settings, help, and a user profile. The left sidebar contains a 'Create news post' button and a list of sites under 'Following' and 'Recent' categories. The main content area displays a grid of 'Frequent sites' with activity feeds for each site. A red box highlights the 'Frequent sites' section.

Following

- Team Site Example
- RCDS-Teams
- CoP - Cloud
- Research Data Management
- ITS&S RCDS

Recent

- SharePoint
- ITS&S RCDS
- Weinberg College Commons
- Ithaka Data Study
- OneDrive Home

Frequent sites

- IR** ITS&S RCDS
 - You viewed Using SharePoint for research 4 minutes ago
 - Leticia Vega modified Symposium_Ag...Planning 23 hours ago
 - You viewed choosing-data-storage 7 minutes ago
- WC** Weinberg College Commons
 - You viewed 3. Tool Tip: Repo...Point Sharing 7 minutes ago
 - Home is popular
 - You viewed 1. Tool Tip: Use...r Local Files 10 minutes ago
- gN** Ithaka Data Study Group
 - You viewed Interviewees_Ithaka_Study_2023 5 hours ago
 - You viewed Home on 1/8/2024
 - Data Management Guide for Ithaka study is popular
- N** SharePoint
 - You viewed Home 3 minutes ago
 - Page not found is popular
 - How To Use This Library is popular
- Research Data Management Group**
 - You viewed Home on 1/2/2024
 - You viewed data-security on 12/8/2023
- OH** OneDrive Home
 - There's no recent activity on this site.

Sites you follow

SharePoint

Search in SharePoint

Create news post

Following

- Team Site Example
- RCDS-Teams
- CoP - Cloud
- Research Data Management
- ITS&S RCDS
- [See all](#)

Recent

- SharePoint
- ITS&S RCDS
- Weinberg College Commons
- Ithaka Data Study
- OneDrive Home
- [See all](#)

Frequent sites

[See all](#)

IR

ITS&S RCDS

You viewed **Using SharePoint for research** 4 minutes ago

Leticia Vega modified **Symposium_Ag...Planning** 23 hours ago

You viewed **choosing-data-storage** 7 minutes ago

WC

Weinberg College Commons

You viewed **3. Tool Tip: Repo...Point Sharing** 7 minutes ago

Home is popular

You viewed **1. Tool Tip: Use...r Local Files** 10 minutes ago

gN

Ithaka Data Study Group

You viewed **Interviewees_Ithaka_Study_2023** 5 hours ago

You viewed **Home** on 1/8/2024

Data Management Guide for Ithaka study is popular

N

SharePoint

You viewed **Home** 3 minutes ago

Page not found is popular

How To Use This Library is popular

Research Data Management Group

You viewed **Home** on 1/2/2024

You viewed **data-security** on 12/8/2023

OH

OneDrive Home

There's no recent activity on this site.

Inside a SharePoint Site

The screenshot displays the SharePoint interface for a site named "Ithaka Data Study". At the top, a dark purple header bar contains the "SharePoint" logo, a search bar labeled "Search this site", and icons for help, settings, and a user profile. Below the header, the left sidebar shows navigation options: Home (selected), Conversations, Documents, Notebook, Pages, Site contents, and Recycle bin. The main content area features a "News" section with a "Keep your team updated with news on your team site" message and an "Add News" button. To the right, there are "Quick links" and a "Documents" section with a "See all" link. The bottom of the page shows an "Activity" feed.

SharePoint

Search this site

gN Ithaka Data Study

Private group Not following 4 members

Published Share Edit

Home

Conversations

Documents

Notebook

Pages

Site contents

Recycle bin

Edit

+ New Page details Analytics

News

+ Add

Keep your team updated with news on your team site

From the site home page you'll be able to...

Add News

Quick links

Learn about a team site

Learn how to add a page

Documents See all

All Documents

Name

Activity See all

Types of SharePoint sites

Communication

- Content hosting only
- Default: Empty folder
- Visible in SharePoint or OneDrive interfaces
- Create directories to group content

Teams

- A folder for every channel
- Default: General
- Visible in SharePoint or Teams
- Can add additional folders
 - Not visible in teams

Communication Site example

SharePoint

RT RCDS-TEST

Home

Notebook

Documents

Pages

Site contents

Recycle bin

Edit

+ New

Upload

Documents

Name
Brian's Shared
Kevin's Shared folder
Tobin's Shared

OneDrive

Search

Add shortcut to My files Pin to Quick access Sync

RT RCDS-TEST > Documents

Name	Modified
Brian's Shared	October 3, 2023
Kevin's Shared folder	October 31, 2023
Tobin's Shared	October 3, 2023

Teams site example

SharePoint Search this site

Research Data Management

+ New Page details Analytics

Documents

+ New Upload Sync

Name	Modified
General	May 13, 2022
NIH-DMSP	June 20, 2023
presentations	March 20, 2023
test	October 6, 2023
web-content	July 18, 2023

OneDrive Search

Add shortcut to My files Pin to Quick access Sync

Research Data Management > Documents

In channels

In site library

Name	Modified
General	May 13, 2022
NIH-DMSP	June 20, 2023
presentations	March 20, 2023
test	October 6, 2023
web-content	July 18, 2023

All teams

Research Data Management

General

General Posts Files

+ New Upload

Documents > General

Name

Content: Pages & Libraries

Parts of a SharePoint site

Ways to organize content

Pages

Libraries

Parts of a SharePoint site

Ways to organize content

Pages

- Create your own internal **website**
- Organize content into **Pages**
- Page called **Home** created by default
- Add **Sections** to **Pages**

Libraries

Parts of a SharePoint site

Ways to organize content

Pages

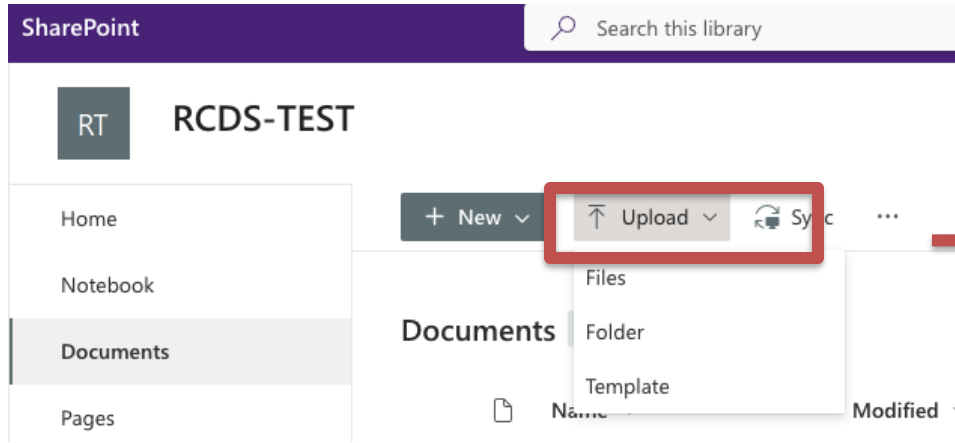
- Create your own internal **website**
- Organize content into **Pages**
- Page called **Home** created by default
- Add **Sections** to **Pages**

Libraries

- Where to **store files**
- Organize files in **Folders**
- One called **Documents** is created by default

Transferring files in and out of SharePoint

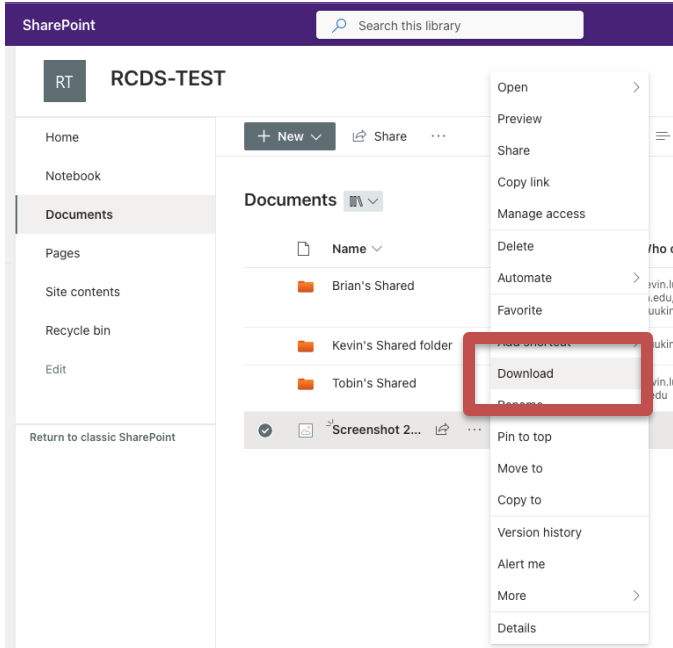
Upload



Opens file browser window

Or drag and drop

Download



Downloads to downloads
folder

Syncing to your computer

- Install OneDrive App
- "Files on Demand" - ON
- Choose SharePoint files to sync
 - Add shortcuts to OneDrive.
 - [Sync document library.](#)



<https://support.microsoft.com/en-us/office/sync-sharepoint-files-and-folders-87a96948-4dd7-43e4-aca1-53f3e18bea9b>

Add Shortcuts to OneDrive

The image illustrates the steps to add a shortcut to OneDrive from a SharePoint site library. On the left, the 'Documents' section of a SharePoint site is shown. A folder named 'test' is selected and highlighted with a red box. A context menu is open over the 'test' folder, with the option 'Add shortcut to OneDrive' highlighted by a red box. A red arrow points from this menu item to the right. On the right, the OneDrive 'My files' section is shown. A folder named 'test' is visible in the file list, also highlighted with a red box. The folder 'test' is shown with a blue checkmark icon, indicating it has been successfully added as a shortcut.

Documents

In channels

In site library

Name

General

NIH-DMSP

presentations

test

web-content

Share

Copy link

Manage access

Delete

Automate

Favorite

Add shortcut to OneDrive

Rename

Pin to top

Move to

Copy to

Folder color

OneDrive

My files

Name

Modified

WCAS LifeSciences Allocation

October 7, 2022

test

A few seconds ago

Sync Document Library

Northwestern SharePoint

RT RCDS-TEST

+ New Upload Sync Add shortcut to OneDrive Pin to Quick

Documents

Name	Modified	Who owns	M
Brian's Shared	October 3, 2023	kevin.luu@Northwestern.edu, kluuking@gmail.com	Ke
Kevin's Shared folder	October 31, 2023	kluuking@gmail.com	Ke
Tobin's Shared	October 3, 2023	kevin.luu@northwestern.edu	Ke



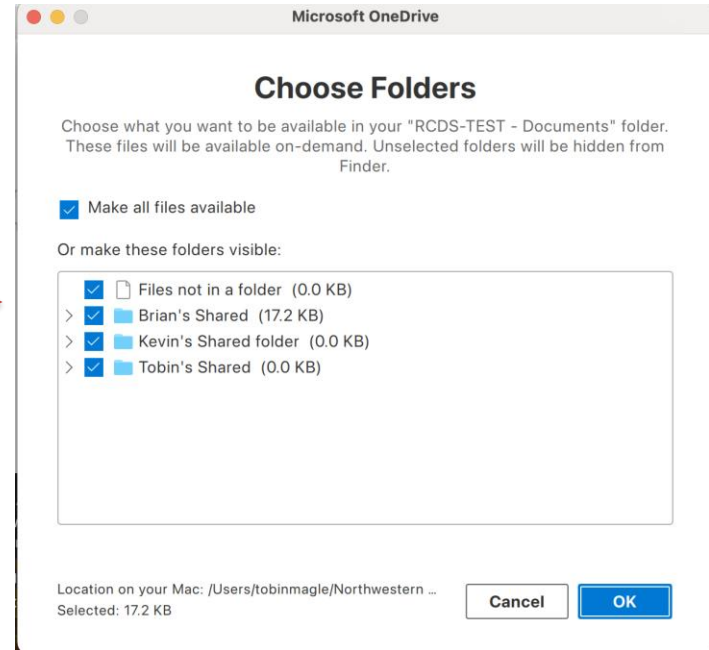
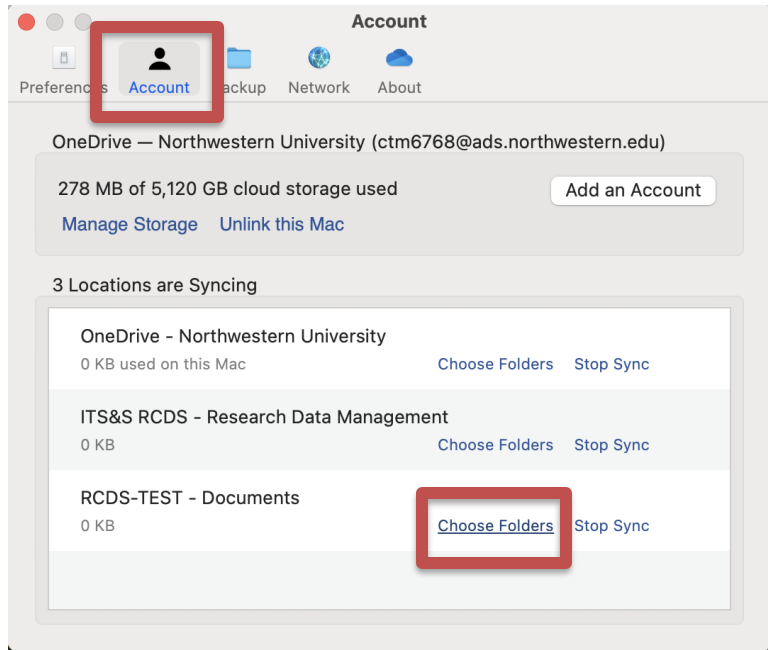
We're syncing your files

You can close this dialog and your files will continue to sync in the background. If there is no response, you may need to [install the latest version of OneDrive](#).

Close

Choose files

Open OneDrive App



Globus data transfer tool

Move large amounts of data
between storage platforms

- High speed transfers
- Data integrity checks
- Resumes interrupted data transfers
- Easy to use interface
- Automation features



SharePoint Limitations

Feature	Limit
Total amount of data	25 TB
Individual file size	250 MB
Data uploaded/download	250 GB or 10k files per day
File movement	30,000 files at once
Syncing files	300,000 files total across sites

<https://learn.microsoft.com/en-us/office365/servicedescriptions/sharepoint-online-service-description/sharepoint-online-limits>

File Organization

Good Organization Practices

There's no one right answer

- Make a system that works for you
- Think about who needs access
- Group similar files into folders
- Use descriptive names



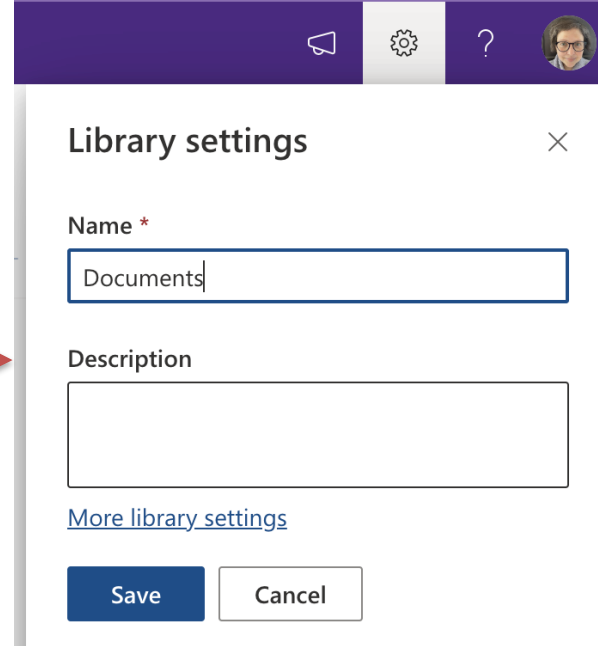
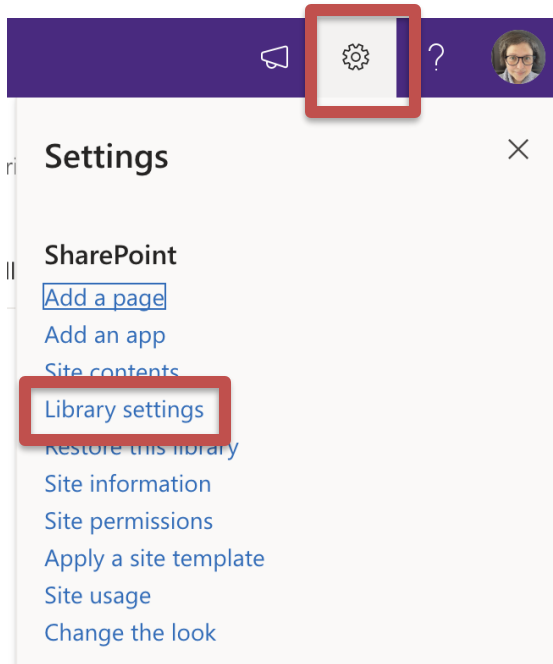
SharePoint Library tips

- Keep the number of files <100,000
- Organize based on who needs access
- E.g.: a library for files only visible to your team and a separate library for content shared outside your team
- Rename your Libraries descriptively

Naming advice

- Names should tell you what's in the file
- Make sure to include information that differentiates files
- Use sort to your advantage
 - General to specific
 - Ex: YYYY-MM-DD vs MM-DD-YY)
- Pick a convention and stick to it

Rename library



Create a new Library

The screenshot displays the 'Research Data Management' interface. On the left, a sidebar contains a 'Home' button and a list of items: 'Documents', 'Recycle bin', and 'Edit'. A '+ New' button is visible, with a dropdown menu open showing options: 'List', 'Document library' (highlighted), 'Page', 'Space', 'News post', 'News link', 'Plan', and 'App'. A red arrow points from the 'Document library' option to the 'Create new document library' section on the right. This section features three options: 'Blank library' (with a plus icon), 'From existing library' (with a list icon and highlighted by a red box), and 'Copies metadata fields' (with a list icon). Below this, a 'Templates' section shows three cards: 'Media library' (with a camera icon), 'Invoices' (with a calculator icon), and 'Learning' (with a stack of books icon).

Research Data Management

Home

Documents

Recycle bin

Edit

+ New

Page detail

List

Document library

Page

Space

News post

News link

Plan

App

Create new document library

Blank library

From existing library

Copies metadata fields

Templates

Media library

Invoices

Learning

Add Metadata

The screenshot displays a table with three columns: 'Name', 'Modified', and 'Modified By'. The 'Name' column contains a folder icon and the text 'General'. The 'Modified' column shows the date 'March 17, 2023'. The 'Modified By' column shows 'CS Admin'. A red box highlights the '+ Add column' button in the top right corner of the table. A red arrow points from this button to a 'Create a column' dialog box. The dialog box has a title 'Create a column' and a text input field with a 'T' icon. Below the input field, it says 'Set a single line of text'. To the right of the input field is a list of column types: 'Text' (selected), 'Choice', 'Date and time', 'Multiple lines of text', 'Person', 'Number', and 'Yes/No'. At the bottom of the dialog, there is a 'Show or hide columns' link with a gear icon, and two buttons: 'Next' and 'Cancel'.

Name	Modified	Modified By
General	March 17, 2023	CS Admin

Create a column

Set a single line of text

- ☒ Text
- ☐ Choice
- ☐ Date and time
- ☐ Multiple lines of text
- ☐ Person
- ☐ Number
- ☐ Yes/No

[Show or hide columns](#) Next Cancel

Custom Metadata

The screenshot shows the 'Create a column' dialog box in Microsoft Excel. The dialog has a title bar 'Create a column' with a close button. Below the title bar, there is a link 'Learn more about column creation.' and a 'Name' field. The 'Description' field is also present. The 'Type' dropdown menu is open, showing a list of column types: 'Single line of text', 'Multiple lines of text', 'Number', 'Yes/No', 'Person or Group', 'Date and time', 'Choice', 'Hyperlink', 'Currency', 'Location', 'Image', 'Managed metadata', and 'Lookup'. The 'Text' option is highlighted with a red box. Below the list, there is a 'Default value' field and a checkbox 'Use calculated value'. At the bottom, there are 'Save' and 'Cancel' buttons. The background of the dialog shows a preview of the column type selected, which is 'Single line of text'.

Create a column

[Learn more about column creation.](#)

Name *

Description

Type

Single line of text

Default value

Enter a default value

☐ Use calculated value ⓘ

More options ▾

Save Cancel

Text

Choice

Date and time

Multiple lines of text

Person

Number

Yes/No

Next Cancel

Show or hide columns

System Metadata

The image shows a 'Create a column' dialog box with a list of column types. The 'Text' option is highlighted with a red box. A red arrow points from this box to the 'Edit view columns' panel on the right, which shows a list of columns with checkboxes for selection.

Create a column

Set a single line of text

- ☒ Text
- ☐ Choice
- ☐ Date and time
- ☐ Multiple lines of text
- ☐ Person
- ☐ Number
- ☐ Yes/No

☒ Apply

Edit view columns

Select the columns to display in the list view. To change ordering, use drag-and-drop or the "up" and "down" buttons next to each column.

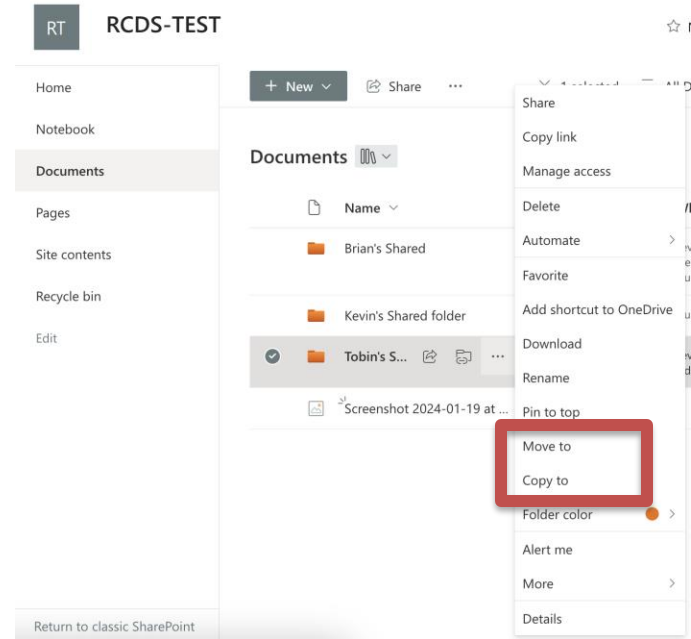
- ☒ Type
- ☒ Name
- ☒ Modified
- ☒ Modified By
- ☐ Compliance Asset Id
- ☐ Description
- ☐ ID
- ☐ Content Type
- ☐ Created
- ☐ Created By
- ☐ Check In Comment
- ☐ File Size
- ☐ Item Child Count

☒ Show or hide columns

Next **Cancel**

Moving and copying files

- Reorganizing content within OneDrive and SharePoint
- Differences in behavior
- Files that are copied or moved in a single operation must be:
 - No more than 100 GB total file size
 - No more than 30,000 files
 - Less than 15 GB



Moving and copying files

Moving

- Creates the file in the new location
- Deletes the original from the source (Recycle bin)
- Retains version history

Copying

- Creates a copy of the original file at the destination
- File remains at the origin
- Loses version history

Moving files:

OneDrive to SharePoint

- SharePoint changes the file metadata (changes checkpoint)
- Hyperlinks stop working
- Follows stop working
- Microsoft suggests replacing original doc with a link to the new doc

SharePoint to OneDrive

- Collaborators will lose access

<https://nuwildcat.sharepoint.com/sites/WNB-College-Commons/SitePages/WITS-Tool-Tip-2.aspx>

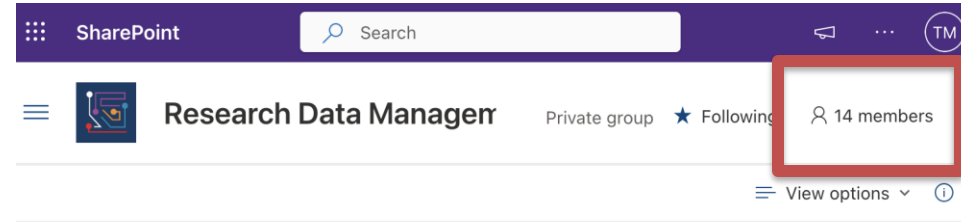
Access and Sharing

Access best practices

- **Tradeoff** between openness and security
- "**Least privilege**" - limit access to minimal number of people
- Required by some DUAs
- Groups based on role can help with large groups and large libraries

Site Level Access

- People who have access to **all the content** in the site
- Includes documents (unless otherwise specified)
- Roles: Owner, Member, Visitor



Group membership

14 members

 Add members

SharePoint User Roles

Owner

- Manage site features
- Delete a site
- See all content

Member

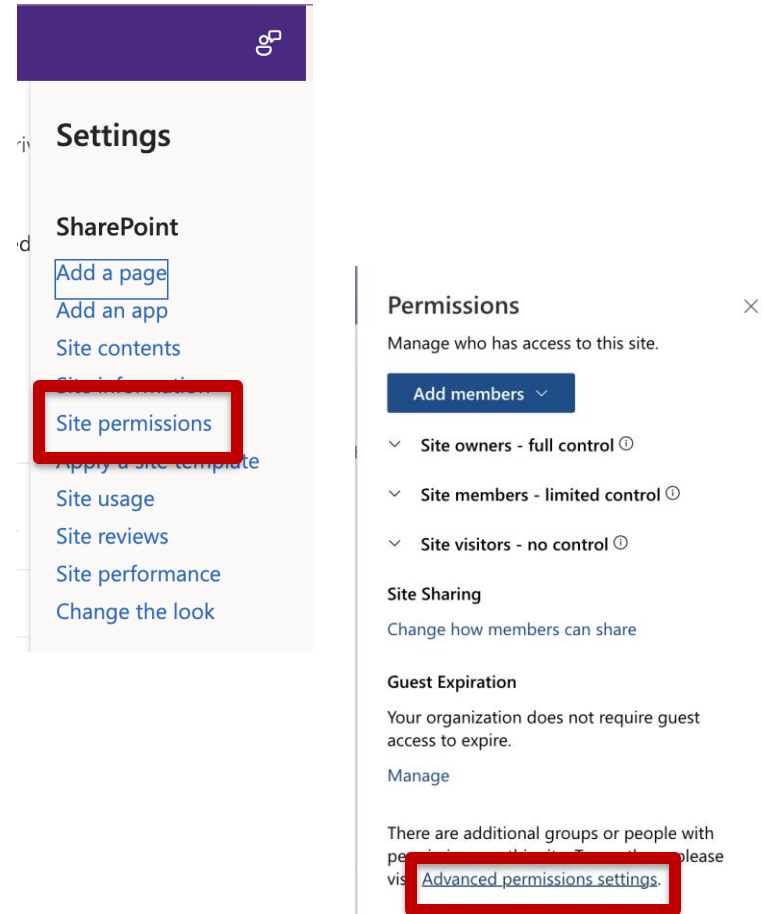
- Add content
- Edit content
- Delete content
- Share

Visitor

- Read only
- Can Download
- Can share with approval

Custom groups

- Create groups of people who you can share specific content with
- Note: by default, people in these groups have access to everything in the library when the group is created. Need to be removed manually.



Custom groups

Northwestern SharePoint

BROWSE PERMISSIONS

Grant Permissions Create Group Edit User Permissions Remove User Permissions Check Permissions

Grant Modify Check Manage

Permission Levels Access Request Settings Site Collection Administrators

Home Documents Recent NU Libraries test Galter testq Recycle Bin EDIT LINKS

Some content on this site has different permissions from what you see here. [Show these items.](#) There are limited access users on this site. Users may have limited access if an item or document under the site has been shared with them. [Show users.](#)

	Type	Permission Levels
<input type="checkbox"/> <input checked="" type="checkbox"/> Name	SharePoint Group	Edit
<input checked="" type="checkbox"/> <input type="checkbox"/> Galter	SharePoint Group	Edit
<input checked="" type="checkbox"/> <input type="checkbox"/> NU Libraries	SharePoint Group	Edit
<input type="checkbox"/> <input type="checkbox"/> Research Data Management Members	SharePoint Group	Edit
<input type="checkbox"/> <input type="checkbox"/> Research Data Management Owners	SharePoint Group	Full Control
<input type="checkbox"/> <input type="checkbox"/> Research Data Management Visitors	SharePoint Group	Read

Custom permission Level

Apply to groups

- Add and remove permissions
- Document library in List permissions menu
- Dependencies: If you have edit permissions, you also need View permissions
- E.g.: Create an edit, no delete permission level



EDIT LINKS

Permissions › Permission Levels ⓘ

Home
Documents
Recent
NU Libraries
test
Galter
testq
Recycle Bin

Add a Permission Level | Delete Selected Permission Levels

Permission Level	Description
<input type="checkbox"/> Full Control	Has full control.
<input type="checkbox"/> Design	Can view, add, update, delete, approve, and customize.
<input type="checkbox"/> Edit	Can add, edit and delete lists; can view, add, update and delete items and documents.
<input type="checkbox"/> Contribute	Can view, add, update, and delete list items and documents.
<input type="checkbox"/> Read	Can view pages and list items and download documents.

Select the permissions to include in this permission level.

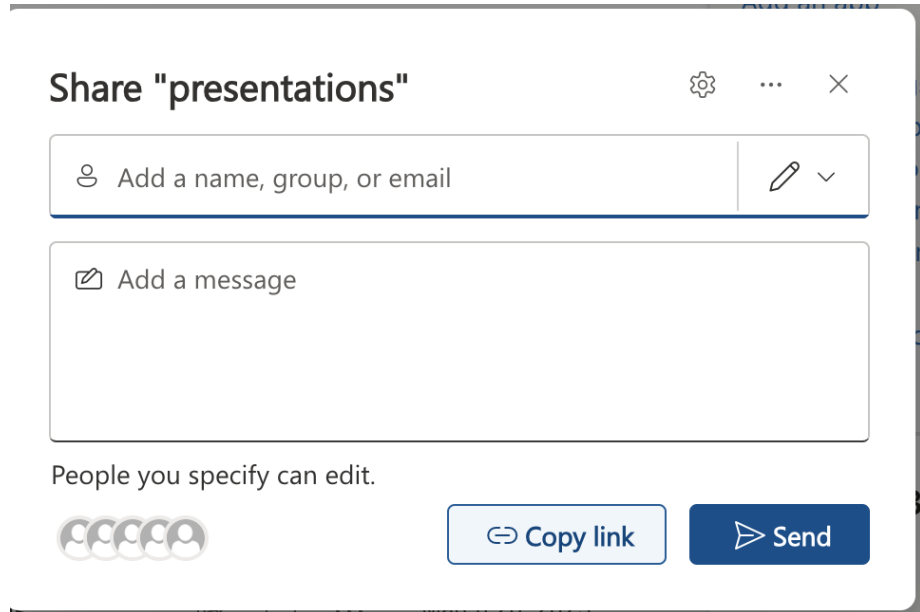
☐ **Select All**

List Permissions

- ☐ Manage Lists - Create and delete lists, add or remove columns in a list, and add or remove public views of a list.
- ☐ Override List Behaviors - Discard or check in a document which is checked out to another user, and change or override settings which allow users to read/edit only their own items
- ☐ Add Items - Add items to lists and add documents to document libraries.
- ☐ Edit Items - Edit items in lists, edit documents in document libraries, and customize Web Part Pages in document libraries.
- ☐ Delete Items - Delete items from a list and documents from a document library.
- ☐ View Items - View items in lists and documents in document libraries.
- ☐ Approve Items - Approve a minor version of a list item or document.

Sharing outside site level access

- Can **share** files/folders with additional people
- Choose type of access (edit or view)
- Limit: <50,000 files



The screenshot shows a 'Share' dialog box titled 'Share "presentations"'. It features a search bar with the placeholder text 'Add a name, group, or email' and a dropdown arrow. Below this is a text area with the placeholder 'Add a message'. At the bottom, it says 'People you specify can edit.' followed by five person icons. There are two buttons: 'Copy link' and 'Send'.

Share "presentations"

Add a name, group, or email

Add a message

People you specify can edit.

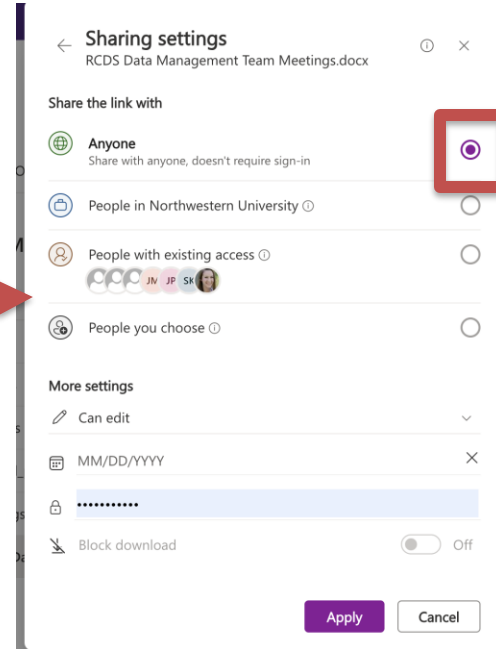
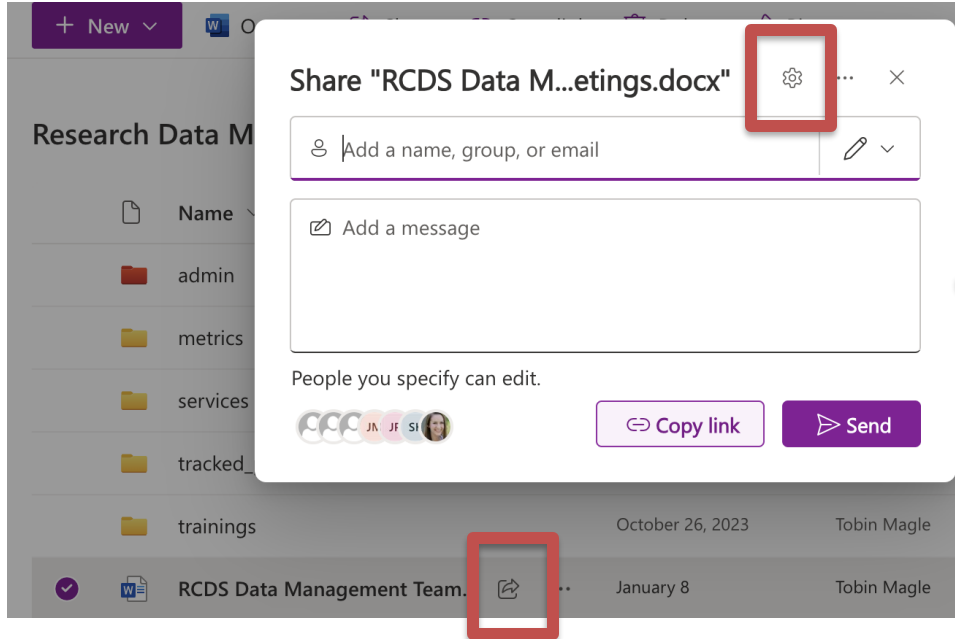
Copy link Send

Anonymous sharing

Anyone with the link can...

- Sharing with no authentication (ie: public)
- Can see which files are shared this way
- Can't track who has accessed it
- Can be disabled at the site level

Anonymous sharing



But what if you need to restrict
access to files?

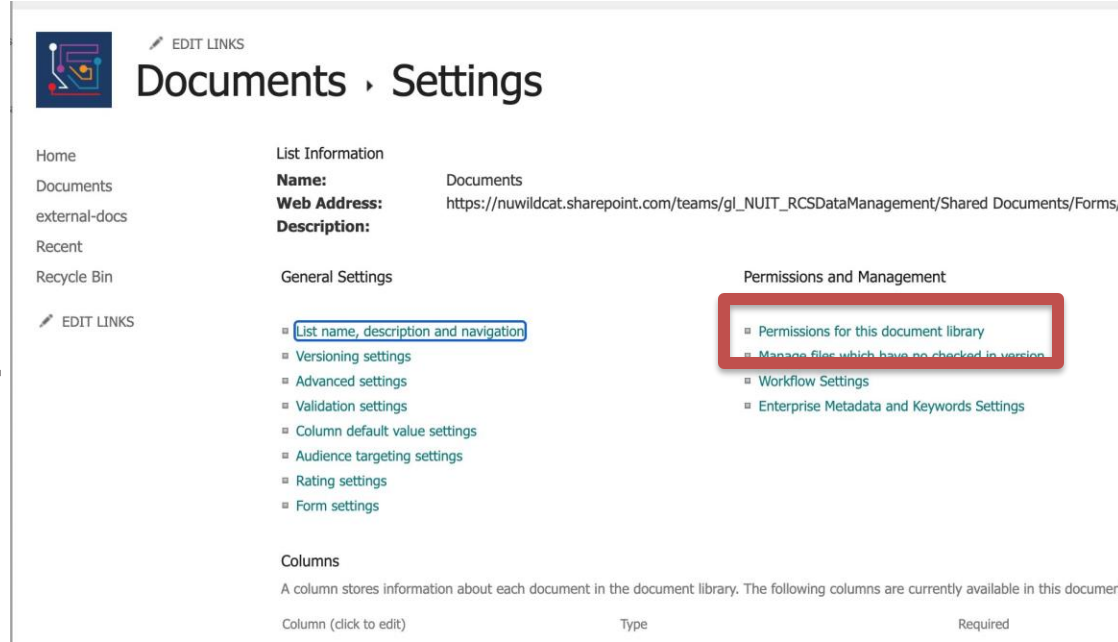
Breaking Inheritance

Share a document library with a different set of users than the main site

- Remove access from site level access
- Add new set of users

Breaking Inheritance

Settings >
Library Settings >
More Library Settings>



EDIT LINKS

Documents > Settings

Home
Documents
external-docs
Recent
Recycle Bin

EDIT LINKS

List Information
Name: Documents
Web Address: https://nuwildcat.sharepoint.com/teams/gl_NUIT_RCSDDataManagement/Shared Documents/Forms
Description:

General Settings

- List name, description and navigation
- Versioning settings
- Advanced settings
- Validation settings
- Column default value settings
- Audience targeting settings
- Rating settings
- Form settings

Columns

A column stores information about each document in the document library. The following columns are currently available in this document library.

Column (click to edit)	Type	Required
------------------------	------	----------

Permissions and Management

- Permissions for this document library
- Manage files which have no checked in version
- Workflow Settings
- Enterprise Metadata and Keywords Settings

Breaking Inheritance

Settings >
Library Settings >
More Library Settings>
Permissions for this
Document Library >
Stop Inheriting Permissions

Northwestern SharePoint

BROWSE PERMISSIONS

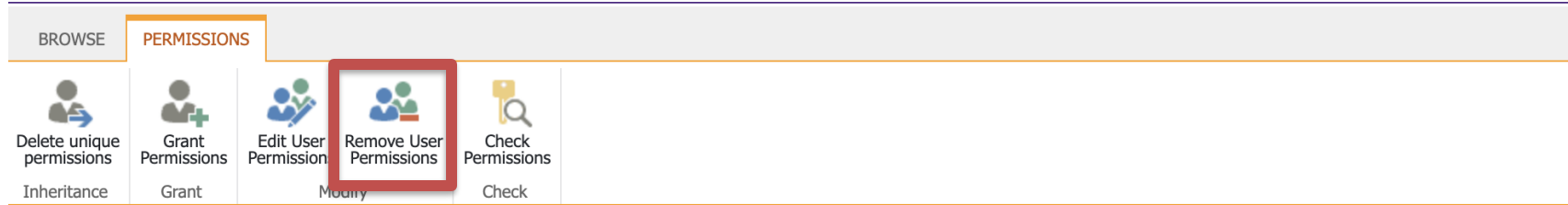
Manage Parent Inheritance Stop Inheriting Permissions Check Permissions

Home Documents external-docs Recent Recycle Bin EDIT LINKS

⚠ There are limited access users on this site. Users may have limited access if an item has been shared with them. [Show users.](#) This library inherits permissions from its parent. ([Research Data Management](#))

<input type="checkbox"/> Name	Type	Permission Levels
<input type="checkbox"/> Research Data Management Members	SharePoint Group	Edit
<input type="checkbox"/> Research Data Management Owners	SharePoint Group	Full Control
<input type="checkbox"/> Research Data Management Visitors	SharePoint Group	Read

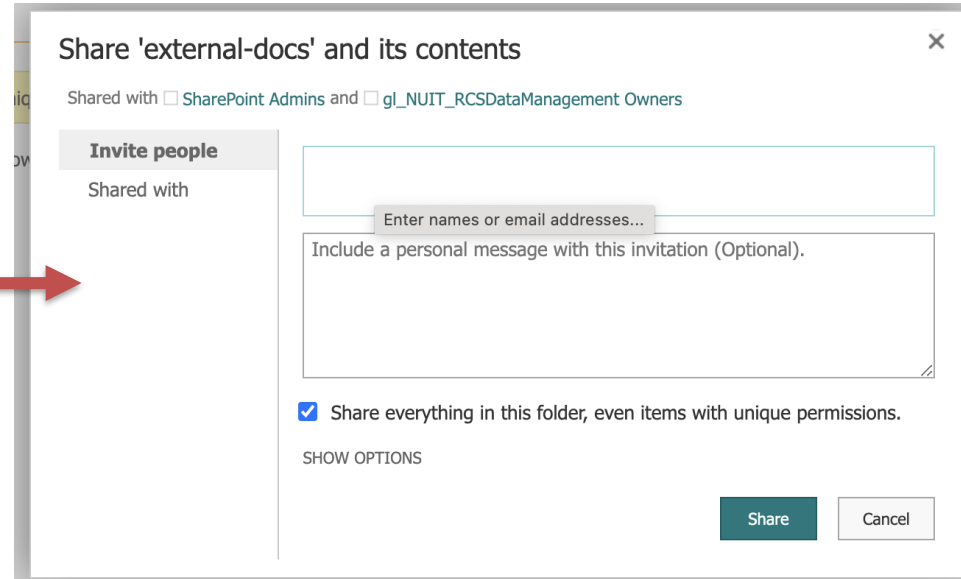
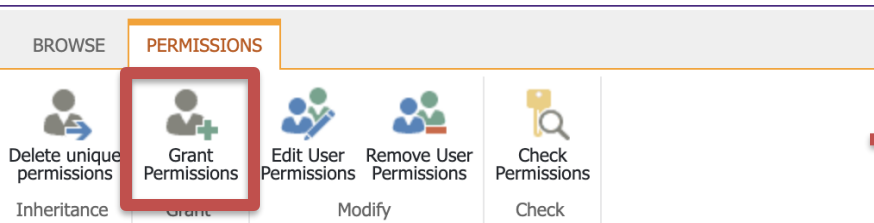
Remove Group permissions



The screenshot shows the SharePoint interface with the 'PERMISSIONS' ribbon selected. The 'Remove User Permissions' button is highlighted with a red box. Below the ribbon, a yellow warning banner states 'This library has unique permissions.' To the left is a navigation pane with links to Home, Documents, external-docs, Recent, Recycle Bin, and EDIT LINKS. To the right is a table of permissions.

	Type	Permission Levels
<input checked="" type="checkbox"/> <input type="checkbox"/> Name	SharePoint Group	Edit
<input checked="" type="checkbox"/> <input type="checkbox"/> Research Data Management Members	SharePoint Group	Full Control
<input checked="" type="checkbox"/> <input type="checkbox"/> Research Data Management Owners	SharePoint Group	Read
<input checked="" type="checkbox"/> <input type="checkbox"/> Research Data Management Visitors		

Add other users



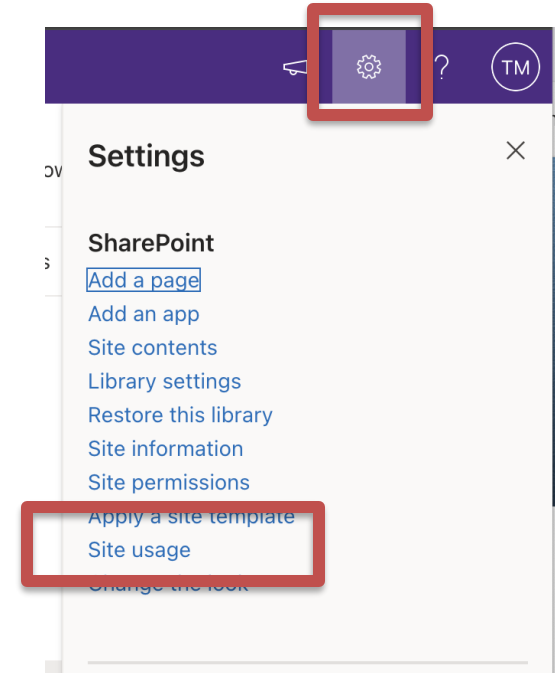


Who has access?

Audit File Sharing

Check to make sure only people who need access have access

- Which files are shared?
- Who has access?
- What kind of access?



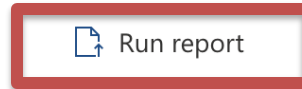
Audit File Sharing




- Check to make sure only people who need access have access

Under Settings > Site Usage:

- Scroll to bottom to "Shared with External Users" section
- Click "Run Report"
- Can take a while to run

Shared with external users



 Name	Modified ↓
 __sitelcon__.jpg	15 hours ago
 Data-Archiving.aspx	5 days ago

Audit Report

Research Data Management_2024-1-17-16-49-0_1

Search for tools, help, and more (Option + Q)

File Home Insert Share Page Layout Formulas Data Review View Automate Help Draw

Comments Catch up Viewing Share

12 B General \$ 0.00 0.00

File	Role	Who	Link Sharing
Resource Path	Item Type	Permission	User Name
User Email	User Or Group Type	Link ID	Link Type
AccessViaLinkID			
teams/gl_NUIT_List	Read	Research Data Management Visitors	SharePointGroup
teams/gl_NUIT_List	Edit	Research Data Management Members	SharePointGroup
teams/gl_NUIT_pptx	Full Control	Research Data Management Owners	SharePointGroup
teams/gl_NUIT_pptx	Read	Research Data Management Visitors	SharePointGroup
teams/gl_NUIT_pptx	Edit	Research Data Management Members	SharePointGroup
teams/gl_NUIT_pptx	Contribute	Mike Lasky	Internal
teams/gl_NUIT_Folder	Full Control	Research Data Management Owners	SharePointGroup
teams/gl_NUIT_Folder	Read	Research Data Management Visitors	SharePointGroup
teams/gl_NUIT_Folder	Edit	Research Data Management Members	SharePointGroup
teams/gl_NUIT_Folder	Contribute	SharingLink	SharePointGroup
teams/gl_NUIT_Folder	Contribute	tobin.magle	External
teams/gl_NUIT_Folder	Contribute	Tobin Magle	Internal
teams/gl_NUIT_docx	Full Control	Research Data Management Owners	SharePointGroup
teams/gl_NUIT_docx	Read	Research Data Management Visitors	SharePointGroup
teams/gl_NUIT_docx	Edit	Research Data Management Members	SharePointGroup
teams/gl_NUIT_docx	Contribute	SharingLink	SharePointGroup
teams/gl_NUIT_docx	Contribute	Annie M Speicher	Internal
teams/gl_NUIT_docx	Contribute	Christina Maimone	Internal

Questions?

researchdata@northwestern.edu

The background is a solid purple color. In the top-left and bottom-right corners, there are decorative geometric shapes consisting of overlapping triangles and rectangles in various shades of purple, creating a modern, abstract design.

Thank You